Training Document
How to Create an Order from a Quote

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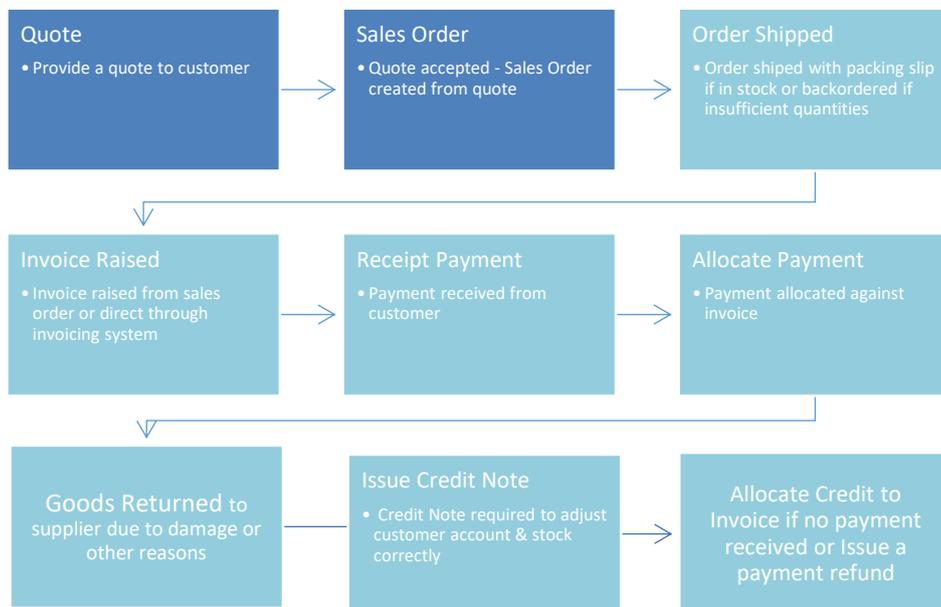
After completing this lesson you will be able to:

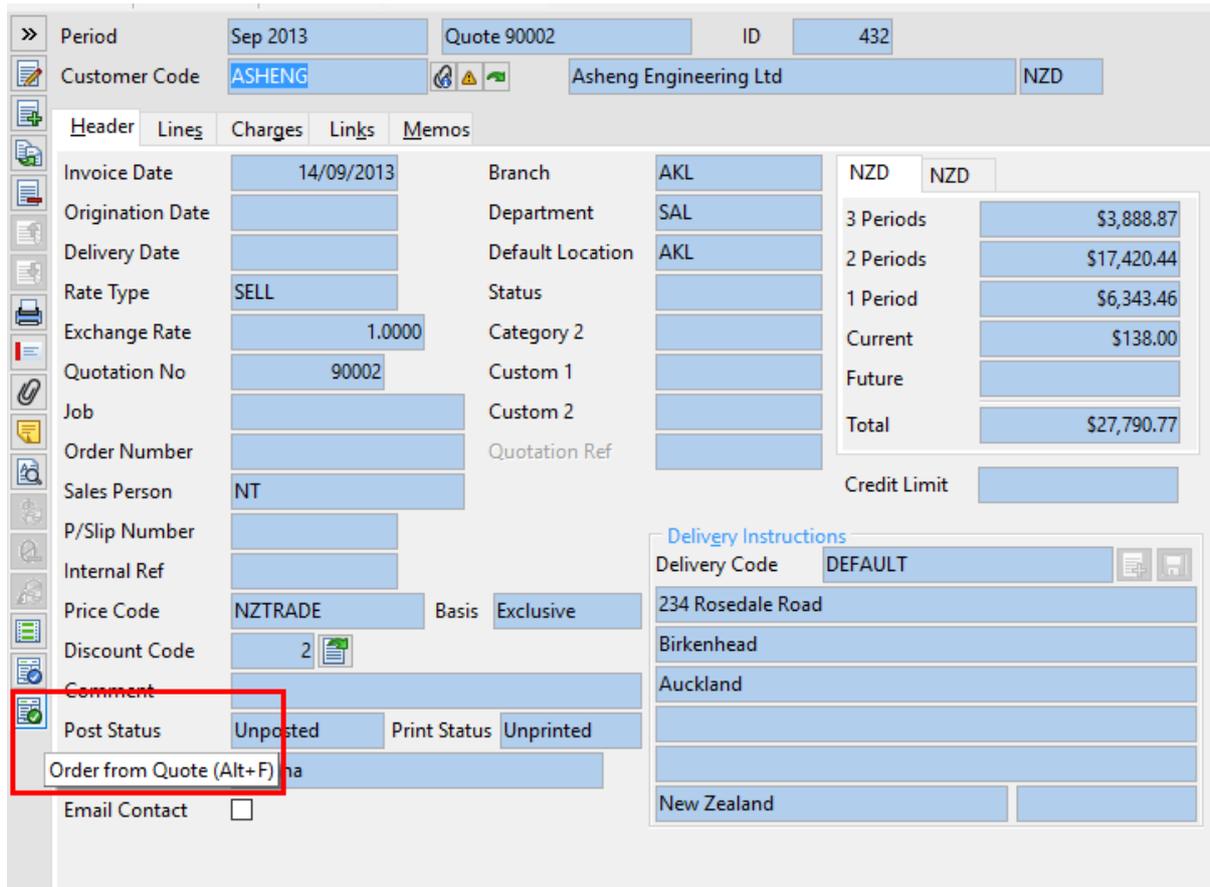- Convert a Quote to an Order

Contents

Process flow

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

┌─────────────────────┐     ┌─────────────────────┐     ┌─────────────────────┐
│ Invoice Raised      │     │ Receipt Payment     │     │ Allocate Payment    │
│                     │ →   │                     │ →   │                     │
│ • Invoice raised    │     │ • Payment received  │     │ • Payment allocated │
│   from sales order  │     │   from customer     │     │   against invoice   │
│   or direct through │     │                     │     │                     │
│   invoicing system  │     │                     │     │                     │
└─────────────────────┘     └─────────────────────┘     └─────────────────────┘

┌─────────────────────┐     ┌─────────────────────┐     ┌─────────────────────┐
│ Goods Returned to   │     │ Issue Credit Note   │     │ Allocate Credit to  │
│ supplier due to     │     │                     │     │ Invoice if no       │
│ damage or other     │     │ • Credit Note       │ →   │ payment received or │
│ reasons             │     │   required to adjust│     │ Issue a payment     │
│                     │     │   customer account  │     │ refund              │
│                     │     │   & stock correctly │     │                     │
└─────────────────────┘     └─────────────────────┘     └─────────────────────┘
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Converting Quotes to Orders

- 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 Order from Quote 🖼 (Alt + F)

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