

# 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		<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	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]