Documents Button

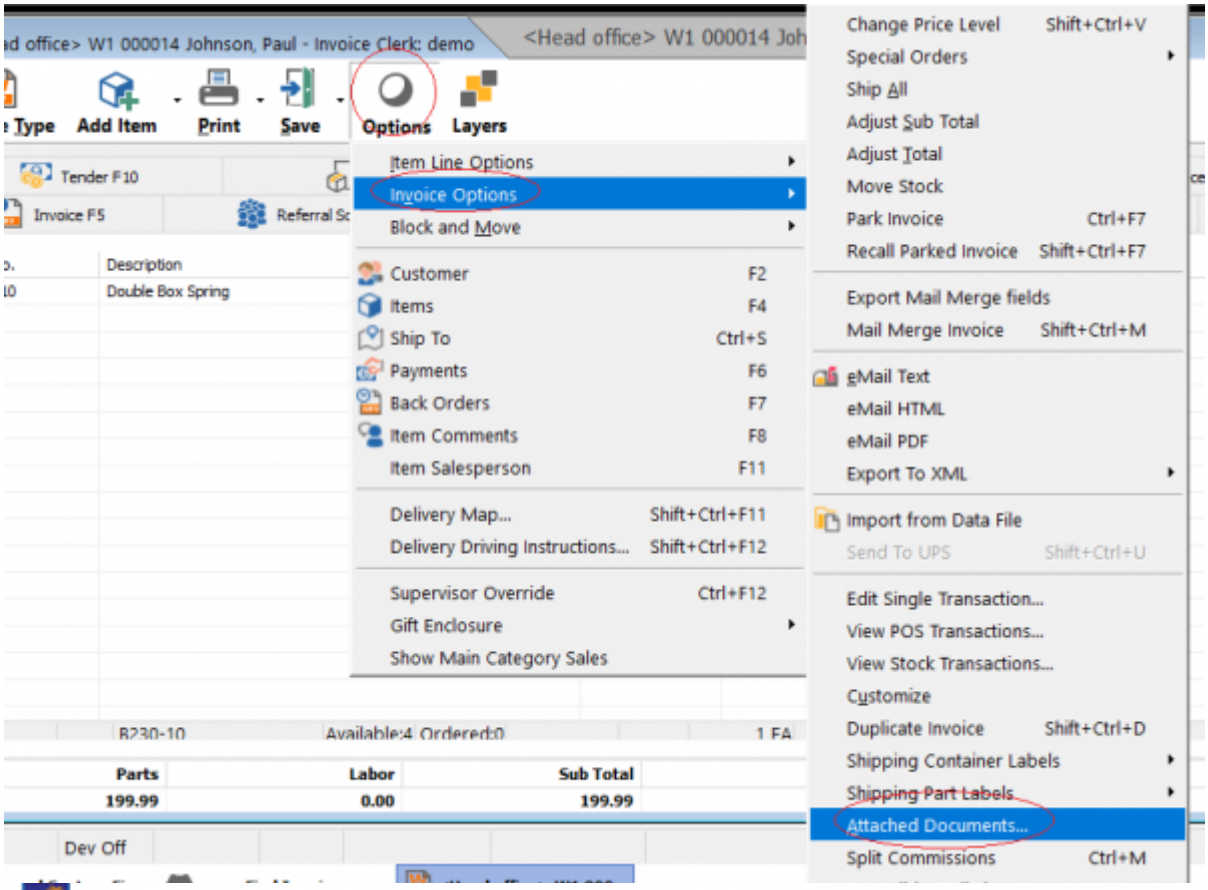
A documents button is now available at top menu bar in the invoice screen. This enhancement is aimed to improve the documents feature and extends the invoice screen. The clients can now quickly import and link documents and have the ability to add the documents directly to the invoice for easier access and upload.

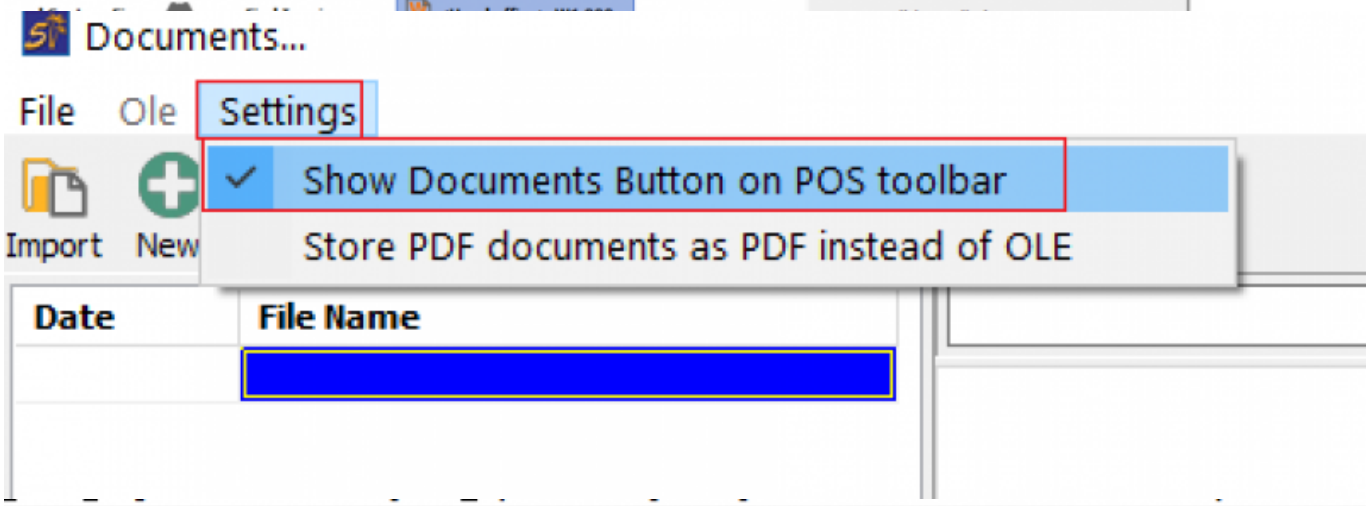
Must be able to install and run 6.2.4.x

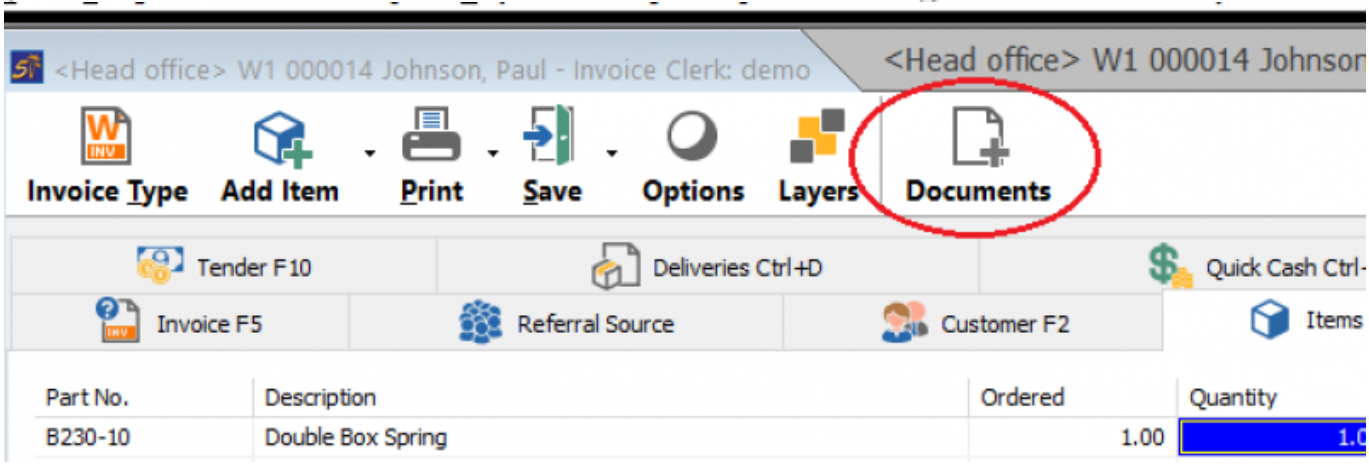
The document button can now be seen from the invoice screen and users can easily click this button to access the document window. The user can also further access, import and link items with the import and link buttons placed along the top bar of the document area. A visible exit button along the top bar of the document area additionally saves the customer's time to save and close work after having added all the necessary documents.

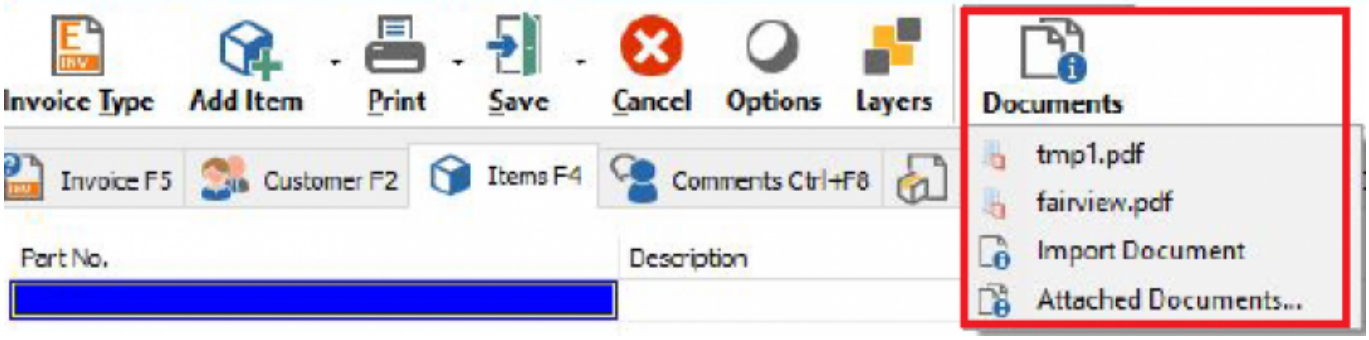
To enable this option, in an invoice, select options, invoice options, and attached documents, i n the File menu, select settings and click on the menu option to Show Documents button on the POS. This will then show the documents button on the top toolbar menu.

Note that the option to store PDF documents as PDF instead of OLE is for another customer's PDF filler enhancement as well as a temporary fix to help with cloud PDF viewing. It is not part of the SRS, but can benefit customers using the document feature enhancement.


Type
Add Item
Print
Save
Options
Layers
Tender F10
Invoice F5
Item Line Options
Invoice Options
Block and Move
Customer F2
Items F4
Ship To Ctrl+S
Payments F6
Back Orders F7
Item Comments F8
Item Salesperson F11
Delivery Map... Shift+Ctrl+F11
Delivery Driving Instructions... Shift+Ctrl+F12
Supervisor Override Ctrl+F12
Gift Enclosure
Show Main Category Sales
Change Price Level Shift+Ctrl+V
Special Orders
Ship All
Adjust Sub Total
Adjust Total
Move Stock
Park Invoice Ctrl+F7
Recall Parked Invoice Shift+Ctrl+F7
Export Mail Merge fields
Mail Merge Invoice Shift+Ctrl+M
eMail Text
eMail HTML
eMail PDF
Export To XML
Import from Data File
Send To UPS Shift+Ctrl+U
Edit Single Transaction...
View POS Transactions...
View Stock Transactions...
Customize
Duplicate Invoice Shift+Ctrl+D
Shipping Container Labels
Shipping Part Labels
Attached Documents...
Split Commissions Ctrl+M
Description
Double Box Spring
B230-10
Parts
199.99
Labor
0.00
Sub Total
199.99
Dev Off


Documents...
File
Ole
Settings
Import
New
Show Documents Button on POS toolbar
Store PDF documents as PDF instead of OLE
Date
File Name


<Head office> W1 000014 Johnson, Paul - Invoice Clerk: demo
Invoice Type
Add Item
Print
Save
Options
Layers
Documents
Tender F10
Deliveries Ctrl+D
Invoice F5
Referral Source
Customer F2
Items
Part No.
Description
Ordered
Quantity
B230-10
Double Box Spring
1.00



— *Jolib Balasabas 2021/01/29 20:10*

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