



TTS Quote to TOE Order

1) From the 'Customer Quotation Review' screen select "Create TOE Order"

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CUSTOMER QUOTATION REVIEW

Quotation Options
Current Quote ▾
BOM Import Quote
Add Additional Vendor
Add to Calendar
Add Customer
Assign Action Item
Back to Report
Change Q-Name
Create MS Excel
Create TOE Order
Create PDF
 Total Only
Delete Quote
Factory Quote
Internal Notes
Refresh
Save
Send Only
 Macro Free Excel
Send/Save
 Macro Free Excel
Send to Vendor

Customer A Distributor ▾
12 Front St
Boston, MA 02134
RFQ Name Arlington Sample (Q-17538)
Contractor Cianbro ▾
Vendor Arlington ▾
Product Group ▾
Contact Nicholas McCull Use Contact File ([View Contact](#))
Quote Date 6/27/2020

Project
Quote Status Buy
Quote Type Project Stock
Ship To

Quote Notes

Re-Usable BOM ▾
Change Price From: 1 ▾ To: 1 ▾ Multiplier: 1.00

Pricing AFCCable ▾ Product Info Product Mix TOE Stock Lighting Template

Ln#	Description	Product #	Quantity	Unit Price	Price Per	Extension	Total	Remarks	Weight	Total Weight Per	Weight Ext
1	Rep Product Description	1274A	200	\$125.00	C	\$250.00	\$400.00	Line item remark	0.0		0
2	New Product Not Stocked	38AST	300	\$50.00	C	\$150.00			0.0		0
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											

Quotation Team
Traci (i)
matthew (o)

2) Enter all the appropriate data.

a. * denotes required fields

b. Edit product data if need be

i. If product needs to be created in TOE click 'Create Product in TOE'

ii. If you do not want to create a new product you can select "Create Manual Product"

c. **Each line must read 'Product Found in TOE' or 'Manual Product in TOE'**

3) Then select "Create Order in TOE"

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Create Order in TOE for Quote: Arlington Sample (Q-17538)

Select Vendor* Contact Select Customer*

Select Freight Term* Select Ship To*

Select Warehouse* Select Shipper* Order Memo

PO Number*

Allow Duplicate PO #

Product Data					
Quantity	Product #	Description	Price	Remarks	Product in TOE
200	1274A	Rep Product Description	\$125.00	Line item remark	<input type="button" value="Create Product in TOE"/> <input type="button" value="Create Manual Product"/>
300	38AST	New Product Not Stocked	\$50.00		Product Found in TOE

Trailing Notes



- 4) A Message Box will appear showing the Order# that was create.
- You will then be able to review/release it in TOE
 - Click “Close” and you will be brought back to the quotation where you can update the status

