

# 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**

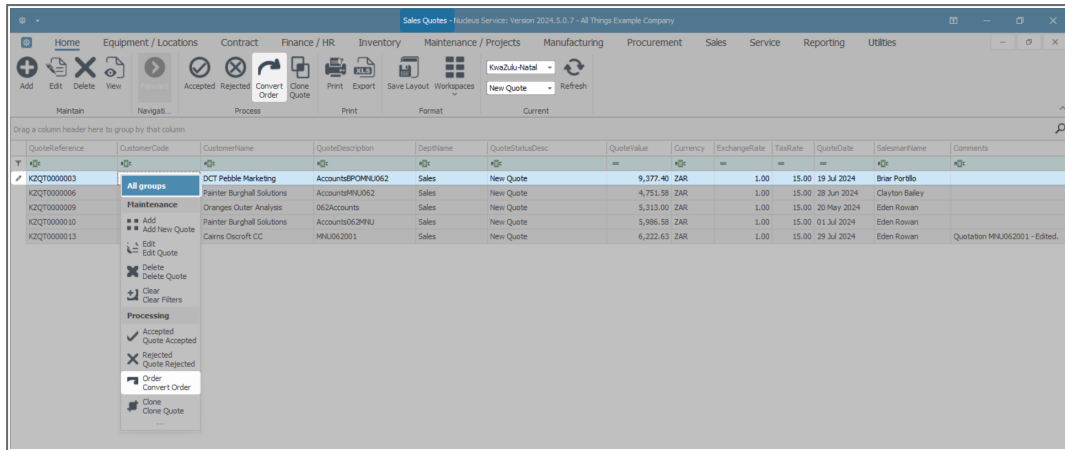
**Ribbon** Select **Sales > Quotes**



- The **Sales Quotes** listing screen will be displayed.
- Select the **Site** you wish to work in.
  - The example has **KwaZulu-Natal** selected.
- 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.
- Select the **row** of the quote you wish to **convert**.
- Click on **Convert Order**.

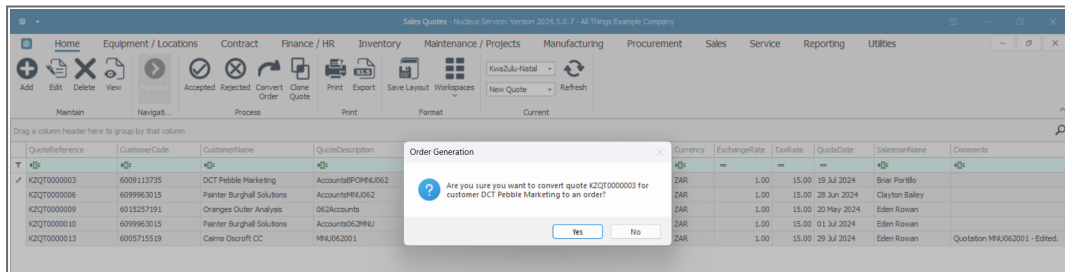


**Short cut key:** **Right click** on the selected **row** in the data grid to display the **All Groups** menu list. Click on **Convert Order**.



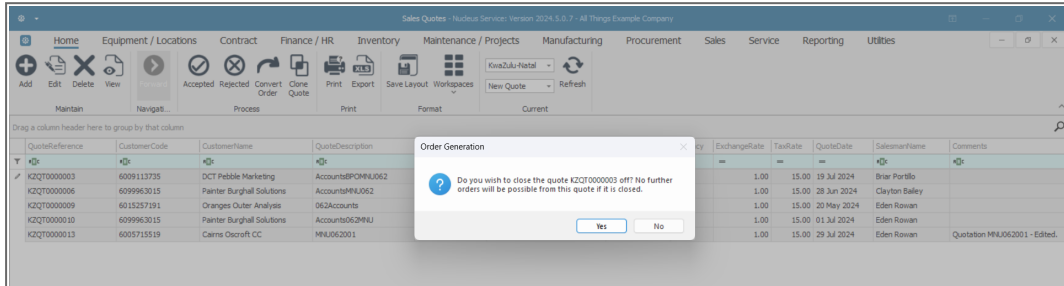
**?** You will receive three (3) Order Generation messages.

- When you receive the first **Order Generation** message to confirm
  - Are you sure you want to convert quote KZQT [ ] for customer [ ] to an order?
  - 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.

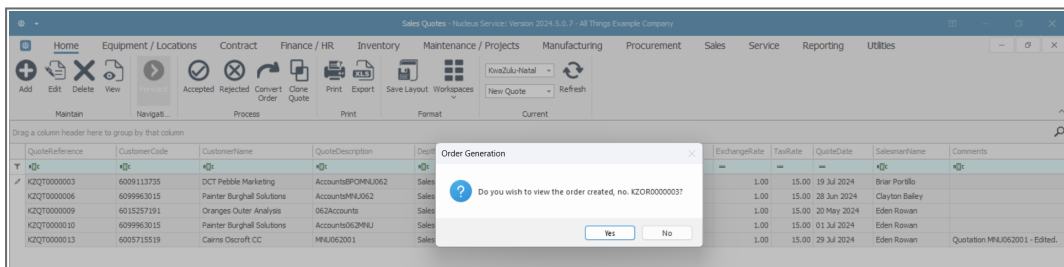


- If your selection was **Yes**, then the second **Order Generation** message will confirm -
  - Do you wish to close the quote KZQT [ ] off? No further orders will be possible from this quote if it is closed.

- 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.



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



- If you selected **Yes**, then the **Sales Orders** listing screen will open where you can view the **newly converted Order**.
- Refer to [Introduction to Orders](#) for further information on **Sales Orders**.

## FORWARD NAVIGATION BUTTON

### SALES QUOTES LISTING SCREEN

- 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.

- In the **Sales Quotes** listing screen -
- Change the Status to **Invoiced Quote** to display a list of all invoiced quotes.
- Select the **row** of the Invoiced Quote that you wish to view.
- Click on **Forward**.

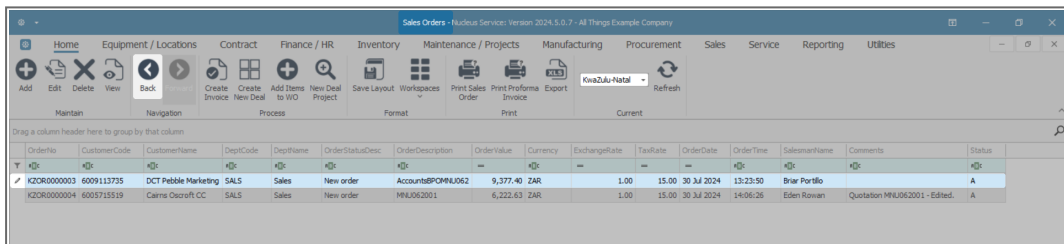
QuoteReference	CustomerCode	CustomerName	QuoteDescription	DeptName	QuoteStatusDesc	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments
K2Q7000003	6059113735	DCT Public Marketing	AccountsPROMU062	Sales	Invoiced Quote	9,377.49	ZAR	1.00	15.00	19 Jul 2024	Eriq Portillo	
K2Q7000008	6028148945	Q&L Media Distributors	WLU Invoicing	Sales	Invoiced Quote	4,261.58	ZAR	1.00	15.00	26 Jul 2024	Cal Saline	
K2Q7000013	6005719519	Cams Aircraft CC	WLU062001	Sales	Invoiced Quote	6,222.63	ZAR	1.00	15.00	29 Jul 2024	Eden Rowan	Quote on WLU062001 - Edited.

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

## BACK NAVIGATION BUTTON

### SALES ORDERS LISTING SCREEN

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



OrderNo	CustomerCode	CustomerName	DeptCode	DeptName	OrderStatusDesc	OrderDescription	OrderValue	Currency	ExchangeRate	TaxRate	OrderDate	OrderTime	SalespersonName	Comments	Status
✓ ICZOR000003	609113735	DCT Pebble Marketing	SALS	Sales	New order	AccountsRPOH062	9,377.40	ZAR	1.00	15.00	30 Jul 2024	13:23:50	Brian Portillo		A
ICZOR000004	605571519	Carro Oscarff CC	SALS	Sales	New order	MNU062001	6,222.63	ZAR	1.00	15.00	30 Jul 2024	14:06:26	Eden Rowan	Quotation MNU062001 - Edited.	A

### Related Topics

- [Add Quote](#)
- [Edit Quote](#)
- [Delete Quote](#)
- [View Quote](#)
- [Accept and Reject a Quote](#)
- [Print and Export a Sales Quote](#)
- [Forward Navigation](#)
- [Apply Project Methodology](#)
- [Clone a Quote](#)
- [Export a Quote](#)
- [Generate a Sales Order](#)

- [Creating a Quote from a Call](#)
- [Creating a Quote from a Project](#)
- [Link Quote Items to a Work Order](#)
- [CRM Basics - Quotes](#)
- [View Quote in CRM](#)
- [Add new Quote in Sales Studio](#)

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