




HOW TO SAVE AND UNDO RECORDS IN BILLING REGISTER?



→ Records are saved in Billing Register automatically. Users need not save a record manually. Users can just click on another record or field to ensure the record is saved.

→ Active record (the record which is being edited) can be undone by pressing Escape key (ESC) on the keyboard.

Let's see a practical example in Billing Register to understand this concept better.

CUSTOMERS

Convert To LeadCreate Sale

Customer Name

ID

Chirag Kumar	CK1
Neelam Sahni	NS1
Sanjay Modi	SM1
Test Customer	TC1

Basic Information

Sub Contacts

Events

Misc.

Opportunities

Sales

Receipts

Send Message

Type: IndividualID: NS1Active: ☒

Customer Name: Neelam Sahni

Short Name:

Gender: Female

Occupation:

Organization

Designation

Comments:

Photo: Drag File Here

Upload

Export

Default Sale Type

Default Currency: INR

1. ☐ Quantity Pricing

2. ☐ General Discounting

3. ☐ Specific Discounting (%)

Accounting Ledger

CL

Set

Mailing Addresses:

Location Type

Address

Shipping

DELETE

Communication Details (Phone/Email ID):

Customer Groups:

Type	Contact Number / ID	Sub Contact Name	Active	DND	Comments	Default	Linked With
Phone	985-503-6875		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
*			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

Group Name

Record: 2 of 4

No Filter

Search

Search

All

Start Text

End Text

Let's say we want to add some information (Organization Name) for this customer.

CUSTOMERS

Convert To LeadCreate Sale

Customer NameID

Chirag KumarCK1

Neelam SahniNS1

Sanjay ModiSM1

Test CustomerTC1

Basic InformationSub ContactsEventsMisc. OpportunitiesSalesReceipts

Type:IndividualID: NS1Active: ☒

Customer Name:Neelam Sahni

Short Name:

Gender:Female

Occupation:

OrganizationKMPD Ltd.

Designation

Comments:

Photo:Drag File Here

UploadExport

Default Sale Type

Default Currency:INR

1. ☐ Quantity Pricing

2. ☐ General Discounting

3. ☐ Specific Discounting (%)

CLSet

Mailing Addresses:

Location TypeAddress

defaultBillingShipping

☐☒☒

DELETE

Communication Details (Phone/Email ID):

Type	Contact Number / ID	Sub Contact Name	Active	DND	Comments	Default	Linked With
Phone	985-503-6875		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	
*			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

Customer Groups:

Group Name

Record: 2 of 4No FilterSearch

SearchAllStart TextEnd Text

Typed KMPD Ltd. as the Organization. Now, to save this record just click on any other field/record. We want to go for Comments next, so let's click on the Comments box.

CUSTOMERS

Convert To LeadCreate Sale

Customer Name

ID

Neelam Sahni

NS1

Sanjay Modi

SM1

Basic Information

Sub Contacts

Events

Misc.

Opportunities

Sales

Receipts

Type: Individual

ID: NS1

Active: ☒

Customer Name: Neelam Sahni

Short Name:

Gender: Female

Occupation:

Organization: KMPD Ltd.

Designation:

Comments:

Photo:

Drag File Here

Upload

Export

Default Sale Type

Default Currency: INR

1. ☐ Quantity Pricing

2. ☐ General Discounting

3. ☐ Specific Discounting (%)

Accounting Ledger

CL

Set

Mailing Address

City

State

Default

Billing

Shipping

DELETE

Communication Details (Phone/Email ID's):

Customer Groups:

Type

Contact Number / ID

Sub Contact Name

Active

DND

Comments

Default

Linked With

Phone

985-503-6875

☒

☐

☒

*

☐

☐

☐

Group Name

*

Record: 1 of 2

No Filter

Search

Search

All

Start Text

End Text

KMPD Ltd.
is saved now.
It is that simple!

Customer Name

ID

Chirag Kumar

CK1

Neelam Sahni

NS1

Sanjay Modi

SM1

Test Customer

TC1

Record: 2 of 4

No Filter

Search

All

Start Text

End Text

Basic Information

Sub Contacts

Events

Misc.

Opportunities

Sales

Receipts

Type: Individual

ID: NS1

Active: ☒

Customer Name: Neelam Sahni

Short Name:

Gender: Female

Occupation:

Organization: KMPD Ltd.

Designation:

Comments: Interested in home delivery

Photo: Drag File Here

Upload

Export

Default Sale Type

Default Currency: INR

1. ☐ Quantity Pricing

2. ☐ General Discounting

3. ☐ Specific Discounting (%)

Mailing Addresses:

Location Type

Address

City

Communication Details (Phone/Email ID):

Type

Contact Number / ID

Sub Contact Name

Active

DND

Comments

Default

Linked With

Customer Groups:

Group Name

CURSOR

Now we entered a comment for this customer. But, for some reason, we decided not to save the comment. Then, we just need to press the Escape key on the keyboard while the cursor is in the field.

CUSTOMERS

Convert To Lead

Create Sale

Customer Name	ID
Chirag Kumar	CK1
Neelam Sahni	NS1
Sanjay Modi	SM1
Test Customer	TC1

Basic InformationSub ContactsEventsMisc. OpportunitiesSalesReceipts

Send Message

Type: IndividualID: NS1Active: ☒

Customer Name: Neelam Sahni

Short Name:

Gender: Female

Occupation:

Organization: KMPD Ltd.

Designation:

Comments:

Photo: Drag File Here

UploadExport

Default Sale Type

Default Currency: INR

1. ☐ Quantity Pricing

2. ☐ General Discounting

3. ☐ Specific Discounting (%)

Accounting LedgerCLSet

And the comment got undone/deleted.

Mailing Addresses:		City	State	Default	Billing	Shipping	
Location Type				<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	DELETE

Communication Details (Phone/Email ID) :								Customer Groups:	
Type	Contact Number / ID	Sub Contact Name	Active	DND	Comments	Default	> Linked With ^	Group Name	
Phone	985-503-6875		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>			
*			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>			

Date

Sr. No.

Customer

03-02-2023

1

Basic Details

Miscellaneous

^ Sale No:

2022-23/1

SB

Sec:

WKIN

Date:

03-02-2023

Sale Type:

Local Cash Sale to Consumer

Customer

Choose Customer

C+

^ID:

Assign

Clear

^ADD RESS

Phone:

Name :

City

State

Local (Intra-State)

Cash

^ Status >

Initiated

Sale To Registered Dealer

POS For Tax

Billing Address

Apply Discount

Item No.	>Selling Qty.^	Selling Unit	^ Unit List Price	Unit Extra Charge	Discount %	Unit Discount	Unit Sale Price	Gross Price	Gross Discount	Sale Price	^ Tax Amount	Net Price
1	1	Pc	100.00 /Pc	20.00 /Pc	0	0.00	120.00	120.00	0.00	120.00	0.00	120.00
^Item McMohan's Pizza - Large - Ready to Eat			With Mushroom		W/O Chilly Flakes		^ I-Note		Misc		^ Status Initiated	

Now, let's see a scenario where you are allowed to only select a value from a list of values.

If you enter some other value, the system won't allow to enter the value and would seem to force you to select a value from the list. You can escape from this by pressing **Escape** key on the keyboard.

Let's see an example here - This is the *Sales* form. Let's try to enter a *Sale Type* which is not in the list of *Sales Types*.

Delete Item

Selected

All

Quantity

1

Item Order

1

Items

With-Without

Additional Charges

Load Items From SO

Search Item Here

Scan Barcode Here

Main Category	Items	Internal Code	List Price	Tax
Bakery	Fruit Bun		10	
	McMohan's Pizza - Large - Ready to Eat		100	
	McMohan's Pizza - Medium - Ready to Eat		70	
	McMohan's Pizza - Small - Ready to Eat		50	
	Pizza Base - Large	PB-L	50	
	Pizza Base - Medium		40	

Gross Price(Incl.)	120.00
Discount % :	0
Discount :	0.00
Sale Price(Incl.)	120.00
Addl. Chrgs(Incl.)	0.00
^ Tax Amount :	0.00
Net Price :	120.00
^ Round Off :	0.00
Receivable Amt:	120.00
^ Change Paid :	0.00
Amt Balance :	120.00

^ Current Credit Balance

0.00

Pay/Take Balance

Received IN

^ Amount

Cash

0.00

*

0.00

Amt Received

0.00

Clear

Print Set

Two Copies

Copy

All

Invoice

Size

A4 Portrait

Invoice

Sale Slip

1L 80(70) mm

Print All

Print/Send PDF

X

Please note that there isn't any Sale Type named as "Normal Sale" here. We will enter it as the Sale Type and try to save it.

And this is the popup message we get right after trying to save the record.

Dashboard

Sales

Date

Sr. No.

Customer

03-02-2023

1

Basic Details

Miscellaneous

^ Sale No:

2022-23/1

SB

Sec:

WKIN

Date:

03-02-2023

Sale Type:

Normal Sale

Customer

Choose Customer

C+

^ID:

Assign

^ADD

RESS

Phone:

Name:

Clear

City

State

Local (Intra-State)

Cash

^ Status >

Initiated

Sale To Registered Dealer

POS For Tax

Billing Address

Apply

Discount

Item No.	>Selling Qty.^	Selling Unit	^ Unit List Price	Unit Extra Charge	Discount %	Unit Discount	Unit Sale Price	Gross Price	Gross Discount	Sale Price	^ Tax Amount	Net Price
1	1	Pc	100.00	/Pc	20.00	/Pc	0	0.00	120.00	120.00	0.00	120.00
^Item McMohan's Pizza - Large - Ready to Eat												
With Mushroom												
W/O Chilly Flakes												
^ I-Note												
Misc ^ Status Initiated												

There are a few ways to escape this situation but the easiest one is to just press the Escape key on the keyboard while the cursor is in the field.

Delete Item

Selected

All

Quantity

1

Item Order

1

Items

With-Without

Additional Charges

Load Items From SO

Search Item Here

Scan Barcode Here

Main Category	Items	Internal Code	List Price	Tax
Bakery	Fruit Bun		10	
	McMohan's Pizza - Large - Ready to Eat		100	
	McMohan's Pizza - Medium - Ready to Eat		70	
	McMohan's Pizza - Small - Ready to Eat		50	
	Pizza Base - Large	PB-L	50	
	Pizza Base - Medium		40	

Gross Price(Incl.)

120.00

Discount % :

0

Discount :

0.00

Sale Price(Incl.)

120.00

Addl. Chrgs(Incl.)

0.00

^ Tax Amount :

0.00

Net Price :

120.00

^ Round Off :

0.00

Receivable Amt:

120.00

^ Change Paid :

0.00

Amt Balance :

120.00

^ Current Credit Balance

0.00

Pay/Take Balance

Received IN

^ Amount

Cash

0.00

*

0.00

Amt Received

0.00

Clear

Print Set

Two Copies

Copy

All

Invoice

Size

A4 Portrait

Invoice

Sale Slip

1L 80(70) mm

Print All

Print/Send PDF

DashboardSales

Date03-02-2023Sr. No.1Customer

Basic DetailsMiscellaneous

^ Sale No:2022-23/1SBSec:WKINDate:03-02-2023Sale Type:Local Cash Sale to Consumer

CustomerChoose CustomerC+^ID:AssignClear^ADDRESS

Phone:Name:CityStateBilling AddressApply Discount

Local (Intra-State)Cash^ Status >Initiated

Sale To Registered Dealer

POS For Tax

Item No.	>Selling Qty.^	Selling Unit	^ Unit List Price	Unit Extra Charge	Discount %	Unit Discount	Unit Sale Price	Gross Price	Gross Discount	Sale Price	^ Tax Amount	Net Price
1	1	Pc	100.00 /Pc	20.00 /Pc	0	0.00	120.00	120.00	0.00	120.00	0.00	120.00
^Item McMohan's Pizza - Large - Ready to Eat			With Mushroom		W/O Chilly Flakes		^ I-Note		Misc		^ Status Initiated	

Delete ItemSelectedAllQuantity1Item Order1

ItemsWith-WithoutAdditional ChargesLoad Items From SO

Search Item Here

Scan Barcode Here

Main Category	Items	Internal Code	List Price	Tax
Bakery	Fruit Bun		10	
	McMohan's Pizza - Large - Ready to Eat		100	
	McMohan's Pizza - Medium - Ready to Eat		70	
	McMohan's Pizza - Small - Ready to Eat		50	
	Pizza Base - Large	PB-L	50	
	Pizza Base - Medium		40	

Gross Price(Incl.)120.00

Discount % :0

Discount :0.00

Sale Price(Incl.)120.00

Addl. Chrgs(Incl.)0.00

^ Tax Amount :0.00

Net Price :120.00

^ Round Off :0.00

Receivable Amt:120.00

^ Change Paid :0.00

Amt Balance :120.00

^ Current Credit BalancePay/Take Balance

0.00

Received IN^ Amount

Cash0.00D

*0.00D

Amt Received0.00Clear

Print SetTwo Copies

CopyAllInvoice

SizeA4 PortraitInvoice

Sale Slip1L 80(70) mm

Print AllPrint/Send PDF

We pressed Escape key and thereby, the text "Normal Sale" got undone/deleted.