

# SERVICE

## CALLS - INVOICE A CALL

**Note** that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility<sup>1</sup>. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the [Call Centre Mode](#) notes.

When Call Invoices are raised, remember the following:

Parts, Labour, Sub-Contracts and Expenses must be logged against the call **before** invoicing. These items **cannot** be added to the invoice.

Internal Services, Travel and Warranties **can** be added to the invoice.

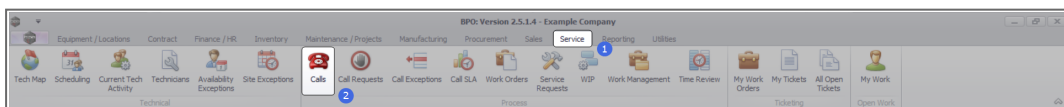
The invoice must be **printed** in order for the transaction to post to Pastel.

The first time an invoice is printed, it will state: **Tax Invoice**. Each time thereafter, it will state **Copy-Tax Invoice**.



If you need to re-print an original Tax Invoice due to a network connection issue, etc. then you will need to use the [Print Queue Reprint](#) functionality.

**Ribbon** Select *Service > Calls*



- The **Call Listing** screen will be displayed.

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<sup>1</sup>BPO2 v2.5.1.3 or higher

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	Error Code	Error Code Desc	SerialNo	ChkLocationSubject	Priority
EN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	02:09:10	Test account balances	CR	Change Request			107		3
EN0001002	Salematic Driver	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual.	SR	Select Call Type			19-12/202		3
EN0001001	Young Electric	20/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			en123		3
EN0000996	Hope Works (Pty) Ltd	24/10/2022	Unassigned		13:11:11	Printer/Barcode	IGR	New/Def Rental				BPQZ TEST 1	3
EN0000992	Top Vehicle Hire	20/10/2022	Awaiting Acceptance	Daniel Belgoven	14:55:17	Loan machine for temporary high volume printing requirement	SERV	Service			TOP1234567		3
EN0000991	Asda Java Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000054	SR	Select Call Type					3
EN0000989	Deton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
EN0000988	Young Electric	13/04/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	en123		3
EN0000987	Young Electric	06/04/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			en123		3
EN0000986	Young Electric	07/04/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			en123		3
EN0000985	Hope Works (Pty) Ltd	08/04/2022	Unassigned		06:00:00	Test future call - for elapsed time	UPG	Upgrade			20-98765		3
EN0000984	Hope Works (Pty) Ltd	08/04/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			AT2000000		3
EN0000983	Hope Works (Pty) Ltd	08/04/2022	Unassigned		06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
EN0000982	Young Electric	18/04/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			en123		3
EN0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with our message email entered	ACM	Administration			107		3
EN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	Test another call email	ACM	Administration			095010155		3
EN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			095010155		3
EN0000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
EN0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000964	Hed POC - IT Shop	20/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
EN0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		2
EN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	Error Code	Error Code Desc	SerialNo	ChkLocationSubject	Priority
EN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	02:09:10	Test account balances	CR	Change Request			107		3
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EN0000996	Hope Works (Pty) Ltd	24/10/2022	Unassigned		13:11:11	Printer/Barcode	IGR	New/Def Rental				BPQZ TEST 1	3
EN0000992	Top Vehicle Hire	20/10/2022	Awaiting Acceptance	Daniel Belgoven	14:55:17	Loan machine for temporary high volume printing requirement	SERV	Service			TOP1234567		3
EN0000991	Asda Java Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000054	SR	Select Call Type					3
EN0000989	Deton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
EN0000988	Young Electric	13/04/2022	Unassigned		06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	en123		3
EN0000987	Young Electric	06/04/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			en123		3
EN0000986	Young Electric	07/04/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			en123		3
EN0000985	Hope Works (Pty) Ltd	08/04/2022	Unassigned		06:00:00	Test future call - for elapsed time	UPG	Upgrade			20-98765		3
EN0000984	Hope Works (Pty) Ltd	08/04/2022	Unassigned		06:00:00	Test elapsed hours - 2 days prior	TEST	Testing			AT2000000		3
EN0000983	Hope Works (Pty) Ltd	08/04/2022	Unassigned		06:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
EN0000982	Young Electric	18/04/2022	Unassigned		06:00:00	Test elapsed hours 1	TEST	Testing			en123		3
EN0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with our message email entered	ACM	Administration			107		3
EN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	Test another call email	ACM	Administration			095010155		3
EN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			095010155		3
EN0000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
EN0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000965	Westwood Dynamic	02/11/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000964	Hed POC - IT Shop	20/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
EN0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		2
EN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
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EN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubBtMant - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - HbWest	2
EN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

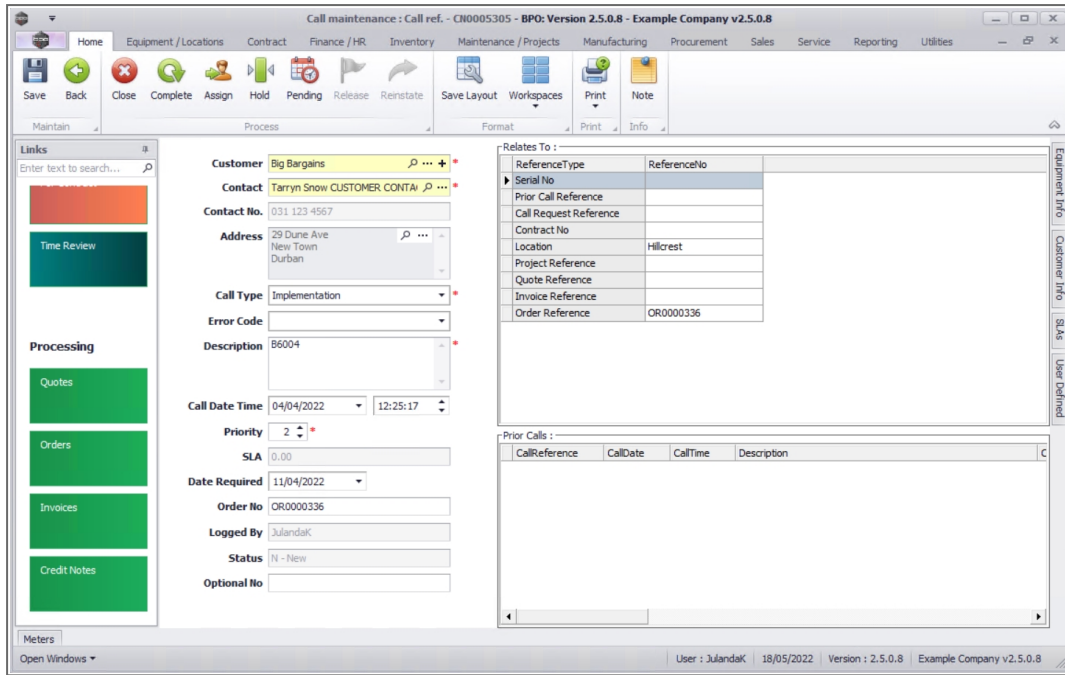
- Select the **Call** you wish to work with.

CallReference	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH001003	Young Electric	13/02/2022	09:00:00	Awaiting Acceptance - Ann Hilson	Test account balance	CR	Change Request			107		3
BN CH001002	Silverleaf Drive	12/02/2022	06:38:20	Awaiting Acceptance - Nery Thompson	Test call for account balance manual	DR	Select Call Type			107		3
BN CH001001	Young Electric	20/11/2022	11:29:19	Unassigned	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000999	Hope Works (Pty) Ltd	20/06/2022	06:00:00	Unassigned	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123	BPQZ TEST 1	3
BN CH000992	Top Vehicle Hire	20/06/2022	14:58:17	Awaiting Acceptance - Daniel Edgewood	Loan machine for temporary high volume printing requirement	SRV	Service			TOP123456		3
BN CH000991	Aplic. Ltda Inc	04/02/2022	05:36:15	Unassigned	Contact Closure - C0000055	DR	Select Call Type					3
BN CH000989	Derton / Technologies	13/06/2022	09:00:00	Unassigned	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BN CH000988	Young Electric	02/06/2022	06:00:00	Unassigned	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration			3
BN CH000987	Young Electric	06/06/2022	06:00:00	Unassigned	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
BN CH000986	Young Electric	07/06/2022	06:00:00	Unassigned	Call logged 3 days ago for elapse time checks	DR	Select Call Type			an123		3
BN CH000985	Hope Works (Pty) Ltd	18/06/2022	05:09:13	Unassigned	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000984	Hope Works (Pty) Ltd	06/06/2022	06:00:00	Unassigned	Test elapsed hours - 2 day prior	TEST	Testing			47200000		3
BN CH000983	Hope Works (Pty) Ltd	06/06/2022	06:00:00	Unassigned	Test elapsed time 2 - day prior	TEST	Testing			SN234123456		3
BN CH000982	Young Electric	18/06/2022	06:00:00	Unassigned	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000981	Young Electric	18/11/2019	13:24:29	Awaiting Acceptance - Bianca Du Toit	Test with site manager email entered	ADM	Administration			107		3
BN CH000979	Hope Works (Pty) Ltd	18/11/2019	06:30:20	Awaiting Acceptance - Bianca Du Toit	Test another call email	ADM	Administration			0950191015		3
BN CH000978	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Awaiting Acceptance - Bianca Du Toit	Test new call for email description in body	CR	Change Request			0950191015		3
BN CH000977	Westwood Dynamic	29/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000976	Westwood Dynamic	22/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000969	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Unassigned	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000968	Green Tea Supplies	16/11/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000967	Westwood Dynamic	15/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000966	Westwood Dynamic	08/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000965	Westwood Dynamic	02/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000964	HOCK PC - IT Shop	26/10/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CH000963	Westwood Dynamic	21/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Unassigned	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000960	Westwood Dynamic	18/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000959	Westwood Dynamic	11/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000958	Westwood Dynamic	04/10/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
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BN CH000956	Westwood Dynamic	20/09/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Unassigned	Tier - Commercial Tier Test	INST	Installation				Checkers Centre - Hilo-test	2
BN CH000954	Green Tea Supplies	17/09/2019	08:00:00	Unassigned	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- Click on the **Edit** button.

CallReference	CustomerName	CallDate	CallTime	Technician	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH001003	Young Electric	13/02/2022	09:00:00	Awaiting Acceptance - Ann Hilson	Test account balance	CR	Change Request			107		3
BN CH001002	Silverleaf Drive	12/02/2022	06:38:20	Awaiting Acceptance - Nery Thompson	Test call for account balance manual	DR	Select Call Type			107		3
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BN CH000996	Hope Works (Pty) Ltd	20/06/2022	10:00:00	Unassigned	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123	BPQZ TEST 1	3
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BN CH000988	Young Electric	02/06/2022	06:00:00	Unassigned	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration			3
BN CH000987	Young Electric	06/06/2022	06:00:00	Unassigned	Call logged 4 days ago for elapse time checks	LPG	Upgrade			an123		3
BN CH000986	Young Electric	07/06/2022	06:00:00	Unassigned	Call logged 3 days ago for elapse time checks	DR	Select Call Type			an123		3
BN CH000985	Hope Works (Pty) Ltd	18/06/2022	05:09:13	Unassigned	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
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BN CH000982	Young Electric	18/06/2022	06:00:00	Unassigned	Test elapsed hours 1	TEST	Testing			an123		3
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BN CH000966	Westwood Dynamic	08/11/2019	08:00:00	Unassigned	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
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- The **Call maintenance : Call ref. - [call number]** screen will be displayed.
- Click on the **Invoices** tile.



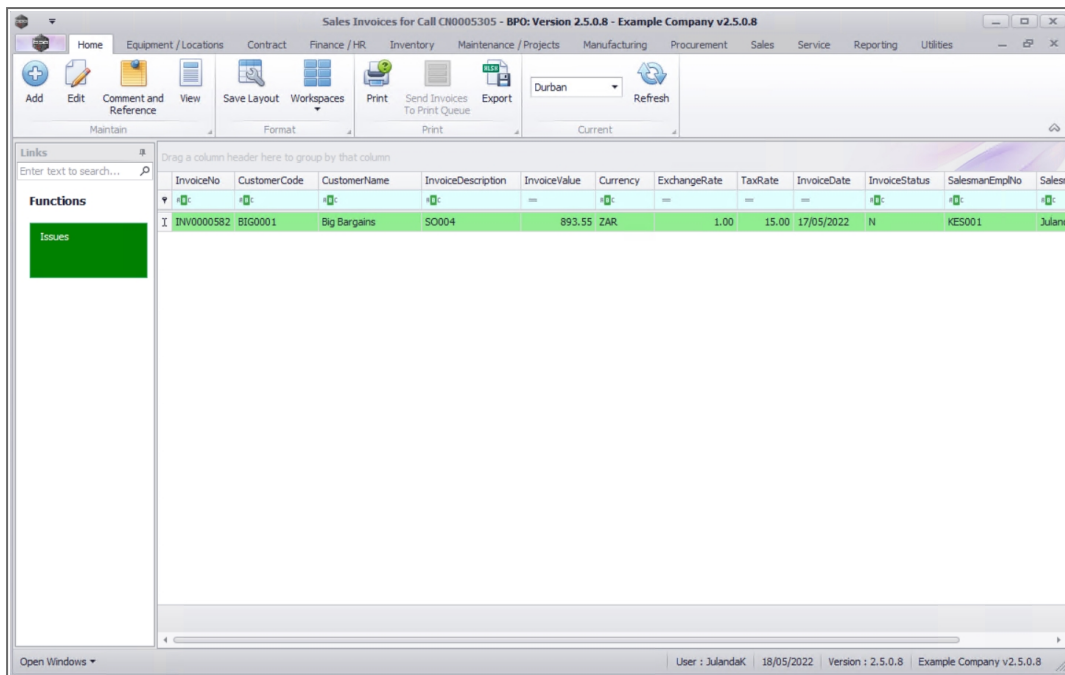
- The **Sales Invoices for Call** [call number] screen will be displayed.
- Any invoices that have already been issued against the work order, will display.

## ADD INVOICE

- Click on **Add**.



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



InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanEmpNo	SalesmanName
INV000582	BIG0001	Big Bargains	SO004	893.55	ZAR	1.00	15.00	17/05/2022	N	KES001	JulandK

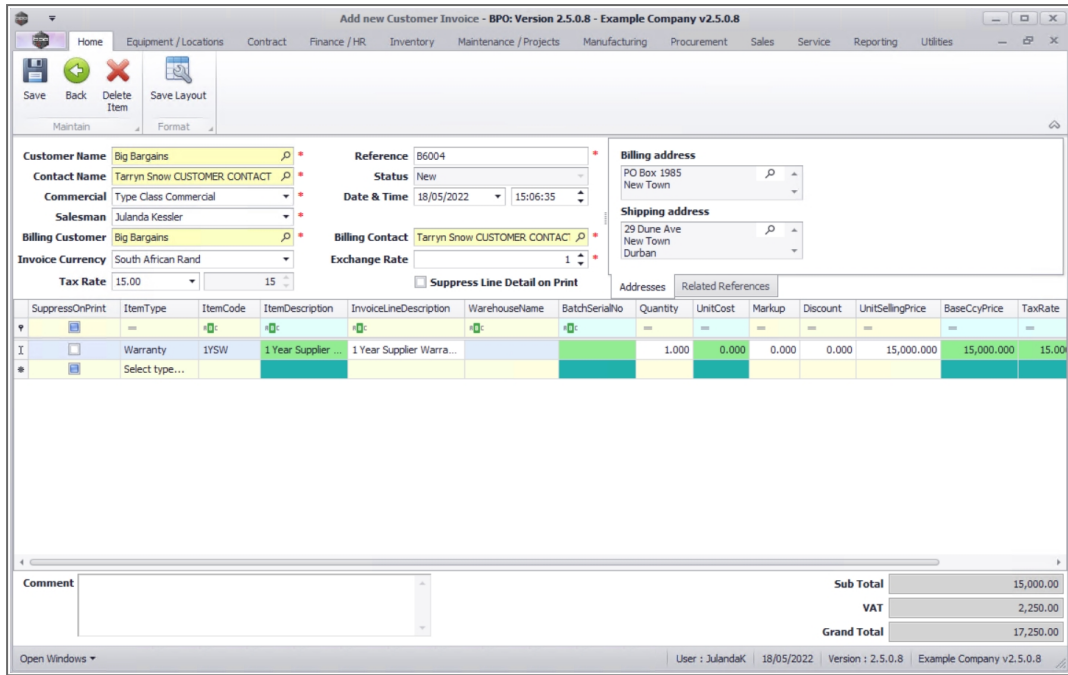
- " The Add new Customer Invoice screen will display. " on page 2
- Complete the **Sales Invoice Header** and the **Financial Header** information.
- Confirm the **Billing and Shipping Addresses**, of these fields were not populated when you entered the Header information.



### Remember:

- *Parts, Labour, Sub-Contracts* and *Expenses* must be logged against the call **before** invoicing. These items **cannot** be added to the invoice.

- *Internal Services, Travel* and *Warranties* **can** be added to the invoice.



- Click on the Related References tab to enter the reference information for the Customer Invoice.
- The Call Reference has been auto populated with the Call Ref number selected.
- Edit the Items to be Invoiced
  - 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 on the Comments text box to type in a comment related to the Invoice.
- Click on **Save** to save the Customer Invoice details.



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

Add new Customer Invoice - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout

Customer Name: Big Bargains  
 Contact Name: Tarryn Snow CUSTOMER CONTACT  
 Commercial: Type Class Commercial  
 Salesman: Julanda Kessler  
 Billing Customer: Big Bargains  
 Invoice Currency: South African Rand  
 Tax Rate: 15.00

Reference: B6004  
 Status: New  
 Date & Time: 18/05/2022 15:06:35  
 Billing Contact: Tarryn Snow CUSTOMER CONTACT  
 Exchange Rate: 1

ReferenceType: Order No, Work Order Reference, Serial No, Call Reference: CN0005305, Contract No, Project Reference

SuppressOnPrint	ItemType	ItemCode	ItemDescription	InvoiceLineDescription	WarehouseName	BatchSerialNo	Quantity	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate
	Warranty	1YSW	1 Year Supplier	1 Year Supplier Warra...			1.000	0.000	0.000	0.000	15,000.000	15,000.000	15.00

Sub Total: 15,000.00  
 VAT: 2,250.00  
 Grand Total: 17,250.00

User: JulandaK | 18/05/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

## INVOICE LISTING

- The Sales Invoices for Call screen will be updated with the new invoice you have created.

Sales Invoices for Call CN0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Comment and Reference | View | Save Layout | Workspaces | Print | Send Invoices To Print Queue | Export


Links: Enter text to search...  
 Functions: Issues

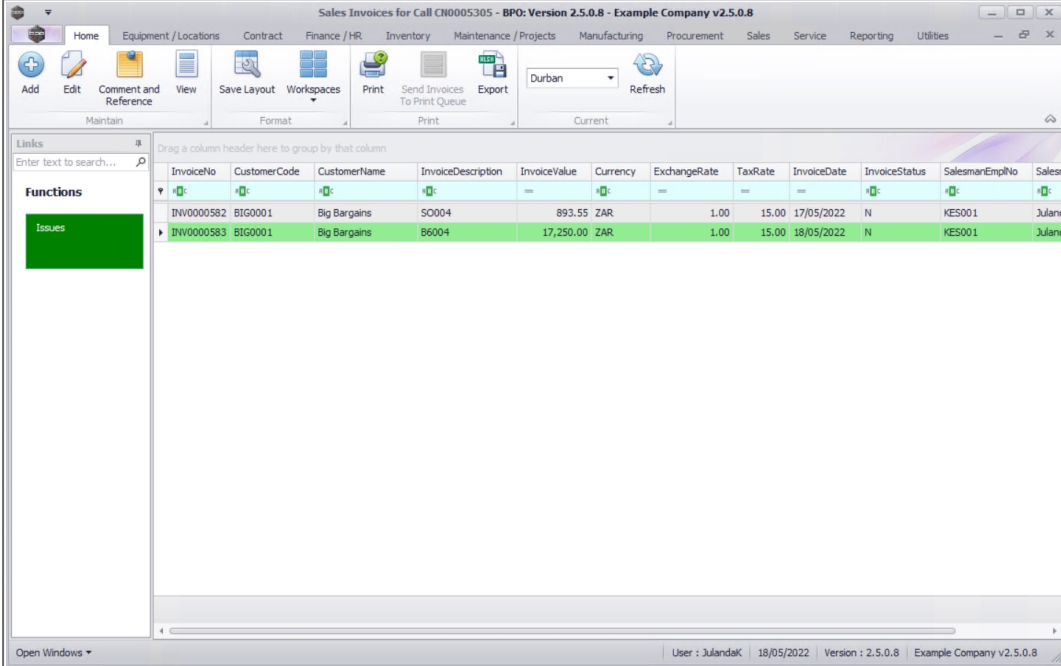
InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanEmpNo	Sales
INV0000582	BIG0001	Big Bargains	SO004	893.55	ZAR	1.00	15.00	17/05/2022	N	KES001	Juland
INV0000583	BIG0001	Big Bargains	B6004	17,250.00	ZAR	1.00	15.00	18/05/2022	N	KES001	Juland

User: JulandaK | 18/05/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

## EDIT INVOICE

- From the *Sales Invoices for Call [call number]* screen,
- Click on the **row** of the invoice you wish to edit.
- Click on **Edit**.

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



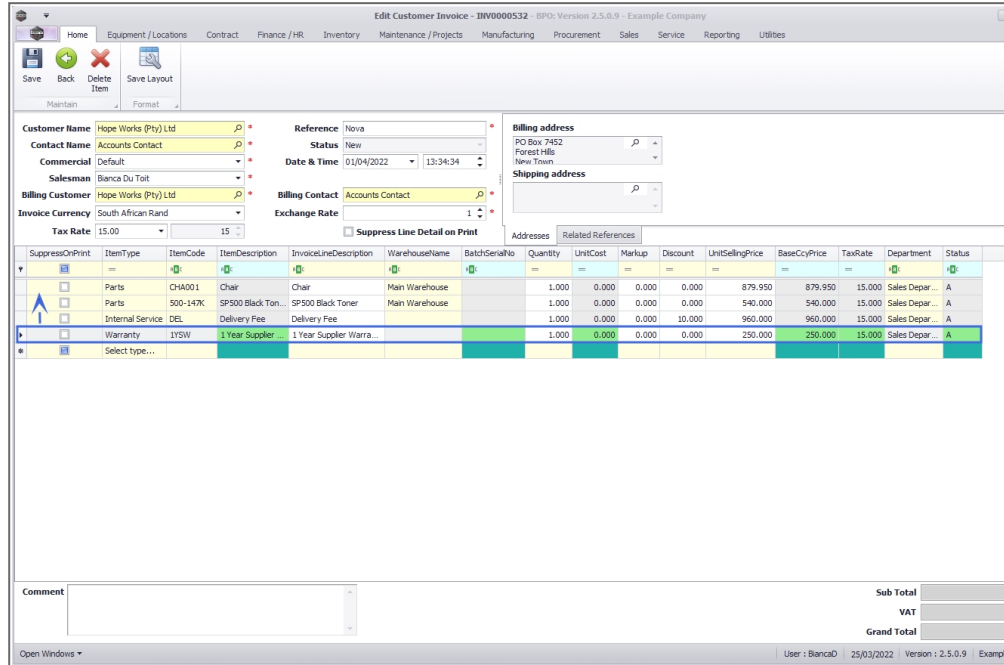
The screenshot shows a software window titled "Sales Invoices for Call CN0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8". The interface includes a menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar is a toolbar with icons for Add, Edit, Comment and Reference, View, Save Layout, Workspaces, Print, Send Invoices To Print Queue, and Export. A dropdown menu is set to "Durban" and a "Refresh" button is visible. The main area contains a table with the following data:

InvoiceNo	CustomerCode	CustomerName	InvoiceDescription	InvoiceValue	Currency	ExchangeRate	TaxRate	InvoiceDate	InvoiceStatus	SalesmanEmpNo	Sales
INV0000582	BIG0001	Big Bargains	SO004	893.55	ZAR	1.00	15.00	17/05/2022	N	KES001	Juland
INV0000583	BIG0001	Big Bargains	B6004	17,250.00	ZAR	1.00	15.00	18/05/2022	N	KES001	Juland

The status bar at the bottom indicates "User : JulandaK | 18/05/2022 | Version : 2.5.0.8 | Example Company v2.5.0.8".

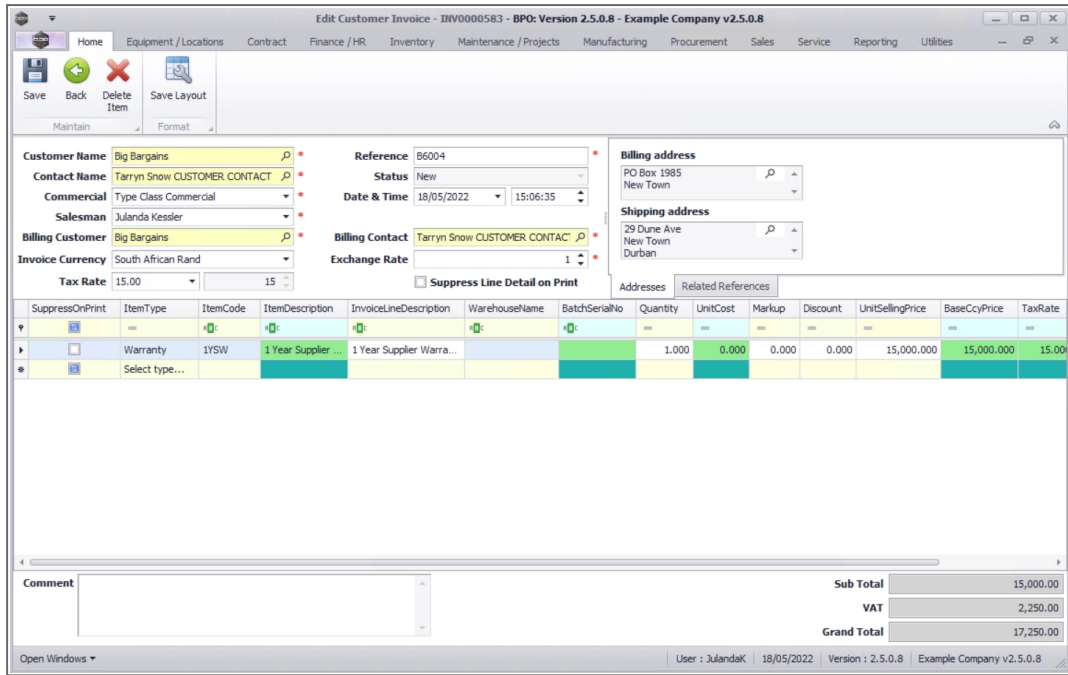
- The **Edit Customer Invoice - [invoice number]** screen will display
- Make the required changes to the **Heading Information**, **Addresses** or **Related References** tabs.
- Make the required changes to the Invoice Item frame.
  - To **Add** a new Invoice item, click on the **Select type** text 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.



- 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 Call* listing screen.

## COMMENT AND REFERENCE

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

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



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

## ADDITIONAL INVOICE ITEMS

### SAVE INVOICE

Edit Customer Invoice - INV000377 - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Print

Customer Name: Westwood Dynamic ρ • Reference: Additional Items for Service ρ • ReferenceType: Serial No  
 Contact Name: Jason March ρ • Status: New • ReferenceNo: 14-9652365  
 Commercial: Default ρ • Date & Time: 20 Dec 2017 12:26:05 • Call Reference: CH0000505  
 Salesman: Sarah Milder ρ • Billing Contact: Jason March ρ • Contract No: C00000011  
 Billing Customer: Westwood Dynamic ρ • Exchange Rate: 1 • Location:  
 Invoice Currency: South African Rand • Project Reference:  
 Tax Rate: 14 • Suppress Line Detail on Print:  • Quote Reference:

Item Type	Item Code	Item Description	Invoice Line Description	Warehouse Name	Batch Number	Quantity	Unit Cost	Markup	Discount	Unit Selling Price	Base Cost Price	Tax Rate	Department	Suppress On Print	Status
Parts	147-88...	K147 Black toner	K147 Black toner	Main Warehouse		1.00	310.29	0.00	0.00	360.00	360.00	14.00	Sales Dep...	<input type="checkbox"/>	A
Travel	50	Travel not exceed...	Travel not exceed...			1.00	0.00	0.00	0.00	175.00	175.00	14.00	Sales Dep...	<input type="checkbox"/>	A
Expenses	TOLL	Toll	Marianhill Toll Fee x 2			1.00	55.00	0.00	0.00	55.00	55.00	14.00	Sales Dep...	<input type="checkbox"/>	A

Comment:

Sub Total: 590.00  
 VAT: 82.60  
 Grand Total: 672.60

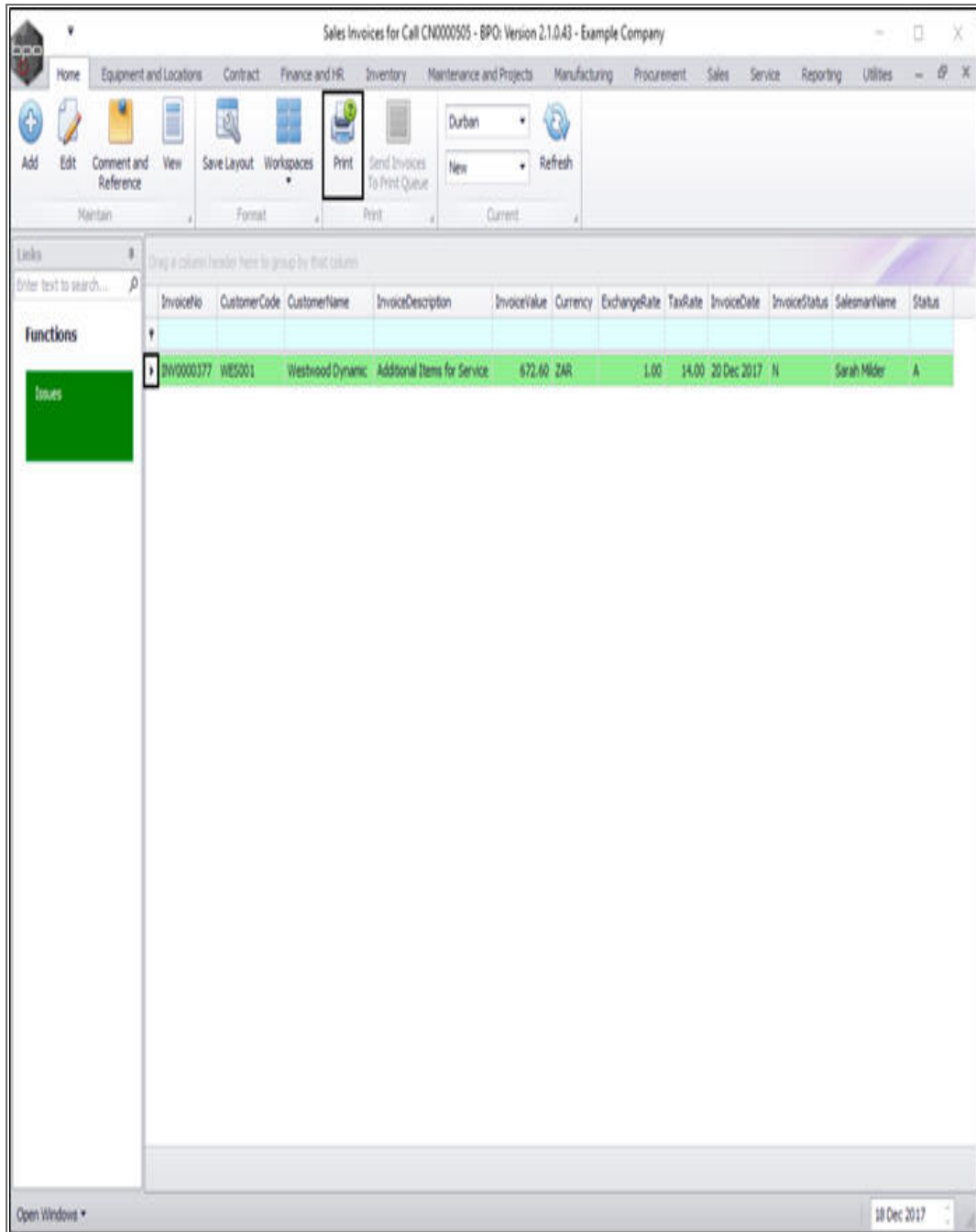
Open Windows \* 18 Dec 2017

You will return to the ***Sales Invoices for Call [invoice number]*** screen where you can view the newly raised ***invoice***.

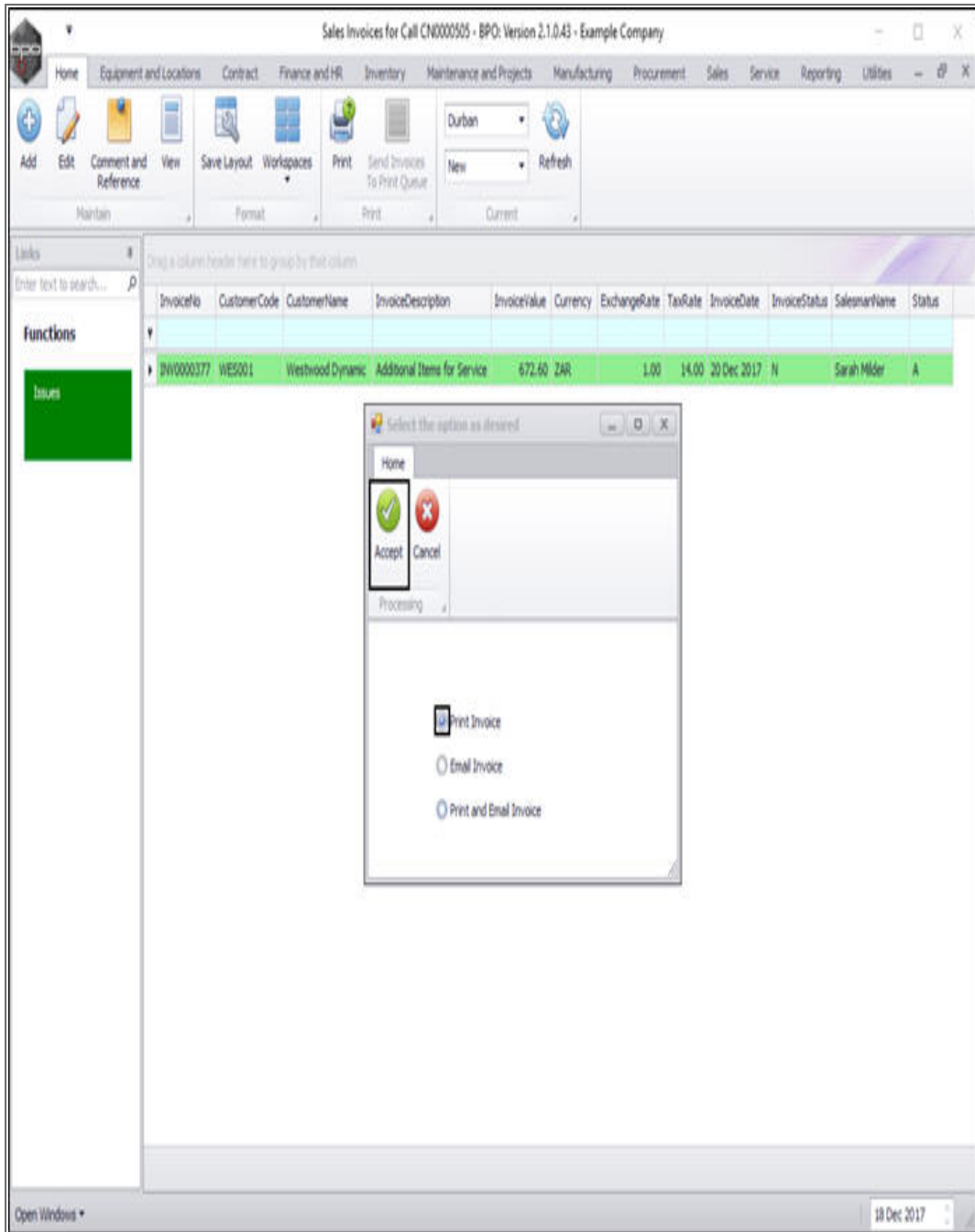
### **PRINT INVOICE**

---

- Click on the ***row selector*** in front of the ***new invoice*** that you wish to ***print***.
- Click on ***Print***.



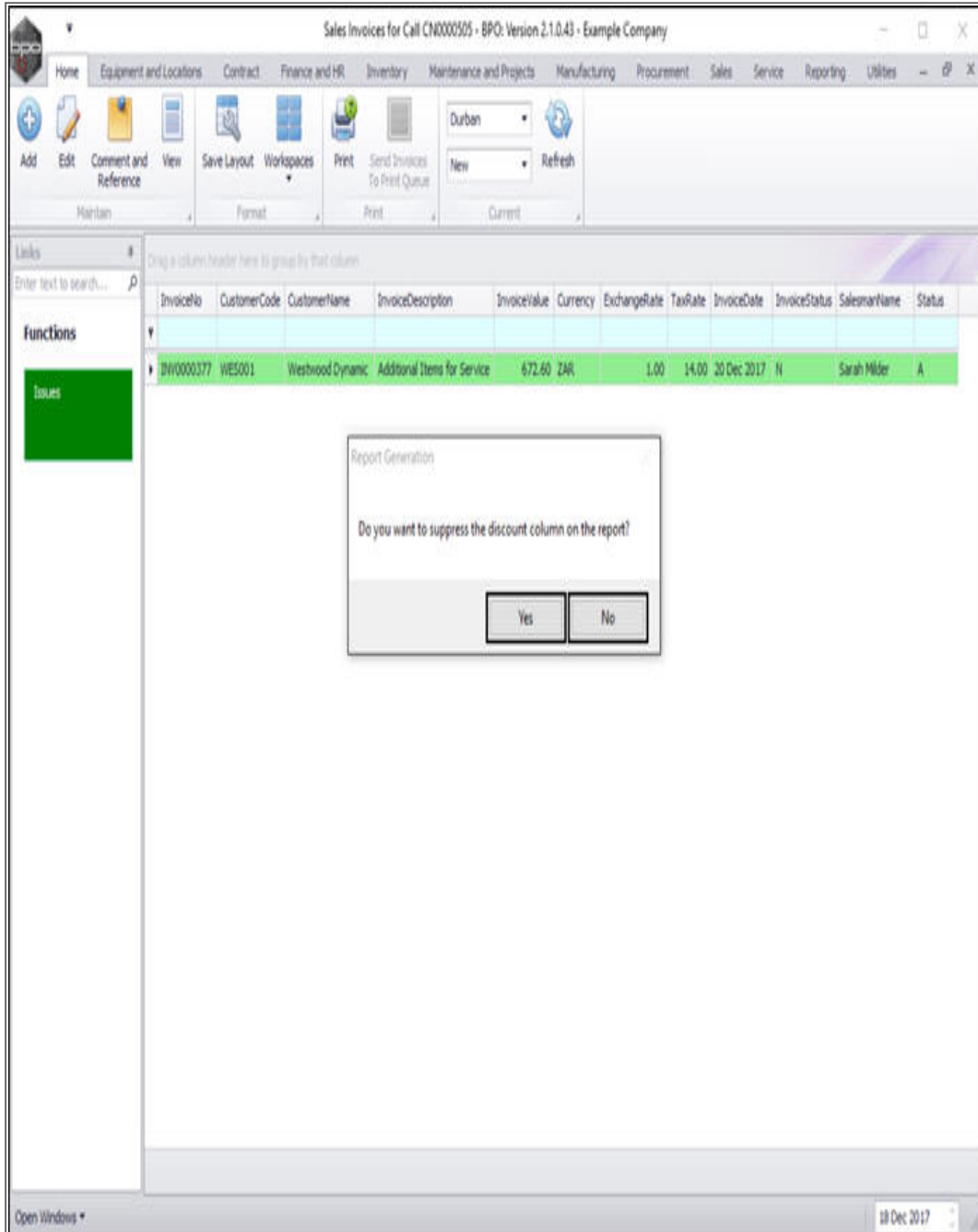
- A **Select the option as desired** screen will pop up.
- Click on **Print Invoice**.
- Click on **Accept**.



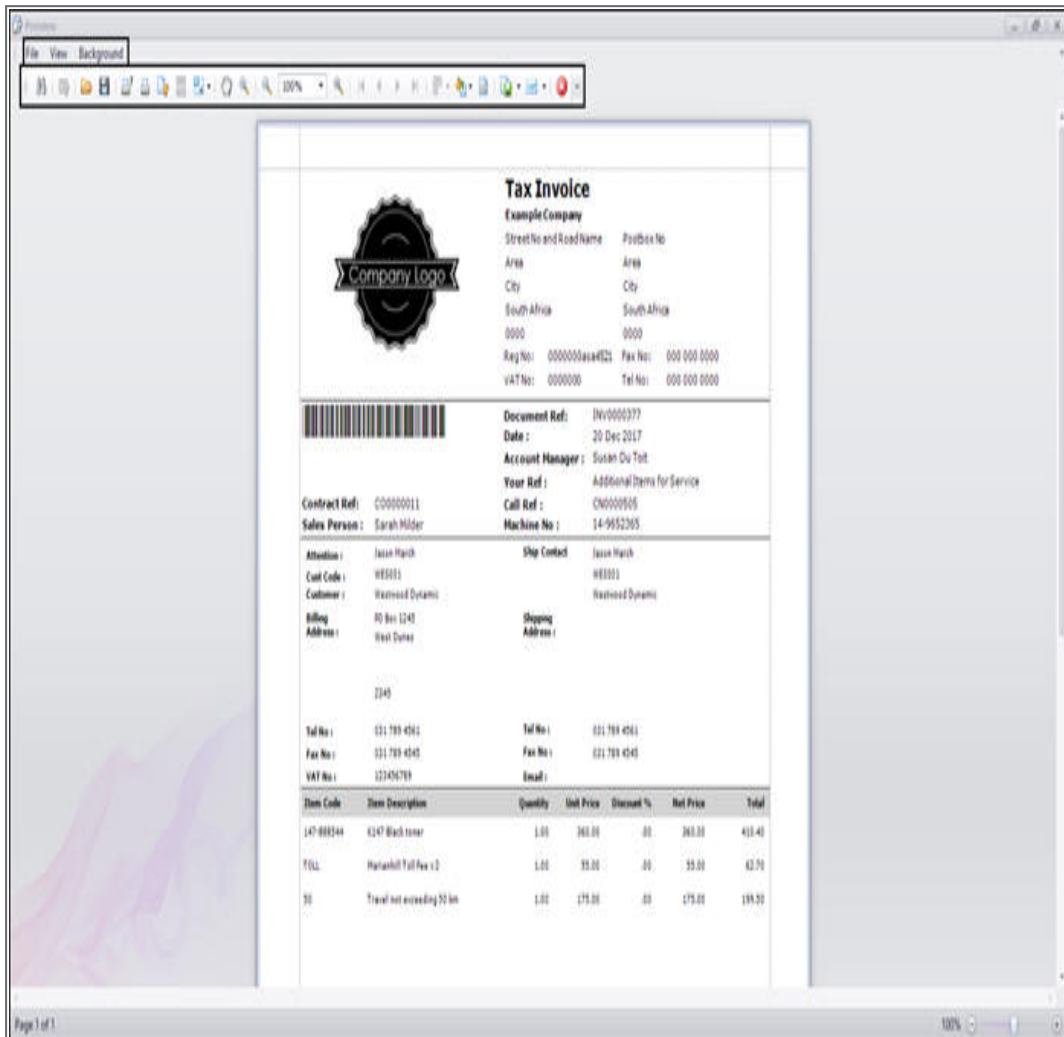
## SUPPRESS THE DISCOUNT COLUMN ON THE REPORT

- A **Report Generation** message box will pop up, asking;
  - **Do you want to suppress the discount column on the report?**

- Select **Yes** to **hide** the discount on the printed invoice.
- Select **No** to **show** the discount on the printed invoice.

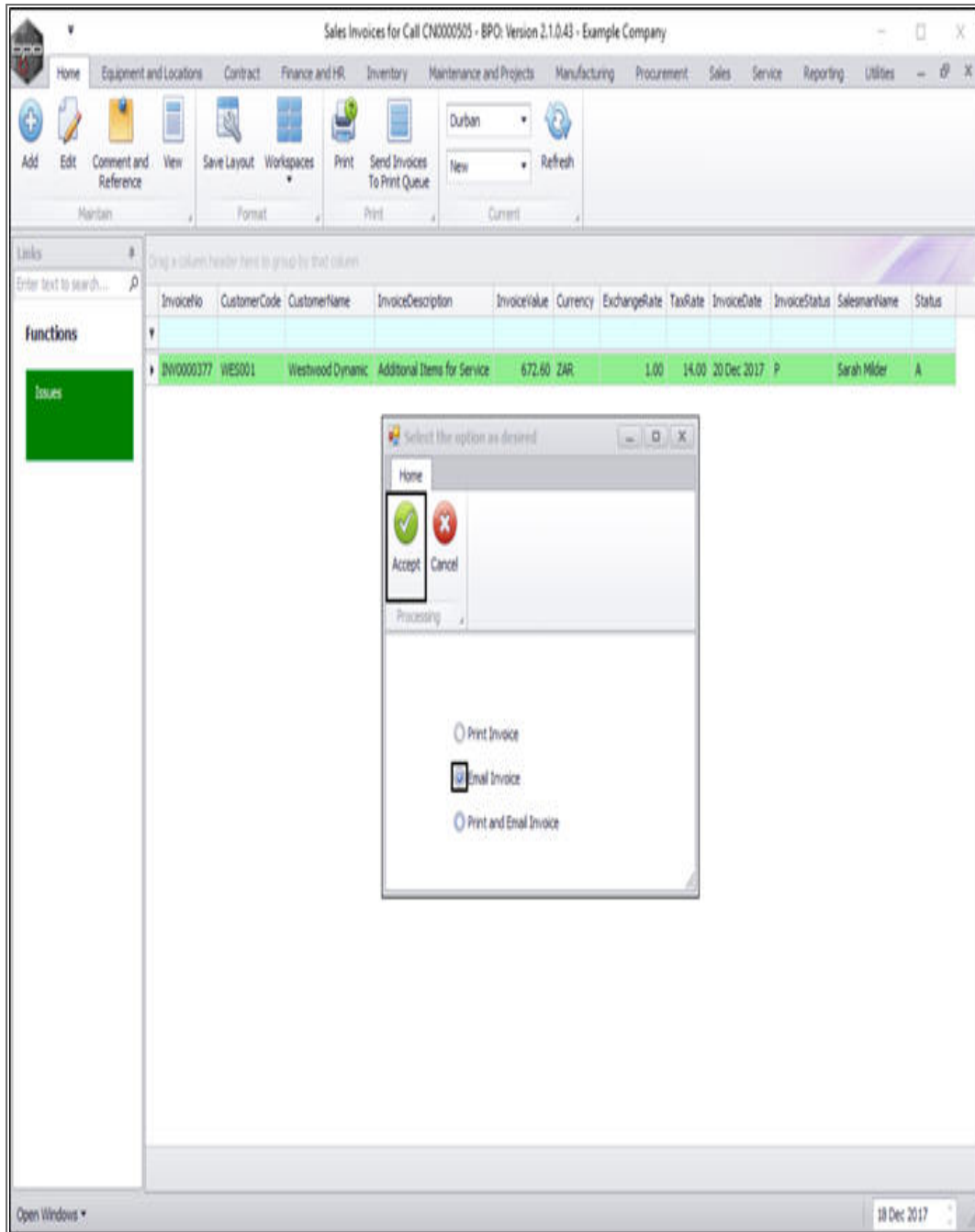


- The **Report Preview** screen will be displayed.
- From here you can **View, Print, Export** or **Email** the Invoice.
- **Close** the Report Preview screen when done.



## EMAIL INVOICE

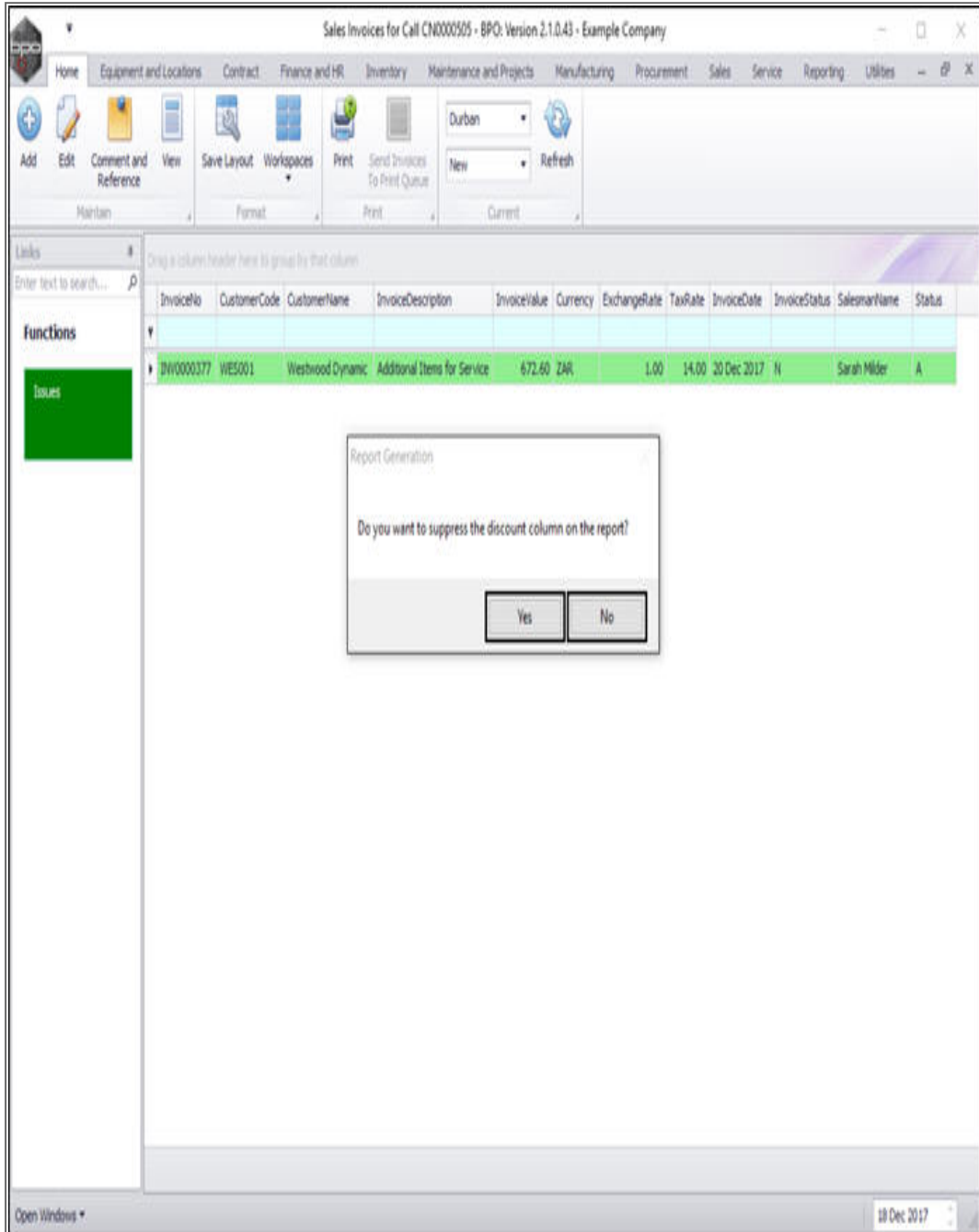
- In the **Select the option as desired** screen,
- Click on **Email Invoice**.
- Click on **Accept**.



## SUPPRESS THE DISCOUNT COLUMN ON THE REPORT

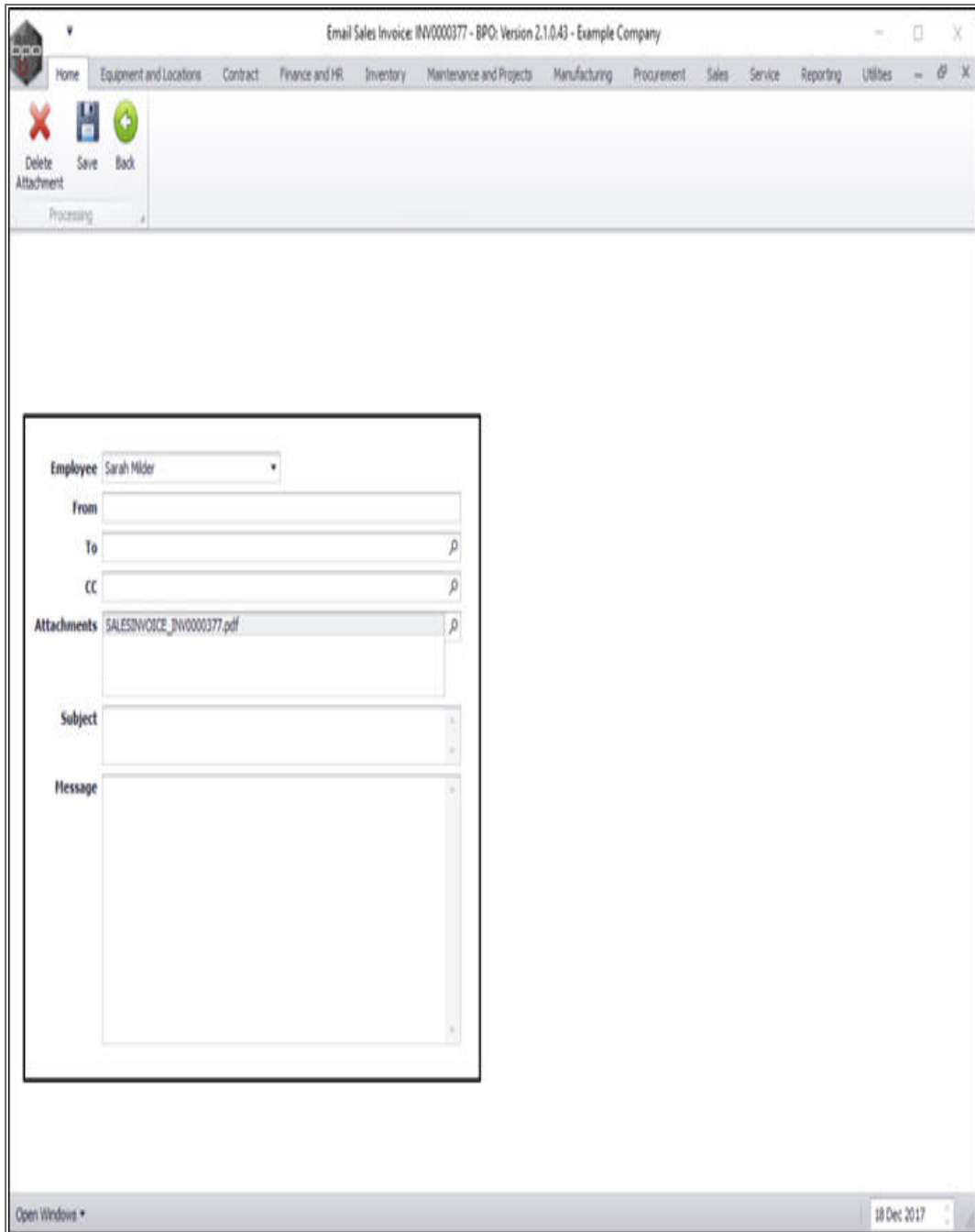
- A **Report Generation** message box will pop up, asking;
  - **Do you want to suppress the discount column on the report?**

- Select **Yes** to **hide** the discount on the printed invoice.
- Select **No** to **show** the discount on the printed invoice.

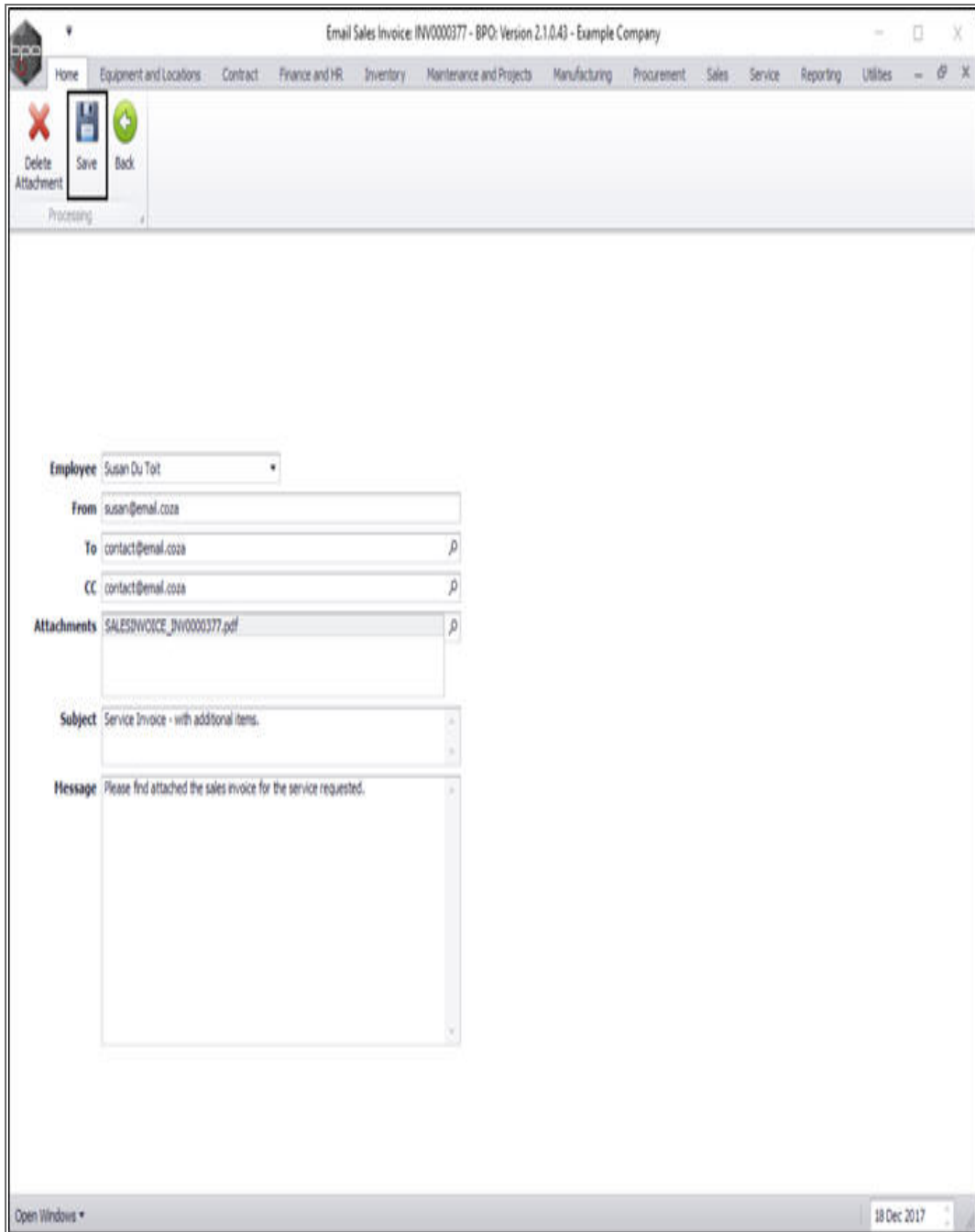


The **Email Sales Invoice [invoice number]** screen will be displayed.

- **Employee:** Will be populated by the employee linked to the associated login. Click on the drop-down arrow and select an alternative employee from the menu if required.
- **From:** The selected employee's email address will pull through here. If not populated, you can manually type in the email address.
- **To:** This will automatically populate with the sales invoice contact person's email address. Click on the search button to link more contacts from this customer. You also have the ability to manually type in an email address. This message will be sent from the server, so if you want to have email history for this, then add your email address here.
- **Attachments:** The sales invoice PDF will be attached to the email. If there are outstanding parts that have not been issued, a Back Order report will also be attached. You can link additional attachments by clicking on the search button and using the Select File screen to select a file to attach.
- **Subject:** Type in an email subject.
- **Message:** Type in an email message.



- When you have finished adding details to the Email Sales Invoice page, click on **Save**.



- Your email will be sent from the server and you will return to the **Call Listing** screen.

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