

# 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 # 000365

000365 CANADIAN TRUCK

Tue May 10 2022 13:47:31

CANADIAN TRUCK REPAIR

3879 RAILWAY AVE

VANCOUVER BC

V5X 2P2

Phone (780) 888-3244

Bill To 000365 CANADIAN TRUCK

Ship Via

Notify GERRY JONES

Salesman

GST Lic. # ON FILE

PST Lic. # 12345678

FOB

PO #

Clerk # 3 CLERK #3

Payment Method

Transaction Type

line	type	Part Number	Description	Quantity	Eco Fee	Core	plv	Net Price	+/-%	Extension	tax
1											
2											
3											
4											
5											
6											

Customer Status

Invoice Summary

ShipTo Code 0 Fax # (780) 888-3003

Last Payment \$

Current

30 days

60 days

90 days

Dating

Total Due

Was On

Credit Rating

Cr. \$ Limit

Sub Total

+/- %

Provincial Tax

Freight Charges

G.S.T.

TOTAL

OPQ present: view A/O/P/Q/N ? N

F1 Back to Menu

F2 Recall Invoice

F3 Catalogue

F4 Invoice History

F5 Close P/Ticket

F6 Cust. Info

F7 QUICKSCAN

F8 Branch Inq.

F9 Suspended Tr.

F10 P/Ticket Inq.

F11 Find Product

F12 Cust. Notes

F13 Phone Lookup

F14

F15

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]