

Creating Quotes

Available in All Versions of Sage 50 Accounting

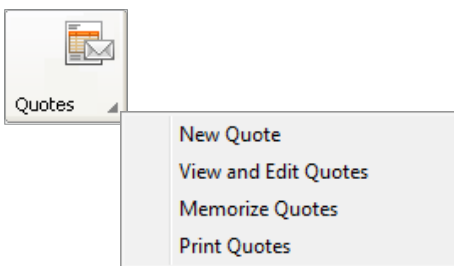
Quick Reference Guide

What is a Quote?

A quote is a **price estimate** for a product or service you provide. The estimate is usually requested by either a prospect or an existing customer. You can set a Good Thru date to show when the price quote expires.

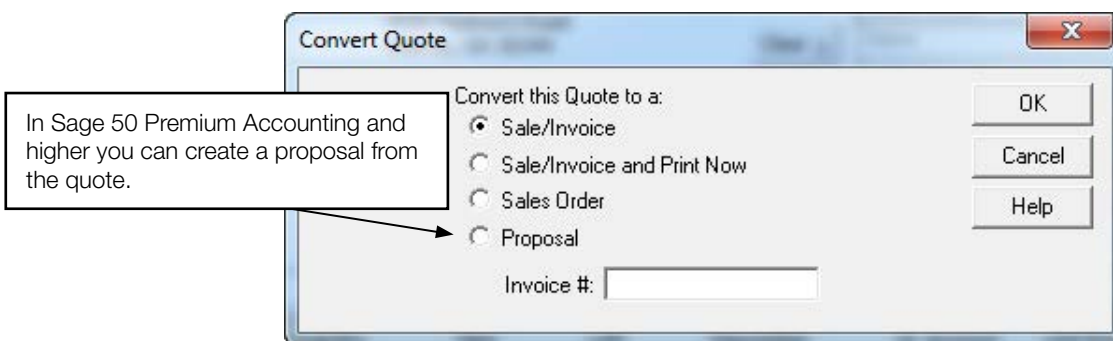
Where do I enter a Quote?

Customers & Sales Navigation Center > Quotes and Proposals > New Quote.



After entering the quote, what's the next step?

Once the customer decides to order or buy the products or services, simply open the quote and click **Convert**. You can create a sales order or sales invoice from this quote.



Did you know?

- You can quickly access the Quotes list for a selected customer from the Customer Management tab in the Customer & Sales Navigation Center.
- If you plan to create the same quote in the future, you can save it as a **memorized transaction**.
- When you print or save a quote, you are not actually updating accounting information. When you convert the quote to a sales invoice, the sale is recorded and your accounting information is updated.

For more info, visit: Sage.com
or contact us at 866-996-7243