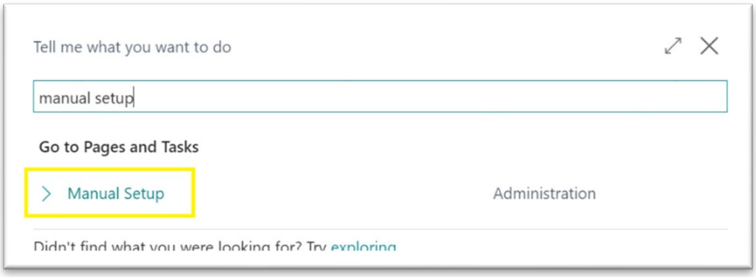
Advania Quick Sales

Setup and instructions

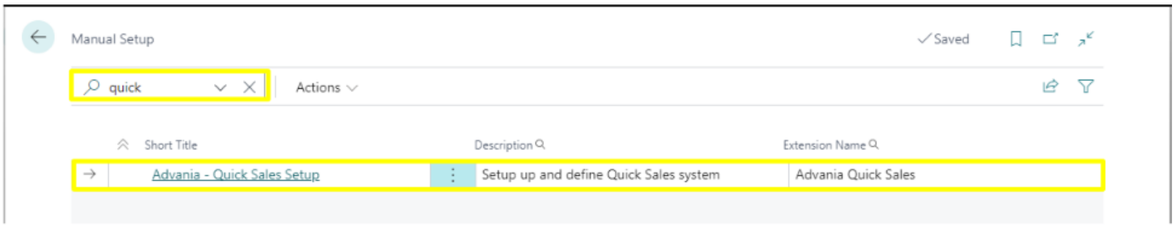
Advania Quick Sales

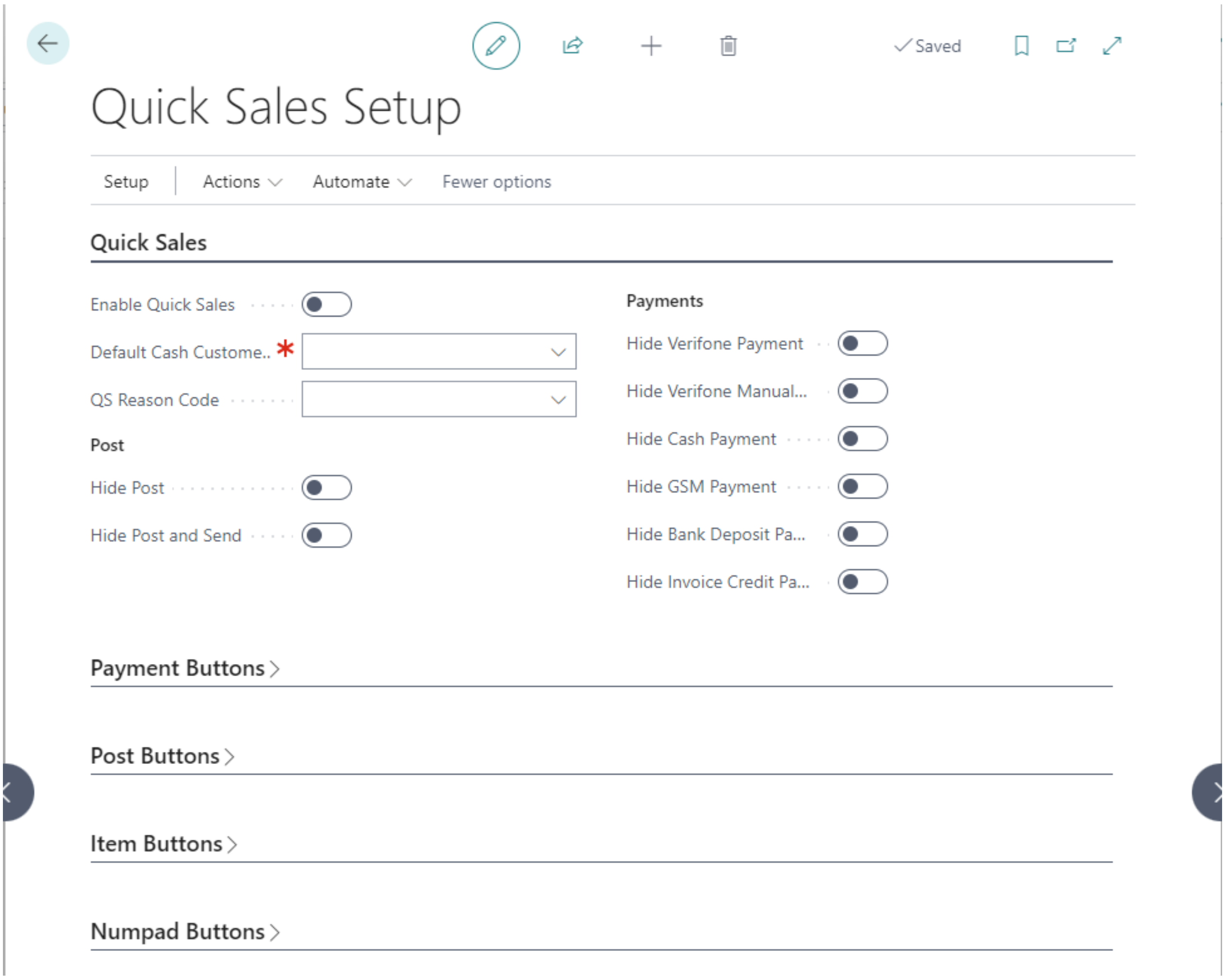
1. Setup

In Tell me search box type Manual Setup.



Look for Quick Sales Setup and open it.



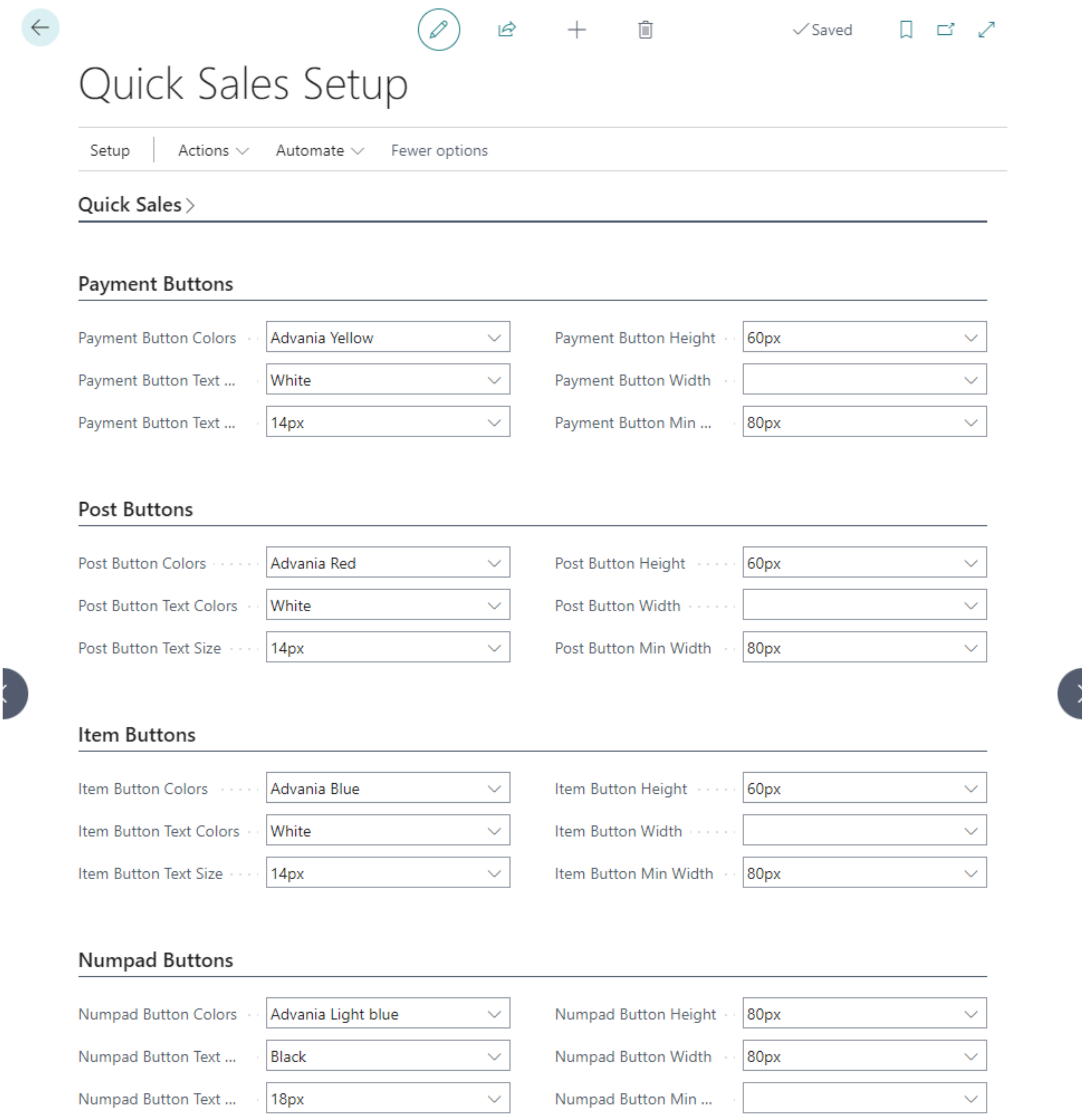


Default Cash Customer must be selected before enabling the solutions. This customer will by default be selected, when opening a new Quick Sales page.

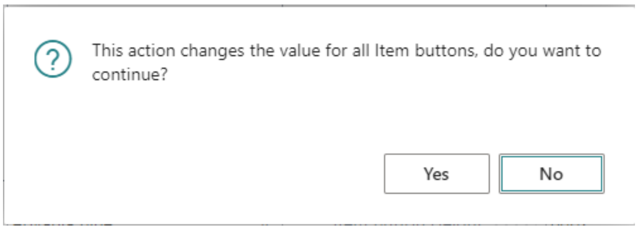
QS Reason Code selects the default reason code for all Quick Sales Sales orders, and can be used to filter the sales orders from standard sales Orders.

Under the **Post** caption you have two fields ***Hide Post*** and ***Hide Post and Send***, this allows the user to control what posting option they want to use on the Quick Sales Page.

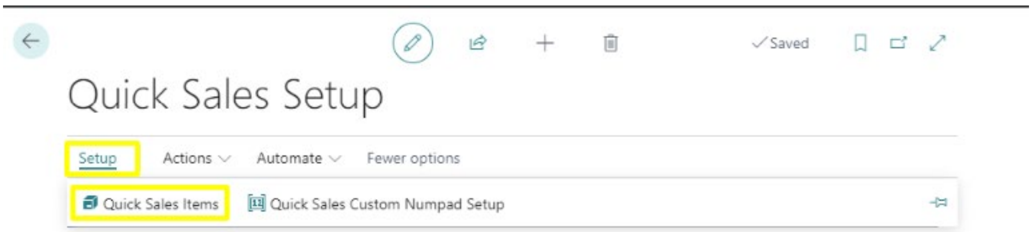
Under the **Payment** caption you have the option to hide payment actions from Advania Store and Advania Verifone Cloud Connection apps on the Quick Sales page. By default all options are visible when installing the app.



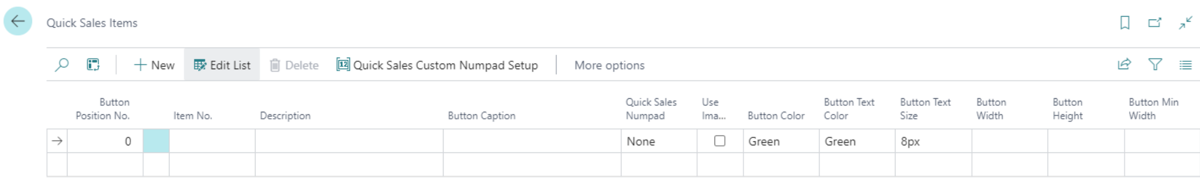
In the groups ***Payment buttons, Post Buttons, Item Buttons*** and ***Numpad Buttons***, you can make changes to *Button Colors*, *text colors, text size, Height, Width and Min width* for each button group. ***Item Buttons*** settings can also be changed for individual button on the page *Quick Sales Items* (see Quick Sales Items bellow), but changing any value from the Quick Sales Setup page will override any individual changes done on the Quick Sales Item page.



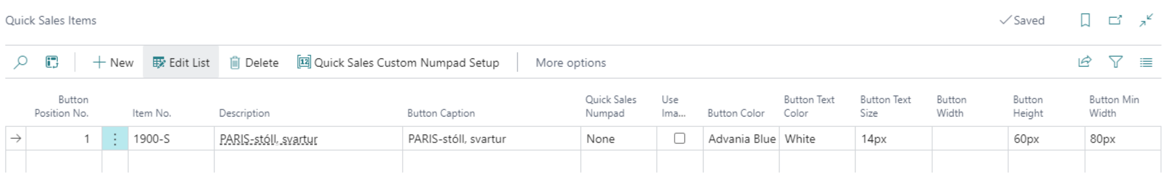
Next go to the *Setup* in the tab and select *Quick Sales Item*.



That will open the *Quick Sales Item* page, witch is the page where we select the items we want to display on the *Quick Sales* page. Users can show upto 50 Items as buttons on the *Quick Sales* page, If the are more then 50 Items in the *Quick Sales Item*s page then the first 50 will be selected (Based on the *Button Posting No.*)



Start by clicking on the field *Item No.* and select the item you want to add.



When you select an item you will get default values and values from Quick Sales Setup in the fields, witch you can then change for each item.

Here is a description on each field in the Quick Sales Item list page:

Button Posting No.: Integer field witch controls the positinon of the button on the Quick Sales page. When you add a new item it will increase by 1 (counts the nubmer of items in the Quick Sales Item table).If you want to change the position of the button, you can change this number. If more then one item has the same number the number that was added first to the record will be placed first. This number has to be a positive number.

Item No.: Number of the selected item, this field is linket to the Item table.

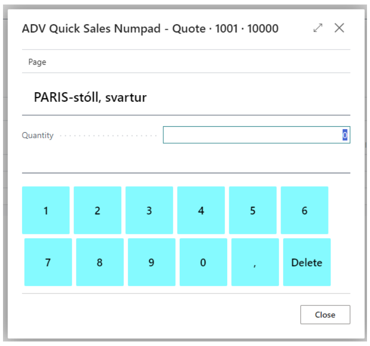
Description: Item description from the Item table.

Button Caption: Caption for this button on the *Quick Sales* page. When new item is added this fields copys the Description from the Item Card. You can edid the description in this field to fit the description you want on the button.

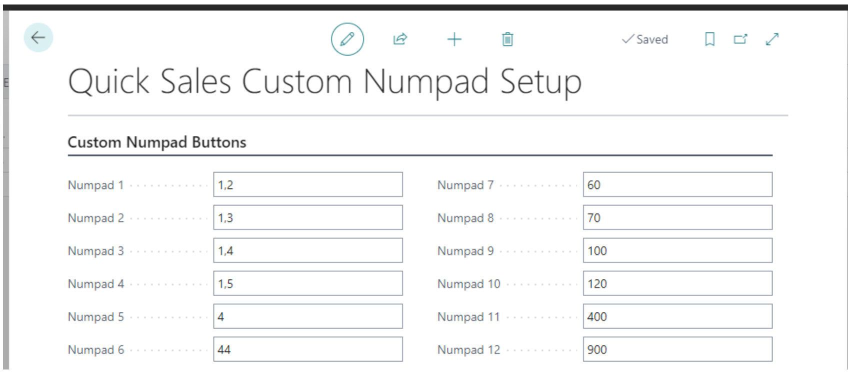
***Quick Sales Numpad**:* Is used to select if you want a numpad to be used to enter items quantity when the button is pressed.The field offers three options, *"None"*, *"Standard"* and *"Custom"*.

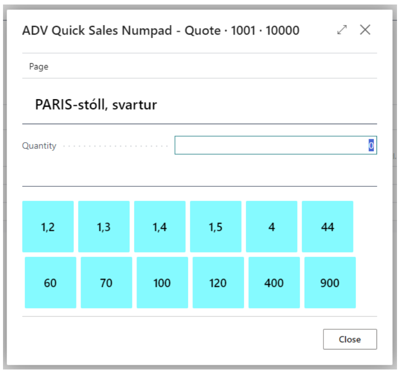
"*None"* is selecte, then when pressing the button the quantity in the line will be 1.

"*Standard*" is selected, then when the button is pressed you will get the standard numpad page to enter in the lines quantity.

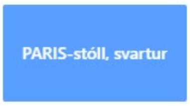


"*Custom*" is selected, then when the button is pressed you will get the custom numpad page to enter in the lines quantity. Users can select up to 12 values to use on the custom numpad page from the page *Quick Sales Custom Numpad Setup*. The page is accessable from the *Quick Sales Setup* and *Quick Sales Item* pages or by finding it from the Business Central search window.





Use Image: A field where the user can select if the button uses image instead of the button text. It gets the first image added to the item card page for selected item. If active you can hover over the image to get the Item description.

Field unactive: 

Field active:  Mouse hover over the image

Button Color*:* Select the button color for selected item.

Button Text Color*:* Select the button text color for selected item.

Button Text Size*:* Select the button text size for selected item

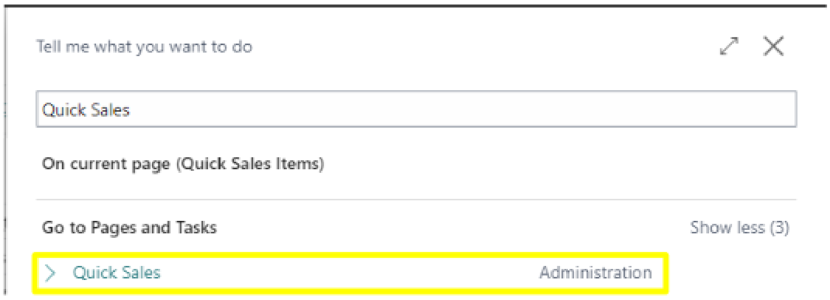
Button Width*:* Select the button width for selected item.If left empty the width is desided by the length of the button caption text..

Button Height*:* Select the button height for selected item. If left empty the default value is 60px.

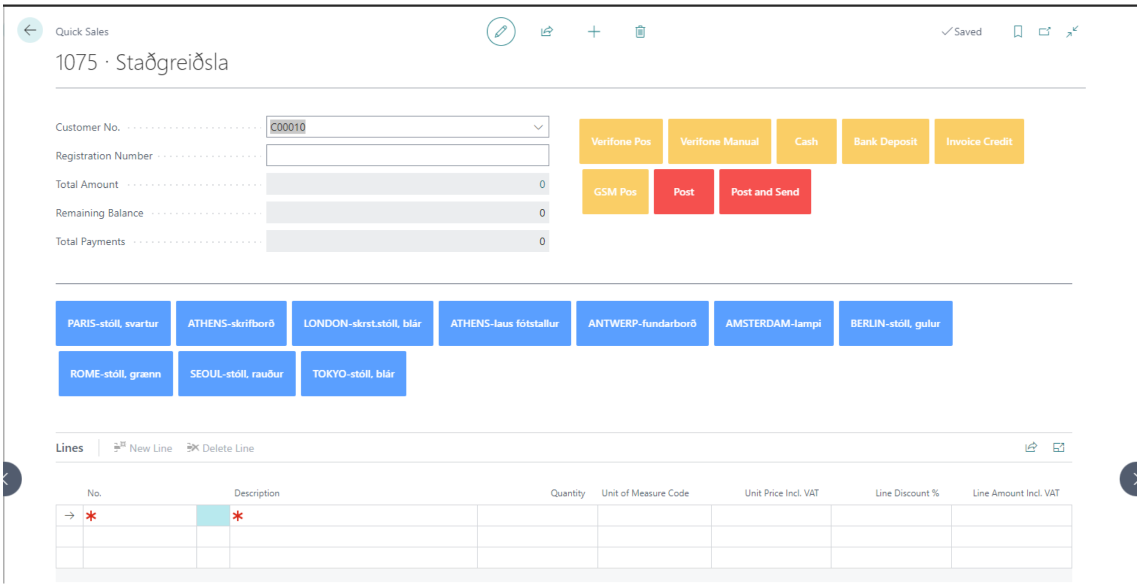
Button Min Width: Select the buttons min width, that is the width can be larger then this value but not smaller.

2. INSTRUCTIONS

To open the Quick Sales page, searce for *Quick Sales* in the Bussiness Central search window, and clik on Quick Sales..



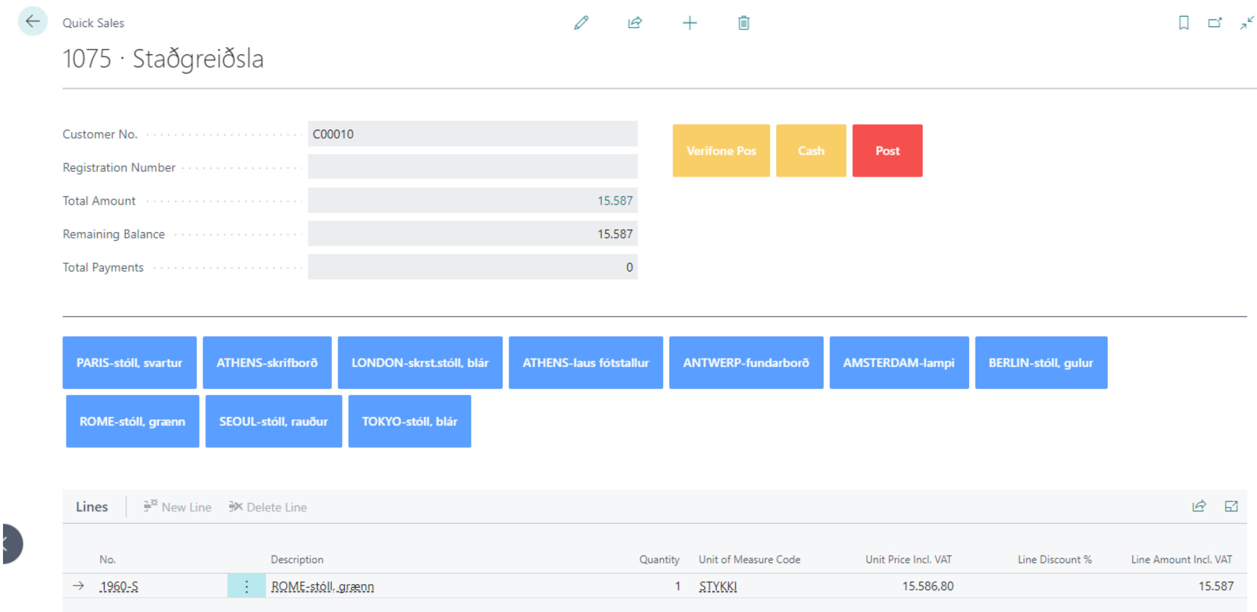
This will open the Quick Sales Page, witch creates a new Sales order.



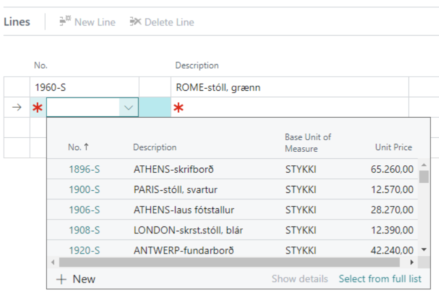
If you want to make any changes to the page for example add remove buttons or change the layout, go back to the settup instruction above. ATT If you change any setting in the *Quick Sales Setup* or *Quick Sales Items* you need to refresh the browser window (F5) to get the changes.

Customer No. will have the value from the field "Default Cash Customer" from the Quick Sales Setup page. Users are abel to change customers as needed. ATT you are not able to change customer on a Quick Sales Sales order after a payment has been made on that sales order.
Registration Numer is a standard field on Sales Header and you can add customers registration number to this field if they want it on the invoice.
Total Amount shows the total amount for current sales order.
Remaining Balance shows current status on balance, it updates after a payment is made.
Total Payments shows what payment have been processed on current Quick Sales Sales Order. ATT customers are unable to post a sales order that has not been fully payed if the *Customer No* is the same as *Default Cash Customer* in Quick Sales Setup.

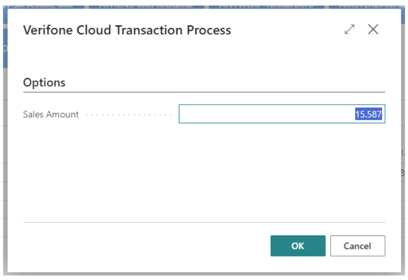
To Add an item to the sales line click on a item button you want to add to the line.



You also have many of the standard functions of sales orders for example add,delet or edit the sales lines.



After adding the items to the sales line you, select payment method by cliking on the coresponding button. In this example are we going to pay with Verifone Pos, so we click on the button and confirm the payment amount to send to the pos.



We finish the payment on the Pos end and get a respocen of sucsess and then *Remaining Balance* and *Total Payments* are updated and now we can go and post the Sales Order, using the *Post* button.