

3- Edit

Code	Description	Qty	Price	Ext Price
Grand Summaries				
				Sum = 193.50
1417	1417 test to break to 1417-i	2.00	22.500	45.00000
BC294	Knuckle Bandages, Med	1.00	8.500	8.50000
BC297	Knuckle Bandages, 1000/Box	1.00	140.000	140.00000

The complete list of invoiced items (and checklist items) can be found in the ALL Items tab for review. Can review the Qty Ret, Qty Del (Qty), Price, Line Item Notes

NOTE: Things can be added or edited in their individual tabs

- Rentals
- Products
- Labor
- Checklist

4- Rentals

Code	Description	Qty Del	Qty Ret	Price	ExtPrice
Grand Summaries					
					Sum = 50.00
CO2-S	Small CO2 Tank	2.00	2.00	25.000	50.00000

In the rentals Tab, Double Click to open an existing or click ADD NEW to add an item

0: Sales Invoice Rental

Record View Save Settings ? Help Form Settings

Product: CO2-L Large CO2 Tank

Qty Returned: 1 Qty Delivered: 1

Price: 19.95 Retail Price

Taxable: 0

Notes:

Select the product from the drop down,
 Fill in Qty Returned
 Fill in Qty Delivered
 Fill in Price
 Set Taxable 0/1 (1 = YES, 0 = Not Taxable)

Set qty Ret & Qty Del to 0 and Check INACTIVE to delete

F9 = Save and Close

For more details visit
www.LongwellTech/tta



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Trakker Quick Start Invoice Review For Rental Services



Longwell Technologies, Inc.

www.LongwellTech.com

1– Open Orders

If invoices are set to REVIEW mode, they will be the Orders section.

These can be changed before they are emailed to the customer

If they were completed on a mobile device they will have:

- Invoice #
- In Review Checkbox

A screenshot of the software interface showing the 'In Review' checkbox selected. The 'Invoice #' field is highlighted with a red circle and contains the value '100008'. Other fields include 'Ord #', 'Cust PO# testPO1', 'Sub Total 124.95', 'Discount 0.00', 'After 124.950', 'Tax 0.00', and 'Low Tax 0.00'.

2– Review

Review notes
Office Notes: For office use only
You can make changes

A screenshot of the 'Office Note' field in the software interface. The note text reads: 'Was super easy' and 'Checked all system. In good working order.' The field is titled 'Office Note Location' and includes a 'Bill To' section.

5– Products & Labor

Use the Products and Labor tabs to add or edit items much like Rentals

But there is no RETURN qty and additional notes fields (not displayed on invoice)

6– Calculate Totals

If there are any RED Boxes
Click Re-Calc Totals
Also make sure Qty of Items totals match, if not, then change the one in RED to match the BLUE

Sub Total	193.50	Type
Discount	0.00	Tax
After	193.500	Low
Tax	0.00	Low
Low Tax	0.00	Temp
Grand Total	193.50	Temp
Qty of Item	4.000	Qty of

ReCalc Totals (highlighted in red)

7– Preview Invoice

Record->Print Preview (Single)
Select Invoice format to Preview

A screenshot of the 'Orders' window showing the 'Print Preview (Single)' menu option selected. The menu is open, showing options like 'Save', 'Print All', 'Print Preview (All)', and 'Print Preview (Single)'. The 'Print Preview (Single)' option is highlighted, and a sub-menu is visible with 'Longwell Retail Invoice' and 'Retail Invoice Pull List (Simple)' options.

8– Finish

1– Select the Invoice Format this invoice should email (if not the default one)

A screenshot of the 'Invoice' dropdown menu in the software interface. The menu is open, showing options like 'ReportName', 'Description', 'cust_RetailInvoice.rpt', and 'Default.xrp'. The 'Invoice' dropdown is highlighted in yellow.

2– Look at the AutoInv email address just below the Invoice drop down. If needed, click OPEN next to the customer to change any customer data including the Auto Invoice Email address

3– Uncheck the In Review Checkbox
F9– Save & Close
Refresh Grid. This Order will be gone (now in the Invoice tab)

9– Clean Up

If Rentals were changed, added or removed, will need to adjust the quantities in the Customer Rental Tabs

If Rentals or products were added or Quantities changed will need to adjust the Mobile/HH inventories for these items