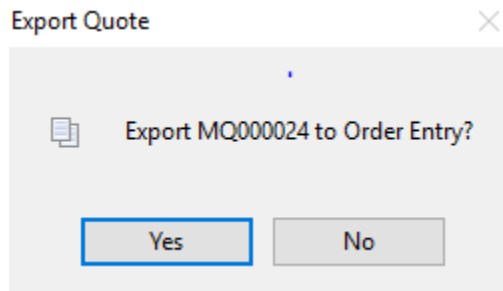


How To: Convert Quote to Customer Order & Create Purchase Order

Order Entry Main Menu>File>Quote

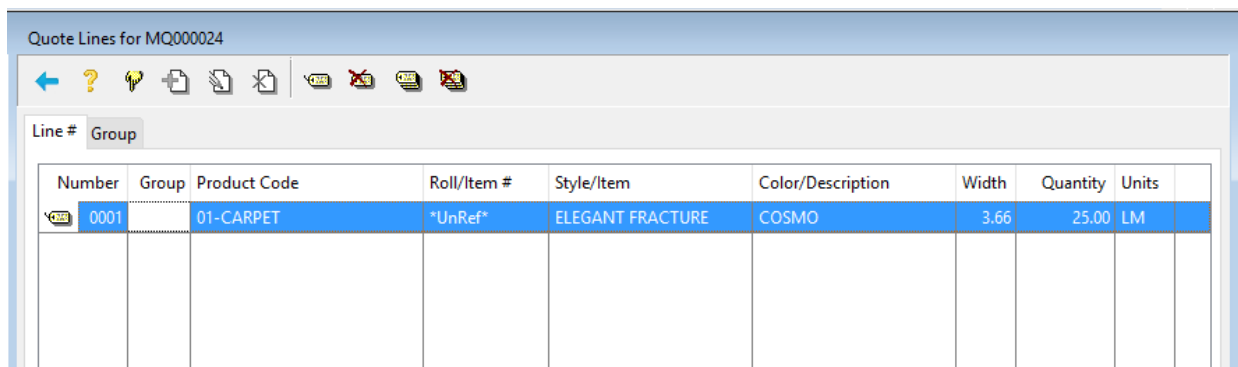
Using Smart Search find quote to convert, make sure the quote is highlighted

Select from Tool Bar  (Export to Order Entry)

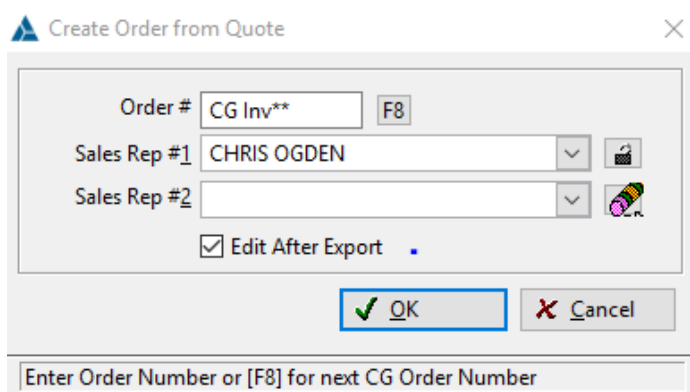


Select YES

This will show all lines on quote to export, use the selection finger



Line #	Group	Product Code	Roll/Item #	Style/Item	Color/Description	Width	Quantity	Units
0001		01-CARPET	*UnRef*	ELEGANT FRACTURE	COSMO	3.66	25.00	LM



Create Order from Quote

Order # F8

Sales Rep #1

Sales Rep #2

Edit After Export

OK Cancel

Enter Order Number or [F8] for next CG Order Number

Select edit after export, Select OK

This will open the converted quote in customer orders, giving it a new number


(Everything to do with this contract is identified by the this number, purchase order, pick ticket, work order, invoice)

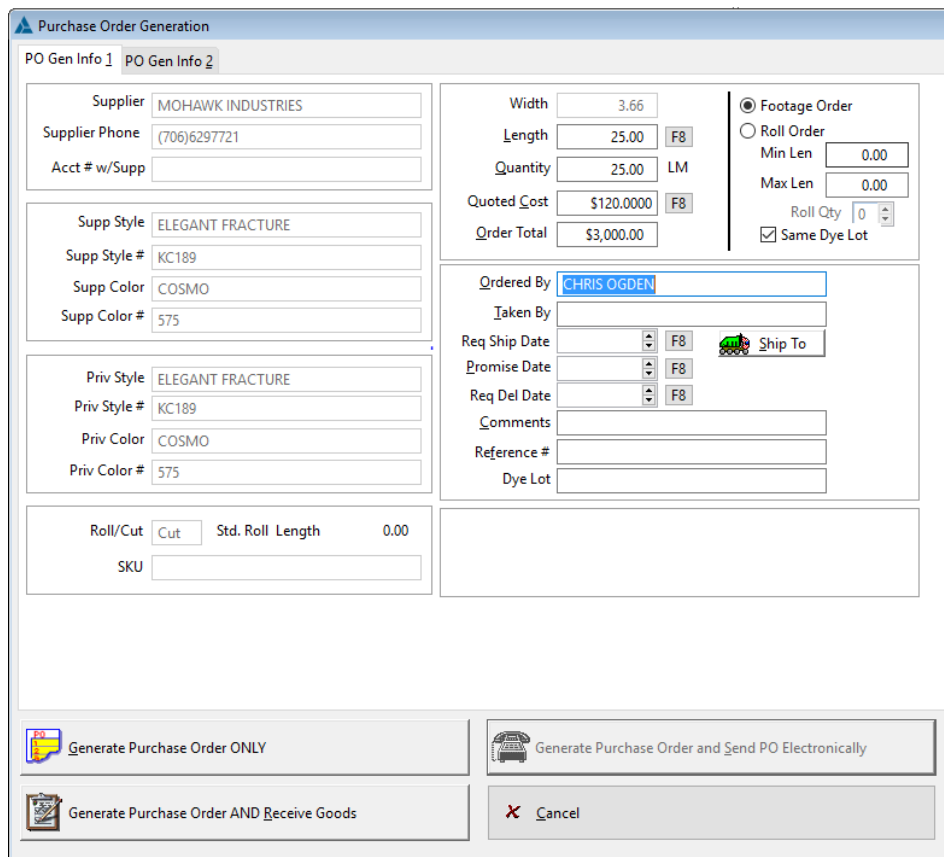
How To: Convert Quote to Customer Order & Create Purchase Order

How To: Create the Purchase Order

Highlight product line to order, the status column on product line should be Gen PO, if it is NONE adjust status to Gen PO. This will light up the truck icon.

Style / Item Name	Color / Description	Width	Length	Quantity	Units	Price	Total	Status
ELEGANT FRACTUR	COSMO	3.66	25.00	25.00	LM	216.00	5,400.00	Gen PO

Click on the truck PO icon  on tool bar (bottom left) Purchase Order Generation box will appear.



Purchase Order Generation

PO Gen Info 1 | PO Gen Info 2


Supplier: MOHAWK INDUSTRIES
Supplier Phone: (706)6297721
Acct # w/Supp:

Supp Style: ELEGANT FRACTURE
Supp Style #: KC189
Supp Color: COSMO
Supp Color #: 575





Priv Style: ELEGANT FRACTURE
Priv Style #: KC189
Priv Color: COSMO
Priv Color #: 575

Width: 3.66
Length: 25.00 F8
Quantity: 25.00 LM
Quoted Cost: \$120.0000 F8
Order Total: \$3,000.00

Footage Order
 Roll Order
Min Len: 0.00
Max Len: 0.00
Roll Qty: 0
 Same Dye Lot

Ordered By: CHRIS OGDEN
Taken By:
Req Ship Date: F8  Ship To
Promise Date: F8
Req Del Date: F8
Comments:
Reference #:
Dye Lot:

Roll/Cut: Cut Std. Roll Length: 0.00
SKU:

 Generate Purchase Order ONLY
 Generate Purchase Order and Send PO Electronically
 Generate Purchase Order AND Receive Goods
 Cancel

The information in this box is drawn from the product file.

Two fields need to be populated

1. Taken By – this is the way the order has been placed (email, online, fax)
2. Promise Date – The date you expect the order to be delivered to your warehouse

Then select Generate Purchase Order ONLY

Style / Item Name	Color / Description	Width	Length	Quantity	Units	Price	Total	Status
ELEGANT FRACTUR	COSMO	3.66	25.00	25.00	LM	216.00	5,400.00	On Order 29/09/17

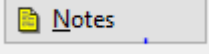
The line record status will now say On Order 29/09/17

How To: Convert Quote to Customer Order & Create Purchase Order

To add cuts to the purchase order and email to supplier select view PO icon beside the truck



, the purchase order will pop up then select the notes icon.



Purchase Order for Order MO000063, Line Number: 0001

Purchase Order

PO Line #	MO000063-0001	Width	3.66	<input type="radio"/> Footage Order
Order Date	27/09/17	Length	25.00 F8	<input type="radio"/> Roll Order
Store Code	"4"	Roll/Cut	Roll	Roll Min: 0.00
Product Code	01 F8 CARPET	Quoted Price	120.000 F8	Roll Max: 0.00
Manufacturer	MOHAWK INDUSTRIES	Amt Ordered	25.00 LM	Roll Qty: 0
Supplier	MOHAWK INDUSTRIES F8	Amt Received	0.00	<input type="checkbox"/> Same Dye Lot
Priv Label Co	MOHAWK INDUSTRIES	Ordered By	CHRIS OGDEN	
Private Style	ELEGANT FRACTURE	Taken By	EMAIL	
Private Color	COSMO	Req Ship Date		
Style	ELEGANT FRACTURE F8	Promise Date	29/09/17	
Color	COSMO	Reserve #		
Units	LM F8	Times Printed	0	
Roll #	MO0000630001 F8	Status	Open	
Style #	KC189	Total Value	3000.02	
Priv Style #	KC189	Sidemark	D'MUSS, JAKE	
Color #	575	Comments		
Priv Color #	575	Ref #		
Dye Lot		Sales 1	CHRIS OGDEN	
Supp Phone #	(706)6297721	Sales 2		
Supp Account #				

Notes Print PO Exit

Add cuts, make them bold and large print

Purchase Order Notes for PO: MO000061-0001

Arial 22 Western **B** *I* U

Cuts

2.50

3.50

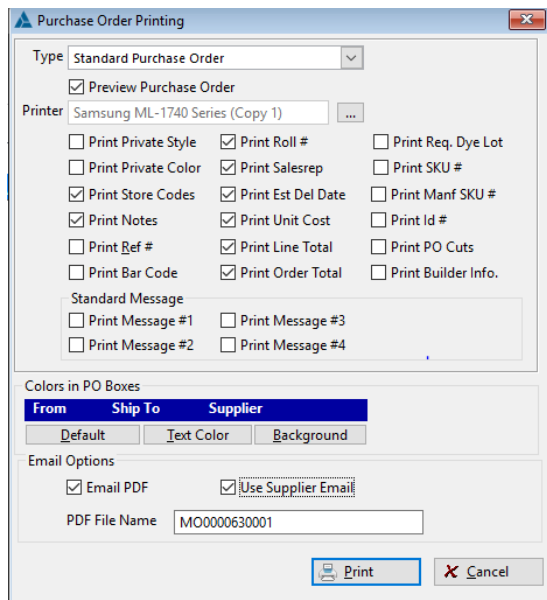
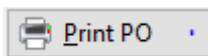
4.00

Recurring Note Date Stamp Print History Clear OK Cancel

Select OK

How To: Convert Quote to Customer Order & Create Purchase Order

To email the purchase order, select



Purchase Order Printing

Type: Standard Purchase Order

Preview Purchase Order

Printer: Samsung ML-1740 Series (Copy 1)

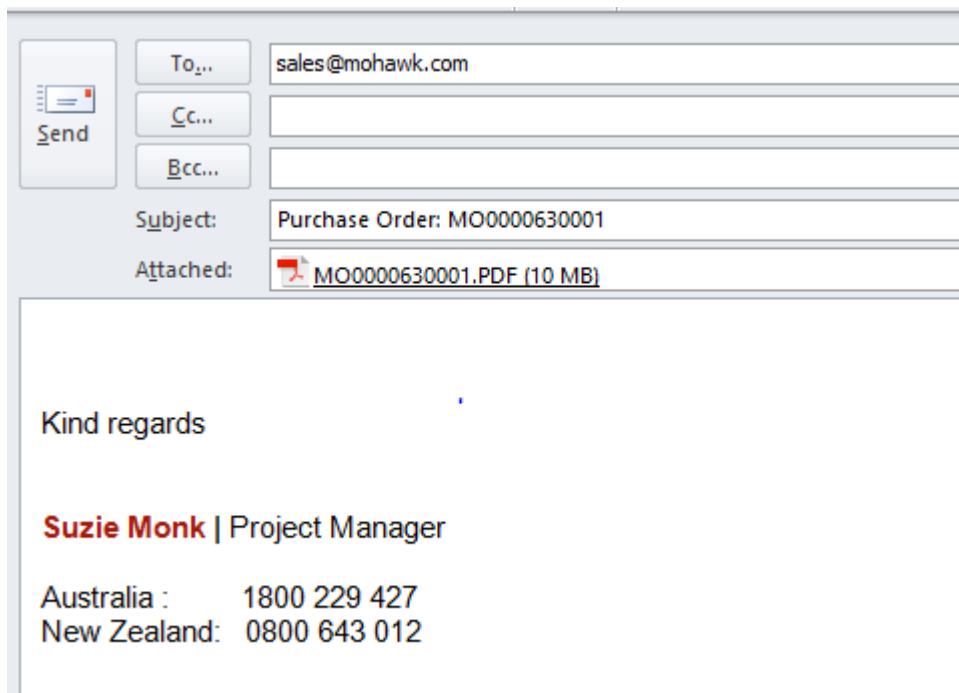
Print Private Style Print Roll # Print Req. Dye Lot
 Print Private Color Print Salesrep Print SKU #
 Print Store Codes Print Est Del Date Print Manf SKU #
 Print Notes Print Unit Cost Print Id #
 Print Ref # Print Line Total Print PO Cuts
 Print Bar Code Print Order Total Print Builder Info.

Standard Message
 Print Message #1 Print Message #3
 Print Message #2 Print Message #4

Colors in PO Boxes
From: Default | Ship To: Text Color | Supplier: Background

Email Options
 Email PDF Use Supplier Email
PDF File Name: MO0000630001

Then print, this will turn it into a PDF and send to outlook ready to send to the supplier




Send

To...: sales@mohawk.com

Cc...

Bcc...

Subject: Purchase Order: MO0000630001

Attached:  MO0000630001.PDF (10 MB)

Kind regards

Suzie Monk | Project Manager

Australia : 1800 229 427
New Zealand: 0800 643 012