

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

  

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

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

  

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

  

Line	Type	Part Number	Description	Quantity	Eco Fee	Core	p/v	Unit Price	+/-%	Extension	gst/pst
2B		BR5	BEARING	2	.00	.00	2	19.95		.00	10
Description											On-hand
On-Hand											4
Category											360 SKF (CR)
Expected											/ /
Supplier											0000140
Package											1/EACH
Bin Loc.											
Last Order Date											2018/10/15
Sub Total										10.00	

Enter pin #:

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

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