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How Do You Create an Order from a Quote?

Tammy Mason - 2022-07-20 - in Quotes, Orders & Invoices

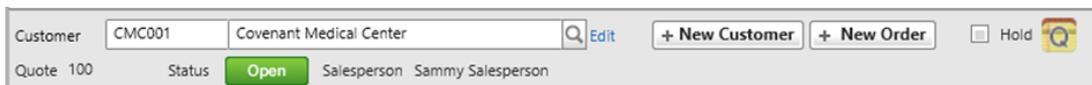
How Do You Create an Order from a Quote?

There are multiple ways to create an Order from a Quote.

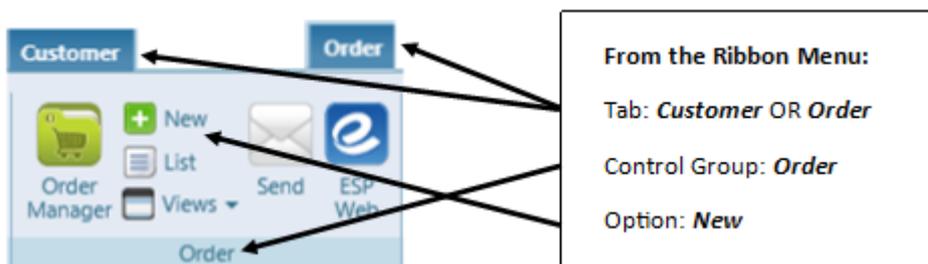
Why do I need an Order? You cannot apply costs to a Quote, nor can you create an Invoice from a Quote.

However, creating Orders from Quotes is EASY!

From the Customer tab, open a Quote from the List or Quote Manager in the Quote Group. Select New Order at the top of the Quote window. An Order will then be created, along with a New Order number, OR enter your own order number, depending on your setup in Company preferences. (Hint! Be certain a customer has been assigned BEFORE selecting New Order.)



OR



Create a new Order in the Order Manager or click Order New on the menu, select the Quote by either entering the Quote number or click the search tool to locate the Quote.



Add your customer if you have not already. Make the necessary additions and edits to complete the Order, then save.

Create a Quote from an Order?

On a saved order you can use the +New Quote button to turn the existing order into a quote.



Open the Order you wish to turn into a new Quote. Click the New Quote button and make any necessary changes. Save the Quote and print it or send it via email to the customer/vendor.