



CUC Software, Inc.

1645 Ave D, Suite A
Billings, MT 59102

Phone: 800-272-9908

Fax: 406-254-9679

Email: sales@cucsoft.com

Web: www.cucsoft.com

ESSENTIALSPRO® - THE POINT OF SALE INVOICING MODULE®

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

- Create a job
- Set up an invoice
- Post material from inventory
- Post work complete on the job
- 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

The Point of Sale Invoicing option 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 your tech is invoicing in the field or if parts are being picked up at your showroom to be added to an existing job.
- Independent of a job – Create an invoice without a job for sales of items, like filters, being sold over the counter that need to come out of inventory, but you don't necessarily need to track service history on.

INVOICING

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

In order to post parts out of inventory to a Point of Sale invoice, the "Do Cost Acctng" option must be checked. The default for this option can be set under your Receivable General Information. If this option is checked, the quantity on hand is reduced, items are expensed and the appropriate cost is allocated to the job (where applicable) when the invoice is saved.

APPLYING A PAYMENT

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.

Credit Card Payments can be processed at the time the invoice is created if you have activated our [credit card interface](#).

CUSTOMER PRICING LEVELS

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.