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.

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.

Here is sample processed Quote and its Sales Order.

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

Here is sample processed Quote.

1. Open the Sales Order that you wish to process to Sales Order.
2. Set the **Quote Statu**s to **Won**. You will notice that the Process toolbar 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.

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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.

Here is sample processed Quote.

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

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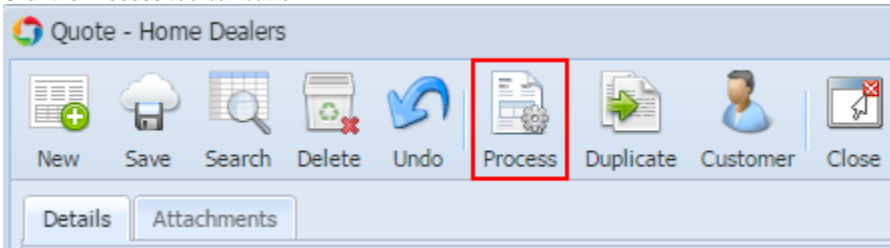2. Set the **Quote Status** to **Won**. You will notice that the Process toolbar button will be enabled.

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

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