Store Account Management Tools

USER GUIDE

System Solutions, llc

Description:

Do your customers require detailed evidence of their purchases at your business? Do your customers have multiple employees, departments or projects that need purchase tracking? Are you spending time preparing documentation for your customers just so you can get paid?

The Store Account Management Tools extension captures electronic signatures, buyer contact, and purchase order number at time of the Business Central Invoice or Credit Memo creation. Retrieve or print captured information on Invoice(s) and Credit Memo(s). Set up house accounts, track credit, and generate an enhanced customer statement.

Signature Setup:

Setup needs to be completed for any user that may sell sales invoices or sales orders. If the Business Central user is used by multiple PCs and does not have a signature capture device connected to it, it is suggested to configure the signatures to not be mandatory.

- In Business Central, search "User Setup" and open the page.
- Select or Add a User ID.
- To prompt the Store Account Management Tools page, including signature, after an open sales invoice or credit memo is posted, check "Prompt SAMT Form."
- To prompt the signature page after a sales order is released, check "Prompt Sales Order Signature."
- Input the height and width of the desired signature window in pixels. For example: height of 100, width of 500.
- In the Signature Required field, "No" allows the page to be closed, "Reminder Only" allows the page to be closed but will ask the user if they want to skip signing, and "Signature Mandatory" will not close the page until a signature is saved.
- In the Device field, select Topaz or Verifone. Verifone devices require additional setup. Other devices may also be supported. Please contact sales with the email or phone number at the bottom of this user guide.

Report Layout Setup:

If you'd like to show the captured signature on the printed sales invoices, you can use the custom report layouts that come with Store Account Management Tools:
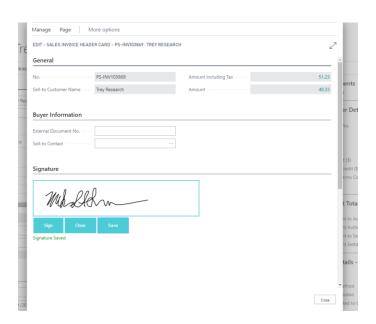
- Search and open the page called "Report Selection – Sales."
- Select "Invoice" in the Usage dropdown and change the report to Report ID 70371836.

- Select "Credit Memo" in the Usage dropdown and change the report to Report ID 70371837.

If you'd like to add the captured signature to the Sales Order confirmation report, a new field will be made available to it called SignatureBlobSySo which can be added to the Word layout as a picture.

Operation:

- Make sure your signature pad is properly connected and the logged in user is configured in the user setup page as explained above.
- Create a Sales Invoice or Sales Order as usual.
- If the user has "Prompt Sales Order Signature" enabled, a signature page will open when manually releasing the order.
- If the user has "Prompt SAMT Form" enabled, the full Store Account Management Tools page, including signature, will open.
  - o External document (Optional)
  - o Sell to Contact (Optional)
  - o Signature (Optional or mandatory depending on your preferences)
  - o If a signature was already accepted from a released order, it will not need to be signed again.
- Click the Sign button to get a signature.
- Capture the customer's signature using the signature pad.
- Click Save.

- Click Close on the page and the sale will complete as usual.
- To see the signature on a Posted Sales Invoice or Posted Sales Credit Memo, go to Process > Show Signature.
- To see the signature on a released Sales Order, go to Process > Show Signature.
- To Print an invoice with the signature, select Print/Send > Print. The Store Account Management Tools invoice report layout must be used for the image to be printed with the invoice.

Run Customer Statement:

- Search and select "SAMT Customer Statement."
- Add dates for the report.
- Select Filters and options as necessary.
- You can Send, Print or Preview the report when finished.

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Contact Us:

- **Email:** sales@syssolutionsllc.com
- **Phone:** (888) 816-8002
- **Web:** https://www.syssolutionsllc.com/