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Dolibarr User Guide | CRM

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1. Source: https://wiki.dolibarr.org/index.php/FAQ_What_is_Dolibarr_licence_%3F#:~:text=Dolibarr%20ERP%20CRM%20is%20an,%2C%20users%2C%20time%20and%20feature)

Introduction to the Dolibarr CRM Module

About Dolibarr

Dolibarr is an open-source software for Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM). It is appropriate for small or large businesses, individuals or freelancers, or non-profit organizations.

Dolibarr has 8 modules for ERP and CRM, including Human Relationship (HR), Finance & Billing, Product & Stock, CRM & Sales, and more. All Dolibarr modules work in conjunction with each other. Refer to Dolibarr's **website** for more information about Dolibarr's different modules and the associated applications.

Customizable Setup

Dolibarr has many customization options, allowing you to adjust the software to suit your specific business needs.

Dolibarr allows you to enable and use only the modules you need, so you can use all 8 at once, or even just one. Each module is divided into a suite of applications, which you can enable or not. You can further customize the applications by creating custom intake fields, such as additional contact information fields for customers.

There are hundreds of external add-on available through the **Dolistore**, so you can further customize the software.[1]

Free and Open-Source

Dolibarr is a free and open-source, so a large community of users, developers, and other contrib-utors are continually working on improving the software.This means that you can frequently

1. Source: https://www.dolibarr.org/

upgrade to new and improved versions. As a result of the consistent feedback and development efforts by the Dolibarr community, Dolibarr is a comprehensive software with an easy-to-navigate interface.

Many different companies can host Dolibarr since it is an open-source software. These companies provide support and custom development, making it more globally accessible[1].

Flexible Installation

You can install Dolibarr locally on your devices or you can access it on-line. It is available on all platforms and as a SaaS application, making Dolibarr user-friendly and accessible to many different users.[2]

About the Dolibarr CRM Module

Dolibarr's CRM module includes a suite of applications for managing relationships with customers, prospects, and vendors. Through this module, you can also manage all associated proposals, orders, contracts and subscriptions, shipments, and even interventions and tickets.[3] Dolibarr's customizable setup, free and open-source platform, and flexible installation options make the CRM module comprehensive and user-friendly.

Dolibarr User Guide | CRM provides detailed instructions on how to use the software's CRM module and associated applications.

1. Source: https://www.dolibarr.org/
2. Source: https://www.dolibarr.org/
3. Source: https://www.dolibarr.org/

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Chapter 1:
Third Parties Application

About Third Parties

The Third Parties application allows you to store and manage information about customers, prospects, and vendors (known as Third Parties in Dolibarr). Third Parties can be businesses, organizations, or individuals. Each one can have an unlimited number of alternate Contacts/Addresses. See *“Contacts/Addresses”* on page *5.*

You can add custom fields to Third Parties profiles so that you can capture all the information that is relevant to your business.

How to Use Third Parties

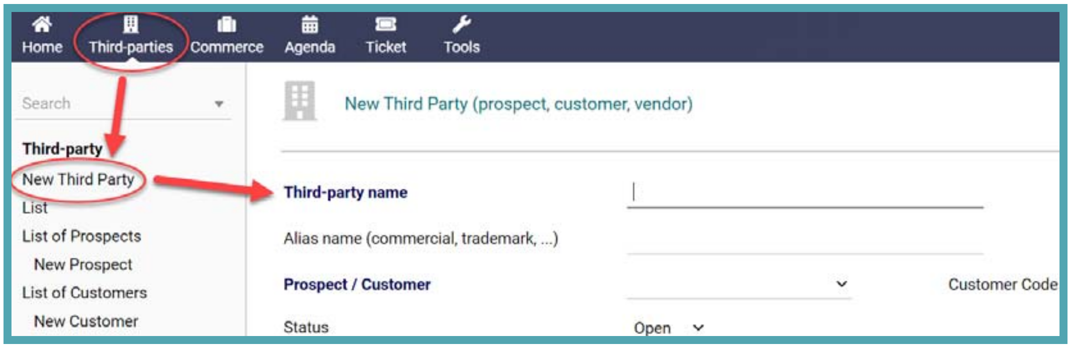
The following section explains how to use the Third Parties application, including how to add, edit, merge, and delete Third Parties. It also includes instructions on how to use the Contacts/Addresses feature of this application.

Adding New Third Parties

Third Parties can be customers, prospects, vendors, or a combination.

To add a new Third Party, perform the following steps:

1. Go to the Third Parties tab in the top navigation ribbon.
2. Select **New Third Party**.



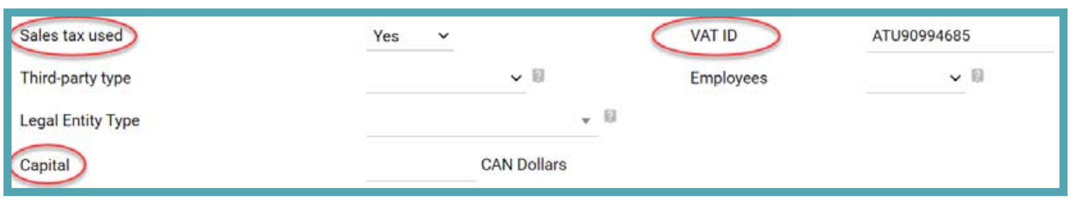
3. Complete the required fields (indicated in bold):

    a. Enter the Third Party's full name.

    b. Select an option from the Prospect/Customer drop down menu (Prospect, Pros-pect/Customer, Customer, or Not prospect, nor customer).

    c. Select an option from the Vendor drop down menu (Yes or No).

4. Complete the other optional fields, as desired, such as the ones shown in the screen shot below.[1]



5. Select **Create Third Party** to save the information.
The Third Party has been created and is accessible via the Third Parties tab.

Emailing Third Parties

You can email Third Parties directly from their profile in Dolibarr.

To email a Third Party, perform the following steps:
1. Go to the Third Parties tab in the top navigation ribbon.

2. Under Third Party, select **List** from the left-hand menu.
The list of Third Parties displays.

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1. **Tip:** You can add important financial information here, like preferred currency and tax details, as shown in the screen shot below. This information streamlines the billing process. See *"Doli-barr User Guide | Finance & Billing"* for more information on how to enable and config-ure the Third Parties application.

3. Select the Third Party you want to email.

4. Select **Send Email**.

5. Complete the required fields (indicated in bold):

   a. Select the Sender email address from the drop down menu.
   Note: This field automatically populates with the assigned sales representative's email address, but you can select a different email address from the drop down menu.

   b. Enter the Receiver email address(es).
   Note: You can select the main email address for the Third Party or that of a Contact/Address. See *"Contacts/Addresses"* on page 5.

   c. Enter the email topic.
   Note: This field automatically populates with *Information*, but you can enter a cus-tom topic.

6. Select **Send Email**.
   Your email is on its way to the Third Party.

Modifying Third Parties

You can modify Third Party information at any time.

To modify a Third Party's information, perform the following steps:

1. Go to the Third Parties tab in the top navigation ribbon.

2. Under Third Party, select **List** from the left-hand menu.
   The list of Third Parties displays.

3. Select the Third Party you want to modify.

4. Select **Modify**.

5. Change existing information or enter new information.

6. Select **Save**.
   Your modifications now show in the Third Party's profile.

Merging Third Parties

You can merge two Third Parties into a single one, avoiding duplicate entries.

To merge two Third Parties, perform the following steps:

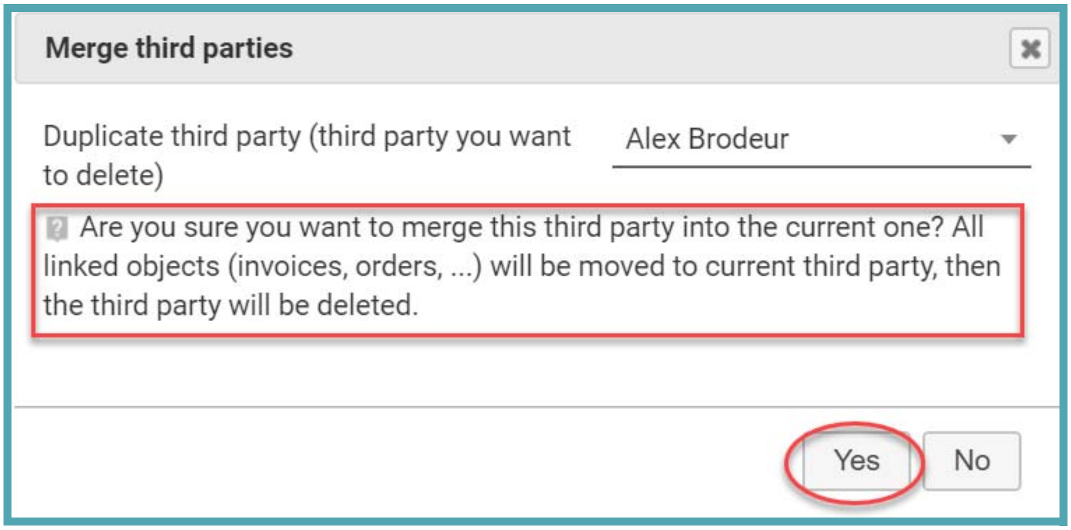
1. Go to the Third Parties tab in the top navigation ribbon.

2. Under Third Party, select **List** from the left-hand menu.
   The list of Third Parties displays.

3. Select the Third Party you want to merge with another one.
   Note: select the Third Party whose records you want to keep. The Third Party you choose to merge with will be deleted.

4. Select **Merge**.
   The Merge Third Parties dialogue box displays.

5. From the Duplicate Third Party drop down menu, select the Third Party you want to merge with.
   Warning! The Third Party you select will be deleted after the information is merged with the current Third Party, as explained in the screen shot below.



6. Select **Yes** to save.
   The two Third Parties are now merged and appear under one name.

Deleting Third Parties

You can delete Third Parties if they do not have any Contacts/Addresses or invoices, proposals, or other events associated with them.

To delete a Third Party, perform the following steps:

1. Go to the Third Parties tab in the top navigation ribbon.

2. Under Third Party, select **List** from the left-hand menu.
   The list of Third Parties displays.

3. Select the Third Party you want to delete.

4. Select **Delete**.
   The Delete Third Parties dialogue box displays.

5. Select **Yes** to delete the Third Party.
   The Third Party has been deleted and is no longer accessible via the Third Parties tab.

Contacts/Addresses

The Contacts/Addresses feature allows you to store and manage alternate contact information for Third Parties. For example, you could create separate Contacts/Addresses for each of the sales representatives from a vendor company that is recorded in Third Parties. Each of the sales representatives' profiles would be linked to the Third Party entry.

Adding New Contacts/Addresses

Contacts/Addresses are usually individuals that represent a Third Party.

To add a new Contact/Address, perform the following steps:

1. Go to the Third Parties tab in the top navigation ribbon.

2. Under Contacts/Addresses, select **New Contact/Address** from the left-hand menu.
   The Create Contact/Address entry form displays.

3. Complete the required fields (indicated in bold):

   a. Enter the Contact/Address' last name.

   b. From the Third Party drop down menu, select which Third Party you want to link this Contact/Address to.

4. Select **Add** to save the new Contact/Address.
   The Third Party has been added and is accessible via the Third Parties tab.

Emailing Contacts/Addresses

You can email Third Parties directly from their profile in
Dolibarr.

To email a Third Party, perform the following steps:

1. Go to the Third Parties tab in the top navigation ribbon.

2. Under Contacts/Addresses, select **List** from the left-hand menu.
   The list of Contacts/Addresses displays.

3. Select the Contact/Address you want to email.

4. Select **Send Email**.
   The Send Email section expands.

5. Complete the required fields (indicated in bold):

   a. Select the Sender email address from the drop down menu.
      Note: This field automatically populates with the assigned sales representative's email address, but you can select a different email address from the drop down menu.

   b. Enter the Receiver email address(es).
      Note: This field automatically populates with the Contact/Address' email address, but you can add additional email addresses.

   c. Enter the email topic.
      Note: This field automatically populates with *Information*, but you can enter a custom topic.

6. Select **Send Email**.
   Your email is on its way to the Contact/Address.

Modifying Contacts/Addresses

You can modify Contact/Address information at any time.

To modify Contacts/Addresses, perform the following steps:

1. Go to the Third Parties tab in the top navigation ribbon.

2. Under Contacts/Addresses, select **List**.
   The list of Contacts/Addresses displays.

3. Select the Contact/Address you want to modify.

4. Select **Modify**.

5. Change existing information or enter new information.

6. Select **Save**.
   Your modifications now show in the Contact/Address' profile.

Deleting Contacts/Addresses

You can delete Contacts/Addresses if they do not have any invoices, proposals, or other events associated with them.

To delete a Contact/Address, perform the following steps:

1. Go to the Third Parties tab in the top navigation ribbon.

2. Under Contacts/Addresses, select **List** from the left-hand menu.
   The list of Contacts/Addresses displays.

3. Select the Contact/Address you want to delete.

4. Select **Delete**.
   The Delete Contact/Address dialogue box displays.

5. Select **Yes** to delete the Contact/Address.
   The Contact/Address has been deleted and is no longer accessible via the Third Parties tab.

Disabling Contacts/Addresses

If you no longer want a Contact/Address to be active, but do not want to delete them, you can disable them.

To disable a Contact/Address, perform the following steps:

1. Go to the Third Parties tab in the top navigation ribbon.

2. Under Contacts/Addresses, select **List** from the left-hand menu.
   The list of Contacts/Addresses displays.

3. Select the Contact/Address you want to disable.

4. Select **Disable**.
   The Disable Contact/Address dialogue box displays.

5. Select **Yes** to disable the Contact/Address.[1]
   The Contact/Address is still visible via the Third Parties tab, but is no longer active.

1. **Tip:** Follow these steps and select Reactivate to make the Contact/Address active again.

Chapter 2: Commercial Proposals Application

About Commercial Proposals

The Commercial Proposals application allows you to create highly customizable proposals for your Third Parties. Commercial Proposals include proposed terms of sale for a product or service, including price, payment terms, applicable taxes, discounts, and more.

You can generate Commercial Proposals on your company letterhead or a pre-loaded template. See *“Dolibarr Getting Started Guide* | *CRM”* for more information on how to enable and configure the Commercial Proposals application.

How to Use Commercial Proposals

The following section explains how to use the Commercial Proposals application, including creating new Commercial Proposals, emailing them directly to Third Parties from Dolibarr, and more.

Creating New Commercial Proposals

You can create a Commercial Proposal as a tool for negotiating the terms of a sale with a Third Party.

To create a new Commercial Proposal, perform the following steps:

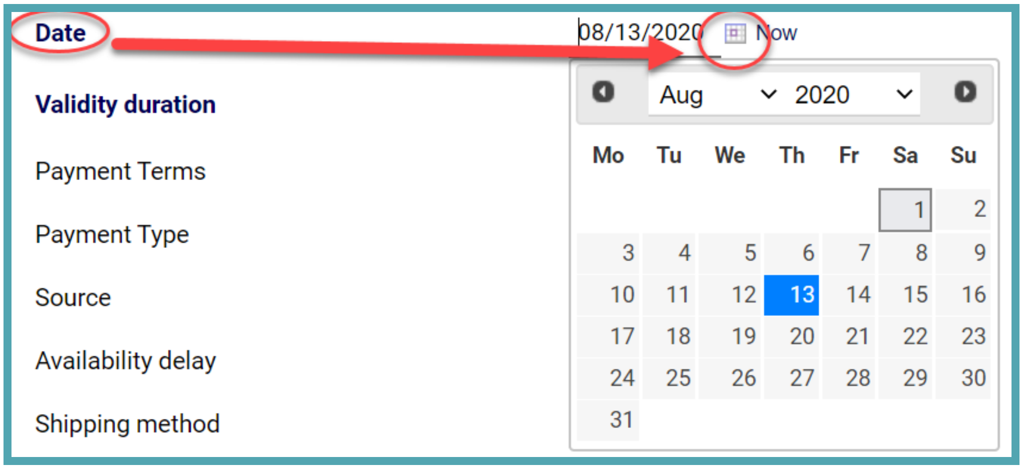
1. Go to the Commerce tab in the top navigation ribbon.

2. Under Commercial Proposals, select **New Proposal** from the left-hand menu.
   The New Commercial Proposal entry form displays.

3. Complete the required fields (indicated in bold):

   a. From the Customer drop down menu, select the Third Party you want to create a proposal for.

b. Select the calendar icon to specify the date, as shown in the screen shot below.
Note: This field automatically populates with the current date.



c. Enter the Validity duration.
Note: This field automatically populates with 15 days, but you can enter custom duration.

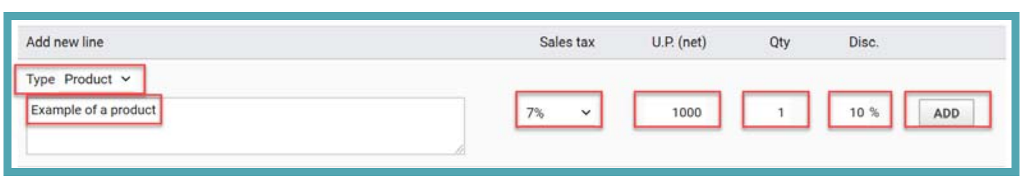
4. Complete the other optional fields, as desired.

5. Select **Create Draft**.
The Proposal card draft form displays.

6. Enter the product or service details:

a. Under Add New Line, select an option from the Type drop down menu (Product or Service).

b. Complete all other fields pertaining to the Type (sales tax, unit price, quantity, description, and discount).
Note: All of the fields in this section are required, as shown in the screen shot below.



c. Select **Add**.

7. Select **Validate**.
The Validate Commercial Proposal dialogue box displays.

8. Select **Yes** to save the Commercial Proposal.
The new Commercial Proposal has been created and accessible via the Commerce tab.

Emailing Commercial Proposals to Third Parties

You can email Commercial Proposals directly to Third Parties in Dolibarr.

To email a Commercial Proposal to a Third Party, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Commercial Proposals, select **List** from the left-hand menu.
   The List of Commercial Proposals displays.

3. Select the Commercial Proposal you want to email.

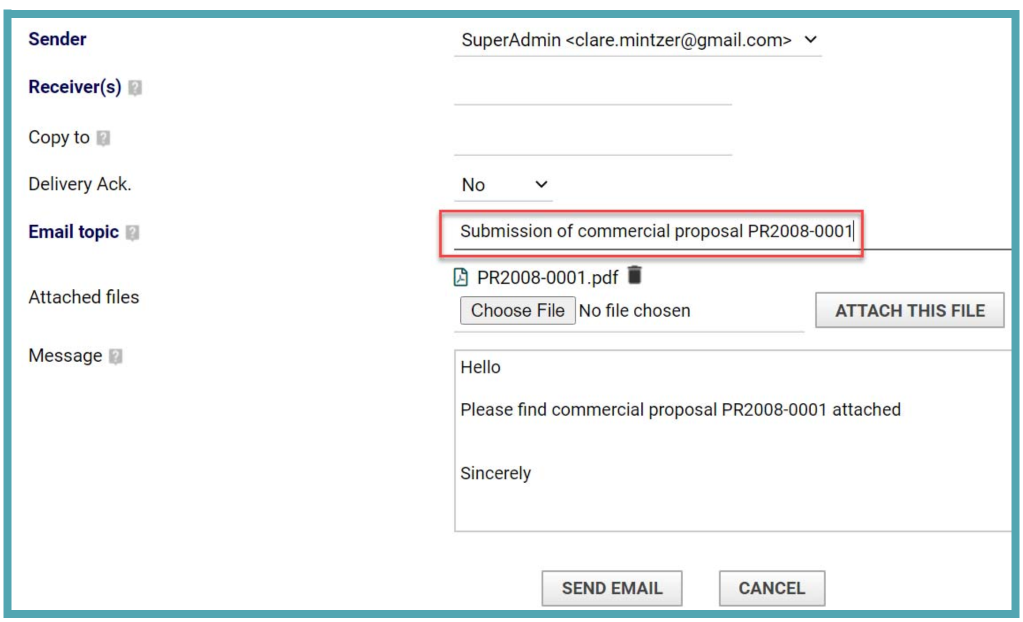
4. Select **Send Email**.
   The Send Email section expands.

5. Complete the required fields (indicated in bold):

   a. Select the Sender email address from the drop down menu.
      Note: This field automatically populates with the assigned sales representative's email address, but you can select a different email address from the drop down menu.

   b. Enter the Receiver email address(es), which can be either a Third Parties or a Contacts/Addresses.

   c. Enter the email topic.
      Note: This field automatically populates with *Submission of commercial proposal...* followed by the proposal ID, as shown in the screen shot below, but you can enter a custom topic.



6. Select **Send Email**.
   Your email with the attached Commercial Proposal is on its way to the Third Party.

Modifying Commercial Proposals

You can modify a Commercial Proposal, as long as it has not been set as accepted or refused.

To modify a Commercial Proposal, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Commercial Proposals, select **List** from the left-hand menu.
   The List of Commercial Proposals displays.

3. Select **Modify**.

4. Make any desired changes.

5. Select **Validate**.
   The Validate Commercial Proposals dialogue box displays.

6. Select **Yes** to save your modifications.
   Your modifications now show on the Commercial Proposal.

Cloning Commercial Proposals

You can clone a Commercial Proposal to create a new Commercial Proposal with a unique ID. You can alter the details or even change the Third Party. For example, you might want to send the same proposal to two different Third Parties, so you could create one and then clone it and change the Third Party information.

To clone a Commercial Proposal, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Commercial Proposals, select **List** from the left-hand menu.
   The List of Commercial Proposals displays.

3. Select the Commercial Proposal you want to clone.

4. Select **Clone**.
   The Clone dialogue box displays.

   a. If you want to change the Third Party, select a new Third Party from the drop down menu.

   b. Select **Yes** to save the status.
      A new Commercial Proposal with a unique ID displays.

5. Make any desired changes, such as adding a new product or a different discount.

6. Select **Validate**.
   The Validate Commercial Proposal dialogue box displays.

   a. Select **Yes** to save the cloned Commercial Proposal.
      The duplicate Commercial Proposal has been created and is now accessible via the Commerce tab.

Closing Commercial Proposals

Once a Third Party has agreed to or rejected a proposal, you must close it.

To close a Commercial Proposal, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Commercial Proposals, select **List** from the left-hand menu.
   The List of Commercial Proposals displays.

3. Select the Commercial Proposal you want to close.

4. Select **Set Accepted/Refused**.
   The Set Accepted/Refused dialogue box displays.

   a. Select an option from the Set Status To drop down menu (Signed or Not Signed).

   b. Select **Yes** to save the status.
      The Commercial Proposal is now closed and cannot be altered unless you re-open it. See *"Re-opening Commercial Proposals"* on page 13.[1]

Re-opening Commercial Proposals

You can re-open a Commercial Proposal after you have closed it.

To re-open a Commercial Proposal, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Commercial Proposals, select **List** from the left-hand menu.
   The List of Commercial Proposals displays.

3. Select the Commercial Proposal you want to re-open.

---

1. **Tip:** When a Third Party accepts a Commercial Proposal and you close it, you must bill it. *See "Dolibarr User Guide | Finance & Billing" for more information on how to enable and configure the Third Parties application.*

4. Select **Re-open**.
   The Re-open dialogue box displays.

5. Select **Yes** to re-open the Commercial Proposal.
   The Commercial Proposal is open and can be modified.

Deleting Commercial Proposals

You may decide to delete a Commercial Proposal, especially if you did not reach a resolution with the Third Party or chose not to send it.

To delete a Commercial Proposal, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Commercial Proposals, select **List** from the left-hand menu.
   The List of Commercial Proposals displays.

3. Select the Commercial Proposal you want to delete.

4. Select **Delete**.
   The Delete Commercial Proposal dialogue box displays.

5. Select **Yes** to delete the Commercial Proposal.

Chapter 3: Sales Orders Application

About Sales Orders

The Sales Orders application allows you to manage orders for products or services from Third Parties. Sales Orders reflect the confirmed terms of sale between you and a Third Party. Typically, a Sales order is preceded by a Commercial Proposal. See *"About Commercial Proposals"* on page 9.

You can generate Sales Orders on your company letterhead or a pre-loaded template. See *"Dol-ibarr Getting Started Guide | CRM"* for more information on how to enable and configure the Sales Orders application.

How to Use Sales Orders

The following section explains how to use the Sales Orders application, including creating new Sales Orders, emailing them directly to Third Parties from Dolibarr, and more.

Creating New Sales Orders

Sales Orders reflect the confirmed terms of sale.

To create a new Sales Order, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.
2. Under Sales Orders, select **New Order** from the left-hand menu.
   The Create Order entry form displays.
3. Complete the required fields (indicated in bold):
   a. From the Customer drop down menu, select the Third Party you want to create a Sales Orders for.

b. Select the calendar icon to specify the date.
Note: This field automatically populates with the current date.

4. Complete the other optional fields, as desired.

5. Select **Create Draft**.
The Order card draft form displays.

6. Under Add New Line, select an option from the Type drop down menu (Product or Service).

a. Complete all other fields pertaining to the Type (sales tax, unit price, quantity, description, and discount).
Note: All of the fields in this section are required.

b. Select **Add**.

7. Select **Validate**.
The Validate Sales Order dialogue box displays.

8. Select **Yes** to save the Sales Order.
The new Sales Order has been created and is accessible via the Commerce tab.

Creating Sales Orders from Commercial Proposals

If a Third Party agrees to a Commercial Proposal, you can use that Commercial Proposal to create a Sales Order, making the process faster. Make sure to set the Commercial Proposal to Accepted before using it to create a Sales Order. See *"Closing Commercial Proposals"* on page 13.

To create a Sales Order from a Commercial Proposal, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

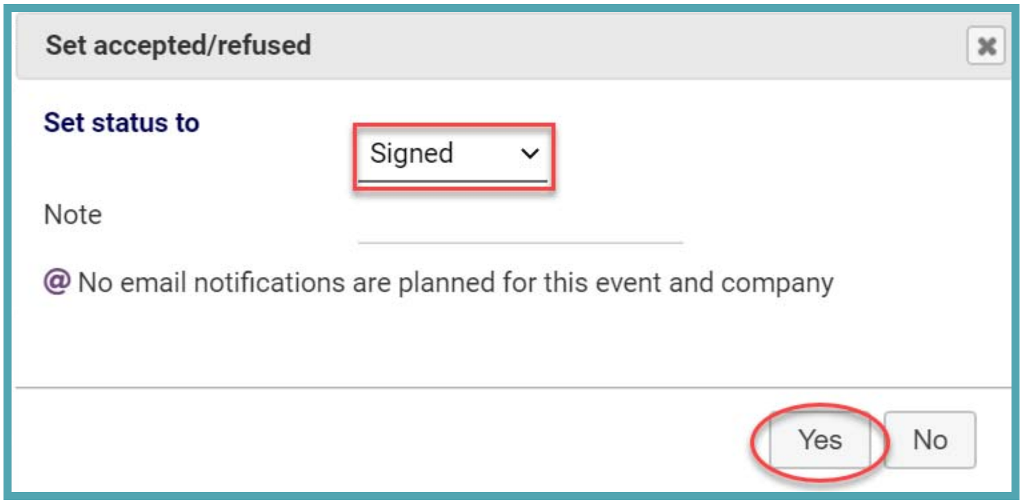
2. Under Commercial Proposals, select **List** from the left-hand menu.
The List of Commercial Proposals displays.

3. Select the Commercial Proposal you want to use as the basis for your Sales Order.

4. Select **Set Accepted/Refused**.
The Set Accepted/Refused dialogue box displays.

a. Select **Signed** from the Set Status To drop down menu.

b. Select **Yes** to save the status, as shown in the screen shot below.



5. Select **Create Order**.

6. Complete the required field (indicated in bold):

   a. Select the calendar icon to specify the date.
   Note: This field automatically populates with the current date.

7. Select **Create Draft**.

8. Select Validate.
   The Validate order dialogue box displays.

9. Select **Yes** to save the Sales Order.
   The Commercial Proposal is now a Sales Order and is accessible via the Commerce tab.

Emailing Sales Orders to Third Parties

You can email Sales Orders directly to Third Parties in Dolibarr.

To email a Sales Order to a Third Party, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Sales Orders, select **List** from the left-hand menu.
   The List of Sales Orders displays.

3. Select the Sales Order you want to email.

4. Select **Send Email**.
   The Send Email section expands.

5. Complete the required fields (indicated in bold):

   a. Select the Sender email address from the drop down menu.
   Note: This field automatically populates with the assigned sales representative's email address, but you can select a different email address from the drop down menu.

   b. Enter the Receiver email address(es).
   Note: you can select the main email address for the Third Party or that of a Contact/Address. *See "Contacts/Addresses" on page 5.*

   c. Enter the email topic.
   Note: This field automatically populates with *Submission of order...* followed by the order ID, but you can enter a custom topic.

6. Select **Send Email**.
   Your email with the attached Sales Order is on its way to the Third Party.

Modifying Sales Orders

You can modify a Sales Order at any time.

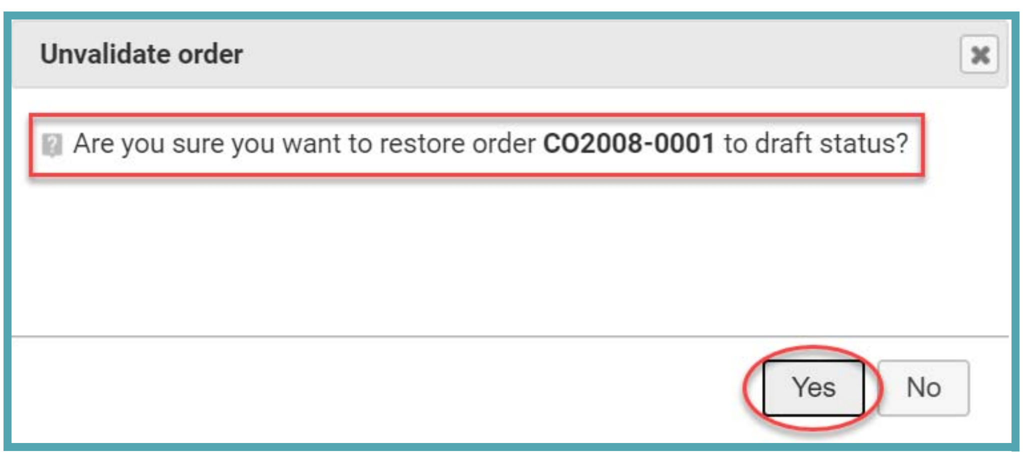
To modify a Commercial Proposal, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Sales Orders, select **List** from the left-hand menu.
   The List of Sales Orders displays.

3. Select **Modify**.
   The Unvalidate Order dialogue box displays.

   a. Select **Yes** so you can modify the Sales Order, as shown in the screen shot below.



4. Make any desired changes.

5. Select **Validate**.
   The Validate Commercial Proposals dialogue box displays.

6. Select **Yes** to save your modifications.
   Your modifications now show on the Sales Order.

Cloning Sales Orders

You can clone a Sales Order to create a new Sales Order with a unique ID. You can alter the details or even change the Third Party. For example, you might want to send the same order to two different Third Parties, so you could create one and then clone it and change the Third Party information.

To clone a Sales Order, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Sales Orders, select **List** from the left-hand menu.
   The List of Sales Order displays.

3. Select the Sales Order you want to clone.

4. Select **Clone**.
   The Clone dialogue box displays.

   a. Select a Third Party from the drop down menu.

   b. Select **Yes** to save the status.
      A new Sales Order with a unique ID displays.

5. Make any desired changes, such as adding a new product or a different discount.

6. Select **Validate**.
   The Validate order dialogue box displays.

   a. Select **Yes** to save the cloned Sales Order.
      The duplicate Sales Order has been created and is now accessible via the Commerce tab.

Closing Sales Orders

Once a Sales Order has been paid in full and/or shipped to the Third Party, you must close it.

To close a Sales Order, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Sales Orders, select **List** from the left-hand menu.
   The List of Sales Orders displays.

3. Select the Sales Order you want to close.

4. Select **Classify Delivered**.
The Close order dialogue box displays.

    a. Select **Yes** to close the Sales Order.
    The Sales Order is now closed and cannot be altered.

Classifying Sales Orders as Billed

Once you have sent the Third Party a bill for a Sales Order, you can classify it as billed.

To classify a Sales Order as billed, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Sales Orders, select **List** from the left-hand menu.
The List of Sales Orders displays.

3. Select the Sales Order you want to close.

4. Select **Classify Billed**.
The Sales Order is now classified as billed.[1]

Canceling Sales Orders

To cancel a Sales Order, perform the following steps:

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Sales Orders, select **List** from the left-hand menu.
The List of Sales Orders displays.

3. Select the Sales Order you want to delete.

4. Select **Cancel**.
The Cancel order dialogue box displays.

5. Select **Yes** to cancel the Sales Order.
The Sales Order is canceled and is no longer accessible via the Commerce tab.

Deleting Sales Orders

To delete a Sales Order, perform the following steps:

1. **Note:** To reverse this function, follow the same steps to classify the Sales Order as unbilled.

1. Go to the Commerce tab in the top navigation ribbon.

2. Under Sales Orders, select **List** from the left-hand menu.
   The List of Sales Orders displays.

3. Select the Sales Order you want to delete.

4. Select **Delete**.
   The Delete order dialogue box displays.

   a. Select **Yes** to delete the Sales Order.

Appendix A: Glossary

Table 1: Glossary of Terms

Term	Definition
Third Parties	Any individuals, businesses, or nonprofit organizations who are customers, prospects, or vendors for your business.
Customers	Third Parties who have purchased a product or service from you in the past.
Prospects	Third Parties who are considering purchasing a product or service from you.
Vendors	Third Parties who are suppliers for your business. Vendors can also be customers or prospects.
Prospect/Customer	Third Parties who have purchased a product or service from you in the past and are considering future purchases.
Not prospect, nor customer	A Third Party who is recorded in your system, but has not purchased any products or services from you and does not intent to. Not a vendor.
Contacts/Addresses	Alternate contacts or representatives of a Third Party. For example: You work with many different representatives from ABC Corp., a company that is recorded as a Third Party in your system. You could create Contacts/Addresses for each representative, which would be linked to the ABC Corp. profile and share much of the same information, such as the office address.
Validity duration	The amount of time a Commercial Proposal is valid for.

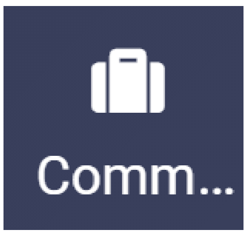
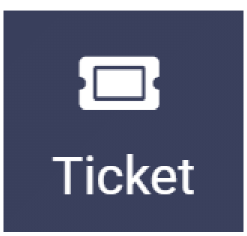
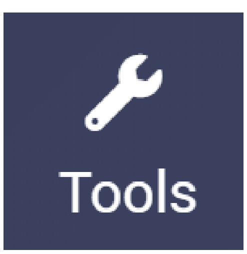
Table 1: Glossary of Terms

Term	Definition
Payment Terms	An agreement with a Third Party about when they will pay. For example: they may agree to pay upon delivery or within 30 days of receipt.
Payment Type	The method by which a Third Party has agreed to pay. For example: wire transfer, cash, or cheque.
Source/Channel	The channel through which a Third Party heard about your product or service, resulting in a Commercial Proposal or Sales Order. For example: social media or email marketing campaign.
Availability Delay	How long it will be until an unavailable product or service is available again.
Ref. Customer	A note you can manually add to a Commercial Proposal or Sales Order as a reference for a Third Party. For example: *for site maintenance Aug 30*
Linked files	Other files that are links to a Commercial Proposal or Sales Order, such as another Sales Order for the same product or service.

Table 2: Glossary of icons

Icon	Definition
	The Home tab. Select this view to see your main dashboard.
	The Third Parties tab. Select this icon to view or work with Third Parties and Contacts/Addresses.

Table 2: (Continued)Glossary of icons

Icon	Definition
	The Services tab. Select this icon to view or create shipments.
	The Commerce tab. Select this icon to view or work with Commercial Proposals, Sales Orders, Contracts/Subscriptions, and Interventions.
	The Agenda tab. Select this icon to view your calendar and work with events.
	The Ticket tab. Select this icon to view or work with Tickets.
	The Tools tab. Select this icon to access your tools, such as email templates.

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