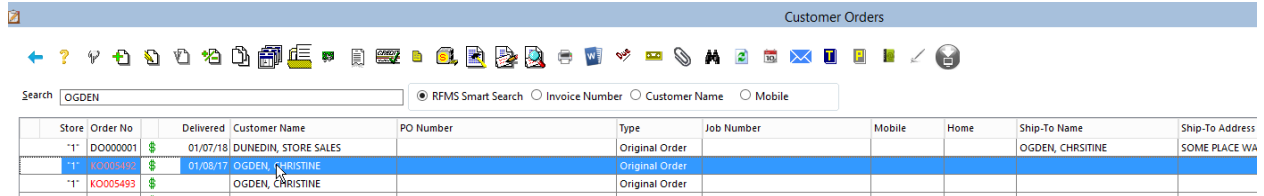



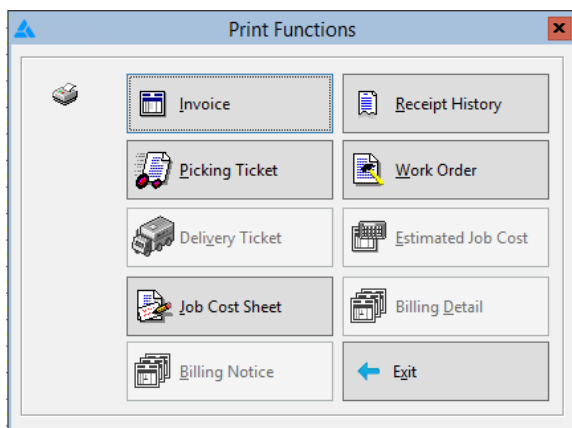
How To: Customer Orders Printing Documents

Go to Order Entry > File > Customer Orders. Search for the customer order and highlight the record.



Store	Order No	Delivered	Customer Name	PO Number	Type	Job Number	Mobile	Home	Ship-To Name	Ship-To Address
*1	DO000001	01/07/18	DUNEDIN STORE SALES		Original Order				OGDEN, CHRISTINE	SOME PLACE WA
*1	KO000110	01/08/17	OGDEN, CHRISTINE		Original Order					
*1	KO005493		OGDEN, CHRISTINE		Original Order					

Click the Printer Icon  to be returned with the Print Functions screen

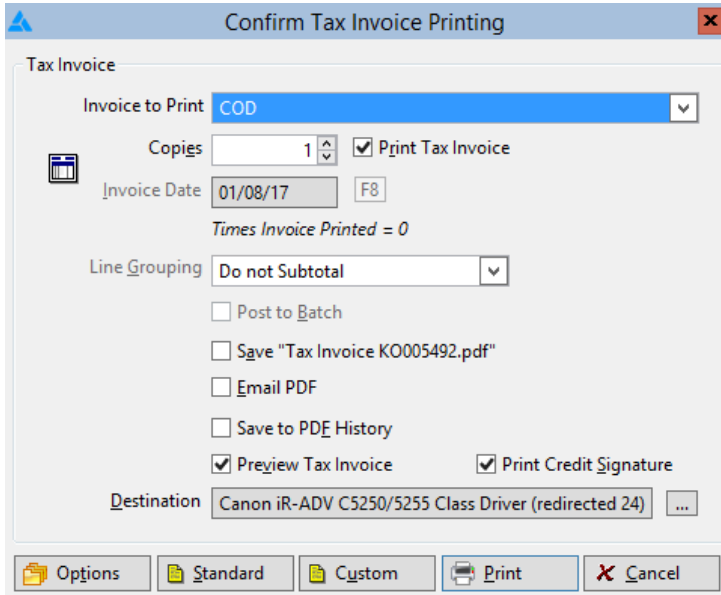


Documents that may be printed include:


- Invoice
- Acknowledgement
- Receipt History – a printout of all payments previously posted to the order
- Picking Ticket – a report of line items to be stage or pulled for delivery
- Work Order – first create the work order by clicking on the work order button found at the top of the customer order browse screen
- Deliver Ticket – only prints delivered lines
- Estimated Job Cost – prints even if all the order lines have not been assigned
- Job Cost Sheet – print this document if the customer order has been job costed
- Billing Detail – the billing detail document prints a detailed report of all billing notices
- Billing Notice – if the customer order is part of a billing group


How To: Customer Orders Printing Documents


Invoice

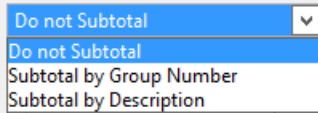


The screenshot shows the 'Confirm Tax Invoice Printing' dialog box. It includes fields for 'Invoice to Print' (set to 'COD'), 'Copies' (set to 1), 'Invoice Date' (01/08/17), and 'Line Grouping' (Do not Subtotal). There are several checkboxes: 'Print Tax Invoice' (checked), 'Post to Batch', 'Save "Tax Invoice KO005492.pdf"', 'Email PDF', 'Save to PDF History', 'Preview Tax Invoice' (checked), and 'Print Credit Signature' (checked). The 'Destination' is set to 'Canon iR-ADV C5250/5255 Class Driver (redirected 24)'. At the bottom, there are buttons for 'Options', 'Standard', 'Custom', 'Print', and 'Cancel'.

Invoice to Print - Click  for a dropdown list of invoice templates to choose from

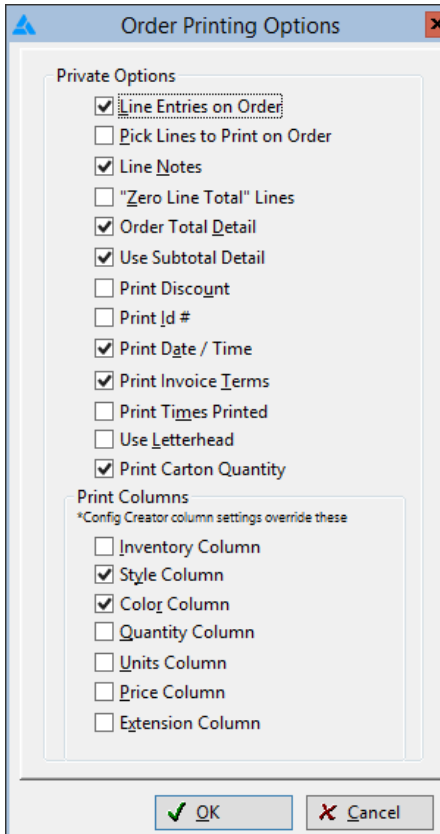
Copies – use the  to increase/decrease number of copies or, type in the field the required number. If you don't want an invoice to print, uncheck the radio button to Print Tax Invoice.

Line Grouping – Click  to show the dropdown box.



The screenshot shows the 'Line Grouping' dropdown menu with the following options: 'Do not Subtotal' (selected), 'Subtotal by Group Number', and 'Subtotal by Description'.

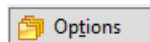
Post to Batch - If this box is checked then, the Job Cost Sheet will print during *Batch* Printing



The screenshot shows the 'Order Printing Options' dialog box. It has a 'Private Options' section with checkboxes for 'Line Entries on Order' (checked), 'Pick Lines to Print on Order', 'Line Notes' (checked), '"Zero Line Total" Lines', 'Order Total Detail' (checked), 'Use Subtotal Detail', 'Print Discount', 'Print Id #', 'Print Date / Time' (checked), 'Print Invoice Terms' (checked), 'Print Times Printed', 'Use Letterhead', and 'Print Carton Quantity'. There is also a 'Print Columns' section with checkboxes for 'Inventory Column', 'Style Column' (checked), 'Color Column' (checked), 'Quantity Column', 'Units Column', 'Price Column', and 'Extension Column'. At the bottom, there are 'OK' and 'Cancel' buttons.

Unit to Print.

- Save Tax Invoice
- Email PDF
- Save to PDF History
- Preview Tax Invoice
- Print Credit Signature

 Options

Click Options to confirm the Order Printing Options.

Line Entries on Invoice

Selecting this option will print each customer order line as they are entered from the order. If the line detail is not desired a description of the sale to print is, use the Custom Message feature.

How To: Customer Orders Printing Documents

Pick Lines to Print on Invoice

This selection allows you to pick and choose those lines on the order to have printed on the invoice. A pick list will appear, displaying all lines on the order. Invoices are designed to be printed on a pre-printed invoice form or on standard computer paper.

Line Notes

This selection allows line notes entered on a customer order to print on the customer invoice or acknowledgment. This option should be set on each workstation where the feature is needed.

'Zero Line Total' Lines

Selecting this option will print lines entered on the customer order that have a ZERO entered for the selling price.

Order Total Detail

Selecting this option will print detail information on the invoice for Material, Inst. Serv., Misc. Charge, Sales Tax, Misc. Tax, and Invoice Total. Additionally, the Payment Total and Balance will be shown. If this option is not selected, only the Invoice Total, Payment Total, and Balance will print.

Print Invoice Total Detail

Selecting this option will print detail information on the invoice for Material, Inst. Serv., Misc. Charge, Sales Tax, Misc. Tax, and Invoice Total. Additionally, the Payment Total and Balance will be shown. If this option is not selected, only the Invoice Total, Payment Total, and Balance will print.

To be able to subtotal you need to have Order Total Detail checked

Use Subtotal Detail

Selecting this option will print Material, Service, and Misc. Charges all combined in one Subtotal line in the Total Detail Area.

(In order to select this option Order Total Detail will need to be selected)

Print Discount

Check this box to print the discounts applied on the Post Payment screen. This does not print any discounts entered on individual lines.

Print ID #

This is a user definable field that is entered onto an Item Products record in the Products module. This field name may be set to display whatever the user chooses. Go into Utilities-Parameters-Parameters Public-Prompts, and notice there is a field that displays Serial Number Prompt. This field name will display on all Item Product Records through the RFMS system, as well as on the Print Invoices, Quotes and Claims options screen. This field name may be changed at any time. Note that this setting automatically defaults this field name to 'ID #'.

Print Date/Time

This option was added in version 10.5.6, before that it was automatically printed.

Print Times Printed

How To: Customer Orders Printing Documents

This option was added in version 10.5.6. Each time the document is printed, the number is incremented. If checked, the times printed will show on the lower right-hand corner. (Not applicable for Quotes)

Print Invoice Terms

Selecting this option causes the terms that are entered on the job cost screen to print on the invoice. Terms only print on invoices - not acknowledgements; the order must be job costed with terms entered. If the order is job costed without entering terms in the Terms field, obviously there would be nothing to print even though this option is checked.

Print Carton Quantity

The carton quantity based on sell in quantity is now an option for printing on Invoices/Acknowledgements and Delivery tickets.


Print Columns

These parameters allow the option to include more detail on invoice/acknowledgements.


Select one, all or any of the following options:

- Inventory Column
- Style Column
- Color Column
- Quantity Column
- Units Column
- Price Column
- Extension Column

How To: Customer Orders Printing Documents

 Custom

Click Custom to view any existing custom notes or create a custom note to print on the document.

 Print

Billing Notice

405/407 FRANCIS STREET
BROOKLYN, VIC 3012
Telephone: 03 9687 6688

K0005528

Billing Notice 1

Sold To		Ship To	
CHRISTINE OGDEN TEST CUSTOMER DUNEDIN		TEST CONSIGNMENT STOCK	

Original Contract Number	Telephone	Original PO Number	Contract Date
K0005528			12/12/18

Billing	Reference	Date	Purchase Order Number	Contract	Billed
1	K0005528	30/09/18		\$6,680.85	\$6,680.85

<table style="width: 100%;"> <tr> <td>Previously Billed:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Current Billed:</td> <td style="text-align: right;">6,680.85</td> </tr> <tr> <td>Total Billed:</td> <td style="text-align: right;">\$6,680.85</td> </tr> </table>	Previously Billed:	0.00	Current Billed:	6,680.85	Total Billed:	\$6,680.85	<table style="width: 100%;"> <tr> <td style="text-align: right;">\$6,680.85</td> <td style="text-align: right;">\$6,680.85</td> </tr> <tr> <td>Retainage (0.00%):</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Total Finance Charges:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Less Discounts:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Payments Received:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Current Due:</td> <td style="text-align: right;">\$6,680.85</td> </tr> </table>	\$6,680.85	\$6,680.85	Retainage (0.00%):	0.00	Total Finance Charges:	0.00	Less Discounts:	0.00	Payments Received:	0.00	Current Due:	\$6,680.85
Previously Billed:	0.00																		
Current Billed:	6,680.85																		
Total Billed:	\$6,680.85																		
\$6,680.85	\$6,680.85																		
Retainage (0.00%):	0.00																		
Total Finance Charges:	0.00																		
Less Discounts:	0.00																		
Payments Received:	0.00																		
Current Due:	\$6,680.85																		

Billing Detail

Page 1
12/12/18
8:11PM

BILLING NOTICE REPORT FOR BILLING GROUP:
BILLING GROUP FOR INVOICE K0005528

Billing Number	Billing Date	Billing Amount	Retainage Amount	GP %	Payments	Balance Due without Retainage
1	30/09/18	6,680.85		58.16%	0.00	6,680.85
Totals:		\$6,680.85		58.16%	\$0.00	\$6,680.85

Amount to be Billed: \$0.00 0.00%