

PrintSmith Vision Technology & Training Virtual Workshops

Question & Answers: *Webinar 5, Creating & Managing Invoices*

Q. ***Can I delete an account that has a balance?***

A. No, a customer that has a balance, open estimate, or invoice cannot be deleted.

Q. ***Does the discount show on the invoice?***

A. You have the option to show or hide a customer discount in the body tab in Document Preferences.

Q. ***Account notes is very limited in number of characters allowed. Is there a means to change how much content can be entered in Notes?***

A. The account notes has a specified number of characters. It cannot be changed by users.

Q. ***Why not just force the formatting so everything is upper case and the phone numbers are always in the same format?***

A. Most customers use upper and lower case for names and addresses and would not want to be forced to upper case only. Phone numbers change based on country so we cannot limit them to the US standard.

Q. ***Can we give our sales reps access to Account but not allow them to edit data fields like credit limit?***

A. You can keep users from selected tabs in the Accounts window but if they have access to the field, they will be able to edit it.

Q. ***Is it possible to delete multiple accounts and contacts at one time?***

A. Yes, in Fast Track you can select multiple items and delete them at the same time.

Q. ***Do you recommend moving inactive accounts to prospects rather than deleting them?***

A. I would recommend you only delete accounts if there is no longer the possibility of getting future business. Moving them to prospects allows you the ability to market to them and retain their history.

Q. ***Would there be a lot of differences between an in-plant vs for-profit business?***

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- A. The setup would be very similar. Typically, the main difference is the amount of markup added to definitions and charges. You would still want to account for all processes needed to produce the final products.

- Q. ***How do you change the secondary email to say Other?***

- A. You will find it under the Table Editor>Phone Tags.