

SALES

CUSTOMERS - INVOICES

The **Invoices** tile from the Customer Listing screen will allow you to Add, Edit, Comment and Reference, View and Print an Invoice.

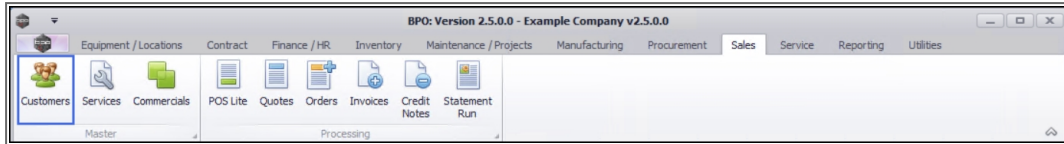
Sales Invoices may have been created from other screens within BPO (such as Calls or Projects), but all Sales Invoices created for the selected Customer will be listed here.

If a Sales Invoice is created from this screen without linking to a related project, call or work order, that invoice is classified as OTC (Over the Counter).

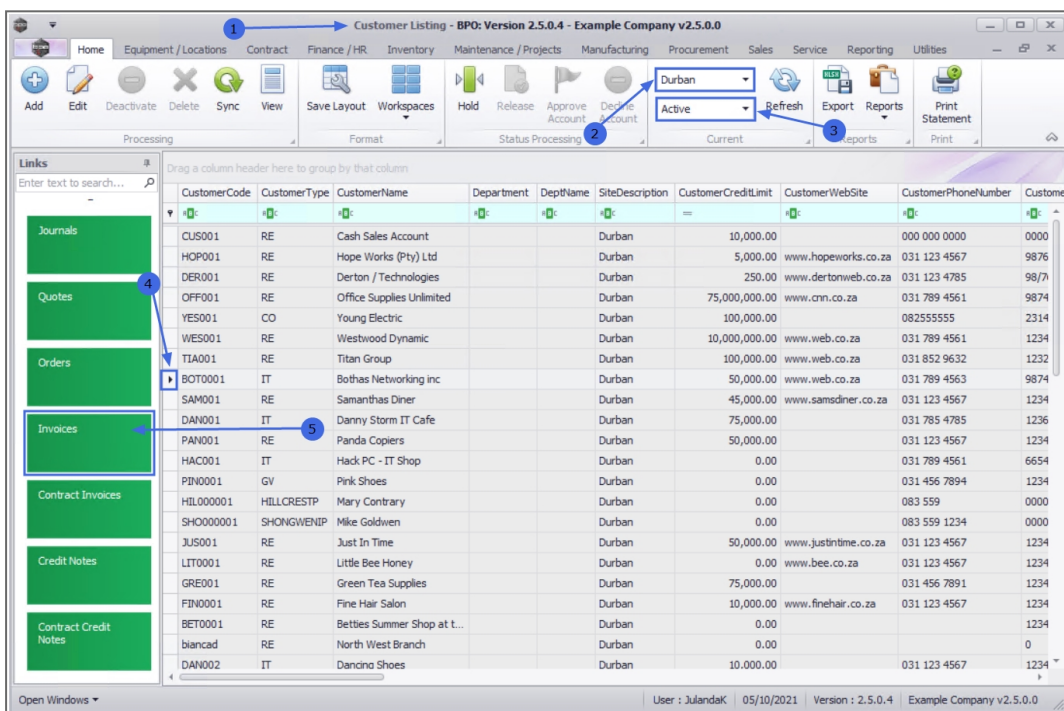
OTC (Over the Counter) Invoices are sales invoices that are created without going through the New Deal Sale process (and therefore the costs are not managed via Work In Progress). This is best used for a Shop Sale environment where a customer is invoiced before the stock or service is collected. This would be for a quick stock sale or internal service. Where delivery, third party services or time would be spent on work, installation or implementation, it is advised to rather follow a **New Deal Sale** process. A Sales Quote or Sales Order can be converted to a Sales Invoice, or a Sales Invoice can be created directly. Where stock is invoiced, a part request is created so that the stock can be issued to the invoice - its imperative to have strong controls in place to ensure that stock is issued by the store person. For a simplified OTC Invoicing process for stock items, see [POS Invoicing](#).

The Issues Functions tab will display stock that is issued to the invoice, where it is an OTC Invoice.

Ribbon Access: *Sales > Customers*



1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the customer.
 - The example has **Active** selected.
4. Select the **row** of the customer whose Invoices you wish to work with.
5. Click on the **Invoices** tile.



6. The **Sales Invoices for Customer [customer code]** screen will display.
7. The **Site** from the Customer Listing screen will not automatically pull through to the **Sales Invoices for Customer** screen, click on the down **arrow** to change the **Site** filter.

ADD SALES INVOICE

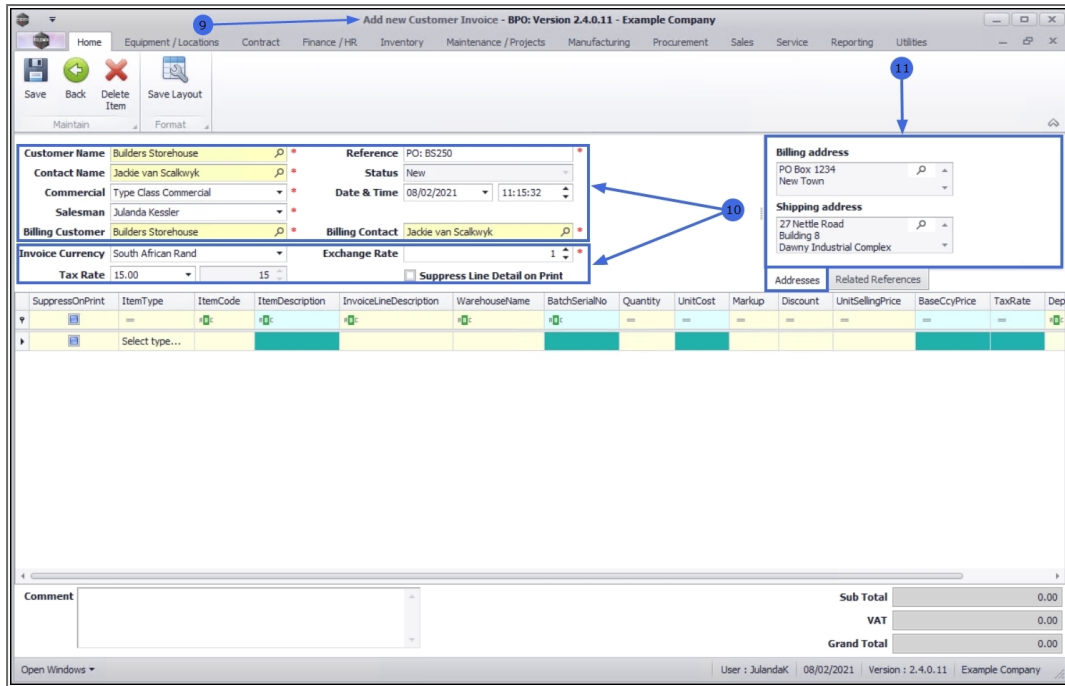
8. Click on **Add**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.

InvoiceNo	CustomerCode	CustomerName	DeptName	InvoiceDescription	InvoiceValue	InvoiceStat...	Currency	CrNotes	CrTotal	ExchangeRate
INV0000398	BOT0001	Bothas Networking I...		Swap out Invoice	4,560.00	New	ZAR		0.00	1.00
INV0000366	BOT0001	Bothas Networking I...		test	2,565.00	Printed	USD		0.00	1.00
INV0000298	BOT0001	Bothas Networking I...		1234	10,944.00	Printed	USD		0.00	10.00
INV0000296	BOT0001	Bothas Networking I...		1234	1,083.00	Printed	ZAR		0.00	1.00
INV0000295	BOT0001	Bothas Networking I...		frm order	1,083.00	Printed	ZAR		0.00	10.00
INV0000280	BOT0001	Bothas Networking I...		forest tests projec...	14.29	Printed	USD		0.00	10.00
INV0000279	BOT0001	Bothas Networking I...		1234	4,363.18	Printed	USD		0.00	10.00
INV0000276	BOT0001	Bothas Networking I...		forest tests projec...	136.23	Printed	USD		0.00	10.00
INV0000275	BOT0001	Bothas Networking I...		forex tests	102.79	Printed	USD		0.00	10.00
INV0000274	BOT0001	Bothas Networking I...		forex tests	116.83	Printed	USD		0.00	10.00
INV0000273	BOT0001	Bothas Networking I...		test forex with tax	147.63	Printed	USD		0.00	10.00
INV0000188	BOT0001	Bothas Networking I...		test	287.30	Printed	ZAR		0.00	1.00
INV0000109	BOT0001	Bothas Networking I...		test	517.49	Printed	ZAR		0.00	1.00
INV0000056	BOT0001	Bothas Networking I...		OR 12 - Additional ...	34,855.00	Printed	ZAR	CN0000066 (N)	38,162.50	1.00
INV0000055	BOT0001	Bothas Networking I...		test	38,940.38	Printed	ZAR		0.00	1.00
INV0000047	BOT0001	Bothas Networking I...		OR 654789	17,100.50	Printed	ZAR		0.00	1.00

9. " The Add new Customer Invoice screen will display. " on page 2
10. Complete the **Sales Invoice Header** and the **Financial Header** information.
11. Confirm the **Billing and Shipping Addresses**, if these fields were not populated when you entered the Header information.



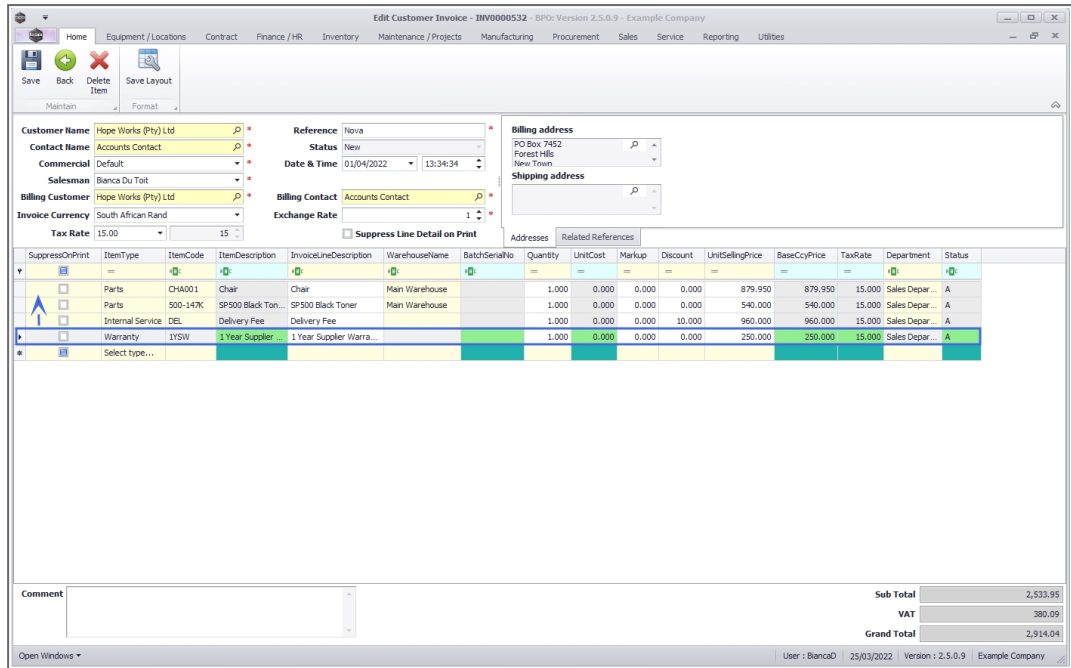
12. Click on the **Related References** tab to enter the reference information for the Customer Order.

- When referencing a call or work order which has stock issued, but no invoice was created, these items will auto populate.

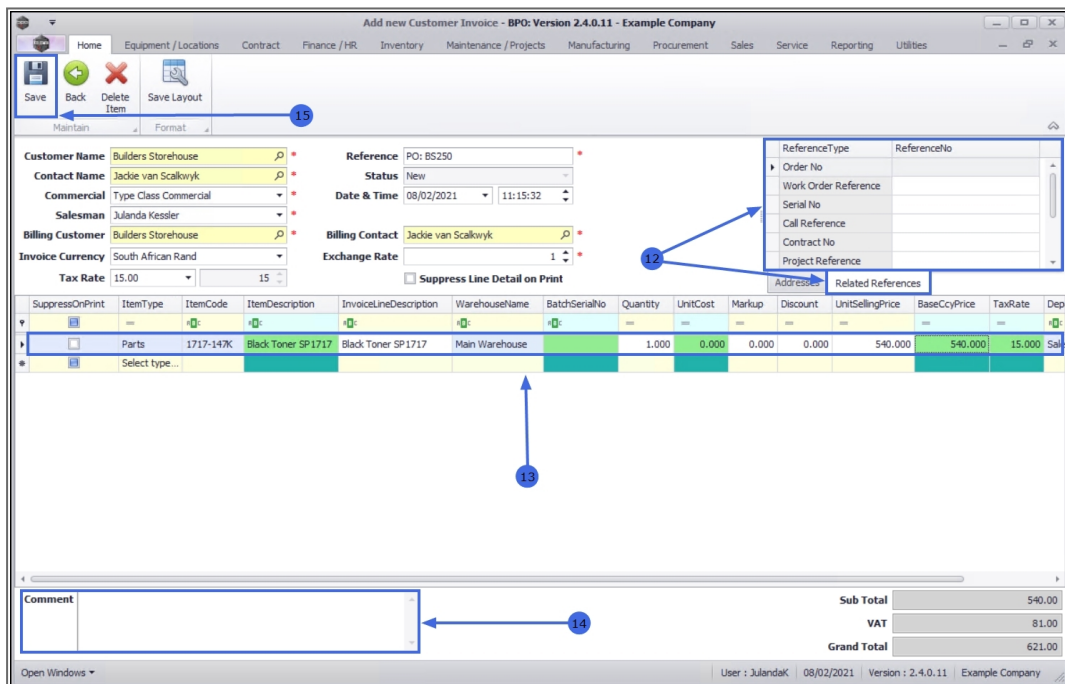
13. Add the **Items to be Invoiced** as required.

14.

- Drag and drop rows to set the order you wish the items to be displayed on the sales invoice. This order will directly be pulled into the printed invoice when generated.



- Click in the **Comments** text box to type in a comment related to the invoice.
- Click **Save** to save the Customer Invoice details.



16. The **Sales Invoices for Customer** listing screen will be updated with the **new** Invoice that you have created.



For a detailed handling of this topic refer to [Invoices - Create Sales Invoice \(OTC\)](#)

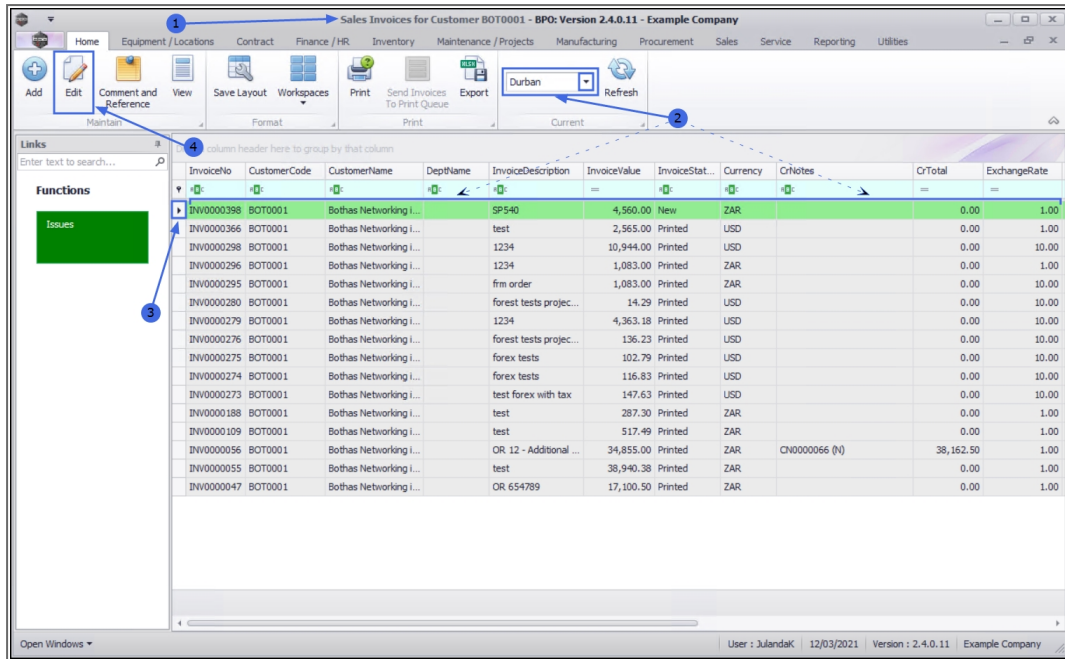
InvoiceNo	CustomerCode	CustomerName	DepName	InvoiceDescription	InvoiceValue	InvoiceStat	Currency	OItems	OTotal	ExchangeRate
INV0000398	BOT0001	Bothas Networking I...		Swap out Invoice	4,560.00	New	ZAR	0.00	0.00	1.00
INV0000398	BOT0001	Bothas Networking I...		test	2,565.00	Printed	USD		0.00	1.00
INV0000298	BOT0001	Bothas Networking I...		1234	10,944.00	Printed	USD		0.00	10.00
INV0000296	BOT0001	Bothas Networking I...		1234	1,083.00	Printed	ZAR		0.00	1.00
INV0000295	BOT0001	Bothas Networking I...		fix order	1,083.00	Printed	ZAR		0.00	10.00
INV0000280	BOT0001	Bothas Networking I...		forest tests projec...	14.29	Printed	USD		0.00	10.00
INV0000279	BOT0001	Bothas Networking I...		1234	4,363.58	Printed	USD		0.00	10.00
INV0000276	BOT0001	Bothas Networking I...		forest tests projec...	136.23	Printed	USD		0.00	10.00
INV0000275	BOT0001	Bothas Networking I...		forex tests	102.79	Printed	USD		0.00	10.00
INV0000274	BOT0001	Bothas Networking I...		forex tests	116.83	Printed	USD		0.00	10.00
INV0000273	BOT0001	Bothas Networking I...		test forex with tax	147.63	Printed	USD		0.00	10.00
INV0000188	BOT0001	Bothas Networking I...		test	267.30	Printed	ZAR		0.00	1.00
INV0000109	BOT0001	Bothas Networking I...		test	517.40	Printed	ZAR		0.00	1.00
INV0000056	BOT0001	Bothas Networking I...		OK 12 - Additional ...	34,855.00	Printed	ZAR	CH000006 (0)	38,162.50	1.00
INV0000055	BOT0001	Bothas Networking I...		test	38,940.30	Printed	ZAR		0.00	1.00
INV0000047	BOT0001	Bothas Networking I...		OK 654769	17,100.50	Printed	ZAR		0.00	1.00

EDIT SALES INVOICE

1. From the **Sales Invoices for Customer** [customer code] screen,
2. Ensure that the correct **Site** has been selected, by clicking on the **arrow** to change the **Site** filter.
 - The **Sales Invoices for Customer** listing screen will be updated with the Customer Invoices for the selected site.
3. Select the **row** of the Invoice you wish to edit.
4. Click on **Edit**.



Short cut key: **Right click** to display the Process**All groups** menu list. Click on **Edit**.



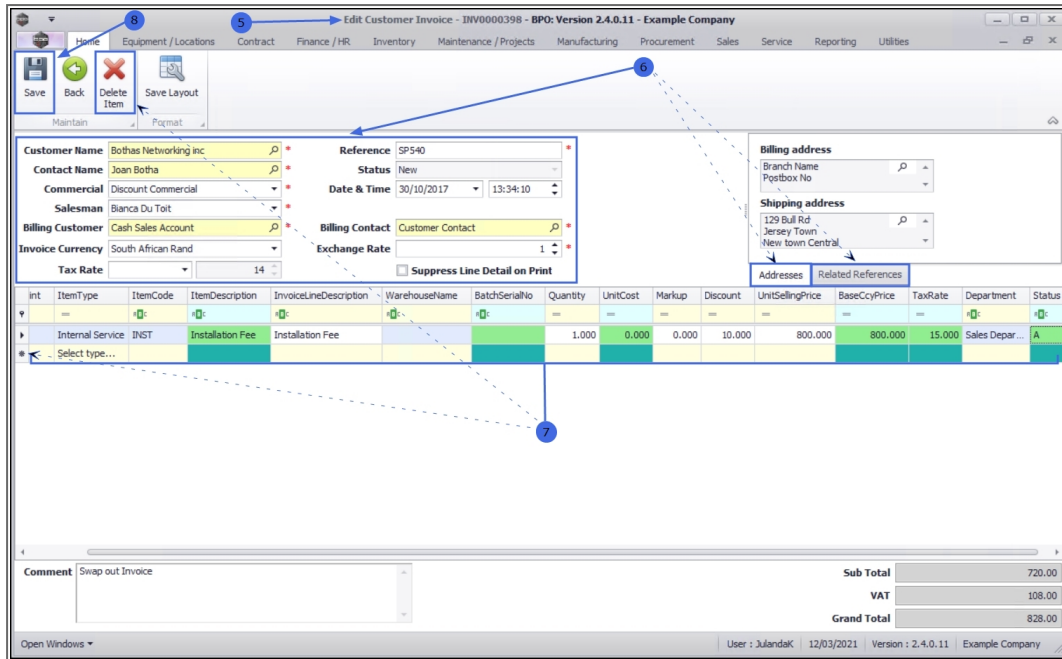
5. " The Edit Customer Invoice - [invoice number] screen will display. " on page 2
6. You can make changes to the **Heading Information, Addresses** or **Related References** tabs.
7. Make the required changes to the Invoice Item frame.
 - To **Add** a new Invoice item, click on the Select type text box of the first available item line.
 - To remove an item, click on the **row** of the item you wish to remove and click on **Delete Item**.
 - Drag and drop rows to set the order you wish the items to be displayed on the sales invoice. This order will directly be pulled into the printed

invoice when generated.

8. Click on **Save**.



For a detailed handling of this topic refer to [Invoices - Edit Sales Invoice](#)



You will return to the updated *Sales Invoices for Customer* listing screen.

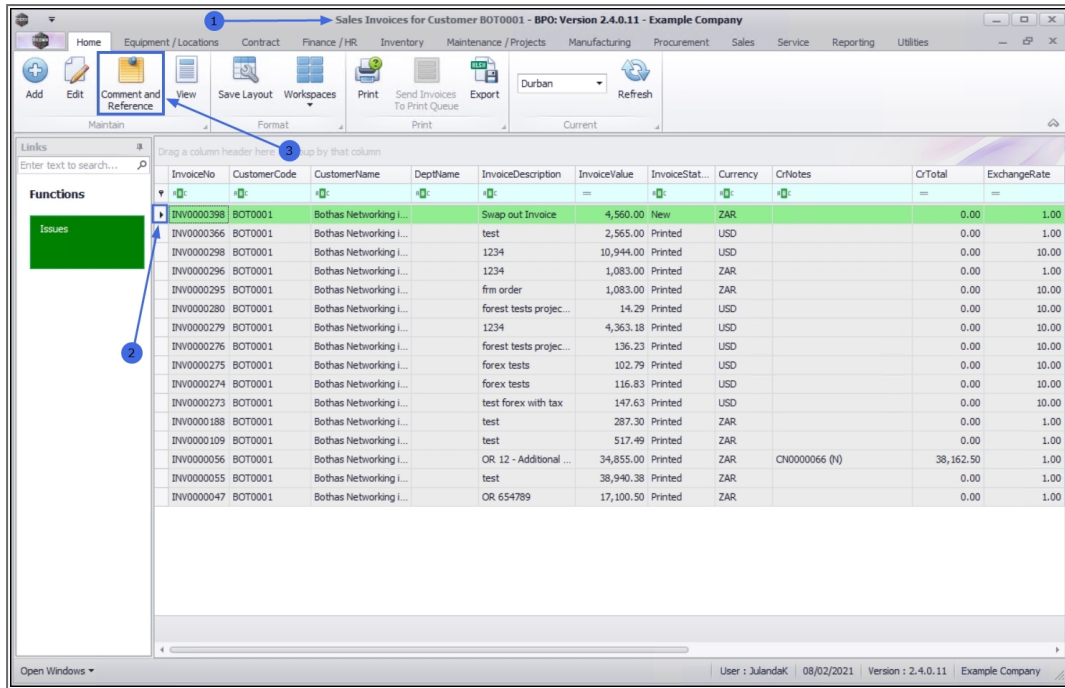
COMMENT AND REFERENCE

You will be able to add or view the Comment and Reference information for the Customer Invoice from the Customer Listing Screen.

1. From the *Sales Invoices for Customer [customer code]* screen,
2. Select the **row** of the Invoice you wish to add or view the Comment and Reference information for.
3. Click on **Comment and Reference**.

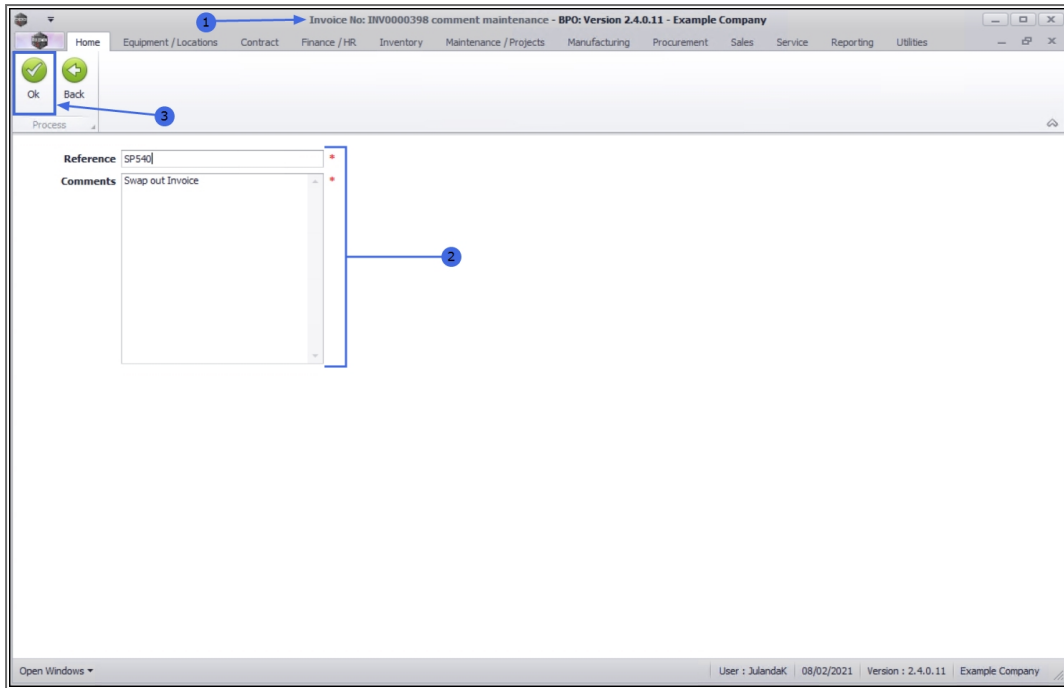


Short cut key: **Right click** to display the *Process* menu list. Click on **Comment and Reference**.



4. "The Invoice No. [invoice number] comment maintenance screen will display." on page 2 The **Invoice No: INV[invoice number] comment maintenance** screen will display.
5. Make the necessary changes or add the required information to the Reference or Comment fields.
6. Click **OK** to update the Invoice information and to return to the **Sales Invoice for Customer** listing screen.

For a detailed handling of this topic refer to [Invoices - Comment and References](#)

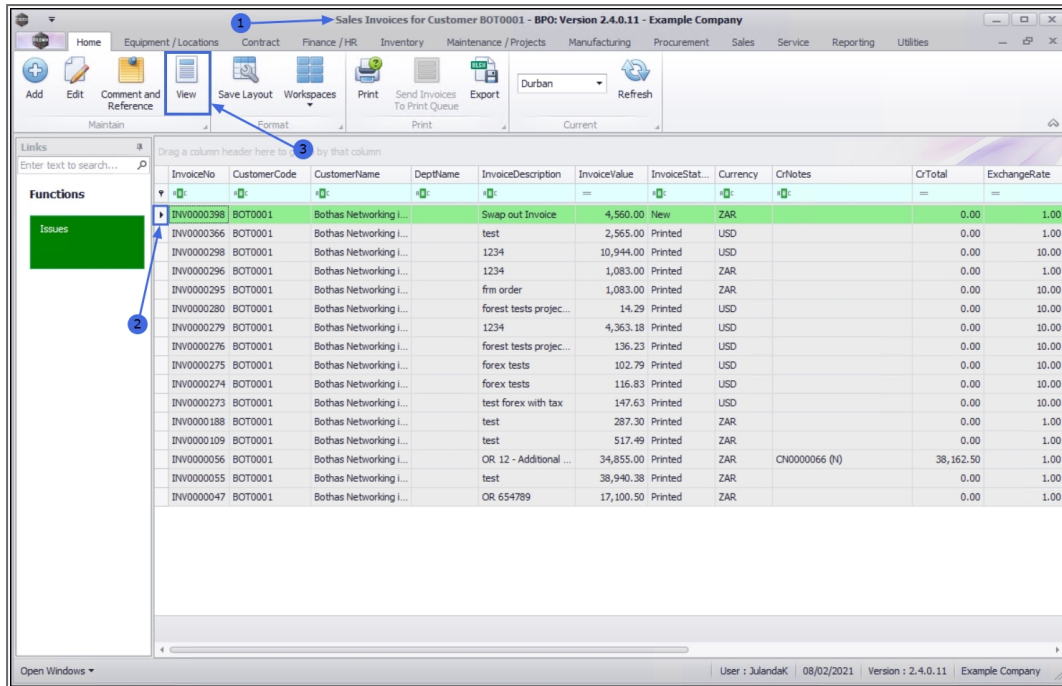


VIEW CUSTOMER INVOICE



You will only be able to view and print the Invoice, no changes can be made in the **View** screen.

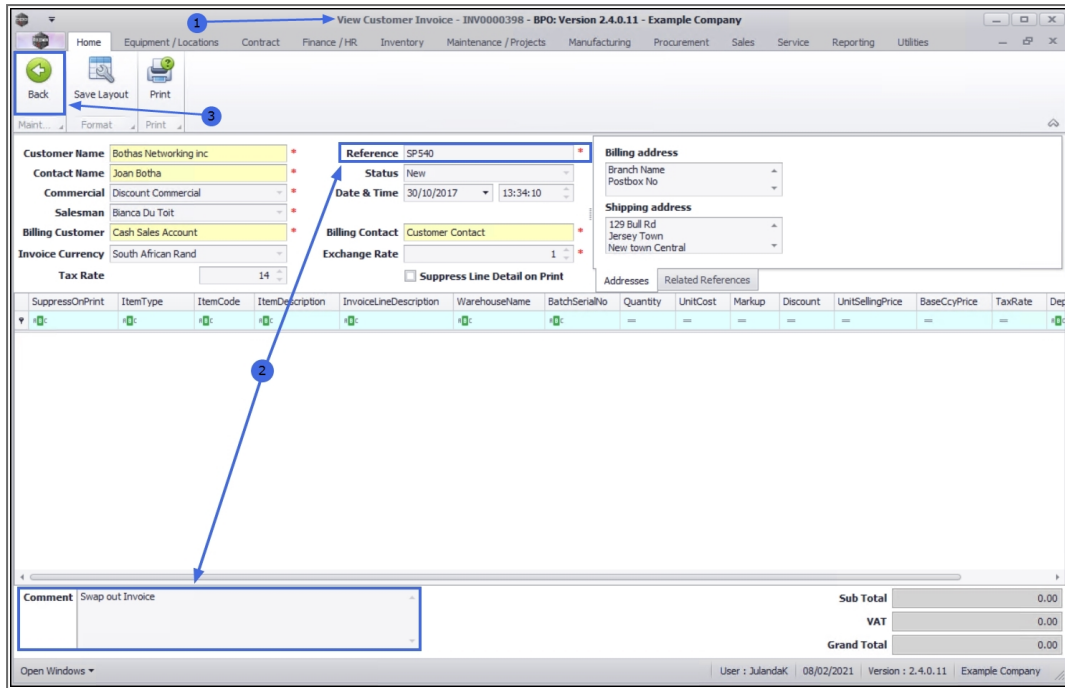
1. From the **Sales Invoices for Customer [customer code]** listing screen,
2. Select the **row** of the Invoice you wish to view.
3. Click on **View**.



4. The **View Customer Invoice - [invoice number]** screen will display.
5. Note the **Comment and Reference Number** fields have been updated with the changes made, using the **Comment and Reference** button.
6. Click on **Back** to return to the **Sales Invoice for Customer** listing screen.



For a detailed handling of this topic refer to [View Tax Invoice](#)



PRINT INVOICE



You will be able to *Print Invoice*, *Email Invoice* or *Print and Email* the Sales Invoice from the *Sales Invoices for Customer* listing screen or the *View Customer Invoice* screen.

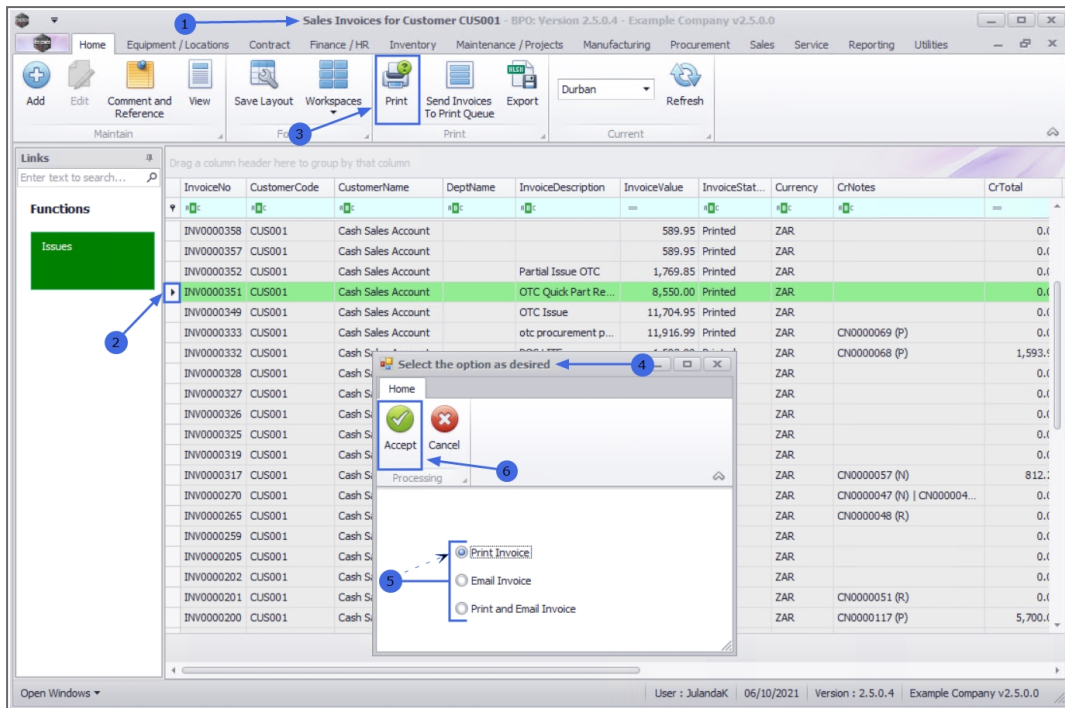
1. From the *Sales Invoices for Customer [customer code]* screen,
2. Click on the **row** of the Invoice you wish to print.
3. Click on **Print**.
4. The **Select the option as desired message** will display.
5. Click on the **radio button** of the option you require.



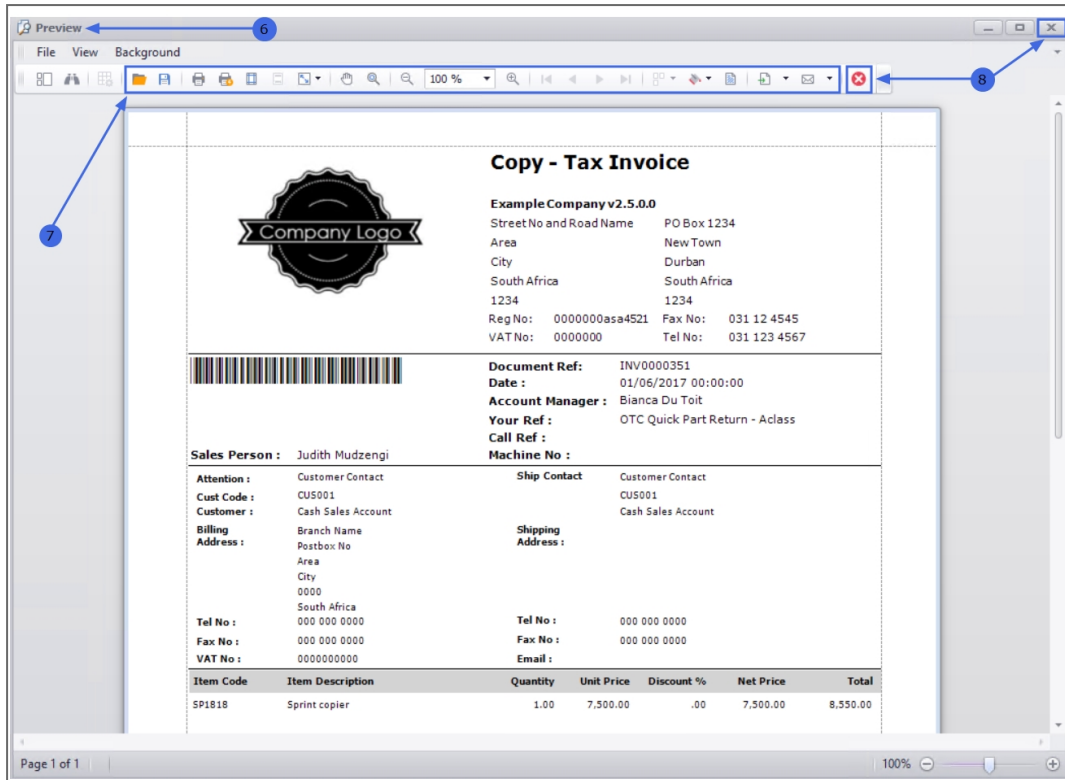
Selecting the *Email Invoice*, will email the invoice via the *BPO Email Service* on the server and not from MS Outlook.

- The example has **Print Invoice** selected.

6. Click on **Accept**.



6. The Tax Invoice will display in the **Preview** screen.
7. From here you can make cosmetic changes to the document, as well as **Save, Print, Add a Watermark, Export** or **Email** the Invoice.
8. Click on **Close** to return to the **Sales Invoices for Customer** screen.




Refer to [Proforma Invoice](#) and [Printing a Sales Invoice](#) for a detailed handling of the functions.

SEND INVOICES TO PRINT QUEUE

You can send Invoices to the Print Queue directly from the *Sales Invoices for Customer [customer code]* listing screen, instead of going to the Print Queue Reprint screen. This means that a batch of invoices can be send to the customer.

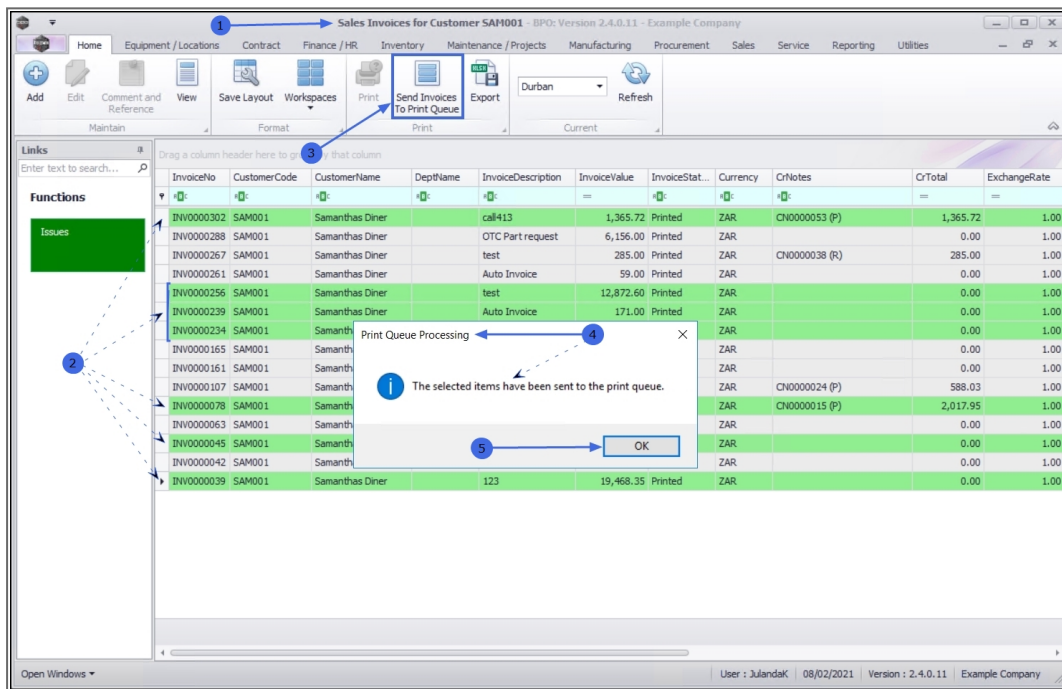
Print Queue is only available where the status is set to Printed.

1. From the *Sales Invoices for Customer [customer code]*,
2. Select the Invoice(s) you wish to send to the Print Queue.
 -  **To select a range of invoices:** Click on the **row** of the **first Invoice**. Hold down the **Shift key** on your keyboard

and click on the **row** of the **last invoice** in your list.

- **To select alternate invoices:** Hold down the **Ctrl (Control) key** on your keyboard and click on the **row** of each Invoice you wish to include in the selection.
3. Click on **Send Invoices to Print Queue**.
 4. When you receive the **Print Queue Processing** message to confirm that;
 - **The selected items have been sent to the print queue.**
 5. Click on **OK**.

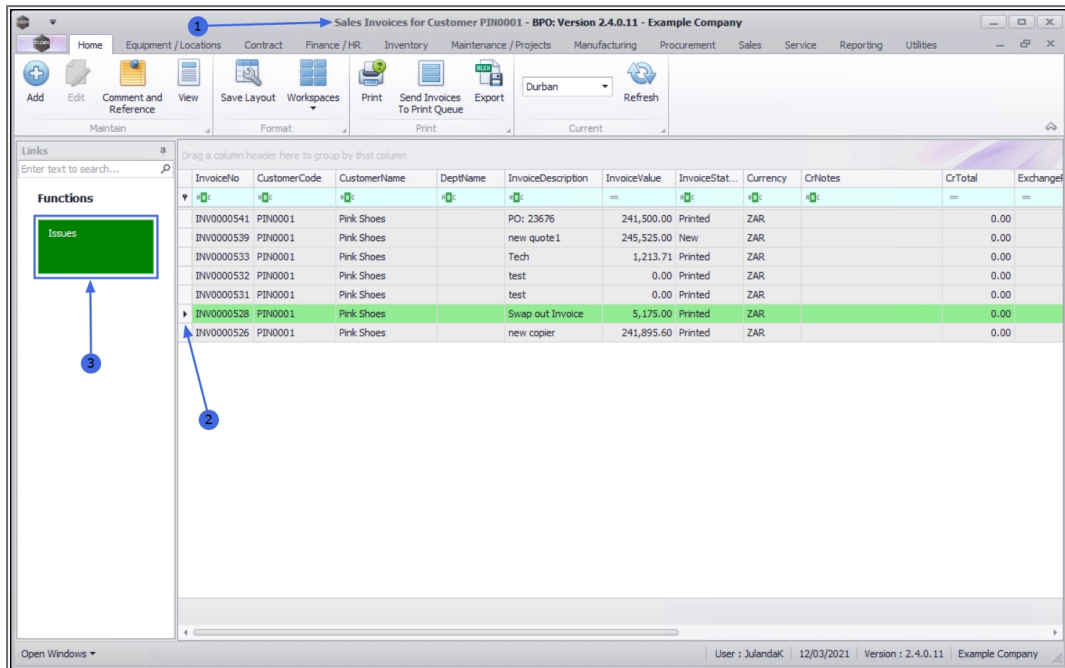
For a detailed handling of this topic refer to [Invoices - Send Invoices To Print Queue](#)



ISSUES TILE

1. From the **Sales Invoices for Customer [customer code]** listing screen, you can view the stock issued for a selected Invoice.

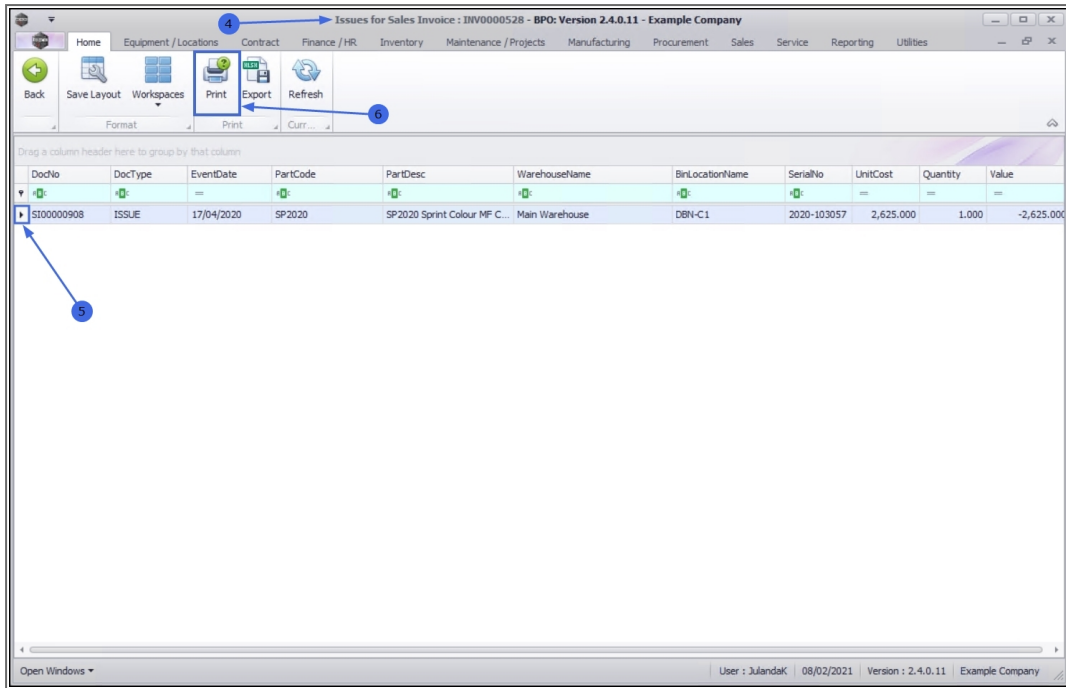
2. Click on the **row** of the Invoice you wish to view the linked **issued items**.
3. Click on the **Issues** tile.



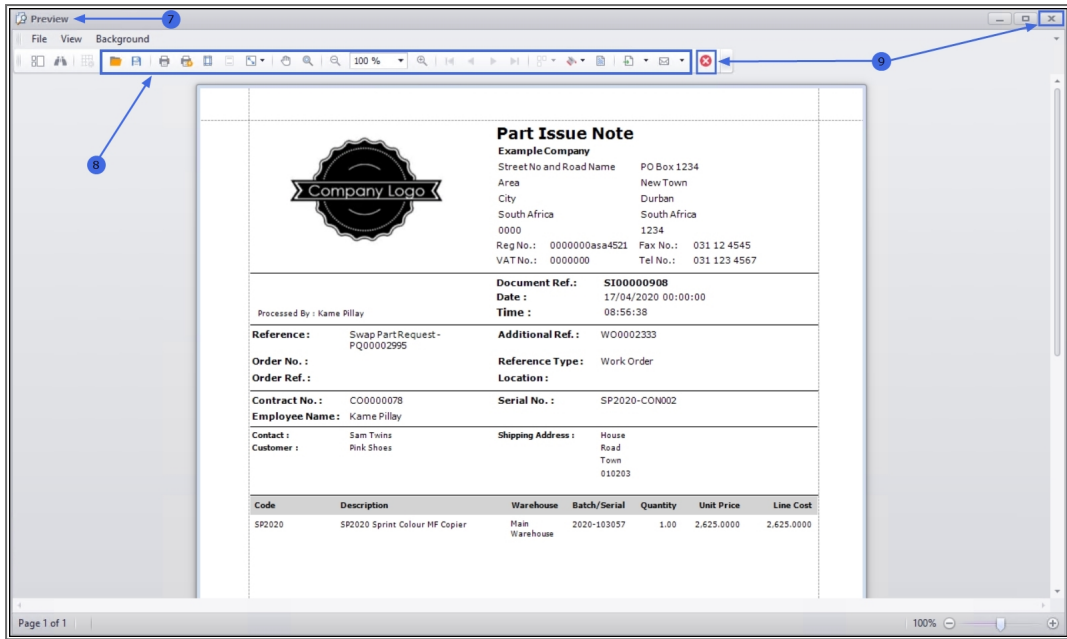
4. The **Issues for Sales Invoice: INV[invoice number]** listing screen will display.

Print Part Issue Note

5. Click on the **row** of the Part Issue Note you wish to print.
6. Click on **Print**.



7. The **Part Issue Note** for the Sales Invoice will display in the Preview screen.
8. From here you can make cosmetic changes to the document, as well as **Save, Print, Add a Watermark, Export** or **Email** the Part Issue Note.
9. Click **Close** to return to the **Issues for Sales Invoice** screen.



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