

SOP Customer Ref Search

Bespoke Process

A new menu option captioned 'Find by Cust Ref' will be added to the SOP / Invoicing Processing Action Menu.

This will invoke a form and process operating similarly to the existing 'Find Document' process but will enable the user to locate a document at any status ('Document' through to 'Credit Note') by reference to the Customer Reference field. The search will work across all documents and all accounts.

Where several documents matching the customer reference supplied by the user exist, these will be presented in a grid, where the user may select the appropriate document. On selection, the process will navigate to the appropriate Account and Document, at which point the user may continue processing as required.

SOP Customer Ref Search - £190.00

Annual Maintenance and Support - £50.00