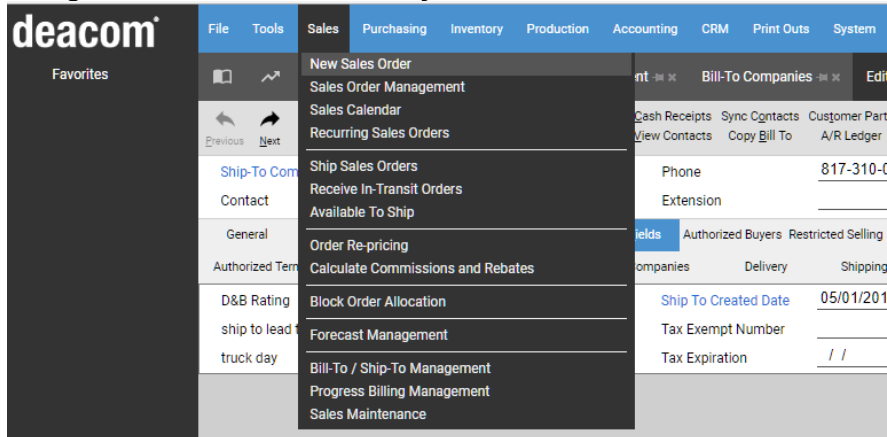


PURPOSE:

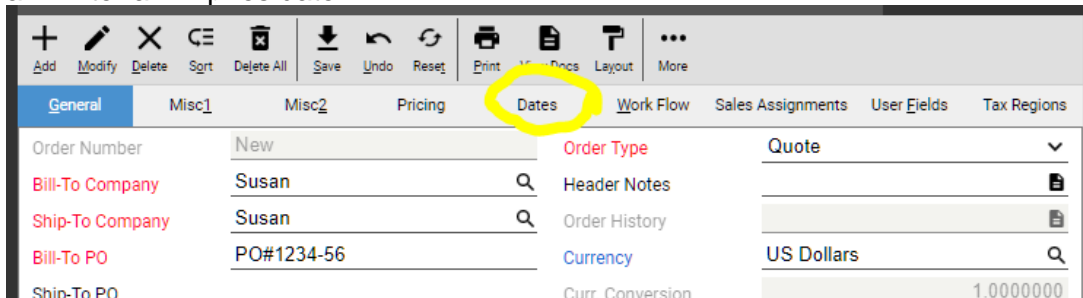
Orders that have not been approved by the customer can be marked as Quotes. Quotes cannot be shipped and are not subject to credit checking. Once the customer has accepted the order, users with access to Quotes can change the Order type to Sales Order.

PROCESS STEPS:

1. Navigate to **Sales > Order Entry**



2. On the General tab:
 - a. Select appropriate Bill-To and Ship-To Companies by clicking on the magnifying glass.
Note: The default Ship-To Company and other header fields will be auto-populated by selecting a Bill-To Company, or over-riden by the user.
 - b. Change the order type to **"Quote"**
Note: Do Not Use "VERBAL..." or generic terms in PO fields. Use Full Names if no specific Purchase Order Number has been provided.
Note: Header Notes are a memo field used to store notes regarding the **order** and are printed on all sales documents.
3. On the Misc1 tab, confirm the Freight and Ship Via fields are correct. If incorrect, change by clicking on the magnifying glass and selecting another option.
4. On the Dates Tab,
 - a. Enter an Expires date



5. Click the Add button to begin adding parts to the sales order. The 'Edit Sales Order Line' window will open.
 - a. In the Cust. Part Number box, click on the magnifying glass to search for the part.
 - b. Use the Part Number field if the desired part is not listed under Cust. Part Number.
Note: If you do not know the product number, Click Contains button and type description in "Search all columns..." bar

Note: See SOP 114_ *Customer Part Cross Reference* to set pricing for specific products for the Bill-To Customer

or directly from the Edit Sales Order Line window:

- i. In the Part Number line, click on the magnifying glass to search for the part.
 - ii. Double-click the desired part to choose, it will close the “select a Part Number” window.
 - iii. Return to the Cust. Part Number selection by clicking on the magnifying glass, and press the Add New button.
 - iv. In the “Bill-To/Ship-To Part Information” window, complete:
 1. Use the search box in the Bill-To Company field to select the appropriate Customer
 2. If applicable, enter a Ship-To Company.
 3. Change Cust. Part Number to match the customer’s number (if applicable)
 4. Enter Sales Price by stock pricing unit (i.e., Gallons, Pounds, Each, Tubes, & Case)
 5. Confirm the Sales Unit is the “container unit”
 6. Click ‘Save’ and close
 7. Double-click the newly added Cust.Part Number
 - c. Enter the Quantity for the part
 - d. Confirm the Unit Price shown is correct. If the Unit Price is incorrect, change to the correct price.
 - e. Click Next to add additional parts.
- Note:** Freight Outbound Sales Charge/Freight Outbound Oklahoma Sale or Fuel Surcharge/Fuel Surcharge Oklahoma if applicable
- f. Click Save and exit the ‘Edit Sales Order Line’ window.
6. Return to the General tab
 7. Click Save – this will generate an Order number in the Order Number field

Changing the quote to a sales order:

1. Navigate to **Sales > Sales Order Management**
2. Change the Order Type to “Quote”
3. Enter any other desired information in the filters
4. Click View
5. Highlight (single-click) the desired Quote
6. Click Modify button
7. Change Order Type to “Sales Order”
 - a. Enter the Customer Purchase Order Number into the Bill-To PO field, and Ship-To PO if that information is provided
 - b. **Note:** You can change quantities if desired by: highlight (single-click) the desired Sales Order Entry line and Click Modify button.
8. On the Misc1 tab, confirm the Freight and Ship Via fields are correct. If incorrect, change by clicking on the magnifying glass and selecting another option.
9. Click the Dates tab and fill in the applicable date fields:
 - a. Enter the **Wanted** Date
 - b. The Due to ship date will calculate based on the delivery lead time.

Note: Due to ship is the date used to drive demand in MRP and must be filled in for demand to flow properly.
10. Return to the General tab
11. Click Save – this will generate an Order number in the Order Number field



Entering a Quote -Existing Customer

SOP 108

Revision N, 01/11/2022

Approved by: Venezia Pena

REVISIONS

Rev	Date	Change
I/R	11/09/17	New
A	3/16/18	Apply steps from PE sessions
B	4/9/18	Add instruction Due to ship/Due to Dock dates
C	5/1/18	Change 7. to type "Sales Order"
D	5/7/18	Add pictures for clarity
E	5/10/18	Modify quote to sales order steps
F	8/3/18	Adding Cust. Part Number as 1 st step.
G	8/13/18	Added Tulco "additional parts" notes
H	8/30/18	Note for no more "verbal..." PO#'s
I	9/4/18	Add Cust. Part Cross Reference/Override Pricing steps
J	12/18/18	Change CPXR steps
K	3/14/19	Change Fuel/Freight name changes
L	4/26/19	Change notes for deposit = positive/credit = negative
M	10/30/20	Change to v16 Menu names
N	1/11/22	Remove Deposits/Credits language