

SEND PROFORMA AND INVOICES EMAIL FROM ODOO

STEP 1 (optional):

* Go to partner form to check partner/client email addresses

* Email will be sent on partner's primary email or secondary email or both

The screenshot displays the Routesms ODOO interface for a partner form titled 'Sales Orders / PI1347 / Media Network'. The interface includes a top navigation bar with tabs for Messaging, Sales, Accounting, Warehouse, Human Resources, and Reporting. A left sidebar lists various sales-related functions. The main content area shows partner details for 'R121317'.

Partner Details:

- Address:** Lebanon - Dora - Highway - Center Kharat - 7th Floor
- Phone:** (empty)
- Mobile:** (empty)
- Fax:** (empty)
- Email:** (empty) - *primary email*
- Title:** (empty)
- Alias:** (empty)
- Website:** Lebanon
- Routesms Customer Id:** RI5688
- Routesms Remark:** test
- Domain:** medianetworklb.com

Additional Contact Information:

Below the partner details, there is a section for 'Additional Contact Information' with a checkbox for 'Do Not Send Email To Primary Address' (unchecked). Below this is a table for adding secondary email addresses:

Domain	Email	Send Email

secondary email

The bottom of the interface shows a status bar with the URL '182.72.52.19:8069/web#notebook_page_189', a 'Send a message' button, a 'Log an internal note' button, and a 'Follow' button.

STEP 2(proforma):

* Go to sale-> quotation or proforma -> open record-> click “send by email” button

The screenshot shows the 'Sales Orders / PI1347' page in the routesms application. The left sidebar contains a navigation menu with categories like Sales, After-Sale Services, Phone Calls, Products, and Configuration. The main content area displays the 'Proforma Invoice PI1347' details. At the top, there are buttons for 'Edit', 'Create', 'Send by Email' (highlighted with a red box and an arrow pointing to it with the text 'click to send email to client'), and 'Cancel Order'. Below these are buttons for 'Print', 'Attachment(s)', and 'More'. A progress bar at the top right shows the workflow: Draft Quotation, Quotation Sent, Sales Order, Sale to Invoice (current step), and Done. The invoice details include Customer (Media Network), Invoice Address (Media Network), Date (01/15/2016 14:25:58), Reference/Description, Warehouse (Warehouse RSUK), and Pricelist (Public Pricelist RSUK (USD (RSUK))). The 'Order Lines' tab is active, showing a table with one line item: Enterprise Messaging (Bulk SMS) with a quantity of 1.000, unit price of 3000.00000, and subtotal of 3000.0000. The bottom right of the invoice summary shows 'Untaxed Amount : \$ 3000.0000', 'Taxes : \$ 0.0000', and 'Total : \$ 3000.0000'. At the bottom of the page, there are buttons for 'Send a message' or 'Log an internal note' and a 'Following' button.

routesms
A Messaging & Voice API Company

Sales Orders / PI1347

Edit Create **Send by Email** Cancel Order Print Attachment(s) More

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Draft Quotation Quotation Sent Sales Order **Sale to Invoice** Done

Proforma Invoice PI1347

Customer: Media Network
Invoice Address: Media Network
Date: 01/15/2016 14:25:58
Reference/Description:
Warehouse: Warehouse RSUK
Pricelist: Public Pricelist RSUK (USD (RSUK))

Order Lines Other Information

Product	Description	Quantity	Unit Price	Taxes	Subtotal
Enterprise Messaging (Bulk SMS)	Enterprise Messaging (Bulk SMS)	1.000	3000.00000		3000.0000

Untaxed Amount : \$ 3000.0000
Taxes : \$ 0.0000
Total : \$ 3000.0000

Send a message or Log an internal note Following

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STEP 3:

- * Click “send” button to send proforma email to partner/client
- * BCC / carbon copy of email with attachment will be send automatically on salesperson's email address.
- * Email address of partner and salesperson will be picked from backend automatically
- * Proforma attachment will be picked automatically from backend

The screenshot displays the ROUTESMS web application interface. A modal window for composing an email is open, titled "Subject: ROUTESMS SOLUTIONS (UK) LIMITED Order (Ref PI1347)". The "Recipients" field is highlighted with a red box, and a tooltip indicates "email details hidden". The email body contains the following text:

Hello Media Network,
Here is your order confirmation from ROUTESMS SOLUTIONS (UK) LIMITED:

REFERENCES
Order number: PI1347
Order total: 3000.0 USD (RSUK)
Order date: 01/15/2016 14:25:58 (Asia/Calcutta)
Your contact: [Lester Dsouza](#)

You can access this document and pay online via our Customer Portal:

[View Order](#)

If you have any question, do not hesitate to contact us.

At the bottom of the modal, the "Send" button is highlighted with a red box, and a tooltip indicates "click to send email (attachement picked from system backend)".

The background shows the main application menu on the left, including sections like Sales, Customers, Leads, Opportunities, Quotations, Proforma, Customer Search, Swap Partner, After-Sale Services, Helpdesk and Support, Phone Calls, Logged Calls, Products, Configuration, and Pricelists. The top navigation bar includes Messaging, Sales, Accounting, Warehouse, Human Resources, and Reporting. The bottom status bar shows "Powered by Odoo" and options to "Send a message" or "Log an internal note".

STEP 4(sales invoice) :

* Go to accounting-> customer invoice -> open record-> click “send by email” button

The screenshot shows the Odoo Accounting interface for a customer invoice. The top navigation bar includes 'Messaging', 'Sales', 'Accounting' (selected), 'Warehouse', 'Human Resources', and 'Reporting'. The user is 'Lester Dsouza (ROUT...)'. The left sidebar shows 'Customers' and 'Suppliers' sections. The main content area displays the invoice for 'SAJ/2016/4046'. A red box highlights the 'Send by Email' button, with a red arrow pointing to it and the text 'click to send email to client'.

Customer In... / SAJ/2016/4046

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Send by Email Refund Invoice Draft Open Paid

Invoice SAJ/2016/4046

Customer Kingdom africa media ltd **Invoice Date** 01/07/2016
Country Nigeria **Currency** EUR (RSUK)
Account Type
Contact Person
Fiscal Position

Invoice Lines Other Info Payments

Product	Description	Quantity	Unit Price	Taxes	Tax Amount	Amount
Enterprise Messaging (Bulk SMS)	Enterprise Messaging (Bulk SMS)	1.000	9.13000		0.00000	9.1300

Subtotal : 9.1300 €
Tax : 0.0000 €
Total : 9.1300 €

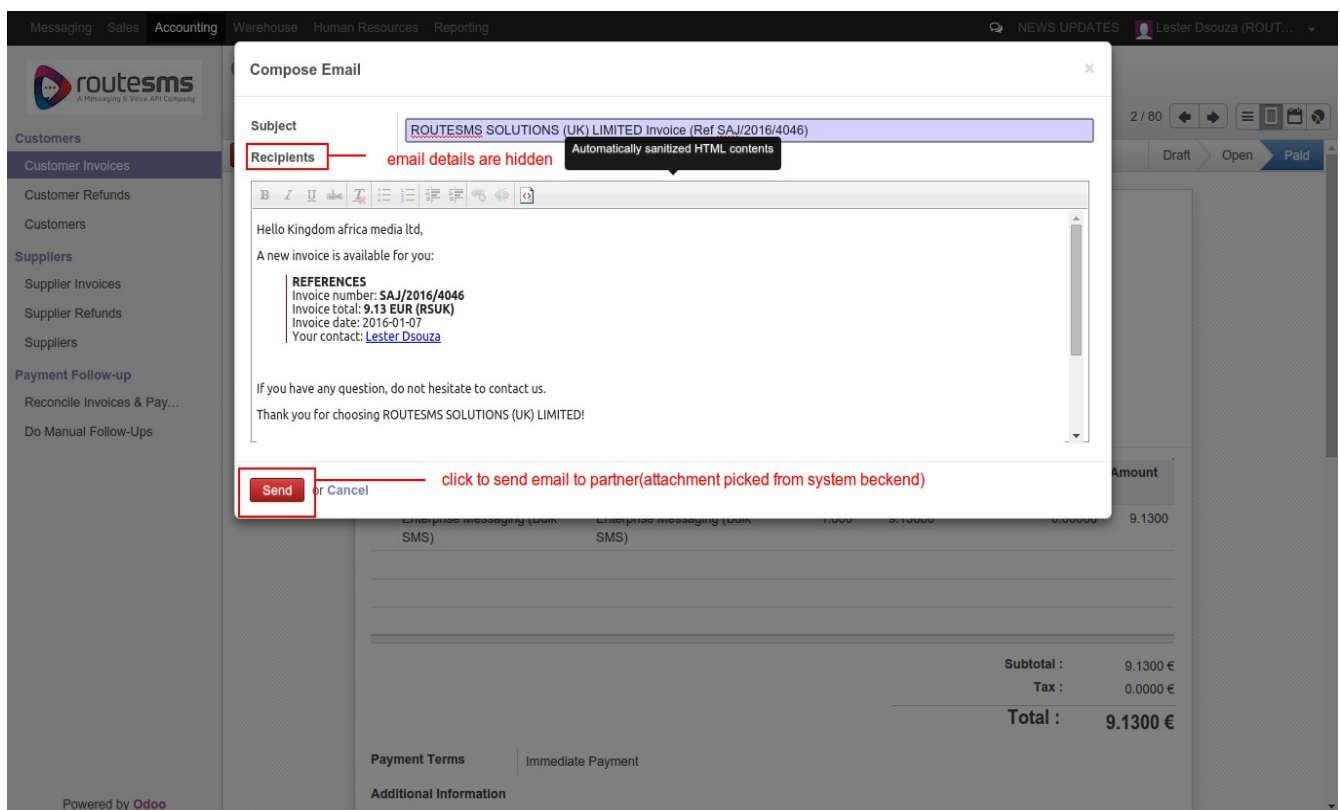
Payment Terms Immediate Payment

Additional Information

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STEP 5:

- * Click “send” button to send customer invoice email to partner/client
- * BCC / carbon copy of email with attachment will be send automatically on salesperson's(routesms) email address and accountant's(routesms) email address .
- * Email address of partner ,salesperson(routesms) and accountant(routesms) will be picked from backend automatically
- * Sale invoice attachment will be picked automatically from backend



THANK YOU

For any query kindly contact:

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