

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 | Log Weeks | | 12 |
| Last Packing Slip | | 71438 | Next Barcode | | 70013327917 |
| Last Quotation | | 89592 | Barcode First | | N |
| Last Order | | 2563 | Catalogue Sponsor | | 000106 |
| Last Reference Number | | 795520 | One Backorder File | | Y |
| Sales History/Financial Period | | 5 / 6 | Use Vehicle/Group Sequence | | |
| Branch #/Remote Site | | 01 / N | Batch Reference | | 518530 |
| SST On GST? | | N | E-Cat Sponsor | | 000106 |
| Sleep Amount Time | | 1 | Holding Company? | | N |
| Unix Or Xenix? | | U | Alter Line on Running Invoice? | | Y |
| Site Name | | Fortin's | Blank Invoice from Order? | | N |
| Auto Update Discount Levels | | N | Clerk Close-Off Report | | C (A/C) |
| Use Committed? | | N (Y/N/S) | Price Update Reductions OK? | | Y (Y/N) |
| Update Order Inventory? | | Y | Remove Zero Price Items from Price Book? | | N (Y/N) |
| Week/Day/Weeks in Year | | 17 / 7 / 52 | Kit Components on Invoice? | | Y (Y/N) |
| Sales Ranking (U)nits/\$ | | \$ | Signature Required/Default? | | Y / Y (Y/N) |
| Orders/Packing Slips Offer | | Y | Print Labels | | N (Y/N) |
| Quotes Offer/Delete/Default | | Y / Y / Y | Question on Auto Email | | 4 (1,2,3,4) |
| Price File Path | | /usr2/data1/temp | Invoice Qty (F11) Key Use | | I (W/I) |
| User Price File Path | | | 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"/> | | <input type="button" value="i"/> Bill To <input type="text" value="000365 CANADIAN TRUCK"/> | | Tue May 10 2022 13:47:31 | |
| CANADIAN TRUCK REPAIR 3879 RAILWAY AVE | | <input type="button" value="Ship Via"/> <input type="button" value="Notify"/> <input type="button" value="Salesman"/> | | GERRY JONES | |
| VANCOUVER BC | | <input type="button" value="GST Lic. #"/> <input type="button" value="PST Lic. #"/> | | ON FILE 12345678 | |
| V5X 2P2 Phone <input type="text" value="(780) 888-3244"/> | | <input type="button" value="FOB"/> <input type="button" value="PO #"/> <input type="button" value="Clerk #"/> | | 3 CLERK #3 | |
| line | type | Part Number | Description | Quantity | Eco Fee |
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |
| 6 | | | | | |
| <input type="button" value="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 \$ | |
| | | <input type="button" value="Was On"/> | | Current | |
| | | <input type="button" value="Credit Rating"/> | | 30 days | |
| | | <input type="button" value="Cr. \$ Limit"/> | | 60 days | |
| | | | | 90 days | |
| | | | | Dating | |
| | | | | Total Due | |
| | | | | Sub Total | |
| | | | | +/- % | |
| | | | | Provincial Tax | |
| | | | | Freight Charges | |
| | | | | G.S.T. | |
| | | | | TOTAL | |
| Message Window | | | | | |
| OPQ present: view A/O/P/Q/N ? N | | | | | |
| F1 | <input type="button" value="Back to Menu"/> | F3 | <input type="button" value="Recall Invoice"/> | F5 | <input type="button" value="Catalogue"/> |
| F2 | <input type="button" value="Invoice History"/> | F4 | <input type="button" value="Close P/Ticket"/> | F6 | <input type="button" value="Suspended Tr."/> |
| F3 | <input type="button" value="Cust. Info"/> | F5 | <input type="button" value="QUICKSCAN"/> | F7 | <input type="button" value="P/Ticket Inq."/> |
| F4 | <input type="button" value="Branch Inq."/> | F6 | <input type="button" value="Find Product"/> | F8 | <input type="button" value="Cust. Notes"/> |
| F5 | <input type="button" value="Phone Lookup"/> | F7 | <input type="button" value="Find Product"/> | F9 | <input type="button" value="Cust. Notes"/> |
| F6 | <input type="button" value="Find Product"/> | F8 | <input type="button" value="Cust. Notes"/> | F10 | <input type="button" value="Find Product"/> |
| F7 | <input type="button" value="Cust. Notes"/> | F9 | <input type="button" value="Find Product"/> | F11 | <input type="button" value="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]