

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

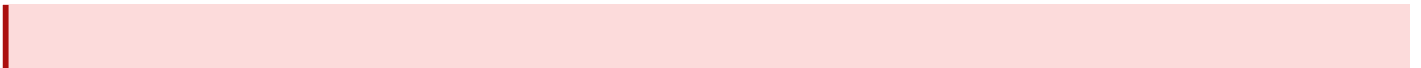
The User Login ID can be assigned to a clerk and this will force the clerk number used on the invoice based on the Login ID. They will not be able to change the clerk number when processing an invoice or credit note.

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

000365 CANADIAN TRUCK

Wed May 11 2022 12:09:19

CANADIAN TRUCK REPAIR

3879 RAILWAY AVE

VANCOUVER

BC

ON FILE

2

3 CLERK #3

Invoice

Phone (780) 888-3244

GST Lic. #

PST Lic. #12345678

FOB

PO #

Clerk #

Payment Method

Account

Transaction Type

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)

Expected

/

/

Promotions

21.65

19.95

Supplier

000140

Levy Code

Package

1/EACH

Bin Loc.

Last Order Date

2018/10/15

BRANCHES

On-Order Qty

Committed Qty

Customer b/o

Supplier b/o

Remarks

Sub Total

10.00

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

Find Product

F10

Return Srch

F11

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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