

## SALESNET – ADD OPTION TO REQUEST COPY OF TAX INVOICE / CREDIT NOTE

### 1 INTRODUCTION

Changes have been in SalesNet to allow customers request a copy of the tax invoice or credit note via email for a selected invoice or credit. The email is sent to the customer’s ‘invoice’ contact email address. Emails are sent out of head office print server.

### 2 BENEFITS

- ✓ Customers can self-serve

### 3 SETUP

This option is available to all sites on upgrade to 2019.1.

The below SalesNet configuration settings must be set up.

#### 3.1 OFFICIAL INVOICE EMAIL SUBJECT

A default email subject is provided on upgrade. The text is customisable.

recoverTimeframeMinutes	00
<b>OfficialInvoiceEmailSubject</b>	Customer {{CustomerCode}} tax invoice / credit number {{InvoiceNo}}
MultiSiteDefGroup	DEFF

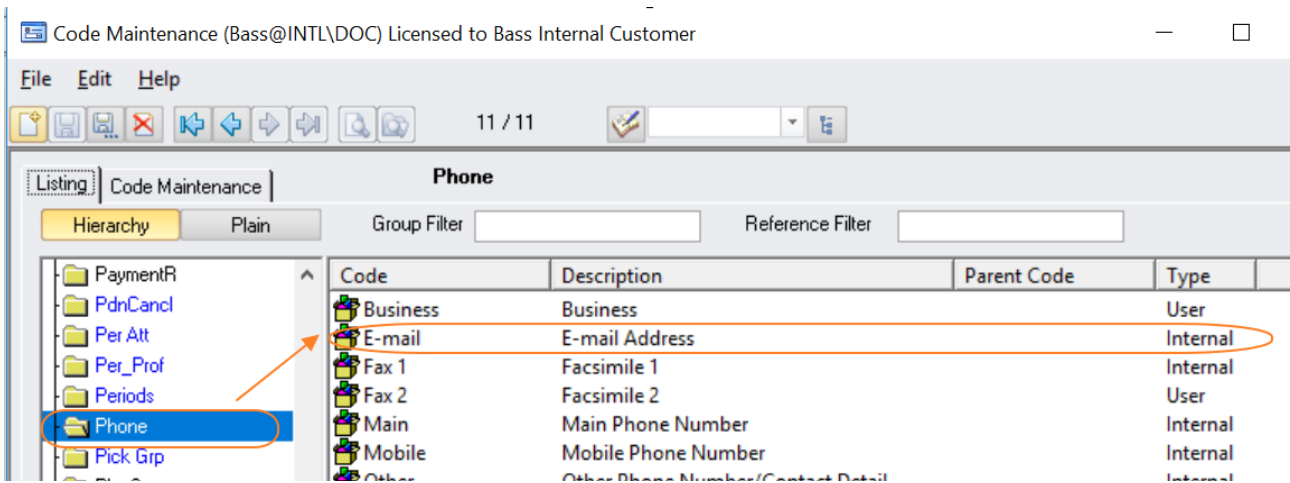
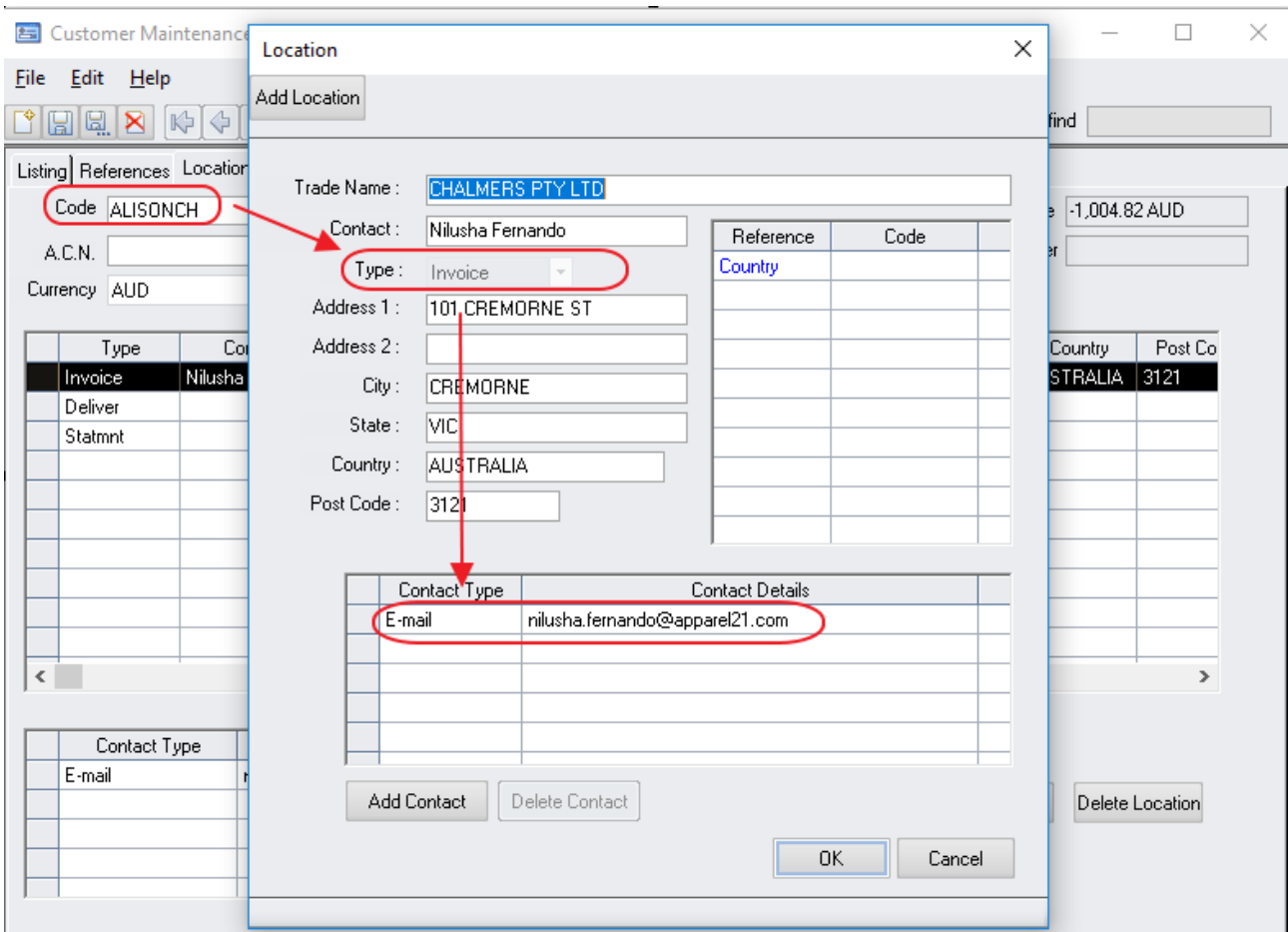
#### 3.2 OFFICIAL INVOICE EMAIL BODY

A default email body is provided on upgrade. The text is customisable.

FilterBySalesRep	false
<b>OfficialInvoiceEmailBody</b>	Attached is the Invoice / Credit for {{InvoiceNo}}
RecoveryTimeframeMinutes	00

#### 3.3 CUSTOMER MAINTENANCE – INVOICE EMAIL

An email address must be entered against the customer’s ‘Invoice’ email address. The email address must be entered against the ‘internal’ Email phone type.



### 3.4 PRINT SERVER

Print Server must be configured. The Print Server must have outlook installed for emails to be sent.

## 4 DESCRIPTION / USAGE

'Email official invoice' option added to *SalesNet / Account / Invoice* details page.

SalesNet New Order ▾ Unsubmitted 6 Account Admin Settings Nilusha Fernando ▾

YOUR LOGO HERE Customer: ALISON & CHALMERS [Change Customer](#)

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<b>YOUR REFERENCE</b> Nilusha 2	<b>TOTAL QTY</b> 12	<b>TOTAL</b> 2,268.00 AUD	<b>TOTAL RRP</b> 0.00 AUD
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Invoice 3522

INVOICE NUMBER 3522 Option to request copy of invoice → [Email official invoice](#) [Print friendly](#)

<b>ORDER NUMBER</b>	7603	<b>INVOICE QUANTITY</b>	12
<b>YOUR REFERENCE</b>	Nilusha 2	<b>GROSS</b>	2,520.00 AUD
<b>DATE</b>	20-Aug-2018	<b>DISCOUNT</b>	252.00 AUD
<b>DELIVER TO</b>	a aa a a	<b>TAX</b>	0.00 AUD
<b>CARRIER</b>	lpec	<b>DUE</b>	2,268.00 AUD
		<b>RRP</b>	0.00 AUD

'Email official credit' option added to *SalesNet / Account / Credit* page.



Customer: ALISON & CHALMERS

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YOUR REFERENCE	TOTAL QTY	TOTAL	TOTAL RRP
	2	126.00 AUD	320.00 AUD

Credit 529

CREDIT NUMBER 529

Option to request copy of credit →

[Email official credit](#) [Print friendly](#)

YOUR REFERENCE		CREDIT QUANTITY	2
DATE	20-Aug-2018	GROSS	140.00 AUD
DELIVER TO	a aa a a	DISCOUNT	14.00 AUD
CARRIER	lpec	TAX	0.00 AUD
CONNOTE		DUE	126.00 AUD
		RRP	320.00 AUD

When click on the option, the following dialog is prompted.

### Official Invoice email

**To** nilusha.fernando@apparel21.com

**Subject** Customer {{CustomerCode}} tax invoice / credit number {{InvoiceNo}}

**Body** Attached is the Invoice / Credit for {{InvoiceNo}}

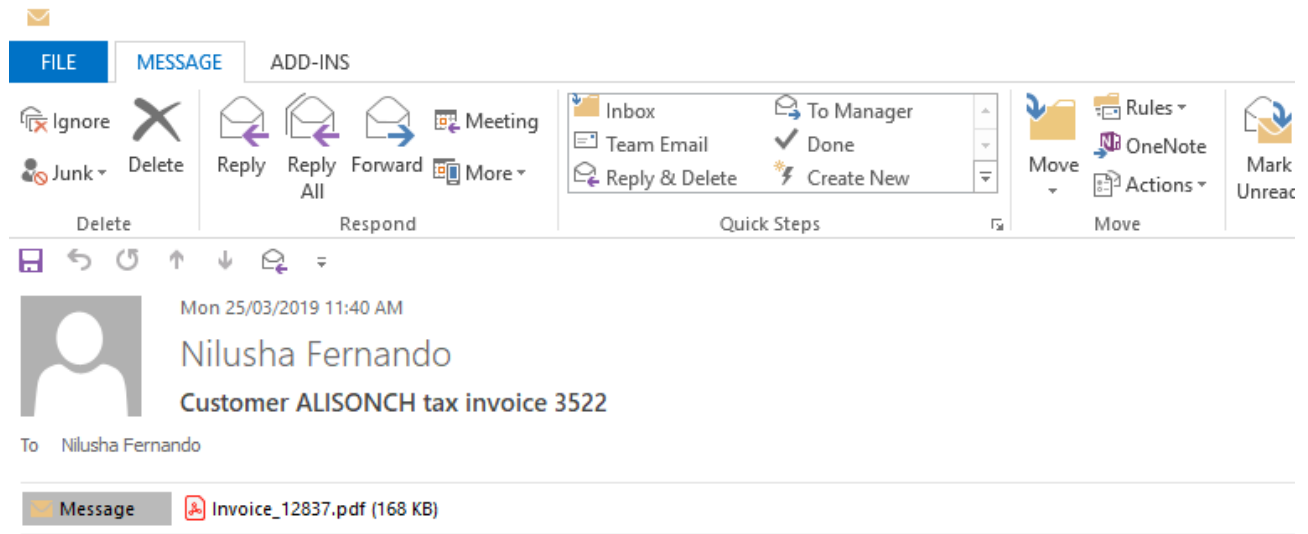
[Cancel](#) [Send](#)

The 'To' field defaults with the customer's invoice contact email address. This field is not editable.

The email subject and body defaults with the text supplied in the configuration settings. This is editable.

The email is sent via the print server and outlook installed on the print server. The sender address is the outlook sender address. The invoice / credit is added as an attachment to the sent email.

Eg: Sample email



Attached is the Invoice for 3522