

Training Document – How to Create a Quotation Request and Turn into a PO



In this lesson you will learn about using the Accredo system.

After completing this lesson, you will be able to:

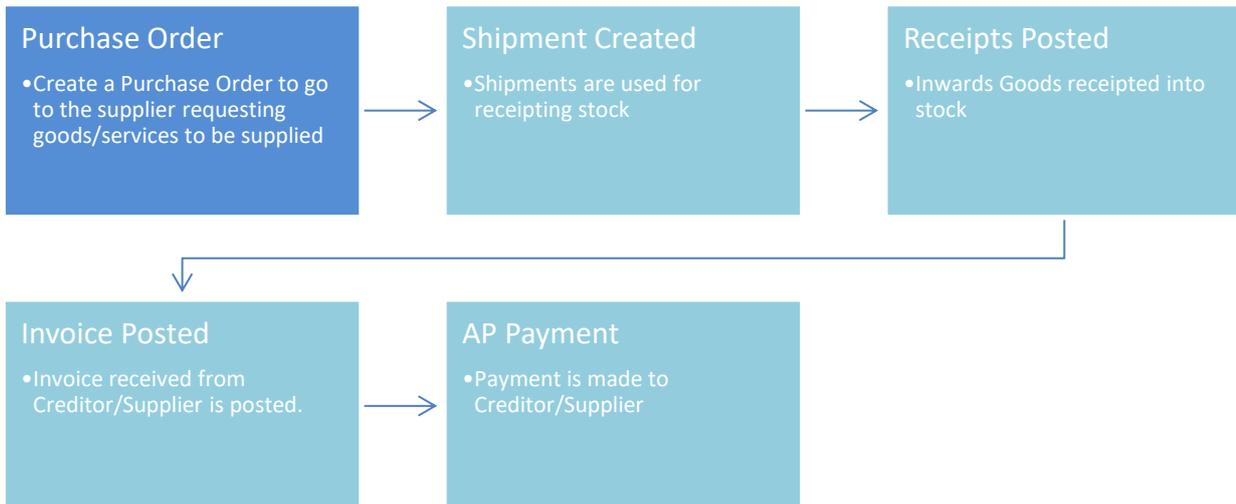
- Create a Quote request, and turn this into a purchase order.

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Purchase Order to Invoice Process

Process flow



Purchase Orders - Quotations

Quotation Request Creation

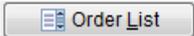
Creating a quotation request will enable a quotation to be sent to multiple suppliers with relative ease.

- **Tasks / Purchase Orders / Enter Purchase Orders:**
- Select Quotation Request from List.
- Enter Data into the appropriate fields just like a Purchase Order.
- Click Save if you wish to edit the quotation at a later date; or Click the Print Icon
- **Duplicate and Repeat:**
- Select the Duplicate button (Shift+F4). 
- Select Quotation Request. This will create a duplicate of the quotation request in which you can change the creditor.

Repeat this until copies have been created, saved and printed for each of the creditors you wish to request a quote from.

Quotation Request Acceptance

Once you have decided on a quote to accept, you can generate a Purchase Order from the relevant Quotation Request.

- **Tasks / Purchase Orders / Enter Purchase Orders:**
- Select Quotation Request from List.
- Click Order List. 
- Filter the list by Selecting the Creditor from the dropdown list.
- Double click on the related quote from the list below.
- Click on the Order from Quote button (Alt+O) 
- Enter the appropriate authorization code and password and click ok.
- The Purchase Order has now been created.

You now need to delete the quotation requests that were rejected.

- **Follow the first four steps above, then:**
- Select the quotation request to be removed and click the delete button (F3). 
- Repeat for the other quotes to be deleted.

Contact

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

Offices

New Zealand (+64)

Tauranga..... 07 544 4488

Wellington..... 04 282 1534

Email Helpdesk@ZealSystems.co.nz

Australia (+61)

Melbourne..... 03 9016 3410

Sydney..... 02 9098 0996

Brisbane..... 07 3088 4989

Email Helpdesk@ZealSystems.com.au