

5 Year Surcharge for Customer Owned Cylinders



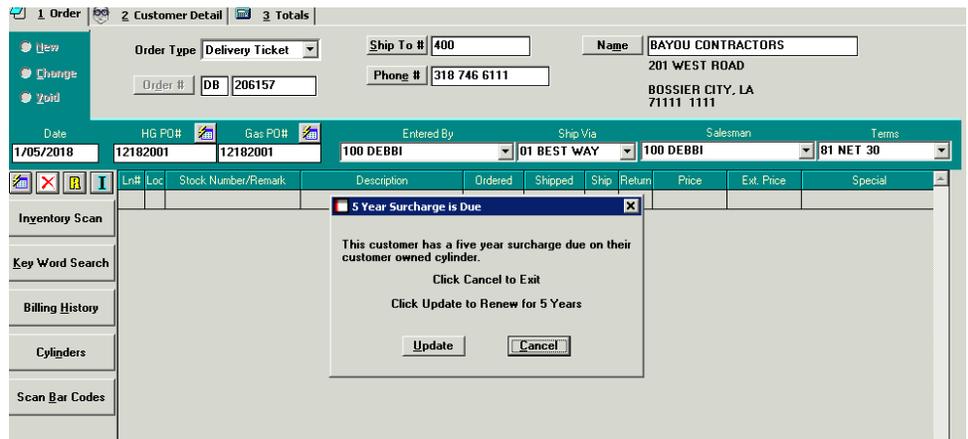
Introduction

A feature was added to Order Entry that will prompt the operator to enter a five year surcharge for customer owned cylinders. Order Entry will alert the operator and they can determine whether or not to issue a 5 year surcharge invoice. This pop-up will appear if the customer has a zero amount invoice on their account that is over five years.

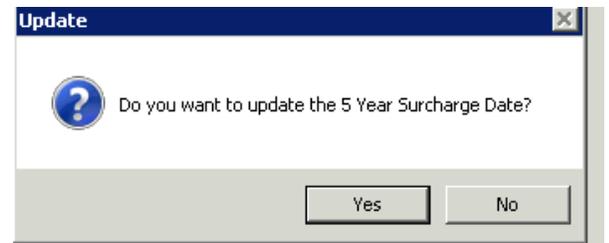
Note: there are setup config entries required. The Support Representative can enter this variable if the surcharge pop-up is to be used. There is also a variable to determine which alpha prefix is used for these surcharge invoices. The Accounts Receivable End of Month update will not delete any invoices with this alpha prefix and a zero amount.

First setup an inventory item (**5 YEAR SC**) with a description of **Five Year Surcharge**. Do not enter a selling price or cost if the surcharge amount fluctuates for each customer, the operator can enter the amount on the ticket. If it is a standard surcharge amount, the price can be entered on the inventory item. The item can be setup as tax exempt if it should not be taxed and the correct General Ledger Control Number should be used to update the appropriate GL accounts.

This is an example of the pop-up message:



If the update button is selected it will prompt the user to answer Yes to update or No to cancel.



If the Update button is selected, then the date will be changed to the current date on the zero amount invoice. The same message would pop up again in five years. If the cancel button is selected, then it will not update the zero invoice's date.

The date was changed on this invoice:

Invoice	Type	Check	Date	Amount	Unpaid	Aging	Purchase Order
DB 205992	Invoice		5/03/2017	163.03	40.10	247	12182001
DB 205992	Payment	829784	8/02/2017	122.93-	.00	156	
DB 206000	Invoice		5/05/2017	47.50	47.50	245	12182001
DB 206016	Invoice		5/10/2017	62.31	62.31	240	12182001
DB 206023	Invoice		7/31/2017	486.15	486.15	158	12182001
DB 206007	Invoice		8/01/2017	96.78	96.78	157	12182001
DB 206053	Unapplied Credit Memo		8/08/2017	245.75-	245.75-	150	12182001
DB 206085	Invoice		10/11/2017	62.31	62.31	86	12182001
DB 206086	Invoice		10/30/2017	5.35	5.35	67	12182001
DB 206059	Invoice		11/06/2017	63.85	63.85	60	12182001
DB 206060	Invoice		11/06/2017	48.88	48.88	60	12182001
DB 206061	Invoice		11/06/2017	154.45	154.45	60	12182001
DB 206073	Invoice		11/06/2017	63.25	63.25	60	12182001
DB 206093	Invoice		11/24/2017	47.50	47.50	42	12182001
DB 206117	Invoice		12/13/2017	26.45	26.45	23	12182001
DB 206119	Invoice		12/13/2017	16.88	16.88	23	12182001
DB 206100	Invoice		1/03/2018	47.50	47.50	2	12182001
DB 206102	Invoice		1/03/2018	47.50	47.50	2	12182001
DB 206115	Invoice		1/03/2018		.00	2	12182001
DB 206116	Invoice		1/03/2018	31.45	31.45	2	12182001
DB 206132	Invoice		1/03/2018		.00	2	12182001
DB 20110101	Invoice		1/05/2018		.00		

This is an example of a ticket:

The surcharge can be entered with the correct amount and the customer will be billed.

Once the invoices have been updated, the operator will be able to use this part number (5 YR SC) to search billing history and/or the Investigator to see which customers have been charged this particular surcharge.

Order Type: Delivery Ticket | Ship To #: 400 | Name: BAYOU CONTRACTORS
 Order #: DB 206161 | Phone #: 318 746 6111 | 201 WEST ROAD, BOSSIER CITY, LA 71111 1111

Date: 1/05/2018 | HG PDH: 12182001 | Gas PDH: 12182001 | Entered By: 100 DEBBI | Ship Via: 01 BEST WAY | Salesman: 100 DEBBI | Terms: 81 NET 30

Ln#	Loc	Stock Number/Remark	Description	Ordered	Shipped	Ship	Return	Price	Ext. Price	Special
1	1	5 YR SC	5 YR SURCHARGE C/O CYL	1.00	1.00			60.0000	60.00	

Additional Information for Customer Item: Available 1.00-

Sub-Total: 60.00 | Delivery Charges: | Surcharges: | Sales Tax: | TOTAL: \$60.00

Buttons: Cancel Order, Print Order, Complete Order

Have questions? Feel free to [send us an email](#), we welcome the questions!

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