

SALES

QUOTES - ACCEPTED

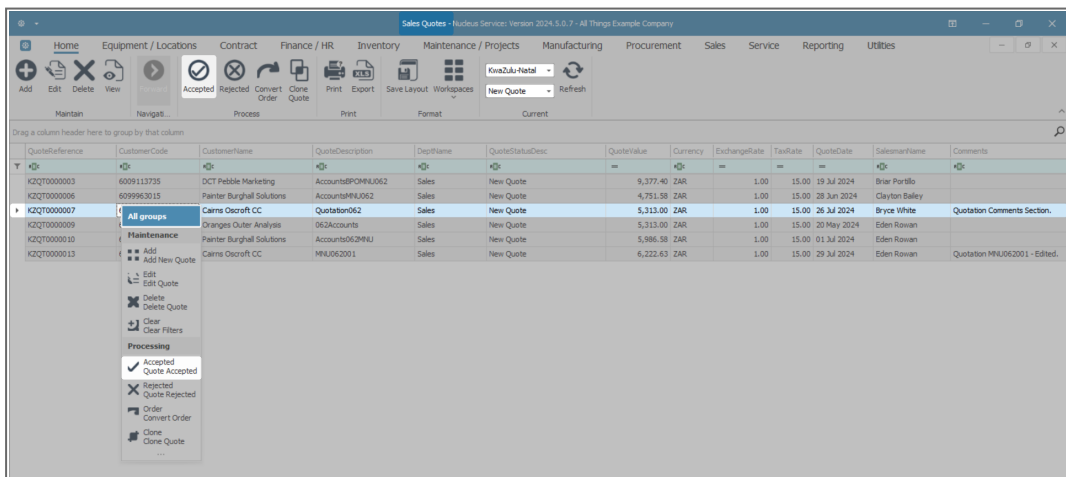
Ribbon Select Sales > Quotes



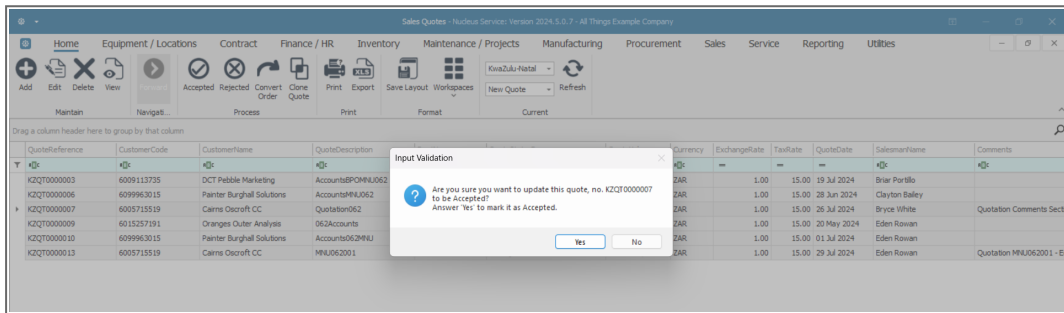
- The **Sales Quotes** listing screen will be displayed.
- Select the **Site** where the quote was created.
 - The example has **KwaZulu-Natal** selected.
- Sales Quotes can only be **Accepted** in the New Quote status.
 - Ensure the **Status** is set to **New Quote**.
- Select the **row** of the Quote you wish to convert to accepted.
- Click on **Accepted**.



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



- When you receive the **Input Validation** message to confirm -
 - **Are you sure you want to update this quote, no. KZQT[] to be Accepted? Answer 'Yes' to mark it as Accepted.**
- Click on **Yes**, if you are certain about your selection.
 - Clicking on **No** will ignore the request and leave the Quote in the New Quote status.



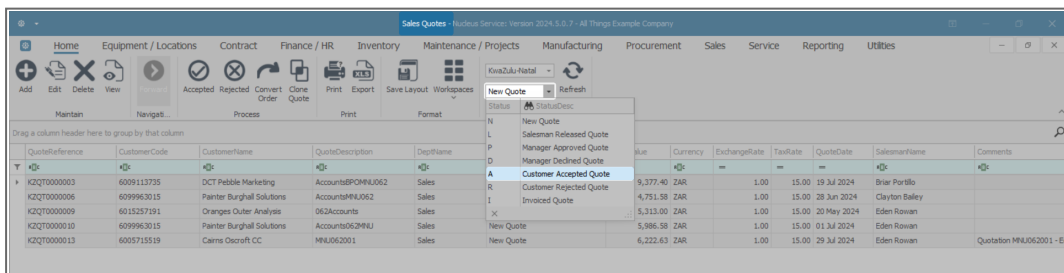
VIEW QUOTE IN ACCEPTED STATUS

- You will return to the **Sales Quotes** listing screen.



Note that the quote that has been Accepted will no longer be available in the New Quote Status list.

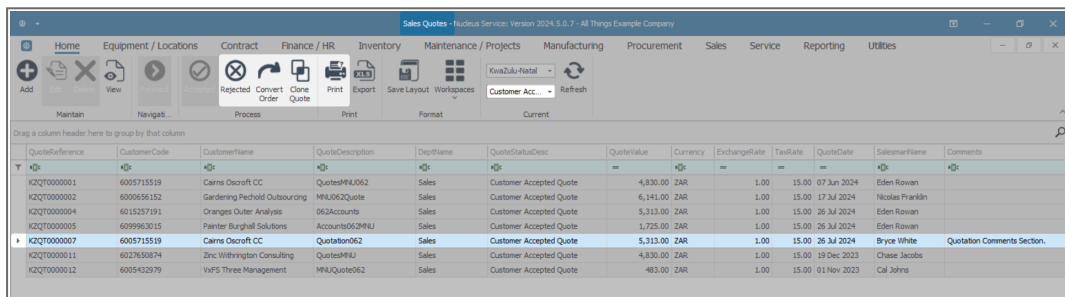
- Change the **Status** by clicking on the **drop-down arrow** to display the Status drop-down list.
- Click on **Customer Accepted Quote**.



- The **Sales Quotes** listing screen will be filtered using the **Customer AcceptedStatus** selection.

PROCESS ACTION BUTTONS

- From this screen you can choose to:
 - [Reject](#) the Quote.
 - [Convert to Order](#).
 - [Clone Quote](#).
 - [Print a Quote](#).



The screenshot shows the 'Sales Quotes' application interface. At the top, there is a navigation bar with various menu items like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the navigation bar is a toolbar with icons for actions such as Add, View, Rejected, Convert Order, Clone Quote, Print, Export, Save Layout, and Workspaces. The main area displays a table of sales quotes with columns for QuoteReference, CustomerCode, CustomerName, QuoteDescription, DeptName, QuoteStatusDesc, QuoteValue, Currency, ExchangeRate, TaxRate, QuoteDate, SalesmanName, and Comments. The table contains several rows of data, with the row for QuoteReference KQ2T000007 highlighted.

QuoteReference	CustomerCode	CustomerName	QuoteDescription	DeptName	QuoteStatusDesc	QuoteValue	Currency	ExchangeRate	TaxRate	QuoteDate	SalesmanName	Comments
KQ2T0000001	6005715519	Cairns Osicroft CC	Quote062	Sales	Customer Accepted Quote	4,830.00	ZAR	1.00	15.00	07 Jun 2024	Eden Rowan	
KQ2T0000002	600656152	Gardening Pechold Outsourcing	MNU062Quote	Sales	Customer Accepted Quote	6,141.00	ZAR	1.00	15.00	17 Jul 2024	Nicolas Franklin	
KQ2T0000004	6013257191	Oranges Outer Analysis	062Accounts	Sales	Customer Accepted Quote	5,313.00	ZAR	1.00	15.00	26 Jul 2024	Eden Rowan	
KQ2T0000005	6099963015	Painter Burghall Solutions	Account062MNU	Sales	Customer Accepted Quote	1,725.00	ZAR	1.00	15.00	26 Jul 2024	Eden Rowan	
KQ2T0000007	6005715519	Cairns Osicroft CC	Quotation062	Sales	Customer Accepted Quote	5,313.00	ZAR	1.00	15.00	26 Jul 2024	Bryce White	Quotation Comments Section.
KQ2T0000011	6027650874	Zinc Witherington Consulting	Quote062	Sales	Customer Accepted Quote	4,830.00	ZAR	1.00	15.00	19 Dec 2023	Chase Jacobs	
KQ2T0000012	6005432979	VVFS Three Management	MNUQuote062	Sales	Customer Accepted Quote	483.00	ZAR	1.00	15.00	01 Nov 2023	Cal Johns	

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](#)



Accepted Quote

- [CRM Basics - Quotes](#)
- [View Quote in CRM](#)
- [Add new Quote in Sales Studio](#)

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