




TAMS II Release Notes

Version 3.07.04.00

April 11, 2022

What's in this release

- **New!** Email invoices and statements to your customers:
 - **Email invoices** field lets you email customers invoice receipts.
 - **Email statements** field lets you email interim statements and closing statements.
 - Send past invoice receipts to different email addresses at your customers' requests.
-  *This feature is being rolled out in phases over the next few months; we will notify you when it is available at your location.*
- Open saved invoices for a serving store when you log into your Phone room.

See below for details on all new features and fixes in this release.

New

Invoices and statements

Customer information Interim and closing statements

TNSS-2880/2881



Phased rollout

- Enroll customers in **Email invoices** on the **Invoicing info** tab in **Customer information**. They will receive invoice receipts when you print and complete invoices from the point of sale.

The screenshot shows the 'Invoicing Info' tab with various fields. The 'Email Invoices' field is highlighted with a yellow box and contains the email address 'tomgione@bellfarm.com'.

- Enroll customers in **Email statements** field on the **A/R Info** tab in **Customer information**. They will receive interim and closing statements by email when you generate statements.

The screenshot shows the 'A/R Info' tab with various fields. The 'Email Statements' field is highlighted with a yellow box and contains the email address 'sammybell@gmail.com'.

Invoices and statements

Interim and closing statements

TNSS-2881/3159



Customers receive an email when you generate interim statements and closing statements to the **Email statements** address in their **Customer information**.

Review and change transactions

TNSS-2880



When customers request an invoice from past sales transactions, email an invoice receipt to their **Email invoices** address or to a different address.

1. Go to **Review/change transactions**.
2. On the **Selection criteria** tab, enter a **Customer number**.
 - To choose invoices from a single day, enter the same date in the **Date** range fields.
 - To choose invoices from a specific timeframe, enter a **Date** range.
3. On the **Transaction list** tab, select one or more invoices.

4. Select **Email invoice**.
The **Email e-invoice** message shows the **Email invoices** address by default.
If the customer wants to receive the invoice at a different address, enter it in the **Email address** field in the **Email e-invoice** message.

⚠ This does not change the email address on the customer's information for future email invoices.

5. Select **Send email**. The customer receives an email invoice at the address entered in **Email address**.

Invoices

Checkout

TNSS-2880/2946



Phased rollout

Customers with an **Email invoices** address in their **Customer information** receive an email receipt when you print and complete their transaction.

Fixed

Accounts receivable

Customer account receivable activity

TNSS-2662

The issue preventing you from using unapply on journal entries with a \$0 balance has been fixed. Now, you can unapply these journal entries any time before you finalize closing statements, whether or not it has a \$0 balance.

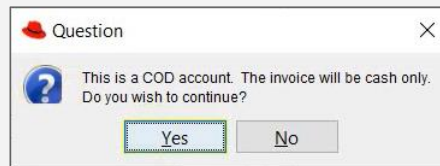
Invoices

COD (cash on delivery) accounts

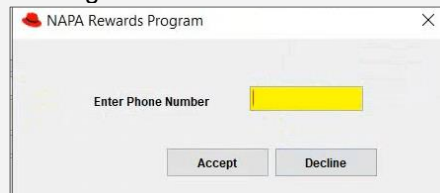
TNSS-3147

We fixed the issue with the following messages displaying twice:

- When you create an invoice for a customer set up as cash, you are asked this question once:



- When creating an invoice for customers with saved invoices, you now only see this message once:



Buy online pick up in store

TNSS-3190/3245/3245

We fixed the issue with parts not displaying when you print a pull list. Now when you print the pull list for a BOPIS order, the parts print on the list.

When customers cancel a BOPIS order, you can acknowledge the message for the canceled order which stops the beeping for that message.

Invoices

Phone room

TNSS-2877

This fix applies to the store selected in the **Store** drop down menu on the **Recall store saved** invoices screen.

You can now view, open, and finalize saved invoices created from any store in your phone room group.

090 Invoice - SERVER DELLQA6

Other Functions Logout Catalog Help

Store: 090 SERVER DELLQA6

Customer: [Search] [F3]

Message [F4] Catalog [F9]

ROA [F6]

Recall Saved Invoices

Store: 090 DELLQA5

Phone Invoices [F2]

Seq #	Customer	Order #	Attention	Employee	Phone Number	Date	Time	# Of Items	Purge Date
1)	10 Guru Bhalagangadhar			1 DELLQA5 SERVER		03/11/2022	07:30 AM	2	03/25/2022
2)	10 Guru Bhalagangadhar			1 DELLQA5 SERVER		03/11/2022	07:29 AM	2	03/25/2022
3)	41050 Buy Online Pickup In...			1 DELLQA5 SERVER		11/10/2021	05:55 AM	13	11/24/2021
4)	41050 Buy Online Pickup In...			1 DELLQA5 SERVER		11/10/2021	05:45 AM	7	11/24/2021
5)	41050 Buy Online Pickup In...			1 DELLQA5 SERVER		11/08/2021	03:58 AM	7	11/22/2021
6)	41050 Buy Online Pickup In...			1 DELLQA5 SERVER		07/19/2021	05:00 PM	3	08/02/2021
7)	41050 Buy Online Pickup In...			1 DELLQA5 SERVER		07/19/2021	04:19 PM	6	08/02/2021
8)	9076 HQ NAPAONLINE SPE...			1 DELLQA5 SERVER		07/08/2021	03:14 AM	4	07/22/2021
9)	9076 HQ NAPAONLINE SPE...			1 DELLQA5 SERVER		07/08/2021	02:28 AM	4	07/22/2021
10)	41050 Buy Online Pickup In...			1 DELLQA5 SERVER		06/22/2021	08:23 AM	5	07/06/2021
11)	41050 Buy Online Pickup In...			1 DELLQA5 SERVER		06/18/2021	05:57 AM	4	07/02/2021
12)	41050 Buy Online Pickup In...			1 DELLQA5 SERVER		06/16/2021	03:25 PM	3	06/30/2021

Seq/Order/Phone Num [Review/Edit [F3] Invoice [F8] Delete [F5] Cancel [Esc]