

How To Create An Invoice For A Customer

- 1 Select the "Connect" menu option.

The screenshot shows the TPI PARTSLINK Sellers Dashboard. On the left sidebar, the 'Connect' menu option is highlighted with a red circle. The main content area displays the 'Sales Information' section, which includes a 'Sales' summary with a 'More Details' button and a 'Past 30 days' filter. The 'Sales' summary shows: Sales (less returns) * at \$8,308.00, Returns * at \$28,570.00, Items Sold ** at 21, and Your Sales * at \$-26,290.00. Below this is an 'Exposures' section with a 'Go to Exposures' button. On the right, the 'Inventory' section is partially visible, showing 'Currently Displayed Parts' and 'Currently Displayed Trucks/Trailers' both at 0. A semi-transparent box with the text 'Loading inventory information' is overlaid on the inventory section.

Sellers Dashboard

Looks like you don't have any credits. Your parts will not display to the public until you [purchase credits](#) for your account.

Sales Information

Sales [More Details](#) [Past 30 days](#)

\$ Sales (less returns) * \$8,308.00	\$ Returns * \$28,570.00
Items Sold ** 21	\$ Your Sales * \$-26,290.00

*Does not include tax or core charge
**Includes other and non-stock items

Exposures [Go to Exposures](#)

Inventory [Manage Inventory](#)

Currently Displayed Parts 0	Currently Displayed Trucks/Trailers 0
Public Active Parts 0	Public Active Trucks/Trailers 0
Average Parts Content Rank Unknown	Total Parts Inventory Value \$0.00

Loading inventory information

2 Click "New Quote/Invoice"

Sellers Dashboard

Looks like you don't have any credits. Your parts will not display to the public until you [purchase credits](#) for your account.

Sales Information

Sales [More Details](#)

Past 30 days

Sales (less returns) *	Returns *
\$8,308.00	\$28,570.00
Items Sold **	Your Sales *
21	\$-26,290.00

*Does not include tax or core charge
**Includes other and non-stock items

Exposures [Go to Exposures](#)

[Purchase Credits](#)

Inventory

[Manage Inventory](#)

Currently Displayed Parts	Currently Displayed Trucks/Trailers
0	0
Public Active Parts	Public Active Trucks/Trailers
0	0
Average Parts Content Rank	Total Parts Inventory Value
Unknown	\$0.00

Loading inventory information

3 As on the other pages with TPI, any fields with bolded titles are required fields. If a field is not bolded, then it is optional to fill out.

Truck Parts Inventory / Sellers / Companies / Add Quote

Add Quote

Company / Contact

Company

Contact

Information

Sales Person <input type="text" value="Stacey Bjornsson"/>	Payment Method <input type="text" value="Cash"/>
PO # <input type="text"/>	Payment Notes <input type="text"/>
Ship Via <input type="text"/>	Quoted On <input type="text" value="2025-01-22 15:51"/>
Labels <input type="text"/>	Quote Expires <input type="text" value="2025-02-21 [30 Days]"/>
Commission <input type="text" value="Value"/> <input type="checkbox"/> Private	Setting <input type="text" value="Default"/>
	Warranty <input type="text" value="Value"/> <input type="checkbox"/> Public

Bill To	Ship To	Notes	Private Notes
522 63rd Street Edmonton, AB Canada 780-233-5182	522 63rd Street Edmonton, AB Canada 780-233-5182		

4

Select the Company field to search for existing companies in your system. Settings will default to "Cash Customer".

Truck Parts Inventory / Sellers / Companies / Add Quote

Add Quote

Company / Contact

Company: Cash Customer

Contact:

Information

Sales Person:

PO #:

Ship Via:

Labels: ?

Commission: Value Private ☐

Quote Expires: 2025-02-21 [30 Days]

Setting: Default

Warranty: Value Public ☐

Bill To

522 63rd Street
Edmonton, AB Canada
780-233-5182

Ship To

522 63rd Street
Edmonton, AB Canada
780-233-5182

Notes ?

Private Notes

5

You can "quick edit" a company using the button to the right of the text bar. Please note this also changes the information on the company profile. You can also "quick add" a new company using the "+" button.

Truck Parts Inventory / Sellers / Companies / Add Quote

Add Quote

Company / Contact

Company: Stacey Test Customer

Contact: Search name, phone, or email

Information

Sales Person: Stacey Bjornsson

PO #:

Ship Via:

Labels: ?

Commission: Value Private ☐

Payment Method: Cash

Payment Notes:

Quoted On: 2025-01-22 15:51

Quote Expires: 2025-02-21 [30 Days]

Setting: Default

Warranty: Value Public ☐

Bill To

1113333333

Ship To

1113333333

Notes ?

Private Notes

Item	Price	Quantity	Line Total	Tax
------	-------	----------	------------	-----

6

In the "quick edit" option, you can update items such as the Company's billing and/or shipping address, default payment settings, and more. Adding in this information will help staff to make quicker transactions in the future.

General Info

Name: Stacey Test Customer

Phone Number: 1113333333

Email:

Website:

Notes:

Sales Tax

Business Number:

Tax Code: Use Default Tax Settings

Payment Options

☒ Accept House Charge Payments

☒ Accept Check Payments

☒ Accept Other Payments

Transaction Options

☒ Allow Invoicing

☒ Allow Sales Receipt

☒ Allow Credit Notes

☐ Allow Automatic Invoice Email

Bill To Address

Address:

City:

State/Province:

Zip/Postal Code:

Ship To Address ☒ Same as billing address

Address:

City:

State/Province: Choose

Zip/Postal Code:

7

You can select which Sales Person made the sale from your company.

Truck Parts Inventory / Sellers / Companies / Add Quote

Add Quote

Company / Contact

Company: Stacey Test Customer

Contact: Search name, phone, or email

Information

Sales Person: Stacey Bjornsson

PO #:

Ship Via:

Labels:

Commission: Value Private

Payment Method: Cash

Payment Notes:

Quoted On: 2025-01-22 15:51

Quote Expires: 2025-02-21 [30 Days]

Setting: Default

Warranty: Value Public

Bill To **Ship To**

1113333333 1113333333

Notes **Private Notes**

Item Price Quantity Line Total Tax

8

You may choose to attach a label to your invoice to better filter/track certain transactions. An example of a label some companies may use is if they wanted to track the industries they're doing business with, they may add a label such as "agriculture", "waste management", etc.

Sellers

- Post
- Seek
- Connect
- Profit

Company / Contact

Company: Stacey Test Customer

Contact: Search name, phone, or email

Information

Sales Person: Stacey Bjornsson

PO #:

Ship Via:

Labels:

Commission: Value Private

Payment Method: Cash

Payment Notes:

Quoted On: 2025-01-22 15:51

Quote Expires: 2025-02-21 [30 Days]

Setting: Default

Warranty: Value Public

Bill To 1113333333 **Ship To** 1113333333

Notes **Private Notes**

Item Price Quantity Line Total Tax

Quick Search... Search - of -

Stacey B

9

If you are just creating a quote, you do not need to input a Payment Method. If you are taking payment for the sale at this point, then you will need to select the Payment Method.

Truck Parts Inventory / Sellers / Companies / Add Quote

Add Quote

Company / Contact

Company: Stacey Test Customer

Contact: Search name, phone, or email

Information

Sales Person: Stacey Bjornsson

PO #:

Ship Via:

Labels: ?

Commission: Value Private

Payment Method: Cash

Payment Notes:

Quoted On: 2025-01-22 15:51

Quote Expires: 2025-02-21 [30 Days]

Setting: Default

Warranty: Value Public

Bill To 1113333333 **Ship To** 1113333333

Notes **Private Notes**

Item Price Quantity Line Total Tax

10

Company / Contact

Company: Stacey Test Customer

Contact: Search name, phone, or email

Information

Sales Person: Stacey Bjornsson

PO #:

Ship Via:

Labels: Select from existing labels or enter new labels

Commission: Value Private

Payment Method: Debit Card

Payment Notes:

Quoted On: 2025-01-22 15:51

Quote Expires: 2025-02-21 [30 Days]

Setting: Default

Warranty: Value Public

Bill To 1113333333 **Ship To** 1113333333

Notes **Private Notes**

Item	Price	Quantity	Line Total	Tax
Quick Search... Search - or -				

+ Add Gravy Part + Add Inventory Item

11

You can search your inventory using the "Quick Search" field to add items to the quote/invoice.

Post

Seek

Connect

\$ Profit

Labels: Select from existing labels or enter new labels

Commission: Value Private

Quote Expires: 2025-02-21 [30 Days]

Setting: Default

Warranty: Value Public

Bill To 1113333333 **Ship To** 1113333333

Notes **Private Notes**

Item	Price	Quantity	Line Total	Tax
Quick Search... Search - or -				

+ Add Gravy Part + Add Inventory Item

Subtotal \$0.00

Add Shipping

Total Tax \$0.00

Total \$0.00

Reset Save Invoice Sales Receipt

Reset this quote.

Save this quote. Once saved, you'll be able to print, email, save as pdf.

Save and invoice this quote.

Save and create a sales receipt for this quote.

12

First you type in a keyword for the item you are seeking, then choose the category it is associated with.

Labels: Select from existing labels or enter new labels ?

Setting: Default

Commission: Value Private x

Warranty: Value Public

Bill To: 1113333333

Ship To: 1113333333

Notes

Private Notes

Item	Price	Quantity	Line Total	Tax
bumper				
Subtotal				\$0.00
Total Tax				\$0.00
Total				\$0.00

Reset: Reset this quote.

Save: Save this quote. Once saved, you'll be able to print, email, save as pdf.

Invoice: Save and invoice this quote.

Sales Receipt: Save and create a sales receipt for this quote.

Feedback

13

You will then be brought to selection of related items, and can choose with one(s) you would like to add to the quote/invoice.

Part Type: search Part Types

Bumpers: 228

Truck Equipment/Accessories: 10

Moose Bumpers

Good

Stock #TR12111111212566969-1: \$2,000.00 QTY: 1

Good

Stock #59915245612355896: \$333.00 QTY: 1

it's a bumper

Stock #59915245612355893: No price set QTY: 1

Phone test

Stock #TR12111111212566958-12: No price set QTY: 1

Ndndh

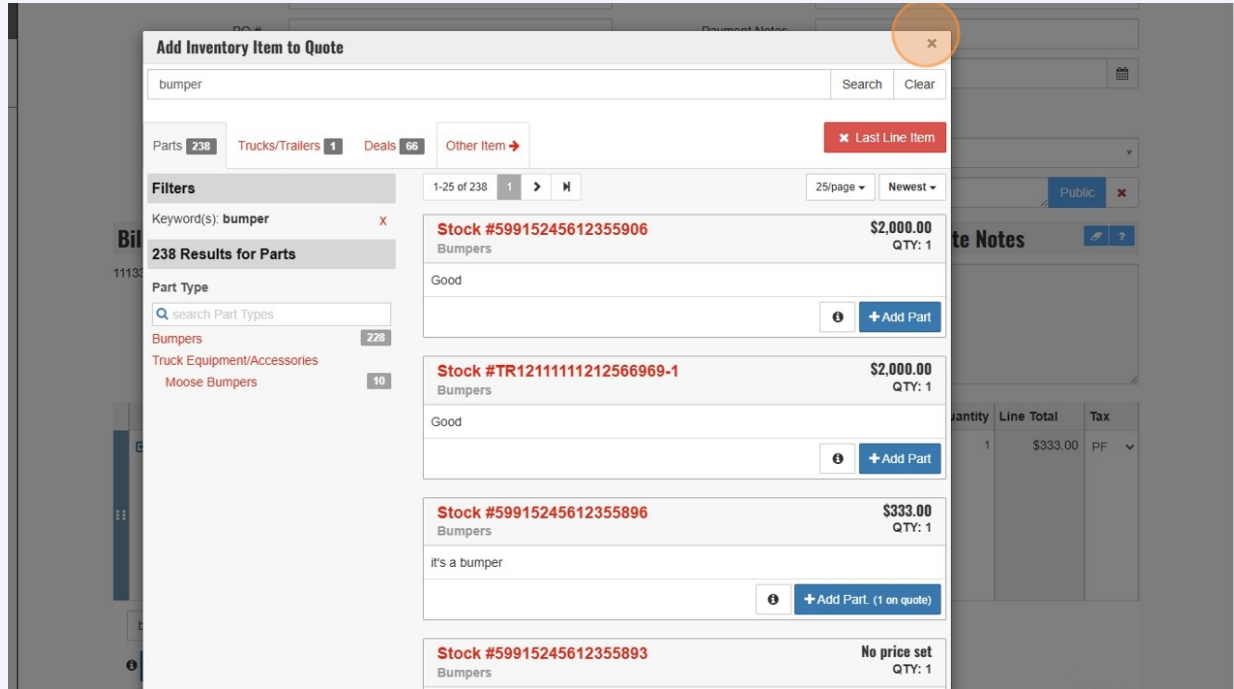
Stock #TR12111111212566958-1: \$5,555.00 QTY: 1

Notes

Quantity	Line Total	Tax
	\$0.00	
	\$0.00	
	\$0.00	

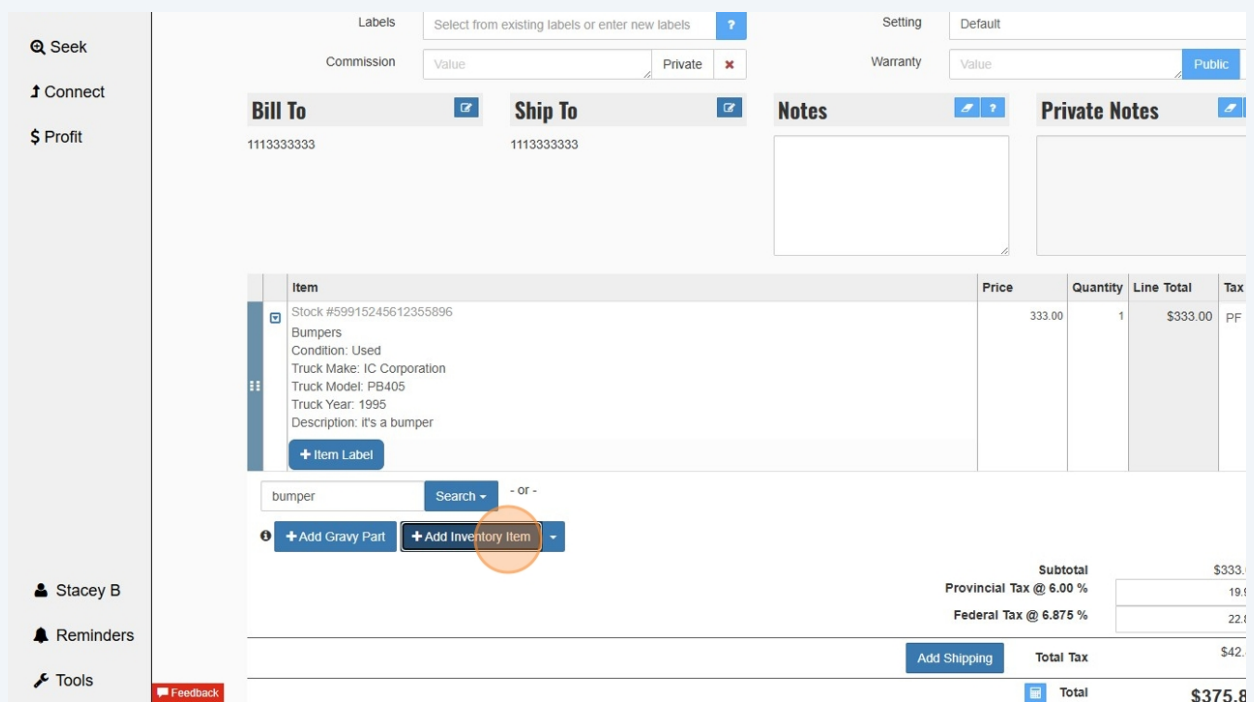
14

You can add multiple items to an invoice at once. To close the inventory search window, simply click off the window, on the invoice or select the "x" in the top right.



15

You can also search your inventory by clicking "Add Inventory Item".



16

You can search your inventory and add multiple parts on this screen. Then click off the window to return to the quote/invoice.

Stock #TR12111111212566969-2 \$3,000.00 QTY: 1
Cab & Cab Parts / Cabs
Good
[+ Add Part](#)

Stock #TR12111111212566969-1 \$2,000.00 QTY: 1
Bumpers
Good
[+ Add Part](#)

Stock #TR12111111212566969 No price set QTY: 1
Trucks for Parts
Good condition
[+ Add Part](#)

Stock #TR12111111212566968-1 \$2,000.00 QTY: 1
Cab & Cab Parts / Cabs
Good
[+ Add Part](#)

Stock #59915245612355904 No price set QTY: 1
Cab & Cab Parts / Cabs
fgtsdft
[+ Add Part](#)

Quantity	Line Total	Tax
1	\$333.00	PF
1	\$250.00	PF

17

To add a part that is not currently listed in your TPI inventory, but is associated to a truck that is in your TPI inventory, select "Add Gravy Part".

Search
Connect
Profit

Item	Price	Quantity	Line Total	Tax
Stock #59915245612355896 Bumpers Condition: Used Truck Make: IC Corporation Truck Model: PB405 Truck Year: 1995 Description: It's a bumper + Item Label	333.00	1	\$333.00	PF
Stock #TR12111111212566969-3 Cab & Cab Parts / Ignition Switch Condition: Used Truck Make: Western Star Truck Model: 4700 VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022 Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707 + Item Label	250.00	1	\$250.00	PF

bumper Search - of -
[+ Add Gravy Part](#) [+ Add Inventory Item](#)

Subtotal	\$583.00
Provincial Tax @ 6.00 %	34.98
Federal Tax @ 6.875 %	40.00
Total Tax	\$75.00

Stacey B
Reminders
Tools
Feedback

[Add Shipping](#)

18 You will then find the Truck that the part is from, and select "Add Gravy Part".

Parts 3,455 Trucks/Trailers 978 Deals 66 Other Item →

Currently Wrecking Trucks [905] 1-25 of 978 1 25/page Newest

All Currently Wrecking Trucks

Truck Make

- Advance Mixer 24
- ALLIS CHALMERS 18
- American LaFrance 19
- Autocar 10
- BCI 9
- Bering 3
- Blue Bird 4
- BMY 1
- Caterpillar 1
- Chevrolet 21
- Clark 1
- Diamond Coach 1
- Diamond Reo 1
- Dodge 1
- Dulevo 1
- Ferrara 1
- Ford 28
- Freightliner 281
- GM/Chev (HD) 10
- GMC 8
- Grey Hound 1
- Hino 8
- Indiana Phoenix 1
- International 191
- Iveco 1
- Kenworth 44
- Mark 48

2022 Western Star 4700
Truck Lot Number: TR12111111212566969
Truck Parts ⓘ + Add Gravy Part

2023 ALLIS CHALMERS other
Truck Lot Number: TR12111111212566968
Truck Parts ⓘ + Add Gravy Part

2024 American LaFrance Military
Truck Lot Number: TR12111111212566967
Truck Parts ⓘ + Add Gravy Part

2020 American LaFrance Military
Truck Lot Number: TR12111111212566966
Truck Parts ⓘ + Add Gravy Part

2021 BCI FALCON
Truck Lot Number: TR12111111212566965
Truck Parts ⓘ + Add Gravy Part

2020 ALLIS CHALMERS other
Truck Lot Number: TR12111111212566964
Truck Parts ⓘ + Add Gravy Part

Quantity	Line Total	Tax
1	\$333.00	PF
1	\$250.00	PF
	\$583.00	
	34.98	
	40.08	
	\$75.06	

19 You can then edit the details associated with that "Gravy Part". You may type in what the part type is, such as "Mirrors".

Seek

Connect

Profit

Stacey B

Reminders

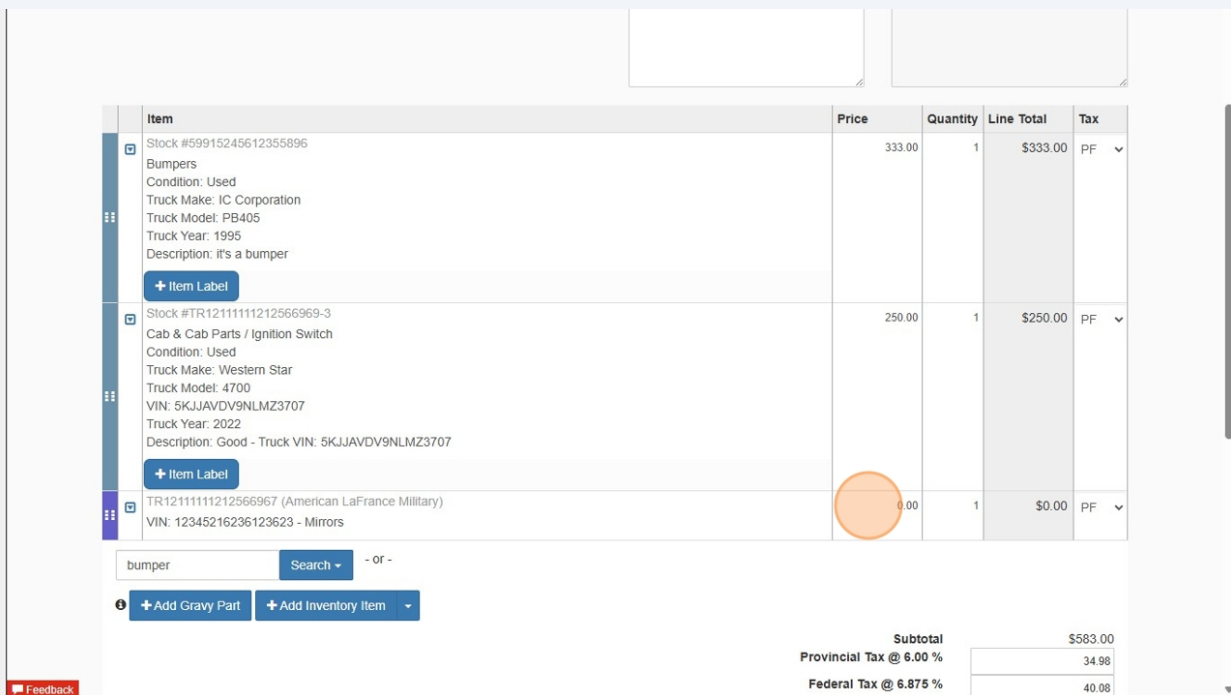
Tools

Feedback

Item	Price	Quantity	Line Total	Tax
Stock #59915245612355896 Bumpers Condition: Used Truck Make: IC Corporation Truck Model: PB405 Truck Year: 1995 Description: It's a bumper + Item Label	333.00	1	\$333.00	PF
Stock #TR12111111212566969-3 Cab & Cab Parts / Ignition Switch Condition: Used Truck Make: Western Star Truck Model: 4700 VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022 Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707 + Item Label	250.00	1	\$250.00	PF
TR12111111212566967 (American LaFrance Military) VIN: 12345216236123623 bumper Search - of - + Add Gravy Part + Add Inventory Item	0.00	1	\$0.00	PF

Subtotal \$583.00
Provincial Tax @ 6.00 % 34.98
Federal Tax @ 6.875 % 40.08

20 You can then adjust the price of the item.



Item	Price	Quantity	Line Total	Tax
<div> <div>Stock #59915245612355896</div> <div> <div>Bumpers</div> <div>Condition: Used</div> <div>Truck Make: IC Corporation</div> <div>Truck Model: PB405</div> <div>Truck Year: 1995</div> <div>Description: It's a bumper</div> </div> <div>+ Item Label</div> </div>	333.00	1	\$333.00	PF
<div> <div>Stock #TR1211111212566969-3</div> <div> <div>Cab & Cab Parts / Ignition Switch</div> <div>Condition: Used</div> <div>Truck Make: Western Star</div> <div>Truck Model: 4700</div> <div>VIN: 5KJJAVDV9NLMZ3707</div> <div>Truck Year: 2022</div> <div>Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707</div> </div> <div>+ Item Label</div> </div>	250.00	1	\$250.00	PF
<div> <div>TR1211111212566967 (American LaFrance Military)</div> <div>VIN: 12345216236123623 - Mirrors</div> </div>	0.00	1	\$0.00	PF

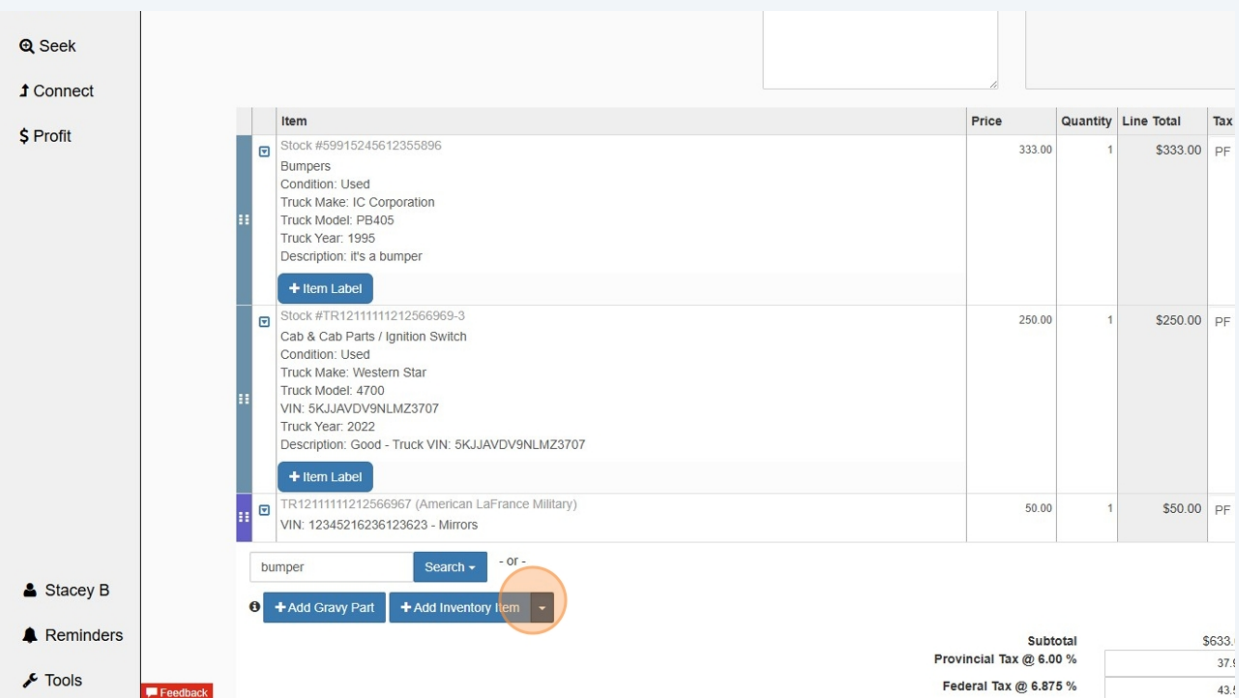
bumper Search - or -

+ Add Gravy Part + Add Inventory Item

Feedback

Subtotal \$583.00
Provincial Tax @ 6.00 % 34.98
Federal Tax @ 6.875 % 40.08

21 To view more quote/invoice item options, click the Toggle Dropdown menu.



Seek

Connect

\$ Profit

Stacey B

Reminders

Tools

Feedback

Item	Price	Quantity	Line Total	Tax
<div> <div>Stock #59915245612355896</div> <div> <div>Bumpers</div> <div>Condition: Used</div> <div>Truck Make: IC Corporation</div> <div>Truck Model: PB405</div> <div>Truck Year: 1995</div> <div>Description: It's a bumper</div> </div> <div>+ Item Label</div> </div>	333.00	1	\$333.00	PF
<div> <div>Stock #TR1211111212566969-3</div> <div> <div>Cab & Cab Parts / Ignition Switch</div> <div>Condition: Used</div> <div>Truck Make: Western Star</div> <div>Truck Model: 4700</div> <div>VIN: 5KJJAVDV9NLMZ3707</div> <div>Truck Year: 2022</div> <div>Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707</div> </div> <div>+ Item Label</div> </div>	250.00	1	\$250.00	PF
<div> <div>TR1211111212566967 (American LaFrance Military)</div> <div>VIN: 12345216236123623 - Mirrors</div> </div>	50.00	1	\$50.00	PF

bumper Search - or -

+ Add Gravy Part + Add Inventory Item

Subtotal \$633.00
Provincial Tax @ 6.00 % 37.98
Federal Tax @ 6.875 % 43.21

22 Click "Add other item" to add service type charges to a quote/invoice.

The screenshot shows a software interface with a sidebar on the left containing a search bar, a 'Connect' button, a '\$ Profit' button, and user information for 'Stacey B'. The main area displays a table of items with columns for Item, Price, Quantity, Line Total, and Tax. The items listed are:

Item	Price	Quantity	Line Total	Tax
Stock #59915245612355896 Bumpers Condition: Used Truck Make: IC Corporation Truck Model: PB405 Truck Year: 1995 Description: It's a bumper	333.00	1	\$333.00	PF
Stock #TR1211111212566969-3 Cab & Cab Parts / Ignition Switch Condition: Used Truck Make: Western Star Truck Model: 4700 VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022 Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707	250.00	1	\$250.00	PF
TR1211111212566967 (American LaFrance Military) VIN: 12345216236123623 - Mirrors	50.00	1	\$50.00	PF

Below the table is a search bar with the text 'bumper' and a 'Search' button. To the right of the search bar is a dropdown menu with the following options:

- + Add Gravy Part
- + Add Inventory Item
- + Add other item
- + Add non-stock item
- + Add discount

The 'Add other item' option is highlighted with an orange circle. To the right of the dropdown menu is a 'Subtotal' section with the following values:

Subtotal	
\$633.00	
Provincial Tax @ 6.00 %	37.98
Federal Tax @ 6.875 %	43.41

23 Here you might add charges for items like freight, labor, etc.

The screenshot shows a software interface with a sidebar on the left containing a search bar, a 'Connect' button, a '\$ Profit' button, and user information for 'Stacey B'. The main area displays a table of items with columns for Description, Price, Quantity, and Tax Code. The items listed are:

Description	Price	Quantity	Tax Code
Core Charge	\$500.00	1	E
Document Fee	\$35.00	1	
FREIGHT	\$0.00	1	
LABOUR	\$120.00	1	
Labour 1/2	\$60.00	1	
Oil Change	\$60.00	1	
Pre-TPI Truck Parts	\$0.00	1	
Sales exchange rates	\$0.00	1	
Shipping	\$0.00	1	
Shipping Information	\$0.00	1	E
State Vehicle Tax Maximum	\$300.00	1	

Below the table is a search bar with the text 'bumper' and a 'Search' button. To the right of the search bar is a dropdown menu with the following options:

- + Add to quote
- + Add to quote
- + Add to quote
- + Add to quote
- + Add to quote
- + Add to quote
- + Add to quote
- + Add to quote
- + Add to quote
- + Add to quote

The 'Add to quote' option is highlighted with an orange circle. To the right of the dropdown menu is a 'Subtotal' section with the following values:

Subtotal	
\$633.00	
Provincial Tax @ 6.00 %	37.98
Federal Tax @ 6.875 %	43.41

24 Click "Add non-stock item" to add a sale item that is not associated with anything in your TPI trucks and parts inventory.

 Seek

↑ Connect

\$ Profit

 Stacey B

Reminders

 Tools

Feedback


25 Remember to click into the details field when adding non-stock items or other line items with limited information. Add in relevant details.

 Seek

↑ Connect

\$ Profit

 Stacey B

 Reminders

 Tools

Feedback

26 Adjust the price and quantity as necessary.

Truck Make: IC Corporation Truck Model: PB405 Truck Year: 1995 Description: it's a bumper + Item Label					
Stock #TR1211111212566969-3 Cab & Cab Parts / Ignition Switch Condition: Used Truck Make: Western Star Truck Model: 4700 VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022 Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707 + Item Label	250.00	1	\$250.00	PF	▼
TR1211111212566967 (American LaFrance Military) VIN: 12345216236123623 - Mirrors	50.00	1	\$50.00	PF	▼
LABOUR	120.00	1	\$120.00	PF	▼
Wrench	40.00	1	\$40.00	PF	▼

[Search](#) - or -
[+ Add Gravy Part](#) [+ Add Inventory Item](#)

Subtotal \$753.00
Provincial Tax @ 6.00 % 45.18
Federal Tax @ 6.875 % 51.77

[Add Shipping](#) Total Tax \$96.95

[Total](#) **\$849.95**

[Feedback](#)

27 You may also choose to add a Section Header or a Sub total if invoices are quite lengthy. This will help make them more easy to read.

[Seek](#)
[Connect](#)
[Profit](#)

[Stacey B](#)
[Reminders](#)
[Tools](#)

Truck Make: IC Corporation Truck Model: PB405 Truck Year: 1995 Description: it's a bumper + Item Label					
Stock #TR1211111212566969-3 Cab & Cab Parts / Ignition Switch Condition: Used Truck Make: Western Star Truck Model: 4700 VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022 Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707 + Item Label	250.00	1	\$250.00	PF	
TR1211111212566967 (American LaFrance Military) VIN: 12345216236123623 - Mirrors	50.00	1	\$50.00	PF	
LABOUR	120.00	1	\$120.00	PF	
Wrench	40.00	1	\$40.00	PF	

[Search](#) - or -
[+ Add Gravy Part](#) [+ Add Inventory Item](#)

[+ Add other item](#)
[+ Add non-stock item](#)
[+ Add discount](#)
[+ Add section header](#)
[+ Add subtotal](#)

Subtotal \$793.00
Provincial Tax @ 6.00 % 47.58
Federal Tax @ 6.875 % 54.12

[Add Shipping](#) Total Tax \$102.00

[Total](#) **\$895.10**

[Feedback](#)

28

You can adjust tax settings on each item being charged for. This is help if some items are tax exempt and some are not.

Commission Private ☒ Warranty Public ☒

Bill To **Ship To** **Notes** **Private Notes**

Item	Price	Quantity	Line Total	Tax
<input checked="" type="checkbox"/> Stock #59915245612355896 Bumpers Condition: Used Truck Make: IC Corporation Truck Model: PB405 Truck Year: 1995 Description: It's a bumper <input type="button" value="+ Item Label"/>	333.00	1	\$333.00	E <input type="button" value="v"/>
<input checked="" type="checkbox"/> Stock #TR12111111212566969-3 Cab & Cab Parts / Ignition Switch Condition: Used Truck Make: Western Star Truck Model: 4700 VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022 Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707 <input type="button" value="+ Item Label"/>	250.00	1	\$250.00	PF <input type="button" value="v"/>
<input checked="" type="checkbox"/> TR12111111212566967 (American LaFrance Military) VIN: 12345216236123623 - Mirrors	50.00	1	\$50.00	PF <input type="button" value="v"/>
<input checked="" type="checkbox"/> LABOUR	120.00	1	\$120.00	PF <input type="button" value="v"/>

29

If you are simply making a Quote (and not an invoice or sale), then select "save".

Post
Seek
Connect
Profit

Stacey B
Reminders
Tools

Subtotal - of -

Subtotal	\$793.00
Provincial Tax @ 6.00 %	27.60
Federal Tax @ 6.875 %	31.63
Total Tax	\$59.23
Total	\$852.23

Reset this quote. Save this quote. Once saved, you'll be able to print, email, save as pdf. Save and invoice this quote. Save and create a sales receipt for this quote.

BUY PARTS
 Search For Parts
 Parts Request
 Buyer Signup

SELL PARTS
 TPI Features
 Plans & Pricing
 Become A Seller

RESOURCES
 Facebook Group
 Newsletter
 Feedback

COMPANY
 About Us
 Contact Us
 Terms & Privacy

f t in o

30

If you are committing to the sale, but are **not** processing payment at this point in time, select "Invoice".

If you **are** processing payment at time of creating invoice, select "Sales Receipt" and complete the transaction.

Subtotal

Quick Search... Search - Or -

+ Add Gravy Part + Add Inventory Item

Subtotal \$793.00

Provincial Tax @ 6.00 % 27.6

Federal Tax @ 6.875 % 31.63

Add Shipping Total Tax \$59.23

Total \$852.23

Reset Save Invoice Sales Receipt

Reset this quote. Save this quote. Once saved, you'll be able to print, email, save as pdf. Save and invoice this quote. Save and create a sales receipt for this quote.

Void

Save any changes and void this Quote.

BUY PARTS SELL PARTS RESOURCES COMPANY

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If you are creating an invoice, it will give you a window to select when the invoice payment is due by.

Confirm Invoice - Options

The payment due date is optional and will show on invoice to customer. If you do choose a payment due date - this will also affect your Accounts Receivable Aging Report.

Payment Due Date

Please confirm this quote is ready to be invoiced and then click the "Confirm and Sell" button below when you are ready to finalize this invoice.

Cancel **Confirm and Sell**

Subtotal \$793.00
 Provincial Tax @ 6.00 %
 Federal Tax @ 6.875 %
 Total Tax \$59.20
 Total \$852.20

Reset Save Invoice Sales Receipt Void

32

Once an invoice is created, this is what it will look like. You can then add a payment to it by selecting the "+ Payment" option in the top menu.

TPI PARTSLINK

Truck Parts Inventory / Sellers / Companies / Stacey Test Customer / Invoice 2548

Invoice 2548

Stacey Test Customer Balance: \$1,669.61

Primary
1113333333

Overview Print Options Email **+ Payment** Credits Attachments More Options

Void Sale Information
 This sale can be voided up to 24 hours from when it was created.
 Voiding will be disabled during this time period if a payment tracking record, or a credit note has occurred for this transaction.

Invoice 2548

Sales Person	Stacey Bjornsson	Payment Method	Debit Card
Payment Due	2025-01-31		
Sold On	January 22, 2025		

Bill To
 Stacey Test Customer
 1113333333

Ship To
 Stacey Test Customer
 1113333333

Items	Price	Quantity	Line Total	Tax
-------	-------	----------	------------	-----

33 Ensure all fields are correct and you adjust the proper payment type.

Truck Parts Inventory / Sellers / Companies / Stacey Test Customer / Add Payment

Add Payment

Stacey Test Customer Balance: \$1,669.61

Primary
1113333333

Reference No. 2548P

Receivables Due \$852.23

Amount 852.23

Payment Method Manually Entered Card Data

Payment Date 2025-01-22 15:55

Issued By Stacey Bjornsson

Check/Auth No. (optional)

Notes (optional)

Date	Invoice	Original Total	Credit Notes Total	Amount Due	Payment
22 Jan 2025	2548	\$852.23	\$0.00	\$852.23	852.23

Show All Outstanding Transactions

34 Click "Save Payment"

Primary
1113333333

Reference No. 2548P

Receivables Due \$852.23

Amount 852.23

Payment Method Credit

Payment Date 2025-01-22 15:55

Issued By Stacey Bjornsson

Check/Auth No. (optional)

Notes (optional)

Date	Invoice	Original Total	Credit Notes Total	Amount Due	Payment
22 Jan 2025	2548	\$852.23	\$0.00	\$852.23	852.23

Show All Outstanding Transactions

Totals \$852.23 \$0.00 \$852.23 \$852.23

Discounts

Cancel Save Payment Pay With Debit/Credit Card

Feedback Action List 2

- 35 You can see the invoice now shows that the total amount has been paid.

Payment

Successfully saved the transaction. ✕

Stacey Test Customer Balance: \$817.38

Primary
1113333333

Print PDF Email Edit Void

2548P 22 January 2025 **852.23**

Issued By: Stacey Bjornsson
Payment Method: Credit
Billed To: Stacey Test Customer

Allocations

Type		Date	Allocated
Invoice -	2548	22 January 2025	852.23
Total Paid			852.23

BUY PARTS SELL PARTS RESOURCES COMPANY

Feedback Action List 2

- 36 You can then select to do actions such as email or print the payment transaction.

Truck Parts Inventory / Sellers / Companies / Stacey Test Customer / Payment

Payment

Successfully saved the transaction. ✕

Stacey Test Customer Balance: \$817.38

Primary
1113333333

Print PDF Email Edit Void

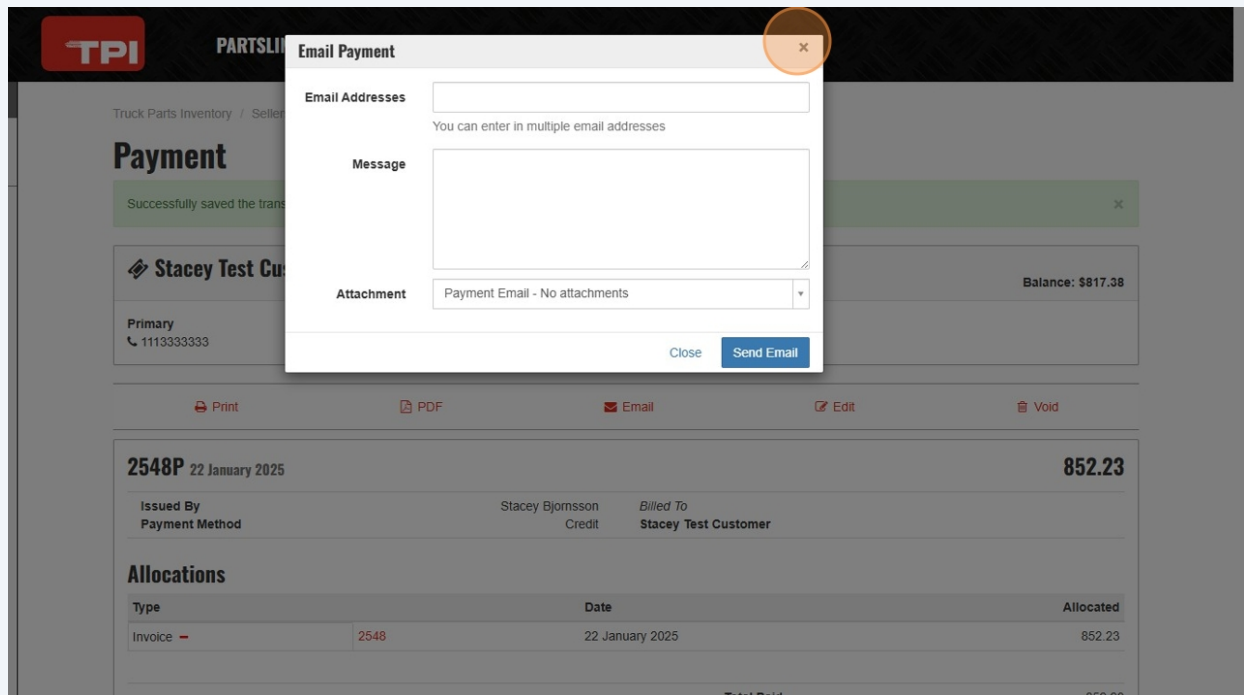
2548P 22 January 2025 **852.23**

Issued By: Stacey Bjornsson
Payment Method: Credit
Billed To: Stacey Test Customer

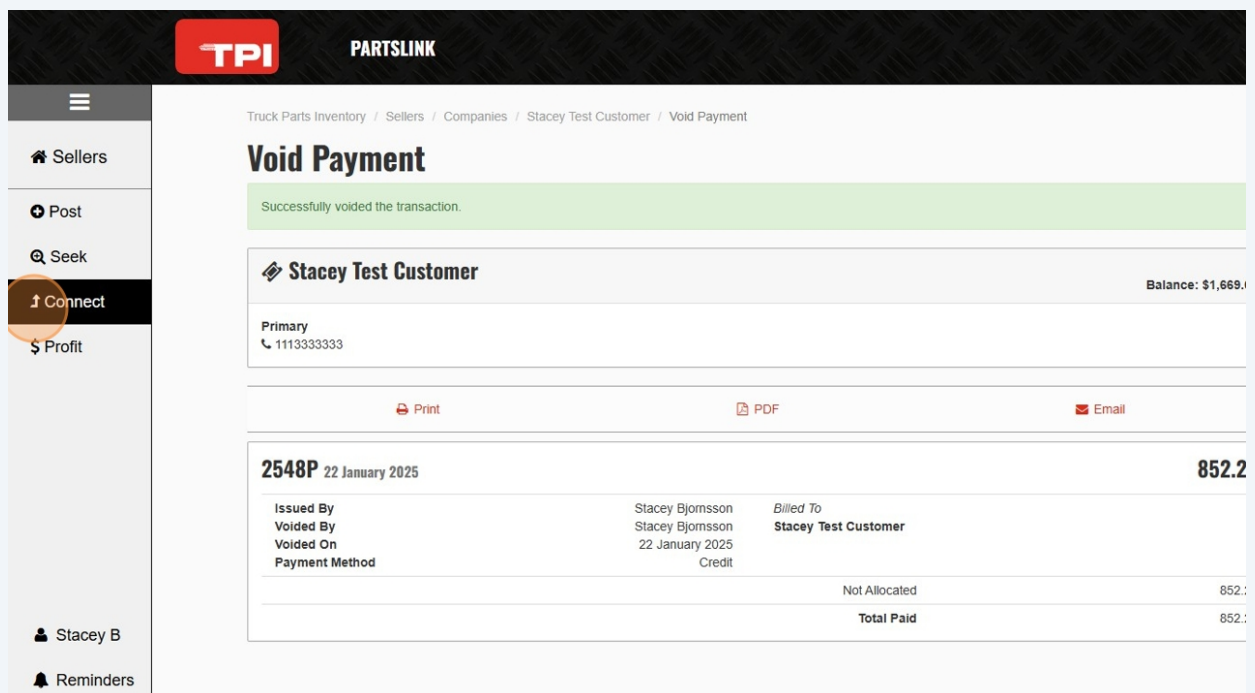
Allocations

Type		Date	Allocated
Invoice -	2548	22 January 2025	852.23
Total Paid			852.23

37 Here is what the option to email the payment looks like.



38 If you want to search for previous quote, invoice or sales receipt, select the Connect menu option



39 Click "Sales Overview"

Truck Parts Inventory / Sellers / Companies / Stacey Test Customer / Void Payment

Void Payment

Successfully voided the transaction.

Stacey Test Customer Balance: \$1,669.00

Primary
1113333333

Print PDF Email

2548P 22 January 2025 **852.2**

Issued By	Stacey Bjornsson	Billed To	Stacey Test Customer
Voided By	Stacey Bjornsson		
Voided On	22 January 2025		
Payment Method	Credit		
		Not Allocated	852.2
		Total Paid	852.2

40 You can search by the ID number, company name, or use the filters to narrow down by transaction type, date period, etc.

Truck Parts Inventory / Sellers / Sales Overview

Sales Overview

Dec 24, 2024 - Jan 22, 2025 Types Paid/Unpaid Transaction Labels

Search x Search Companies Advanced

ID	Status	Company	Contact	Sales Person	Labels	Date	Total	Options
2548	Invoice	Stacey Test Customer		Stacey Bjornsson		22 Jan 2025	\$852.23	
2547	Invoice	Stacey Test Customer		Dana George		21 Jan 2025	\$1,128.75	
CN43	Credit Note	ABC Markets	Jim Hardy	Scott Tetz		16 Jan 2025	\$282.19	
2546	Invoice	Terra		Adrian Chan		16 Jan 2025	\$564.38	
2545	Invoice	Stacey Test Customer		Stacey Bjornsson		15 Jan 2025	\$338.63	
1408C	Credit Note	Cash Customer		Stacey Bjornsson		09 Jan 2025	\$27,090.00	
25-43	Sales Receipt	Bell Markets		Scott Tetz		04 Jan 2025	\$451.50	
Q1423	Quote	Advansed Teksyzte...	Jim Hardy	Scott Tetz		04 Jan 2025	\$1,241.63	
2544	Sales Receipt	Jackpot Consultant		Scott Tetz		04 Jan 2025	\$564.38	
2543	Invoice	Circuit City		Scott Tetz		04 Jan 2025	\$1,692.00	
1379C	Credit Note	Cash Customer		Dana George		04 Jan 2025	\$11.29	
1403C	Credit Note	AdventureSportsI		Stacey Bjornsson		04 Jan 2025	\$564.38	
1417C	Credit Note	A. L. Price		Stacey Bjornsson		03 Jan 2025	\$564.38	
I1422	Invoice	Cash Customer		Adrian Chan		02 Jan 2025	\$0.00	

41

To search for transactional history specific to a company, you can also do that by first selecting "Connect".

Truck Parts Inventory / Sellers / Sales Overview

Sales Overview

Dec 24, 2024 - Jan 22, 2025

Types ▾ Paid/Unpaid ▾ Transaction Labels ▾

Search × ▾ Stacey Test Customer × ▾ Advanced ▾

ID ▾	Status ▾	Company ▾	Contact ▾	Sales Person ▾	Labels ▾	Date ▾	Total ▾	Options ▾
2548	Invoice	Stacey Test Customer		Stacey Bjornsson		22 Jan 2025	\$852.23	
2547	Invoice	Stacey Test Customer		Dana George		21 Jan 2025	\$1,128.75	
2545	Invoice	Stacey Test Customer		Stacey Bjornsson		15 Jan 2025	\$338.63	

Stacey B Reminders

First Previous Page 1 of 1 Next Last 20

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Then select "Companies"

Truck Parts Inventory / Sellers / Sales Overview

Sales Overview

Dec 24, 2024 - Jan 22, 2025

Types ▾ Paid/Unpaid ▾ Transaction Labels ▾

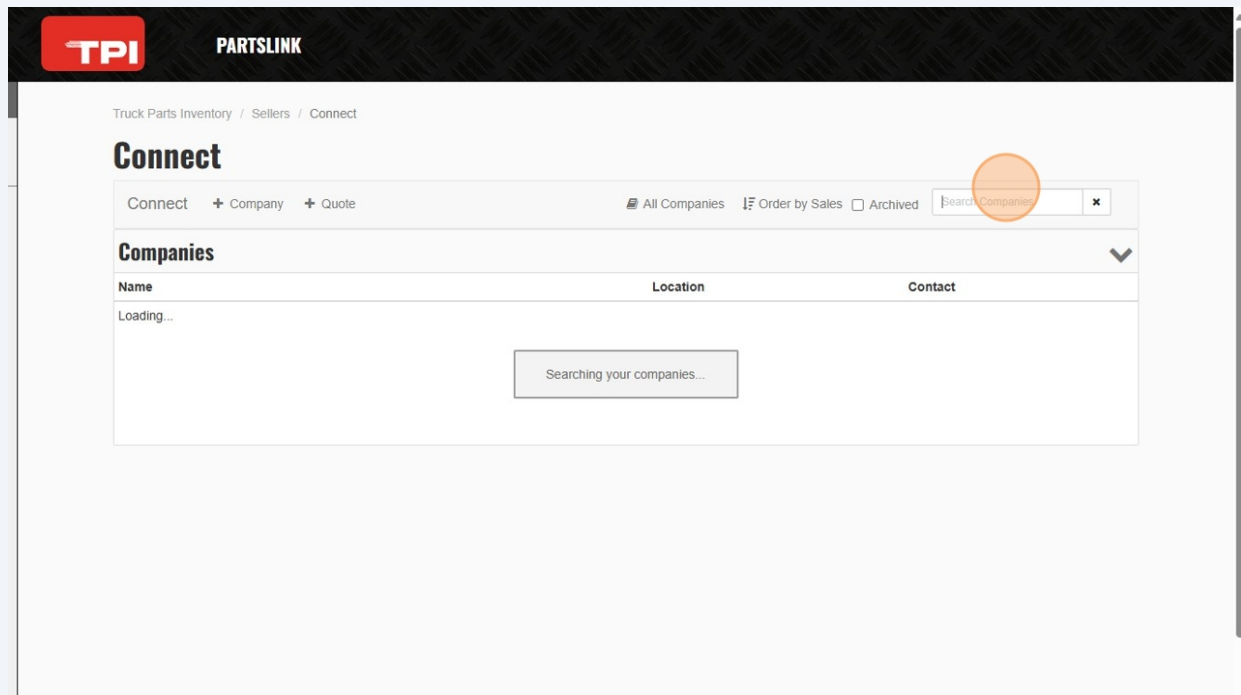
Search × ▾ Stacey Test Customer × ▾ Advanced ▾

ID ▾	Status ▾	Company ▾	Contact ▾	Sales Person ▾	Labels ▾	Date ▾	Total ▾	Options ▾
2548	Invoice	Stacey Test Customer		Stacey Bjornsson		22 Jan 2025	\$852.23	
2547	Invoice	Stacey Test Customer		Dana George		21 Jan 2025	\$1,128.75	
2545	Invoice	Stacey Test Customer		Stacey Bjornsson		15 Jan 2025	\$338.63	

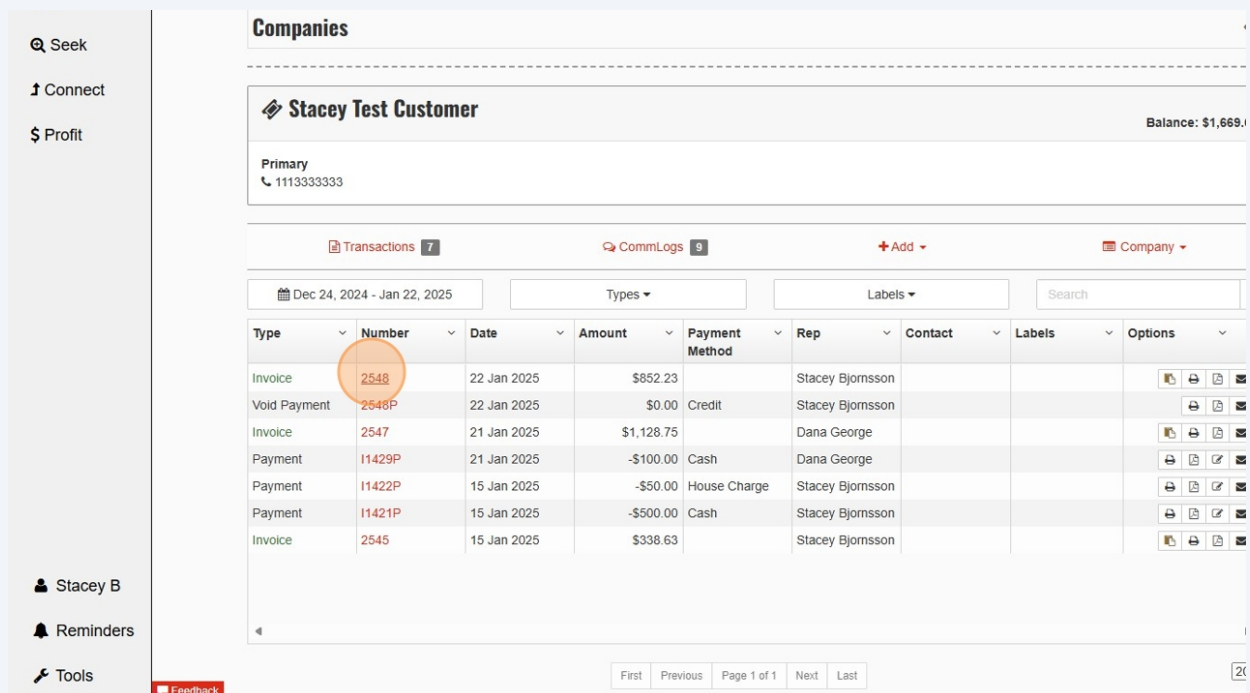
Commlogs Overview Sales Overview + New Quote/Invoice Orders Overview + New Purchase Order + New Item Receipt Cores Missed Sales

First Previous Page 1 of 1 Next Last 20

43 Search for the company you are looking for.



44 You can enter into any record by clicking the transaction number.



45

And you can view if it's been paid or not, and the full transaction details. This one has \$0.00 paid, so let's show you how to make a payment.

Truck Make: IC Corporation Truck Model: PB405 Truck Year: 1995 Description: It's a bumper				
Stock #TR12111111212566969-3 Cab & Cab Parts / Ignition Switch Condition: Used Truck Make: Western Star Truck Model: 4700 VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022 Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707	250.00	1	250.00	PF
Truck Item: TR12111111212566967 (American LaFrance Military) VIN: 12345216236123623 - Mirrors	50.00	1	50.00	PF
LABOUR	120.00	1	120.00	PF
Wrench	40.00	1	40.00	PF
Subtotal			793.00	
			Subtotal	793.00
			Provincial Tax @ 6.00 %	27.60
			Federal Tax @ 6.875 %	31.63
			Total Tax	59.23
			Total	\$852.23
			Paid	\$0.00
			Balance	\$852.23

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Action List 2

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Select the payment option in the top menu.

TPI

PARTSLINK

Truck Parts Inventory / Sellers / Companies / Stacey Test Customer / Invoice 2548

Invoice 2548

Stacey Test Customer

Balance: \$1,669.61

Primary

1113333333

Overview

Print Options

Email

+ Payment

Credits

Attachments

More Options

Void Sale Information

This sale can be voided up to 24 hours from when it was created.
Voiding will be disabled during this time period if a payment tracking record, or a credit note has occurred for this transaction.

Invoice 2548

Sales Person

Payment Due

Sold On

Stacey Bjornsson

2025-01-31

January 22, 2025

Payment Method

Debit Card

Bill To

Stacey Test Customer

1113333333

Ship To

Stacey Test Customer

1113333333

Items	Price	Quantity	Line Total	Tax
-------	-------	----------	------------	-----

47

Ensure all details are correct and you choose the correct payment method being used. The pie icon beside the payment amount will allow you to apply the payment amount to multiple invoices, if the customer has more than one outstanding invoice.

Stacey Test Customer
Balance: \$1,669.61

Primary
 1113333333

Reference No. 2548P1

Receivables Due \$852.23

Amount 852.23

Payment Method Manually Entered Card Data

Payment Date 2025-01-22 15:57

Issued By Stacey Bjornsson

Check/Auth No. (optional)

Notes (optional)

Date	Invoice	Original Total	Credit Notes Total	Amount Due	Payment
22 Jan 2025	2548	\$852.23	\$0.00	\$852.23	852.23
<div>Show All Outstanding Transactions</div>					
Totals		\$852.23	\$0.00	\$852.23	\$852.23

Discounts

Cancel

Save Payment

Pay With Debit/Credit Card

48

Click "Save Payment"

Stacey Test Customer
Balance: \$1,669.61

Primary
 1113333333

Reference No. 2548P1

Receivables Due \$852.23

Amount 852.23

Payment Method Cash

Payment Date 2025-01-22 15:57

Issued By Stacey Bjornsson

Check/Auth No. (optional)

Notes (optional)

Date	Invoice	Original Total	Credit Notes Total	Amount Due	Payment
22 Jan 2025	2548	\$852.23	\$0.00	\$852.23	852.23
<div>Show All Outstanding Transactions</div>					
Totals		\$852.23	\$0.00	\$852.23	\$852.23

Discounts

Cancel

Save Payment

Pay With Debit/Credit Card

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49 You can now see that the total paid has been updated.

Payment

Successfully saved the transaction.

 **Stacey Test Customer**

Balance: \$817.38

Primary

1113333333

 Print

 PDF

 Email

 Edit

 Void

2548P1 22 January 2025

852.23

Issued By
Payment Method

Stacey Bjornsson
Cash

Billed To
Stacey Test Customer

Allocations

Type		Date	Allocated
Invoice -	2548	22 January 2025	852.23

Total Paid

852.23


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