

SALES

INTRODUCTION TO POINT OF SALE (POS) LITE

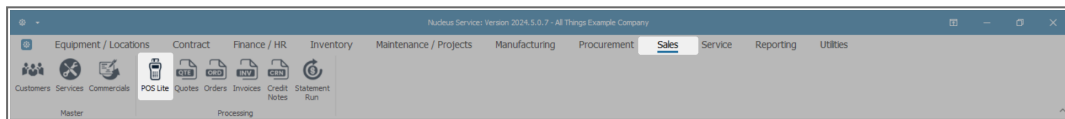
The POS (Point of Sales) Invoice screen was created as a simplified Over the Counter Invoice screen. With OTC Invoicing, stock must be manually issued after the invoice is created, but with POS Invoicing, stock is auto issued from the Auto Issue Warehouse. Only Inventory Items can be invoiced via this process.

Configuration Required:

- Company configuration flag:
 - AutoSaleIssue – enables auto sale stock issuing.
- Auto Issue [Warehouse Config](#) (1 auto issue warehouse per site)
 - Is Stock = 'Yes'
 - Is Asset = 'No'
 - Quarantine Location = 'No'
 - Is Default = 'No'
 - Auto Issue = 'Yes'
- [Sales Office](#) Config:
 - Identification of a customer as a cash sales account to be configured on the Sales Office. Ensure a Cash Sale Customer Account has been set up, linked to all sites and configured as the Cash Sales Account in the Sales Office(s).

- **User** Config:
 - The default site of the user is used to determine the auto issue warehouse and the cash sales account. Ensure that each user has a default site configured 'Default Site' in User Right screen for that user. (that they have security right access to).
 - For a multi-site environment, users must be in a site specific group (configured in user rights – AccessType: 'SITE').

Ribbon Select Sales > POS Lite



- The **Invoices** listing screen will display with a list of all the Cash Sale Invoices that have been processed.

THE PROCESSING BUTTONS

- From this screen you can utilize the following **Processing** buttons:
 - **Add** a new Transaction Invoice.
 - **Print** the Tax Invoice.

THE INVOICES DATA GRID

- The data grid lists all the **Sales Transactions** that have been processed.
- An **Invoice Number** is automatically generated for each transaction and will follow sequentially.

InvoiceNo	CustomerCode	CustomerName	DeptName	InvoiceStatus	InvoiceStatusDesc	InvoiceValue	Currency	Status	TaxRate	InvoiceDate	Comments	SalesmanName
KZIN0000023	6065001000	Self Off Customer	Sales	N	New	4,830.00	ZAR	A	15.00	31 Jul 2024	PSLite MNU068001.	Eden Rowan
KZIN0000024	6005715519	Carns Ozcroft CC	Sales	N	New	6,486.00	ZAR	A	15.00	31 Jul 2024	BNPPL068001	Briar Portillo
KZIN0000025	6075468708	MHRA Burhill CC	Sales	P	Printed	10,468.00	ZAR	A	15.00	31 Jul 2024	Invoice068001	Brightie B
KZIN0000026	6065001001	Cash Sale Account	Sales	N	New	10,005.00	ZAR	A	15.00	31 Jul 2024	CashSaleInvoicePSLite	Eden Rowan
KZIN0000027	6099963015	Painter Burghall Solutions	Sales	N	New	4,226.25	ZAR	A	15.00	31 Jul 2024	CustomerInvoicePSLite	Drew Nelson
KZIN0000028	6075468708	MHRA Burhill CC	Sales	N	New	6,210.00	ZAR	A	15.00	31 Jul 2024	MHRA PSLite	Eden Rowan
KZIN0000029	6065001001	Cash Sale Account	Sales	N	New	4,830.00	ZAR	A	15.00	31 Jul 2024	CashSalePSLite	Eden Rowan
KZIN0000030	6085742324	Form Fair Publishing	Sales	N	New	5,313.00	ZAR	A	15.00	31 Jul 2024	FormFair PSLite068	Eden Rowan
KZIN0000031	6065001000	Self Off Customer	Sales	N	New	5,313.00	ZAR	A	15.00	31 Jul 2024	PSLite068001	Faith Myers
KZIN0000032	6065001000	Self Off Customer	Sales	N	New	4,830.00	ZAR	A	15.00	31 Jul 2024	Invoice068001	Briar Portillo
KZIN0000033	6075468708	MHRA Burhill CC	Sales	N	New	4,830.00	ZAR	A	15.00	31 Jul 2024	MHRA Lite 068001	Daman Holland
KZIN0000035	6065001000	Self Off Customer	Sales	N	New	4,830.00	ZAR	A	15.00	03 Jun 2024	Customer PSLite068	Brightie B
KZIN0000036	6065001000	Self Off Customer	Sales	N	New	4,830.00	ZAR	A	15.00	03 May 2024	PSLite	Drew Nelson
KZIN0000037	6065001001	Cash Sale Account	Sales	N	New	5,313.00	ZAR	A	15.00	31 Jul 2024	SP2020 PSL	Eden Rowan
KZIN0000038	6065001000	Self Off Customer	Sales	N	New	4,830.00	ZAR	A	15.00	31 Jul 2024	PSLITE068	Eden Rowan
KZIN0000039	6065001000	Self Off Customer	Sales	N	New	4,830.00	ZAR	A	15.00	30 Apr 2024	SelfOffCustomerPSL	Eden Rowan
KZIN0000040	6065001001	Cash Sale Account	Sales	N	New	4,830.00	ZAR	A	15.00	05 Apr 2024	CashSale 068001	Eden Rowan
KZIN0000041	6065001001	Cash Sale Account	Sales	N	New	4,830.00	ZAR	A	15.00	19 Apr 2024	CashSale068000	Eden Rowan

COLUMN FILTERING

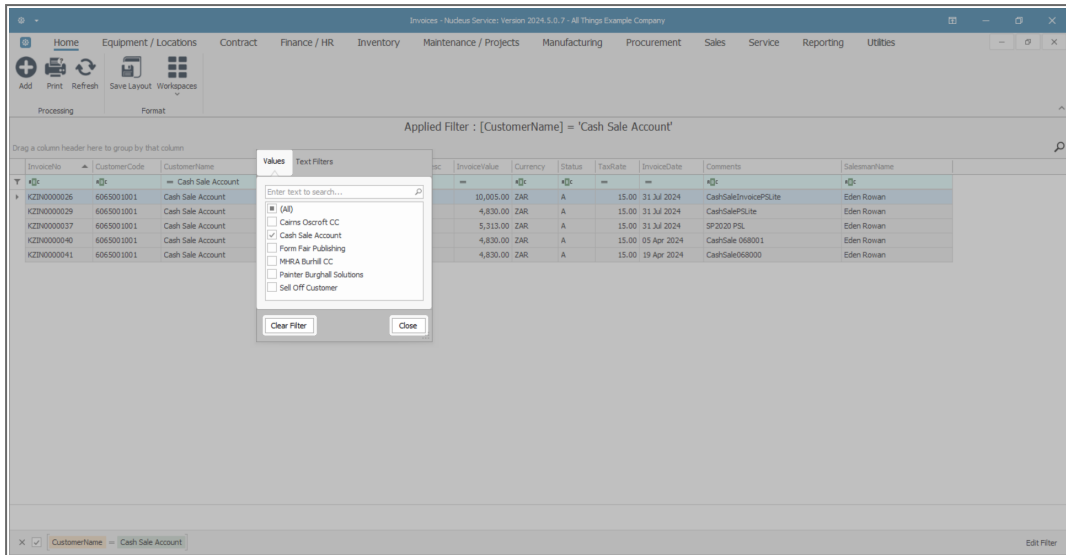
LIST BY CUSTOMER NAME

- Click on the **Filter icon** in the **Customer Name** header cell to display the **Filter option** screen.
- Scroll to the Customer Name and click in the **check box** next to it.
 - For the purpose of this manual, **Cash Sales Account** has been selected.



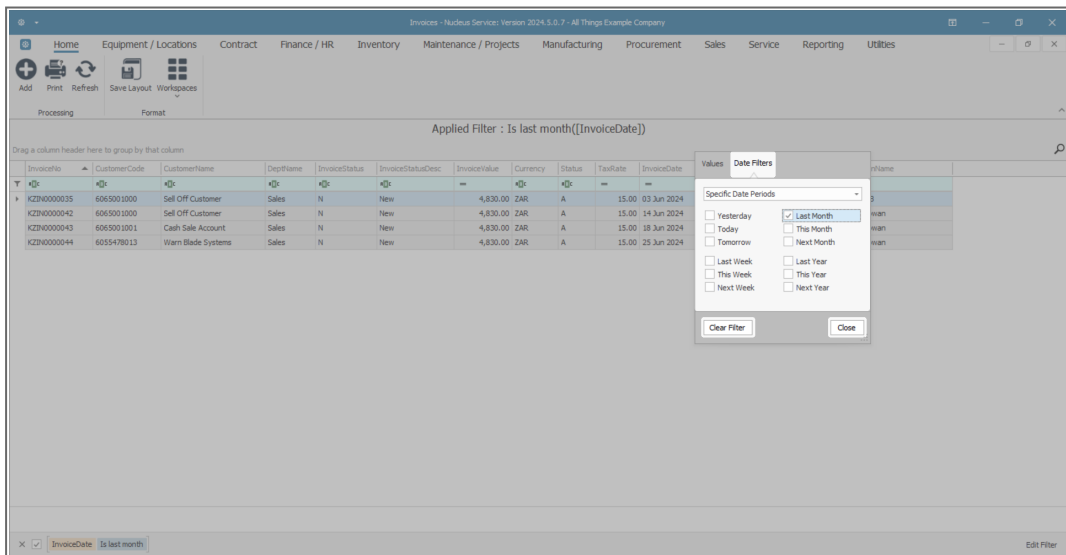
Note that only the Cash Sales Account entries are now listed.

- **Close** the screen if you are happy with your selection or **Clear Filter** to reset the filter to the default list.



LIST BY DATE

- Click on the **Filter icon** in the **Invoice Date** header cell to display the **Filter option** screen.
- The **Date Filters** options will display.
 - Click in the **check box** next to the date periods(s) you wish to display.
 - More than one check box can be ticked, if required.



LIST BY VALUES

The **Values** tab will display the numerical / alphabetical order of contents of a selected column.

- Click on the **Filter icon** in the **Invoice Date** header cell.
- Click on the **Values** tab to display the date values from the Invoices Listing screen.
- Click on the **check box(es)** you wish to display.
 - For the purpose of this manual, the month of **July** has been ticked.



Note that the information returned will only be for the selected date. In this example, the Invoice Date column will only display July dates.

- **Close** the screen if you are happy with your selection or **Clear Filter** to reset the filter to the default list.

The screenshot shows the 'Invoices' listing screen in the software. The 'Invoice Date' column is selected, and a 'Date Filters' dialog box is open. The dialog shows a tree view for the year 2024, with 'July' selected. The main table displays a list of invoices with columns for InvoiceNo, CustomerCode, CustomerName, DeptName, InvoiceStatus, InvoiceStatusDesc, InvoiceValue, Currency, Status, TaxRate, and InvoiceDate. The applied filter is shown as 'Applied Filter : [InvoiceDate] >= '01 Jul 2024' And [InvoiceDate] < '01 Aug 2024''. The status bar at the bottom indicates the current date range is from 01 Jul 2024 to 31 Jul 2024.

InvoiceNo	CustomerCode	CustomerName	DeptName	InvoiceStatus	InvoiceStatusDesc	InvoiceValue	Currency	Status	TaxRate	InvoiceDate
KZIN0000023	6065001000	Sell Off Customer	Sales	P	Printed	4,830.00	ZAR	A	15.00	31 Jul 2024
KZIN0000024	6005715519	Carrs Oscoft CC	Sales	N	New	6,486.00	ZAR	A	15.00	31 Jul 2024
KZIN0000025	6075468708	MHRA Burhill CC	Sales	P	Printed	10,488.00	ZAR	A	15.00	31 Jul 2024
KZIN0000026	6065001001	Cash Sale Account	Sales	N	New	10,005.00	ZAR	A	15.00	31 Jul 2024
KZIN0000027	609963015	Painter Burghill Solutions	Sales	N	New	4,226.25	ZAR	A	15.00	31 Jul 2024
KZIN0000028	6075468708	MHRA Burhill CC	Sales	N	New	6,210.00	ZAR	A	15.00	31 Jul 2024
KZIN0000029	6065001001	Cash Sale Account	Sales	N	New	4,830.00	ZAR	A	15.00	31 Jul 2024
KZIN0000030	6085742234	Form Fair Publishing	Sales	N	New	5,313.00	ZAR	A	15.00	31 Jul 2024
KZIN0000031	6065001000	Sell Off Customer	Sales	N	New	5,313.00	ZAR	A	15.00	31 Jul 2024
KZIN0000032	6065001000	Sell Off Customer	Sales	N	New	4,830.00	ZAR	A	15.00	31 Jul 2024
KZIN0000033	6075468708	MHRA Burhill CC	Sales	N	New	4,830.00	ZAR	A	15.00	31 Jul 2024
KZIN0000037	6065001001	Cash Sale Account	Sales	N	New	5,313.00	ZAR	A	15.00	31 Jul 2024
KZIN0000038	6065001000	Sell Off Customer	Sales	N	New	4,830.00	ZAR	A	15.00	31 Jul 2024

Related Topics



- [Sales POS Lite - Introduction](#)
- [Sales POS Lite - Add POS Invoice](#)
- [Sales POS Lite - Print the Invoice](#)

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