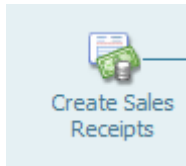


## HOW TO CUSTOMIZE THE SALES RECEIPT

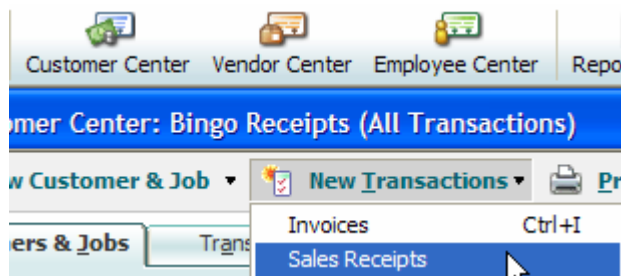
You can modify the “**Sales Receipt**” so that you only have the items on the screen that you want or need to populate. In other words you can get rid of unwanted fields on the screen. You can also modify it to change the way it looks so that you can receipt things against numerous classes instead of just one.

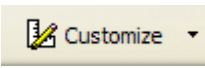
To find the “**Enter Sales Receipt**” screen you can go to the QBs Home Page and select

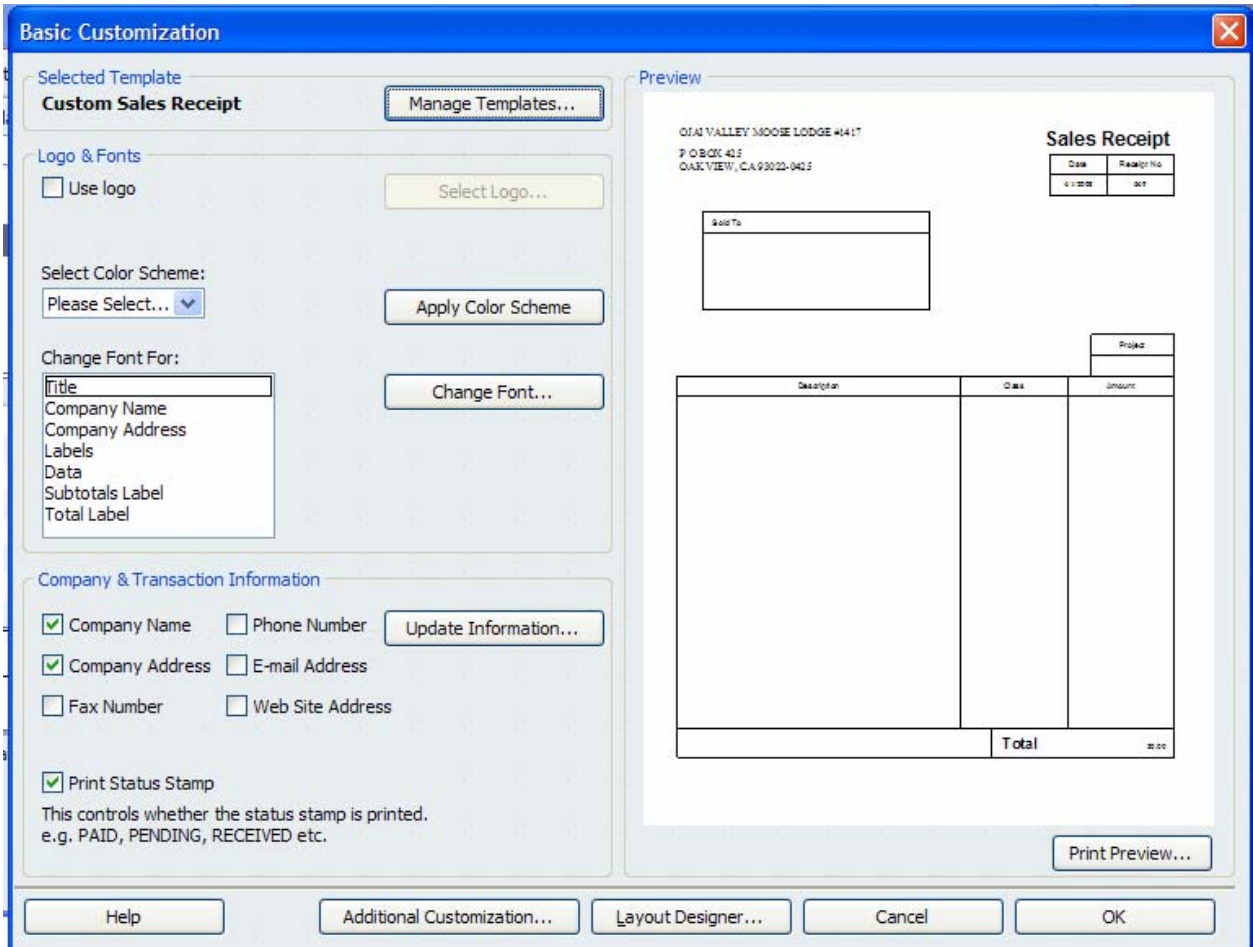


the “**Create Sales Receipts**” Icon.

Another option is to use the “**Customer Center**”. Go to the “**Customer Center**” by selecting it from the QBs Main Page and then select “**New Transactions**”, “**Sales Receipts**”.



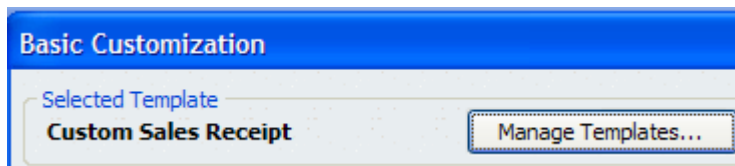
Go to the  **Customize** Icon in the upper right hand corner of the “**Enter Sales Receipts**” screen. This will cause the “**Basic Customization**” screen to appear.



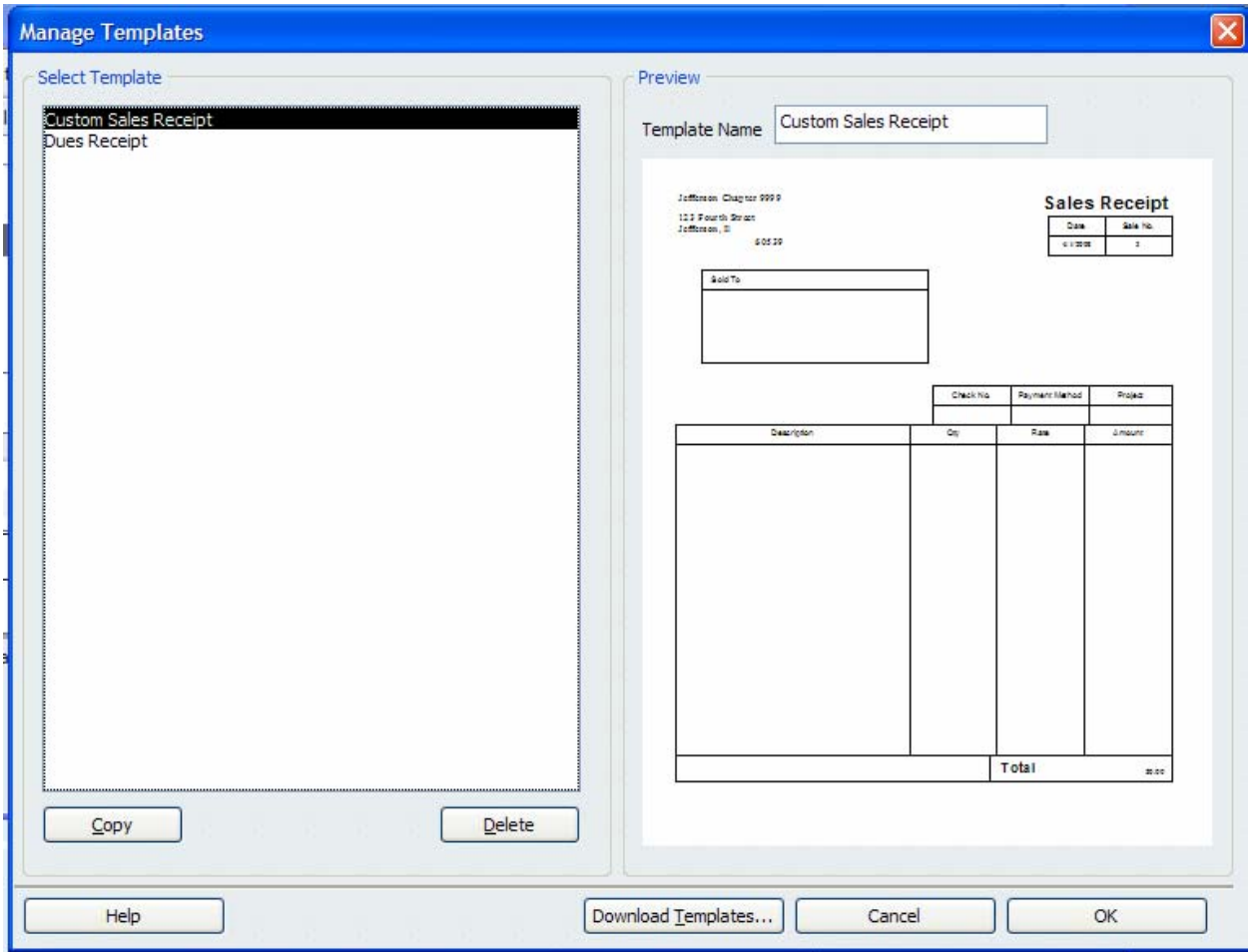
This screen allows the user to change the “**Custom Sales Receipt**” template that appears when you select the “**Create Sales Receipt**” icon from the QBs Main Page; or when using the “**Customer Center**”, selecting “**New Transaction**” and then “**Sales Receipts**”; to be configured any way that they desire. It can also be used to create a new template, to delete an existing one or to make a template inactive so that it can no longer be used.

For instance since we are no longer using the “**Dues Receipt**” to create temporary cards since they are available from the Catalog Sales Department at Moose International we could delete this template or make it inactive using the following instructions.

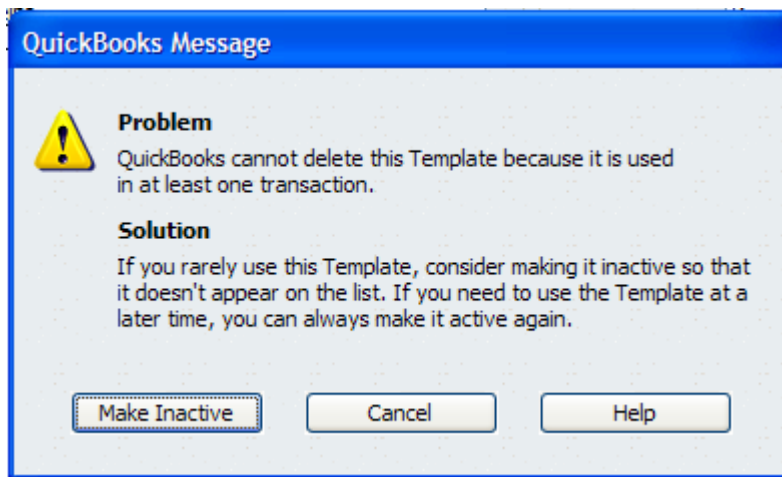
Click on the “**Manage Templates**” button in the screen.



This will cause the “**Manage Templates**” screen to appear.

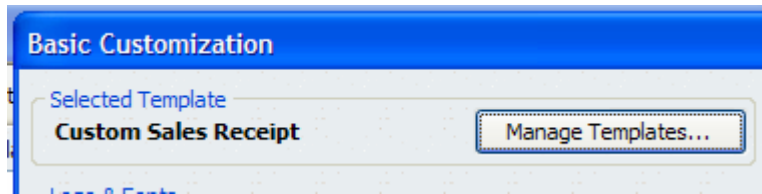


Notice that you can click on a template and click the “**Delete**” button in the bottom of the screen and the template will be deleted. However, if the template has been used for any transactions a warning message will appear.



While you may not be able to delete it because it has been used for some transactions, notice that there is a “**Make Inactive**” button that allows you to make this template

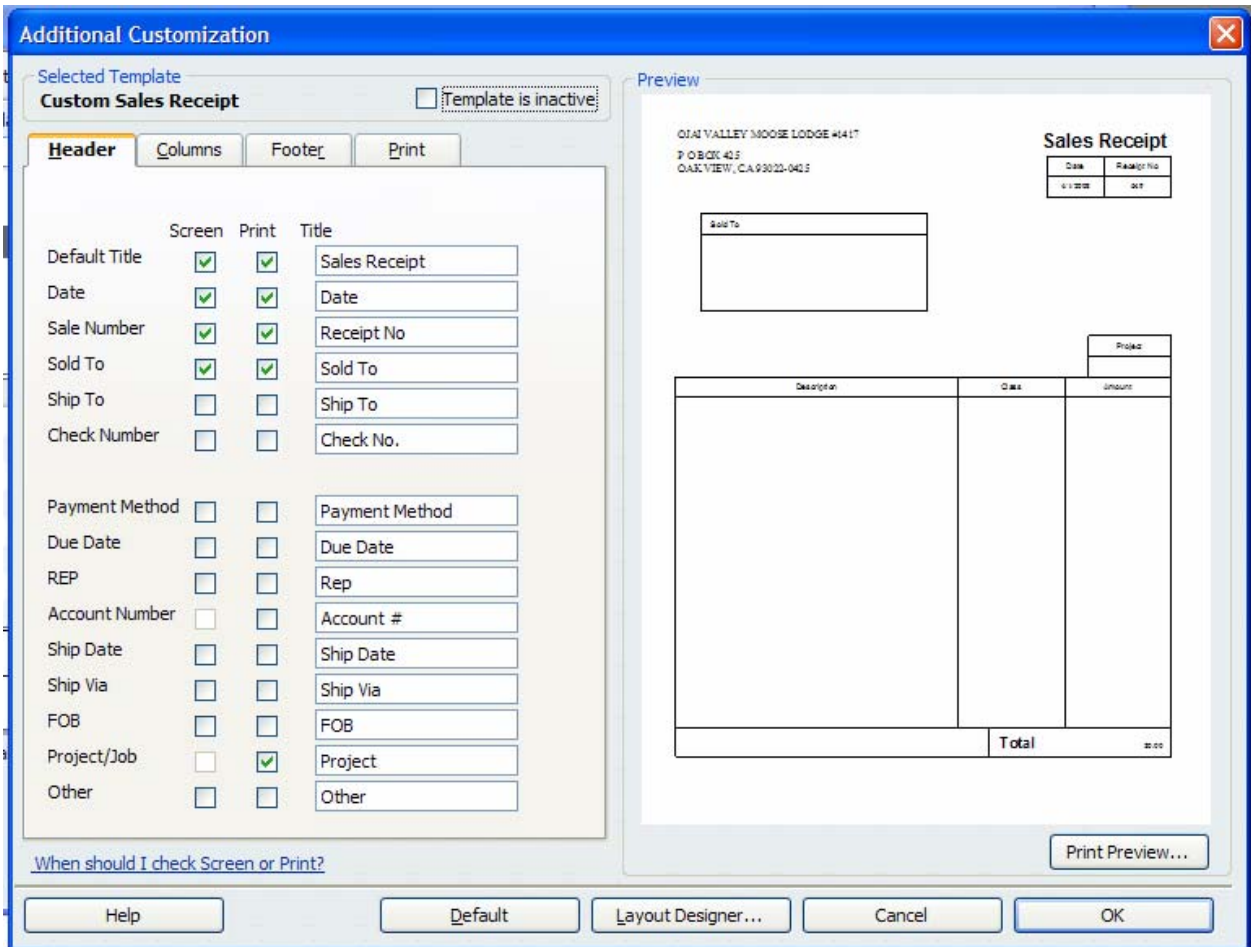
inactive. This could prove useful in preventing a user from using a template that they should not. After you have made it inactive click “**OK**” to close the screen and return to the “**Basic Customization**” screen.



Make sure that you are on the template that you would like to change. This is done by looking in the top of the screen to see which template is selected. This example shows that the “**Custom Sales Receipt**” has been selected.

There are options on this screen for changing how the template is displayed within the screen. For example I can change the color scheme, change the font, and even change the information that is displayed in the **Company & Transaction Information** portion of the **Sales Receipt**.

I can also select the “**Additional Customization...**” button and make some additional changes to the “**Custom Sales Receipt**”.



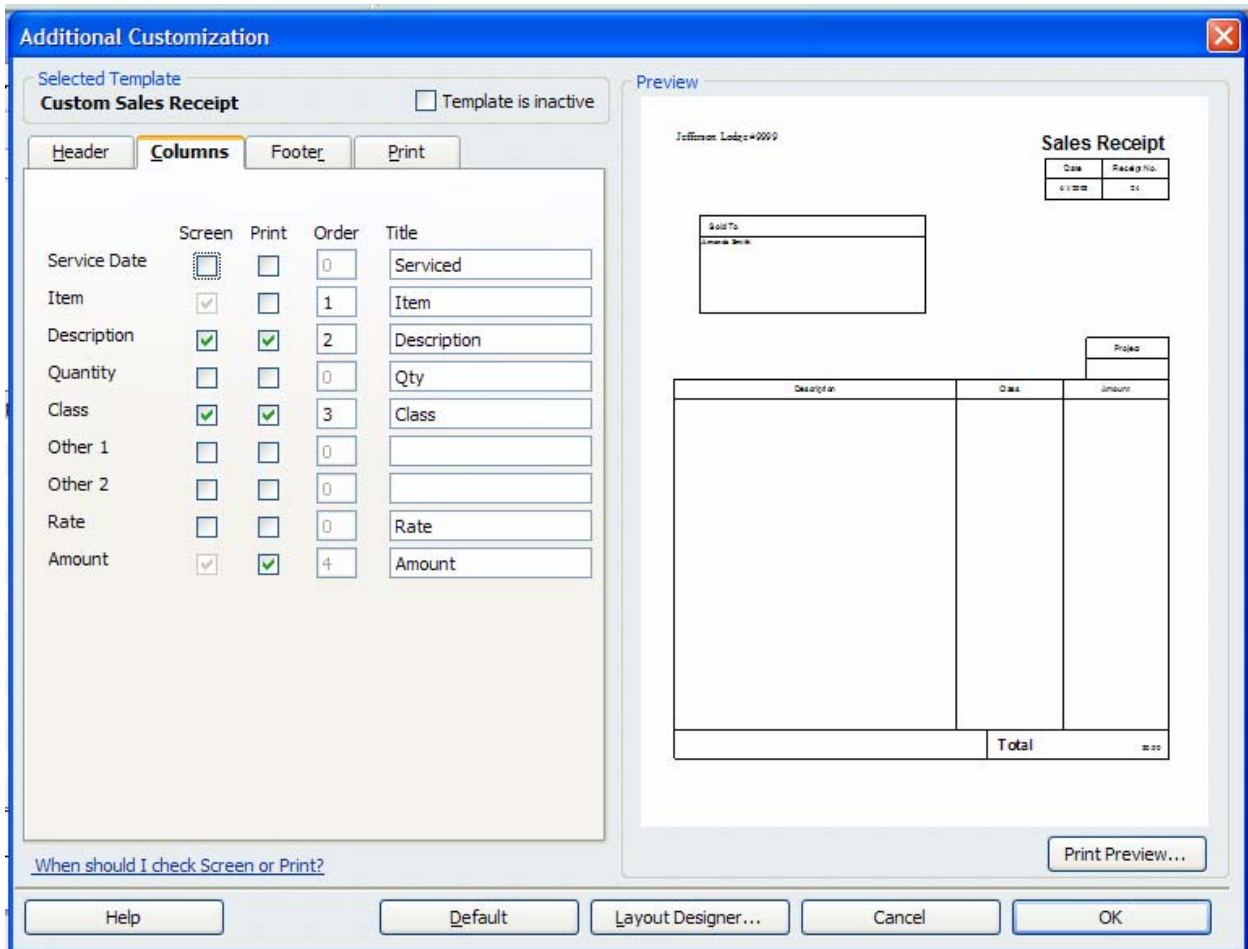
Notice that I can see what the sales receipt is going to look like as I make the changes since there is a “**Preview**” on the right hand side of the screen.

There are 4 tabs in the screen that will allow me to change the “**Header**”, “**Columns**”, “**Footer**” and “**Print**” features of the **Sales Receipt**.

You can click within the boxes to remove the things that you do not want to see within each individual tab. You can also change the title in a field by entering a new title within the box.

Notice that there is a box that determines if the item will appear in the **Screen** or if it will **Print** when the Sales Receipt is printed.

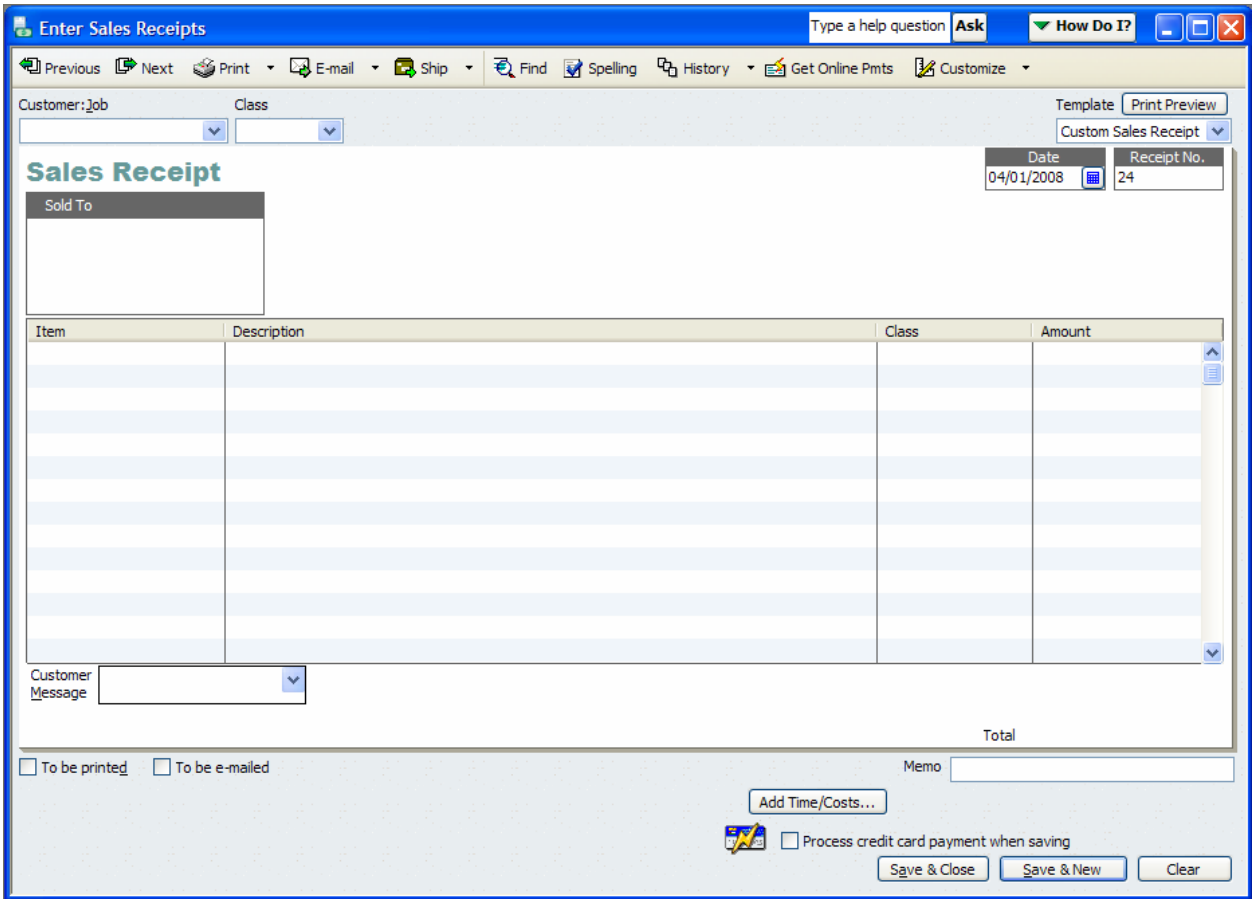





In this example in the “**Columns**” tab I removed some fields that it is not necessary to populate such as the “**Quantity**” and “**Rate**”. I also put a checkmark in the “**Class**” fields so that they would display in the bottom portion of the screen and printed when I print a **Sales Receipt**. This allows me to have more than one class on a single sales receipt. (i.e., Lodge, Social Quarters, Kitchen for the lodge and for the Chapters more than one committee can be shown on a single receipt)

When you have completed making changes to the template you can click the “**OK**” button and save the changes you have made to the template.

Notice that the “**Enter Sales Receipt**” screen is so much easier to populate because unnecessary fields have been removed.



This is a great way to simplify the **Sales Receipt** so that it makes more sense to the individual user.

So how do I find out if there is more than one template in the “**Enter Sales Receipt**” screen? Click on the drop down  next to the “**Custom Sales Receipt**” or “**Dues Receipt**” in the upper right hand corner of the “**Enter Sales Receipts**” screen and notice that there is more than one template.

