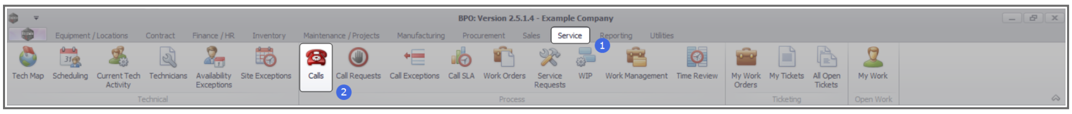
SERVICE

CALLS - SALES ORDER

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[1]. 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.

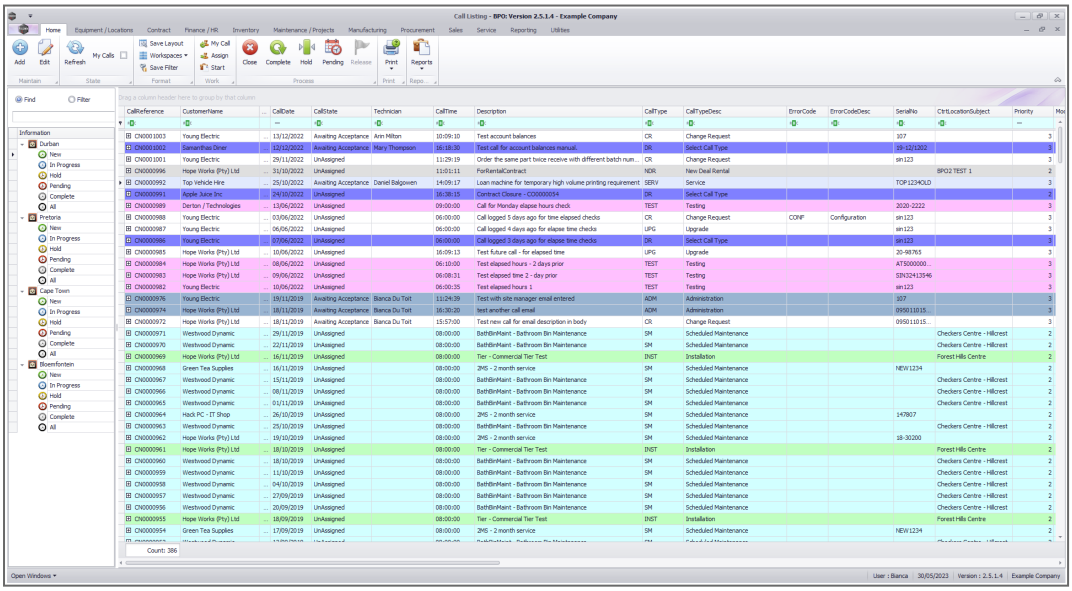
After a quote for additional work on a call has been **approved** by the client - this quote will need to be converted to a **Sales Order** to start the procurement process for the parts or services.

Ribbon Select ***Service > Calls***

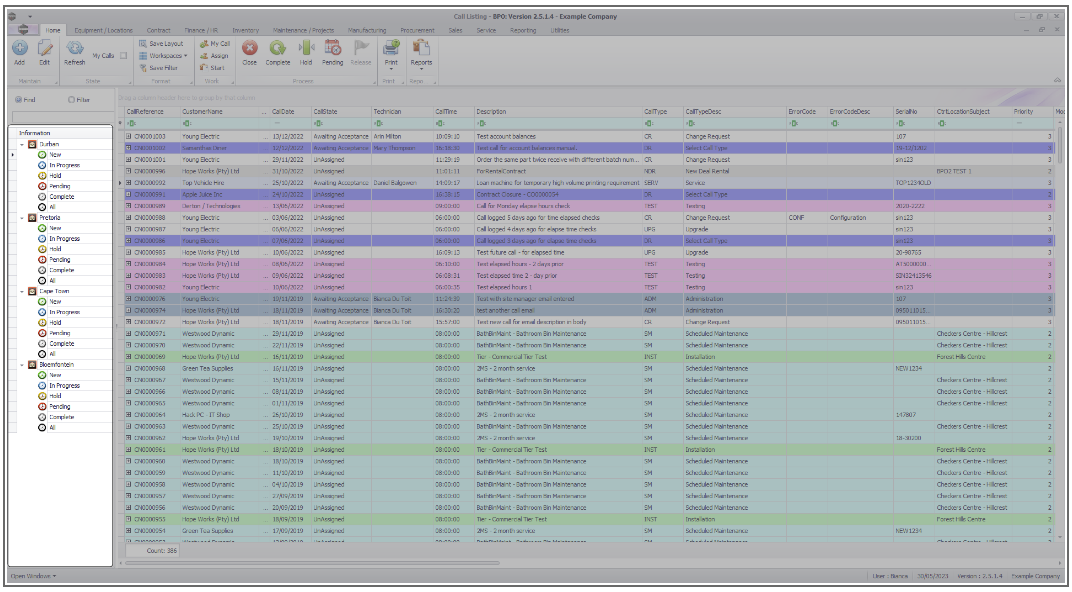


- The ***Call Listing*** screen will be displayed.

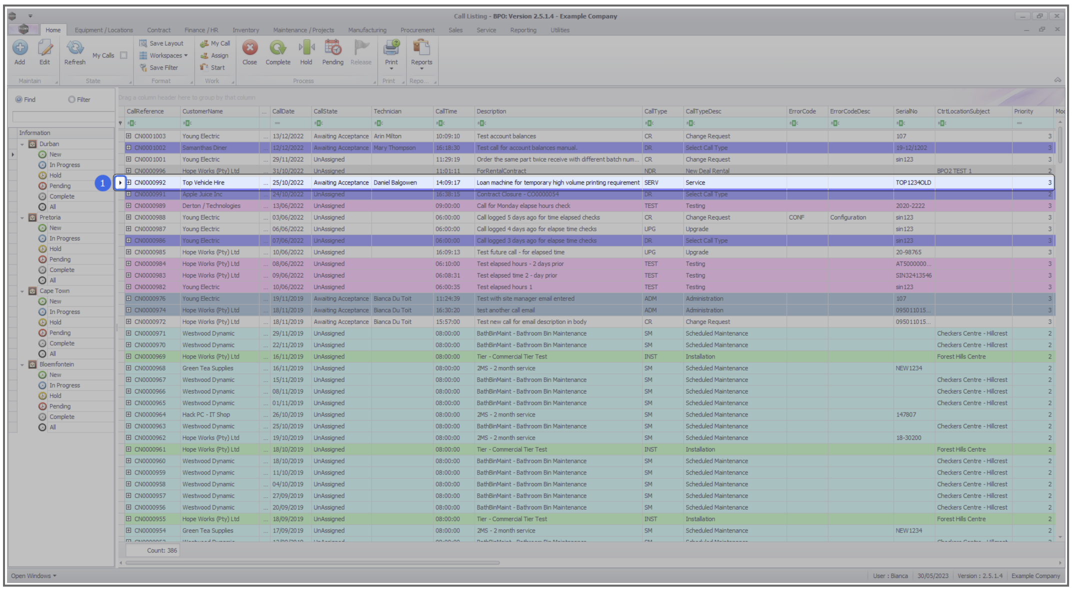
[1] BPO2 v2.5.1.3 or higher



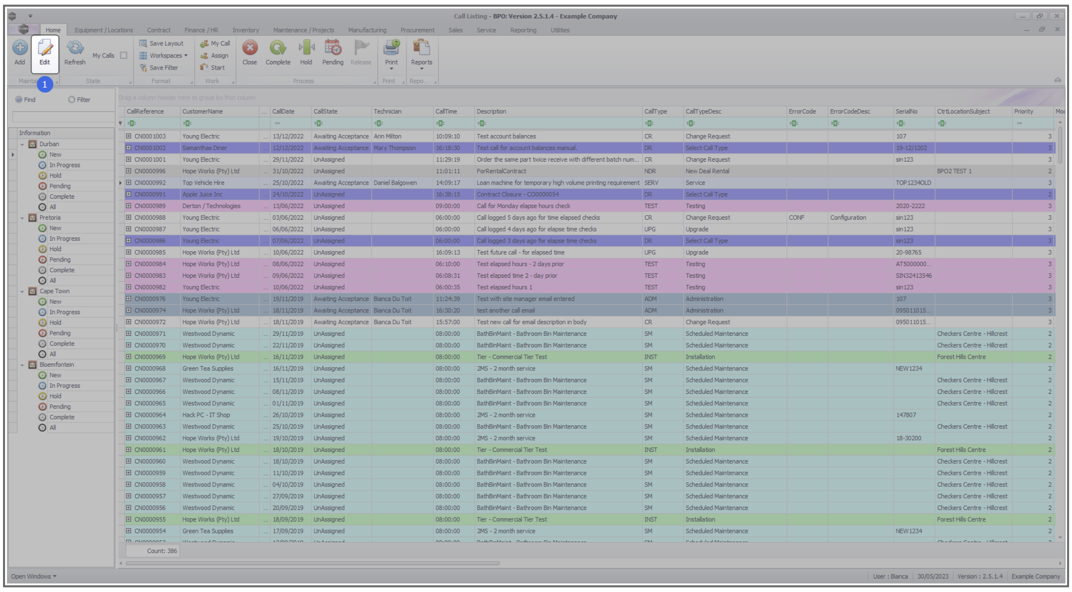
- The Calls are listed by ***Site*** and will display calls for the first Site listed.
- Click on the relevant ***Site*** for the calls you wish to view.



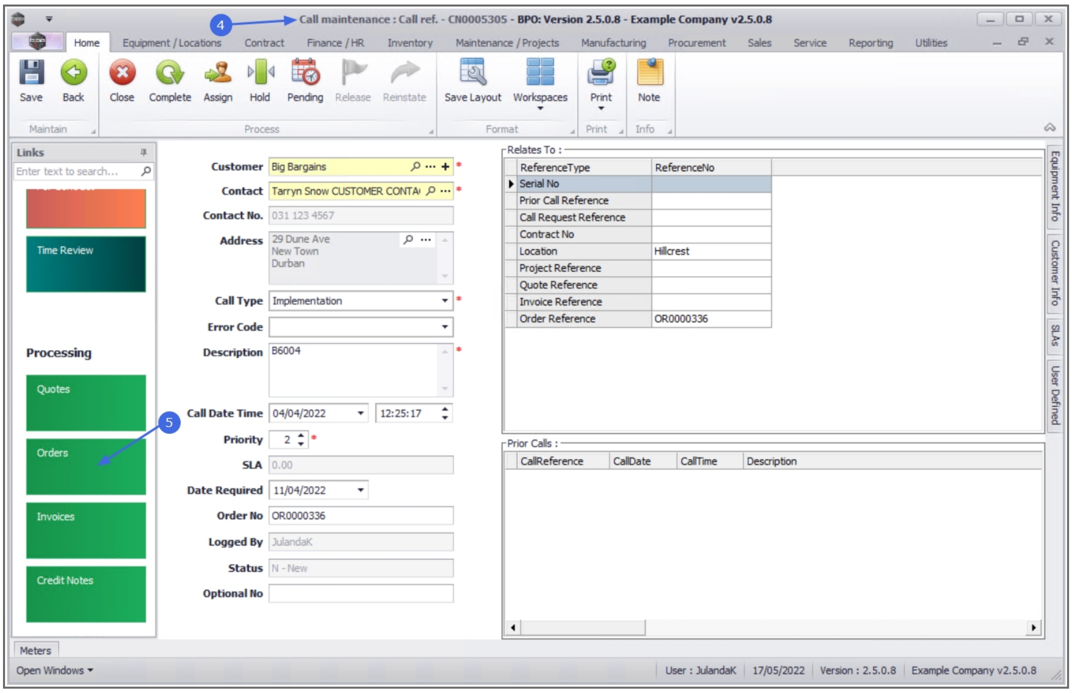
- Select the ***Call*** you wish to work with.



- Click on the ***Edit*** button.

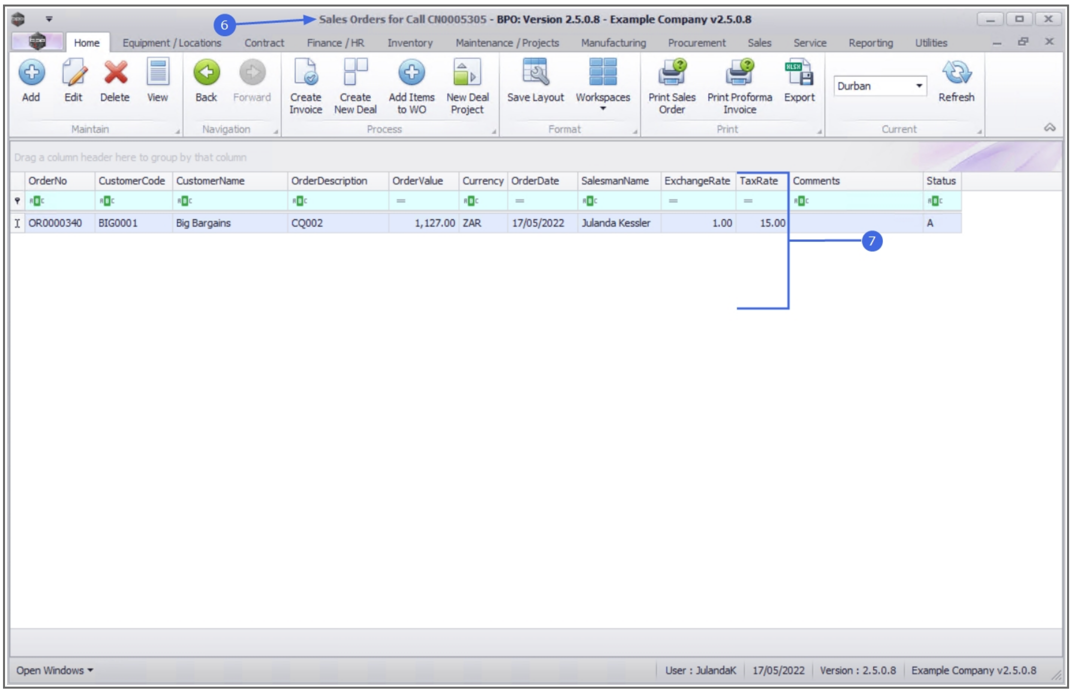


- The ***Call maintenance : Call ref. - [****call ref number****]*** screen will be displayed.
- Click on the ***Orders*** tile.



SALES ORDER LISTING

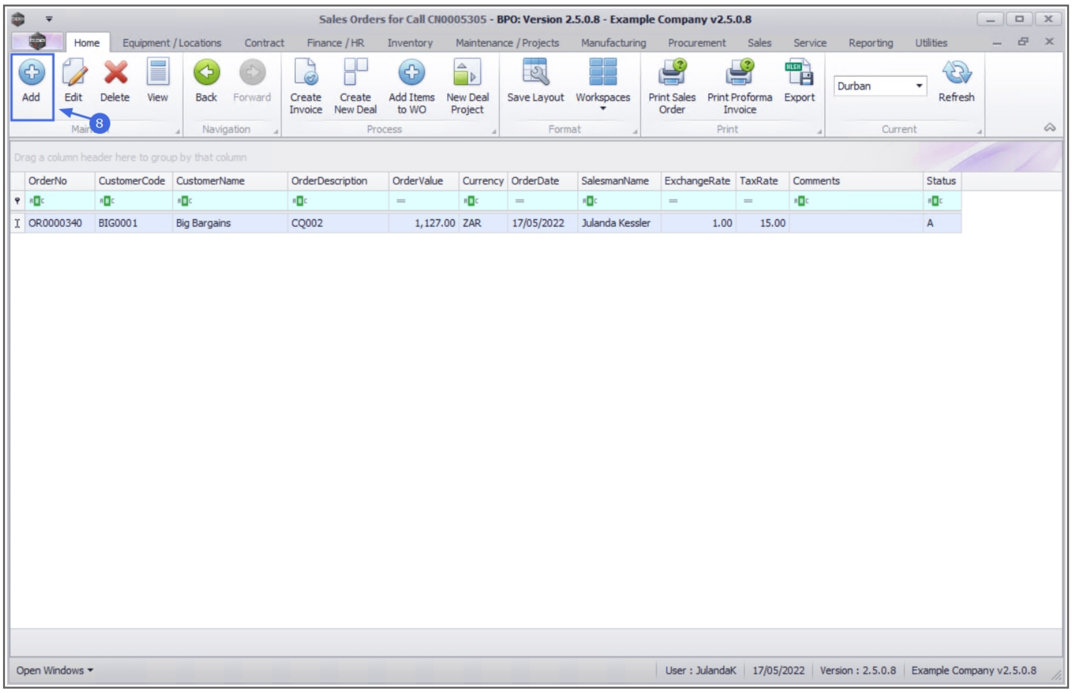
- The ***Sales Quotes for Call [****call ref number****]*** screen will be displayed.
- Any orders that have already been added for the call, will be listed on this screen.



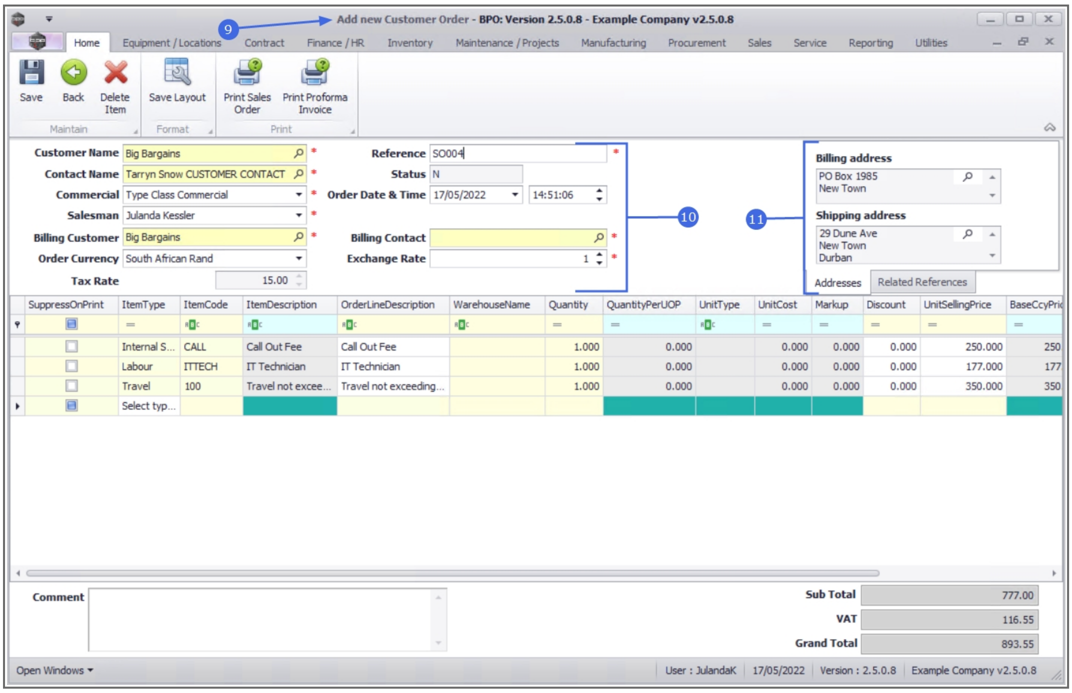
ADD SALES ORDER

- Click on ***Add***.

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



- "The Add new Customer Order screen will be displayed. " on page 2
- Complete the ***Sales Order Header*** and the ***Financial Header*** Information.
- Confirm the ***Billing and Shipping Addresses*** for the customer, if these fields were not auto populated when you entered the order header information.

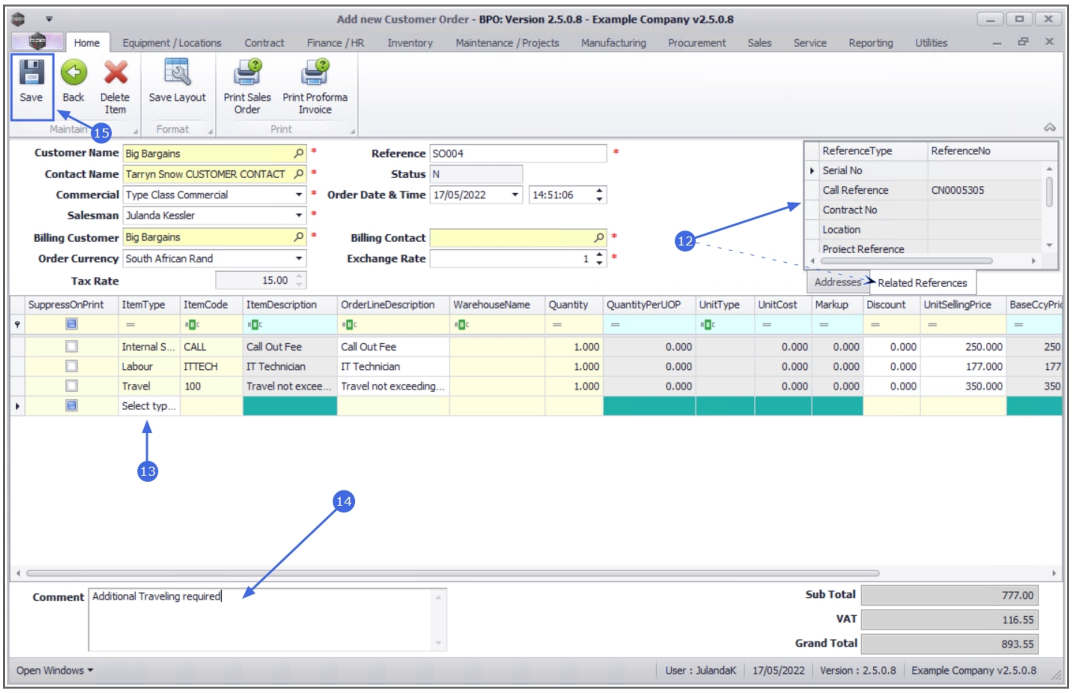


RELATED REFERENCES

- Click on the ***Related References*** tab to link the reference information for the customer Order.

LINE ITEMS AND COMMENTS

- " Add Sales Order Items" on page 11 as required.
- Click in the ***Comments text box*** to type a comment related to the Order.
- Click on ***Save***to save the customer Order.



- The ***Sales Orders for Customer*** listing screen will be updated with the new Order that you have created.

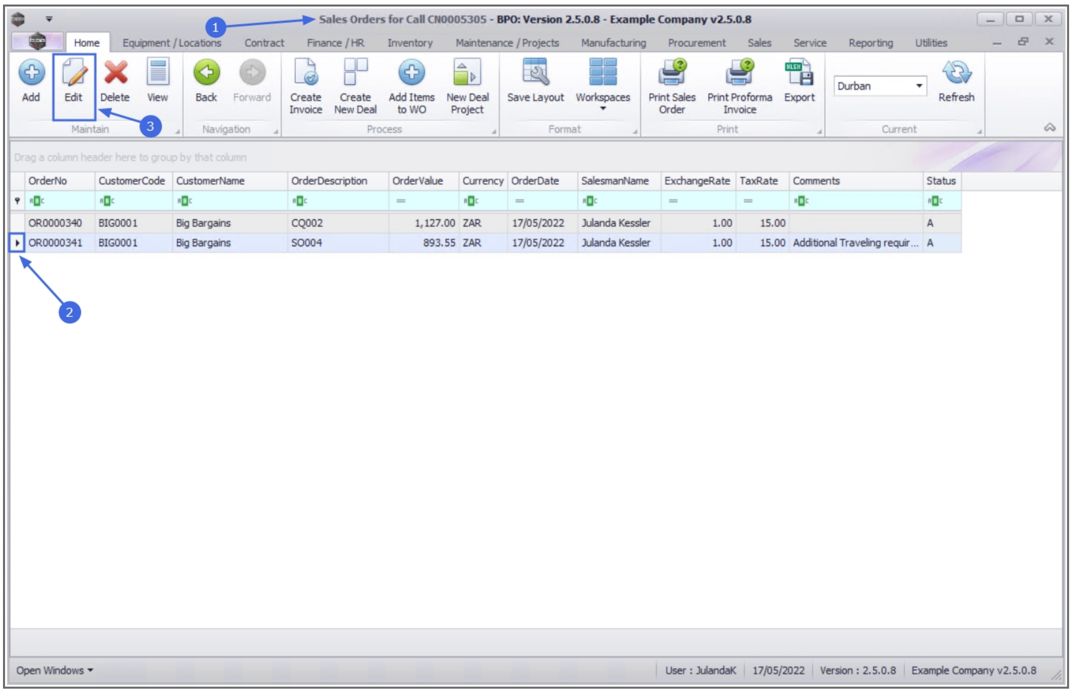
For a detailed handling of this topic refer to Orders - Add Sales Order

EDIT SALES ORDER

Sales Orders that have already been invoiced will **not** be available for editing.

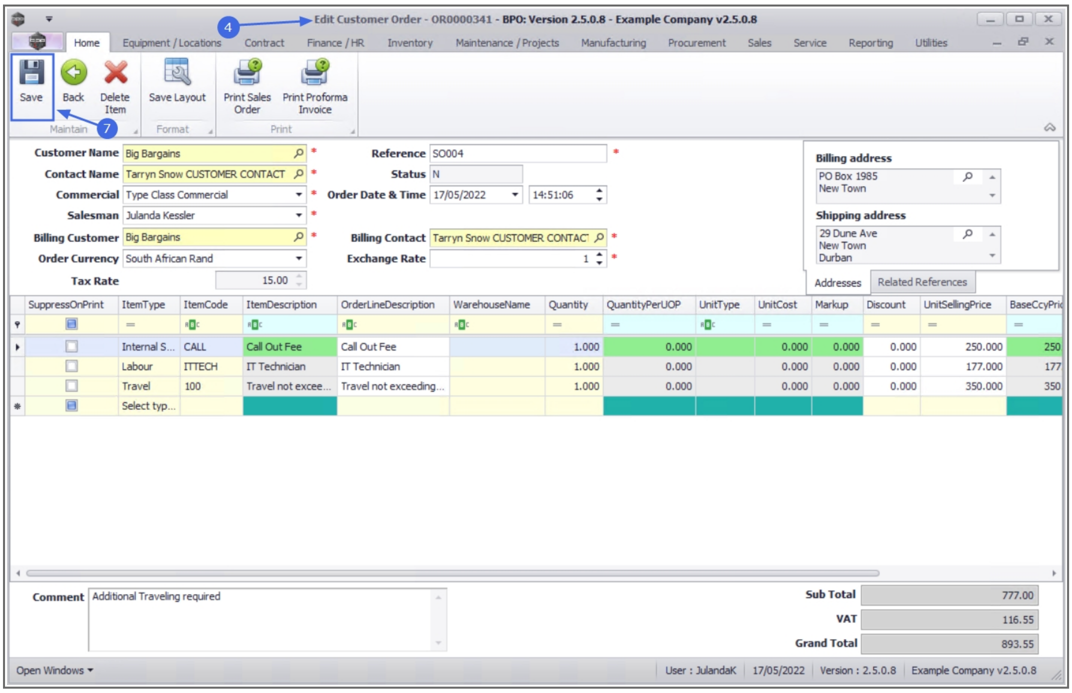
- From the ***Sales Orders for Call [****call ref number****]*** screen,
- Click in the ***row*** of the Sales Order you wish to edit.
- Click on ***Edit***.

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



- The ***Edit Customer Order - [****Order Number****]*** listing screen will display.
- Make the required changes to the ***Heading Information***, ***Addresses*** or ***Related References tabs***.
- Make the necessary changes to the Order Item frame:
  - To " Add Sales Order Items" on page 11, click in the Item Type column of the next available row.
  - To "Delete Item line entry" on page 8, click on the ***row*** of the item you wish to remove, then click on ***Delete Item***.
- Click on ***Save*** to save the changes to the Customer Order and return to the ***Sales Orders for Customer*** screen.

For a detailed handling of this topic refer to Orders - Edit Sales Order



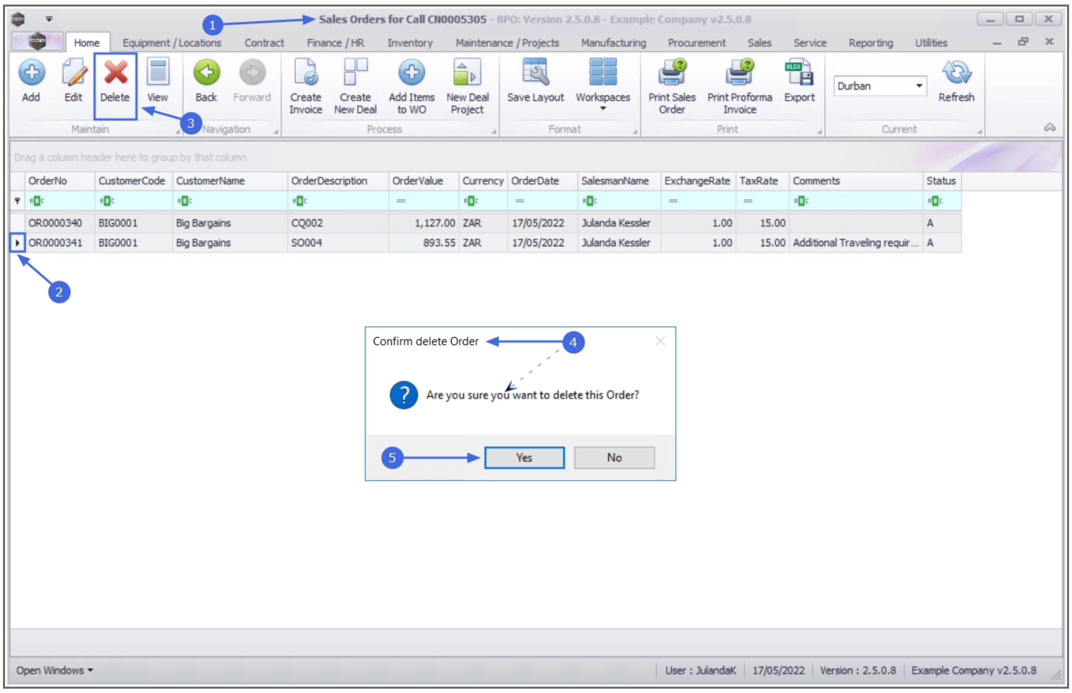
DELETE SALES ORDER

Orders that have already been invoiced will **not** be available for deletion.

- From the ***Sales Orders for Call*** *[call ref number]* screen,
- Click on to the***row***of the Sales Order you wish to ***remove***.
- Click on ***Delete***.

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

- The ***Confirm delete Order*** message will display;
  - ***Are you sure you want to delete this Order?***
- Click on ***Yes***.



The Sales Order will be ***removed*** from the ***Sales Orders for Customer*** listing screen.

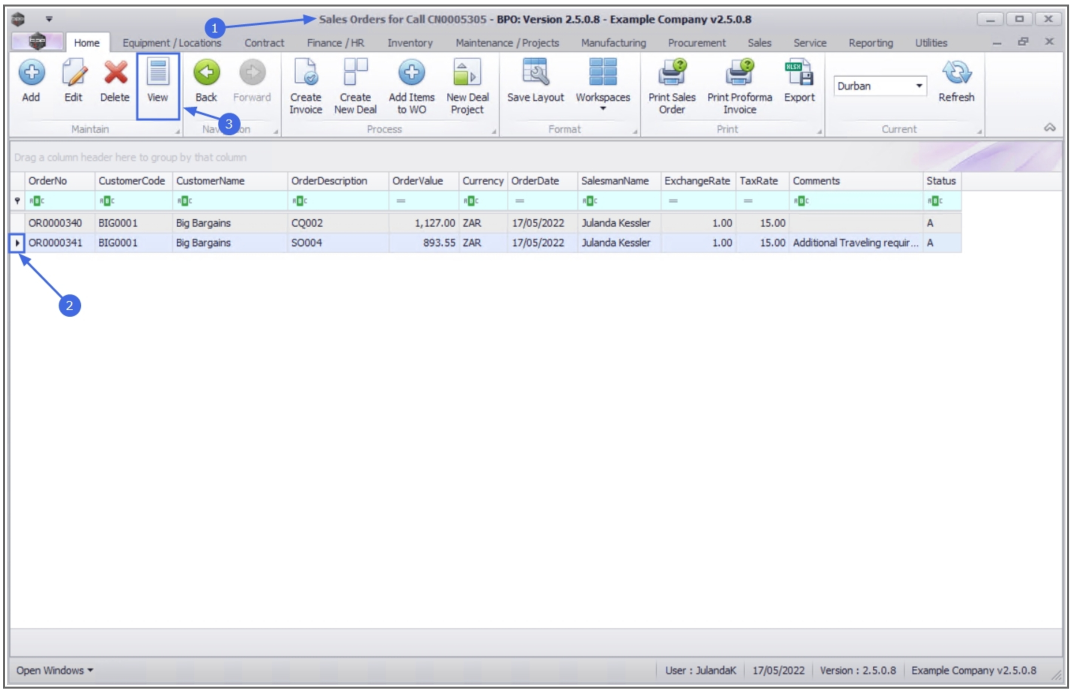
For a detailed handling of this topic refer to Orders - Delete Sales Order

VIEW SALES ORDER

An Order can be *viewed* in **any** status.

- From the ***Sales Orders for Call*** *[call ref number]* screen,
- Click on the***row*** of the Sales Order that you wish to ***view***.
- Click on ***View***.

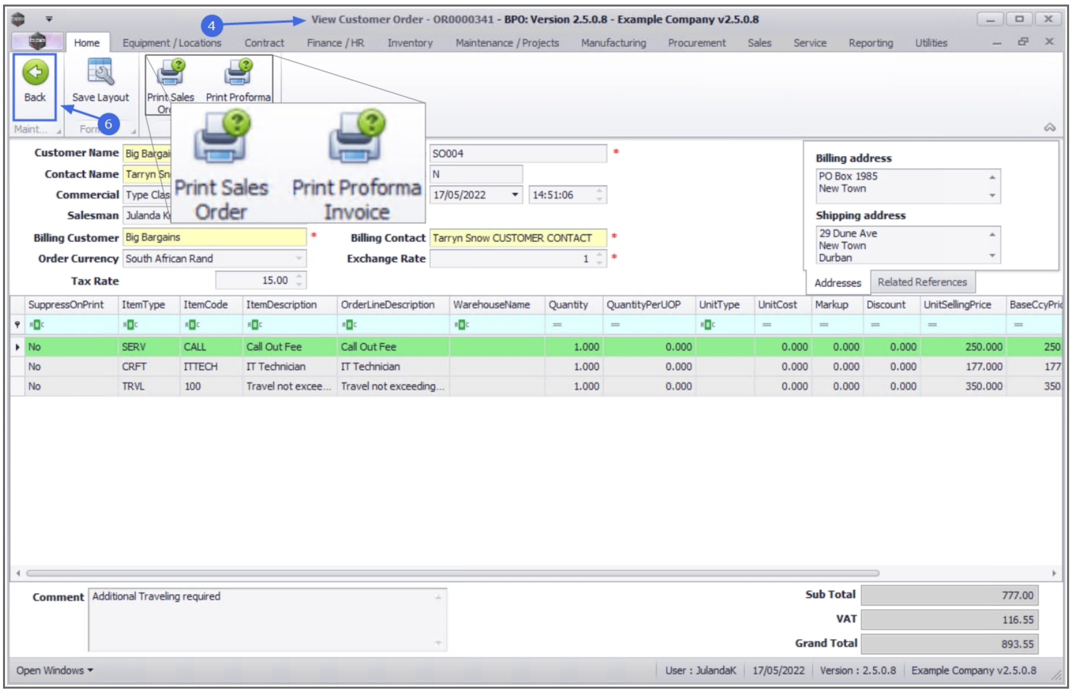
Short cut key: *Right click* to display the *All groups* menu list. Click on *View*.



- The ***View Customer Order - [****Order Number****]*** screen will display.

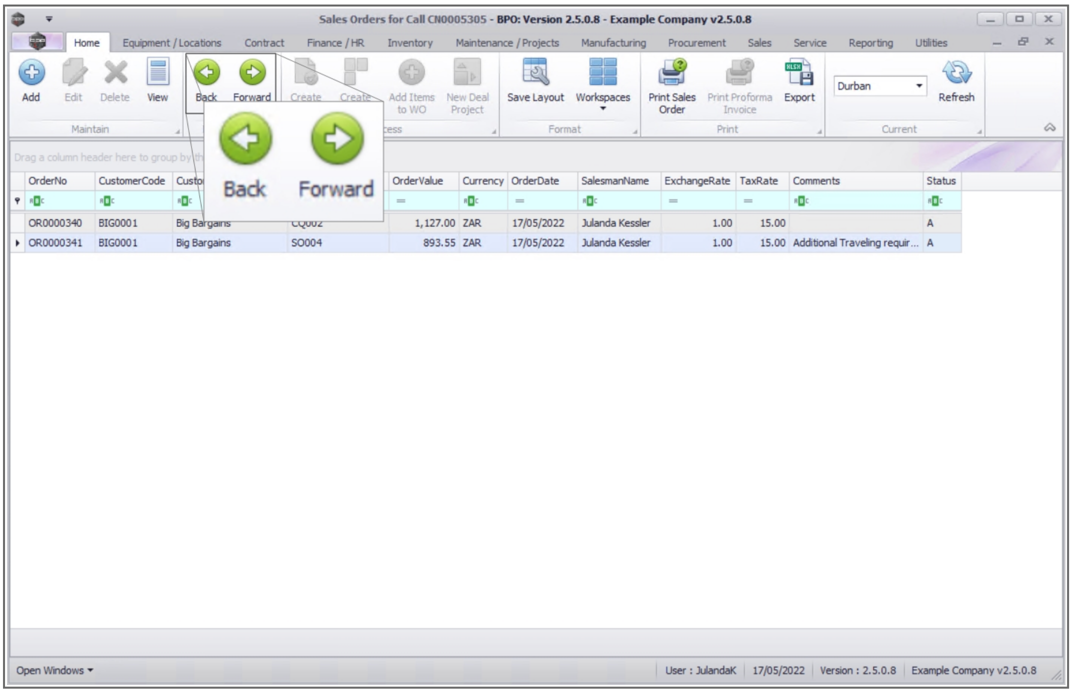
> No changes can be made to the information on the Order as this is a **view only** screen.

- You can "Print Sales Order / Print Proforma Invoice" on page 24 from this screen.
- Click ***Back***to return to the ***Sales Orders for Work Order*** screen.



NAVIGATION BUTTONS

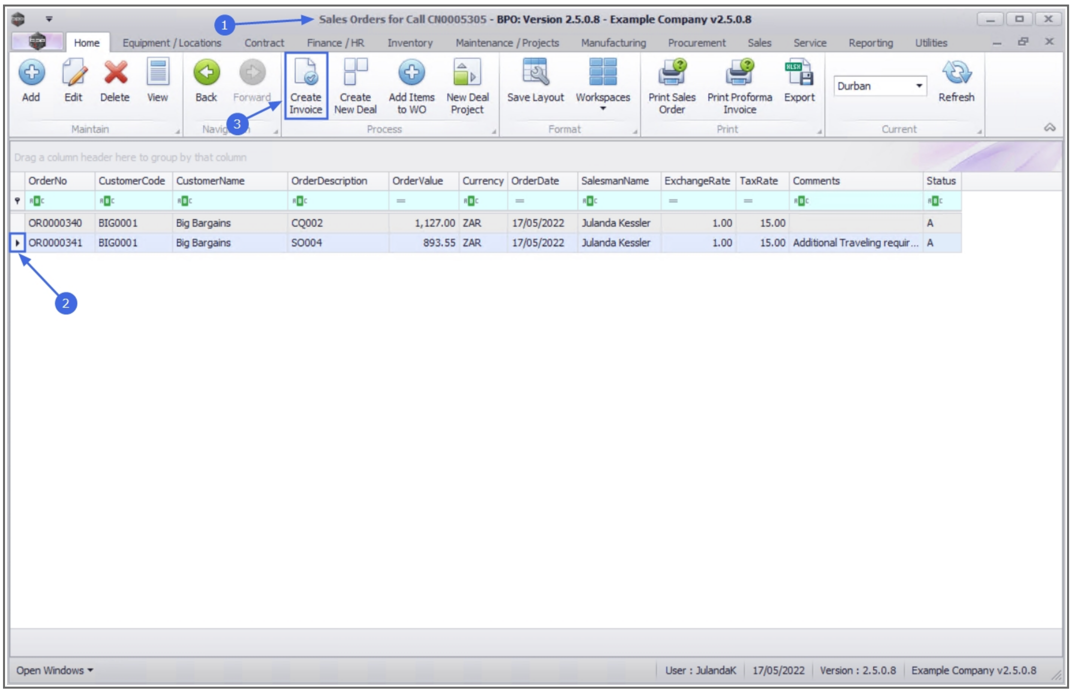
- The ***Forward*** navigation button allows for quick navigation to related documentation, by navigating to view the Sales Customer Invoice that has been created from the selected Sales Order.
- The ***Back*** navigation button will transport you back to the ***Work Order Listing*** screen.



CREATE INVOICE

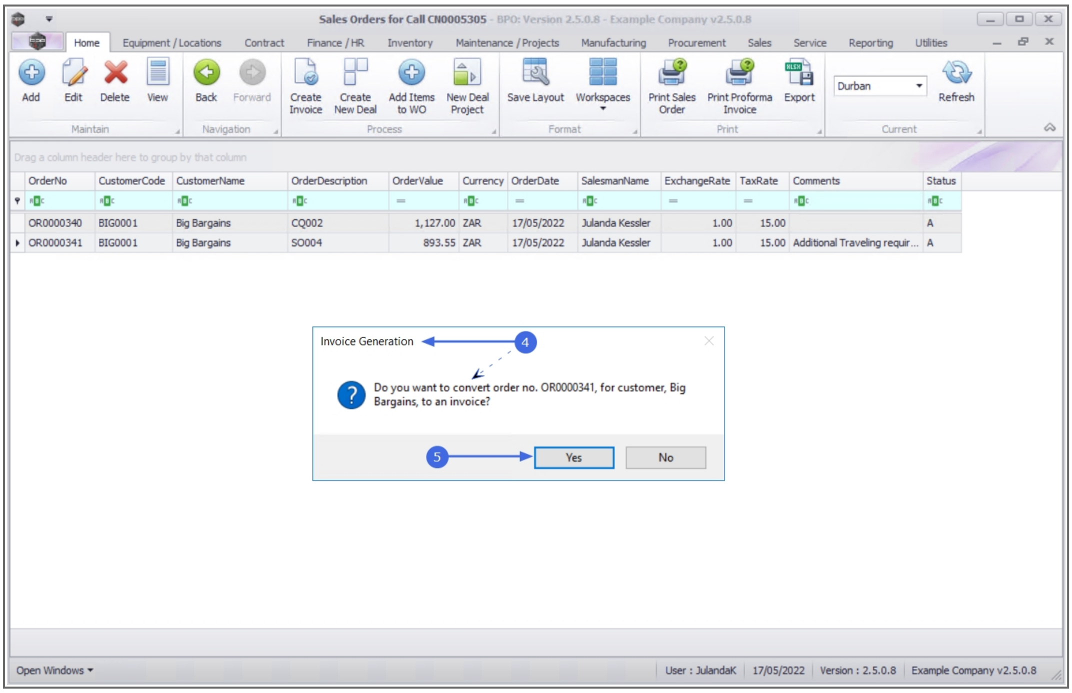
- From the ***Sales Orders for Call [****call ref number****]*** screen,
- Select the ***row*** of the Sales Order you wish to ***create an invoice*** for.
- Click on ***Create Invoice***.

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

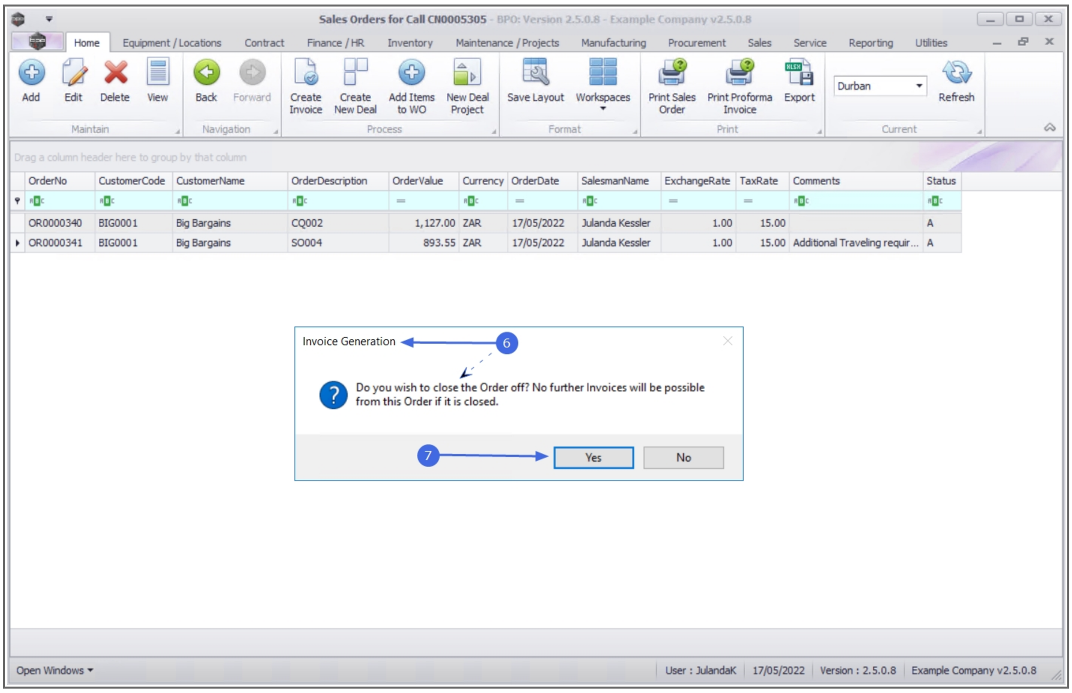


You will receive three (**3**) ***Invoice Generation*** messages:

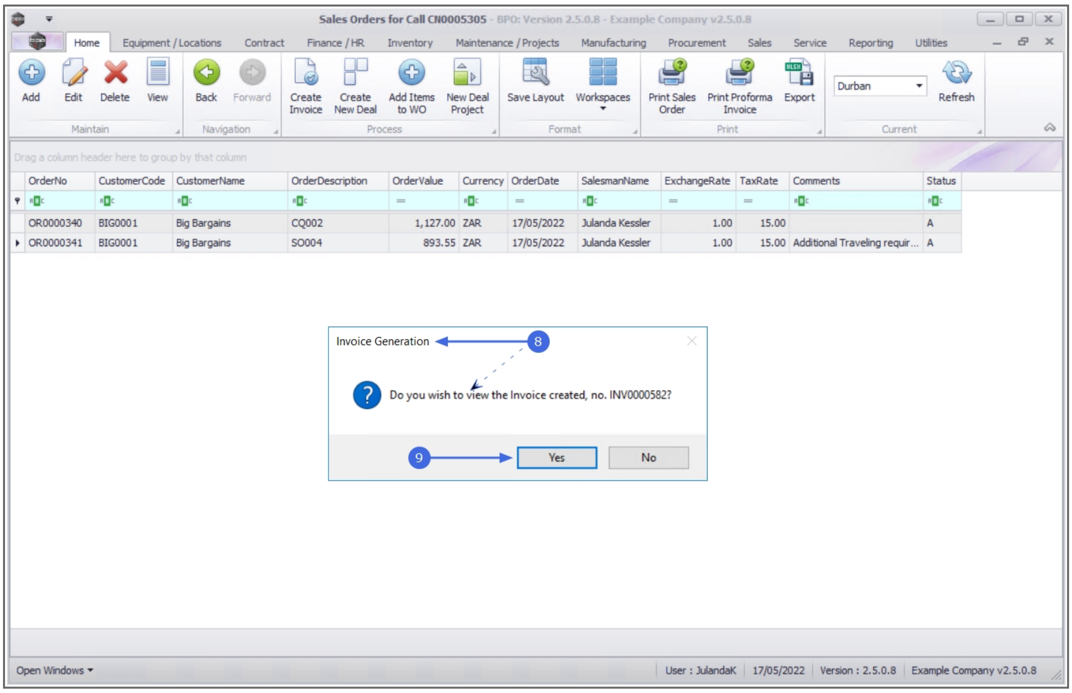
- The first ***Invoice Generation*** message will confirm;
  - ***Do you want to convert order no. [**order number**], for customer, [**customer code**], to an invoice?***
- Click on ***Yes***.



- The second ***Invoice Generation*** message will confirm;
    - ***Do you wish to close the Order off? No further Invoices will be possible from this Order if it is closed.***
- Click on ***Yes***.

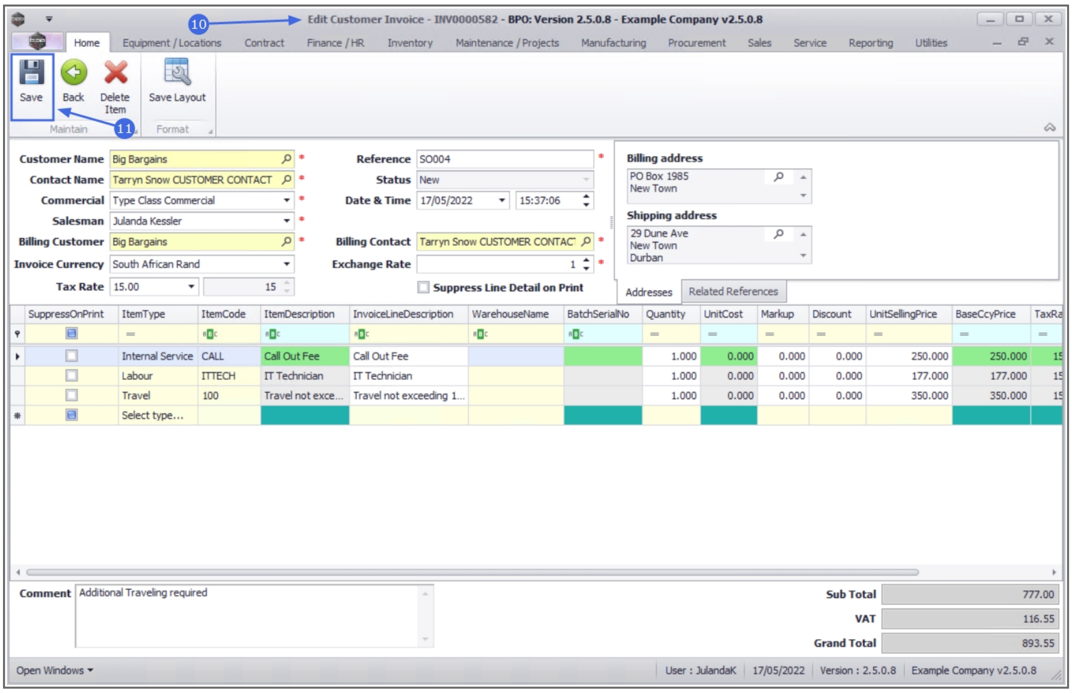


- When you receive the third ***Invoice Generation*** message to confirm;
    - ***Do you wish to view the Invoice created, no [****invoice number****]?***
- Click on ***Yes*** to view the Invoice.
    - Click on ***No*** to return to the ***Sales Orders for Customer*** screen.



- The ***Edit Customer Invoice*** screen will display where you can view or make changes to the Invoice, if required.
- After making the necessary changes, click on ***Save***.

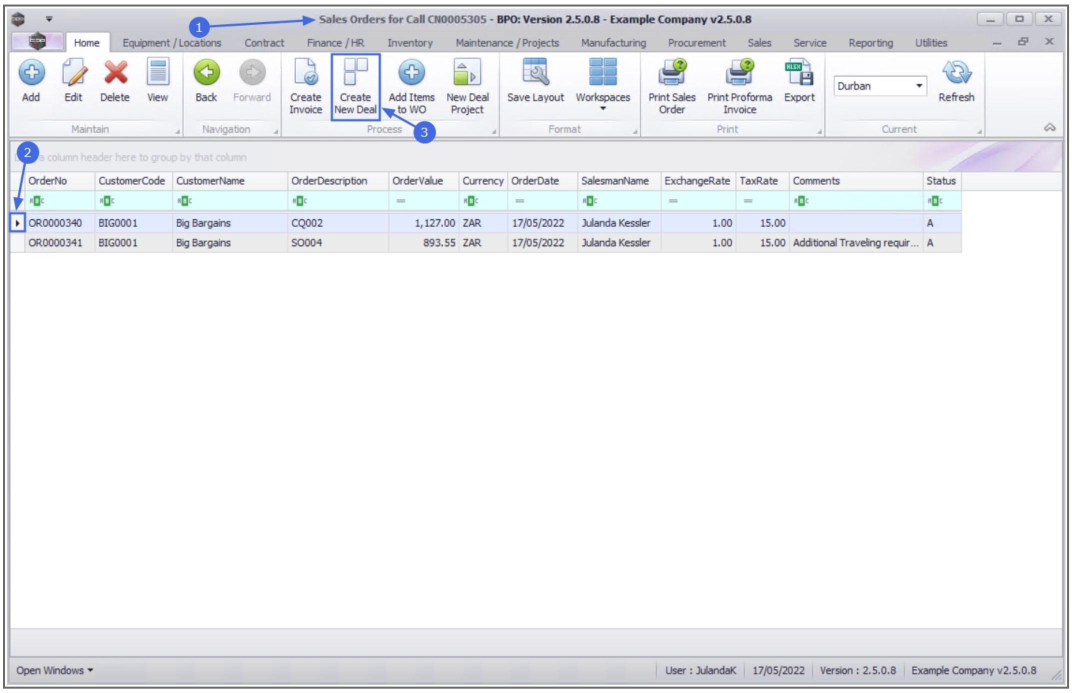
For a detailed handling of this topic refer to Orders - Convert to Sales Invoice



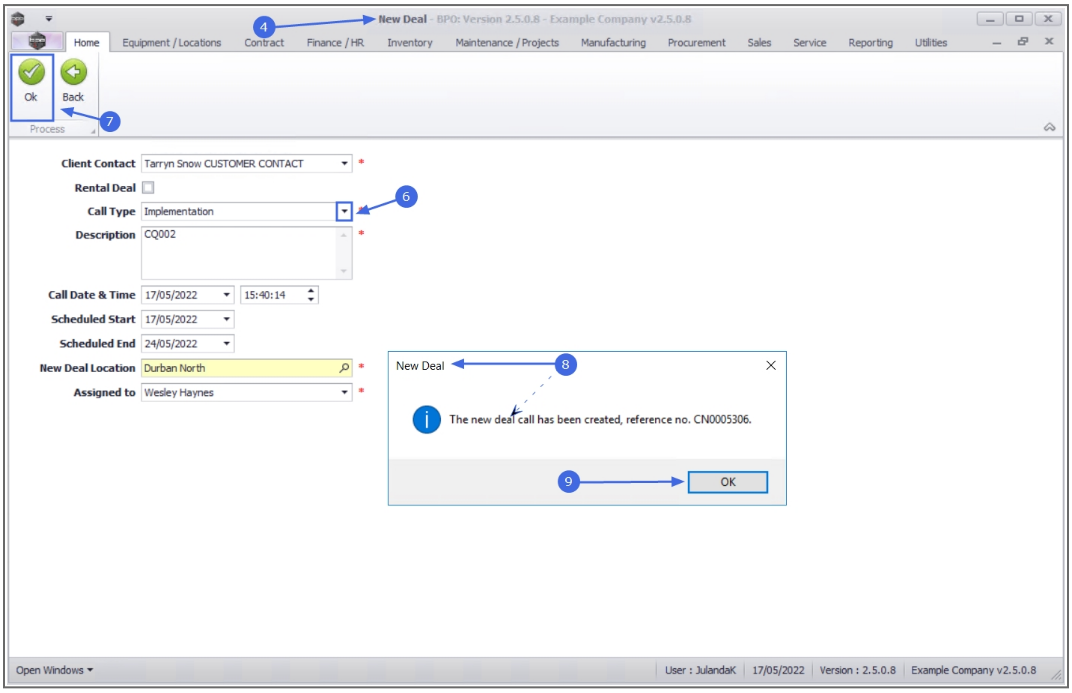
CREATE NEW DEAL

- From the ***Sales Orders for Call [****call ref number****]*** screen,
- Select the ***row*** of the Sales Order you wish to create a New Deal for.
- Click on ***Create New Deal***.

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



- "The New Deal screen will be displayed." on page 3
- Complete the New Deal information as required.
- The ***Call Type*** field enables you to distinguish if this order is a New Deal Sale or New Deal Rental.
- When you have completed the new deal information, click on ***OK***.
- When you receive the ***New Deal*** message to confirm that;
  - ***The new deal call has been created, reference no.*** *[reference number]*
- Click on ***OK***.



- You will return to the ***Sales Orders*** screen.

For a detailed handling of this topic refer to Orders - Convert to New Deal Sale / Rental

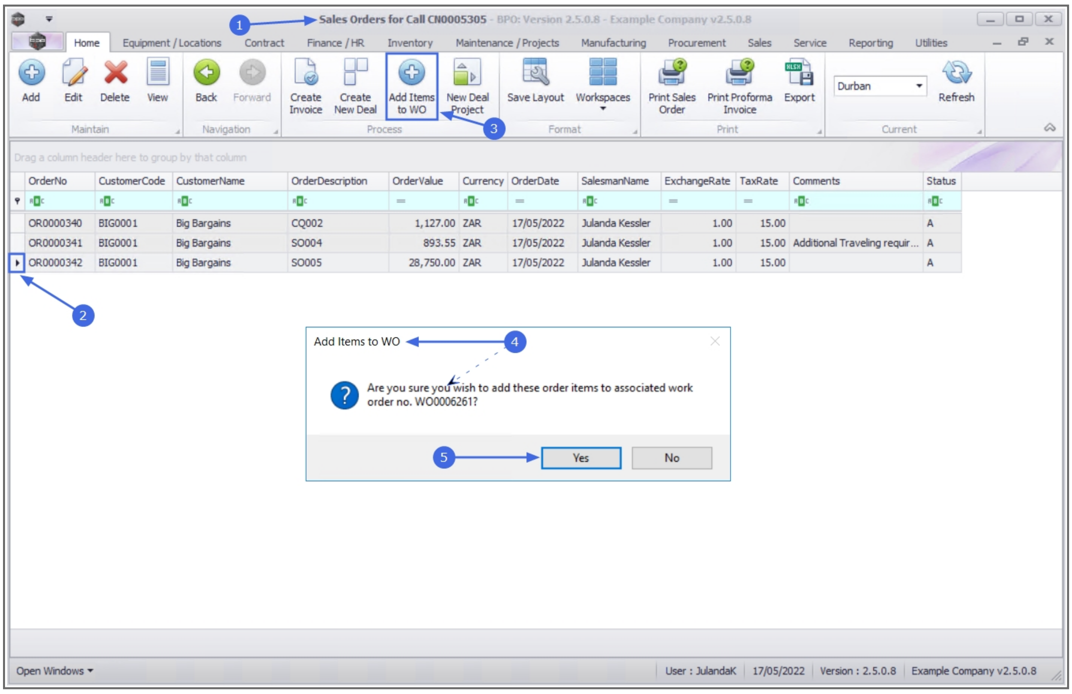
ADD ITEMS TO WORK ORDER

The *Add Items to WO* function is only valid where the Customer Order has been linked to an existing Work Order.

- From the ***Sales Orders for Call [****call ref number****]*** screen,
- Select the ***row*** of the Sales Order you wish to add items to.
- Click on ***Add Items to WO***.

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

- When you receive the ***Add Items to WO*** message to confirm;
    - ***Are you sure you wish to add these order items to associated work order no [****work order number****]?***
- Click on ***Yes***.



- You will return to the ***Sales Orders for Work Order*** screen.
- The Work Order items will have been added to the Sales Order.

For a detailed handling of this topic refer to Orders - Add Items to Work Order

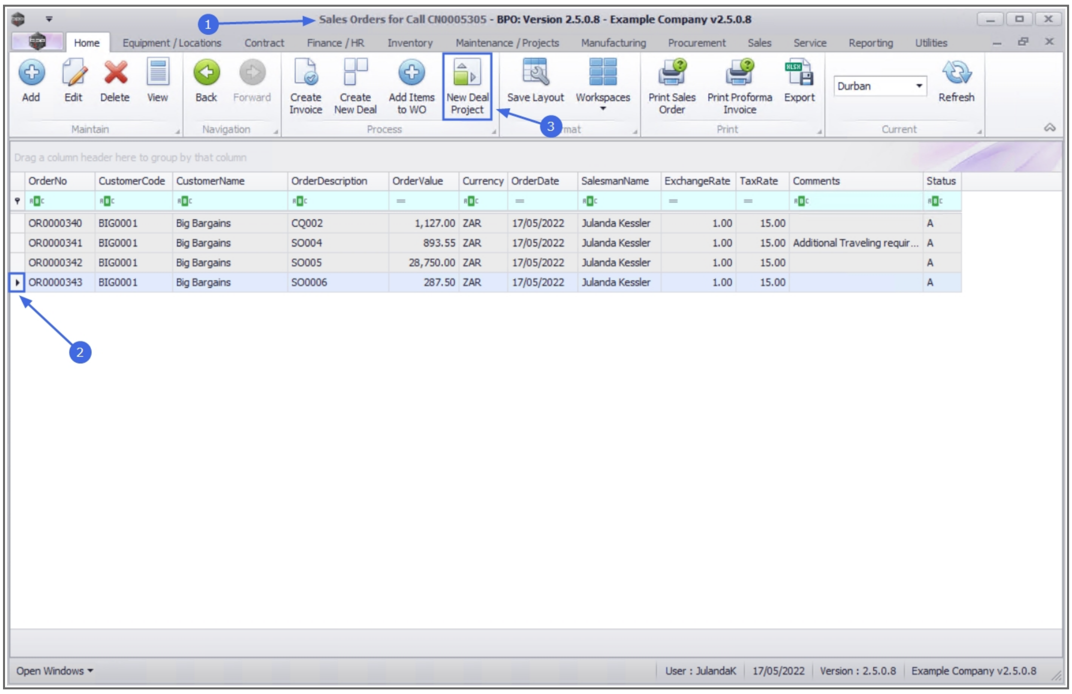
NEW DEAL PROJECT

- The New Deal Project sales process will create a Project for work to be done and invoiced upon completion.

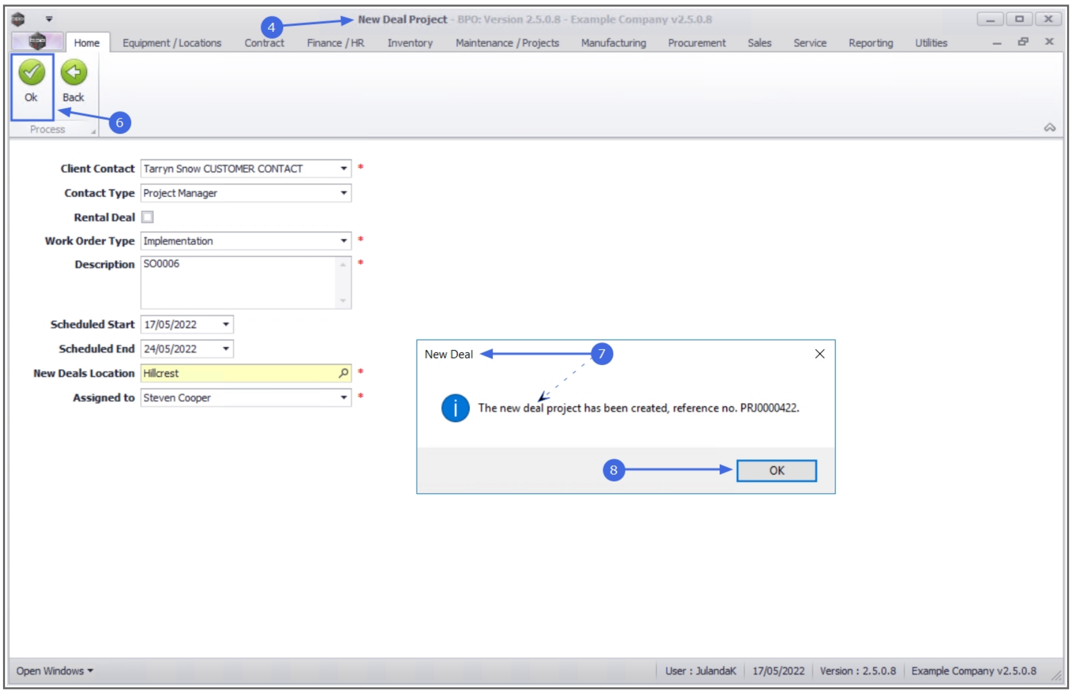
- Converting a Sales Order to a New Deal Project will create a new Project, and any parts and / or services listed on the Sales Order will be requested.
- This process begins from the Sales Orders for Customer Listing screen.
- You can also convert to a New Deal Project from the Sales Orders Listing screen.

- From the ***Sales Orders for Customer [****Customer Code****]*** screen,
- Click on the ***row*** of the ***Sales Order*** you wish to convert to a New Deal Project.
- Click on ***New Deal Project***.

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



- "The New Deal Project screen will be displayed. " on page 3
- Complete the New Deal Project Details as required,
- Click on ***OK*** to save the new deal details.
- When you receive the ***New Deal*** message to confirm;
  - ***The new deal project has been created, reference no.*** *[reference number]*
- Click on ***OK***.



- You will return to the ***Sales Order*** screen.

For a detailed handling of this topic refer to Orders - Convert to New Deal Project

PRINT SALES ORDER / PRINT PROFORMA INVOICE

You will be able to ***Print a Sales Order*** and / or ***Print a Proforma Invoice*** from the;

- Sales Orders screen
- Add New Customer Order screen
- Edit Customer Order screen
- View Customer Order screen

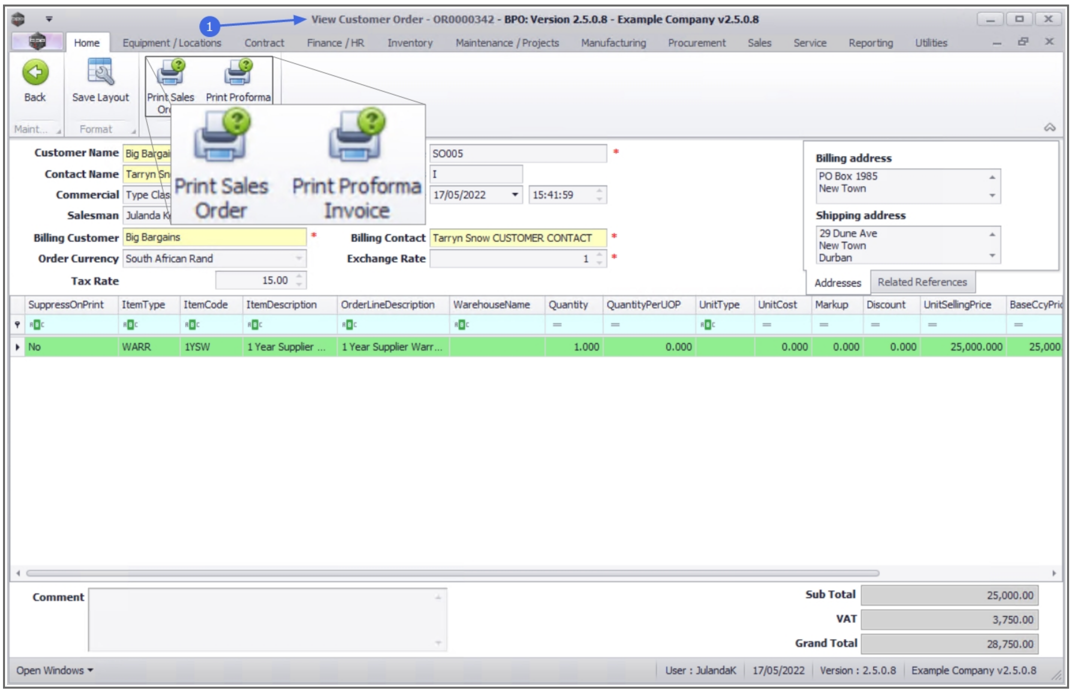
For this example, the proforma invoice will be printed from the ***View Customer Order - [Order Number]*** screen. The same procedure can be followed from any of the above mentioned screens.

- From the ***View Customer Order - [Order Number]*** screen,
- Click the print option that you require.

Print Sales Order

Print Proforma Invoice

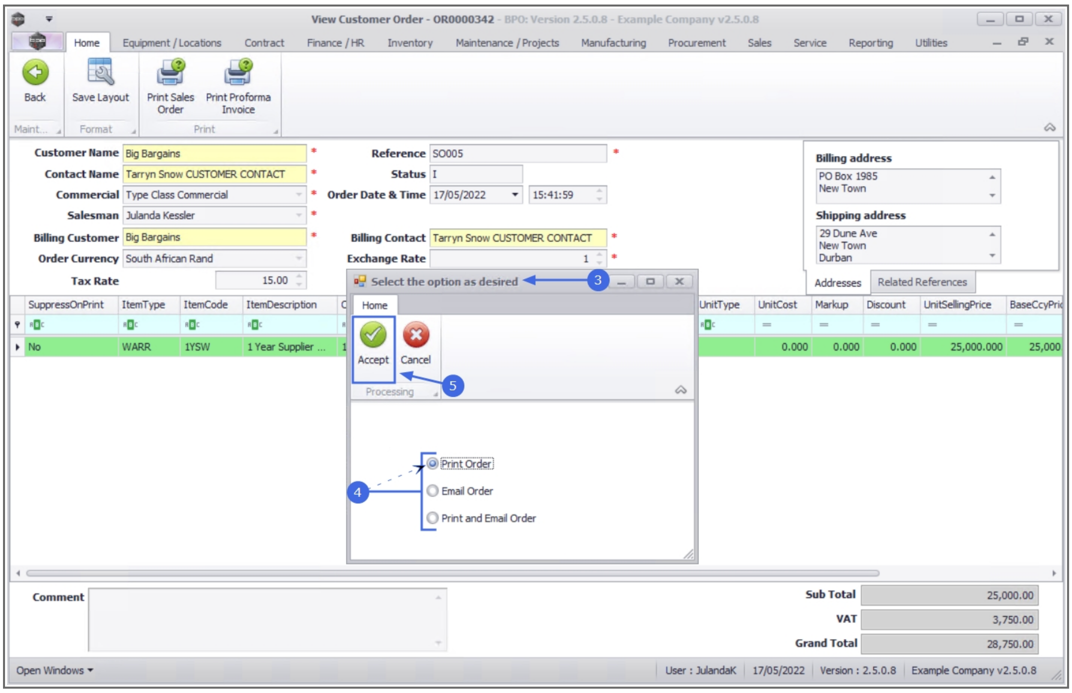
  - The example has ***Print Sales Order*** selected.



- The ***Select the option as desired*** message will display.
- Click on the ***radio button*** to select either ***Print Order***, ***Email Order*** or ***Print and Email Order***.

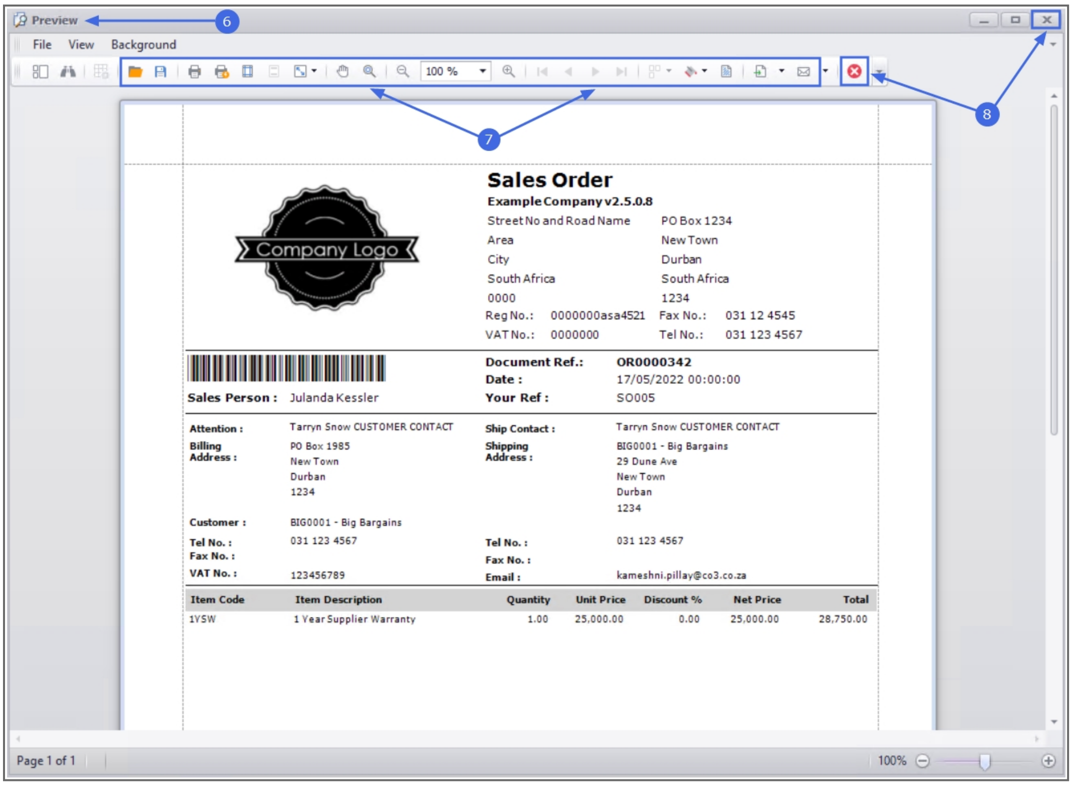
> When selecting to *Email the Quote*, the quote will be emailed via the *BPO Email Service* on the server and **not** from MS Outlook.

  - The example has ***Print Order*** selected.
- Click on ***Accept*** to proceed.



- The Sales Order or the Proforma Invoice (this will depend on the print option you made earlier) will display in the ***Preview*** screen.
- You can make cosmetic changes to the document, as well as ***Save***, ***Print***, ***Export***, ***Add a Watermark*** or ***Email*** the Sales Order or Proforma Invoice.
- Click on ***Close*** to return to the ***Sales Quotes for Customer*** screen.

For a detailed handling of this topic refer to Orders - Print Sales Order or Orders - Print Proforma Invoice


Preview
6
File
View
Background
100 %
7
8
Sales Order
Example Company v2.5.0.8
Street No and Road Name
PO Box 1234
Area
New Town
City
Durban
South Africa
South Africa
0000
1234
Reg No.: 0000000asa4521
Fax No.: 031 12 4545
VAT No.: 0000000
Tel No.: 031 123 4567
Company Logo
Document Ref.: OR0000342
Date : 17/05/2022 00:00:00
Sales Person : Julanda Kessler
Your Ref : SO005
Attention : Tarryn Snow CUSTOMER CONTACT
Billing Address : PO Box 1985 New Town Durban 1234
Ship Contact : Tarryn Snow CUSTOMER CONTACT
Shipping Address : BIG0001 - Big Bargains 29 Dune Ave New Town Durban 1234
Customer : BIG0001 - Big Bargains
Tel No. : 031 123 4567
Fax No. :
VAT No. : 123456789
Tel No. : 031 123 4567
Fax No. :
Email : kameshni.pillay@co3.co.za
Item Code
Item Description
Quantity
Unit Price
Discount %
Net Price
Total
1YSW
1 Year Supplier Warranty
1.00
25,000.00
0.00
25,000.00
28,750.00
Page 1 of 1
100%

MNU.122.027