

Ticket – Converting A Quote To A Workorder AV Ref # 580

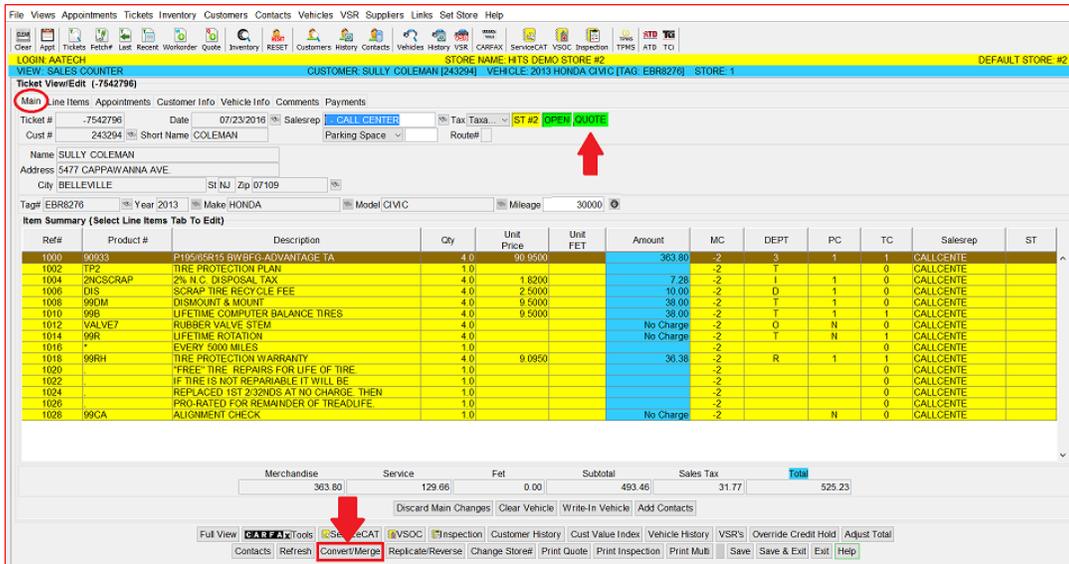
There is also a video showing how to perform this function:
Ticket – Converting A Quote To A Workorder (:27) – AV Ref# 313

About:

Creating a quote is a great way to give a potential customer specific and accurate parts & labor pricing. Once a customer agrees to a job, it is incredibly easy to convert their quote into a workorder.

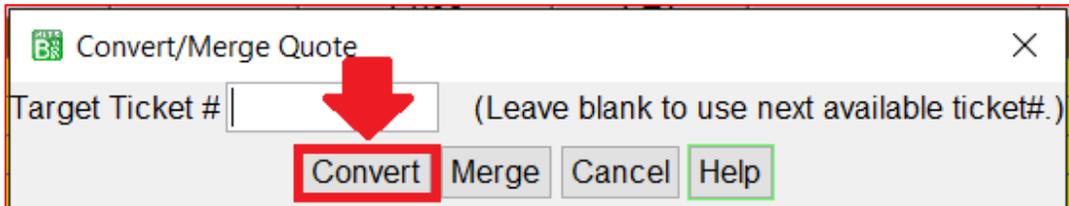
How:

1. From the **Main** tab of your customer's quote, click on the **Convert/Merge** button at the bottom of the screen:



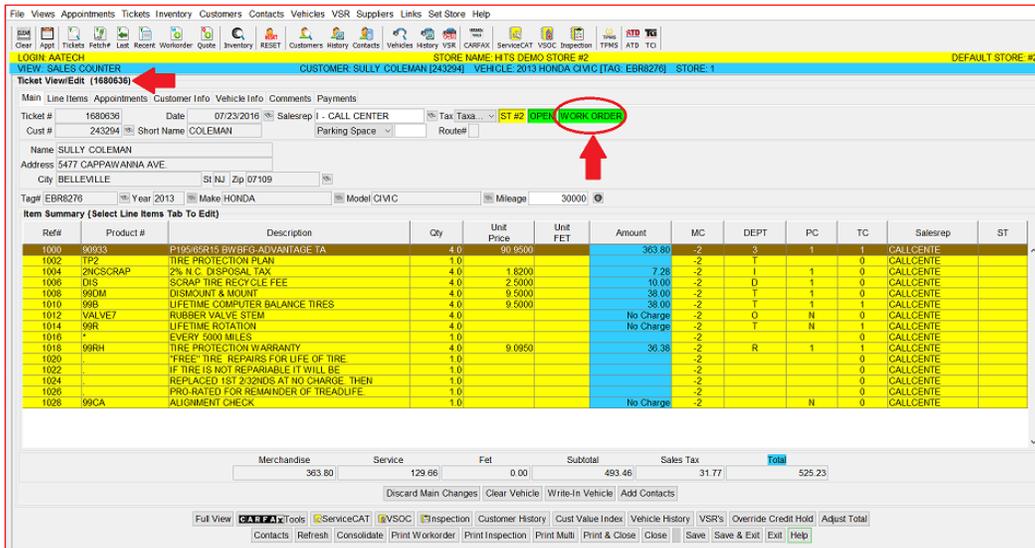
The screenshot shows the main interface of the software. At the top, there is a menu bar with options like File, Views, Appointments, Tickets, Inventory, Customers, Contacts, Vehicles, VSR, Suppliers, Links, Set Store, Help. Below the menu bar, there are several icons for various functions. The main area displays customer information for SULLY COLEMAN, including address and contact details. A table of items is shown with columns for Ref#, Product #, Description, Qty, Unit Price, Unit FET, Amount, MC, DEPT, PC, TC, Salesrep, and ST. At the bottom, there is a summary section with buttons for 'Full View', 'Convert/Merge', 'Replicate/Reverse', 'Change Store', 'Print Quote', 'Print Inspection', 'Print Mult', 'Save', 'Save & Exit', 'Exit', and 'Help'. A red arrow points to the 'Convert/Merge' button.

2. Leave the **Target Ticket #** blank and click on the **Convert** button:



The screenshot shows a dialog box titled 'Convert/Merge Quote'. It has a close button (X) in the top right corner. Below the title, there is a text input field labeled 'Target Ticket #' which is currently empty. To the right of the field, there is a note: '(Leave blank to use next available ticket#.)'. Below the input field, there are four buttons: 'Convert', 'Merge', 'Cancel', and 'Help'. A red arrow points to the 'Convert' button.

3. Your quote has now been converted to a workorder. You may edit as needed:



The screenshot shows the Andreoli Software interface. At the top, there is a menu bar with options like File, Views, Appointments, Tickets, Inventory, Customers, Contacts, Vehicles, VSR, Suppliers, Links, and Set Store. Below the menu bar is a toolbar with various icons. The main area displays a workorder for a customer named Sully Coleman. The workorder details include Ticket # 1680636, Date 07/23/2016, Salesrep 1 - CALL CENTER, and ST #2. The 'WORK ORDER' button is highlighted with a red circle, and a red arrow points to it from below. Another red arrow points to the 'NEW SALES COUNTER' button on the left. Below the workorder details is a table of items with columns for Ref#, Product #, Description, Qty, Unit Price, Unit FET, Amount, MC, DEPT, PC, TC, Salesrep, and ST. The table lists various services and parts, including tire protection, disposal tax, scrap tire recycle fee, and rubber valve stems. At the bottom of the table is a summary section with columns for Merchandise, Service, Fet, Subtotal, Sales Tax, and Total. The total amount is 525.23.

Option Settings:

**** Note –** Users must have password permission to create and edit invoices (P16). If you need to give a user permission to invoice, please contact your system administrator.