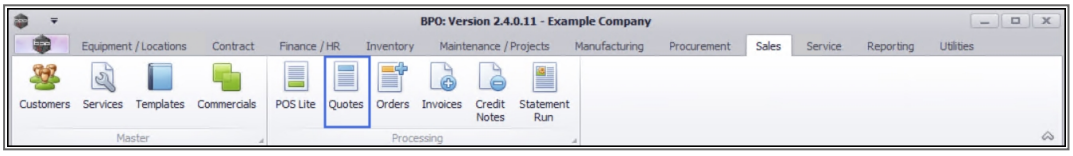
We are currently updating our site; thank you for your patience.

SALES

QUOTES - ACCEPTED

Ribbon Access: Sales > Quotes



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

Short cut key: Right click to display the **All groups** menu list. Click on **Accepted**.

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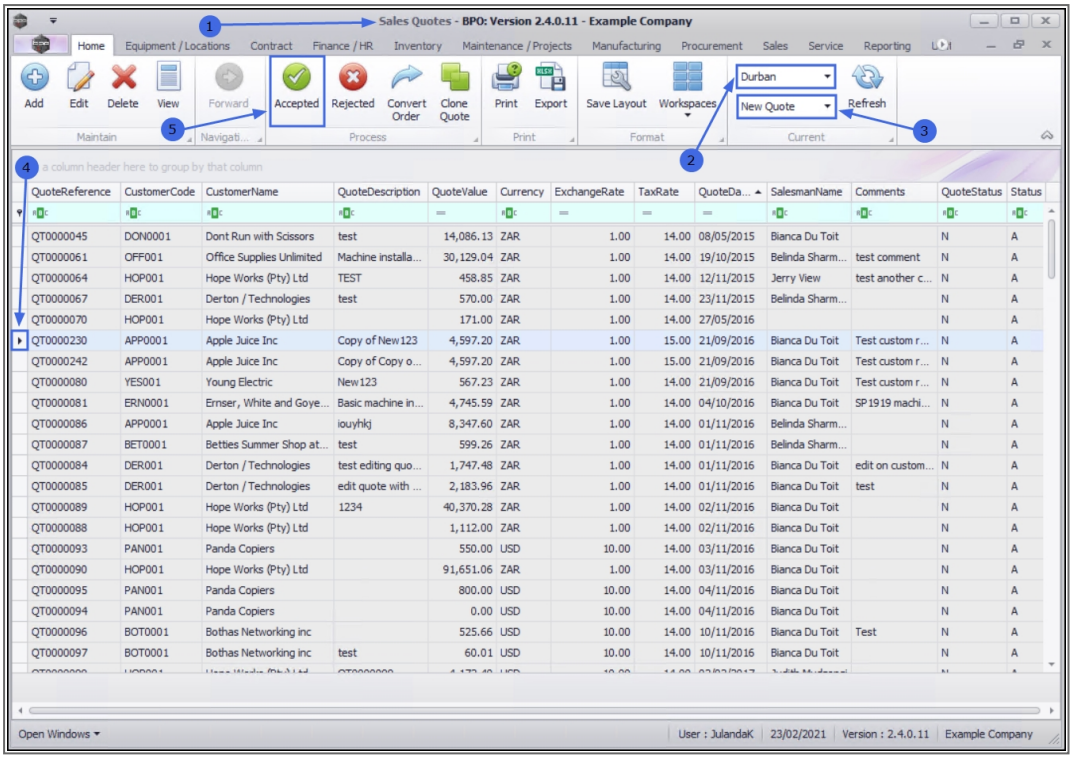

6. When you receive the **Input Validation** message to confirm;
    - **Are you sure you want to update this quote, no. QT** [quote number] **to be Accepted? Answer 'Yes' to mark it as Accepted.**
7. Click on **Yes**, if you are certain about your selection.
    - Clicking on **No** will ignore the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

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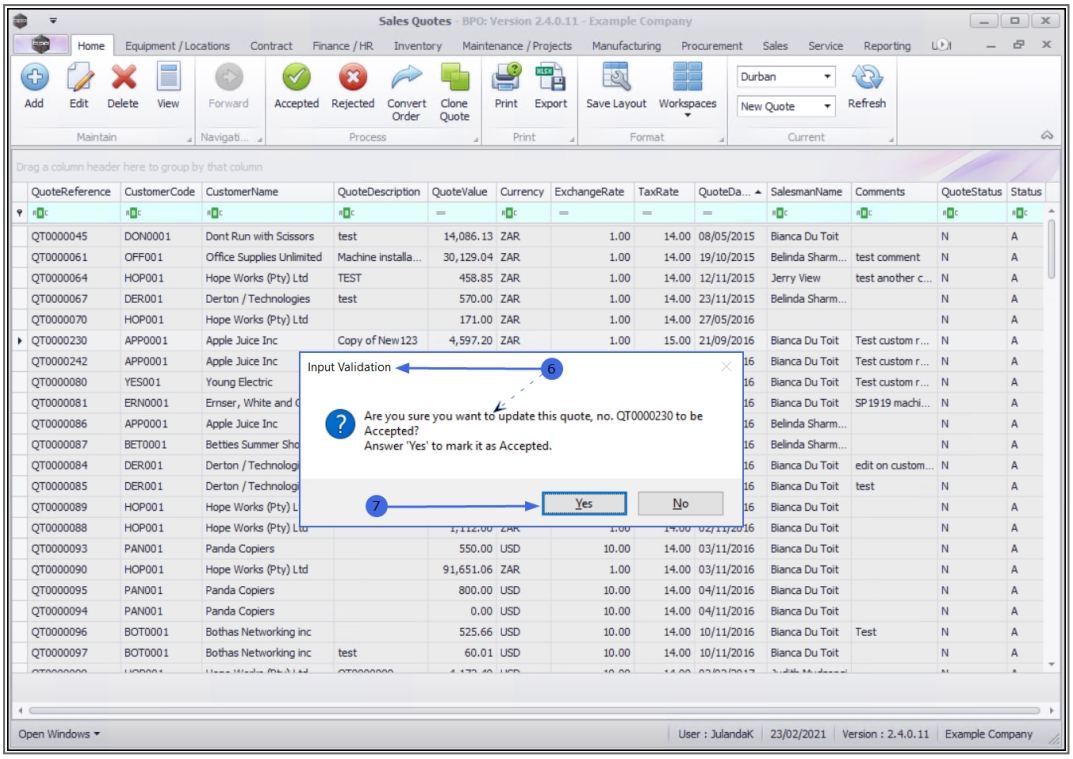

VIEW QUOTE IN ACCEPTED STATUS

1. 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.

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

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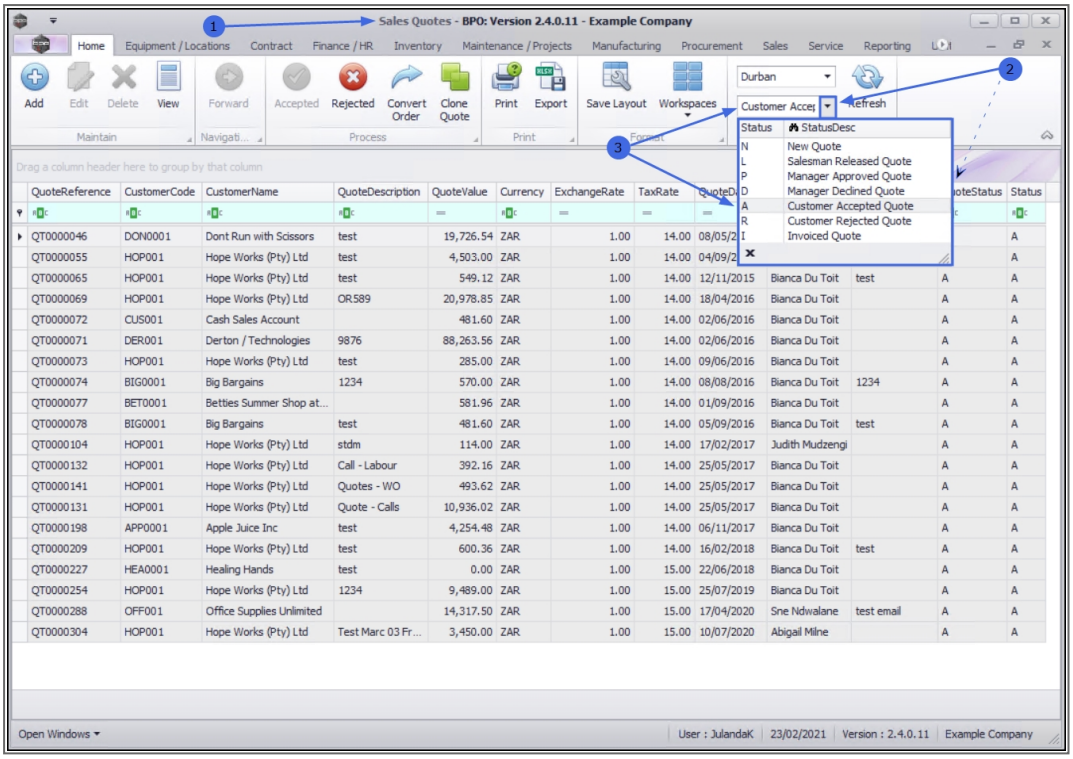

4. The **Sales Quotes** listing screen will be filtered using the **Customer Accepted** Status selection.

PROCESS ACTION BUTTONS

5. From this screen you can choose to;

    - Reject the Quote,
    - Convert to Order,
    - Clone Quote, or
    - Print a Quote

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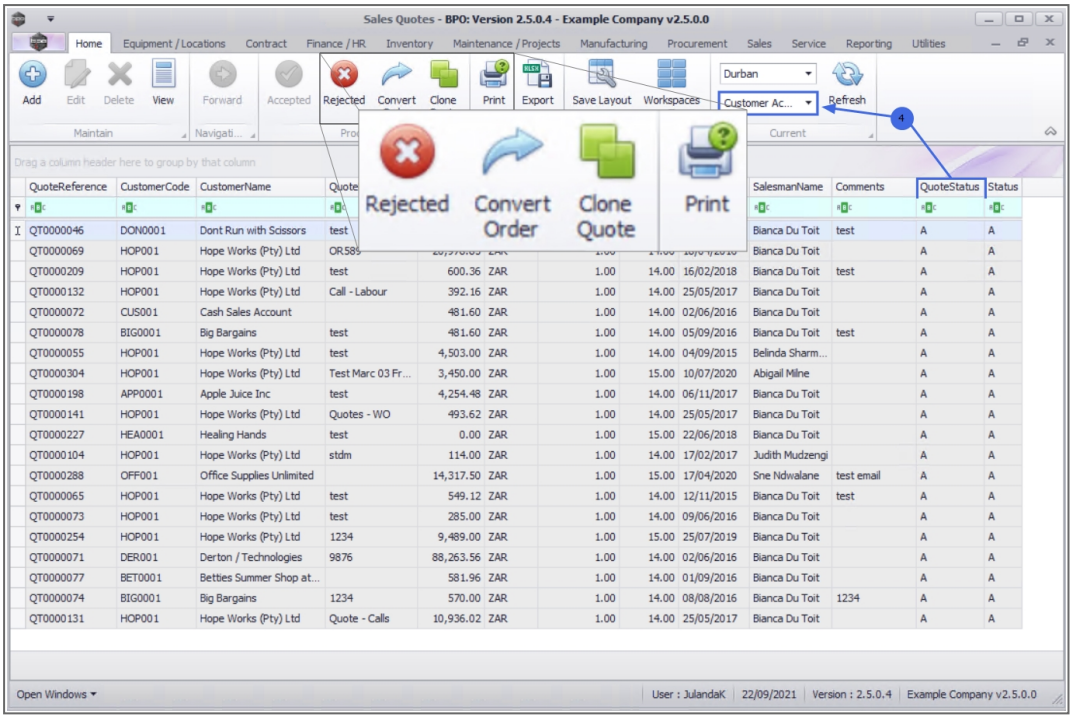

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