

SALES

QUOTES - CONVERT TO ORDER

You can convert a Sales Quote to a Sales Order directly from the Sales Quotes listing screen when the quote is in Status:

- New Quote or
- Customer Accepted Quote

Ribbon Access: Sales > Quotes

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	Equipment / Locati	ons Contract	Finance /	HR I	Inventory	Maint	enance /	Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
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Customers	Services Templa	es Commercials	POS Lite	Quotes	Orders	Invoices	Credit Notes	Statement Run							
	Master				Proce	essing			4						\Diamond

- 1. The *Sales Quotes* listing screen will display.
- 2. Select the *Site* you wish to work in.
 - The example has *Durban* selected.
- 3. A Sales Quote can only be Converted to a Sales order in the New

Quote and Customer Accepted Quote status.

- The example has *New Quote* selected.
- 4. Click on the *row* of the quote you wish to *convert*.
- 5. Click on *Convert Order*.



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	QT0000303	HOP001	Hope Works (Pty) Ltd	Copy of Test M	1,104.00	ZAR	1.00	15.00	10/07/2020	Abigail Milne		Ν	Α	
	QT0000103	HOP001	Hope Works (Pty) Ltd		8,685.66	ZAR	1.00	14.00	16/02/2017	Bianca Du Toit		N	Α	
	QT0000097	BOT0001	Bothas Networking inc	test	60.01	USD	10.00	14.00	10/11/2016	Bianca Du Toit		N	Α	
	QT0000246	APP0001	Apple Juice Inc		920.00	ZAR	1.00	15.00	21/11/2018	Bianca Du Toit		N	Α	
	QT0000237	APP0001	Apple Juice Inc	Copy of 1234	982.10	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		N	A	
	QT0000120	HOP001	Hope Works (Pty) Ltd	Retest	21,931.32	USD	7.00	14.00	20/04/2017	Judith Mudzengi		Ν	Α	
	QT0000306	SWE0001	Sweets	Test Default Ite	2,794.50	ZAR	1.00	15.00	13/07/2020	Abigail Milne		N	Α	
	QT0000312	BIG0001	Big Bargains	BB001	6,100.89	ZAR	1.00	15.00	14/07/2020	Abigail Milne		N	Α	
	QT0000260 📌	HOP001	Hope Works (Pty) Ltd	test	920.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		Ν	Α	
	QT0000220	APP0001	Apple Juice Inc	C copy Test sou	81.94	ZAR	1.00	15.00	29/05/2018	Belinda Sharm		N	Α	
	QT0000114	HOP001	Hope Works (Pty) Ltd	1234	4,227.25	ZAR	1.00	14.00	12/04/2017	Bianca Du Toit	test	N	Α	
	QT0000266	HOP001	Hope Works (Pty) Ltd	Copy of test	10,005.00	ZAR	1.00	15.00	25/07/2019	Bianca Du Toit		N	Α	
	QT000080	YES001	Young Electric	New 123	567.23	ZAR	1.00	14.00	21/09/2016	Bianca Du Toit	Test custom r	Ν	Α	
	QT0000277	APP0001	Apple Juice Inc	Test Quote	6,509.54	ZAR	1.00	15.00	21/08/2019	Bianca Du Toit		N	Α	
	QT0000174	HOP001	Hope Works (Pty) Ltd	BPO Quote deta	513.00	ZAR	1.00	1.00	08/08/2017	Bianca Du Toit		N	Α	
۲	QT0000320	OFF001	Office Supplies Unlimited	OSU1001	3,239.17	ZAR	1.00	15.00	22/02/2021	Sasha Jones	Full installation	. N	Α	
	QT0000249	APP0001	Apple Juice Inc	test	993.60	ZAR	1.00	15.00	09/01/2019	Bianca Surend		N	Α	
	QT0000180	SAM001	Samanthas Diner	USD, 0, 10, TYPE	171.54	USD	10.00	0.00	10/08/2017	Bianca Du Toit		N	Α	
	QT0000206	HOP001	Hope Works (Pty) Ltd	Test Links	1,593.96	ZAR	1.00	14.00	16/02/2018	Bianca Du Toit		N	Α	
	QT0000300	HOP001	Hope Works (Pty) Ltd	AB017	259,864.04	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Cloned a quot	N	Α	
	QT0000100	BOT0001	Bothas Networking inc	QT0000100	8,703.90	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	Α	
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? You will receive three (3) Order Generation messages.

- 6. When you receive the first *Order Generation* message to confirm;
 - Are you sure you want to convert quote QT[quote number] for customer [customer name] to an order?
- 7. Click on **Yes** to proceed with the Order Generation.
 - Click on *No* to ignore or cancel the request and to keep the quote in the New Quote status.



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	QT0000103	HOP001	Hope Works (Pty) Ltd		8,685.66	ZAR	1.00	14.00	16/02/2017	Bianca Du Toit		N	Α
	QT0000097	BOT0001	Bothas Networking inc	test	60.01	USD	10.00	14.00	10/11/2016	Bianca Du Toit		N	Α
	QT0000246	APP0001	Apple Juice Inc		920.00	ZAR	1.00	15.00	21/11/2018	Bianca Du Toit		N	Α
	QT0000237	APP0001	Apple Juice Inc	Copy of 1234	982.10	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		N	A
	QT0000120	HOP001	Hope Works (Pty) Ltd	Retest	21,931.32	USD	7.00	14.00	20/04/2017	Judith Mudzengi		N	A
	QT0000306	SWE0001	Sweets	Task Dafault the	2 704 50	740	1.0/		12/07/2020	Abigail Milne		N	Α
	QT0000312	BIG0001	Big Bargains Order	Generation -			6		×	Abigail Milne		N	Α
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	QT0000174	HOP001	Hope Works (Pty) Ltd	BPO Quote deta	513.00	ZAR	1.00	1.00	08/08/2017	Bianca Du Toit		N	A
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	QT0000249	APP0001	Apple Juice Inc	test	993.60	ZAR	1.00	15.00	09/01/2019	Bianca Surend		N	A
	QT0000180	SAM001	Samanthas Diner	USD, 0, 10, TYPE	171.54	USD	10.00	0.00	10/08/2017	Bianca Du Toit		N	A
	QT0000206	HOP001	Hope Works (Pty) Ltd	Test Links	1,593.96	ZAR	1.00	14.00	16/02/2018	Bianca Du Toit		N	A
	QT0000300	HOP001	Hope Works (Pty) Ltd	AB017	259,864.04	ZAR	1.00	15.00	03/06/2020	Bianca Du Toit	Cloned a quot	N	Α
		BOT0001	Bothas Networking inc	QT0000100	8,703.90	USD	10.00	14.00	02/02/2017	Judith Mudzengi		N	A

- 8. If your selection was **Yes**, then the second **Order Generation** message will confirm;
 - Do you wish to close the quote QT[quote number] off? No further orders will be possible from this quote if it is closed.
- 9. If you wish to proceed with the Order Generation, click on Yes.
 - Click on *No* to keep the quote open and listed in the screen. This will enable you to link *additional sales orders* to this quote, if required.



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	QT0000103	HOP001	Hope Works (Pt	y) Ltd		8,685.66	ZAR	1.00	14.00	16/02/2017	Bianca Du Toit		N	Α	
	QT0000097	BOT0001	Bothas Networki	ing inc	test	60.01	USD	10.00	14.00	10/11/2016	Bianca Du Toit		N	Α	
	QT0000246	APP0001	Apple Juice Inc			920.00	ZAR	1.00	15.00	21/11/2018	Bianca Du Toit		N	A	
	QT0000237	APP0001	Apple Juice Inc		Copy of 1234	982.10	ZAR	1.00	15.00	27/06/2018	Bianca Du Toit		N	A	
	QT0000120	HOP001	Hope Works (Pt	y) Ltd	Retest	21,931.32	USD	7.00	14.00	20/04/2017	Judith Mudzengi		N	A	
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	QT0000114	HOP001	Hope Works (P	4	possible from t	his quote if it i	is closed.				Bianca Du Toit	test	N	Α	
	QT0000266	HOP001	Hope Works (P								Bianca Du Toit		N	Α	
	QT000080	YES001	Young Electric				-		1		Bianca Du Toit	Test custom r	N	Α	
	QT0000277	APP0001	Apple Juice Inc		9			Yes	N	0	Bianca Du Toit		N	Α	
	QT0000174	HOP001	Hope Works (Pt	y) Ltd	BPO Quote deta	. 513.00	ZAR	1.00	1.00	08/08/2017	Bianca Du Toit		N	Α	
	QT0000320	OFF001	Office Supplies U	Unlimited	OSU1001	3,239.17	ZAR	1.00	15.00	22/02/2021	Sasha Jones	Full installation	N	Α	
	4				test	993.60	ZAR	1.00	15.00	09/01/2019	Bianca Surend		N	Α	
	QT0000249	APP0001	Apple Juice Inc					10.00	0.00	10/08/2017	Bianca Du Toit		N	A	
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•	QT0000249 QT0000180	SAM001	Samanthas Dine	y) Ltd			ZAR			16/02/2018	Bianca Du Toit Bianca Du Toit	Cloned a quot		A A	

- 10. If you have selected **Yes** to proceed, then the third **Order Generation** message will display;
 - Do you wish to view the order created, no. OR [order number]?
- 11. Click on **Yes** to display the generated quote in the Sales Orders listing screen.
 - Click on *No* to stay in the *Sales Quote* screen.

From the *Sales Quote* screen, navigate to the *Sales Orders* listing screen to view the created sales order.



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QT0000114 HOP001 Hope Works (Pty) Ltd Ves I/O+/2017 Bianca Du Toit test N QT0000266 HOP001 Hope Works (Pty) Ltd Vessol I/O+/2017 Bianca Du Toit N QT0000277 APP0001 Apple Juice Inc Yes No I/O8/2016 Bianca Du Toit N QT0000174 HOP001 Hope Works (Pty) Ltd BPO Quote deta 513.00 ZAR 1.00 15.00 9/06/2017 Bianca Du Toit N QT0000249 APP001 Hope Works (Pty) Ltd BPO Quote deta 513.00 ZAR 1.00 15.00 9/06/2017 Bianca Bur Toit N QT00001294 APP001 Apple Juice Inc test 993.60 ZAR 1.00 15.00 9/01/2019 Bianca Suredh N QT0000180 SAM001 Samanthas Diner USD, 0, 10, TYPE 171.54 USD 10.00 0.00 10/08/2017 Bianca Du Toit N	Α	N		Belinda Sharm	0/05/2018	003202	rested no OR00	the order c	with to view		Apple Juice Inc	APP0001	QT0000220
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QT0000277 APP0001 Apple Julce Inc Yes No V08/2019 Blanca Du Toit N QT0000174 HOP001 Hope Works (Pty) Ltd BPO Quote deta 513:00 ZAR 1.00 05/08/2017 Blanca Du Toit N QT0000174 HOP001 Hope Works (Pty) Ltd BPO Quote deta 513:00 ZAR 1.00 05/08/2017 Blanca Du Toit N QT0000320 OFF001 Office Supplies Unlimited OSU1001 3,239:17 ZAR 1.00 15:00 22/02/2021 Sasha Jones Full installation N QT0000249 APP0001 Apple Julce Inc test 993:60 ZAR 1.00 15:00 09/01/2019 Blanca Surend N QT0000189 SAM001 Samanthas Diner USD, 0, 10, TYPE 171:54 USD 10:00 0,00 10/08/2017 Blanca Du Toit N	Α	N		Bianca Du Toit	5/07/2019						Hope Works (Pty) Ltd	HOP001	QT0000266
QT0000277 APP0001 Apple Junce Inc BPO Quote deta 513:00 ZAR 1.00 100 08/08/2017 Bianca Du Toit N QT0000174 HOPP001 Hope Works (Pty) Ltd BPO Quote deta 513:00 ZAR 1.00 08/08/2017 Bianca Du Toit N QT0000200 OFF001 Office Supples Unlimited GSU1001 3,239:17 ZAR 1.00 15.00 20/2021 Sasha Jones Full installation N QT0000249 APP0001 Apple Juice Inc test 993.60 ZAR 1.00 15.00 9/01/2019 Bianca Surend N QT0000180 SAM001 Samanthas Diner USD, 0, 10, TYPE 171.54 USD 10.00 0.00 10/08/2017 Bianca Du Toit N	Α	Ν	Test custom r	Bianca Du Toit	1/09/2016			N.			Young Electric	YES001	QT000080
OT00003200 OFF001 Office Supplies Unlimited OSU1001 3,239.17 ZAR 1.00 15.00 2/20/2021 Sasha Jones Full installation N QT00003249 APP0001 Apple Juice Inc test 993.60 ZAR 1.00 15.00 9/01/2019 Blanca Surend N QT0000180 SAM001 Samanthas Diner USD, 0, 10, TYPE 171.54 USD 10.00 0.00 10/08/2017 Blanca Du Toit N	Α	N		Bianca Du Toit	1/08/2019	No	s	<u>Y</u> e		12	Apple Juice Inc	APP0001	QT0000277
QT0000249 APP0001 Apple Juice Inc test 993.60 ZAR 1.00 15.00 99/01/2019 Bianca Surend N QT0000180 SAM001 Samanthas Diner USD, 0, 10, TYPE 171.54 USD 10.00 0.00 10/08/2017 Bianca Du Toit N	Α	N		Bianca Du Toit	08/08/2017	1.00	1.00	ZAR	513.00	BPO Quote deta	Hope Works (Pty) Ltd	HOP001	QT0000174
QT0000180 SAM001 Samanthas Diner USD, 0, 10, TYPE 171.54 USD 10.00 0.00 10/08/2017 Bianca Du Toit N	Α	. N	Full installation	Sasha Jones	22/02/2021	15.00	1.00	ZAR	3,239.17	d OSU1001	Office Supplies Unlimited	OFF001	QT0000320
	Α	Ν		Bianca Surend	09/01/2019	15.00	1.00	ZAR	993.60	test	Apple Juice Inc	APP0001	QT0000249
	Α	Ν		Bianca Du Toit	10/08/2017	0.00	10.00	USD	171.54	USD, 0, 10, TYPE	Samanthas Diner	SAM001	QT0000180
Q10000206 HOP001 Hope works (Pty) Ltd Test Links 1,593.96 ZAR 1.00 14.00 16/02/2018 Blanca Du Toit	Α	N		Bianca Du Toit	16/02/2018	14.00	1.00	ZAR	1,593.96	Test Links	Hope Works (Pty) Ltd	HOP001	QT0000206
QT0000300 HOP001 Hope Works (Pty) Ltd AB017 259,864.04 ZAR 1.00 15.00 03/06/2020 Bianca Du Toit Cloned a quot N	Α	Ν	Cloned a quot	Bianca Du Toit	03/06/2020	15.00	1.00	ZAR	259,864.04	AB017	Hope Works (Pty) Ltd	HOP001	QT0000300
QT0000100 BOT0001 Bothas Networking inc QT0000100 8,703.90 USD 10.00 14.00 02/02/2017 Judith Mudzengi N	Α	N	1	Judith Mudzengi	02/02/2017	14.00	10.00	USD	8,703.90	QT0000100	Bothas Networking inc	BOT0001	QT0000100

FORWARD NAVIGATE BUTTON

The *Forward* navigation button is only available in the *Invoiced Quote* status after the Sales Quote has been Converted to Order. This feature enables the user to quickly navigate to related documentation. You can navigate to the Sales Orders listing screen where you can view the Sales Order that has been created from the selected Sales Quote.

- 1. From the *Sales Quotes* listing screen,
- 2. Change the Status to *Invoiced Quote* to display a list of all invoiced quotes.
- 3. Click on the *row* of the Invoiced Quote that you wish to view.
- 4. Click on *Forward*.



Add	Edit De Maintain	lete View	Forward Accepted	Rejected Convert Order	Clone Quote	_	bort Save Layo	out Worksp Format	Durb Daces Invo		Refresh		
-		here to group by				-					2		/
QuoteR	eference	CustomerCode	CustomerName	QuoteDescription	QuoteValue		ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments	QuoteStatus	Statu
OT0000	1238	TIA001	Titan Group	Copy of test	920.00	-	1.00		26/06/2018	Bianca Du Toit		T	A
QT0000		DER001	Derton / Technologies	test	21,208.86		1.00	14.00		Belinda Sharm		- I	A
QT0000		HOP001	Hope Works (Pty) Ltd	New Deal Rental	14, 196.75		1.00	15.00	14/03/2018	Bianca Du Toit	test	I	A
QT0000	092	HOP001	Hope Works (Pty) Ltd		4,745.59	ZAR	1.00	14.00	03/11/2016	Bianca Du Toit		I	A
QT0000	138	HOP001	Hope Works (Pty) Ltd	Generate Order	6,156.00	ZAR	1.00	14.00	25/05/2017	Bianca Du Toit		I	A
QT0000	161	PAN001	Panda Copiers		44.96	USD	10.00	14.00	07/08/2017	Bianca Du Toit		I	Α
QT0000	029	TIA001	Titan Group	Part Request ch	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm		I	A
QT0000	221	APP0001	Apple Juice Inc	C copy Test sou	81.94	ZAR	1.00	15.00	29/05/2018	Belinda Sharm		I	A
QT0000	075	BIG0001	Big Bargains	1557788	1,140.00	ZAR	1.00	14.00	09/08/2016	Bianca Du Toit		I	A
QT0000	0201	HOP001	Hope Works (Pty) Ltd	toner	984.96	ZAR	1.00	14.00	17/11/2017	Bianca Du Toit		I	Α
QT0000	015	WES001	Westwood Dynamic	COR 118596	45,894.06	ZAR	1.00	14.00	02/07/2014	Belinda Sharm	Installation - 2	I	A
QT0000	009	HOP001	Hope Works (Pty) Ltd	Test Project Me	1,801.94	ZAR	1.00	14.00	30/06/2014	Belinda Sharm	test project m	I	Α
QT0000	195	HOP001	Hope Works (Pty) Ltd	1234	34.20	ZAR	1.00	14.00	30/08/2017	Bianca Du Toit		I	Α
QT0000	0003	YES001	Young Electric	abc123	16,769.40	ZAR	1.00	14.00	06/05/2014	Karlien Jessic		I	Α
QT0000	052	HOP001	Hope Works (Pty) Ltd	test	4,674.00	ZAR	1.00	14.00	04/09/2015	Belinda Sharm		I	Α
QT0000	0066	DER001	Derton / Technologies	test cross refer	1,000.00	ZAR	1.00	14.00	23/11/2015	Belinda Sharm		I	Α
QT0000	218	HOP001	Hope Works (Pty) Ltd	test	483.00	ZAR	1.00	15.00	23/04/2018	Bianca Du Toit	test	I	Α
QT0000	0032	TIA001	Titan Group	test	1,154.27	ZAR	1.00	14.00	05/08/2014	Belinda Sharm		I	Α
QT0000	026	HOP001	Hope Works (Pty) Ltd	Test Edit Sales	21,208.86	ZAR	1.00	14.00	03/07/2014	Belinda Sharm		I	Α
QT0000	0012	OFF001	Office Supplies Unlimited	OR 14789	950.49	ZAR	1.00	14.00	02/07/2014	Belinda Sharm		I	Α
QT0000	035	DER001	Derton / Technologies	test	285.00	ZAR	1.00	14.00	25/09/2014	Belinda Sharm		I	A
QT0000	0006	SAM001	Samanthas Diner	123	20,811.44	ZAR	1.00	14.00	19/06/2014	Belinda Sharm		I	Α

- 5. You will navigate to the *Sales Orders* listing screen.
- 6. The Sales Order linked to the original Sales Quote will be highlighted / selected.

BACK NAVIGATION BUTTON

- 5. The *Back* navigation button is available and by clicking on it will return you to the *Sales Quotes* listing screen, or
- 6. If the *Forward* navigation button is available (not grayed out), then it indicates that further downstream process documents related to the selected order is available and you can thus navigate to those downstream documents, e.g. the linked **Sales Invoice**, the new deal **Call** or **Project**.



	Hom Hom Add Edit	e Equipment / Delete View	Locations Contract	Finance / HR II	Add Items New De			Print Sales Order	P	Service Re		Refresh	8
	Main	tain	Navigation		ocess	Form	nat	Graci	Print	-	Current		
-	7			8								//	
			up by that column	•	0	<u>, </u>						/	1
	OrderNo		CustomerName	OrderStatusDesc	OrderDescription	OrderValue		OrderDate	SalesmanName	ExchangeRate		OrderTime	DeptC
9	REC	REC	8 0 0	R C	ADC.	= ```	R C	=	*Oc		-	A C	RBC
	OR0000206	HOP001	Hope Works (Pty) Ltd	New order	Test	984.96		03/08/2017	Bianca Du Toit	1.00		01:06:12	
	OR0000207	NET001	Networking and Lapto	1	test	564.30		03/08/2017	Bianca Du Toit	1.00		01:10:42	
	OR0000212	HOP001	Hope Works (Pty) Ltd	New order	1234	628.27		07/08/2017	Bianca Du Toit	1.00		11:48:45	
	OR0000218	TIN001		New order	test	24,071.10		14/08/2017		1.00		11:18:17	
	OR0000220	BET0001 HOP001	Betties Summer Shop Hope Works (Ptv) Ltd		1234	23,029.07		21/08/2017	Blanca Du Toit	1.00		11:49:29	
	OR0000221 OR0000222	SAM001	Samanthas Diner	New order New order	test	4,745.59		04/09/2017	Bianca Du Toit Bianca Du Toit	1.00		14:49:36 02:50:18	
	OR0000222 OR0000224		Joes Carpentry Shop	New order	test	458.85		25/10/2017	Bianca Du Toit	1.00		02:50:18	
	OR0000224	HOP001	Hope Works (Pty) Ltd	New order	Generate Order	6,156.00		26/03/2018	Bianca Du Toit	1.00		11:39:12	_
-	OR0000244	HOP001	Hope Works (Pty) Ltd	New order	test	993.60		09/04/2018	Bianca Du Toit	1.00		10:18:06	_
	OR0000251	HOP001	Hope Works (Pty) Ltd	New order	test	575.00		23/04/2018	Bianca Du Toit	1.00		02:58:26	
	OR0000257	DER001	Derton / Technologies	New order		6,119,52		21/05/2018	Bianca Du Toit	1.00		14:16:30	
	OR0000279	APP0001	Apple Juice Inc	New order	C copy Test source	81.94		08/01/2019	Belinda Sharman	1.00		16:56:08	
	OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51	
	OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13	
	OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21	
	OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52	
	OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22	
	OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34	
	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46	
	OR0000294	HOP001	Hope Works (Pty) Ltd	New order	1234	864.00	ZAR	25/07/2019	Bianca Du Toit	1.00	15.00	10:12:42	
	020000297	NEW101	New Customer Test	New order	tect	150.00	7AR	17/09/2019	Rianca Du Toit	1.00	15.00	10-46-59	

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Help v2.5.1.4 - Pg 7 - Printed: 27/06/2024