

Creating a New Sales Quote

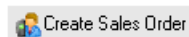
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If a Customer requests a price quote for Items they wish to order, you can provide a detailed statement in the form of a New Quote, which can be accessed from the Sales menu.

Aesthetically, the Sales Quote is nearly identical to the Sales Order, so please see that section if you have questions about filling out the form. Functionally, these two forms serve very different purposes:

- The Sales Quote is used when the Customer is merely inquiring about price, inventory, etc., and has not yet committed to purchasing.
- The Sales Order is used when the Customer has actually agreed to the purchase.

When you've completed the Sales Quote, a click of the Email button on the tab's toolbar will start a message to the customer with the quote included (in PDF format) as an attachment. Once the Customer okays the transaction, you can go right from Sales Quote to Sales Order by clicking the Create Sales Order button, also available on the tab's toolbar:



This will convert all information from a quote to an order, with zero need for retyping.
