Training Document
How to Convert a Quote to an Invoice

Accredo
taking care of business

In this lesson you will learn about using the Accredo system.
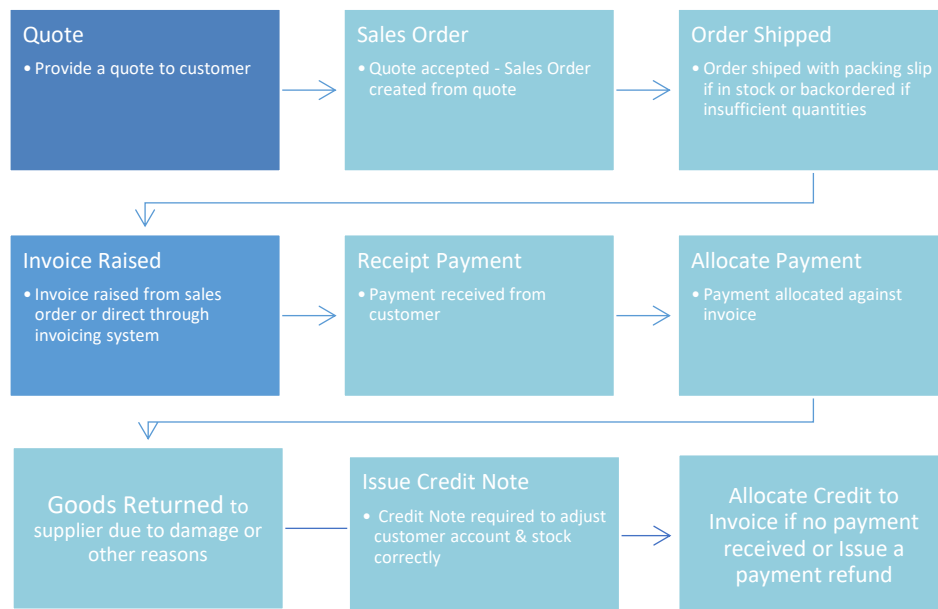
After completing this lesson you will be able to:

- Convert a Quote to an Invoice

Contents

Process flow

Quote		Sales Order		Order Shipped
• Provide a quote to customer	→	• Quote accepted - Sales Order created from quote	→	• Order shiped with packing slip if in stock or backordered if insufficient quantities

Invoice Raised		Receipt Payment		Allocate Payment
• Invoice raised from sales order or direct through invoicing system	→	• Payment received from customer	→	• Payment allocated against invoice

Goods Returned to supplier due to damage or other reasons		Issue Credit Note		Allocate Credit to Invoice if no payment received or Issue a payment refund
		• Credit Note required to adjust customer account & stock correctly	→	

Converting Quotes to Invoices

- To convert a quote to an invoice or an order you need to find the quote
- Maintain\Invoicing system\Invoice List – change the selection to quote and locate the required document and open it.
- Click on Invoice from Quote ![icon] (Alt + Q)

Contact

For further information or for assistance with Accredo please do get in touch with us.

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