



invoiceFLEX[™] for BusinessVision[®]

Gemini Logic Inc.
2600 Skymark Avenue
Building 10, Suite 101
Mississauga, Ontario L4W 5B2

Tel: 905-625-7212
Fax: 905-625-9644
E-mail: info@geminilogic.com
Internet: www.geminilogic.com

***invoiceFLEX™* Overview**

invoiceFLEX from Gemini Logic Inc. enables you to reverse or duplicate an invoice with ease! *invoiceFLEX* is easy to install and set up, and offers full support for multi-user environments. (*invoiceFLEX* is licensed on a per workstation basis.)

invoiceFLEX provides three main options:

1. **Reverse** - creates a "credit" order in the BusinessVision Order file, that when processed effectively reverses the original invoice (the original invoice is maintained on file and a new invoice with negative quantities is posted to the account)
2. **Duplicate** - creates a new order in the BusinessVision Order file that is a replica of the original invoice. This order can then be processed as is, or modified and then invoiced
3. **Reverse & Duplicate** - creates both a "credit" order and a new duplicate order in the BusinessVision Order file

In each case, inventory is committed or de-committed as appropriate, maintaining system integrity.

***invoiceFLEX* Options**

Below is an explanation of the fields and criteria that can be specified when reversing and/or duplicating an invoice:

1. Invoice Number

Enter the invoice number of the original invoice that is to be reversed/duplicated. Either enter the invoice number manually or select from the Browse list by clicking the Browse icon. Hint: If you frequently use the same invoice to create duplicate orders, click the Padlock icon to save the invoice number in this field.

2. Create order using

Specify the order number that is to be used when creating the new order. Options are:

- *Next available order number* - the next available order number on the BusinessVision Order file
- *Original order number* - the order number that was used when the original order was created
- *This order number* - manually enter the order number that you would like the system to use

3. Order Date

Specify the order date that is to be used when creating the new order. Options are:

- *Use original order date*
- *Use today's date*

4. Invoice Date

Specify the invoice date that is to be used when creating the new order. Options are:

- *Use original invoice date*
- *Use today's date*

5. Pricing

Specify whether you wish to maintain the original pricing or whether you wish the pricing to be updated automatically on the new order. Options are:

- *Keep original invoice pricing and discounts* - creates the new order maintaining the original invoice pricing (pricing will be maintained on the new order even when tabbing through each line item). Hint: You may still modify the pricing manually, however, the tabbing process will not automatically update pricing
- *Allow order to be re-priced (Tab through line items on new order)* - creates the new order with the original invoice pricing, but will automatically update pricing when tabbing through each line item

6. Options

- *Prompt when returning serialized inventory items* - when "reversing" an invoice with serialized items, you will be prompted to return the assigned serial numbers to inventory. When "duplicating" an invoice with serialized items, a prompt will advise which serialized items are included on the new order. When processing the new order in BusinessVision, depending on the serialization options pre-established in System Setup, simply tab over the line items in question or invoice the order in the normal manner
- *Copy WorkBook* - when checked, any WorkBook details attached to the original invoice will be copied to the new order.
- *Copy Notes* - when checked, any existing Notes attached to the original invoice will be copied to the new order.

***invoiceFLEX* Tools Menu**

Under the *invoiceFLEX* Tools-Options Menu, the option to specify a default Customer Number for use when reversing or duplicating an invoice that was originally created as a "Cash Sale" in the Point-of-Sale module is provided.

Simply enter a default Customer Number that *invoiceFLEX* will use when creating the reversed/duplicated order. Hint: Once the new order is opened in the Order Entry module, you may modify the Customer Number, if required.

Purchasing *invoiceFLEX*

Initially, *invoiceFLEX* can be run in "trial" mode for a period of fifteen days. To purchase *invoiceFLEX*, follow the instructions below to receive a License Key.

Logon to *invoiceFLEX* and click the Purchase button on the Trial Status screen. Select the company from the Company Selection List and enter your User Name and Password. Click Print. Complete the printed Registration Form, with payment method, and fax to Gemini Logic Inc. at 905-625-9644. Your License Key will be e-mailed/faxed to you within two business days.

Entering Your License Key

Logon to *invoiceFLEX*, and click the License Key button. Enter the Registered Name and License Key that was provided to you, and click OK. (Note that this information is case-sensitive and should be entered exactly as detailed.) This completes the registration process.

Transferring Your License to Another Workstation

invoiceFLEX is licensed on a per workstation basis. Should you need to transfer an existing license to a new workstation, follow the steps below. Note that once these steps are completed, *invoiceFLEX* will be disabled on the original workstation.

1. Go to www.geminilogic.com and download *invoiceFLEX* to the new workstation.
2. Launch *invoiceFLEX* and note down the new product Registration Number from the Trial Status screen or print the registration form.
3. On the workstation where *invoiceFLEX* was originally registered, go to a Windows command line prompt: Start→Run→Cmd, then click OK.
4. Change directory to the folder where *invoiceFLEX* was installed (e.g. CD C:\programfiles\geminilogic\invoiceflex).
5. Type `invoiceflex /TRANSFER XXXX-XXXX-XX` (where XXXX-XXXX-XX is the Registration Number noted in Step 2 above).
6. A file called "TRANSFER.TXT" is written to the original program directory, and NotePad displays the Registered Name and License Key that can be used to license the new workstation.
7. Launch *invoiceFLEX* on the new workstation, click the License Key button, and enter the Registered Name and License Key. Click OK. This completes the license transfer process.

For assistance on any registration or licensing issue, please call us at 905-625-7212.

System Requirements

- BusinessVision Limited, Small Business, Standard or Client-Server SQL Edition, Version 7 or higher
- Windows 2000 or Windows XP operating system
- 20 MB of free disk space