

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

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"/>		Bill To <input type="text" value="000365 CANADIAN TRUCK"/>		Tue May 10 2022 13:47:31	
CANADIAN TRUCK REPAIR 3879 RAILWAY AVE		Ship Via		Payment Method	
VANCOUVER		Notify		Transaction Type	
V5X 2P2		Salesman			
BC		GST Lic. #		FOB	
Phone <input type="text" value="(780) 888-3244"/>		PST Lic. #		PO #	
		ON FILE		Clerk #	
		12345678		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	F2 Back to Menu	F3 Recall Invoice	F4	F5 Catalogue	F7	F8	F9	F10 Cust. Search	F11 Phone Lookup	
Invoice History	Close P/Ticket	Cust. Info	QUICKSCAN	Branch Inq.	Suspended Tr.	P/Ticket Inq.		Find Product	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]