SALES QUOTES

KEY POINTS:

- Sales Quotes are created under 'Sales' > 'Sales Quote' of the new document page.
- Quotes can be used to make jobs.

TERMS

1. Sales Quote – A document outlining a proposed job.

CREATE A NEW QUOTE

Click the **blank page** in the top left corner of FM3, select '**Sales**' and '**Sales Quote**', to create a new Sales Quote.
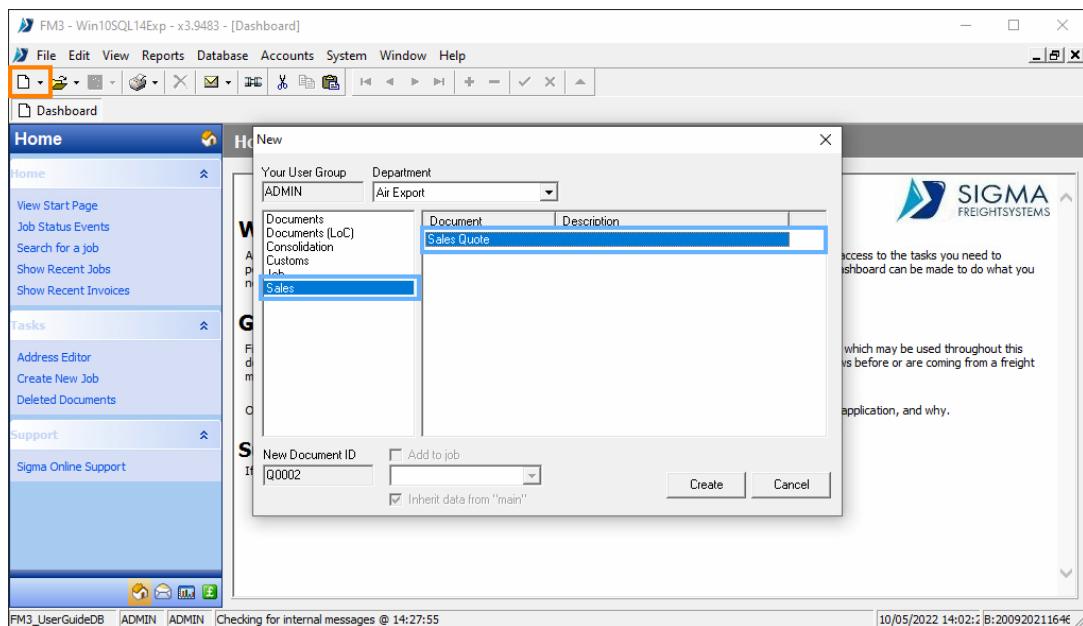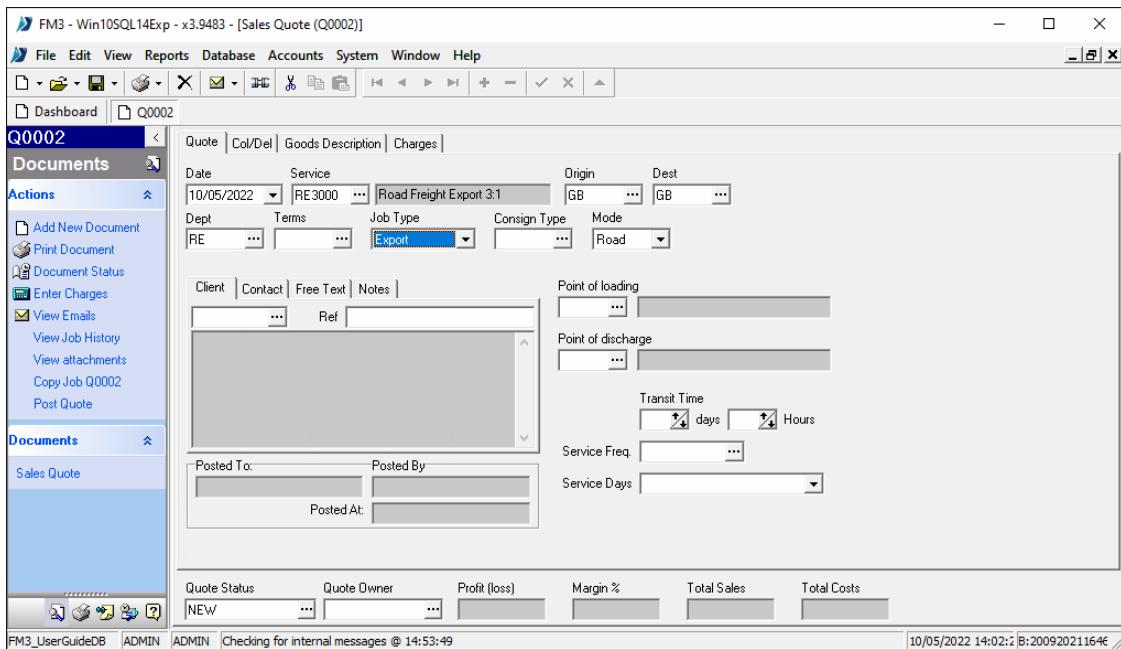
This is an empty Quote.

MENU

The menu in Sales Quotes is much like that in jobs, with Document Status and Charges, however there is a 'Post Quote' option, which allows quotes to be upgraded to jobs.
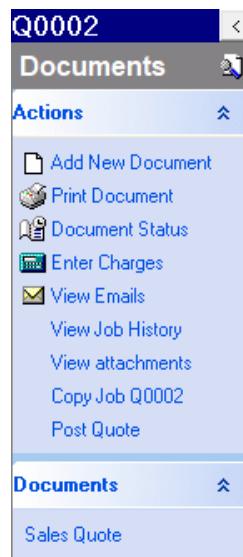
After clicking the '**Post Quote**' button, this **pop-up** will appear and provide information regarding the move over to a job. This includes the **Quote reference** and the **proposed new Job ref**.
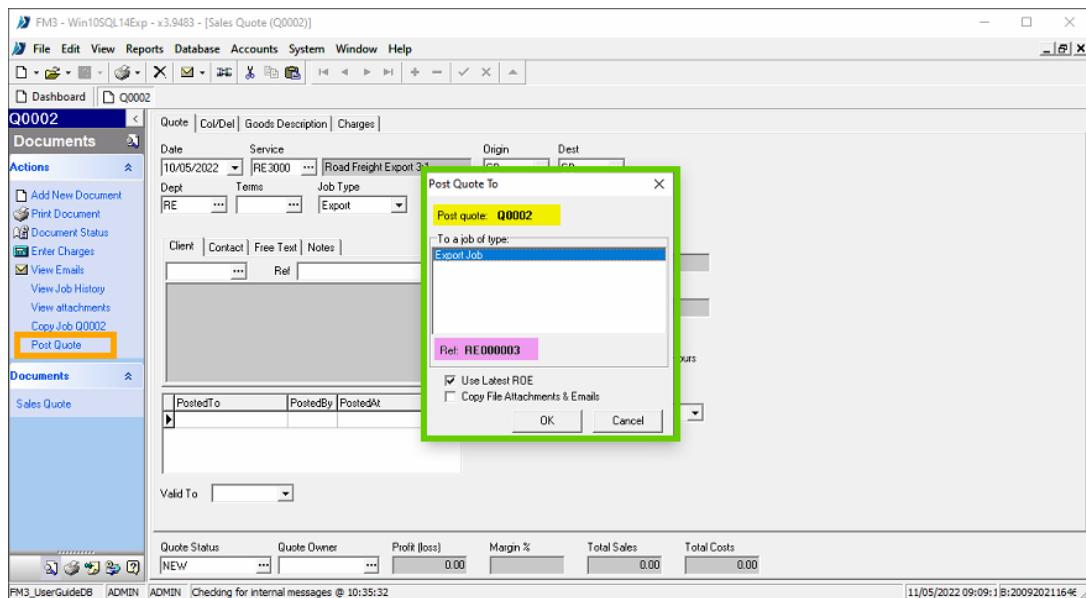
Click 'OK' on this screen and 'Yes' to the following pop-up to confirm the new job creation. The details from this quote will pull through and populate this job.