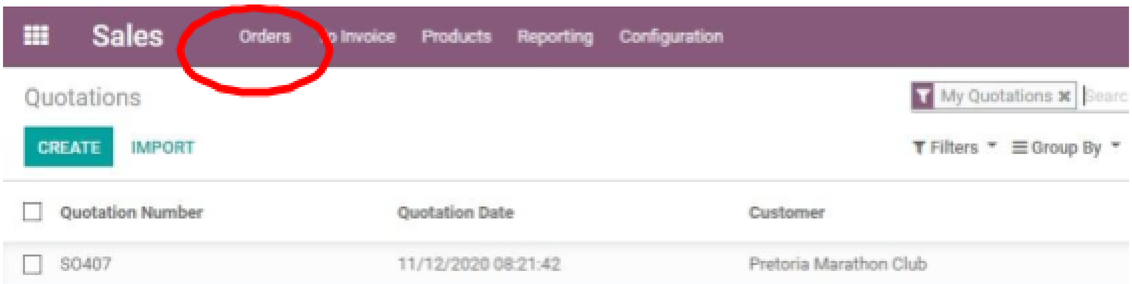
Training Manual

Humint O Lite
Version 16

Sales

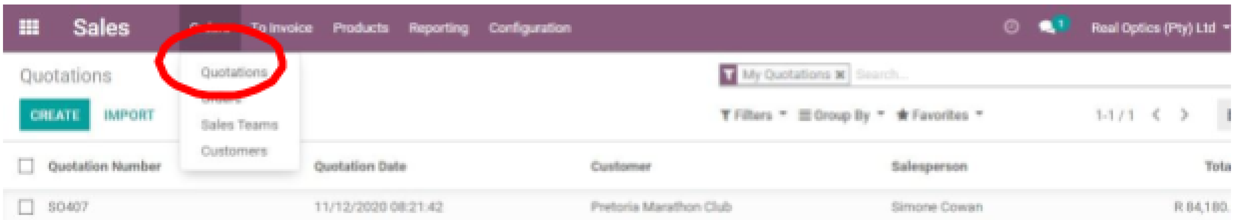
When you open the sales module, it will open with quotations.

Quotations



These are merely quotations done and not validated invoices as yet.

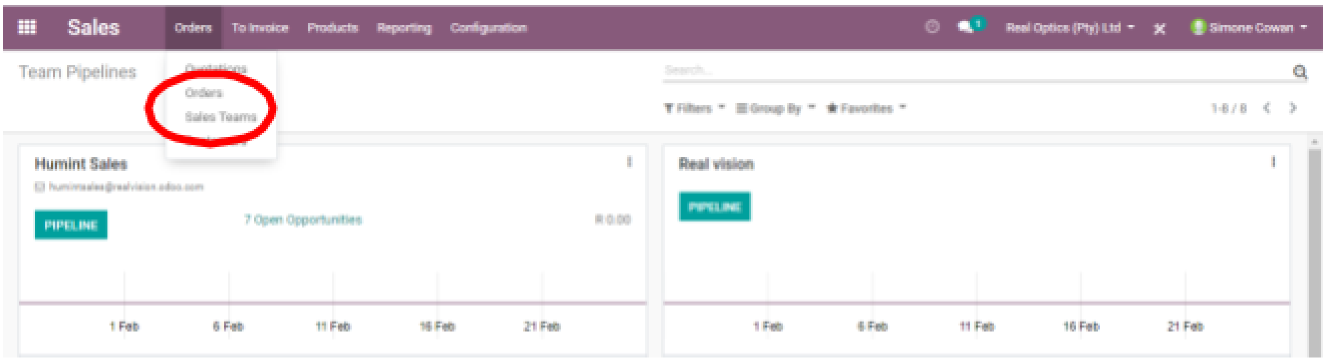
Orders



Orders will feature the actual sales orders created.

Sales Teams

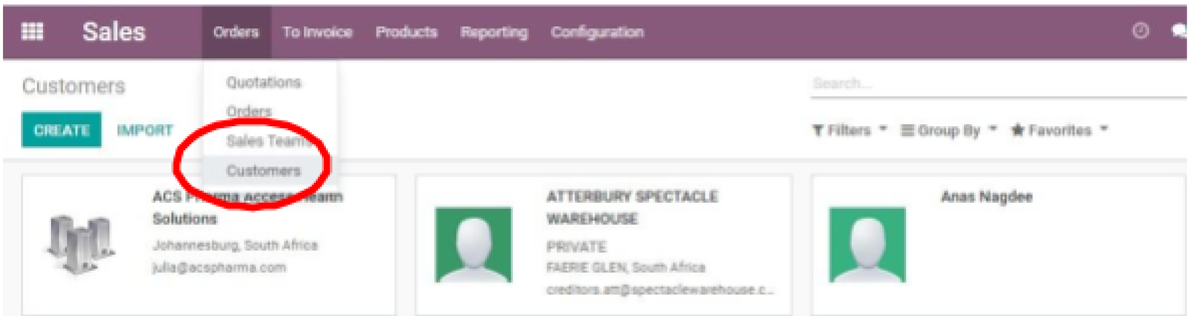
This will feature the **sales team's** setup in the CRM module.



Customers

This will take you to the contacts module, where the customers will be filtered.

You can also create a customer from here by clicking on CREATE



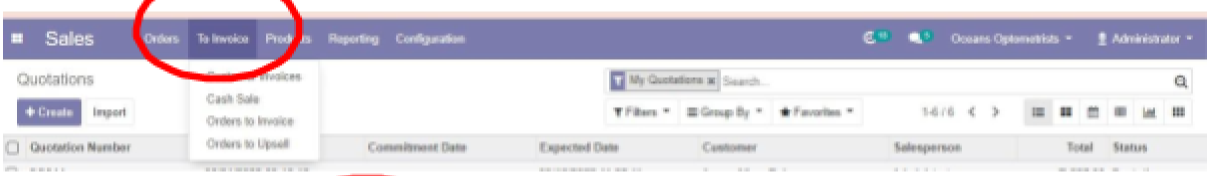
To Invoice

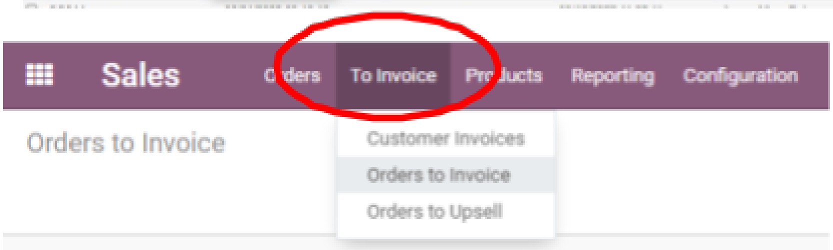
Customer invoices

Here the customer invoices will be listed. You can also sort it according to customer or invoice number by clicking on the column title or applying a filter.

OR – You can click on CASH SALE and create an invoice from there.

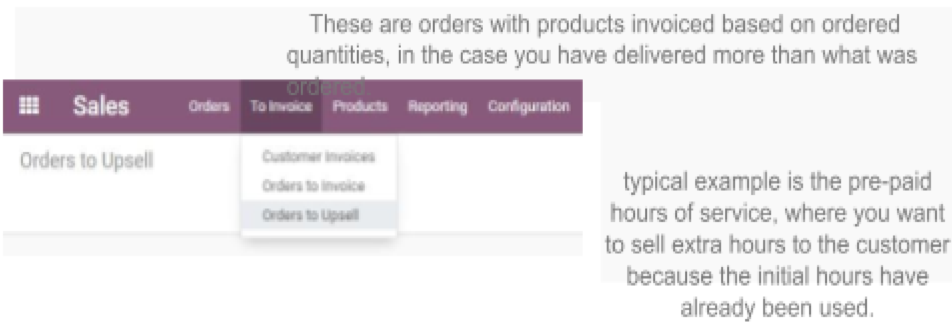
Orders to invoice





Here the orders that haven't been invoiced will be listed.

Orders to Upsell



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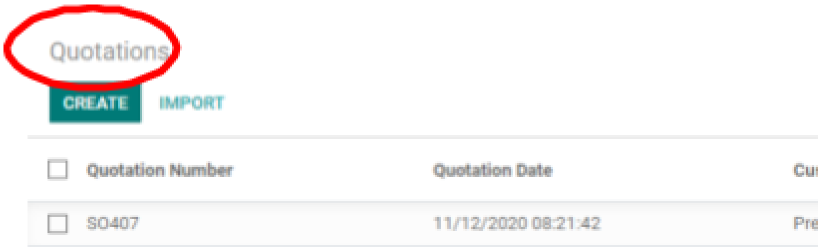
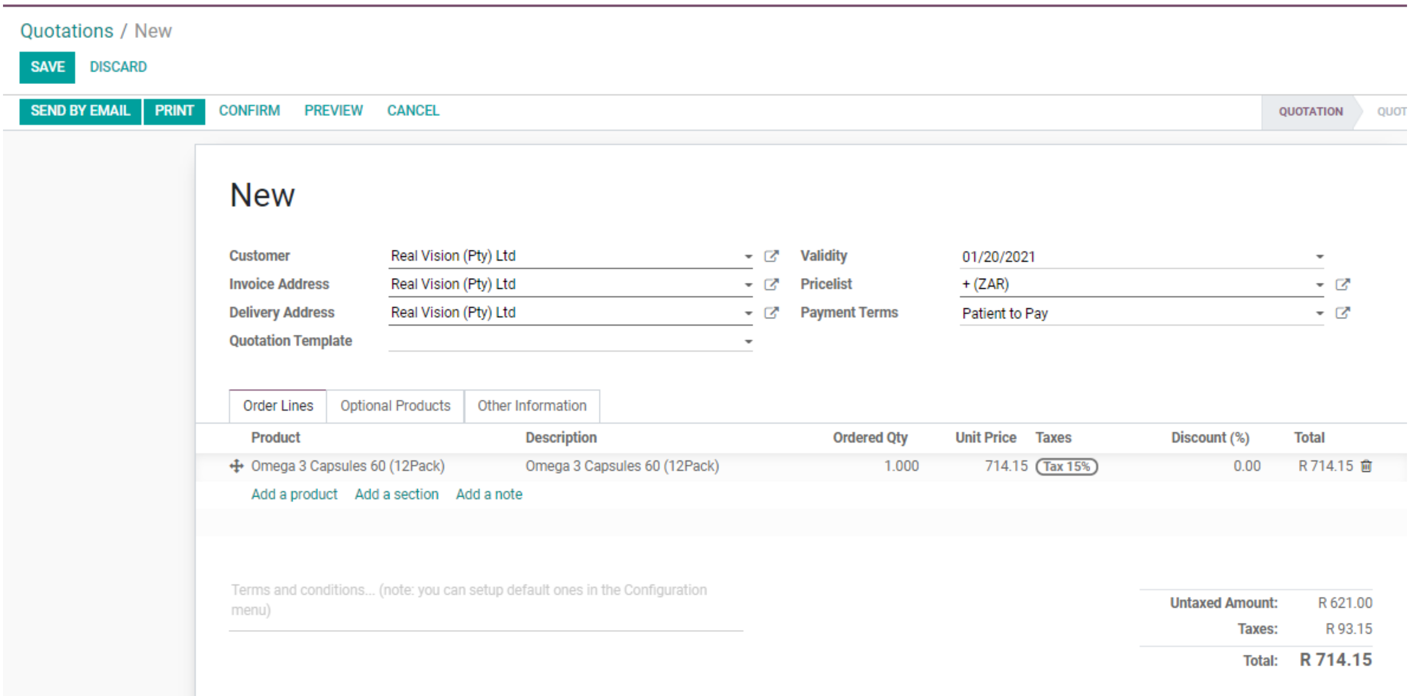
Creating a Quotation – Sales order – Customer invoice

This will be used for selling stock items or not scripted spectacles. These cash sales are not to be submitted to medical aid.

Click on CREATE a quotation



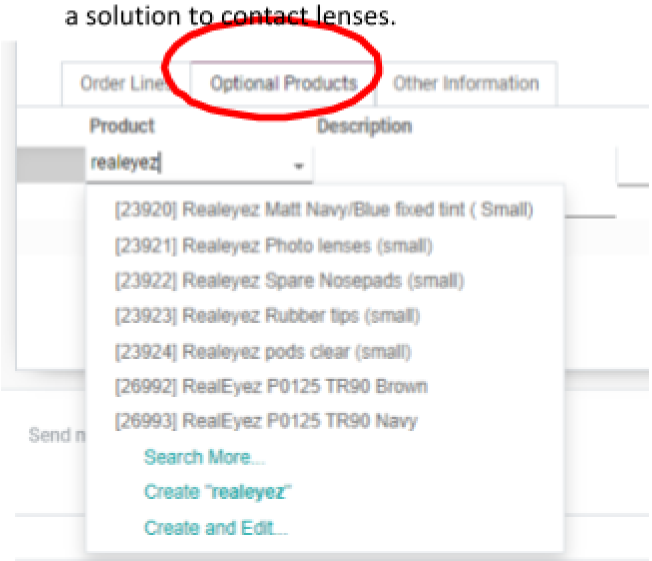
Create the quotation



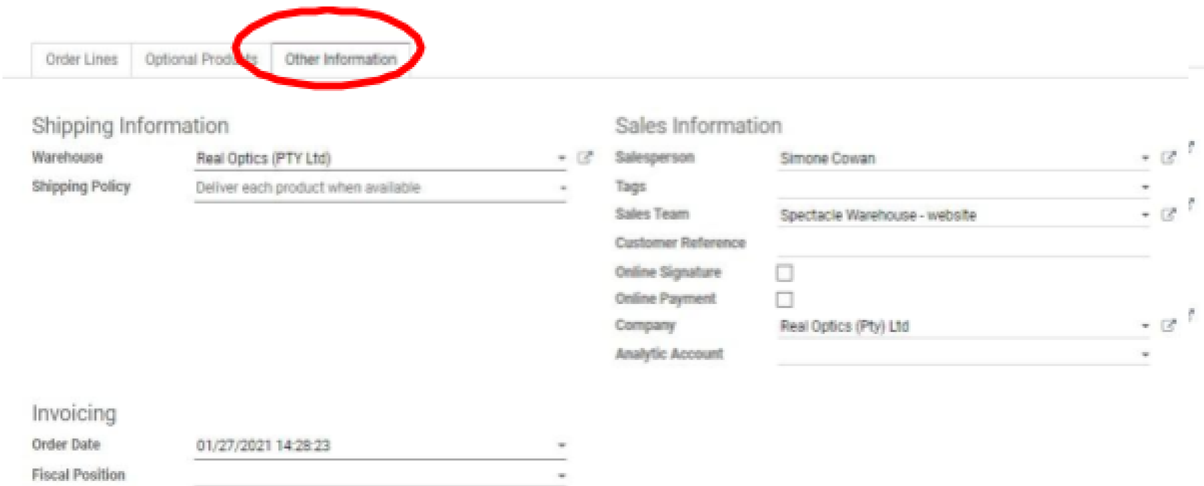
- Customer – Choose the customer by typing the name and selecting from the dropdown list. If not featured, Create and edit
- Invoice address – Will be Auto-filled when customer in selected
- Delivery address - Will be Auto-filled when customer in selected
- **Quotation template** – Here, you can create templates to choose from and select from the dropdown list, OR you can leave empty and create from scratch. (Ideal for walk in patients and quick quotes)
- Validity – Select for how long you want the quote to be valid
- Pricelist – If you have numerous pricelists listed, you can choose which Pricelist you want to use.
- Payment terms – Will be patient to pay because medical aid submissions cannot be done here

- Order lines – Add a line
  - Add a product and adjust price, VAT, Qty, and so on
- Optional products

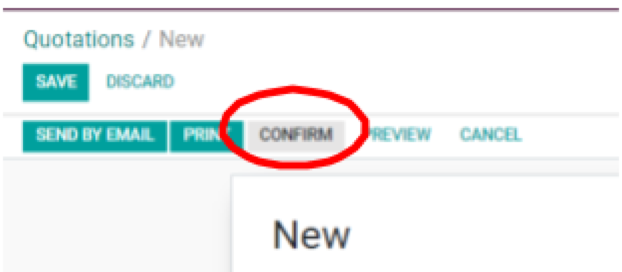
  Here you can add additional products that the customer might be interested in. E.g., Adding a solution to contact lenses.



- Other information – Additional information can be entered here



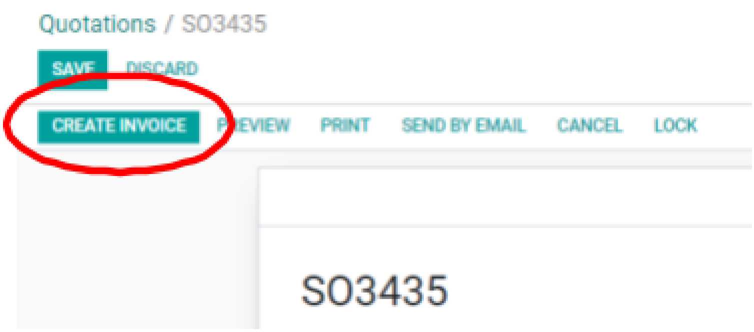
- Go back to order lines
- Click on CONFIRM

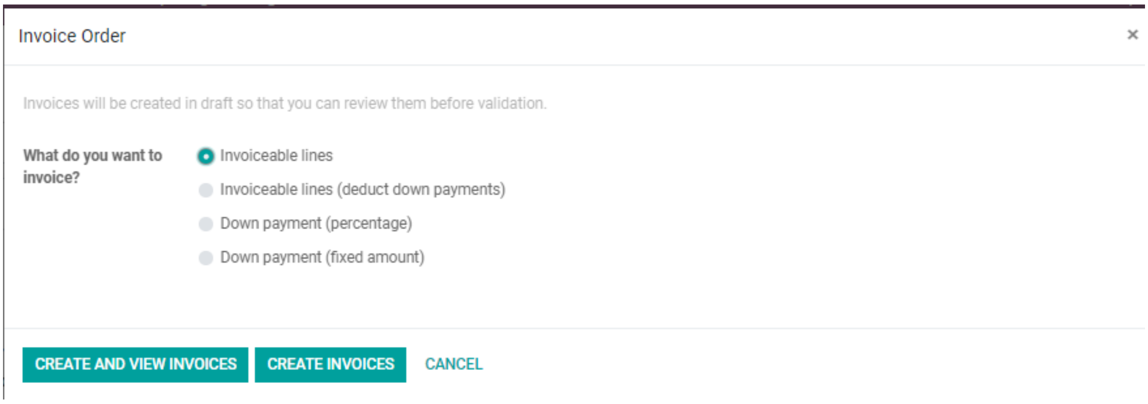


- Once you have confirmed the order, you will receive a sales order number.

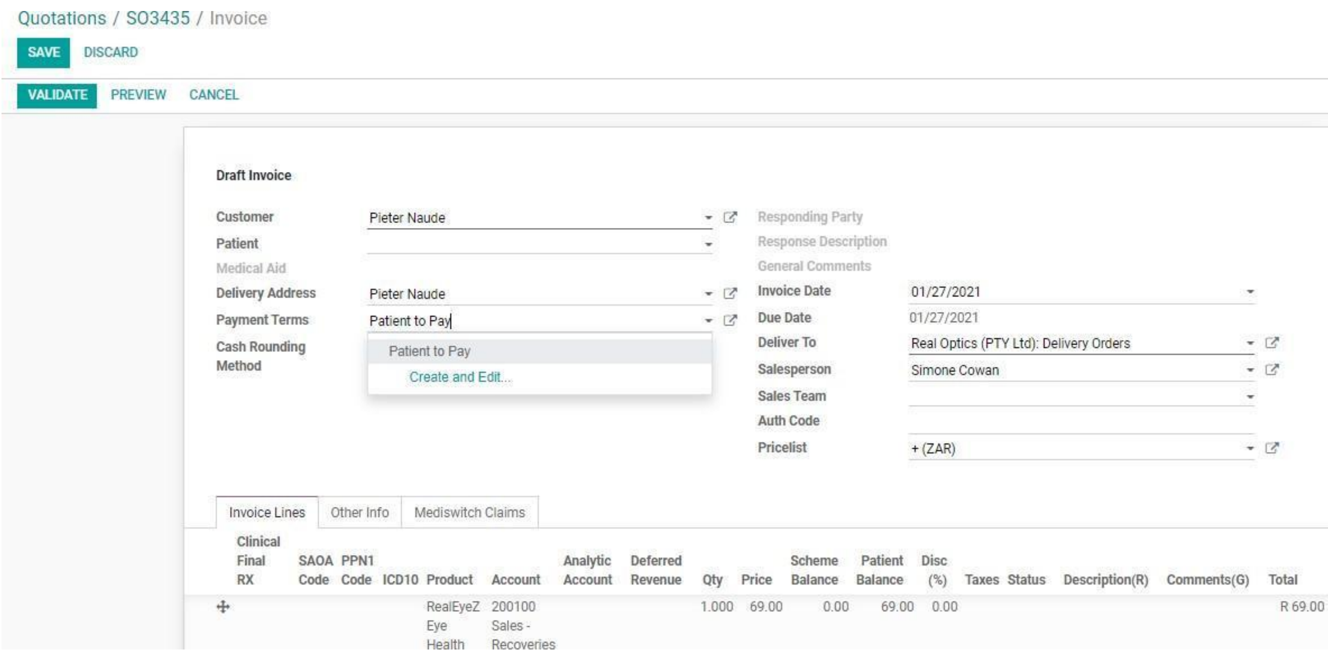
SO3435- Sales order number

- Click on create invoice



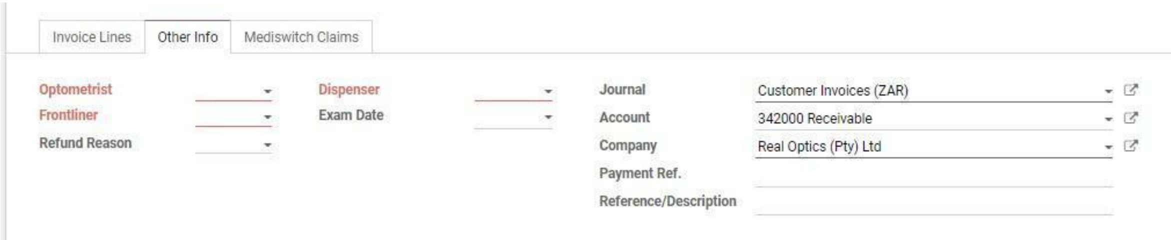


- Click on CREATE AND VIEW INVOICES
- Open and edit the draft invoice

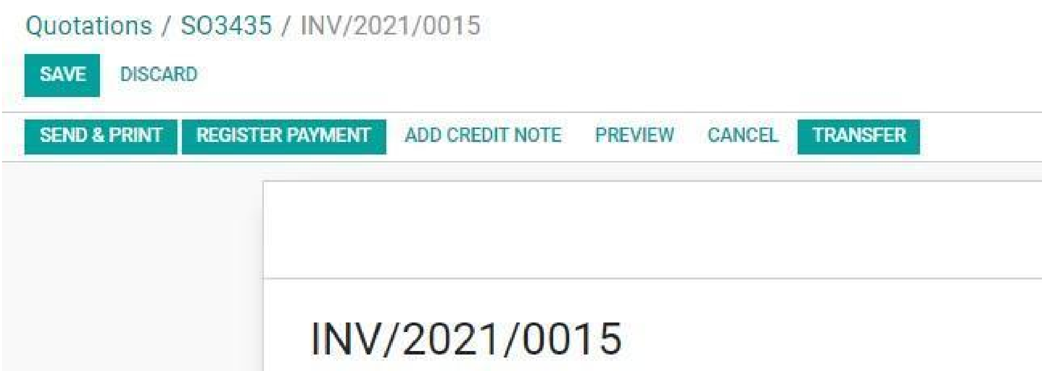


- Make sure you enter the payment terms – Patient to pay
- Check the Product, taxes, and quantities before validating your invoice.
- Enter the correct IDC code if not already assigned to the Product if no ICD code. Choose N/O

- Under Other info, Enter the dispenser, frontline, and Optom names

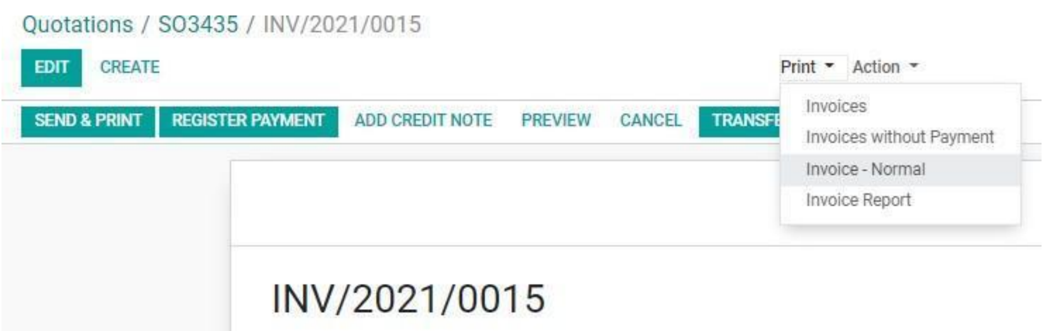


- Click on VALIDATE



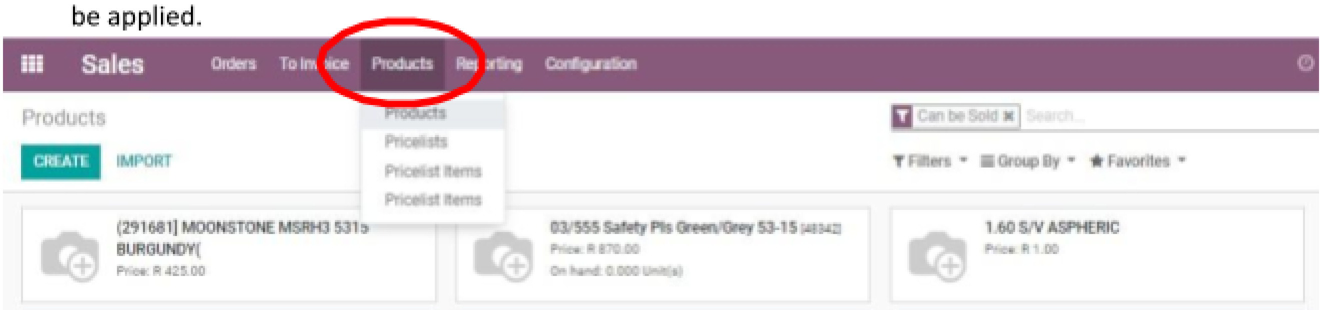
- From here, you will receive the invoice number
- You can Add a credit note if you want to credit this invoice
- Register a payment

Save and Print / Send the invoice by clicking on SAVE. Then you can click on SEND AND PRINT, OR you can click on print in the Top middle of the screen and choose your print option.

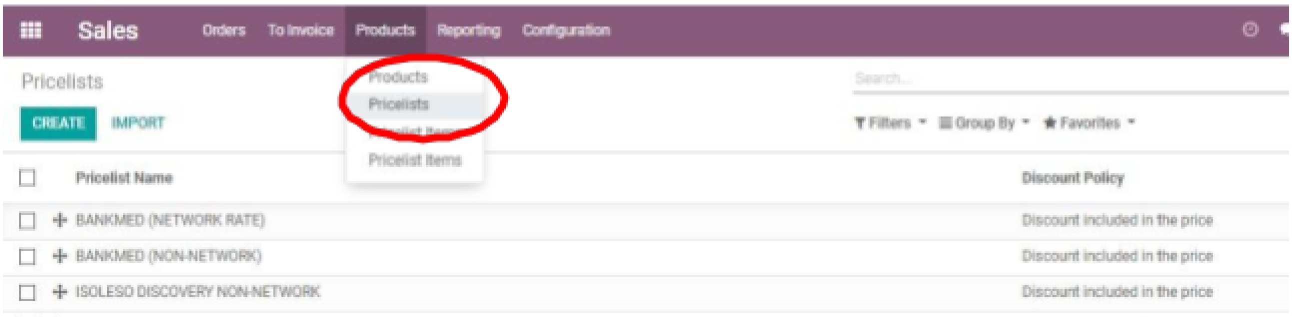


Products

Here the products will be listed as in the **Inventory** module. The automated filter - CAN BE SOLD, will be applied.



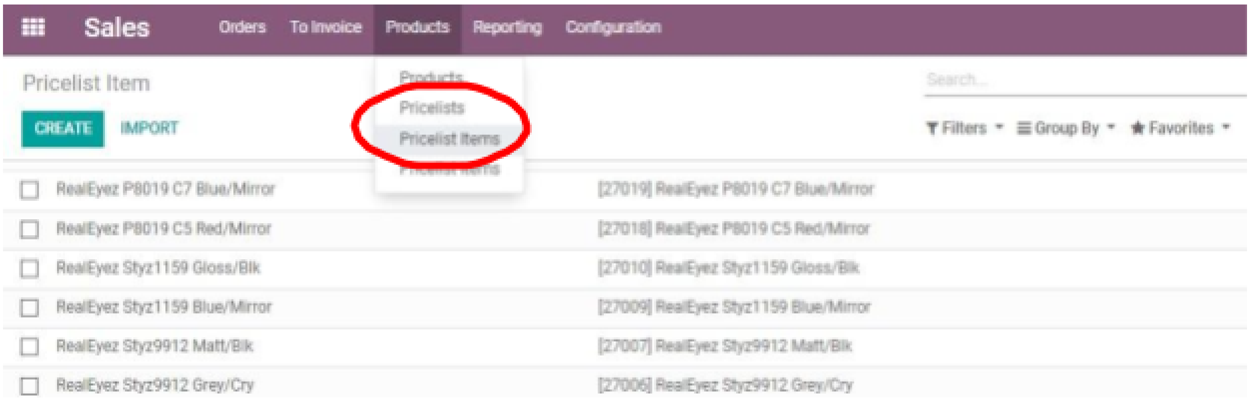
Pricelists



The **pricelists** will be listed. You can add a price file by clicking on CREATE or you can IMPORT a Price file.

Pricelist Items

Here all the products will be listed. This will be fees, services, inventory, add-ons. Basically, anything that can be invoiced or was imported from a price file.



Reporting

Sales