Convert a Quote to a Sales Order

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A quote is entered into the system to document quoted prices to a customer. If the customer then commits to purchasing the goods/services, an order is created to properly manage the sale and inventory levels. When a quote is converted to an order, the goods identified on the order will be marked as "Assigned" in inventory.

The new order can quickly be created without reentering the information on the quote, using one of two processes. The option you choose depends on if you prefer to keep a copy of the original quote after it's been converted into an order.

Option A: Change the Original Quote to an Order
Option B: Copy the Original Quote to a New Order

Option A: Change the Original Quote to an Order

This option simply converts the original transaction from a quote to an order. A copy of the original quote is not kept.

1. Select **Processes > Sales > Sales Orders (Edit/Fill/Invoice)**.
2. Highlight the original quote and click **Edit**.
3. Change the Type field to **Order**.
4. Change the **Date** to the current date. If you are using different sequence numbers for quotes and orders, click on the Sequence icon in the **Order #** field. Select the appropriate sequence for orders.
5. Make any additional changes that were identified by the customer and click **Save**. If the **Print this order?** check box was selected on the Select tab, the order will print when the order is Saved.

Option B: Copy the Original Quote to a New Order

Using this option will copy the data from the original quote to a new order transaction. The original quote will continue to be saved as an open quote in the system.

1. Select **Processes > Sales > Sales Orders (Edit/Fill/Invoice)**.
2. Highlight the original quote and click **Copy**.
3. All of the information from the original quote will be copied to a new order. The **Date** will automatically be changed to the current date and the next available **Order #** (using the default sequence) will be assigned.
4. Make any additional changes that were identified by the customer and click **Save**. If the **Print this order?** check box was selected on the Select tab, the order will print when the order is Saved.

This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant.