

# 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"/>		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		<b>TOTAL</b>			

**Message Window**

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

F1	F2 Back to Menu	F3 Recall Invoice	F4	F5 Catalogue	F6	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]

Updated 19 May 2022 22:24:14 by Jim