

Control File Business Options

Open Others>Control System>Business Options>Business Options and the following screen will appear:-

INVOICE PRINT OPTIONS

Automatically open stock search window for F3 stock - With more clients using barcode scanners to enter Stock Codes, this has become a method for us to have the system setup to accept Barcoding when entering Stock Items onto a Job. It means that the Stock Search screen does not automatically appear, and you are required to 'Enter' to enable the Stock Search. By ticking this option, when adding Stock to a Job and you are not using a barcode scanner, the Stock Search will be the first screen to appear when you select the F3 button in Customer Invoicing.

Display Invoice and Quote prices Inc GST - If this box is ticked it means that line amounts in Invoices/Quotes etc. will show the price including GST, as well as showing total GST at the bottom of the document. If this box is not ticked, it means the individual line totals will show without GST, and the GST will only be displayed at the bottom of the invoice as the total GST for the Invoice. It is important to note that in order to see the line totals on an Invoice, you must de-select the "Don't Print Line Amount" option on the Print Job window or permanently tick the box in the Control System.

Display Msg if no labour Charged on an Invoice - If this box is ticked, you will receive a warning message when finalising a Job if no Labour has been charged on the Invoice. If you are in a service industry and all of your Jobs entail some Labour, this will avoid missing charging Labour on Customer Invoices.



Display Warning when finalizing a progressive invoice - When doing Progressive Invoicing, if you finalise the Invoice while there are no more un-ticked lines on the Job, the Job is then removed from the Invoicing screen. Sometimes a Progressive Job ends up being removed from the Invoicing screen by mistake. If this box is ticked, when you finalise a Progressive Invoice and there are no more ticked lines on the Job, you will be prompted with a message that the Job will be closed, and removed from the Invoicing screen. You then have the option to return to the Invoice if it is required to be left open.

Don't Auto save Jobs - With the new Customer Invoicing screen, when in Revise mode you can have the system automatically 'Save' entries as they are happening. While this is a very handy function, you may find that if you have perhaps deleted a few lines, and a few too many, then those lines will be lost and cannot be retrieved. If this box is ticked then the 'Revise' screen in Jobs is NOT autosaving and you must click on the 'Save' button to save information when completed. So if you have deleted a few lines too many, which we all do from time to time, you can just close the screen without saving and open the Job back up again and you won't have lost those lines which were deleted by mistake.

Don't allow sale into negative stock - If this box is ticked, this means you cannot sell a more stock than you have on hand. When finalising an Invoice, a message box will pop up with a window saying that the system has adjusted the Stock Qty, and the Stock Quantities will automatically be adjusted to only the quantity of available stock. This alleviates the problem of selling more than you have in Stock and eliminates Negative Stock.



Do not change Actual Labour hours when Qty is changed - When invoicing Quantities for Labour and Stock, the system will automatically make the actual Quantity to be the same as the invoiced Quantity. If you do not wish to have the system change the actual Quantity when the invoiced Quantity is changed, this box should be ticked. Then the invoiced Quantity and actual Quantity will be independent of each other.

Enable Parts Link Button - When Customer Job Invoices are finalised, the system automatically collates the parts used for the particular Job Item, provided the Make and Model for the Job Item have been chosen from the Make and Model file in AM-Win. These parts are being stored in the Parts Link button in Job Invoicing. This function allows you to choose Multiple Stock Items from the one screen to be added to the Job and enables the P/Link button in Job Invoicing.

[P/Link](#)

Enable Progressive Job Posting - This option allows you to finalise an Invoice in stages, e.g. part of the Invoice may be finalised to an insurance company, with the rest of the Invoice being finalised to the Customer, but with the same Job Number being maintained. This is known as Progressive Invoicing. If you wish Progressive Invoicing to be available in your program, then left click into the box and a tick will appear. When you do a Job Invoice the Progressive Invoicing box will be automatically ticked in the top left hand corner of the screen.

Job Invoicing

JOB Location > Head Office Progressive Invoice GST Exempt

Enable re-price whole Job button - When Stock is sold on a Customer's Invoice, the system holds the Average Cost as the Cost Price of the Stock Item at the time of the Stock Item going on to the Job. If your business works in a manner where the Jobs are open for quite some time, you might require to have the costs updated as times goes by. If this option is ticked, the Cost and/or Selling Prices of the individual lines on the Job will be updated each time the Re-price is selected. This will enable more accurate profit being presented on the Invoice statistics.

Recost Options

Do you want to Recost the Sell Amount, Cost Price, OR BOTH?

Sell Only Cost Only **Both** Abort

Enable Reprice Stk masterfile from Job Invoice PLR Window - If this box is ticked it will enable the Reprice button to appear on the Insert Part Record screen in Job Invoicing. This will enable you to permanently change a Selling Price for a Stock Item from within Job Invoicing, by clicking on the Reprice button after changing the Selling Price. The Stock Masterfile will automatically be updated.

Change Part Record

Part > EO Alternate >

Engine Oil -- Refer Specs.

Del Status Issued

Discount Rate % Extension 26.50

Qty	Price Excl	Price Incl	Units	Less Disc
3.200	7.528	8.281	LITRE	

Bin No Total 26.50

OK Cancel Reprice - F5 C P S A

Force salesperson code on Invoice - If this button is ticked, the system will force you to enter a Salesperson Code onto the Invoice when you finalise the Invoice. This can be used to allocate Jobs to mechanics etc., or you could even set up the Salesperson Codes such as SV for service work or GN for general work. This will flow on to reporting for Invoices by the Salesperson, or if set up differently, reporting for Invoices that were for Service work or General work etc. The Salesperson set up is under Others, then Maintenance, then Salesperson File, and will be covered later. Various examples have been shown below:-

Select Salesman

Locator

Init	Salesman
AC	ANDREW
DR	DAVID
ET	EDDY
GN	GENERAL WORK
JJ	JOHN
PB	PETER
RT	ROSS
SV	SERVICE WORK
TE	SALESPERSON OR CATEGORY

Select Close

From Wkshp Diary use NEW Job Invoicing - When you are in the Workshop Diary and you click on the Invoice button, you have the choice whether to open the new Job Invoicing or old Job Invoicing screen. If this box is ticked, the NEW Job Invoicing screen will open instead of the old Job Invoicing screen. Both screens will update the system accordingly. The old Job Invoicing screen will be removed from the AM-Win software in a future version.

Must enter meter reading in Job Invoice - If this box is ticked, you will be forced to enter a meter reading when finalising an Invoice. This may be kilometres if relating to a motor vehicle, or hours if relating to a boat etc. If you do not wish to have this field forced to have a value entered into it, leave it un-ticked.

Prompt to Enter cost price when selling a Ledger item - When selling a Revenue (Ledger) line on a Job, the system will use a margin which is preset in the Control File to calculate the cost of the Revenue line for the purpose of Invoice statistics. If you wish to ensure you always have an accurate Cost, you can have a message appear every time you use a Revenue line on a Job to remind you regarding entering the Cost, if it needs to be manually entered.

Require Estimated No of Hours in Job Invoicing - In Job Invoicing there is a field in which you can enter the estimated number of hours for the Job. This information is used in conjunction with the Employee File to calculate available number of hours in day from the Workshop Diary, or the field can be used as a reference only.

Show Credit Warning Note in Jobs/Order - If your Customer's account is overdue past their trading terms and this box is ticked, you will receive a warning message when creating a job or Customer Order.

Show Available Stock in PLR Window - When you press F3 in Customer Invoicing and you select a Stock Item, if this option is ticked, more information will appear on the screen to show Stock on Hand, what is allocated and how much Stock is available, then also what is on order. This is a very handy check to see immediately if Stock is actually available at the point of invoicing.

Change Part Record

Stock OIL Alternate >

OIL

Discount Rate % Extension 22.50

Qty	Price Excl	Price Incl	Units	Less Disc
5.000	4.09	4.50	LITRE	2.05

Bin No Total 22.50

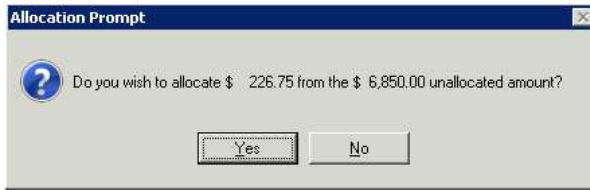
OK Cancel Reprice - F5 C P S A

On Hand	On Jobs	On Mnf	Available	On Order
96.000	5.000	0.000	91.000	0.000

On Hand	On Jobs	On Mnf	Available	On Order
96.000	- 5.000	- 0.000	= 91.000	0.000

Use Unallocated balance in Payment amount in Proforma – If your business receives a lot of deposits for Jobs, and the Customer requires to receive a Proforma Invoice as the Job progresses, this tick box will show the value which is in the Unallocated field in the Payment screen as a Payment on the Proforma Invoice.

Suppress Message 'Apply Unallocated balance to payments' – Sometimes it occurs that a Customer may have an Unallocated value on their account due to a deposit paid, or simply have a Credit which they have not taken up yet. If this is the case, when the Payment screen appears during the finalisation process of the Invoice, you will automatically be prompted to allocate this Unallocated value against the Invoice. You now have the ability to stop the system from showing this message and allocating the value if this option is ticked.



Show Alternate Code in Estimates & Invoices - If you are using Alternate Stock Codes and you wish the Alternate Code to appear on Estimates/Invoices instead of the Master Stock Code, then this box should be ticked, providing you also have the option ticked to print Stock Codes on invoicing.

Skip Invoice Payment Window - Part of the finalising process of a Job is that a Payment screen appears, giving you the option to enter a Customer Payment for the Job, if applicable. If you do not wish the Payment screen to appear at all, this box should be ticked. If this box is ticked, you must enter all Payments from your Customers through the Open Item Customer Payment screen.

Allow insert multiple serial numbers on job - This is a new feature of AM-Win. If you are selling a Multiple Quantities of a Serialised Stock Item, you are now able to select Multiple Serial Numbers from the one entry, providing this option is ticked.

Use Kit Description when importing items into a Job – When creating a Job Kit, sometimes you need to override the Stock description to suit the requirements of the Job Kit. Generally the system will override the description with the description of the Stock Item which is held in the Stock Masterfile. If you require the changed Stock description to be held when importing a Job Kit into a Job, then this option should be ticked.

Print payment Terms on Invoice Format 2 - For those users used to the Automate format for Customer Invoicing, we now have the option to print the Customers Trading Terms on the finalised Invoice. If you wish the Trading Terms to print, then this box should be ticked.

Don't Auto prompt on Auto Insert F4 Labour – When you enter Labour on to your Customer Invoice, if you would generally only use one Labour Code, ticking this box will stop the 'Insert Labour Record' screen from reappearing for further selection, after you have made your initial Labour Code selection.

Job Invoicing – No of days from Booked Date to Due Date – When creating a Job you can have the system automatically prompt to input the Due Date on the Job to be a set number of days after the Booked Date. Simply input the required number of days you would like the system to use as a calculation from the Booked Date.

Round Invoices & Stock Prices to nearest 5c/10c/\$1 - If you click on the down arrow you may choose either 'Yes' to round Invoice total to the nearest 5 cent/10 cent or \$ 1, or No for no Invoice rounding (this method is generally not recommended in the instance where you have Customers paying by cash). If you choose to have Invoices round to the nearest dollar, a total Invoice value ending in 50 cents will round up to the next dollar.

Close Job Screen after nn Minutes (value in mins) - Only 1 person can hold a Job open at any point in time. If you have a situation where several people need to access a particular Job during the day, but someone is holding it open for long periods of time (perhaps unnecessarily), you can nominate a minute count, where the system will determine if no updating is done on a Job for a certain number of minutes, the system will automatically 'Save' the Job and close it.

Number of decimal places for unit price - You can set the number of decimal points to be printed for pricing on Invoices and Purchase Orders. This is defaulted to 2 decimal places but you may wish to change this if you are selling petrol or other items that calculate to more than 2 decimal places.

Proforma Default Text Footer Number - When printing a Proforma Invoice, the system will use the Default Invoicing String which is set in the Printer Settings area. If you wish to have a different Text String print on your Proforma Invoices, then nominate the Text String number in this field.

Report Percentage Cost on Revenue - Allows the user to default a percentage figure used to calculate the Cost Price of a Revenue (Ledger) item from the pricing window in Job Invoices and Quotes. If a Revenue item is charged at \$100 and the Report Percentage Cost is 80% then the cost of the \$100 part will be shown as \$80.00. This is an estimate only and is not used to calculate your Profit/Loss or GST figures. If a COST has been entered into the GL Code for the Revenue item then this will be used in preference to the Report Percentage Cost and used in calculating statistics on Invoicing.

Report Percentage Cost on Labour - Allows the user to default a percentage figure used to calculate the Cost Price of a Labour item from the pricing window in Job Invoices and Quotes. If a Labour item is charged at \$100 and the Report Percentage Cost is 80% then the Cost of the \$100 part will be shown as \$80.00. This is an estimate only and is not used to calculate your Profit/Loss or GST figures. If a COST has been entered into the GL code for the Labour item then this will be used in preference to the Report Percentage Cost.

Estimate Options

Estimate Default Text Footer Number - When printing an Estimate, the system will use the Default Invoicing String which is set in the Printer Settings area. If you wish to have a different Text String print on your Estimates, then nominate the Text String number in this field.

Default no. of days on Estimate - You can set a number of days that an Estimate is valid for in the Control System, so that when you print out the Estimate, it prints the 'Valid For XX days' in the top section of the Estimate.

Membership Options

Job Payments – Make Points Amnt zero if Terms overdue – If you are using Membership points in AM-Win and this box is ticked, your Customer will not be able to redeem any points whilst there is an amount overdue past their trading terms.

Print Accrual points on Invoice – If you are using Membership points in AM-Win, you have the ability for the Customer to see the value of their accrued points print at the bottom of their Invoice. Tick this box to have the accrued points print at the bottom of your Customer Invoice.

User definable in Invoices & Workshop of Job Description - The Job Description in Customer Invoicing automatically defaults to General Work. If you wish to change the Dault Job Description, you may do so in this field.

