

Adding Flyers to Invoicing

Overview

The promotions button on the Invoicing screen has the ability to allow the user to specify a currently running, or Future Dated flyer and have it available as a clickable item under the promotions button on the COUNTERPOINT Invoicing screen.

This also sets up attachment's to be included with Customer A/R Statements

Setup

To do this the user must save the PDF document in the Z drive on their system under the HTML directory.

Once filed there they must identify the flyer by name using the Flyer Maintenance program.

The instructions below walk the user through the process of doing this.

Step 1

- Open the PDF Document on your PC with Adobe
- Click **File - Save a Copy** Navigate to My Computer select Z:\Flyer - and Click "Save"

Write down the name that you saved it under as you will need this for the next step.

Record Capitals and lower case exactly as this is important.

Step 2

Using Menu Search (Tab key from any menu - or Mouse Click on the Binocular Icon), Search for "FLYER". Because there is only one program with that name, it will launch the program.

Enter 1 - ADD FLYER

Add Flyer

1	Flyer File Name Enter name WITHOUT .pdf file extension
2	Description
3	Distribute Until / .. / ..

Fill in the fields as required.

When complete Hit F1-Accept.

Close the program.

Flyer should now be available as a clickable option under Promotions Button.

Revision #2

Created 1 October 2018 15:52:18 by Admin

Updated 29 October 2021 23:59:30 by Jim