How To Create An Invoice For A Customer

TPI	PARTSLINK					
Sellers	Dashboard					
	🔺 Looks like you do	on't have any	credits. Your parts will not di	isplay to the	public until you <mark>purchase cre</mark>	dits for your ac
Sales Info	rmation					
Sales			More Details 🔿	Inve	entory	
			Past 30 days -		Currently Displayed	Cur
\$	Sales (less returns) * \$8,308.00	\$	Returns ⁼ \$28,570.00		Parts 0	U T
Ø	ltems Sold [⊧]	\$	Your Sales * \$-26,290.00		Loading invento	ory infor
*Does not inclu **Includes othe	de tax or core charge r and non-stock items				, in the second s	

2 Click "New Quote/Invoice"

	Sellers Dashhoard	
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 Outer Overview	Past 30 days - \$ Sales (less returns)* \$8,308.00 \$ Returns * \$28,570.00	Currently Displayed Parts 0 0 0
+ New Purchase Order + New Item Receipt	Items Sold ** Your Sales * 21 \$-26,290.00	Loading inventory information.st 0 0
Cores /lissed Sales	**includes other and non-stock items Exposures Go to Exposures ©	Average Parts Content Rank Unknown \$0.00
	Purchase Credits 🗢	

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.

	PARTSLI	NK		
≡	Truck Parts Inventory / Selle	rs / Companies / Add Quote		
Sellers	Add Quote			
D Post	Company / Contac	t 👝		
Sock	Company	I Cash Customer		Y
JEEK	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	rs / Companies / Add Quote				
Sellers	Add Quote					
O Post	Company / Contact	t				
@ Seek	Company	Cash Customer				× Ø
COCK	Contact	at Price				٩ ٢
1 Connect	Information	A. L. Price Las Vegas, Nevada				Ī
\$ Profit	Sales Person	Angel's Irwin, Pennsylvania				
	PO #	Alert Alarm Company Price, Utah				
	Ship Via	Adapt Corpus Christi, Texas				
		A Advant		Quote Expires	2025-02-21 [30 [Days]
	Labels		?	Setting	Default	
	Commission	Value	Private ×	Warranty	Value	Public
	Bill To	📧 Ship To	ß	Notes	9 ?	Private Notes 🛛 💆
	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	Stacey 1	Fest Customer					(· @ +
Contact	Search nar	ne, phone, or email					· · · · · · · · · · · · · · · · · · ·	· @ +
Information								•
Sales Person	Stacey Bjo	msson		٣	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 X
Bill To	ß	Ship To		ß	Notes	8 2	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.

_	٨d	General Info		Sales Tax			
A Sellers	Au	Name	Stacey Test Customer	Business Number			
O Post	CON	Phone	1113333333	Tax Code	Use Default Tax Settings 🔹		-
@ Seek		Email		Payment Opt	ions	×	
		Website			Accept House Charge Payments	*	ß
1 Connect	Info	Notes			Accept Check Payments		
\$ Profit		Holes		-	Accept Other Payments		
			di d	Transactio	on Options		
		Bill To Address			Allow Invoicing		
		Address			Allow Sales Receipt		
		City			Allow Credit Notes		
		State/Province	×		0	Pu	ublic
	Bill	Zip/Postal Code				e Notes	0
	11133	Ship To Addres	Same as billing address				
		Address					
		City					
		State/Province	Choose +				
• 0(D		Zip/Postal				antity Line Total	Тах

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

Ξ	Truck Parts Inventory / Seller	s / Companies / Add Quote					
Sellers	Auu Quote						
	Company / Contact	t					
O Post	Company	Stacey Test Customer					Ø
🗨 Seek	Contact	Search name, phone, or email				*	Ø
1 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 [3	30 Days]	
	Labels		2	Setting	Default		
	Commission	Value	Private ×	Warranty	Value	Put	blic
	Bill To	🗷 Ship To	œ	Notes	8 ?	Private Notes	2
	1113333333	1113333333					
							-
	Item				Price	Quantity Line Total	T

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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.

	Company / Contact	t						
O Post	Company	Stacey Test Customer					v	Ø
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 1	5:51		
				Quote Expires	2025-02-21 [30	Days]		
	Labels		?	Setting	Default			
	Commission	Value	Private 🗙	Warranty	Value		P	ublic
	Bill To	Ship To	ß	Notes	8 ?	Private Not	es	8
	111333333	111333333						
	Item				Price	Quantity L	ine 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 en	nail			• 🗷 +
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		?	Setting	Default	
Commission	Value	Private X	Warranty	Value	Public 🗙
Bill To	🗷 Ship To	ß	Notes	Private N	lotes 🧷 ?
1113333333	1113333333				

10

Company	Stacey Test Customer					• @ +
Contact	Search name, phone, or email					• 🕑 🕂
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	8	Notes	8 7	Private Notes	8 ?
1113333333	1113333333					
				10		
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 [30	0 Days]	
	Labels	Select from existing labels or en	nter new labels ?	Setting	Default		
Q Seek	Commission	Value	Private ×	Warranty	Value		Public
1 Connect	Dill To	Chin To		Notos		Drivete Notes	4
¢ Profit	DIII IU	Sillh In		NULUS		FIIVALE NULES	-
	Item				Price	Quantity Line To	tal T.
	Quick Search • Add Gravy Part	Search - or - Add Inventory Item -					
						Subtotal	4
				Ade	1 Shipping	Total Tax	
					1	Total	\$0
Stacey B	Reset		Save	Invoice		Total	\$0 eipt
 Stacey B Reminders 	Reset Reset this quote.	Save this quote	Save	Invoice Save and invoice this	quote.	Total Sales Rec Save and create a sale	\$0 ceipt s receipt fo

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		
et Seek	Commission	Value	Private 🗙	Warranty	Value		Public
1 Connect	Bill To	Shin To	œ	Notes	8 2	Private Notes	1
\$ Profit	1113333333	1113333333					
	bumper	Search + or -			Price	Quantity Line Tot	tal Tax
	+ Trucks/Trailers	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.	Save this q able to j	uote. Once saved, you'll be print, email, save as pdf.	Save and invoice this q	uote.	Save and create a sales quote.	receipt for
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			Stock #59915245612355896 Bumpers	\$333.00 QTY: 1	te Notes 🥒 ?
ma			it's a bumper		
				Add Part	
			Stock #59915245612355893 Bumpers	No price set QTY: 1	#
			Phone test		
			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 Quote	_	Daumant M	latas X	
bumper			Search Clear	
Parts 238 Trucks/Trailers 1	Deals 66	Other Item 🔶	× Last Line Item	*
Filters		1-25 of 238 1 > M	25/page	Public X
Keyword(s): bumper	x	Stock #59915245612355906	\$2,000.00	te Notes 🥒 ?
238 Results for Parts		Bumpers	QIT: 1	
Part Type		Good		
Q search Part Types	220		Add Part	
Truck Equipment/Accessories Moose Bumpers	10	Stock #TR12111111212566969-1 Bumpers	\$2,000.00 QTY: 1	
		Good		Jantity 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)	
Ø		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
	Stock #59913 Bumpers Condition: Ug Truck Make: Truck Model: Truck Year: 1 Description: I	sed 5245612355896 IC Corporation PB405 995 t's a bumper			333.0) 1	\$333.00) P
	+ Item Lab bumper • + Add Gravy	el Search - Of - Part + Add Inventory Item -						
Stacev B					Sub Provincial Tax @ 6.	total 00 %		\$33
					Federal Tax @ 6.8	75 %		2
Reminders				Add	Shipping Tota	I Tax		\$4
& Toolo								

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

Bill 11133:	Suspensions & Panis Trailer Parts Transmission Assys Transmission Parts Truck Equipment/Accessories Trucks for Parts Wheel Ends, Hubs & Spokes Wheels & Tires Windshield Washer Reservoirs	37 2 156 21 16 195 3 2 2 2	STOCK # I K12111111212500909-2 Cab & Cab Parts / Cabs Good Stock #TR12111111212566969-1 Bumpers Good	• + Add Part • + Add Part • + Add Part	e Notes	ublic X	
			Stock #TR12111111212566969 Trucks for Parts Good condition	No price set QTY: 1 • + Add Part	antity Line Total	Tax	
::			Stock #TR12111111212566968-1 Cab & Cab Parts / Cabs Good	\$2,000.00 QTY: 1 • Add Part	1 5353.0	U PF V	
			Stock #59915245612355904 Cab & Cab Parts / Cabs fgtsdft	No price set QTY: 1 • Add Part	1 \$250.0	0 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".

Q Seek						
1 Connect			4			
¢ Drofit		Item	Price	Quantity	Line Total	Тах
\$ Pront		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	250.00	1	\$250.00	PF
Stacey B	Ð	+ Item Label Imper Search + OF - + Add Gravy Part + Add Inventory Item +	Subt Provincial Tax @ 6.0	otal 0 %		\$583
Reminders			Federal Tax @ 6.87	5 %		34. 40.
🗲 Tools	Feedback		Add Shipping Total	Тах		\$75.

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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.

Dill									11 3	
DIII	Parts / Inventory / Deals						otes		8	
111335	Search your other items									
	Description	Price 🍦 Q	uantity C	Tax ode						
	Core Charge	\$500.00	1	E	+ Add to quote					
	Document Fee	\$35.00	1		+ Add to quote	antity	Line	Total	Тах	
	FREIGHT	\$0.00	1		+ Add to quote	1		\$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	1		\$250.00	DE	
Ľ	Sales exchange rates	\$0.00	1		+ Add to quote			\$250.00	PF	Ť
	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					
🖸	Showing 1 to 11 of 11 entries			<	1 1	1		\$50.00	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.

			T (111)	otal	\$84	19.9
Reminders			Add Shipping Total	Тах		\$96.
Stacey B			Federal Tax @ 6.87	5 %		51.
			Provincial Tax @ 6.0	0 %		45.
			Subt	otal		\$753
	0	+ Add Gravy Part + Add Inventory Item -				
	b	umper 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				
		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	PF
1 Connect		+ Item Label				
COCCA		Truck Year: 1995 Description: it's a bumper				
@ Seek		Truck Model: PB405				

26

Adjust the price and quantity as necessary.

				0040	0.00	F
		Add Shipping Total Tax		ş	96.9	95
		Federal Tax @ 6.875 %			51.77	7
		Subtotal Provincial Tax @ 6.00 %		\$7	45.18	8
0	+ Add Gravy Part + Add Inventory Item •			103		
1		K.O	1 3	0.00	PF	
•	a LABOUR	120.00	1 \$12	0.00	PF	`
•	TR12111111212566967 (American LaFrance Military) VIN: 12345216236123623 - Mirrors	50.00	1 \$5	0.00	PF	
	+ Item Label					
•	Truck Model: 4700 VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022 Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707					
	Cab & Cab Parts / Ignition Switch Condition: Used Truck Make: Western Star					
	Stock #TR12111111212566969-3	250.00	1 \$25	0.00	PF	,
	Truck Year: 1995 Description: it's a bumper					
•	Truck Model: PB405					

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.

			Tot	tal	000	
Reminders		+ Add section header + Add subtotal	Add Shipping Total T	ax	5	\$102
Stacev B		+ Add discount	Federal Tax @ 6.875	%		54.
		+ Add non-stock item	Provincial Tax @ 6.00	%		47.
		+ Add other item	Subtot	tal	5	\$793
	0	+ Add Gravy Part + Add Inventory Item -				
	bu	search • or -				
	•••	Wrench	40.00	1	\$40.00	PF
	II 🖸	LABOUR	120.00	1	\$120.00	PF
	•	VIN: 12345216236123623 - Mirrors	50.00		\$50.00	PF
		+ Item Label	50.00		650.00	-
		Description: Good - Truck VIN: 5KJJAVDV9NLMZ3707				
		Truck Year: 2022				
		Truck Model: 4700				
		Condition: Used				
\$ Profit		Stock #TR12111111212566969-3	250.00	1	\$250.00	PF
Connect		+ Item Label				
• • • • • • • • • • • • • • • • • • • •		Truck Year: 1995 Description: it's a bumper				
🔁 Seek	==	Truck Model: PB405				

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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	Ship To	8	Notes	8 ?	Private N	otes	8 ?
11133	33333	1113333333						
	Item				Price	Quantity	Line Total	Tax
•	Stock #59915245612355896 Bumpers Condition: Used Truck Make: IC Corporation					333.00 1	\$333.00	E
	Truck Woler, 1995 Description: it's a bumper							
	Stock #TR12111111212566969-3 Cab & Cab Parts / Ignition Switch Condition: Used Truck Make: Western Star					250.00 1	\$250.00	PF 🗸
	VIN: 5KJJAVDV9NLMZ3707 Truck Year: 2022 Description: Good - Truck VIN: 5K	JJAVDV9NLMZ3707						
	TR1211111212566967 (American	n LaFrance Military)				50.00 1	\$50.00	PF ¥
		-						

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

0 .D	Subtotal				\$793.00
O Post	bumper Sea	arch - or -			
Q Seek	+ Add Gravy Part + Add I	nventory Item 👻			
1 Connect	Sector Contraction of the sector of the sect			Subtotal	\$793.00
\$ Profit			Provincial	Tax @ 6.00 %	27.60
J I IOIR			Federal T	ax @ 6.875 %	31.63
			Add Shipping	Total Tax	\$59.23
				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 this quote.
🗲 Tools					
BUY PARTS			RESOURCES		COMPANY
Caarab Ear Darta			Fassbeek Craup		Abautila
Search Polyants			Pacebook Group		About Us
		Plans & Pricing	Newsletter		Contact Us
Buyer Signup	1	Become A Seller	Feedback		Terms & Privacy
		4 🖬 🗔 🕅			
		T y in U			

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.

Quick S	earch Search	- or -			
• + Ad	d Gravy Part + Add Inve	ntorv Item 👻			
				Subtotal	\$793.00
			Provincial 1	ax @ 6.00 %	27.6
			rederal la	A @ 0.070 %	31.63
			Add Shipping	Total Tax	\$09.23
				Total	\$852.23
	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.	Save and creat	les Receipt te a sales receipt for this quote.
	Void				
	changes and void this Quote.				
Save any o					
Save any (
Save any o	SE	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 Q Seek J Connect \$ Profit	Confirm Invoice - Options Confirm Invoice - Options The payment due date is optional a Accounts Receivable Aging Report Payment Due Date Please confirm this quote is ready t invoice.	and will show on invoice to customer. If you do cho	ose a payment due date - this will also affect " button below when you are ready to finaliz Cancel Confirm	ct your ce this m and Sell	1 \$50.00 1 \$120.00 1 \$40.00 \$753.00) PF) PF) PF
			Provincial Federal T Add Shipping	Total Tax @ 6.875 % Total Tax	\$8	\$793. 27 31.(\$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 f

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 1113333333 	
Overview	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
Sold On January 22, 2025	
Sold On January 22, 2025 Bill To Ship To Stacey Test Customer Stacey Test Customer 1113333333 1113333333	

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

🛷 Stacey	Test Customer					Balance: \$1,669.61
Primary C 1113333333						
		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		¥	
		Check/Auth No. (optional)				
		Notes (optional)				
Date	Invoice		Original Total	Credit Notes Total	Amount Due	Paymen
22 Jan 2025	2548		\$852.23	\$0.00	\$852.23	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		m	
		Issued By	Stacey Bjornsson		×	
		Check/Auth No. (optional)				
		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	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	☑ 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	ction.			×
🛷 Stacey Test Cust	omer			Balance: \$817.38
Primary • 1113333333				
🖨 Print		Email	C≇ Edit	會 Void
2548P 22 January 2025				852.23
Issued By Payment Method		Stacey Bjornsson Billed To Credit Stacey Test Cr	ustomer	
Allocations				
Туре		Date		Allocated
Invoice -	2548	22 January 2025		852.23

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

	Email Payment				
Truck Parts Inventory / Seller	Email Addresses	You can optor in multiple option	ail addraaaa		
Payment	Message		an autresses		
Successfully saved the trans					×
🛷 Stacey Test Cu	Attachment	Payment Email - No attac	hments		Balance: \$817.38
Primary C 1113333333			Close	Send Email	
🔒 Print	B 1	PDF	Email	☑ Edit	窗 Void
2548P 22 January 2025					852.23
Issued By Payment Method		Stacey Bjornsso Cree	on Billed To Jit Stacey Test Cus	tomer	
Allocations					
			ate		Allocated
Туре		L.	Jule		

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

		ey lest customer 7 void Payment		
Sellers	Void Payment			
O Post	Successfully voided the transaction.			
Q Seek	🛷 Stacey Test Customer			
1 Connect				Balance: \$1
\$ Profit	Primary 1113333333			
	🔒 Print	ß	PDF	S Email
	2548P 22 January 2025			85
	Issued By	Stacey Bjornsson	Billed To	
	Issued by	Stacey Biomsson	Stacey Test Customer	
	Voided By Voided On	22 January 2025		
	Volded By Volded Dy Volded On Payment Method	22 January 2025 Credit	Net Allocated	

39 Click "Sales Overview"

	TPI PARTSLINK			
≡	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	e Print	2	PDF	🖉 Email
Orders Overview	2548P 22 January 2025			852.2
New Purchase Order New Item	Issued By Voided By Voided On	Stacey Bjornsson Stacey Bjornsson 22 January 2025	Billed To Stacey Test Customer	
Receipt	Payment Method	Credit	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.

	ТРІ	PARTSLINK									
≡	Truck Parts Inven	ntory / Sellers /	Sales Overview								
Sellers	Sales O	verview									
O Post	@ Dec 24, 2	2024 - Jan 22, 202	25	Types 🕶		Paid	Unpaid 🗸		Trar	saction Labels	S -
Q Seek	Gearch	×	T Search C	ompanies	×					T Advanced	
1 Connect	ID ~	Status ~	Company ~	Contact ~	Sales Person 🗸	Labels ~	Date ~	Total ~	~	Options	~
\$ Profit	2548	Invoice	Stacey Test Customer		Stacey Bjornsson		22 Jan 2025	\$852.23	0	16 Đ	
J From	2547	Invoice	Stacey Test Customer		Dana George		21 Jan 2025	\$1,128.75	0	10 e	
	CN43	Credit Note	ABC Markets	Jim Hardy	Scott Tetz		16 Jan 2025	\$282.19	0	Ð	
	2546	Invoice	Тегга		Adrian Chan		16 Jan 2025	\$564.38	0	10 Đ	
	2545	Invoice	Stacey Test Customer		Stacey Bjornsson		15 Jan 2025	\$338.63	0	10 Đ	
	1408C	Credit Note	Cash Customer		Stacey Bjornsson		09 Jan 2025	\$27,090.00	0	Ð	
	25-43	Sales Receipt	Bell Markets		Scott Tetz		04 Jan 2025	\$451.50		10 Đ	
	Q1423	Quote	Advansed Teksyzte	Jim Hardy	Scott Tetz		04 Jan 2025	\$1,241.63		Ð	
	2544	Sales Receipt	Jackpot Consultant		Scott Tetz		04 Jan 2025	\$564.38		16 0	
	2543	Invoice	Circuit City		Scott Tetz		04 Jan 2025	\$1,692.00	0	16 e	
	1379C	Credit Note	Cash Customer		Dana George		04 Jan 2025	\$11.29	0	Ð	
	1403C	Credit Note	AdventureSports!		Stacey Bjornsson		04 Jan 2025	\$564.38	0	Ð	
	1417C	Credit Note	A. L. Price		Stacey Bjornsson		03 Jan 2025	\$564.38		Ð	
	11422	Invoice	Cash Customer		Adrian Chan		02 Jan 2025	\$0.00	0	16 e	

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

						5		Types 🕶		Pai	d/Unpaid ▼		Tra	nsaction La	bels	
earch		×	τ	 Stacey 	Test Customer	* *					T Advance	ed				
~	Status	~	Company	~	Contact ~	Sales Person ~	Labels ~	Date ~	Total ~	~	Options		~			
18	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			
15	Invoice		Stacey Te	st Customer		Stacey Bjornsson	i l	15 Jan 2025	\$338.63	0	6	₽	Ø			
	8 7 5	arch Status 8 Invoice 7 Invoice 5 Invoice	sarch × Status × 8 Invoice 7 Invoice 5 Invoice	x T x X x <th>x T arch x T Status Company 8 Invoice 7 Invoice 5 Invoice</th> <th>x T x x <t< th=""><th>x X X Status Company Contact Sales Person Noice Stacey Test Customer Stacey Bjornsson Invoice Stacey Test Customer Dana George Invoice Stacey Test Customer Stacey Bjornsson Stacey Test Customer Stacey Bjornsson Stacey Test Customer Stacey Bjornsson</th><th>x Y Status Company Contact Sales Person Labels * Status * Company Contact Sales Person Labels * Invoice Stacey Test Customer * Stacey Bjornsson 7 Invoice Stacey Test Customer Dana George 5 Invoice Stacey Test Customer Stacey Bjornsson</th><th>x T Image: Control of the control of t</th><th>x T Import of the standard of the</th><th>x T Image: Status of the state of t</th><th>x T Image: State of the state of th</th><th>Invoice Status Company Contact Sales Person Labels Date Total × × Options 8 Invoice Stacey Test Customer Stacey Bjornson 22 Jan 2025 \$852.23 O Image: Heiler Bioler Bioler</th></t<></th>	x T arch x T Status Company 8 Invoice 7 Invoice 5 Invoice	x T x x <t< th=""><th>x X X Status Company Contact Sales Person Noice Stacey Test Customer Stacey Bjornsson Invoice Stacey Test Customer Dana George Invoice Stacey Test Customer Stacey Bjornsson Stacey Test Customer Stacey Bjornsson Stacey Test Customer Stacey Bjornsson</th><th>x Y Status Company Contact Sales Person Labels * Status * Company Contact Sales Person Labels * Invoice Stacey Test Customer * Stacey Bjornsson 7 Invoice Stacey Test Customer Dana George 5 Invoice Stacey Test Customer Stacey Bjornsson</th><th>x T Image: Control of the control of t</th><th>x T Import of the standard of the</th><th>x T Image: Status of the state of t</th><th>x T Image: State of the state of th</th><th>Invoice Status Company Contact Sales Person Labels Date Total × × Options 8 Invoice Stacey Test Customer Stacey Bjornson 22 Jan 2025 \$852.23 O Image: Heiler Bioler Bioler</th></t<>	x X X Status Company Contact Sales Person Noice Stacey Test Customer Stacey Bjornsson Invoice Stacey Test Customer Dana George Invoice Stacey Test Customer Stacey Bjornsson Stacey Test Customer Stacey Bjornsson Stacey Test Customer Stacey Bjornsson	x Y Status Company Contact Sales Person Labels * Status * Company Contact Sales Person Labels * Invoice Stacey Test Customer * Stacey Bjornsson 7 Invoice Stacey Test Customer Dana George 5 Invoice Stacey Test Customer Stacey Bjornsson	x T Image: Control of the control of t	x T Import of the standard of the	x T Image: Status of the state of t	x T Image: State of the state of th	Invoice Status Company Contact Sales Person Labels Date Total × × Options 8 Invoice Stacey Test Customer Stacey Bjornson 22 Jan 2025 \$852.23 O Image: Heiler Bioler			

42 Then select "Companies"

		,	iero /	oules o	i ci vicu										
Sellers	Sales O	vervi	ew												
Back	i Dec 24, 2	2024 - Jan	22, 202	25		Types 🕶			Paid	/Unpaid 🕶		Tra	nsaction	Labels	5 •
ompanies	Search		×	۲	🛷 Stad	ey Test Custome	er × *						Y Adva	nced	
verview	ID ~	Status	~	Compa	any	Contact	Sales Perso	n v L	abels ~	Date ~	Total ~	~	Option	IS	
les Overview	2548	Invoice		Stacey	Test Custome	r	Stacey Bjorn	sson		22 Jan 2025	\$852.23	0		6 8	- 1
New	2547	Invoice		Stacey	Test Custome	r	Dana George	е		21 Jan 2025	\$1,128.75	0	1	6 8	
iote/Invoice	2545	Invoice		Stacey	Test Custome	r	Stacey Bjorn	sson		15 Jan 2025	\$338.63	0		6 8	T
ders Overview															
New Purchase der															
New Item															
ceipt															

43 Search for the company you are looking for.

Connect		
Connect + Company + Quote	😹 All Companies 🛛 🗍 F Order b	y Sales Archived Search 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: \$1,669
Profit	Primary							
	Ē	Transactions 7		Q CommLogs	9	+Add -		🔲 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		15 🖶 🖾
	Void Payment	2548P	22 Jan 2025	\$0.00	Credit	Stacey Bjornsson		₽ 0
	Invoice	2547	21 Jan 2025	\$1,128.75		Dana George		€ ⊖ Ø
	Payment	11429P	21 Jan 2025	-\$100.00	Cash	Dana George		800
	Payment	I1422P	15 Jan 2025	-\$50.00	House Charge	Stacey Bjornsson		88
	Payment	I1421P	15 Jan 2025	-\$500.00	Cash	Stacey Bjornsson		
	Invoice	2545	15 Jan 2025	\$338.63		Stacey Bjornsson		
Stacey B								
Demindere								

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.

3	SELL PARTS	RESOURCES			COMPAN	Y
				Paid Balance	s	\$0.00 52.23
				Total	\$8	52.23
			Provincial Ta Federal Tax	Subtotal IX @ 6.00 % : @ 6.875 % Total Tax	7	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
Truck Item: TR1 VIN: 12345216	2111111212566967 (American LaFrance Military) 236123623 - Mirrors		50.00	1	50.00	PF
Stock #TR1211 Cab & Cab Pari Condition: Usec Truck Make: W Truck Model: 47 VIN: 5KJJAVD Truck Year: 202 Description: Go	1111212566969-3 s / Ignition Switch f stefern Star 700 9NLMZ3707 2 od - Truck VIN: 5KJJAVDV9NLMZ3707		250.00	1	250.00	PF
Truck Model: Pl Truck Year: 199 Description: it's	3405 5 a bumper					

46 Select the payment option in the top menu.

Huck Parts Inventory / Se		tuccy rest oustor	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 d	up to 24 hours from when i during this time period if a p	it was created. Dayment tracking	record, or a credit no	te has occurre	ed for this transaction.		
Veid Sale Information This sale can be volded u Voiding will be disabled d	up to 24 hours from when i luring this time period if a p	it was created. payment tracking	record, or a credit no	te has occurre	ed for this transaction.		
Void Sale Information This sale can be voided u Voiding will be disabled d Invoice 2548 Sales Person Payment Due Sold On	up to 24 hours from when i during this time period if a j	It was created. Dayment tracking	stacey Bjornsson 2025-01-31 January 22, 2025	Payment I	ed for this transaction. Wethod		Debit Car
Void Sale Information This sale can be voided L Voiding will be disabled d Invoice 2548 Sales Person Payment Due Sold On Bill To Stacey Test Customer 111333333	up to 24 hours from when i turing this time period if a p	t was created. payment tracking	stacey Bjornsson 2025-01-31 January 22, 2025	Payment I Ship To Stacey Te: 111333333	ed for this transaction. Method		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 Care	d Data	v	
		Payment Date	2025-01-22 15:57		m	
		Issued By	Stacey Bjornsson		v	
		Check/Auth No. (optional)				
		Notes (optional)				
					10	
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	nding Transactions			
Totals			\$852.23	\$0.00	\$852.23	\$852.23

48	Click "Sa	ave Payn	nent"					
			Reference No.	2548P1				
			Receivables Due	\$852.23				
			Amount	852.23		¢		
			Payment Method	Cash		¥		
			Payment Date	2025-01-22 15:57				
			Issued By	Stacey Bjornsson		Y		
			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	ding Transactions				
	Totals			\$852.23	\$0.00	\$852.23	\$852.23	
	Discounts				Cance	Save Payment Pa	y With Debit/Credit Card	
JY PARTS		s		RES	SOURCES		COMPANY	
rch For Parts			PI Features	Faceb	ook Group		About Us	
S 📮 Feedback		Р	lans & Pricing	News	etter		Contact Us	on List 2

47

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

Successfully saved the transact	ion.			×
🛷 Stacey Test Custo	omer			Balance: \$817.38
Primary C 1113333333				
🖨 Print	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