



## U2009.1 Release Documentation

### Accounting & File Maintenance Updates

#### **Menu 4 - Accounts Receivable**

**Description: Option to reprint customer statements using a range of customers**

**Menu Path:** Menu 4.3.6.4 -Print/Fax/Email Statements from Last End-of-Month

**Why Use It:** Sometimes the need arises to reprint your statements for a range of accounts (EX: Printer runs out of toner in middle of statement run) and instead of knowing exactly which customers were missed, you can input a range of accounts.

**How it works:**

*When running Menu 4.3.6.4 and selecting options 2, 3 or 4, you will be prompted to select customers from a range. Answering no will process as usual. Answering yes will drop you into a screen from which you can select your range, then process the selected range of statements as normal (i.e. will print, fax or email based on the selected range).*

- Access Menu 4.3.6.4 and proceed through the normal prompts (EX: <CR> to continue, <CR> to run it for all customers, Enter the correct statement as of date, Select Options 1 thru 4)
- When prompted to put in a customer range, enter the beginning customer and the ending.

#### **Menu 12 - File Maintenance**

**Description: Check for quotes before deleting customer**

**Menu Path:** Menu 12.2.2.2 Customer Master, 'DELETE' option

**Why Use It:** In the past, a customer master record could be deleted, even if they had quotes hanging out there, pending. Now, the system checks against the quote file as well as for open orders, AR, etc.

**How it works:**

- Start by going in Menu 12.2.2.2 to delete a customer. Enter the account and type 'DELETE'. The system then runs its checks on the various customer related data to see if there are any pending quotes as well as open invoices, recent sales activity, open AR, etc.

**Description: When a customer exceeds their credit cap, there will now be a new option in the credit check to create a Quote (Q-quote) for the customer**

**Menu Path:** Menu 1.2, Order Entry Credit Check, Menu 12.2.2.2 Customer Master, screen 2 field 17. Credit Cap

**Why Use It:** Sometimes the customer's AR situation calls for another option. This allows you to build an order for a customer and file it away as a quote when they max their credit CAP limit instead of having to back out.

**How it works:**

- Based on the customer credit cap setup in Menu 12.2.2.2, screen 2, field 17. When a customer fails the credit check in order entry, in addition to the normal prompt, a prompt comes up; \*\*\*CUSTOMER IS OVER THEIR CAP CREDIT LIMIT OF 5000  
ENTER C-ANCEL OR QUOTE
- Enter 'Q' to create a quote for this customer.