RB-ERP Tabs on Customer Record

1. There are several tabs available from the Company record, designed to display data from RB-ERP. Click More.

2. Click Orders.
3. All the Orders for this Company are displayed. You can click to open any Order.

4. The Order details are shown, including the Order Lines.
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5. From the Order screen you can also view Notes or Invoices for the Order.

6. All the Invoices are displayed. You can also open the Invoice records to see more details.
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7. From the Invoice screen you can also view any comments that may have been added in RB-ERP.

8. From the Company record you can also display any Quotations linked to this Company.
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9. Click to open any Quotation.

10. You can also add a new Quotation from CRM. Click New.
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11. The RB-ERP Quotation screen is displayed. You can enter and save your new Quote. When you do, that record will also be displayed in CRM.

12. Left Click CRM Company to return to CRM.
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13. If you are using the optional RMA application, RMA data is displayed here for the Company.

14. Left Click to open any RMA record.
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15. If you are tracking Warranty data in RB-ERP, it is displayed on the Warranty tab.

16. All the Invoices linked to the Warranty are displayed. Left Click to open the Invoice record.
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17. You can view the Invoice data.

18. You can also view the Company A/R Aging information.
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19. The A/R data is listed. You can open any record to view its details.