

Lightening Round Tips

Small things to make your life simpler...

1. Adding a customer to an invoice from a customer card:

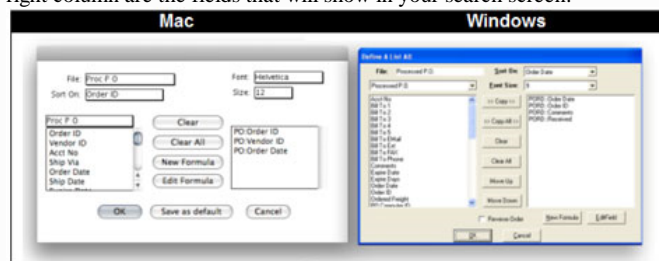
You've just found the right customer card (or finished making a new one) and now you want to put that customer on an Invoice. Don't memorize... don't copy and paste... simply press the F11 button. This adds the customer to the current open invoice.

2. Customizing your List Alls or Search screens:

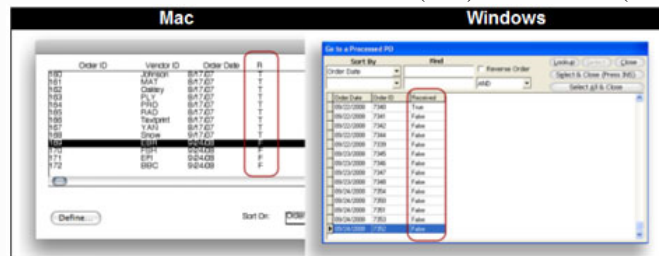
When you perform a search does the info displayed on the search screen not help you find what you were looking for? Customize the list all to display the columns you want to see.

This has many uses... I like to use it to see if a Processed Purchase Order has been received. The following steps will walk you through an example pertaining to POs, but this option is available on any Search (View, Choose, Item ID, etc) button.

1. Open the Processed Purchase Order card.
 - a. Mac Users: Hold down the option button and click on the View button on the top of the card. Another way to do the same thing is to click the View button and click the Define button in the bottom left corner of the search screen.
 - b. Windows Users: Right click on the View button on the top of the card. Choose Edit View Definition.
2. The definition screen for your search button is displayed. Choose the fields you want to show on your search screen from the left column and click the Copy button to move them to the right column. All of the fields listed in the right column are the fields that will show in your search screen.



3. To view which Processed Purchase Orders have been received select Received from the left column and copy it to the right column.
4. Click the OK button to save and finish.
5. Click on the View button at the top of the Processed Purchase Order card. You can now see if the PO has been received (True) or not received (False).



3. Discounting a single item on an invoice:

Discounting a single item is VERY easy. After you scan the item into an Invoice press the - (minus) button. On Mac your cursor is moved to the price field and a negative sign is displayed. Type in the discount percentage and press enter. On Windows a screen will open asking for your discount percentage. Type the percentage discount and press OK.

4. Undoing a mistake:

For Windows: Right click on the card and choose Revert. This will undo anything that has not been saved yet.

For Mac: Select Edit >> Undo. This will undo your last change to the field where your cursor is located.

