

# CRM CUSTOMERS

## INVOICES

You can view, download, print and/or email Sales Invoices for your Customers in CRM.

However, Sales Invoices are **created** in BPO only.

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**Ribbon Access:** Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

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## NAVIGATE TO CUSTOMER DASHBOARD (CUSTOMER HOME PAGE)

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To access your customer-specific list of Invoices, you will first need to navigate to the Customer Dashboard (Customer Home page).

1. In the **Dashboard** (Home page),
2. Click on the **Customers** tile.

CRM Example Company | Abigail Milne

Dashboard (1) | Search

Description	Target	Existing Custmrs	New Custmrs
Email	30	2	0
Meeting	20	0	2
On Site inspection	20	1	0
Phone call	20	2	0

Category	Value
Cases	~5,000.00
Invoices	~15,000.00
Orders	~12,000.00
Quotes	~45,000.00

Month	Value
Nov 2019	~6,000.00
Dec 2019	~2,000.00
Jan 2020	~0.00
Feb 2020	~0.00

Navigation: create cold call (15 Oct 2019, 19), recommendations, warnings (9), customers (75), cases (8) (2), activities (7), quotes (15), equipment (147), 3rd party (8)

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1. The **Customers** listing page will open.

## SEARCH AND SELECT CUSTOMER

2. You can use the **Page Reference field**,
3. the **Filter Row** or
4. the **Filter Text Box** to **search** for your customer.
5. Click on the selected **Customer icon** in the **View** column.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main navigation bar has a 'Customers' tile (1) and a search bar (4) with the placeholder text 'Type Customer name search filter here...'. Below is a table of customer invoices with columns: View, Customer, Code, Contact, Contact phone, Contact email, Complet, Status, Rank, Active, and Call Contact. The table lists 10 customers with their respective completion percentages and statuses. A pagination bar at the bottom shows 'Page 1 of 8 (74 items)' and a 'Page size: 10' dropdown (2). A callout (5) points to a question mark icon in the 'View' column of the first row.

View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
?	ABC SHoe Co	ABXZY12				8%	Active	Gold	Yes	No
?	ABI Goods	ABI0001	Lucy	081023503€		50%	New - CRM	Metal	No	Yes
?	Another new customer	ANO0001				8%	Active		No	No
?	Apple Juice Inc	APP0001	Duncan McCreddie			50%	Active	Gold	Yes	Yes
?	Bearing and Shoe	BEA001				25%	Active	Metal	No	No
?	Bernies Builders	BER0001				8%	Active		No	No
?	Betties Summer Shop at the Beach	BET0001	Bettie Summervel	031 123 45€		50%	Active	Gold	No	Yes
?	Big Bargains	BIG0001				8%	Active		Yes	No
?	Billys Barn	BIL0001				8%	Active		No	No
?	Bits and Bytes	BIT001				8%	Active		No	No

1. The **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Invoices** tile.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. At the top, a search bar contains 'ABC SHoe Co' (marked with a '1'). Below this are three charts: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. The 'Activities' table is as follows:

Description	Target	Existing Custmrs	New Custmrs
Email	30	2	0
Meeting	20	0	2
On Site inspection	20	1	0
Phone call	20	2	0

The '1 Month Performance' chart shows bars for Cases, Invoices, Orders, and Quotes. The '4 Month Pipeline' chart shows bars for Nov 2019, Dec 2019, Jan 2020, and Feb 2020. A central card for 'ABC SHoe Co - ABCXYZ123' displays a profile picture with a question mark and details: Trading Name (8%), Registered Name, Description, VAT No (9876543210), Rank (Gold), Website, and Phone. Below this is a '12 Months Sales History' chart with a legend for Contract Income and Sales Revenue. A navigation grid on the left includes icons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices' (marked with a '2'), 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'.

The **Invoices for [selected customer]** listing page

1. The **Invoices for [selected customer]** listing page will open.
2. All of the Invoices linked to this customer will be displayed (even ones where you are not the Salesman).

The following information columns can be viewed in this page:

3. **Invoice Type** (e.g. Parts)
4. Invoice **Reference** number

5. Invoice Value
6. Invoice Date and the
7. Salesman Name of each Invoice.

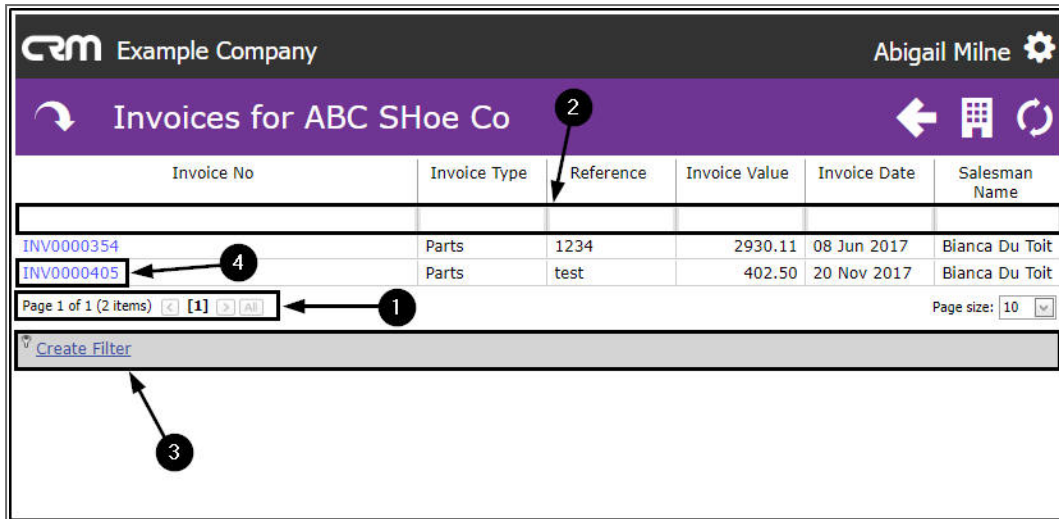
Invoice No	Invoice Type	Reference	Invoice Value	Invoice Date	Salesman Name
INV0000354	Parts	1234	2930.11	08 Jun 2017	Bianca Du Toit
INV0000405	Parts	test	402.50	20 Nov 2017	Bianca Du Toit

## SEARCH AND SELECT INVOICE

1. You can use the **Page Reference field** or the
2. **Filter Row** or the
3. **Create Filter Row** functionality to search for a particular Invoice.

## VIEW / DOWNLOAD / PRINT CUSTOMER INVOICE

4. In the **Invoice No.** column, click on the blue number of the Invoice that you wish to **View, Print** or **Download**.



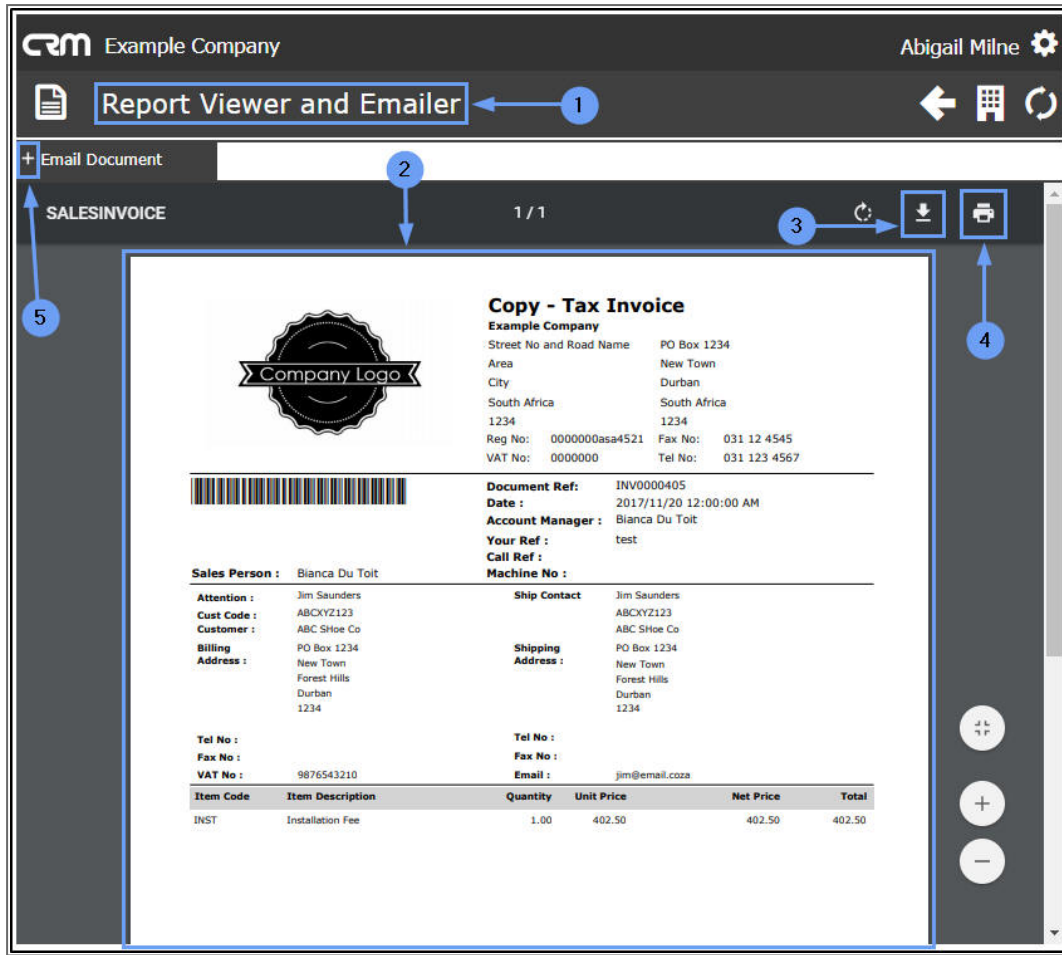
The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Invoices for ABC SHoe Co'. Below this is a table with columns: Invoice No, Invoice Type, Reference, Invoice Value, Invoice Date, and Salesman Name. Two rows are visible: one for invoice INV0000354 and another for INV0000405. Below the table is a pagination control showing 'Page 1 of 1 (2 items)' and a 'Page size' dropdown set to 10. A 'Create Filter' button is located below the pagination. Numbered callouts point to: 1. The pagination control; 2. The 'Reference' column header; 3. The 'Create Filter' button; 4. The 'Invoice No' cell for INV0000405.

Invoice No	Invoice Type	Reference	Invoice Value	Invoice Date	Salesman Name
INV0000354	Parts	1234	2930.11	08 Jun 2017	Bianca Du Toit
INV0000405	Parts	test	402.50	20 Nov 2017	Bianca Du Toit

1. The **Report Viewer and Emailer** page will open.
2. The selected Invoice will be displayed.
3. Here you can **Download** the Invoice and/or
4. **Print** the Invoice.

## EMAIL ORDER

5. Click on the expand icon [ + ] on the **Email Document** tab.



1. The **Email Document** frame will be expanded.

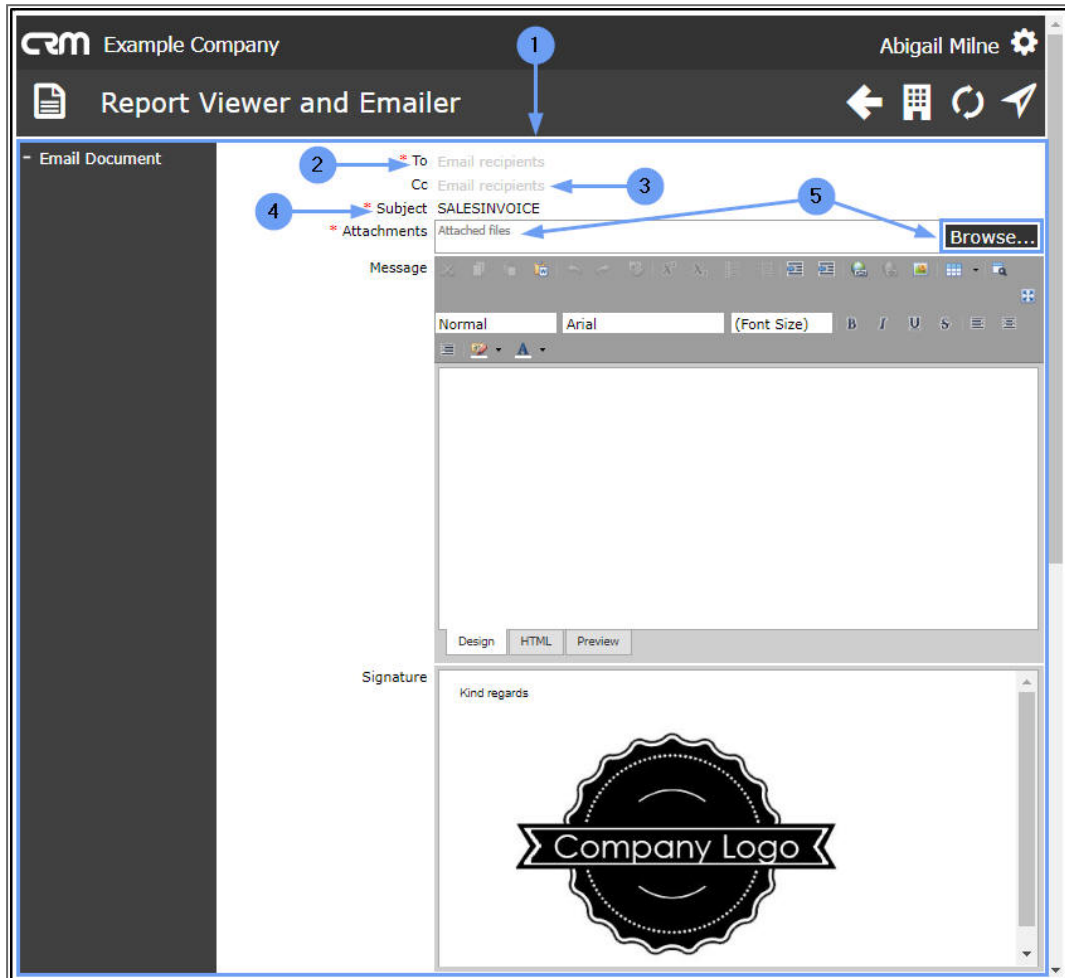
Check and/or add the following details, as necessary:

2. **To:** Either click in the field and select the preferred contact from the list, or type in the contact email address.
3. **Cc:** Here, you can add other email recipients, if applicable.
  - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above (separated by a semi-colon and a space).
4. **Subject:** This field will auto populate with **Sales Invoice** but you can edit this, if required.

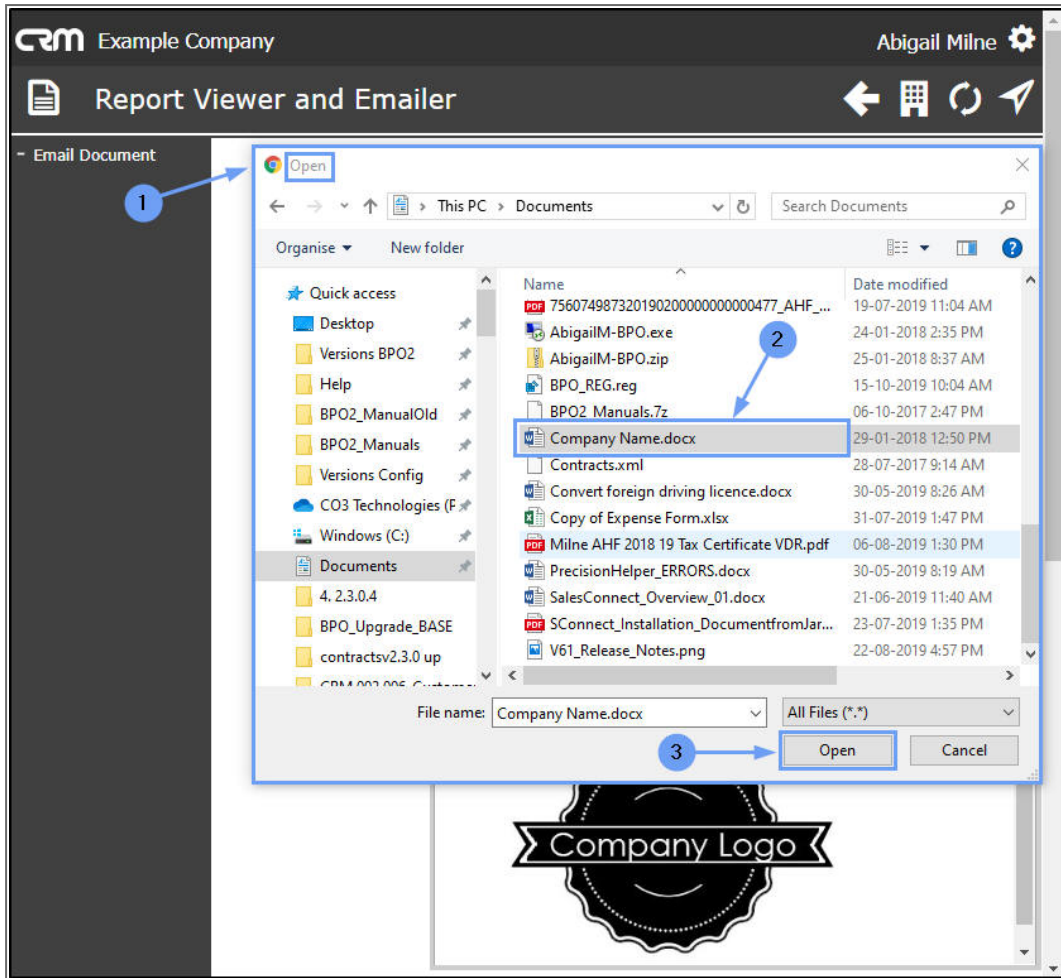
## ADD AN ATTACHMENT

You can add other documents, as attachments, if required.

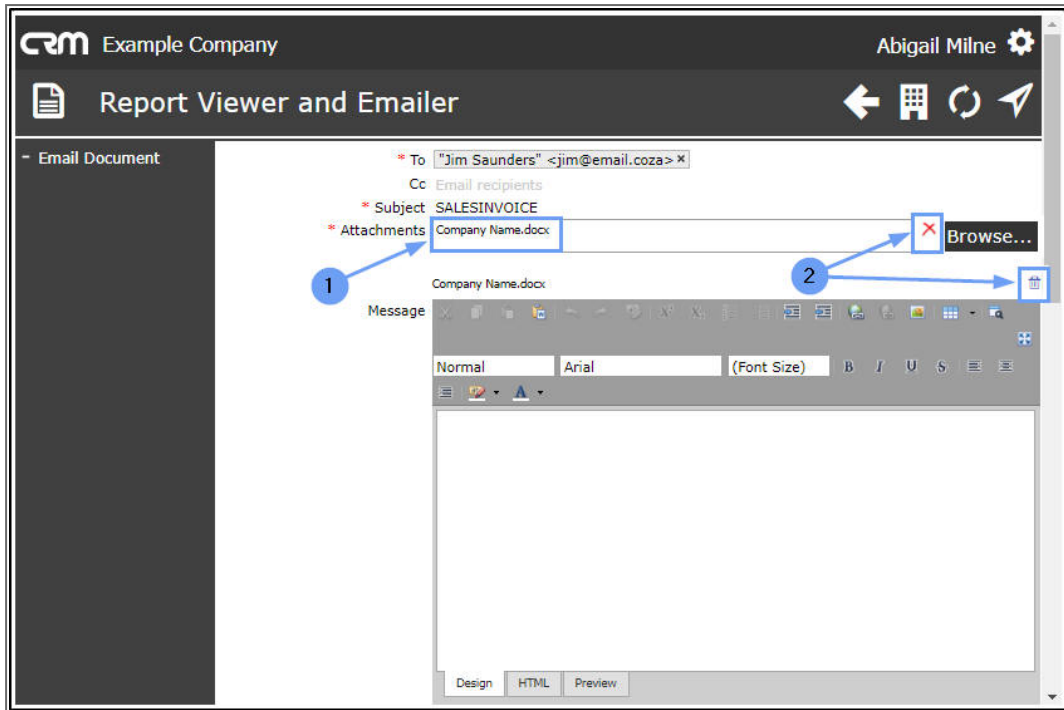
5. **Attachments:** Click on **Browse**.



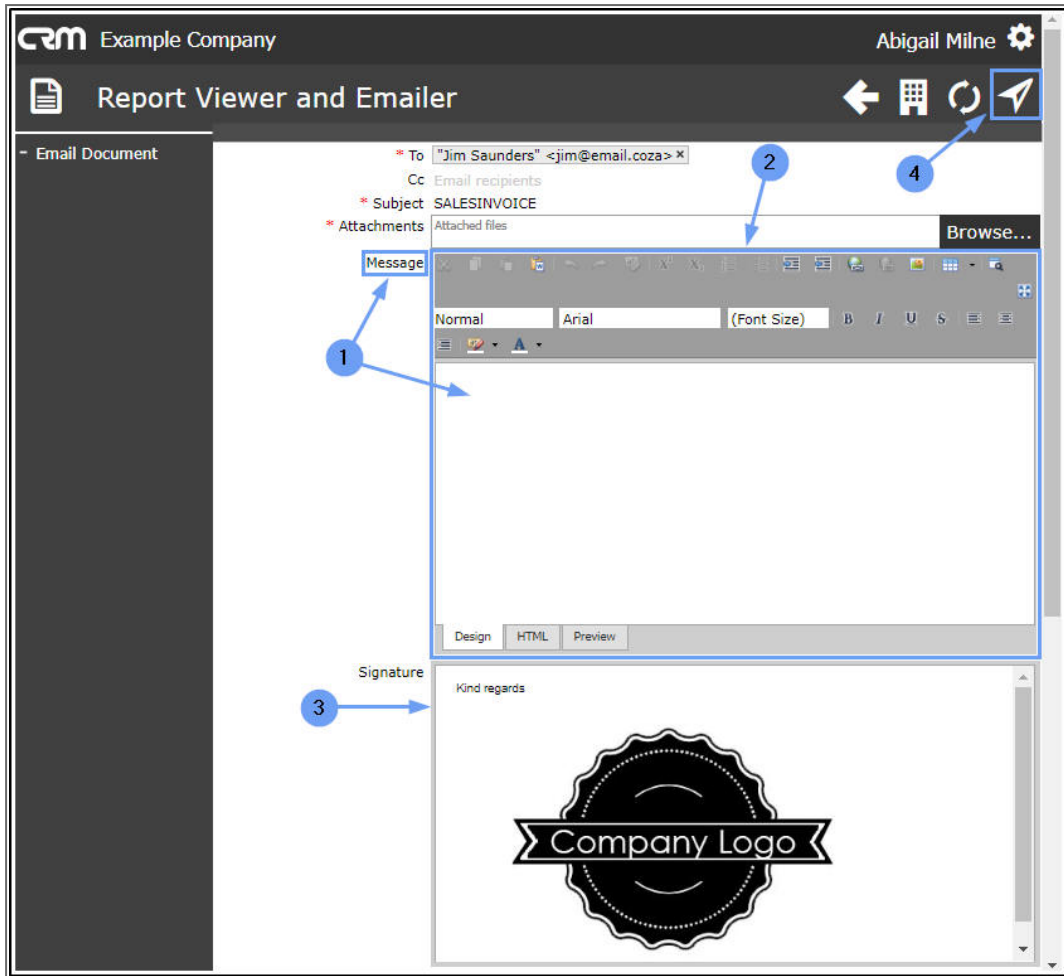
1. The **Open** screen will pop up.
2. Search for and select the file you wish to link to this Invoice.
3. Click on **Open**.



1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the **Delete** icons.



1. Type a relevant message in the **Message** body.
2. The **Message tool bar** can be used to customise your email message.
3. **Signature:** If you have a **Signature configured in CRM** - your Signature will pull through here, otherwise the **Company default CRM mail signature** will pull through.
4. Click on the **Send** icon.



1. A **message box** will pop up informing you of the status of the sent email.
2. Click on **Back**.

The screenshot shows a web application interface for viewing and emailing reports. At the top, a green notification bar states "Email saved to queue." Below this is a header bar with the title "Report Viewer and Emailer" and a navigation menu containing icons for back, home, refresh, and forward. A blue arrow labeled "1" points to the back icon, and another blue arrow labeled "2" points to the home icon.

The main content area displays a "SALESINVOICE" for "Example Company". The invoice includes a company logo, a barcode, and detailed contact information for both the sales person (Bianca Du Toit) and the ship contact (Jim Saunders). It also lists document reference, date, account manager, and machine number.

Item Code	Item Description	Quantity	Unit Price	Net Price	Total
INST	Installation Fee	1.00	402.50	402.50	402.50

1. You will return to the **Invoices for [selected customer]** listing page.
2. Select another Invoice to View, Download, Print or Email, if required.
3. Click on the **Customers** icon to return to the **Customer Dashboard** (Customer Home page).
4. Click on the **CRM** icon to return to the **Dashboard** (Home page).

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Invoices for ABC SHoe Co'. Below this is a table with columns: Invoice No, Invoice Type, Reference, Invoice Value, Invoice Date, and Salesman Name. Two rows of data are visible. Callout 1 points to the heading, callout 2 to the first two invoice numbers, callout 3 to the navigation icons, and callout 4 to a refresh icon.

Invoice No	Invoice Type	Reference	Invoice Value	Invoice Date	Salesman Name
INV0000354	Parts	1234	2930.11	08 Jun 2017	Bianca Du Toit
INV0000405	Parts	test	402.50	20 Nov 2017	Bianca Du Toit

Page 1 of 1 (2 items) [1] [A]

Page size: 10

Create Filter

CRM.002.008

