

TTS Quote to TOE Order

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

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Quotation Options	Customer	A Distributor V		Pro	ject						
Current Quote 🗸		12 Front St Boston MA 02134		Qu	ote Status Buy						
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Add Additional Vendor	Vendor	Arlington	~	511	p 10						
Add to Calendar	Product Groun	, ▼									
Add Customer	Contact	Nicholas McCull	Use Contact File (New Contact)							
Assign Action Itom	Quote Data	6/27/2020	Cose contact The (Qu	ote Notes						
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Back to Report											
Back to Report	<u>Re-Usable BON</u>	<u>и</u>	~								
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2) Enter all the appropriate data.

- a. * donates 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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Home Mar	nage Customer Quotes Quotat	ion Reports Price Sheets D	ata Files CRM S	Sales Company Da	ta Reach Out	Projects TTS Cloud TOE						
Show Quick	Launch Create Customer Quo	te Search Customer Quotes	Quotes Sent to Ven	dor Import Vendo	r Quotes							
Create Order in TOE for Quote: Arlington Sample (Q-17538)												
			Contact	Nicholas McCul								
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Product Data												
Quantity	Product #	Description	Price	Re	marks	Product in TOE						
200	1274A	Rep Product Description	\$12	5.00 L	ine item remark	Create Product in TOE Create Manual Product						
300	38AST	New Product Not Stocked	\$5	0.00		Product Found in TOE						

Trailing Notes

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

