

Setting Up Invoice Copies

COUNTERPOINT™ Provides a feature that allows you to set up the capture of a customers invoices for reprinting on Plain Paper at Month end. If there are customers set up with this feature, at the end of the statement run you will be asked to put plain paper on the printer and all invoices created during the statement period will be reprinted on Plain paper. This feature is turned on using the following procedure.

Bring up the customer A/R record in change mode using the following menu path

1. Accounts Receivable...->1. Data Maintenance...->1.Customers

This will bring up the following screen.

The screenshot shows the COUNTERPOINT software interface. The title bar reads "COUNTERPOINT" with standard window controls. The menu bar includes File, Edit, View, Session, Config, Special, and Help. The toolbar contains various icons for file operations and navigation. The main window is titled "Customer File Master Maintenance" and has a "Change Account Mode" button in the top right corner. The screen is divided into three main sections: Basic Information, Operating Controls and Pricing Parameters, and Financial Control Settings. The Basic Information section includes fields for Account # (1445), Name (STAN BAKER TRUCKING), Bill To (BOX 1379, KASLO, BC, VOG 1M0), A/R Method (B), Phone Number ((604) 250-3605), Fax Number ((604) 921-7592), Contact (STAN), Salesman (1, Unknown), Territory (0001), Start Date (1999/11/3), GST Lic. #, PST Lic. #, and Remarks (ONLY FRED MOE AND CURLY). The Operating Controls and Pricing Parameters section includes fields for Default Shipper, Standing PO Number, Start/End dates, Industry Reporting Group, Default Payment Terms, Default Invoicing Branch, Account Control Flags (c, A, P), Overdue Control Flag (2), Sales Summary Number, Allow Contract Pricing? (Y), Global Discount Type (OO), and Prefer Quotations Via (E). The Financial Control Settings section includes fields for Credit Limit in \$'s (10000.00), Rating, Allow Prompt Pay Discount? (Y), Max. Number of Days (10), Discount (2.00%), Require Statement? (Y), Service Charges? (N), ME Invoice Copies (0), and Redirect To. A tooltip at the bottom of the Financial Control Settings section reads: "Dual purpose flag. If copy of all invoices required with statement enter 1 here. If extra copies required at POS enter 2." The Windows taskbar at the bottom shows the Start button and several open applications, including Maxi..., Eudo..., 2 I..., Micr..., AniT..., Blan..., and COU..., along with the system clock showing 11:28 AM.

Customer File Master Maintenance									
Basic Information									
Account #	1445	7	A/R Method:	B					
2	Name:	STAN BAKER TRUCKING	8	Phone Number:	(604) 250-3605				
3	Bill To:	BOX 1379	11	Fax Number:	(604) 921-7592	14	LD.?	N	
		KASLO, BC	15	Contact:	STAN				
		VOG 1M0	16	Salesman:	1	Unknown			
			18	Territory:	0001				
19	Start Date:	1999/11/3	22	GST Lic. #:		23	PST Lic. #:		
24	Remarks:	ONLY FRED MOE AND CURLY							
Operating Controls and Pricing Parameters									
25	Default Shipper:		36	Account Control Flags:	c A P				
26	Standing PO Number:		44	Overdue Control Flag:	2				
27	Start:	/ /	30	End:	/ /	45	Sales Summary Number:		
33	Industry Reporting Group:		46	Allow Contract Pricing?:	Y				
34	Default Payment Terms:		47	Global Discount Type:	OO				
35	Default Invoicing Branch:		48	Prefer Quotations Via:	E				
Financial Control Settings									
49	Credit Limit in \$'s	10000.00	54	Require Statement?:	Y				
50	Rating:		55	Service Charges?:	N				
51	Allow Prompt Pay Discount?:	Y	56	ME Invoice Copies:	0				
52	Max. Number of Days:	10	53	Discount:	2.00%	57	Redirect To:		Summary Account #

Tab to search

Dual purpose flag. If copy of all invoices required with statement enter 1 here. If extra copies required at POS enter 2.

The field that controls this feature is Field 56. As the prompt shows - entering a 1 in this field will cause the system to capture an image of all invoices done during the statement period for reprinting on plain paper after the completion of the statement printouts.

by entering a 2 in this field you can also cause the printer to produce 2 copies of EVERY invoice generated for this customer whenever they make a purchase.

If you wish to set up the multiple copies at time of purchase you must also set one of the fields in 36 to "M".

Once set up WITH A "1" in Field 56 this customers invoices will be captured from this point forward for Month end plain paper reprinting.

Revision #1

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