

# 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				
Any change? <input checked="" type="checkbox"/>			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 #	000365	Bill To	000365 CANADIAN TRUCK	Tue May 10 2022
CANADIAN TRUCK REPAIR		Ship Via		13:47:31
3879 RAILWAY AVE		Notify	GERRY JONES	Payment Method
VANCOUVER		Selesman		Transaction Type
V5X 2P2	BC	GST Lic. #	ON FILE	
Phone (780) 888-3244		PST Lic. #	12345678	
		FOB		
		PO #		
		Clerk #	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	0	Fax#	(780) 888-3003	Last Payment \$	Current	Sub Total	
					30 days	+/-	%
				Was On	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 Menu	F3 Recall Invoice	F4	F5	F6 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.

