

WMS: Did You Know?

From Professor Merlot



How to Go To a Specific Invoice quickly?

The Invoice is the primary Point Of Sale tool in WMS for you and your customer. Assuming you have a specific Invoice to check, there are a number of ways to find that Invoice number:

Here's how:

1. Main Switchboard -> Sales Switchboard -> Invoice (or press function key, **F7**)

The screenshot shows the WMS2000 Invoice form. The 'Invoice Number' field is highlighted with a mouse cursor. The form includes fields for 'Sold To', 'Invoice Date', 'Make Date', 'Salesperson', 'Invoice Number', 'Retail Only', 'Refund', 'Locked', and 'Show Counts'. A table at the bottom shows product details for 'Gewurztraminer Cellar Clas'.

- Double click with your mouse in the **Invoice Number** field.
- Enter the number in the **Find What** field on the **Find in Field 'Invoice Number'** pop up. In this case we enter **20**.
- Press the **ENTER** key or **Find First** button.
- Press the **Close** button to get back to the **Invoice** form and the Invoice will have moved to Invoice number **20**.

The screenshot shows the 'Find in field: Invoice Number' dialog box. The 'Find What' field is empty. The 'Search' dropdown is set to 'All', and the 'Match' dropdown is set to 'Whole Field'. The 'Search Only Current Field' checkbox is checked.

The screenshot shows the 'Find in field: Invoice Number' dialog box. The 'Find What' field now contains the number '20'. The other settings remain the same.

The screenshot shows the WMS2000 Invoice form. The 'Invoice Number' field now contains the number '20'. The form is the same as in the first screenshot, but the focus is now on the 'Invoice Number' field.

On each of the three tabs, **Invoice**, **Customer Info & Comments** and **Verify in Production**, there is a **Invoice Number** field, use this procedure on any of them.



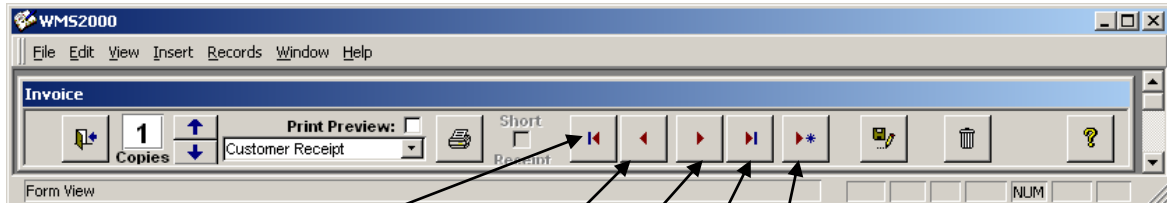
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- When the invoice is opened, it always goes to the last entry.
 - It is easy to move by each Invoice by clicking on any of the arrow buttons at the bottom middle of the Invoice form.



- Go to **1st Invoice**
 - Go to **Previous Invoice**
 - Go to **Next Invoice**
 - Go to **Last Invoice**
 - Create a **New Invoice**

- Although not as direct, an Invoice number can be found using the function key, **F8** – the **Customer Find** form if you know the name of the customer.
- Similarly, the function key, **Crtl-F7** – the **Customer Find by Phone** also will show you the Invoice numbers if you know the customer's phone number in WMS.

