

Quote Handling Improvements

Overview

Parameter Maintenance

The Billing Parameters have been updated to allow the inclusion of Orders, Quotes and Packing Slips in the document search options when you call up a customer in the invoicing screen. For Quotes the option to Delete and the Default setting for the Delete have also been added.

Billing Parameters Fix Program			Screen 4 : System Configuration		
Last Invoice			1803982		
Last Packing Slip			71438		
Last Quotation			89592		
Last Order			2563		
Last Reference Number			795520		
6	Sales History/Financial Period	5 / 6	27	Log Weeks	12
8	Branch #/Remote Site	01 / N	28	Next Barcode	70013327917
10	SST On GST?	N	29	Barcode First	N
11	Sleep Amount Time	1	30	Catalogue Sponsor	000106
12	Unix Or Xenix?	U	31	One Backorder File	Y
13	Site Name	Fortin's	32	Use Vehicle/Group Sequence	
14	Auto Update Discount Levels	N	33	Batch Reference	518530
15	Use Committed?	N (Y/N/S)	34	E-Cat Sponsor	000106
16	Update Order Inventory?	Y	35	Holding Company?	N
17	Week/Day/Weeks in Year	17 / 7 / 52	36	Alter Line on Running Invoice?	Y
20	Sales Ranking (U)nits/\$	\$	37	Blank Invoice from Order?	N
21	Orders/Packing Slips Offer	Y	38	Clerk Close-Off Report	C (A/C)
22	Quotes Offer/Delete/Default	Y / Y / Y	39	Price Update Reductions OK?	Y (Y/N)
25	Price File Path	/usr2/data1/temp	40	Remove Zero Price Items from Price Book?	N (Y/N)
26	User Price File Path		41	Kit Components on Invoice?	Y (Y/N)
Any change? 1.			42	Signature Required/Default?	Y / Y (Y/N)
			44	Print Labels	N (Y/N)
			45	Question on Auto Email	4 (1,2,3,4)
			46	Invoice Qty (F11) Key Use	I (W/I)
			47	Corporate SubSales	Y (Y/N)

The menu path to modify these setting is **System Utilities > Sales Desk > Parameter File Reset > Screen 4**

Invoicing

In the Invoice screen when a customer is entered various messages could be displayed based on the outstanding documents of file for the customer. One or many of these options could be displayed O - Open Orders, P - Packing Slips, Q - Quotes, A - All, N - None such as shown below.

Customer # <input type="text" value="000365"/>		<input type="button" value="i"/> Bill To <input type="text" value="000365 CANADIAN TRUCK"/>		Tue May 10 2022 13:47:31	
CANADIAN TRUCK REPAIR 3879 RAILWAY AVE		<input type="button" value="Ship Via"/> <input type="button" value="Notify"/> <input type="button" value="Salesman"/>		GERRY JONES	
VANCOUVER BC		<input type="button" value="GST Lic. #"/> <input type="button" value="PST Lic. #"/>		ON FILE 12345678	
V5X 2P2 Phone <input type="text" value="(780) 888-3244"/>		<input type="button" value="FOB"/> <input type="button" value="PO #"/> <input type="button" value="Clerk #"/>		3 CLERK #3	

line	type	Part Number	Description	Quantity	Eco Fee	Core	plv	Net Price	+/-%	Extension	tax
1											
2											
3											
4											
5											
6											

[Click to view additional part number detail](#)

Customer Status				Invoice Summary			
ShipTo Code <input type="text" value="0"/>	Fax # <input type="text" value="(780) 888-3003"/>	Last Payment \$	Current	Sub Total			
		30 days		+/-	%		
		60 days		Provincial Tax			
		90 days		Freight Charges			
Credit Rating	Cr. \$ Limit	Dating		G.S.T.			
		Total Due		TOTAL			

Message Window

OPQ present: view A/O/P/Q/N ? N

F1	Back to Menu	F3	Recall Invoice	F4		F5	Catalogue	F7		F8		F9		F10	Cust. Search	F11	Phone Lookup	
F1	Invoice History	F2	Close P/Ticket	F3	Cust. Info	F4	QUICKSCAN	F5	Branch Inq.	F6	Suspended Tr.	F7	P/Ticket Inq.	F8	Find Product	F9	Cust. Notes	

The default is always "N" to continue and start a new transaction but any of the other options can be entered to launch the search function.

[illegible]