

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 | | 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]