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Basket Plug-In

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1.0 Introduction

The Basket plugin provides efficient tracking of basket movement, accurately documenting both the incoming and outgoing transactions. This feature proves highly valuable for wholesale businesses operating in the fruit and vegetables industry. This streamlined tracking system optimizes operations, facilitating seamless monitoring of basket transfers and enabling wholesale businesses to maintain a comprehensive record of their inventory transactions.

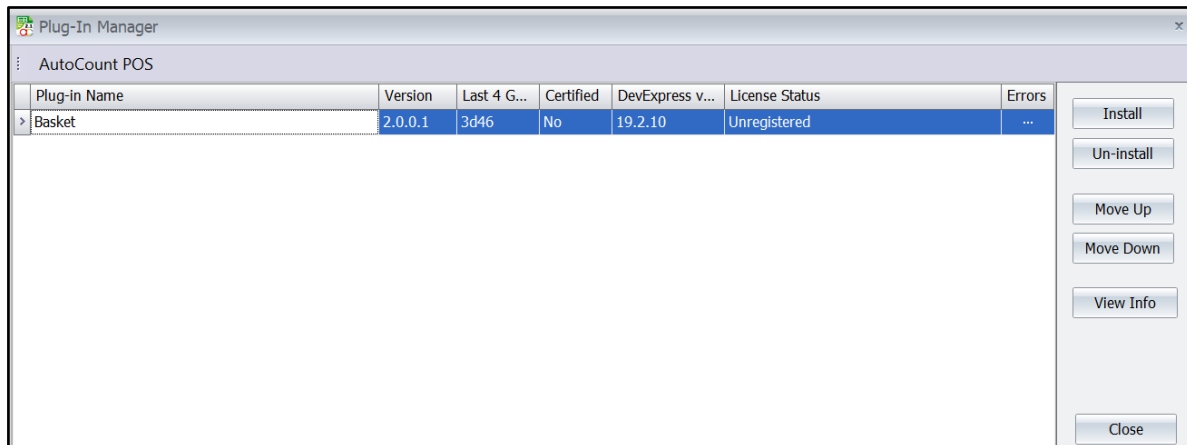


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2.0 Installing the Plug-In

1. Go to **Tools > Plug-In Manager**
2. Click on the **“Install”** button.
3. Browse for the related **.app file (Basket)**
4. A new window will prompt with some basic information of this plug-in.
5. Click on the **“Install”** button again to proceed.
6. A confirmation message will be prompted after that.
7. Click **“Yes”** to confirm the installation.
8. A success message will appear after the plug-in is installed correctly.

Basket	7/12/2023 9:11 AM	AutoCount Plugin Pa...	232 KB
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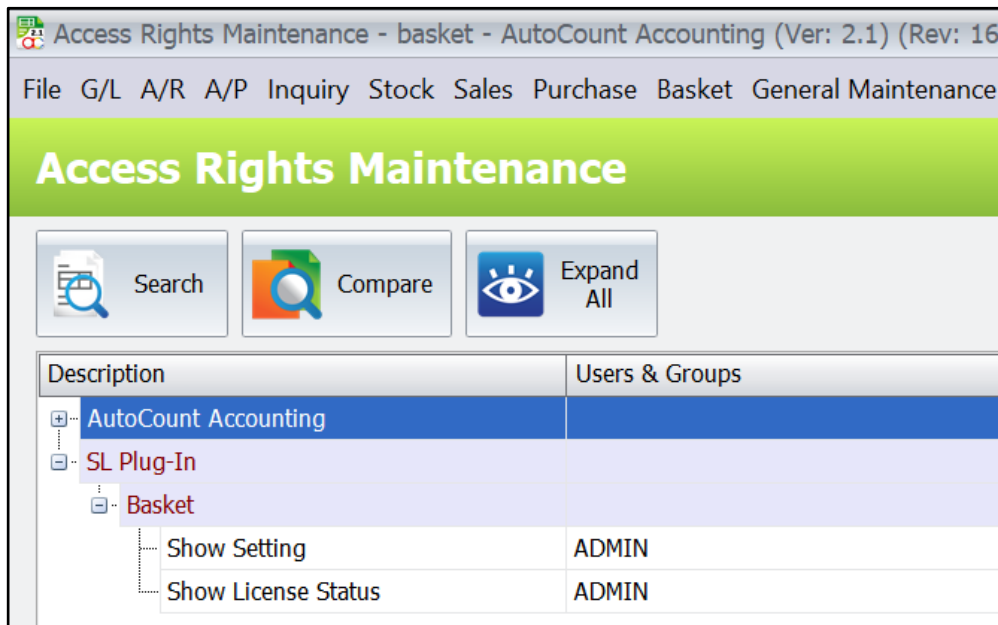




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3.0 Assign Access Rights

1. Go to **General Maintenance > Access Right Maintenance**
2. Locate the “SL Plug-In” and click on the “+” icon next to it.
3. Locate the “Basket” and click on the “+” icon next to it.
4. Click on “Basket” and proceed by clicking “Set Group Access Rights”.
5. In the pop-up window, navigate to “Admin”. **(Example)**
6. Change the “Don’t change” status to “Add”.
7. Click on “OK” to save changes.
8. Click on “Yes” to apply the Access Right to the rest of the sub commands.

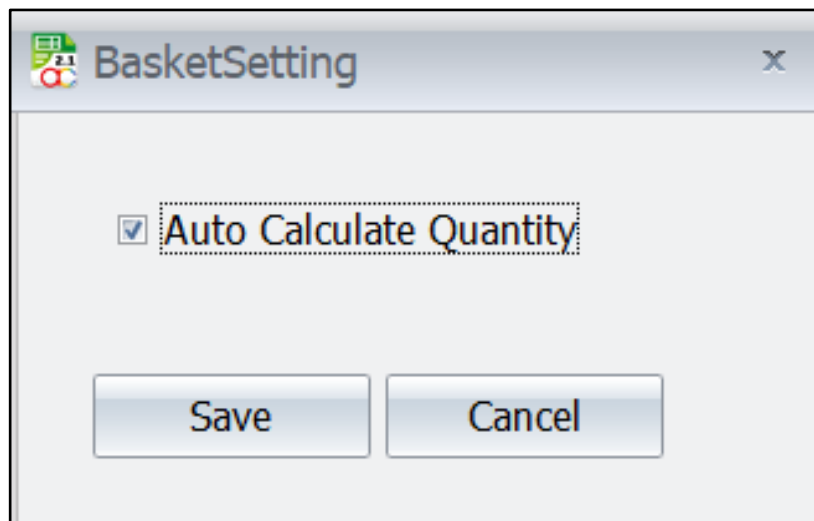




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4.0 Basket Setting

1. Go to **Basket > Basket Setting**
2. **MAKE SURE** the “**Auto Calculate Quantity**” checkbox is ticked.
3. Click on the “**Save**” button.



The Basket Setting feature enhances user convenience by automating the calculation of the basket quantity. Once users input the correct value, the system automatically computes the basket balance quantity, saving time and effort since it eliminates the need of manual calculations.



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5.0 Debtor

1. Go to **A/R > Debtor Maintenance**
2. Click on the **“New”** button.
3. Input Debtor info.
4. Click on the **“User Define Field”** tab.
5. Input value (number) at **“Balance Basket”** text field.
6. Click on the **“Save”** button.

Text Field	Description
Balance Basket	Allow users to record how many baskets are currently with the customers.
Last Doc No	Allow users to view what was the last order made. (UNABLE to perform editing)

Account created on : 12/07/2023



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6.0 Creditor

1. Go to **A/P > Creditor Maintenance**
2. Click on the **“New”** button.
3. Input Creditor info.
4. Click on the **“User Define Field”** tab.
5. Input value (number) at **“Balance Basket”** text field.
6. Choose available Debtor in the **“Debtor Code”** text field.
7. Click on the **“Save”** button.

Text Field	Description
Balance Basket	Allow users to record how many baskets are currently with the customers.
Debtor Code	To facilitate basket deduction, users are REQUIRED to set up the Creditor-Debtor relationship if the same person serves as both the Creditor and the Debtor.
Last Doc No	Allow users to view what was the last order made. (UNABLE to perform editing)

The screenshot shows the 'Edit Creditor Account' window in AutoCount Accounting (Ver: 2.1). The window title is 'Edit Creditor Account - [400-C002] - basket - AutoCount Accounting (Ver: 2.1)'. The window has a menu bar with 'Edit', 'Copy Creditor', and 'Window'. The main area contains the following fields and options:

- Control Account: 400-0000
- Creditor Type: [Dropdown]
- Group Company:
- Company Name: CLIENT 2
- Active:
- Registration No.: [Empty]
- Creditor Account: 400-C002

Below these fields are several tabs: General, Contact, Branches, Tax Exemption, Others, Note, and User Defined Field. The 'User Defined Field' tab is active, showing the following fields:

- Balance Basket: -6
- Debtor Code: 300-C002
- Last Doc No: I-000003

At the bottom of the window, there is a status bar that says 'Account created on : 12/07/2023' and two buttons: 'Save' and 'Cancel'.



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7.0 Sales & Purchase Documents Entry

7.1 Sales & Purchase Documents Entry (Basket Info)

- Documents entries that have the “**Basket Info**” control are
 - Delivery Order
 - Invoice
 - Cash Sales
 - Credit Note
 - Goods Received Note
 - Purchase Invoice
 - Cash Purchase
 - Purchase Return

The screenshot displays the 'New Invoice' form in the AutoCount Accounting software. The 'Basket Info' section is highlighted with a red box, showing the following values:

Basket	
Last Balance Basket	0
Out Basket	0
In Basket	0
Adjustment	0
Balance Basket	0

The main table below the form shows a single record with a total of 0.00. The interface also includes a toolbar with various icons and a status bar at the bottom.



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7.2 Sales & Purchase Documents Entry (Operate)

1. Go to **Sales / Purchase**
2. Choose document options.
3. Click on the **“New”** button.
4. Input debtor info (**Sales Document**) or creditor info (**Purchase Document**).
5. Key in Item info in grid.
6. Input value in **“KGPerCtn”** and **“Ctn”** column respectively.
 - **NOTE:** System will automatically calculate and display new **“Qty”** value.
 - **FORMULA:** **[KGPerCtn x Ctn = Qty]**
7. System will automatically populate **“Out Basket”** text field with the corresponding **“Ctn”** value.
 - **NOTE:** **“IsBasket”** checkbox **MUST BE** Ticked
 - **NOTE:** If **NOT TICKED** **“Out Basket”** text field will **NOT** be populated
8. Input value in **“In Basket”** and **“Adjustment”** test field. (**OPTIONAL**)
9. Click on the **“Save”** button.
10. System will calculate and display **“Balance Basket”** value based on the criteria.

Criteria	Formula (For Basket Balance)
<u>NO</u> In Basket & Adjustment	Last Balance Basket + Out Basket
<u>NO</u> Adjustment, <u>WITH</u> In Basket	[Last Balance Basket + Out Basket] – In Basket
<u>NO</u> In Basket, <u>WITH</u> Adjustment	[Last Balance Basket + Out Basket] + Adjustment
<u>WITH</u> In Basket & Adjustment	[Last Balance Basket + Out Basket] – [In Basket] + [Adjustment]



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New Invoice - [Next Possible No: I-000004] - basket - AutoCount Accounting (Ver: 2.1)

Home Edit

Save as Draft Save as Template Save TAX Set Tax Date Group Total Editing Discount Total Cost Change Unit Price Item Search Show Instant Info Copy from other Invoice Copy Copy to a new Invoice Transfer From Quotation Transfer From Sales Order Transfer From Delivery Order Transfer By Value From Sales Order Check Transferred To Status

Debtor Info: Debtor 300-C001, Name CUSTOMER 1, Address No 7, Jalan Bersatu, Ipoh, Perak.

Basket Info: Last Balance Basket 6, Out Basket 4, In Basket 2, Adjustment 1, Balance Basket 9

Delivery Detail: Branch, Delivery Address, Contact, Phone

Document Info: Invoice No <<New>>, Date 17/07/2023, Credit Term C.O.D., Ship Via, Sales Agent, Shipping Info

Item Code	Description	Description 2	F...	U...	Qty	Unit Pr...	Disc...	Total	Is Basket?	KGPerCtn	Ctn	Tax C...	Tax R...	Sales...	Tax	Total (ex)	Total (inc)
VB-001	BROCOLLI		...	UN...	12	20.00		240.00	<input checked="" type="checkbox"/>	3	4				0.00	240.00	240.00
					12		240.00								0.00	240.00	240.00

Subtotal (ex) 240.00, Taxable Amount 0.00, Tax 0.00, Total 240.00

Proceed New Invoice Save Save & Preview Save & Print Cancel

Edit Debtor Account - [300-C001] - basket - AutoCount Accounting (Ver: 2.1)

Edit Copy Debtor Window

Control Account : 300-0000 Debtor Type : Group Company

Company Name : CUSTOMER 1 Active

Registration No. : Debtor Account : 300-C001 +

General Contact Branches Tax Exemption Others Note User Defined Field

Balance Basket : 9

Last Doc No : I-000004

Account created on : 12/07/2023

Save Cancel

Balance Basket value will be updated after Save.



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7.3 Sales & Purchase Documents Entry (Basket Update)

1. Go to **Sales / Purchase**
2. Choose document options.
3. Select available documents.
4. Click on the **“Basket Update”** button.
5. Able to change value for both **“In”** and **“Adjustment”**.
6. Click on the **“Save”** button to update.

The 'Form Edit Basket' dialog box contains the following fields and values:

Basket	
B/F	6
Out	4
In	1
Adjustment	3
C/F	12

Buttons: Save, Cancel

The 'Edit Invoice' window shows the 'Basket Info' section with the following values:

Basket	
Last Balance Basket	6
Out Basket	4
In Basket	1
Adjustment	3
Balance Basket	12

The 'Item' table below shows:

Item...	Description	Description 2	F...	UOM	Qty	Unit Price	Disco...	Total
V...	BROCOLLI		...	UNIT	12	20.00		240.00

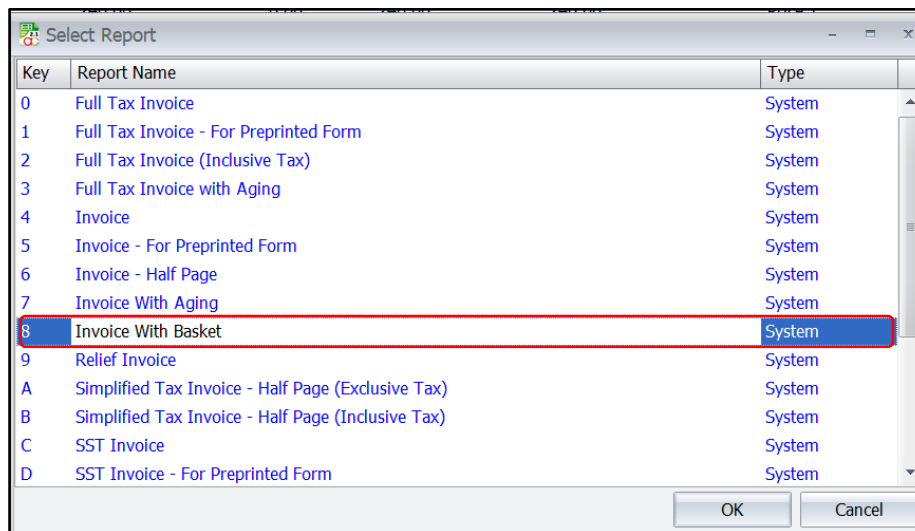
A yellow dashed box labeled 'Updated Value' is overlaid on the bottom right of the window.



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7.4 Sales & Purchase Documents Entry (New Report)

1. Go to **Sales / Purchase**
2. Choose document options.
3. Select available documents.
4. Click on the **“Preview”** or **“Print Button”** button.
5. Choose new report option.
6. Click on the **“OK”** button to view report.





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INVOICE		No. : I-000004													
CUSTOMER 1 No 7, Jalan Bersatu, Ipoh, Perak.		Your Ref. : Our D/O No. : Terms : C.O.D. Date : 17/07/2023 Page : 1 of 1													
TEL :	FAX :														
Item	Description	Qty of Ctn	Ctn/KG	Total KG	UOM	U/ Price RM	Disc.	Total RM							
1.	BROCOLLI	4	3	12	UNIT	20.00		240.00							
RINGGIT MALAYSIA TWO HUNDRED FORTY ONLY		4	12	Total		240.00									
Notes : 1. All cheques should be crossed and made payable to basket 2. Goods sold are neither returnable nor refundable. Otherwise a cancellation fee of 20% on purchase price will be imposed.		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: left;">Basket Info</th> </tr> </thead> <tbody> <tr> <td style="width: 80%;">Basket B/F</td> <td style="text-align: right;">6</td> </tr> <tr> <td>Basket Out</td> <td style="text-align: right;">4</td> </tr> <tr> <td>Basket In</td> <td style="text-align: right;">1</td> </tr> <tr> <td>Adjustment</td> <td style="text-align: right;">3</td> </tr> <tr> <td>Basket C/F</td> <td style="text-align: right;">12</td> </tr> </tbody> </table>		Basket Info		Basket B/F	6	Basket Out	4	Basket In	1	Adjustment	3	Basket C/F	12
Basket Info															
Basket B/F	6														
Basket Out	4														
Basket In	1														
Adjustment	3														
Basket C/F	12														
_____ Authorised Signature															



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Overall, the addition of new controls and columns empowers users to input values that contribute to the calculation of baskets, including quantity, basket balances, and other relevant factors.

In addition, to further enhance user productivity and streamline the process of updating return baskets, a dedicated "**Basket Update**" button has been introduced. This feature provides users with a faster and more efficient method to modify and update return baskets.

Finally, a new report has been introduced to provide users with a comprehensive overview of the overall basket information. This report presents the basket details in a structured format, allowing users to conveniently access and analyze the complete basket information at a glance.