How To Create An Invoice For A Customer

	TPI PARTSLINK			
rs	Sellers Dashboard			
	🔺 Looks like you do	on't have any credits. Your parts will not di	isplay to the public until you purchase credits	for your accoun
	Sales Information			
ot	Sales	More Details O	Inventory	Mar
		Past 30 days ◄	Currently Displayed	G Current
	\$ Sales (less returns) * \$8,308.00	Returns * \$28,570.00	0	Truck
	ttems Sold ** 21	\$ Your Sales * \$-26,290.00		y informa
	*Does not include tax or core charge *Includes other and non-stock items			

2 Click "New Quote/Invoice"

=	Sellers Dashboard	
Sellers	▲ Looks like you don't have any credits. Your parts will not dis	splay to the public until you <mark>purchase credits</mark> for your account.
Companies	Sales Information	
Commlogs Overview	Sales More Details O	Inventory Manage Inventory
Sales Overview + New Quote/Invoice	Past 30 days → \$ Sales (less returns)* \$8,308.00 \$ Returns * \$28,570.00	Currently Displayed Parts 0 0 0 0
Orders Overview + New Purchase Order + New Item Receipt	Items Sold ** Your Sales * 21 \$-26,290.00	Loading inventory information ssin
Cores Vissed Sales	*Does not include tax or core charge **Includes other and non-stock items Exposures Go to Exposures	Average Parts Content Rank State Unknown S0.00
	Purchase Credits O	50.00

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.

	TPI PARTSLI	NK		
=	Truck Parts Inventory / Selle	rs / Companies / Add Quote		
Sellers	Add Quote			
D Post	Company / Contac	t 🔵		
Seek	Company	Tash Customer		Y
	Contact	Search name, phone, or email		v
Connect	Information			
Profit	Sales Person	Stacey Bjornsson	* Payment Method	Cash
	PO #		Payment Notes	
	Ship Via		Quoted On	2025-01-22 15:51
			Quote Expires	2025-02-21 [30 Days]
	Labels		? Setting	Default
	Commission	Value Private	× Warranty	Value
	Bill To	Ship To	Notes	Private Notes
	522 63rd Street Edmonton, AB Canada	522 63rd Street Edmonton, AB Canada		
	780-233-5182	780-233-5182		

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

	TPI PARTSLII	NK					
≡	Truck Parts Inventory / Seller	s / Companies / Add Quote					
Sellers	Add Quote						
O Post	Company / Contact	t					
Q Seek	Company	P Cash Customer					• 6
	Contact	A. L. Price					۹ 🕜
1 Connect	Information	Las Vegas, Nevada					li i
\$ Profit	Sales Person	Angel's Irwin, Pennsylvania					
	PO#	Alert Alarm Company Price, Utah					
	Ship Via	Adapt Corpus Christi, Texas					•
		A. Advar.		Quote Expires	2025-02-21 [30	Days]	
	Labels		?	Setting	Default		
	Commission	Value	Private ×	Warranty	Value		Public
	Bill To	C Ship To	8	Notes	8 ?	Private Notes	8
	522 63rd Street Edmonton, AB Canada	522 63rd Street Edmonton, AB Canada					
	780-233-5182	780-233-5182					

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.

Company / Contac	t							
Company		fest Customer						· @ +
Contact	Search nar	ne, phone, or email						· @ +
Information								•
Sales Person	Stacey Bjor	msson		Ŧ	Payment Method	Cash		
PO#					Payment Notes			
Ship Via					Quoted On	2025-01-22	2 15:51	#
					Quote Expires	2025-02-21 [30 Days]	
Labels				?	Setting	Default		
Commission	Value		Private	×	Warranty	Value		Public 🗙
Bill To	œ	Ship To		œ	Notes	Ø ?	Private Notes	8 ?
1113333333		1113333333						

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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.

_	Ad	General Info		Sales Tax		
A Sellers		Name	Stacey Test Customer	Business Number		
O Post	Con	Phone Number	1113333333	Tax Code	Use Default Tax Settings v	
Q Seek		Email		Payment Opt	ions	• 8
		Website			Accept House Charge Payments	• 8
1 Connect	Info	Notes			Accept Check Payments	
\$ Profit		NOLES		-	Accept Other Payments	
			A	Transactio	on Options	
		Bill To Address			Allow Invoicing	
		Address	1		Allow Sales Receipt	
		City			Allow Credit Notes Allow Automatic Invoice Email	
		State/Province	Y			Public
	Bill	Zip/Postal Code				e Notes 🗖
	111335	Ship To Addres	Same as billing address			
		Address				
		City	~			
		State/Province	Choose *			1
• Oferen D		Zip/Postal				antity Line Total Tax

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

≡	Truck Parts Inventory / Sellers	s / Companies / Add Quote					
Sellers	Add Quote						
	Company / Contact						
O Post	Company	Stacey Test Customer				×	ß
Q Seek	Contact	Search name, phone, or email				×	ß
1 Connect	Information						
\$ Profit	Sales Person	Stacey Bjornsson	Ŧ	Payment Method	Cash		
	PO#			Payment Notes			
	Ship Via			Quoted On	2025-01-22	15:51	
				Quote Expires	2025-02-21 [3	0 Days]	
	Labels		?	Setting	Default		
	Commission	Value	Private 🗙	Warranty	Value	Pu	ublic
	Bill To	Ship To	Ø	Notes	8 ?	Private Notes	8
	1113333333	1113333333					
						L	_
	Item				Price	Quantity Line Total	Тах

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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	Company / Contac	t						
O Post	Company	Stacey Test Customer					¥	Ø
Q Seek	Contact	Search name, phone, or email					v	ß
1 Connect	Information							
\$ Profit	Sales Person	Stacey Bjornsson	×	Payment Method	Cash			
	PO #			Payment Notes				
	Ship Via			Quoted On	2025-01-22 1	5:51		
				Quote Expires	2025-02-21 [30	Days]		
	Labels		2	Setting	Default			
	Commission	Value	Private ×	Warranty	Value		P	ublic
	Bill To	Ship To	ß	Notes	8 ?	Private Note	es	8
	111333333	111333333						
	Item				Price	Quantity Li	ne Total	Тах
Stacey B	Quick Search	Search - or -						

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.

Company / Contac	:t				
Company	Stacey Test Customer				· Ø +
Contact	Search name, phone, or email				× 8 +
Information					•
Sales Person	Stacey Bjornsson	×	Payment Method	Cash	
PO #			Payment Notes		
Ship Via			Quoted On	2025-01-22 15:51	*
			Quote Expires	2025-02-21 [30 Days]	
Labels		2	Setting	Default	
Commission	Value	Private 🗙	Warranty	Value	Public X
Bill To	🖉 Ship To	œ	Notes	Private No	otes 🖉 ?
1113333333	1113333333				

10

Company	Stacey Test Customer					• 🗷 🕇
Contact	Search name, phone, or ema	1				• 🕑 🕂
Information						+
Sales Person	Stacey Bjornsson	Ŧ	Payment Method	Debit Card		٣
PO #			Payment Notes			
Ship Via			Quoted On	2025-01-22	2 15:51	(
			Quote Expires	2025-02-21 [30 Days]	
Labels	Select from existing labels or	enter new labels ?	Setting	Default		٣
Commission	Value	Private 🗙	Warranty	Value	1	Public X
Bill To	Ship To	ß	Notes	8 2	Private Notes	8 ?
1113333333	1113333333					
				4		
Item				Price	Quantity Line Tot	al Tax

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

O Post				Quote Expires	2025-02-21 [3	0 Days]	
	Labels	Select from existing labels or ent	ter new labels ?	Setting	Default		
Q Seek	Commission	Value	Private ×	Warranty	Value		Public
1 Connect	Bill To	C Ship To		tes	8 2	Private Notes	4
\$ Profit	1113333333	1113333333		163		I IIVate Notes	
					6		
	Item				Price	Quantity Line To	otal Ta
	Quick Search	Search - or -					
	• + Add Gravy Part	+ Add Inventory Item +					
						Subtotal	\$
				Add	Shipping	Total Tax	\$
						🖬 Total	\$0.
Stacey B	Reset	s	Save	Invoice		Sales Re	ceipt
Reminders	Reset this quot		Once saved, you'll be email, save as pdf.	Save and invoice this q	uote.	Save and create a sale quote.	s receipt fo
		able to print, e	citian, advo da pul.			quote.	

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

O Cook	Labels	Select from existing labels	or enter new labels ?	Setting	Default		
Q Seek	Commission	Value	Private 🗙	Warranty	Value		Public
1 Connect	Bill To	Ship To	8	Notes	8 2	Private Notes	_
\$ Profit	1113333333	1113333333					
	bumper	Search - or -			Price	Quantity Line To	tal Tax
	+ Trucks/Trailers + Deals	Add Inventory Item -				Subtotal	\$0.
	+ Other Item			Add	Shipping	Total Tax	\$0.
						Total	\$0.0
Stacey B	Reset		Save	Invoice		Sales Rec	eipt
Reminders	Reset this quote.		quote. Once saved, you'll be print, email, save as pdf.	Save and invoice this q	uote.	Save and create a sale quote.	s receipt for t
JE Tools							

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		Good		
	Q search Part Types			Add Part	
	Bumpers	228			m
	Truck Equipment/Accessories Moose Bumpers	10	Stock #TR12111111212566969-1 Bumpers	\$2,000.00 QTY: 1	
			Good		•
				Add Part	Public X
Bil 11133			Stock #59915245612355896 Bumpers	\$333.00 QTY: 1	te Notes 🥒 ?
ino.			it's a bumper		
				Add Part	
			Stock #59915245612355893 Bumpers	No price set QTY: 1	Jantity Line Total Tax
			Phone test		
e			0	Add Part	
			Stock #TR12111111212566958-12 Bumpers	No price set QTY: 1	\$0.00
_			Ndndh		
			٥	Add Part	\$0.00
			Stock #TR12111111212566958-1	\$5,555.00 QTY: 1	Salas Receint

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.

Add Inventory Item to Quot	1	Bauma	at Notor	
bumper			Search Clear	*
Parts 238 Trucks/Trailers 1	Deals 66	Other Item >	X Last Line Item	*
Filters		1-25 of 238 1 > M	25/page → Newest →	Public X
Keyword(s): bumper Bil	x	Stock #59915245612355906	\$2,000.00 QTY: 1	te Notes 🖉 ?
238 Results for Parts		Bumpers	QIT. I	
Part Type		Good		
Q search Part Types Bumpers	228		Add Part	
Truck Equipment/Accessories Moose Bumpers	10	Stock #TR12111111212566969-1 Bumpers	\$2,000.00 QTY: 1	
		Good		antity Line Total Tax
6			Add Part	1 \$333.00 PF 🗸
		Stock #59915245612355896 Bumpers	\$333.00 QTY: 1	
		it's a bumper		
			Add Part. (1 on quote)	
Θ		Stock #59915245612355893 Bumpers	No price set QTY: 1	

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

	L	abels Select from existing labels or er	ter new labels ?	Setting	Default			
Q Seek	Comm	ission Value	Private 🗙	Warranty	Value		Put	blic
1 Connect	Bill To	Ship To	ß	Notes	₽ ? Pr	ivate No	otes	0
\$ Profit	1113333333	1113333333						
	Item				Price	Quantity	Line Total	T
	Bumpers Condition: Us	IC Corporation PB405 995			333.0) 1	\$333.00) P
	+ Item Lab bumper • + Add Gravy	Search + - or -						
Stacey B					Sub Provincial Tax @ 6.	total 00 %		\$33
					Federal Tax @ 6.8	75 %		2
Reminders				Add	Shipping Tota	I Tax		\$4
F Tools								

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

- Dill	Suspensions & Paris Trailer Parts Transfer Case Assys Transmission Assys Transmission Parts Truck Equipment/Accessories Trucks for Parts Wheel Ends, Hubs & Spokes Wheels A Tres Wheels Martes	97 2 2 156 21 16 195 3 2 2 2	Stock #1R1211111212500909-2 Cab & Cab Parts / Cabs Good Stock #TR12111111212566969-1 Bumpers Good	• •	e Notes	Public X	
			Stock #TR12111111212566969 Trucks for Parts Good condition	No price set QTY: 1			\bigcirc
				• + Add Part	antity Line Total	Тах	
					1 \$333.	00 PF 🗸	
			Stock #TR1211111212566968-1 Cab & Cab Parts / Cabs	\$2,000.00 QTY: 1			
			Good				
				Add Part			
			Stock #59915245612355904 Cab & Cab Parts / Cabs	No price set QTY: 1	1 \$250.	00 PF 🗸	
			fgtsdft				
				• + Add Part			

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".

Q Seek							
1 Connect							
\$ Profit		Item Stock #59915245612355896 Bumpers Condition: Used Truck Make: IC Corporation Truck Model: PB405		Price 333.00	Quantity 1	Line Total \$333.00	PF
		Truck Year: 1995 Description: It's a bumper Hitem Label Stock #TR1211111212566969-3		250.00	1	\$250.00	05
		Cab & Cab Parts / Ignition Switch Condition: Used Truck Make: Western Star Truck Mode: 4700 VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022 Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707		230.00		5250.00	PF
		+ Item Label umper Search - Or - + Add Gravy Part + Add Inventory Item -					
 Stacey B Reminders 		~		Subt ncial Tax @ 6.0 eral Tax @ 6.87	0 %		\$583. 34. 40.
F Tools	Feedback		Add Shippi	_			\$75.

Made with Scribe - https://scribehow.com

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



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



20 You can then adjust the price of the item. Item Price Quantity Line Total Тах Stock #59915245612355896 333.00 \$333.00 PF Bumpers Condition: Used Truck Make: IC Corporation Truck Model: PB405 Truck Year: 1995 Description: it's a bumper + Item Label ock #TR12111111212566969-3 \$250.00 PF V ▣ 250.00 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 R121111112125 6967 (American LaFrance Military) • .00 \$0.00 PF ~ VIN: 12345216236123623 - Mirrors Search - or bumper Add Gravy Part + Add Inventory Item Subtotal \$583.00 Provincial Tax @ 6.00 % 34.98 Federal Tax @ 6.875 % Feedback 40.08

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





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

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

						1.1				
Parts / Inventory / Deals						e N	otes		8	?
Search your other items										
Description	٨	Price	Quantity	Tax Code						
Core Charge		\$500.00	1	E	+ Add to quote					
Document Fee		\$35.00	1		+ Add to quote	antity	Line To	otal	Тах	
FREIGHT		\$0.00	1		+ Add to quote	1	S	333.00	PF	~
LABOUR		\$120.00	1		+ Add to quote					
Labour 1/2		\$60.00	1		+ Add to quote					
Oil Change		\$60.00	1		+ Add to quote					
Pre-TPI Truck Parts		\$0.00	1		+ Add to quote			050.00		
Sales exchange rates		\$0.00	1		+ Add to quote		3	200.00	PF	`
Shipping		\$0.00	1		+ Add to quote					
Shipping Information		\$0.00	1	E	+ Add to quote					
State Vehicle Tax Maximum		\$300.00	1		+ Add to quote					
howing 1 to 11 of 11 entries				<	1 > ∦.	1		\$50.00	PF	,
	Search your other items Description Core Charge Document Fee FREIGHT LABOUR Oil Change Pre-TPI Truck Parts Sales exchange rates Shipping Shipping Information State Vehicle Tax Maximum	Search your other items Description Core Charge Document Fee FREIGHT LABOUR Labour 1/2 Oil Change Pre-TPI Truck Parts Sales exchange rates Shipping Shipping Information State Vehicle Tax Maximum 	Search your other Items Description Price Core Charge \$500.00 Document Fee \$535.00 FREIGHT \$0.00 LABOUR \$120.00 Labour 1/2 \$60.00 Oil Change \$60.00 Pre-TPI Truck Parts \$0.00 Sales exchange rates \$0.00 Shipping \$0.00 Shipping Information \$0.00 State Vehicle Tax Maximum \$300.00	Description Price Quantity Core Charge \$500.00 1 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 States exchange rates \$0.00 1 Shipping \$0.00 1 State Vehicle Tax Maximum \$300.00 1	Search your other items Description Price Quantity Tax Code Core Charge \$500.00 1 E Document Fee \$35.00 1 I FREIGHT \$0.00 1 I LABOUR \$120.00 1 I Labour 1/2 \$60.00 1 I Oil Change \$60.00 1 I Sales exchange rates \$0.00 1 I Shipping \$0.00 1 E Shipping Information \$0.00 1 E	Description Price Tax Code Core Charge \$500.00 1 E + Add to quote Document Fee \$35.00 1 + Add to quote FREIGHT \$0.00 1 + Add to quote LABOUR \$120.00 1 + Add to quote Oil Change \$60.00 1 + Add to quote Oil Change \$60.00 1 + Add to quote Sales exchange rates \$0.00 1 + Add to quote Shipping \$0.00 1 + Add to quote Shipping Information \$0.00 1 + Add to quote State Vehicle Tax Maximum \$300.00 1 + Add to quote	Price Tax Quantity Tax Code Core Charge \$500.00 1 E + Add to quale Document Fee \$35.00 1 + Add to quale Image: Core Charge * Add to quale Document Fee \$35.00 1 + Add to quale * Add to quale * Add to quale LABOUR \$120.00 1 + Add to quale * Add to quale * Add to quale LABOUR \$120.00 1 + Add to quale * Add to quale * Add to quale Coil Change \$60.00 1 + Add to quale * Add to quale * Add to quale Pre-TPI Truck Parts \$0.00 1 + Add to quale * Add to quale * Add to quale Shipping \$0.00 1 + Add to quale * Add to quale * Add to quale Shipping Information \$0.00 1 * Add to quale * Add to quale * Add to quale Shipping Information \$0.00 1 * Add to quale * Add to quale Shipping Information \$0.00 1 * Add to quale * Add to quale	Description Price Quantity Tax Code Core Charge \$500.00 1 E + Add to quote Document Fee \$35.00 1 + Add to quote Image: Code FREIGHT \$0.00 1 + Add to quote Image: Code Image: Code	Parts / Inventory / Deals Price Tax Cuantity Tax Code Description Price Code Initial state Description Image: State Image: State Image: State Image: State Document Fee S35.00 1 Image: Add to quote Image: State Image: State	Parts / Inventory / Deals Price Cuantity Tax Code Description Price Quantity Code Document Fee \$35.00 1 E + Add to quote FREIGHT \$0.00 1 + Add to quote 1 \$333.00 PF LABOUR \$120.00 1 + Add to quote 1 \$333.00 PF Oil Change \$60.00 1 + Add to quote \$350.00 1 \$333.00 PF Sales exchange rates \$0.00 1 + Add to quote \$250.00 1 \$250.00 PF Shipping \$0.00 1 + Add to quote \$250.00 1 \$250.00 PF Shipping Information \$0.00 1 + Add to quote \$250.00 PF Shipping Information \$0.00 1 # Add to quote \$250.00 PF

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



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

Reminders			To	tal	\$8	49.9
			Add Shipping Total T	ax		\$96.
Stacey B			Federal Tax @ 6.875	%		51.3
			Provincial Tax @ 6.00			45.
			Subto	tal.		\$753.
	0	+ Add Gravy Part + Add Inventory Item -				
	bu	Imper Search - or -				
	:: 🖸	Non-stock	0.00	1	\$0.00	PF
	:: 🖸	LABOUR	120.00	1	\$120.00	PF
	II 🛡	VIN: 12345216236123623 - Mirrors	50.00	1	\$50.00	PF
		+ Item Label TR12111111212566967 (American LaFrance Military)				
		Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707				
		VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022				
		Truck Make: Western Star Truck Model: 4700				
		Cab & Cab Parts / Ignition Switch Condition: Used				
\$ Profit			250.00	1	\$250.00	PF
1 Connect		+ Item Label				
		Truck Year: 1995 Description: it's a bumper				
Q Seek		Truck Make: IC Corporation Truck Model: PB405				

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Adjust the price and quantity as necessary.

	Total \$849.95
	Add Shipping Total Tax \$96.95
	Federal Tax @ 6.875 % 51.77
	Subtotal \$753.00 Provincial Tax @ 6.00 % 45.18
0	
•	0,00 1 \$0.00 PF ~
•	120.00 1 \$120.00 PF •
•	50.00 1 \$50.00 PF 🗸
•	
	250.00 1 \$250.00 PF -
1	

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.

Reminders		Total		\$895
	+ Add section header + Add subtotal	Add Shipping Total Tax	0	\$10
Stacey B	+ Add discount	Federal Tax @ 6.875 %		5
	+ Add non-stock item	Provincial Tax @ 6.00 %		4
	+ Add other item	Subtotal		\$79
	HAdd Gravy Part + Add Inventory Item +			
	bumper Search - or -			
	Wrench	40.00	1	\$40.00
	I CABOUR	120.00	1	\$120.00
	TR12111111212566967 (American LaFrance Military) VIN: 12345216236123623 - Mirrors	50.00	1	\$50.00
	+ Item Label			
	Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707			
	** VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022			
	Truck Make: Western Star Truck Model: 4700			
	Cab & Cab Parts / Ignition Switch Condition: Used			
Profit	Stock #TR12111111212566969-3	250.00	1	\$250.00 F
Connect	+ Item Label			
2 Seek	Truck Year: 1995 Description: it's a bumper			
Seek	Truck Model: PB405			

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	Value		Private X		Warranty	Value		Pub	lic X
Bill	To	œ	Ship To	Ø	Notes		8	Private N	otes	8 ?
111333	33333		1113333333							
	Item						Price	Quantity	Line Total	Тах
	Stock #5991524561235 Bumpers Condition: Used Truck Make: IC Corpora Truck Made: PB405 Truck Year: 1995 Description: it's a bumper	lion						333.00		
	Stock #TR12111111212 Cab & Cab Parts / Igniti Condition: Used Truck Make: Western St Truck Model: 4700 VIN: 5KJJAVDV9NLM2: Truck Year: 2022 Description: Good - Truc + Item Label	on Switch ar 3707	JAVDV9NLMZ3707				2	250.00 1	\$250.00	PF 🗸
🛡	TR12111111212566967 VIN: 123452162361236		aFrance Military)					50.00	\$50.00	PF 🗸
								-		

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

O Post	Subtotal				\$793.00
Post	bumper Sear	ch - or -			
Q Seek	+ Add Gravy Part + Add Inv	ventory Item 👻			
1 Connect				Subtotal	\$793.0
\$ Profit				Tax @ 6.00 %	27.60
\$ FIOIL			Federal T	ax @ 6.875 %	31.63
			Add Shipping	Total Tax	\$59.2
				Total	\$852.23
Stacey B	Reset	Save	Invoice	s	ales Receipt
Reminders	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 cr	eate a sales receipt for th quote.
🗲 Tools					
BUY PARTS	s	ELL PARTS	RESOURCES		COMPANY
Search For Parts	IT	PI Features	Facebook Group		About Us
Parts Request	PI	ans & Pricing	Newsletter		Contact Us
Buyer Signup	Be	ecome A Seller	Feedback		Terms & Privacy
		f У in 🙆			

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.

Subtot		- or -			\$793.00
	ravy Part + Add Invent				
				Subtotal	\$793.00
				Tax @ 6.00 %	27.6
			Federal la	ax @ 6.875 %	31.63
			Add Shipping	Total Tax	\$59.23
				🖃 Total	\$852.23
Re	Reset set this quote. Void	Save Save this quote. Once saved, you'll be able to print, email, save as pdf.	Save and invoice this quote.		les Receipt ate a sales receipt for this quote.
Save any sha	nges and vold this Quote.				
Save any cha					
Save any cha					
Save any cha	SEL	LL PARTS	RESOURCES		COMPANY

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

 Sellers Post Seek Connect Profit 	Accounts Receivable Aging Report	and will show on invoice to customer. If you do cho	" button below when you are ready to finali;		1 \$50.00 1 \$120.00 1 \$40.00 \$793.00) PF
				Tax @ 6.00 % ax @ 6.875 % Total Tax		\$793. 27 31.0 \$59.
	Reset	Save	Invoice			
 Stacey B Reminders Tools 	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		ipt for t

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.

Truck Parts Inventory / Sellers / Companies / Stacey Test Customer / Invoice 2548	
Invoice 2548	
🛷 Stacey Test Customer	Balance: \$1,669.61
Primary € 111333333	
Overview	
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	d for this transaction.
Invoice 2548	
Sales Person Stacey Bjornson Payment M Payment Due 2025-01-31 2025-01-31 Sold On January 22, 2025 3	ethod Debit Card
Bill To Ship To	
Stacey Test Customer Stacey Test 1113333333 1113333333	

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

Stacey Test Customer	r				Balance: \$1,669.61
Primary					
	Reference No.	2548P			
	Receivables Due	\$852.23			
	Amount	852.23		6	
	Payment Method	Manually Entered Car	Data	Y	
	Payment Date	2025-01-22 15:55		#	
	Issued By	Stacey Bjornsson		Y	
	Check/Auth No. (optional)				
	Notes (optional)				
Date Invoice		Original Total	Credit Notes Total	Amount Due	Paymen

34 Click "Save Payment"

		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)				
					1	
Date	Invoice		Original Total	Credit Notes Total	Amount Due	Payment
22 Jan 2025	2548		\$852.23	\$0.00	\$852.23	852.23
		Show All Outstar	nding Transactions			
Totals			\$852.23	\$0.00	\$852.23	\$852.23
Discounts				Cancel	Save Payment Pay With	Debit/Credit Card

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

Successfully saved the transac	tion.			×
🛷 Stacey Test Cust	omer			Balance: \$817.38
Primary 4 1113333333				
🖨 Print	D PDF	Se Email	C Edit	會 Void
2548P 22 January 2025				852.23
Issued By Payment Method		Stacey Bjornsson Billed To Credit Stacey Test Cust	omer	
Allocations				
Туре		Date		Allocated
Invoice -	2548	22 January 2025		852.23
		To	tal Paid	852 23

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

Payment				
Successfully saved the transact	tion.			×
🛷 Stacey Test Cust	omer			Balance: \$817.38
Primary • 1113333333				
🖨 Print		Email	☑ Edit	會 Void
2548P 22 January 2025				852.23
Issued By Payment Method		Stacey Bjornsson Billed To Credit Stacey Test C	ustomer	
Allocations				
Туре		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.
----	--

PARTSLI	Email Payment			×	
Truck Parts Inventory / Seller	Email Addresses	You can enter in multiple en	ail addresses		
Payment	Message				
Successfully saved the trans					×
🛷 Stacey Test Cu	Attachment	Payment Email - No attac	hments		Balance: \$817.38
Primary C 1113333333			Close	Send Email	
🕀 Print	6	PDF	Email	C# Edit	ê Void
2548P 22 January 2025					852.23
Issued By Payment Method		Stacey Bjornss Cre		istomer	
Allocations					
Allocations Type			Date		Allocated

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

		ey Test Customer / Void Payment		
Sellers	Void Payment			
O Post	Successfully voided the transaction.			
Q Seek	🛷 Stacey Test Customer			210.02
1 Connect				Balance: \$1
\$ Profit	Primary • 111333333			
	🔒 Print	ß	PDF	Se Email
	2548P 22 January 2025			85
		Stacey Bjornsson	Billed To	
	Issued By		Stacey Test Customer	
	Voided By Voided On	Stacey Bjornsson 22 January 2025		
	Voided By		Not Allocated	

39 Click "Sales Overview"

	TPI			
≡	Truck Parts Inventory / Sellers / Companies / Stac	ey Test Customer / Void Payment		
A Sellers	Void Payment			
G Back	Successfully voided the transaction.			
Companies				
Commlogs Overview	Stacey Test Customer			Balance: \$1,669.
Sales Overview	Primary L1113333333			
+ New Quote/Invoice	Print	ß	PDF	Email
Orders Overview	2548P 22 January 2025			852.2
How Purchase Order New Item Receipt	Issued By Voided By Voided On Payment Method	Stacey Bjomsson Stacey Bjomsson 22 January 2025 Credit	Billed To Stacey Test Customer	
			Not Allocated	852.
Cores			Total Paid	852.
Missed Sales				

40

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

	Jaits (Overview											
O Post	🛗 Dec 24	, 2024 - Jan 22, 202	25		Types 🕶		Paid	/Unpaid 🗸		Trar	nsaction La	ibels	•
Q Seek	Search	×	T	Search Co	ompanies	×					Y Advanc	ed	
1 Connect	ID	Status ~	Company	~	Contact ~	Sales Person ~	Labels ~	Date ~	Total ~	~	Options		~
\$ Profit	2548	Invoice	Stacey Tes	t Customer		Stacey Bjornsson		22 Jan 2025	\$852.23	0	10	Ð	Ø
Q T TOIL	2547	Invoice	Stacey Tes	t Customer		Dana George		21 Jan 2025	\$1,128.75	0	10	0	
	CN43	Credit Note	ABC Marke	ets	Jim Hardy	Scott Tetz		16 Jan 2025	\$282.19	0		0	
	2546	Invoice	Terra			Adrian Chan		16 Jan 2025	\$564.38	0	0	Ð	Ø
	2545	Invoice	Stacey Tes	t Customer		Stacey Bjornsson		15 Jan 2025	\$338.63	0	10	₽	ß
	1408C	Credit Note	Cash Cust	omer		Stacey Bjornsson		09 Jan 2025	\$27,090.00	0		₽	ß
	25-43	Sales Receipt	Bell Marke	ts		Scott Tetz		04 Jan 2025	\$451.50		10	₽	Ø
	Q1423	Quote	Advansed	Teksyzte	Jim Hardy	Scott Tetz		04 Jan 2025	\$1,241.63			₽	Ø
	2544	Sales Receipt	Jackpot Co	onsultant		Scott Tetz		04 Jan 2025	\$564.38		10	0	Ø
	2543	Invoice	Circuit City			Scott Tetz		04 Jan 2025	\$1,692.00	0	10	₽	Ø
	1379C	Credit Note	Cash Cust	omer		Dana George		04 Jan 2025	\$11.29	0		₽	Ø
	1403C	Credit Note	Adventures	Sports!		Stacey Bjornsson		04 Jan 2025	\$564.38	0		Ð	Ø
	1417C	Credit Note	A. L. Price			Stacey Bjornsson		03 Jan 2025	\$564.38			0	
	11422	Invoice	Cash Cust	omer		Adrian Chan		02 Jan 2025	\$0.00	0	I.	Ð	

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

		22, 202	5		Types 🕶		Pai	d/Unpaid ▼		Tra	nsaction La	bels	
eek		×	τ	 Stacey 	Test Customer	* *					T Advance	ed	
~	Status	~	Company	~	Contact ~	Sales Person ~	Labels ~	Date ~	Total ~	~	Options		~
48	Invoice		Stacey Te	st Customer		Stacey Bjornsson	1	22 Jan 2025	\$852.23	0	10	Ð	Ø
17	Invoice		Stacey Te	st Customer		Dana George		21 Jan 2025	\$1,128.75	0	10	₽	Ø
45	Invoice		Stacey Te:	st Customer		Stacey Bjornsson	i l	15 Jan 2025	\$338.63	\odot	6	₽	Ø
1	8 7	8 Invoice 7 Invoice	x x <t< th=""><th>x T x Status x Company 8 Invoice Stacey Te 7 Invoice Stacey Te</th><th>x T # Stacey Status Company Invoice Stacey Test Customer Invoice Stacey Test Customer</th><th>K K F Status Company Contact Invoice Stacey Test Customer Invoice Stacey Test Customer</th><th>x Y States Test Customer x Status Company Contact Sales Person Invoice Stacey Test Customer Stacey Bjornsson Invoice Stacey Test Customer Dana George</th><th>arch ★ T ♦ Stacey Test Customer ★ Status Status Company Contact Sales Person Labels 8 Invoice Stacey Test Customer Dana George</th><th>K T Image: Stace of the sta</th><th>Aarch X Y Image: State of the state</th><th>arch ★ T ♦ Stacey Test Customer ★ ♦ Labels > Date > Total > 8 Invoice Stacey Test Customer ← Stacey Bjornsson 2 22 Jan 2025 \$852.23 O 7 Invoice Stacey Test Customer Dana George 21 Jan 2025 \$1,128.75 O</th><th>Aarch X Y Image: State of the sta</th><th>Aarch X Y Image: State of the sta</th></t<>	x T x Status x Company 8 Invoice Stacey Te 7 Invoice Stacey Te	x T # Stacey Status Company Invoice Stacey Test Customer Invoice Stacey Test Customer	K K F Status Company Contact Invoice Stacey Test Customer Invoice Stacey Test Customer	x Y States Test Customer x Status Company Contact Sales Person Invoice Stacey Test Customer Stacey Bjornsson Invoice Stacey Test Customer Dana George	arch ★ T ♦ Stacey Test Customer ★ Status Status Company Contact Sales Person Labels 8 Invoice Stacey Test Customer Dana George	K T Image: Stace of the sta	Aarch X Y Image: State of the state	arch ★ T ♦ Stacey Test Customer ★ ♦ Labels > Date > Total > 8 Invoice Stacey Test Customer ← Stacey Bjornsson 2 22 Jan 2025 \$852.23 O 7 Invoice Stacey Test Customer Dana George 21 Jan 2025 \$1,128.75 O	Aarch X Y Image: State of the sta	Aarch X Y Image: State of the sta

42 Then select "Companies"

Sellers	Color O												
	Sales O	vervi	ew										
Back	🛗 Dec 24, 2	2024 - Jan	22, 202	5		Types 🕶		Paid	/Unpaid 🕶		Tra	insaction Labels -	,
Commlogs	Search		×	T	∲ Stace	/ Test Customer	· × ·					▼ Advanced	
Overview	ID ~	Status	~	Company	, ~	Contact ~	Sales Person ~	Labels ~	Date ~	Total ~	~	Options	~
ales Overview	2548	Invoice		Stacey Te	st Customer		Stacey Bjornsson		22 Jan 2025	\$852.23	0	16 0	Ø
New	2547	Invoice		Stacey Te	st Customer		Dana George		21 Jan 2025	\$1,128.75	0	6 8	Ø
Quote/Invoice	2545	Invoice		Stacey Te	est Customer		Stacey Bjornsson		15 Jan 2025	\$338.63	0	16 0	Ø
Orders Overview													
New Purchase													
New Item													

43 Search for the company you are looking for.

Truck Parts Inventory / Sellers / Connect		
Connect + Company + Quote	■ All Companies 17 Order t	by Sales Archived Bearch Companies
Companies		~
Name	Location	Contact
	Searching your companies	

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

Connect	Stacey	Test Custom	er						Balance: \$1,6
Profit	Primary								
) 	Transactions 7		Q CommLogs	9	+ Ad	d -		Company 🗸
	🛗 Dec 24, 2	024 - Jan 22, 2025		Types 🕶		Labels	•	Search	
	Туре	Number ~	Date ~	Amount ~	Payment ~ Method	Rep ~	Contact ~	Labels ~	Options ~
	Invoice	2548	22 Jan 2025	\$852.23		Stacey Bjornsson			16 0 0
	Void Payment	2548P	22 Jan 2025	\$0.00	Credit	Stacey Bjornsson			₽ 0
	Invoice	2547	21 Jan 2025	\$1,128.75		Dana George			16 8 8
	Payment	11429P	21 Jan 2025	-\$100.00	Cash	Dana George			800
	Payment	I1422P	15 Jan 2025	-\$50.00	House Charge	Stacey Bjornsson			830
	Payment	I1421P	15 Jan 2025	-\$500.00	Cash	Stacey Bjornsson			8 2 6
	Invoice	2545	15 Jan 2025	\$338.63		Stacey Bjornsson			€ ⊖ ⊠
Stacey B									

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.

S	SELL PARTS	RESOURCES			COMPAN	Y ■Ad
				Paid Balance		\$0.00 52.23
				Total	\$8	52.23
			Provincial Ta Federal Tax			93.00 27.60 31.63 59.23
Subtotal					793.00	
Wrench			40.00	1	40.00	PF
LABOUR			120.00	1	120.00	PF
	211111212566967 (American LaFrance Military) 36123623 - Mirrors		50.00	1	50.00	PF
Description: It's a Stock #TR12111 Cab & Cab Parts Condition: Used Truck Make: We Truck Make: We Truck Mode: 470 VIN: SKJJAVDV9 Truck Year: 2022 Description: Goo	111212566969-3 // Ignition Switch stem Star 00 9NLMZ3707		250.00	1	250.00	PF
Truck Make: IC C Truck Model: PB Truck Year: 1995	405					

46 Select the payment option in the top menu.

Truck Parts Inventory / Se	onero i companico i c	lacey rest Custor	ner / Invoice 2548				
Invoice 254	8						
🛷 Stacey Test C	Customer						Balance: \$1,669.6
Primary							
Overview	Print Options	🐱 Email	+ Payn	nent	幸 Credits	Attachments	More Options
Void Sale Information This sale can be voided u Voiding will be disabled du			record, or a credit no	e has occurre	ed for this transaction.		
This sale can be voided u			record, or a credit no	e has occum	ed for this transaction.		
This sale can be voided u Voiding will be disabled do			stacey Bjornsson 2025-01-31 January 22, 2025	e has occurre Payment I			Debit Car
This sale can be volded u Volding will be disabled dr Invoice 2548 Sales Person Payment Due			Stacey Bjornsson 2025-01-31	Payment I Ship To	Method st Customer		Debit Car

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.

Primary 4 1113333333						
		Reference No.	2548P1			
		Receivables Due	\$852.23			
		Amount	852.23		¢	
		Payment Method	Manually Entered Car	d Data	Y	
		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
		Show All Outstan	iding Transactions			
Totals			\$852.23	\$0.00	\$852.23	\$852.23

48	Click "Sa	ave Payment"						
			Reference No.	2548P1 \$852.23				
			Amount	852.23		¢		
			Payment Method	Cash		¥		
			Payment Date	2025-01-22 15:57		#		
			Issued By	Stacey Bjornsson		¥.		
			Check/Auth No.					
			Notes (optional)			h		
	Date	Invoice		Original Total	Credit Notes Total	Amount Due	Payment	
	22 Jan 2025	2548		\$852.23	\$0.00	\$852.23	852.23	
			Show All Outstan	ding Transactions				
	Totals			\$852.23	\$0.00	\$852.23	\$852.23	
	Discounts				Cance	Save Payment Pa	y With Debit/Credit Card	
JY PARTS		SELL PAF	RTS	RES	OURCES		COMPANY	
rch For Parts		TPI Features		Faceb	ook Group		About Us	

47

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

Successfully saved the transacti	ion.			×
🛷 Stacey Test Custo	omer			Balance: \$817.38
Primary C 1113333333				
⊖ Print	D PDF	🗷 Email	C Edit	會 Void
2548P1 22 January 2025				852.23
Issued By Payment Method		Stacey Bjornsson Billed To Cash Stacey Test Custo	omer	
Allocations				
Туре		Date		Allocated
Invoice -	2548	22 January 2025		852.23
		Tota	al Paid	852.23