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## **THE POINT OF SALE INVOICING MODULE<sup>®</sup>**

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The Point of Sale Invoicing module is designed for over the counter sales. This method of invoicing is designed to speed up the entry of over the counter sales by allowing you to perform the following tasks from a single input screen:

- Create a job
- Set up an invoice
- Post material from inventory
- Enter a bank deposit
- Apply a payment to an invoice

In addition, this routine allows you to create quotes, backorders and apply customer-pricing levels.

### **CREATING A JOB**

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Point of Sale allows you to create invoices against:

**A new job** – Create a new job if you are selling something over the counter with the possibility of selling additional items to the same customer, and you would like to get total cost/sales and profitability information through the job reporting function. If you choose to create the invoice against a new job, the system automatically sets up a job for the specified department as it stores the invoice.

**An existing job** – Post to an existing job if parts are being picked up at your showroom to be added to an existing job.

**Independent of a job** – Use the “No job” function for sales of items like filters sold over the counter that need to come out of inventory, but you don’t necessarily need to track service history on.

### **INVOICING**

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Invoices can be created as regular invoices, credits, memos, quotes or backorders. Invoices and credits save invoiced amounts, payments and any costing amounts to the customer’s receivable account, your G/L and to the job where applicable.

Memo’s show as a potential receivable through the Accounts Receivable Memo report; however do not hit the customer’s receivable account or your G/L until converted to invoices. Inventory line items on memos are not reflected in your quantity on hand for those parts; however, quantities on outstanding memos are reflected in the “Promised” amount in the lower left corner of the screen.

Quotes are not reflected on the customer aging, memo report or your G/L. In addition, inventory items on quotes are not reflected in either the promised or on hand figures until the quote is converted to a memo or invoice.

Backorders are created by the system if you have line items on an invoice where the quantity ordered is greater than the quantity received by your customer. Various reports are available to track backorders.

### **MATERIAL POSTING**

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In order to post parts out of inventory to a Point of Sale invoice, the “Costing” option must be checked. This is the default option on this screen. As you save a Point of Sale invoice, quantity on hand is reduced, items are expensed and the appropriate cost is allocated to the job (where applicable)

### **APPLYING A PAYMENT**

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Full or partial payment amounts can be entered directly on the Point of Sale invoicing screen, and the balance due on the invoice is adjusted accordingly.

### **CUSTOMER PRICING LEVELS**

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Pricing levels allow you to set a discount or additional mark up percentage on a customer-by-customer basis. Each customer’s pricing level defaults on the Point of Sale Invoicing screen and line items receive the corresponding discount or markup. The default pricing level may be overridden for any invoice. In addition, you can specify a cash discount percentage as part of a pricing level. Simply check the box on the screen if the cash discount applies.