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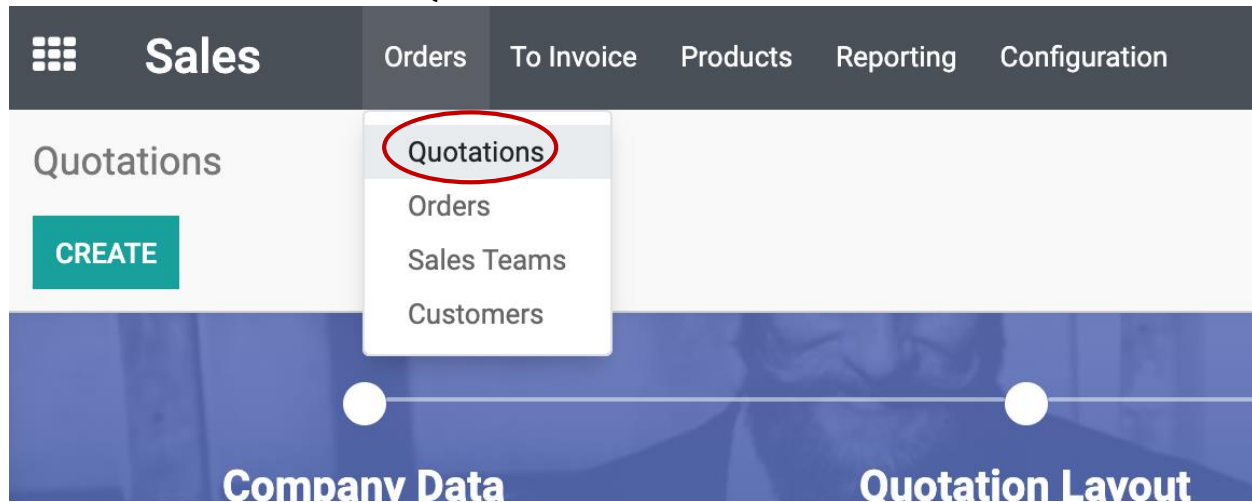
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Sales Module

The sales module allows you to generate quotation and sales order, along with the relevant settings & configurations related to quotations & sales orders, such as payment terms, products, discounts, templates etc.

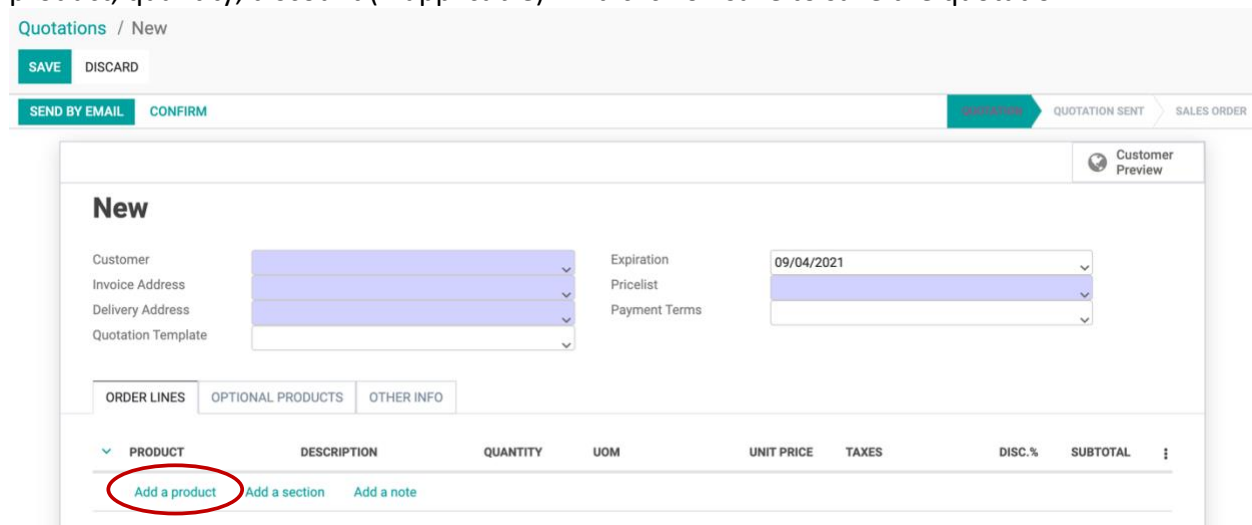
i. Create a quotation

Go to **Sales** module → **Orders** → **Quotations**.

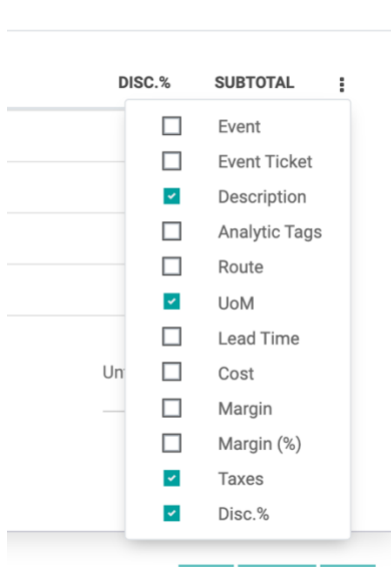


Click on the **Create** button to create a new quotation. In the quotation form insert the details for the quotation, when selecting a customer; invoice address, delivery address, pricelist will be auto selected based on the customer settings. Select quotation template (if any), expiration date of the quotation, and payment terms.

After inserting the basic information for the quotation, click on **add a product** to add the product, quantity, discount (if applicable). And click on save to save the quotation.

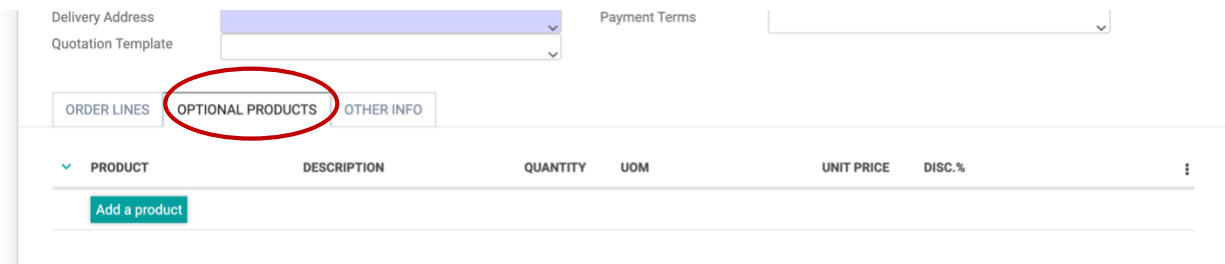


Click on the 3 dots next to subtotal to add any other field in the quotation. Simply check on the boxes to add a new field.



Optional Products:

This is an area where you can add 'additional' or 'accessory' as options to your customer. When you print out or download the quotation or sales order, optional products and its price will not be included in your quotation or sales order total amount, since it is 'only optional'.



Include other information for sales, delivery and invoicing settings. If you have already set these configurations when setting up the customer under the Contact modules, these will already exist and you do not have to set it again.

ORDER LINES
OPTIONAL PRODUCTS
OTHER INFO

Sales

Salesperson:

Sales Team:

Company:

Online Signature:

Online Payment:

Customer Reference:

Tags:

Invoicing

Fiscal Position:

Analytic Account:

Delivery

Shipping Policy:

Delivery Date: Expected:

ii. Set up quotation templates

By creating custom quotation templates, you will save a lot of time instead of inserting the products and settings every time. Indeed, with the use of templates, you will be able to send complete quotations at a fast pace and still edit the quotation after pulling it up. To enable this feature, go to **Sales → Configuration → Settings** and activate **Quotation Templates**.

Quotation Templates
Create standardized offers with default products

Default Template: ▼

[→ Quotation Templates](#)

Create a new template or edit an existing one by entering **Quotation Templates**. Once named, you will be able to select products and quantities as well as the expiration time of the quotation.

Customize Debrand / Quotation Templates / New

SAVE DISCARD

Quotation Template

Quotation expires after: days Company:

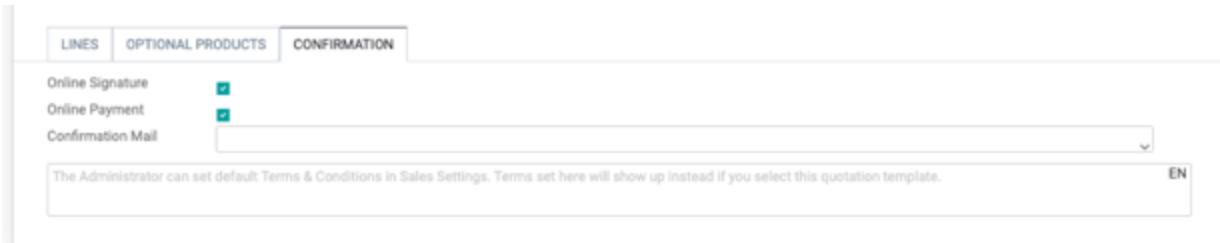
LINES
OPTIONAL PRODUCTS
CONFIRMATION

PRODUCT	DESCRIPTION	QUANTITY	UNIT OF MEASURE
Add a product Add a section Add a note			

The Administrator can set default Terms & Conditions in Sales Settings. Terms set here will show up instead if you select this quotation template. EN

Templates facilitate the confirmation process by allowing customers to sign electronically or to pay online. You can activate these two options directly in the quotation template itself.

Also there is a free text field, for you to set default Terms & Conditions. The pre-defined T&C will also show up when selecting the quotation template.



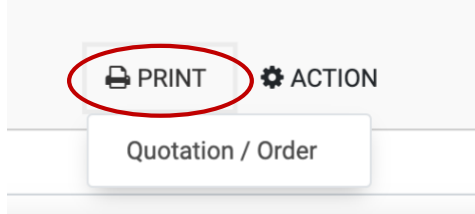
iii. Default quotation validity

To enable this feature, go to **Sales → Configuration → Settings** and activate **Default quotation validity**. And set up the default limit of days.



iv. How to download a sales quotation

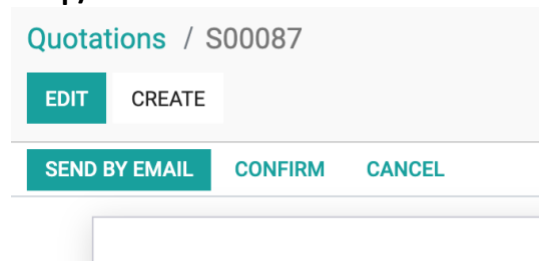
To download a quotation click on the **Print** icon, click on Quotation/Order, and the quotation in PDF format will be opened in a new tab where you can download it.



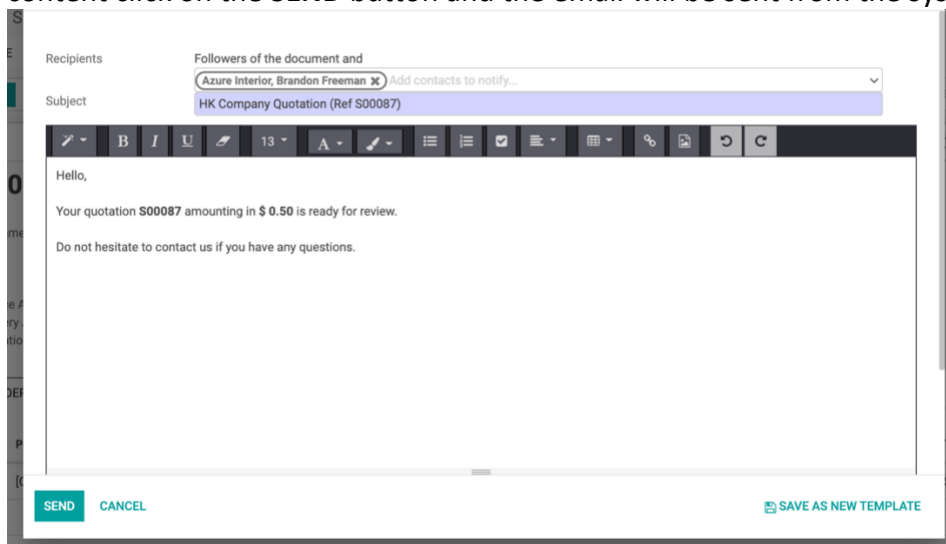
v. How to send a quotation by email through the system

After saving the quotation, you can either download it and attach/send it as you like, **OR** you can click on the **Send by email** button to send the quotation through the system. *(Please note that will **only** be available once you have set up the smtp of your company email and link it to

our system. Please kindly refer to **System User Guide – General settings – setting up your smtp/email**.

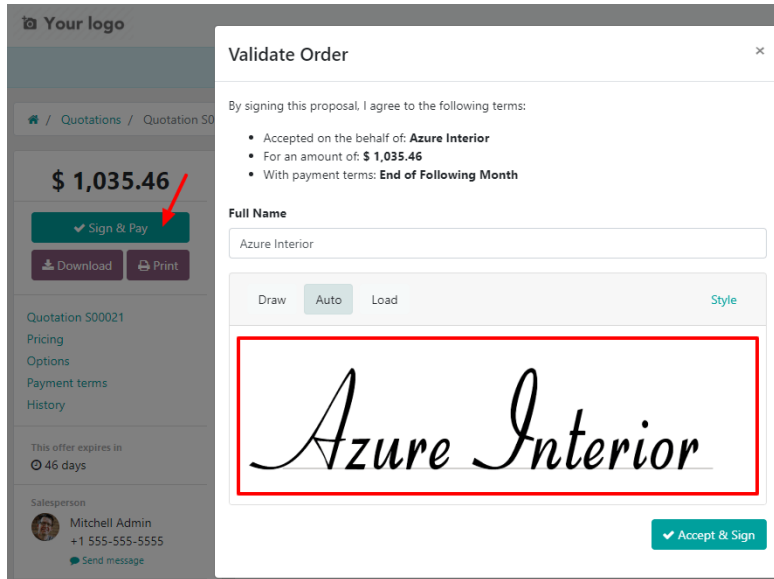


The quotation will be attached in an email based on a predefined email template, as well as the email address for the 'customer' which you have selected. At this step you can add other recipients (if necessary), adjust the email subject, review the email content. After revising the content click on the **SEND** button and the email will be sent from the system.



vi. Confirm an order with a signature

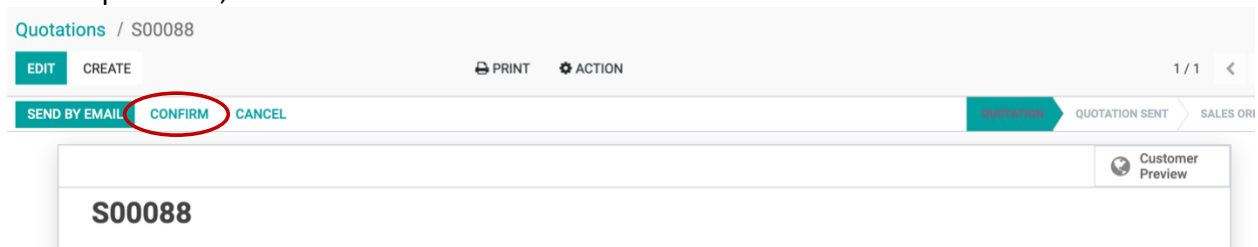
When you send quotations to clients, they can instantly accept and sign it online. When they click on **Sign & Pay**, they have the choice to draw their own signature, automatically fill in the field with an automated signature or load a file from their computer. Here below, it is an example of an automated signature:



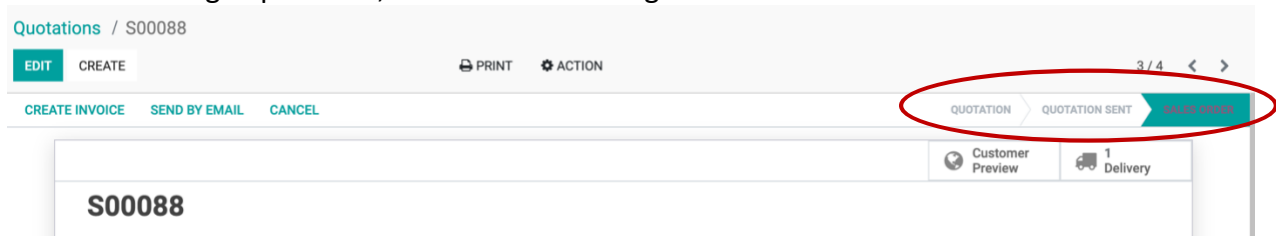
Once signed, you will have the possibility to choose your payment methods. Then, when the quotation will be paid and confirmed, a delivery order will be created automatically.

vii. How to create a sales order

Sales orders will automatically appear once you have confirmed a quotation in the system. Go to the quotation, click on **Confirm**.

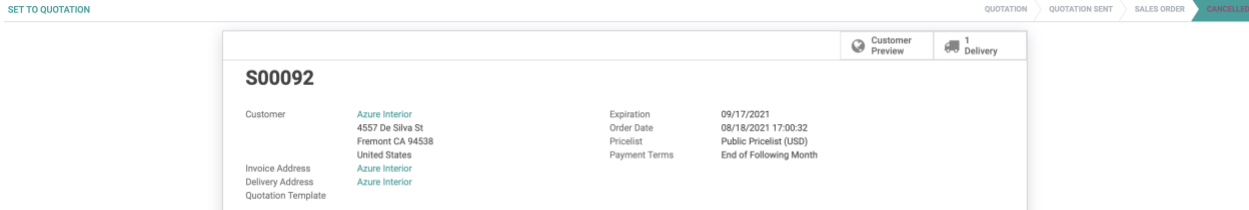


After confirming a quotation, the status will change from “Quotation” to “Sales Order”.



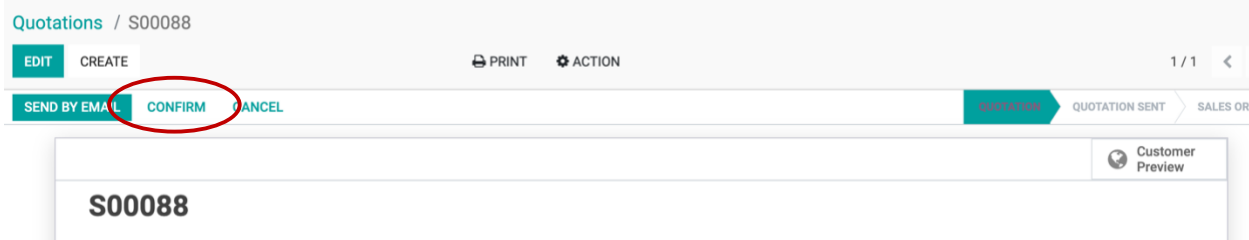
In some cases, if you pressed it by mistake or you need to make any amendments, you can press **Cancel**, to cancel the sales order, thereafter press **Set to quotation**. Then the order will now become a quotation again, and you may edit it before confirming it to become a sales order.



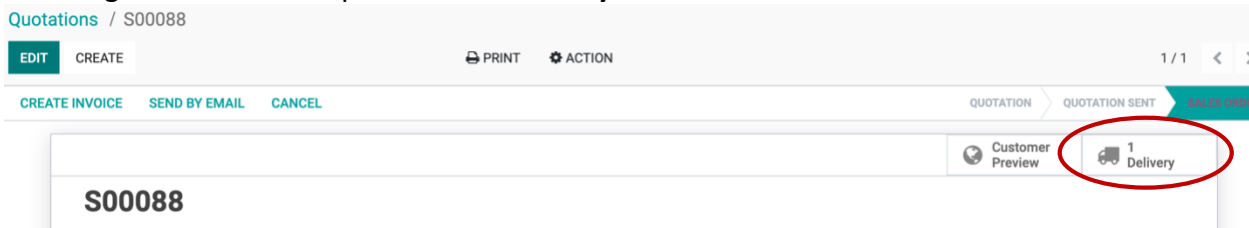


viii. How create a delivery note

Delivery notes will automatically appear once you have confirmed a quotation and it becomes a sales order in the system, as it means you have sold something, therefore the sold items will need to be delivered (only applies for products that are selected as “storable” under product settings). Go to the quotation, click on **Confirm**.



After confirming a quotation, a delivery note will be automatically generated and will be shown in the right corner of the quotation as **Delivery**



Click on the Delivery button to view the delivery note. This will also appear under your “Inventory” Module, under “Delivery” – as it is an item which is pending to be delivered.

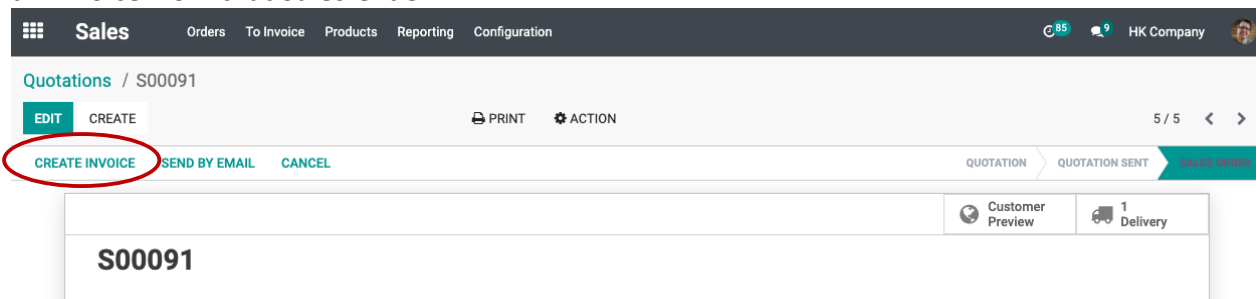
ix. How to create an invoice

After confirming a Sales Order, you may create an invoice directly from your sales order.

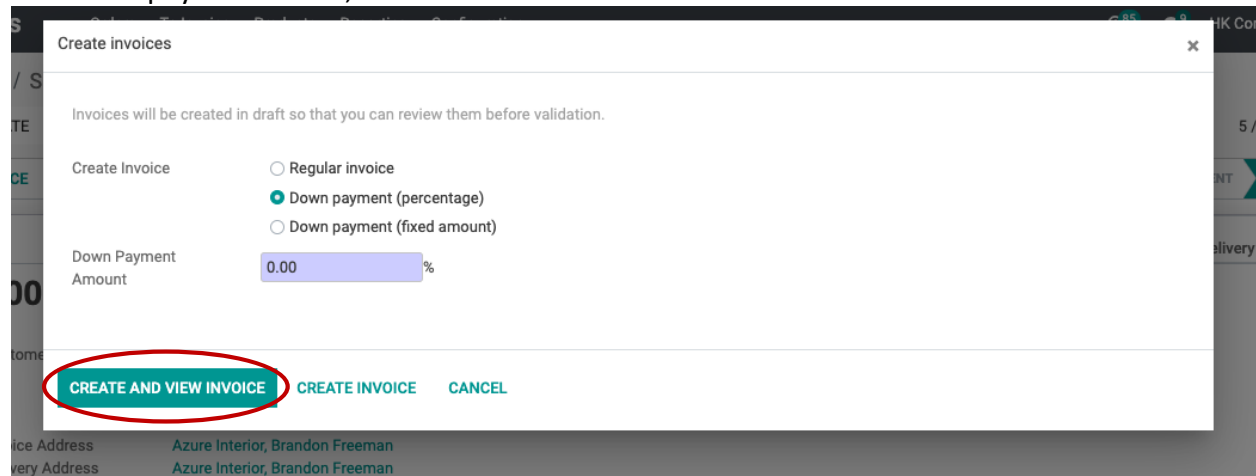
x. Generate an invoice from a quotation

Depending on your business and the application you use, there are different ways to automate the customer invoice creation in W+ ERP. Usually, draft invoices can be created by the system (with information coming from other documents like sales order or contracts) and the accountant just have to validate draft invoices and send the invoices in batch.

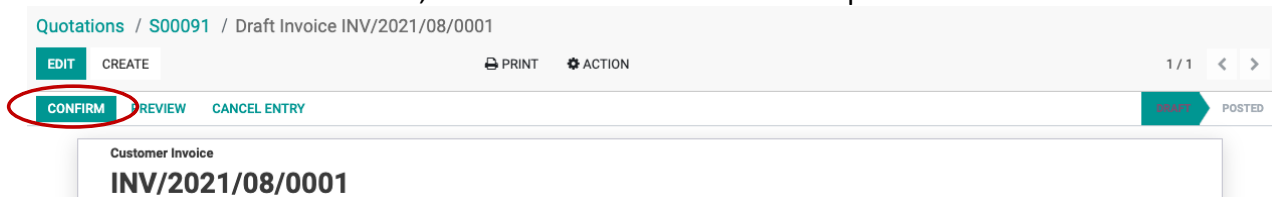
Once the Sales Order has been confirmed, you can click on the **Create Invoice** button to create an invoice from that Sales Order.



Select the payment terms, and click on **Create and View Invoice**.



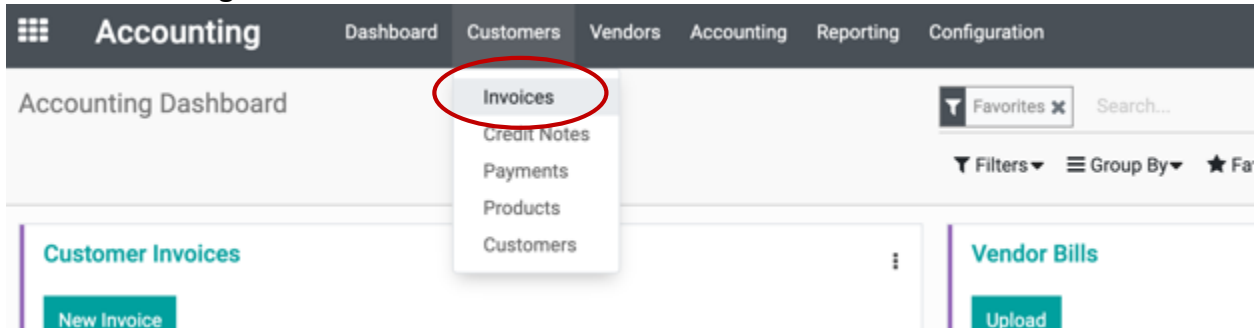
The invoice will be set as draft, confirm the invoice so it can be posted.



xi. Manually create invoices

In special cases, where you do not wish to generate invoices directly from sales order, you may still do it manually in the accounting module without it linking to any specific order.

Go to **Accounting Module**→**Customers**→ **Invoices**



Click on the **Create** button to create a new Invoice. Insert the details for the invoice such as Customer name, delivery address, invoice date. To add a product information, click on **Add a line** and insert the product name, quantity and price. Click on **Save** and later click on **Confirm** when the invoice has been confirmed by the client.

