

# Product Updates: R16.3, June 2016

## Here is what is new in Briox

### Document Statuses in the CRM

Work in a single place! Get a total overview of the statuses your Customer Invoices, Quotes and Orders directly from the CRM.

#### ▼ Business Activities (All)

Type	Serial No.	Date	Amount	Due Date
Invoice	151	25-01-2016	3,735.00	GBP 10-03-2016
Invoice	150	19-01-2016	12,434.00	GBP 19-01-2016
Invoice	91	13-10-2015	270.00	GBP 13-10-2015
<input type="checkbox"/> Credit Note	94	13-10-2015	-270.00	GBP 13-10-2015
Invoice	92	13-10-2015	48.00	GBP 13-10-2015
<input type="checkbox"/> Invoice	93	13-10-2015	270.00	GBP 13-10-2015
Invoice	72	02-07-2015	1,230.00	GBP 02-07-2015
<input type="checkbox"/> Invoice	1	15-10-2014	108.00	GBP 25-10-2014

The same colour code that is used under Sales is now displayed under Business Activities to give you, at a glance, a more comprehensive overview of how your business with your customer is doing.

Simply mouse over to get an explanation of the colour code.

*Where: CRM – Companies*

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## Default payment terms

No need to enter a Payment term on each and every customer! It is now possible to select a default payment term for all your customer. Go in & select your new default payment term with the radio button that has been added to the view.

### ▼ Payment Terms

Number of days		Description		Default	
10		10 days		<input type="radio"/>	
14		14 days		<input type="radio"/>	
28		28 days		<input type="radio"/>	
30		30 days		<input checked="" type="radio"/>	
45		45 days		<input type="radio"/>	
60		60 days		<input type="radio"/>	
90		90 days		<input type="radio"/>	
K		Cash		<input type="radio"/>	

Where: **Settings - Sales - Payments - Payment Terms**

## Client Signup

When adding a consultant to a client account. The consultant's personal settings (from the main account) will automatically be copied over to the client account.

Where: **Client Manager - Companies - Create Client Account**

## Some other small things:

- Have a look at our re-styled Help texts!
- Forget the search button & simply press enter for the search to start
- More...