❑ 15 : INVOICING

1. MAIN MENU #1

2. FOR NEW INVOICE - PUT IN CUSTOMER NUMBER OR NAME AND PRESS ENTER

3. PUT IN COUNTERMAN CODE AND PRESS ENTER

4. PUT IN QTY AND PART NUMBER FOR EACH ITEM TO SELL AND PRESS ENTER

5. TO PRINT PRESS F1 AND FOLLOW GUIDE AT BOTTOM
   (F1 FOR CHARGE, F3 FOR CASH, F4 FOR CHECK,OR F5 FOR CARD)

6. IF TENDER LOG IS ACTIVATED IT WILL ASK YOU FOR THE INFORMATION TO INPUT AND PRESS ENTER

7. INSIDE THE INVOICE SCREEN THERE MANY OPTIONS THAT ARE LISTED AT THE BOTTOM OF SCREEN :
   a. F1 TO PRINT INVOICE.
   b. F2 ALLOWS YOU TO ADD OR CHANGE INFORMATION RELATED TO THE INVOICE.
   c. F3 ALLOWS YOU TO DELETE SINGLE LINE ITEMS.
   d. F4 TO ENTER CATALOG.
   e. F5 TO ENTER STOCK CHECK SCREEN.
   f. F6 (NOT USED).
   g. F7 ALLOWS YOU TO CHANGE THE CUSTOMER NUMBER FOR ALL THE PARTS ON THE INVOICE. WILL ALSO NOTIFY YOU IF THERE IS A PRICE CHANGE.
   h. F8 SHOWS YOUR PURCHASING HISTORY FOR THE PART NUMBER YOUR CURSOR IS ON.
   i. F9 SHOWS THE CUSTOMERS PAST BUYING HISTORY ON THE PART NUMBER THE CURSOR IS ON.
   j. F10 ALLOWS YOU TO PUT THE INVOICE TO HOLD AND PRINT AS QUOTE OR PICKLIST.
   k. N = NO CORE CHARGED
   l. C = CORE RETURN
   m. K = CORE SELL. ALLOWS YOU TO REVERSE A CORE CHARGE FROM PRIOR INVOICE.
   n. R = NEW RETURN.
   o. D = DEFECTIVE RETURN.
   p. X = DEFECTIVE EXCHANGE.

NOTES

q. P = PICKUP OR BUYOUT. DOES NOT AFFECT THE QUANTITY ON HAND IN THE PART FILE.
r. S & L (NOT USED).

8. TO ACCESS CATALOG, YOU WILL PRESS F4 FROM THE INVOICE WORKSPACE - CHOOSE CATEGORY AND PARTS GROUP AND USE VEHICLE INFORMATION TO SEARCH YOUR PARTS. THE PARTS FOUND WILL BE LISTED BY THE LINE THEYARE ON. USE THE LINE ITEM NUMBER AND PRESS THE RIGHT ARROW. INPUT QUANTITY, PRESS RIGHT ARROW 2 TIMES TO CODES, PRESS F12 TO POST THE PART. CONTINUE UNTIL ALL PARTS NEEDED ARE CHOSEN AND POSTED. TO EXIT CATALOG PRESS ESC 2 TIMES. THE PARTS POSTED WILL AUTOMATICALLY COME BACK TO THE INVOICE WORKSPACE WHEN YOU EXIT CATALOGING ALONG WITH THE VEHICLE INFORMATION.

9. TO PUT AN INVOICE ON HOLD, PRESS F10 AFTER PUTTING THE PARTS ON THE SCREEN. IT WILL THEN SHOW YOU THE HOLD NUMBER

10. YOU CAN PRESS F1 TO PRINT AND HOLD OR F2 TO HOLD

11. TO RETRIEVE A HOLD INVOICE, PRESS F1 ON FRONT SCREEN OF INVOICING AND CUSTOMER NUMBER BOX WILL BE DISPLAYED.

12. PRESS F6 AND THIS WILL LIST ALL HOLDS CREATED FROM NEWEST TO THE OLDEST WITH ALL THE INFORMATION.

13. ARROW DOWN TO HIGHLIGHT THE HOLD YOU WANT. PRESS F3 TO MOVE HOLD BACK TO AN INVOICE. COUNTERMAN CODE BOX WILL BE DISPLAYED. INPUT THE COUNTERMAN ID THAT IS RETREIVING THE HOLD TICKET AND PRESS ENTER. (EXAMPLE – CODE 1 PUT WORKSPACE ON HOLD AND IS NOT HERE TODAY. CHANGE CODE TO THE PERSON RETRIEVING HOLD TICKET).

14. ON FRONT SCREEN OF INVOICING YOU HAVE OPTIONS F1 THRU F10. MANY ARE SHORTCUTS THRU MAIN MENU. TAKE TIME TO LEARN THESE FEATURES.
    a. F1 - IS TO RETRIEVE A HOLD TICKET AS EXPLAINED ABOVE.

    b. F2 - EXIT TO MAIN MENU.

NOTES

c. F3 - STOCK CHECK ALLOWS YOU TO CHECK QUANTITY ON HAND WITHOUT HAVING TO CREATE AN INVOICE. PRESS F3, INPUT CUSTOMER NAME AND PRESS ENTER. INPUT PART NUMBER AND PRESS ENTER. YOU CAN VIEW INVENTORY INFORMATION ON THAT PART. FROM HERE YOU CAN PRESS F1 TO VIEW CORES, PRESS F3 TO GO INTO PART FILE, PRESS F4 TO GO INTO CATALOG

d. F4 - INVOICE RECALL ALLOWS YOU TO REVIEW INVOICES BY MANY OPTIONS. INVOICE RECALL SELECTION BOX WILL BE DISPLAYED. INPUT CUSTOMER NUMBER AND PRESS ENTER. INPUT PRODUCT LINE AND PRESS ENTER. INPUT PART NUMBER AND PRESS ENTER. THIS WILL DISPLAY ALL INVOICES THAT HAVE BEEN PURCHASED FOR THIS CUSTOMER AND THIS PART. OR YOU CAN PRESS F1, INPUT THE INVOICE YOU WANT TO VIEW AND PRESS ENTER. ALSO YOU CAN PRESS F3 TO SEARCH BY MOST RECENT FIRST.

e. F5 - SHOW GOAL ALLOWS YOU TO GET A QUICK LOOK AT DAILY SALES AND SEE HOW CLOSE YOU ARE TO YOUR GOAL.

f. F6 - SHORTCUT INTO CUSTOMER FILE.

g. F7 - ALLOWS YOU TO REVIEW ALL HOLD INVOICES FROM MOST RECENT TO OLDEST.

h. F8 - ALLOWS YOU TO CANCEL ANY INVOICE. MUST BE CANCELLED BEFORE NEXT DAYEND IS RAN.

i. F9 - ALLOWS YOU TO SEE ALL HISTORY OF A PART. INPUT PRODUCT LINE AND PRESS ENTER. INPUT PART NUMBER AND PRESS F1 TO EXECUTE. PART NUMBER HISTORY SCREEN WILL BE DISPLAYED SHOWING INVOICE NUMBERS, PO's, CUSTOMER NUMBERS AND THE AMOUNT OF THE TRANSACTION.

j. F10 - INVOICE OPTIONS MENU HAS DIFFERENT THINGS. INCLUDES SHORTCUTS TO OTHER MENU OPTIONS. THE MOST IMPORTANT OPTION IS # 8 – CHANGE AN INVOICE.
MUST BE ACTIVATED IN SUPERVISORY TO WORK.

NOTES