

Training Manual

Humint O Lite Version 16

Sales



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

Quotations

	Sales	Orders	o Invoice	Products	Reporting	Configuration		
Quota	ations							My Quotations 🕱 Searc
CREA	IMPORT							▼ Filters ▼
🗌 Qu	otation Number		Q	uotation Dat	le		Customer	
□ so	407		1	1/12/2020 0	8:21:42		Pretoria Marathon Cl	ub

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

Orders

III Sales	To invok	e Products Reporting	Configuration	0 🛋	Real Optics (Pty) Ltd 👻
Quotations	Quotations		T My	Quotations # Search	
GREATE IMPORT	Sales Teams		Y Filter	a * ≣ Group By * ★ Favorites *	1471 < >
Quotation Number	Customers	Quotation Date	Customer	Salesperson	Tota
S0407		11/12/2020 08:21:42	Pretoria Marathon Club	Simone Cowan	R 84,180.

Orders will feature the actual sales orders created.

Sales Teams

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

	I Sales	Orders	To invoice	Products	Reporting	Configuration						••	Real Optics (Pty) Ltd 🔫		Simone	Cowr	n -
Т	eam Pipelines	Owner	ions															Q
	(Orders Sales	Teams						τ Filters * Ξ	iroup By	* 🛊 Favorites *					1-8 / 8	<	>
	Humint Sales						1		Real vision								I	l
	humintaalea@realvlaion.o PIPELINE	doo.com	7 Open Oj	pportunities			R 0.00		PPELNE									
ſ	1 Feb	6	Feb	11 Feb	16.6	ieb 21	Feb	1		Feb	6 Feb	11 Fel	16	Feb	21	Feb		

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.

ce de la companya de							
To Invoice Products	Reporting Config	pration			🗧 💶 Oceans Opto	netists = 🛔	Administrator =
Color involces			Wy O	Justations # Search			Q
Cash Sale Orders to Invoice			TFilm	• ≡ Group By • ★ Fave	orites * 1-6/6 < >		III <u>111</u> III
Orders to Upsell	Commitme	nt Date	Expected Date	Customer	Salesperson	Total	Status
Crders	To Invoice	Pro Jucts	Reporting	Configuration			
е	Customer	Invoices					
	Orders to	Invoice					
	Orders to	Upsell					
	To Invoice Produces Cash Sale Orders to Invalce Orders to Upsell C ders	Centre of the second of the se	Centre in the interview of the interview	Content to linvoice Prof. Ls. Reporting Configuration Cash Sale Orders to linvoice Image: Configuration Image: Configuration Cash Sale Orders to linvoice Orders to linvoice Image: Configuration	To Invoice Profile Reporting Configuration Cash Sole Orders to Upsel Image: Cash Sole Orders to Upsel Image: Cash Sole Orders to Upsel Image: Cash Sole Orders to Upsel C ders To Invoice Prov Jucts Reporting Configuration C Customer Invoices Orders to Invoice Orders to Upsell	To Invoice Prof / a Reporting Configuration Image: Configuration Image: Configuration Cash Sole Consentiones Image: Configuration Image: Configuration Image: Configuration Image: Configuration Conterns to Upuel Consentiones Expected Date Configuration Image: Configuration Conterns to Upuel Consentiones Configuration Image: Configuration Image: Configuration Conterns to Upuel Conterns to Upuel Conterns to Upuel Image: Configuration Image: Configuration	To Invoice Prof us Reporting Configuration Image: Configuration Image: Configuration Image: Configuration Image: Configuration C clears Solars Consumityment Date Expected Date Consumityment Date Solars Total C clears To Invoice Products Reporting Configuration Total C Clears to Invoice Orders to Invoice Orders to Upsell Configuration

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

Orders to Upsell

These are orders with products invoiced based on ordered quantities, in the case you have delivered more than what was

III Sales	Orders	To Invoice	Products	Reporting	Configuration
Orders to Upsell		Customer Orders to	Invoices Invoice		
		Orders to	Upsell		

typical example is the pre-paid hours of service, where you want to sell extra hours to the customer because the initial hours have already been used. A

HUMINT



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

Quotations CREATE IMPORT		
Quotation Number	Quotation Date	Cu
S0407	11/12/2020 08:21:42	Pre

Create the quotation

uotations / New						
SAVE DISCARD						
SEND BY EMAIL PRINT CONFIRM PREVIEW	/ CANCEL					
New						
Customer	Real Vision (Pty) Ltd	- 2	Validity	01/20/2021		•
Invoice Address	Real Vision (Pty) Ltd	- Z	Pricelist	+ (ZAR)		- 2
Delivery Address	Real Vision (Pty) Ltd	- Z	Payment Terms	Patient to Pay		- 2
Quotation Template		•				
Order Lines Opt	tional Products Other Information					
Product	Description		Ordered Qty	Unit Price Taxes	Discount (%)	Total
🕂 Omega 3 Capsule	s 60 (12Pack) Omega 3 Capsules 60 (12Pack)		1.000	714.15 (Tax 15%)	0.00	R 714.15 💼
Add a product A	Add a section Add a note					
Terms and conditions menu)	s (note: you can setup default ones in the Configuration				Untaxed Amount:	R 621.00
					Taxes:	R 93.15
					Total:	R 714.15

- Customer Choose the customer by typing the name and selecting from the dropdown list.
 If not featured, Create and edit
- \circ $\;$ Invoice address Will be Auto-filled when customer in selected
- \circ $\;$ 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)
- \circ $\;$ 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



- $\circ \quad \text{Order lines}-\text{Add a line}$
 - Add a product and adjust price, VAT, Qty, and so on
- \circ Optional products

Here you can add additional products that the customer might be interested in. E.g., Adding



• Other information – Additional information can be entered here

shipping Infor	mation		Sales Informati	on	
larehouse	Real Optics (PTY Ltd)	• 3	Salesperson	Simone Cowan	- 0
hipping Policy	Deliver each product when available		Tags		
			Sales Team	Spectacle Warehouse - website	- 0
			Customer Reference		
			Online Signature		
			Company	Paul Online (Phy) 11d	
			Analytic Account	Hear Oppics (P(y) Lite	
voicing					
der Date	01/27/2021 14:28:23	-			
scal Position		-			
o G	o back to order lines				
~	ick on CONFIDM				





SO3435- Sales order number

CREATE INVOICE	PEVIEW PRINT SEND BY EMAIL CANCEL LOCK	
voice Order	SO3435	x
ivoices will be created	in draft so that you can review them before validation.	
/hat do you want to	Invoiceable lines	
voice?	 Invoiceable lines (deduct down payments) 	
	Down payment (percentage)	
	•(

o Click on CREATE AND VIEW INVOICES

o Open and edit the draft invoice

E PREVIEW CANCEL					
Draft Invoice Customer	Pieter Naude	- 2	Responding Party		
Patient Medical Aid		*	Response Description General Comments		
Delivery Address	Pieter Naude	• 2	Invoice Date	01/27/2021	-
Payment Terms	Patient to Pay	- 2	Due Date	01/27/2021	
Cash Rounding	Patient to Pay		Deliver To	Real Optics (PTY Ltd): Delivery Orders	- 6
Method	Create and Edit		Salesperson	Simone Cowan	- [
			Sales Team		*
			Pricelist	+ (ZAR)	÷ [
				- (
Invoice Lines	Other Info Mediswitch Claims				
Clinical Final SAO	PPN1 Analytic Deferred Code ICD10 Product Account Account Revenue	Qty	Scheme Patien Price Balance Balance	Disc (%) Taxes Status Description(R) Comments(G) -
in cour					

- 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



ptometrist	*	Dispenser	•	Journal	Customer Invoices (ZAR)	- 6
rontliner		Exam Date		Account	342000 Receivable	- 0
efund Reason				Company	Real Optics (Pty) Ltd	- 0
				Payment Ref.		
				Reference/Description		
Click on VAI	LIDATE					

HUMINT

TRANSFER

PREVIEW CANCEL

INV/2021/0015

ADD CREDIT NOTE

o From here, you will receive the invoice number

REGISTER PAYMENT

- \circ $\;$ You can Add a credit note if you want to credit this invoice
- Register a payment

SEND & PRINT

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.

SEND & PRINT	REGISTER PAYMENT	ADD CREDIT NOTE	PREVIEW	CANCEL	TRANSFE	Invoices Invoices without Payment
						Invoice - Normal
						Invoice Report

Products

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



Pricelists

III Sales Orders To Invoice	Products Reporting Configuration	0 •						
Pricelists	Products	Search						
CREATE IMPORT	Pricelists	¥ Filters ∽ III Group By ∽ 🚸 Favorites ∽						
Pricelist Name	Pricelist Items	Discount Policy						
BANKMED (NETWORK RATE)		Discount included in the price						
BANKMED (NON-NETWORK)		Discount included in the price						
ISOLESO DISCOVERY NON-NETWORK		Discount included in the price						

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.

	Sales	Orders	To Invoice	Products	Reporting	Configuration	
Pric	elist Item			Products			Search
CR	EATE		(Pricelist	s Items		▼ Filters ▼
	RealEyez P8019 C7	Blue/Mirror		Preenat	nerfis	[27019] RealEyez P8019 C7 Blue/Mirror	
	RealEyez P8019 C5	Red/Mirror				[27018] RealEyez P8019 C5 Red/Mirror	
	RealEyez Styz1159 (Gloss/Blk				[27010] RealEyez Styz1159 Gloss/Blk	
	RealEyez Styz1159 I	Blue/Mirror				[27009] RealEyez Styz1159 Blue/Mirror	
	RealEyez Styz9912	Matt/Blk				[27007] RealEyez Styz9912 Matt/Blk	
	RealEyez Styz9912 (Grey/Cry				[27006] RealEyez Styz9912 Grey/Cry	

Reporting

Sales

III Sales	Orders	To Invoice	Products	Reporting	Configuratio	ı							0	1	Real Op	tics (Pty) Lte	d 🕶
Sales Analysis				Sales					Search								
									T Filters	👻 🋗 Time Rai	nges 👻 ★ Fa	avorites 👻					
Measures * Group By * 🔟 🗠 😍																	
1																	
60,000.00																	
40,000.00																	
-20,000.00																	
17 Nov 2020 22 Nov 2020 27 Nov 2020 02 Dec 2020 07 Dec 2020 12 Dec 2020 17 Dec 2020 22 Dec 2020 27 Dec 2020 01 Jan 2021 06 Jan 2021 11 Jan 2021 16 Jan 2021 :																	
Total Sales		Untaxed Tota	I	Orde	rs		Average C	rder		Days to Conf	irm			Sales T	eams		
R 84.25k		R 73.27k	1	2			R 42.1	3k		0.00 day	/(s)						