

Quotes

Change Quotes into Orders and Orders into Quotes using the Customer History Window

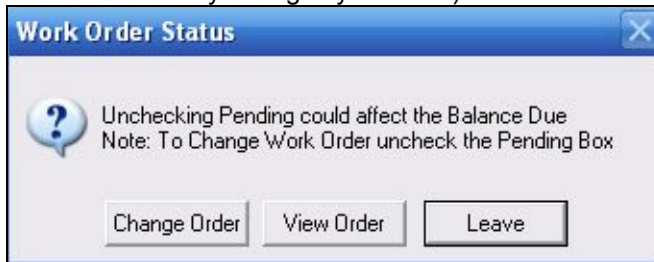
1. Click the Customer History icon button along the tool bar (Basic and Full versions can also access this through the Pending List window).



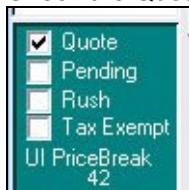
2. Locate the Work Order for your customer.

Q	Number	E	Completed	Pickup	Due Date	Image Desc
	1,000		Yes	No	4/11/2008	Picture Of Dog
	1,001		Yes	No	4/11/2008	Picture Of Kids A

3. Double click on the row which lists the specific work order you want to edit.
4. Click the Change Order button (clicking View Order will allow you to look at the order but will NOT save any changes you make).



5. Check the Quote check box in the bottom left of the work order screen.



6. Click Save Changes button at bottom right.
7. Now you can see in the Customer History window the work order has a "Q" in the first column in the row indicating it is a Quote.

Q	Number	E	Comple
	1,000		Yes
Q	1,001		No

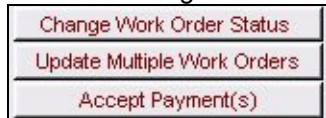
8. Note: To turn a quote into a work order, follow the above steps but rather than check the checkbox, uncheck the checkbox and click Save Changes.
9. Full and Basic Versions can also change the status of an order from the Pending List window or using the Change Work Order Status button at the bottom left.



Change a Quote status using the “Change Work Order Status” button in Custom History Window

(Basic & Full Versions only)

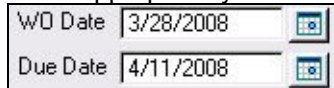
1. Highlight the order you want to change.
2. Note: you only have to Single click, double clicking will take you into the order entry window itself.
3. Click the Change Work Order Status button at the bottom left.



4. In the Change Work Order Status window which opens, you have a number of status options.
5. For Quotes, check or uncheck the Quote checkbox.



6. Use the Work Order Date and Due Date fields in the top right of the window to adjust dates appropriately.

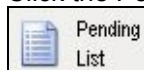


7. Click Save Changes.
8. The status is now changed and can be viewed in the Customer History window.

Change Quote into a Work Order using the Pending List

(Basic & Full Versions only)

1. Click the Pending List button along the tool bar.



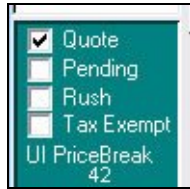
2. In the Browse Active Orders window which appears, click the Browse Quotes button at the top left of the window.



3. Here is a list of all the orders marked as Quotes.
4. Highlight the order you want to change.
5. Note: you only have to Single click, double clicking will take you into the order entry window itself.

M	Due Date	First name	Last name	Corporate Name	SI	WO No.	Image
▶	4/11/08	John	Doe	Nutech		1,001	Picture C

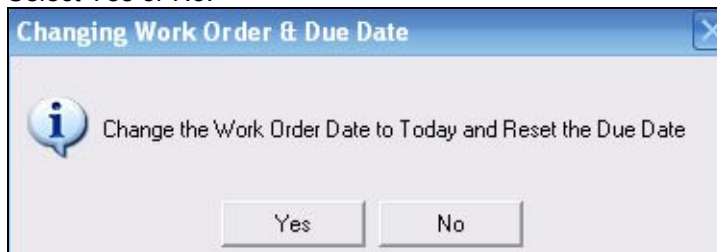
- Turn the Quote into an order using the Quote checkbox in the bottom left of the window or use the Change Work Order Status button.



- If using the Change Work Order Status Button, uncheck the Quote checkbox.



- Click Save Changes.
- You will be prompted with a message box asking if you want to update the Work Order date to Today and Reset the Due Date. (This will prompt you only in the Pending List Window since most Status changes occur here).
- Select Yes or No.

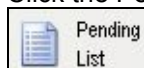


- Now your Quote which was the Browse Quotes section, will now be listed in the Browse Open Orders section (click Browse Open Orders button and the order will be listed).

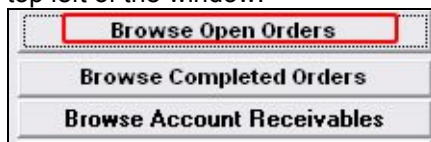
Change a Work Order into a Quote using the Pending List window

(Basic & Full Versions only)

- Click the Pending List button along the tool bar.



- In the Browse Active Orders window which appears click the Open Orders button at the top left of the window.



- Here is a list of all the orders marked as Open Orders.
- Highlight the order you want to change.

M	Due Date	First name	Last name	Corporate Name	SI	WO No.	Image
▶	4/11/08	John	Doe	Nutech		1,001	Picture C

- Note: you only have to Single click, double clicking will take you into the order entry window itself.
- Turn the Order into a Quote using the Quote checkbox in the bottom left of the window or use the Change Work Order Status button.

- If using the Change Work Order Status Button, check the Quote checkbox in the window which appears.

- Click Save Changes.
- Now your Order which was in the Open Orders section, will now be listed in the Quotes section (click Browse Quotes button and the order will be listed).

Print a Quote after it is Saved

- Open the Customer History window.
- Locate the order for your customer.
- Click the "Print Action List" drop down at the bottom right of the window.
- Select the type of Invoice you want to print.

- The Invoice will be printed as a "Quote" with the text "Quote" in the upper right corner.
- Note: If you have the program set to prompt you to print after saving an order, the "Invoice" prompt will print out the Quote with "Quote" in the upper right corner.