

Invoice Price Change Restrictions

Definition

Counterpoint has been updated to provide the ability to restrict Sales Clerks from changing prices. For this process to work it is required that all users have a unique login ID for Counterpoint.

Processing

Clerk Maintenance

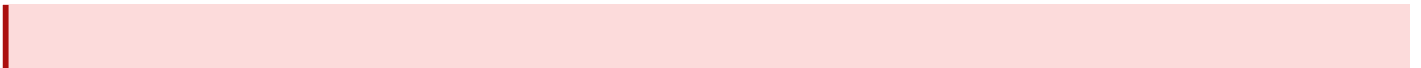
The User Login ID can be assigned to a clerk and this will force the clerk number used on the invoice based on the Login ID. They will not be able to change the clerk number when processing an invoice or credit note.

The Sell Below Cost option prohibits the clerk from selling below cost.

The Invoice Prices options are:

- Y - Display the price level in the information window and allowed to view/key on the invoice line
- N - Do not display in the information window and do not allow entry in the invoice line
- L - Do not display in the information window but allow entry in the invoice line to see the price value.

Disallow Price Changes will prevent the clerk from changing prices without the entry of a PIN code by a user that IS allowed to change prices. The Disallow Price Changes field MUST be set to N in order for a clerks PIN # be allowed to authorize a price change.



For these changes to be effective those clerks authorized to changes price should reset their PIN #'s and keep them private.

Clerk Number		3		1	Login	amslogin		Change Clerk	
2	Name	CLERK #3				Last Invoice		2022/05/09 1028	
4	E-mail Account					1 2 3 4 5 6		1 2 3 4 5 6	
5	Sell Below Cost?	N	(Y/N)	6	Invoice Prices (Y/N/L)	YYNNNN	12	Cat. Prices	YYNNNN
18	Pin #	3		19	Show Makes / Models By Alpha or Number?	N		(A/N)	
20	Add Part #'s to Inventory	Y	(Y/N)	21	Show Years / Makes / Models Always?	N		(Y/N)	
22	Quick Line Invoice Entry	N	(Y/N)	23	Disallow Price Changes?	Y		(Y/N)	

Todays Sales		This Months Sales	
Charge	.00	Charge	2043.93
Cash	.00	Cash	11.70
Card	.00	Card	52.73
Core Returns	.00	Core Returns	.00
Cost Of Sales	.00	Cost Of Sales	1379.61
Gross Profit	.00	Gross Profit	728.75
Payments	813.82	Payments	2061.43
Invoices	3	Invoices	24
Transfers		Transfers	
Invoice Lines	3	Invoice Lines	48
Lost Sales		Lost Sales	
Catalogue	0	Catalogue	0

Any change? **1.**

Invoicing

With the Sales Clerk Login ID assigned the clerk number will be automatically entered after the customer is entered. Using the Field Up, Field Down or Enter will not allow access to the clerk field of the invoice, therefore preventing them from changing the number to be allowed to change prices.

If the Sales Clerk is set to Disallow Price Changes, when entering an invoice line the clerk will be prompted to "Enter pin #:" if there has been any changes to the price or discount when the line is completed.

The options at the "Enter pin #:" message are:

- Have an Authorized clerk enter their PIN #
- Reject at the message to go back to the invoice line and put the price back to what it started at
- Reject at the message to go back to the invoice line and reject the line to remove it from the invoice

If the sales clerk is not allowed to change prices and the Customer number is changed on an invoice, they will no longer be offered the option to Recalculate the prices, the prices will be

recalculated automatically based on the new customer on the invoice.

Customer # 000365		Bill To 000365 CANADIAN TRUCK		Wed May 11 2022 12:09:19	
CANADIAN TRUCK REPAIR		Ship Via		Payment Method	
3879 RAILWAY AVE		Notify GERRY JONES		Account	
VANCOUVER		Salesman		Transaction Type	
V5X 2P2		GST Lic. # ON FILE		Invoice	
Phone (780) 888-3244		PST Lic. # 12345678		Clerk # 3 CLERK #3	
BC		FOB		PO # 2	

line	type	Part Number	Description	Quantity	Eco Fee	Core	plv	Net Price	+/-%	Extension	tax
1	G		Fuel Surcharge							10.00	10
2											
3											
4											
5											
6											

Line	Type	Part Number	Quantity	Eco Fee	Core	plv	Unit Price	+/-%	Extension	gst/pst
2B		BR5	2	.00	.00	2	19.95		.00	10

Description BEARING		On-hand	
On-Hand	4-	Category 360 SKF (CR)	21.65
On-Order Qty	Expected /	Promotions	19.95
Committed Qty	Supplier 0000140	Levy Code	
Customer b/o	Package 1/EACH		
Supplier b/o	Bin Loc.		
Remarks	Last Order Date 2018/10/15		

Sub Total		10.00
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Enter pin #:

F1 Accept	F2 Go to Footer	F3 Last Price	F4 Up One Line	F5 Line Down	F6 Catalogue	F7 Interchange	F8 Add Comment	F9	F10 Find Product	F11 Return Srch	
F1 Insert Line	F2 CARDEX	F3 Delete Line	F4 Branch Inq.	F5 Product Inq.	F6 Recall Query	F7 Core Bank Inq.	F8 Buyers Guide	F9 Blank Query	F10 SHORTCUT	F11 Cust. Notes	

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Created 19 May 2022 21:54:40 by Jim

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