

ClickPOS Batch Plan Sale (Contract Only)

Overview

Ability to sell multiple identical services at one time without the need to repeat the process for each individual service

Impact

Batch plan sale will dramatically speed up sales processing of multiple services by allowing you to copy and paste a list of service numbers.

Limitations

- The plan must be the same for all service numbers within the batch process
- The active date must be the same for all service numbers within the batch process

Prerequisite - User Group Permissions

1.11.240 Phone - Allow Batch Plan Sale will need to be applied to all user groups that would require the use of batch sales processing

Process

1. Proceed to start a new Invoice
2. Add customer to the invoice
3. Proceed to the Phone tab
4. Select plan using the provided filters
5. Complete other required information on the screen **except** the mobile number
6. Tick the 'Batch' checkbox next to the mobile number field and click OK

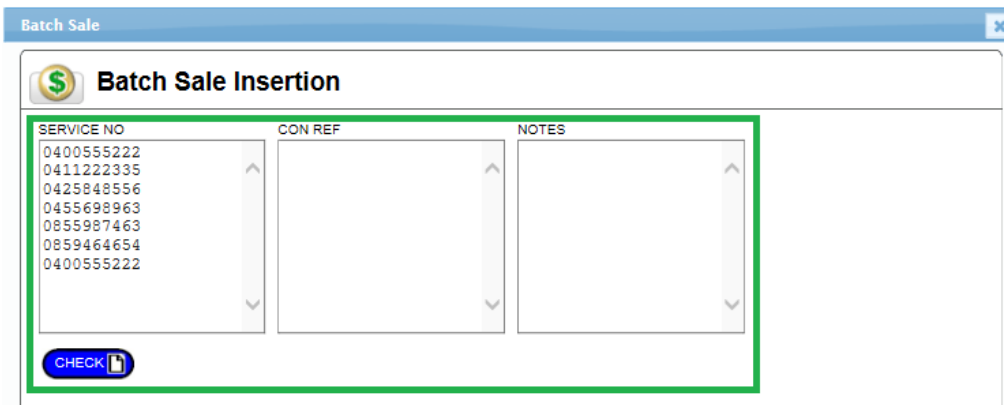
The screenshot shows the 'Handset Details' form in the ClickPOS software. The form is divided into several sections: 'Ph Details' (with sub-tabs: Services, Account, Other, Shipping, Landline), 'Handset Details', 'Sale Price \$', and 'Service Provider'. The 'Batch' checkbox is highlighted with a green box. The 'OK' button is also highlighted with a green box.

Handset Details	
Mobile No	<input type="text"/> <input type="checkbox"/> Batch ? Repeat <input type="text"/>
Phone Type	<input type="text" value="Contract Only"/>
Colour	<input type="text"/>

Sale Price \$		Service Provider	
Sale	<input type="text" value="0.00"/>	Con Ref	<input type="text"/>
RRP (Retail Price)	<input type="text" value="0.00"/>	Carrier	<input type="text" value="Mobile Plans"/>
Discount	<input type="text" value="0.00"/>	Active	<input type="text" value="28/04/2014"/> <input type="button" value="📅"/>
Tax %	<input type="text" value="10.00"/>	Months	<input type="text" value="12"/> End <input type="text" value="28/04/2015"/>
Credit No.	<input type="text"/>	Notes	<input type="text"/>
SIM	<input type="text"/>		<input type="checkbox"/> Multi
Purchase price \$	<input type="text" value="0.00"/>	Inv Notes	<input type="text"/>

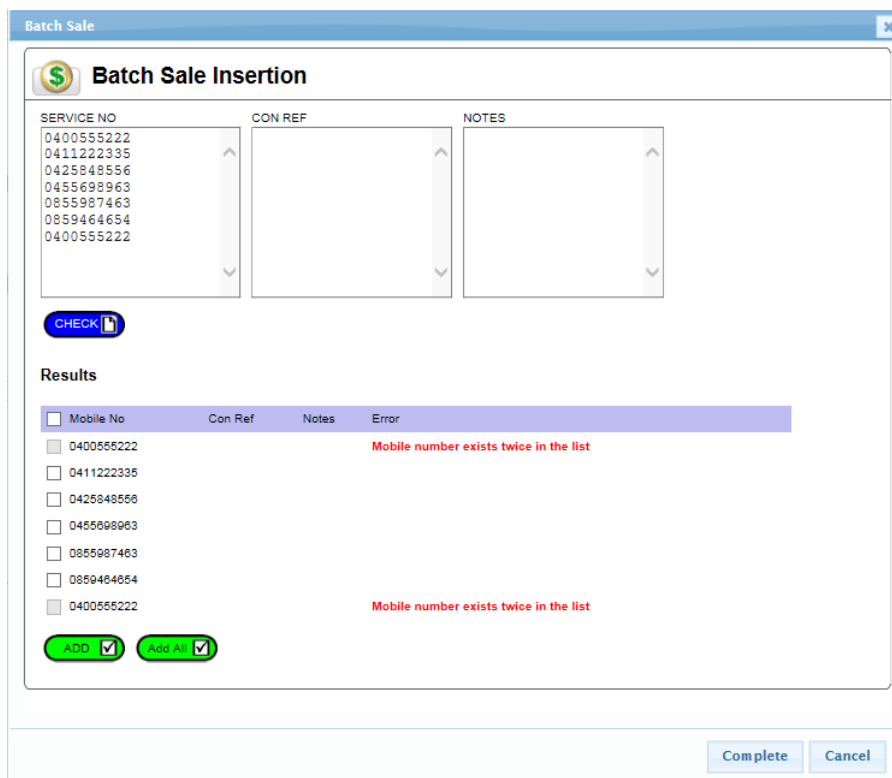
7. Enter or paste in the list of service numbers
You may also add a Connection Reference and/or Notes if required

8. Click Check



9. Results will be displayed

Any discrepancy results will be unavailable for processing until the issue has been resolved
Remove or check the service number that is causing the issue and click check again.



10. To process the results, you can either...

- Tick each record individually and then click Add
- Or alternatively just click Add All which automatically process all non-discrepancy records

11. Click Complete once you have add the required records

12. Remember that discrepancy service numbers will remain and will not be referenced

13. Done

Modification of records sold via Batch

You can search and modify each record as per existing method.

- Search and enter Invoice Edit Mode
- Click on line item required for modification
- Modify where necessary
- Save record and exit