

We are currently updating our site; thank you for your patience.

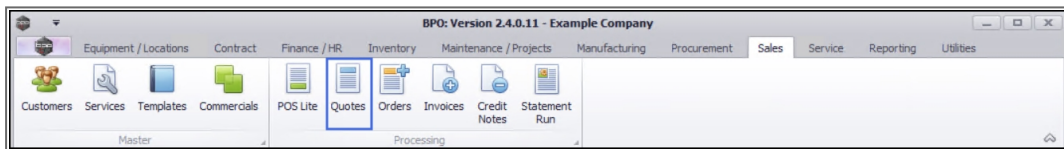
SALES

QUOTES – CONVERT TO ORDER

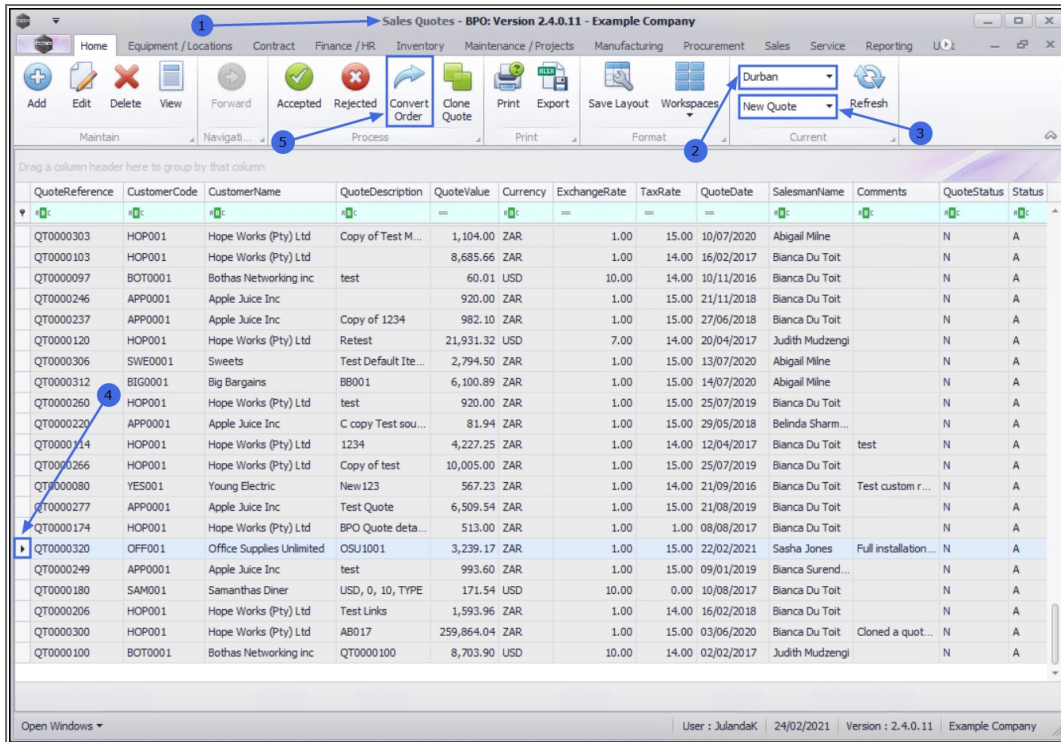
You can convert a Sales Quote to a Sales Order directly from the Sales Quotes listing screen when the quote is in Status:

- **New Quote** or
- **Customer Accepted Quote**

Ribbon Access: Sales > Quotes

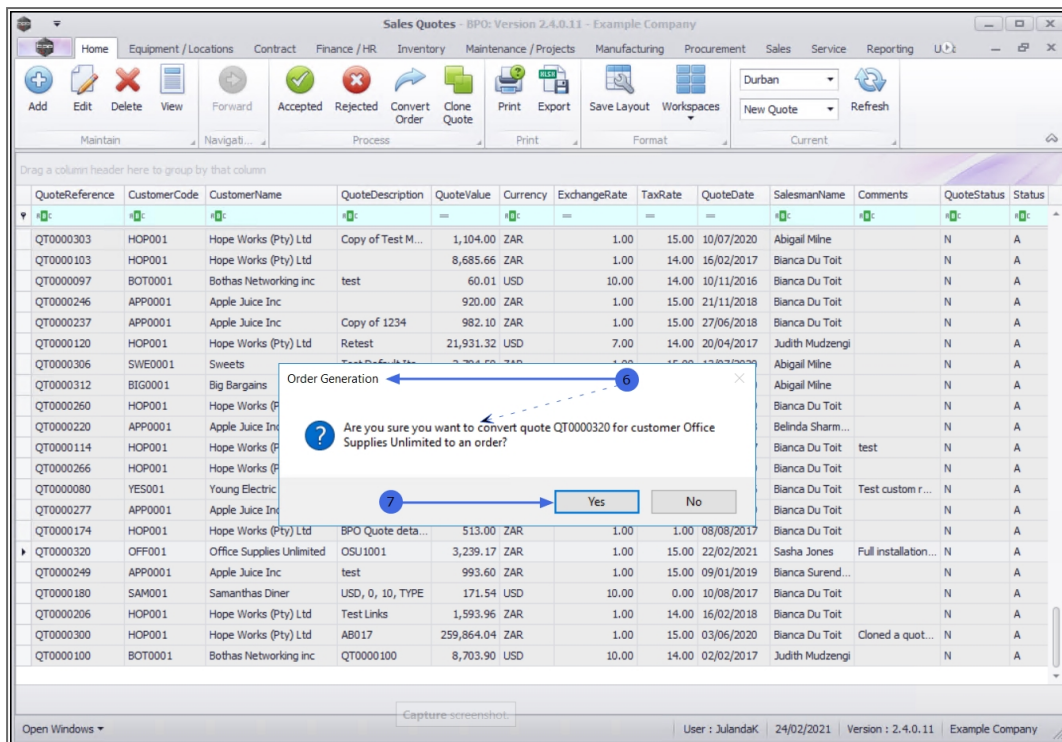


1. The **Sales Quotes** listing screen will display.
2. Select the **Site** you wish to work in.
 - The example has **Durban** selected.
3. A Sales Quote can only be Converted to a Sales order in the **New Quote** and **Customer Accepted Quote** status.
 - The example has **New Quote** selected.
4. Click on the **row** of the quote you wish to **convert**.
5. Click on **Convert Order**.



? 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.

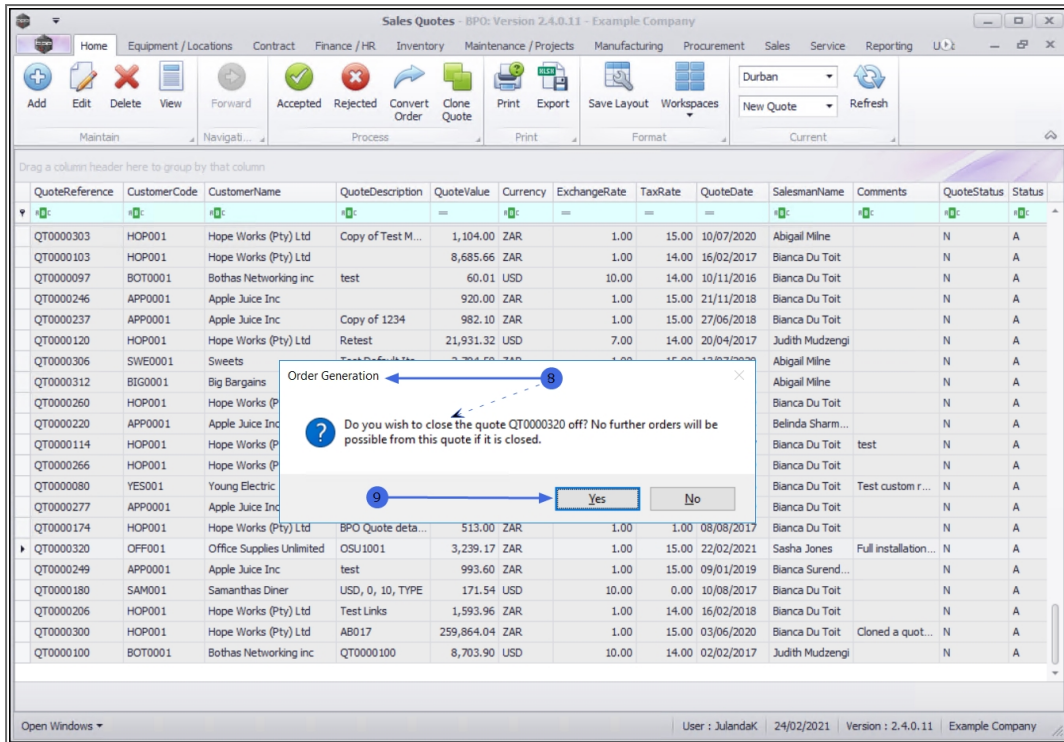


8. If your selection was **Yes**, then the second **Order Generation** message will confirm;

- Do you wish to close the quote QT[quote number] off? **No** further orders will be possible from this quote if it is closed.

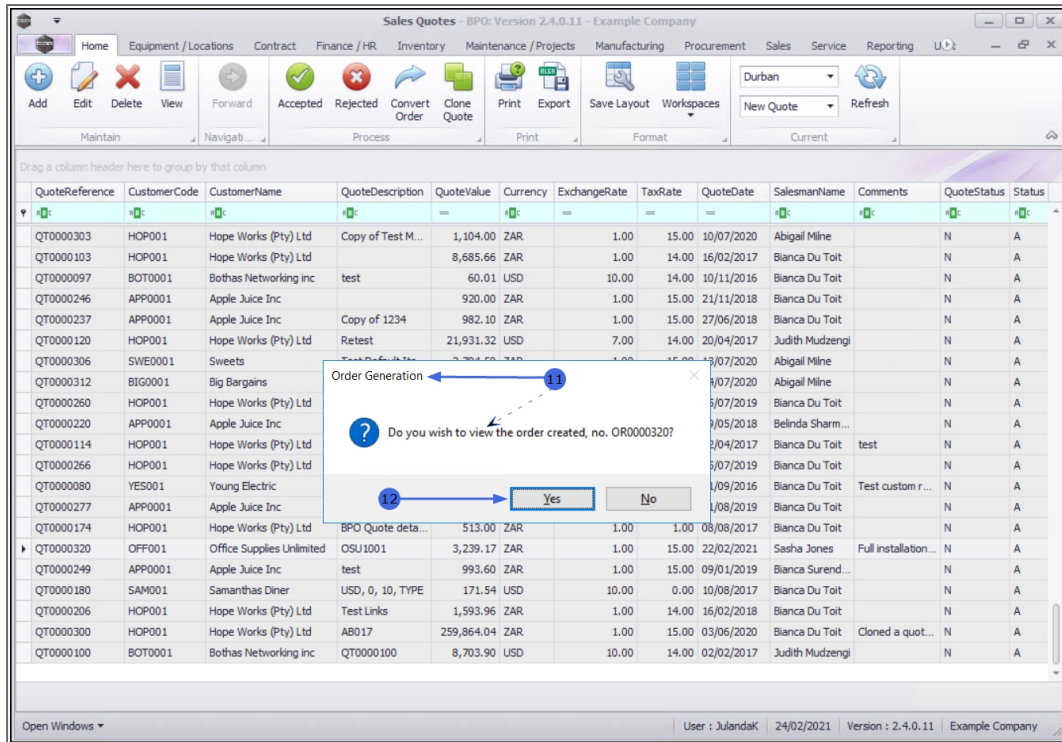
9. If you wish to proceed with the Order Generation, click on **Yes** .

- 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.



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.



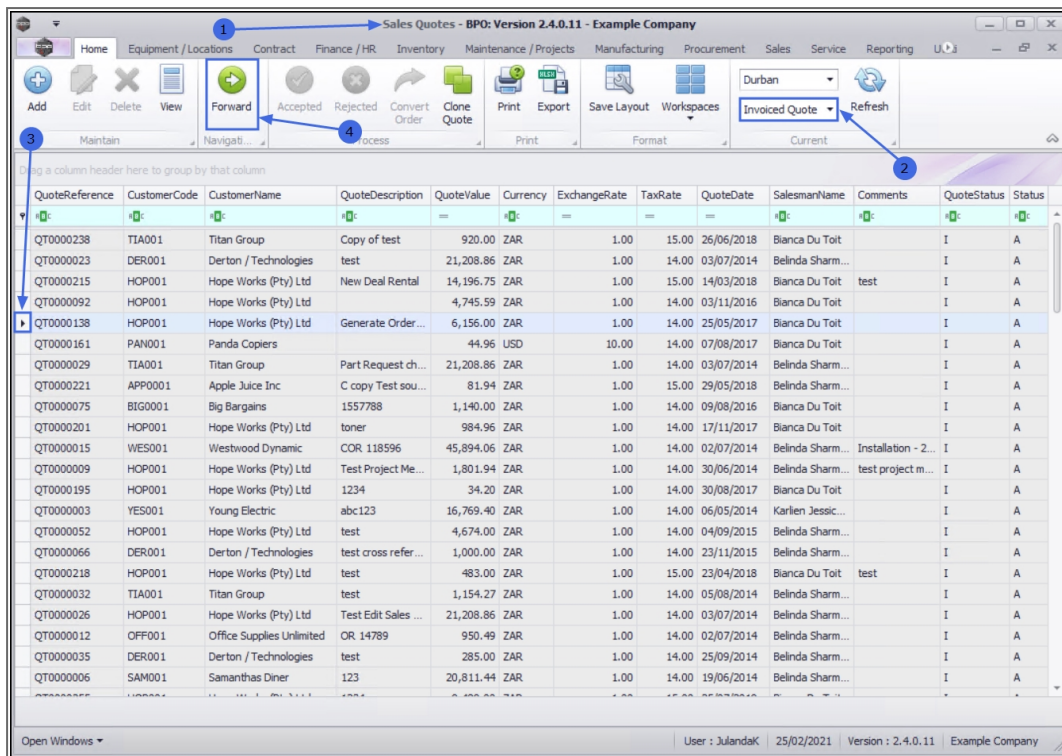
FORWARD NAVIGATE BUTTON

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*.



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**.

Sales Orders - BPO: Version 2.4.0.11 - Example Company

OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode
OR0000206	HOP001	Hope Works (Pty) Ltd	New order	Test	984.96	ZAR	03/08/2017	Bianca Du Toit	1.00	14.00	01:06:12	
OR0000207	NET001	Networking and Lapto...	New order	test	564.30	ZAR	03/08/2017	Bianca Du Toit	1.00	14.00	01:10:42	
OR0000212	HOP001	Hope Works (Pty) Ltd	New order	1234	628.27	ZAR	07/08/2017	Bianca Du Toit	1.00	1.00	11:48:45	
OR0000218	TIN001	Tinas Coffee Shop	New order	test	24,071.10	ZAR	14/08/2017	Bianca Du Toit	1.00	1.00	11:18:17	
OR0000220	BET0001	Betties Summer Shop ...	New order	1234	23,029.07	ZAR	21/08/2017	Bianca Du Toit	1.00	14.00	11:49:29	
OR0000221	HOP001	Hope Works (Pty) Ltd	New order		4,745.59	ZAR	04/09/2017	Bianca Du Toit	1.00	14.00	14:49:36	
OR0000222	SAM001	Samanthas Diner	New order	test	402.85	USD	04/09/2017	Bianca Du Toit	10.00	0.00	02:50:18	
OR0000224	JOE0001	Joes Carpentry Shop	New order	test	458.85	ZAR	25/10/2017	Bianca Du Toit	1.00	14.00	08:57:54	
OR0000243	HOP001	Hope Works (Pty) Ltd	New order	Generate Order - ...	6,156.00	ZAR	26/03/2018	Bianca Du Toit	1.00	14.00	11:39:12	
OR0000244	HOP001	Hope Works (Pty) Ltd	New order	test	993.60	ZAR	09/04/2018	Bianca Du Toit	1.00	15.00	10:18:05	
OR0000251	HOP001	Hope Works (Pty) Ltd	New order	test	575.00	ZAR	23/04/2018	Bianca Du Toit	1.00	15.00	02:58:26	
OR0000257	DER001	Derton / Technologies	New order		6,119.52	ZAR	21/05/2018	Bianca Du Toit	1.00	14.00	14:16:30	
OR0000279	APP0001	Apple Juice Inc	New order	C copy Test source	81.94	ZAR	08/01/2019	Belinda Sharman	1.00	15.00	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	
OR0000297	NEW101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59	

User: JulandaK | 25/02/2021 | Version: 2.4.0.11 | Example Company

MNU.062.002

