

How to Process Quote to Sales Order

1. Open the Sales Order that you wish to process to Sales Order. If you need to create a new quote, refer to [How to Create Standard Quote](#)
2. Set the **Status** to **Won**. You will notice that the **Process** button will be enabled.
3. Upon changing the status to Won, the system will confirm if you want to immediately process the Quote to Sales Order.



iRely i21

Do you want to create a Sales Order for this Quote?

Yes

No

- a. Click **Yes** if you want to immediately convert this Quote to Sales Order. The Quote screen will be closed and the new Sales Order will be displayed.
- b. Click **No** if you want to convert it at a later date. In this case, you can use the **Process** button to convert the Quote to Sales Order.

Quote - ABC Reseller

New Save Search Delete Undo Print **Process** Duplicate Customer Close

Details Instructions Attachments (0) Audit Log (4) Comments (0)

Type:	Standard	Bill To:	ABC Reseller	Ordered By:	irelyadmin	Order No:	QU-21
Customer:	ABC Reseller	Ship To:	ABC Reseller	PO Number:		Salesperson:	Jared Sn
Date:	04/18/2016	Due:	05/18/2016	Ship Via:	UPS	Status:	Won
Location:	0001 - Fort Wayne	Terms:	5% 5, Net 30	BOL No:		Currency:	USD
				Template		Split:	
						Comments:	Sample Quote.

Here is sample processed Quote and its Sales Order.

Quote - ABC Reseller

New Save Search Delete Undo Print Blend Process Duplicate Recurring Close

Details

Instructions

Attachments (0)

Audit Log (3)

Comments (0)

Approval (0)

Type: Standard Bill To: ABC Reseller PO Number: Order No: QU-49

Customer: ABC Reseller Ship To: ABC Reseller BOL No: Split:

Date: 6/30/2016 Ordered By: irelyadmin Status: Won Salesperson: Jared Smith

Due Date: 7/30/2016 Ship Via: UPS Template Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Expiration: Comments: Won Quote

+ Insert Open Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group
87G	87 Unleaded Ga...	Gallon	1.00	10.00%	0.23	1.850000	1.66	IN SST
	sample misc item		1.00	0.00%	0.00	10.500000	10.50	
			0.00	0.00%	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United States

Item: On Hand: On Order (PO):

Ship To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United States

Committed: Back Order:

Quote: Preliminary Quote: Price Only Price and Quantity

Subtotal: 12.16 Shipping: 0.00 Tax: 0.23 Total: 12.39

Processed Page 1 of 1

Sales Order - ABC Reseller

New Save Search Delete Undo Print Blend Pick Ticket Pick List Ship Invoice Duplicate Recurring Close

Details

Instructions

Payments (0)

Attachments (0)

Audit Log (0)

Comments (0)

Approval (0)

Type: Standard Recurring: Bill To: ABC Reseller PO Number: Order No: SO-165

Customer: ABC Reseller Ship To: ABC Reseller BOL No: Split:

Date: 6/30/2016 Ordered By: irelyadmin Status: Open Salesperson: Jared Smith

Due Date: 7/30/2016 Ship Via: UPS Freight Term: Currency: USD

Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Comments: Won Quote

+ Insert Open Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Contract No	Contract Sequence	Description	UOM	Shipped	Ordered	Discount	Tax	Price	Total	Tax Group
87G			87 Unleaded Ga...	Gallon	0.00	1.00	10.00%	0.23	1.850000	1.66	IN SST
			sample misc ite...		0.00	1.00	0.00%	0.00	10.500000	10.50	
					0.00	0.00	0.00%	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United States

Item: On Hand: On Order (PO):

Ship To: ABC Reseller Somewhere St. Indianapolis, IN, 46204 United States

Committed: Back Order:

Quote: Subtotal: 12.16 Shipping: 0.00 Tax: 0.23 Total: 12.39

Ready Page 1 of 1

1. Open the Sales Order that you wish to process to Sales Order.
2. Set the **Status** to **Won**. You will notice that the **Process** button will be enabled.
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Do you want to create a Sales Order for this Quote?

Yes

No

- a. Click **Yes** if you want to immediately convert this Quote to Sales Order. The Quote screen will be closed and the new Sales Order will be displayed.

- b. Click **No** if you want to convert it at a later date. In this case, you can use the **Process** button to convert the Quote to Sales Order.

Quote - ABC Reseller

New Save Search Delete Undo Print **Process** Duplicate Customer Close

Details Instructions Attachments (0) Audit Log (4) Comments (0)

Type: Standard Bill To: ABC Reseller Ordered By: irelyadmin Order No: QU-21
Customer: ABC Reseller Ship To: ABC Reseller PO Number: Salesperson: Jared Smith Status: Won
Date: 04/18/2016 Due: 05/18/2016 Ship Via: UPS BOL No: Split: Currency: USD
Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Template Comments: Sample Quote.

Here is sample processed Quote.

Quote - ABC Reseller

New Save Search Delete Undo Print Process Duplicate Customer Close

Details Instructions Attachments (0) Audit Log (5) Comments (0)

Type: Standard Bill To: ABC Reseller Ordered By: irelyadmin Order No: QU-21
Customer: ABC Reseller Ship To: ABC Reseller PO Number: Salesperson: Jared Smith Status: Won
Date: 04/18/2016 Due: 05/18/2016 Ship Via: UPS BOL No: Split: Currency: USD
Location: 0001 - Fort Wayne Terms: 5% 5, Net 30 Template Comments: Sample Quote.

+ Insert Q Open X Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Discount	Tax	Price	Total	Tax Group
87G	87 Unleaded Gasoline	Gallon	1.00	0.00%	0.00	1.850000	1.85	
	sample misc item		1.00	0.00%	0.00	10.500000	10.50	
			0.00	0.00%	0.00	0.000000	0.00	

Bill To: ABC Reseller Somewhere St. Indianapolis, IN. 46204 Item: On Hand: On Order (PO): Committed: Back Order: Quote: Preliminary Quote: Subtotal: 12.35 Shipping: 0.00 Tax: 0.00 Total: 12.35

Ship To: ABC Reseller Somewhere St. Indianapolis, IN. 46204

Processed Page 1 of 1

1. Open the Sales Order that you wish to process to Sales Order.
2. Set the **Quote Status** to **Won**. You will notice that the Process toolbar button will be enabled.

Quote - ABC Reseller

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments (0) Audit Log (2) Comments (0)

Customer: ABC Reseller Ship To: ABC Reseller Ordered By: irelyadmin Quote No: QU-2
Date: 01/20/2016 Due: 01/25/2016 Bill To: ABC Reseller PO Number: Status: Pending
Location: 0001 - Fort Wayne Ship Via: Truck BOL No: Currency: Quote Status: Pending
Salesperson: Mike Moriarty Terms: 5% 5 Net 30 Template: Comments: Pending
Expired

+ Insert Q Open X Remove Add Recipe Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Discou...	Tax	Price	Lost
87G	87 Unleaded Gasoline	Gallon	100.00	0.00%	14.80	1.850000	185.00 IN SST
	sample misc item		1.00	0.00%	0.00	10.500000	10.50
			0.00	0.00%	0.00	0.000000	0.00

Bill To: ABC Reseller Somewhere St. Indianapolis, IN. 46204 United Item: On Hand: On Order (PO): Preliminary Quote: Subtotal: 195.50
Ship To: ABC Reseller Somewhere St. Indianapolis, IN. 46204 United Committed: Back Order: Shipping: 0.00
Tax: 14.80
Total: 210.30

Ready Page 1 of 1

3. Upon changing the status to Won, the system will confirm if you want to immediately process the Quote to Sales Order.



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Do you want to create a Sales Order for this Quote?

Yes

No

- a. Click **Yes** if you want to immediately convert this Quote to Sales Order. The Quote screen will be closed and the new Sales Order will be displayed.
- b. Click **No** if you want to convert it at a later date. In this case, you can use the **Process toolbar button** to convert the Quote to Sales Order.

Quote - ABC Reseller

New Save Search Delete Undo **Process** Duplicate Customer Close

Details Attachments (0) Audit Log (2) Comments (0)

Customer: ABC Reseller Ship To: ABC Reseller Ordered By: irelyadmin Quote No: QU-2

Date: 01/20/2016 Due: 01/25/2016 Bill To: ABC Reseller PO Number: Status: Won

Location: 0001 - Fort Wayne Ship Via: Truck BOL No: Currency: USD Split:

Here is sample processed Quote.

Quote - ABC Reseller

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments (0) Audit Log (3) Comments (0)

Customer: ABC Reseller Ship To: ABC Reseller Ordered By: irelyadmin Quote No: QU-2

Date: 01/20/2016 Due: 01/25/2016 Bill To: ABC Reseller PO Number: Status: Won

Location: 0001 - Fort Wayne Ship Via: Truck BOL No: Currency: USD Split:

Salesperson: Mike Moriarty Terms: 5% 5 Net 30 Template: Comments: Sample Quote.

Item No	Description	UOM	Ordered	Discou...	Tax	Price	Total	Tax Gro...	Commen
87G	87 Unleaded Gasoline	Gallon	100.00	0.00%	14.80	1.850000	185.00	IN SST	
	sample misc item		1.00	0.00%	0.00	10.500000	10.50		
			0.00	0.00%	0.00	0.000000	0.00		

Bill To: ABC Reseller Somewhere St. Indianapolis, IN 46204 United Item: On Hand: On Order (PO): Preliminary Quote: Subtotal: 195.50

Ship To: ABC Reseller Somewhere St. Indianapolis, IN 46204 United Committed: Back Order: Shipping: 0.00

Tax: 14.80

Total: 210.30

Processed Page 1 of 1

1. Open the Quote that you wish to process to Sales Order.

- Set the **Quote Status** to **Won**. You will notice that the Process toolbar button will be enabled.

Quote - ABC Reseller

Customer: 0001005066 Ship To: ABC Reseller Ordered By: irelyadmin Quote No: QU-3

Date: 01/20/2016 Due: 01/20/2017 Bill To: ABC Reseller PO Number: PO#04 Status: Pending

Location: 0001 - Fort Wayne Ship Via: Truck BOL No: Currency: Quote Status

Salesperson: 0001005049 Terms: Due on Receipt Template: Comments: Pending

Insert View Remove Get Previous Details Layout Filter Records (F3)

Item No	Description	UOM	Mainten...	Frequen...	Start Date	Ordered	Lost
87G	87 Unleaded Gasoline	Gallon				10.00	0.00
	sample misc item					5.00	0.00
						0.00	0.00

Bill To: ABC Reseller Somewhere St. Fortville, IN, 46040, United States Item: On Hand: On Order (PO): Preliminary Quote: Subtotal: 34.30

Ship To: ABC Reseller Somewhere St. Fortville, IN, 46040, United States Committed: Back Order: Shipping: 0.00

Tax: 1.30 Total: 35.60

Ready Page 1 of 1

- Upon changing the status to Won, the system will confirm if you want to immediately process the Quote to Sales Order.

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Do you want to create a Sales Order for this Quote?

Yes No

- Click **Yes** if you want to immediately convert this Quote to Sales Order. The Quote screen will be closed and the new Sales Order will be displayed.
- Click **No** if you want to convert it at a later date. In this case, you can use the **Process** toolbar button to convert the Quote to Sales Order.

Quote - ABC Reseller

Customer: 0001005066 Ship To: ABC Reseller Ordered By: irelyadmin Quote No: QU-3

Date: 01/20/2016 Due: 01/20/2017 Bill To: ABC Reseller PO Number: PO#04 Status: Won

Location: 0001 - Fort Wayne Ship Via: Truck BOL No: Currency: USD Split:

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments Audit Log

- Open the Quote that you wish to process to Sales Order.
- Set the **Quote Status** to **Won**. You will notice that the Process toolbar button will be enabled.

Quote - Home Dealers

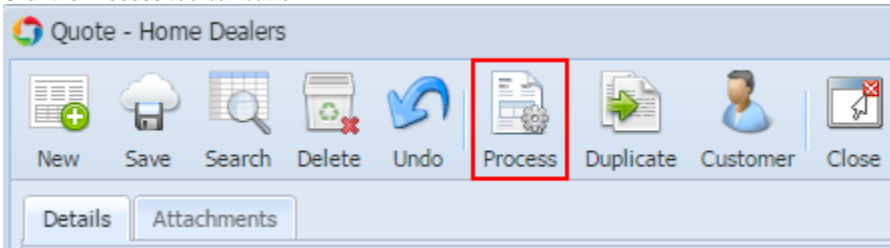
Customer: HOMEDEALER Location: 1000-Location A Date: 06/30/2015 Currency: USD Quote Status: Won Quote No: QU-1

Bill To: US Ship To: US Template: PO Number:

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments

3. Click the **Process** toolbar button.



The Quote screen will be closed and the new Sales Order will be displayed.

Sales Order - Home Dealers

New Save Search Delete Undo Process Duplicate Customer Close

Details Attachments

Customer: HOMEDEALER Location: 1000-Location A Date: 06/30/2015 Currency: USD BOL No: Order Status: Open Order No: SO-1

Bill To: US Ship To: US

US 18 Central St. Edison, OH, 43320

Salesperson: JAS PO Number:

Ship Via: UPS Ground Terms: Due 28th of the Month

Ordered By: AGADMIN Due Date: 07/28/2015

Comments: This is sample Quote. Freight Terms: Split:

Insert View Remove Layout Filter Records (F3)

Item No	Description	UOM	Ordered	Shipped	Discoun...	Tax	Price	Total
Bag	Inventory Type	Dozen	2.00	0.00	0.00	0.00	22.00	44.00
	sample miscellaneous item		1.00	0.00	0.00	0.00	55.00	55.00
			0.00	0.00	0.00	0.00	0.00	0.00

Item: On Hand: On Order (PO): Committed: Back Order:

Subtotal: 99.000000
Shipping: 0.000000
Tax: 0.000000
Total: 99.000000

Ready Page 1 of 1