

# 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 (Units/\$)		\$	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.

The screenshot displays the Invoicing software interface for customer 000365. At the top, customer information includes 'CANADIAN TRUCK REPAIR' at '3879 RAILWAY AVE VANCOUVER BC V5X 2P2' with phone '(780) 888-3244'. Billing details show 'Bill To: 000365 CANADIAN TRUCK', 'Ship Via', 'Notify: GERRY JONES', 'Salesman', 'GST Lic. # ON FILE', 'PST Lic. # 12345678', 'FOB', 'PO #', and 'Clerk # 3 CLERK #3'. The date is 'Tue May 10 2022 13:47:31'. Below this is a table with columns: line, type, Part Number, Description, Quantity, Eco Fee, Core, plv, Net Price, +/-%, Extension, and tax. The table contains 6 empty rows. A 'Message Window' at the bottom shows 'OPQ present: view A/O/P/Q/N ? N'. The interface also includes 'Customer Status' (ShipTo Code 0, Fax# (780) 888-3003, Last Payment \$, Current, 30 days, 60 days, 90 days, Dating, Total Due, Credit Rating, Cr. \$ Limit) and 'Invoice Summary' (Sub Total, +/- %, Provincial Tax, Freight Charges, G.S.T., TOTAL).

F1	Back to Menu	Recall Invoice	F4	F5	Catalogue	F7	F8	F9	Cust. Search	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.

