

# Turn a Quote into a Sales Order

## Entering Sales Orders - Turning Quotes into Sales Orders

Customers place order with us over the phone, via email, and online. Some customers use Purchase Orders (PO's), some pay by credit card, others use Metals Credit (Also referred to as brass credit), and others will have to pay with a wire before the order is placed (International orders. Sometimes they will place orders without there ever being a quote and other times they are placing an order based off a quote.

While the overall process is simple it's important to pay attention to the details. Failing to do so can cause delays in customer orders, excess shipping costs, returns, and overall a bad customer experience. The specific steps to follow are below. If a situation isn't covered here please refer to your manager.

- The customer will contact you via phone or email saying they want to place an order.
- If they are placing an order over the phone and it's not based on a quote (for example a consumer calling in) follow the quote process to create the order. Take a credit card for payment.
  - Note there are additional steps the below process will cover.
- Customer sends a Purchase Order via email



**PURCHASE ORDER**

Page: 1

Purchase Order PO242735A  
Purchase Order Date: 5/8/2025

To: ACTION TARGET  
3411 S. MOUNTAIN VISTA PKWY  
PROVO, UT 84606

Ship To: TALLMADGE POLICE DEPARTMENT  
RYAN BECKETT #330-633-4231 Ext. 2 PO# 2025001002  
53 NORTHEAST AVE.  
TALLMADGE, OH 44278

Tax Ident. Type Legal Entity  
Ship Via Standard  
Receive By  
Terms  
Vendor Order

Confirm To Buyer  
Phone No. (812)288-5740  
Vendor ID ACTION  
Vendor Invoice No.

Item No.	Description	Unit	Quantity Ordered	Quantity Received	Unit Price	Total Price
ACTIOPOTA-RQT2	ACTION TARGET OPOTA QUALIFICATION TARGETS Q# 416817	EACH	300	0	0.37	111.00
				0		

Subtotal: 111.00  
 Invoice Discount: 0.00  
 Tax: 0.00  
 Total: 111.00

- We need to verify that this order has not been placed.
- Open Sales Order and Quote History Inquiry
  - Search by Customer PO
  - If there's nothing there search by customer name
  - If nothing pulls up you can enter the order.

Order Number	Sales Order No.	Order Date	Order Status	Customer No.	Bill To Name
1 Header	0000288	8/3/2021	Completed	0093288	Discount Gun Mart - San Diego
Order Date	0012971	5/25/2020	Completed	0012971	Crossfire Recreational Center
Customer No.	0021904	11/14/2022	Completed	0134027	Aquila International, LLC
Customer PD	0036731	4/19/2022	Completed	0036731	Lawmen's Safety
Status	0037505	6/11/2021	Completed	0126313	Granite State Indoor Range
Cancelled Code	0039222	10/11/2022	Completed	0138546	County Auditor
Last Invoice Date	0039611	1/11/2023	Deleted Quote	W254731	Cumberland County Sheriff's off
Last Invoice No.	0039823	4/30/2021	Deleted Quote	0135804	Arena Training Facility
Ship Date	0071154	5/11/2022	Completed	0071154	Stafford Creek Corrections Cen
Sales Tax	0102791	11/29/2023	Completed	0102791	LA Police Gear, Inc.
Schedule	0132847	10/22/2020	Deleted Order	0132847	William Conway
	0133533	9/29/2020	Deleted Quote	0133533	GunFighter Canyon
	0138119	4/15/2024	Quote	0143345	Store Training Account
	0138185	2/18/2025	Deleted Quote	0138185	Covington Police Department - Virginia
	0138598	6/25/2021	Deleted Quote	0138598	FDA/ Dto of Criminal Investigations
	0140253	1/18/2023	Completed	0140253	Oregon Department of Corrections
	0141095	5/16/2023	Deleted Quote	0141095	IFT Solutions
	0143345	4/29/2025	Deleted Order	0143345	Store Training Account
	0241587	3/7/2014	Completed	0888575	Dept Wildlife, Fisheries & Parks
	0263512	9/27/2022	Completed	0263512	Eagle Peak Shooting Range
	0274954	9/29/2025	Completed	0086975	Bernalillo County
	0296890	10/27/2016	Deleted Order	0036482	Anne Arundel Co Police Dept
	0296891	10/27/2016	Completed	0034930	Riverview Police Department
	0296892	10/27/2016	Completed	0093163	Pender Co. Sheriff's Office
	0296893	10/27/2016	Deleted Quote	0062308	Pelican Sales, Inc.
	0296894	10/27/2016	Completed	W136762	U. S. Marshals Service
	0296895	10/27/2016	Deleted Quote	0002537	Kanler Police Supply
	0296896	10/27/2016	Deleted Quote	0899956	Lawmen's Shooters Supply
	0296897	11/10/2016	Completed	0031022	Texas River Trip Police Dept

Search: Bill To Name | Begins with | End

Filters: View Standard

Custom... Search Interrupted Select

- Open sales Order Entry
  - If there is an existing quote like there is with this PO we will turn the quote into a sales order. If there is not that is okay we still will need to verify all of the same information. It's important to do your best to try and identify if there is an existing quote and turn it into a sales order if there is.
- On the purchase order this customer mentions the quote.

Item No.	Description
ACTIOPOTA-RQT2	ACTION TARGET OPOTA QUALIFICATION TARGETS Q# 416817

- Pull up the quote number in Sales Order Entry to pull it up.

The screenshot shows the 'Sales Order Entry (LET) 5/8/2025' window. The 'Order Number' is 0415917. The 'Order Date' is 4/30/2025 and the 'Order Type' is 'Quote'. The 'Customer No.' is 0002537, identified as 'Kiesler Police Supply'. The 'Status' is 'Open' with a reason of 'MINNESOTA'. The 'Sales Tax Schedule' is 'AVATAX'. Shipping options include 'In MN Shipping' (checked), 'In UT Shipping' (unchecked), and 'Ship Complete' (unchecked). The 'Ship Date' is 5/30/2025. Shipping details include 'Terms Code' '00 NET 30 DAYS', 'Ship Via' 'FEDEX GROUND', and 'Salesperson' 'HQ HOUSE'. The 'Delivery Telephone' is (812) 288-5740. The interface includes tabs for Header, Address, Lines, Totals, Payment, and InstaDocs, and buttons for Print Order, Print Pick, Recalc Price, Item Price, Accept, Cancel, and Delete.

- Change the order type to Standard Order
- Enter the PO number
- Make sure the IN MN or IN UT shipping is selected depending on the product.
- Enter the delivery phone number

The screenshot shows the 'Sales Order Entry (LET) 5/8/2025' window after modifications. The 'Order Number' remains 0415917, but the 'Order Date' is now 5/8/2025 and the 'Order Type' is 'Standard Order'. The 'Customer No.' is still 0002537, but the 'Cust PO' is now PD242735A. The 'Status' is 'Open' with a reason of 'MINNESOTA'. The 'Sales Tax Schedule' is 'AVATAX'. Shipping options include 'In MN Shipping' (checked), 'In UT Shipping' (unchecked), and 'Ship Complete' (unchecked). The 'Ship Date' is 5/13/2025. Shipping details include 'Terms Code' '00 NET 30 DAYS', 'Ship Via' 'CUSTOMER CHOICE', and 'Salesperson' 'HC HARRISON CUTLER'. The 'Delivery Telephone' is 330-633-4231. The interface includes tabs for Header, Address, Lines, Totals, Payment, and InstaDocs, and buttons for Print Order, Print Pick, Recalc Price, Item Price, More, Accept, Cancel, and Delete.

- Then go to the address tab.

- Ensure the bill to address matches what is on the Purchase Order. If not verify you are entering this order on the correct account. If you are then it will need to be updated in customer maintenance then on the Sales order.

- Enter the s
- There will deliver to e

what say ship to or verify with the

customer.

- On the 2nd and/or the 3rd line it's important to make sure you get a name and phone number as a point of contact for delivery. This is often not included on PO'S and you will have to ask the customer for it. At the same time make sure you ask if they need a liftgate at delivery or if they have any other specific shipping requirements. If they do those will be entered in the line items.
- The ship to address is super important. We need to get this right. If we do not it's expensive to have it picked back up and shipped to the incorrect customer. Plus it creates a bad customer experience.
- Next go to the line items tab.
- Verify the Item Code, qty, unit price, and product total match what's on the customers PO.
  - Note we are doing prices at 4 decimal points. Some customers can only do 2. So it will be rounded up or down.

Order Number 0416817

1. Header 2. Address 3. Lines 4. Totals 5. Payment 5. InstaDocs User: harris

Item Code	Product Type	Ordered	Unit Price	Extension	DC	DS	Warehouse	U/M
OPOTA-RQT2	Finished Good	300	3675	110.25	<input type="checkbox"/>	<input type="checkbox"/>	000	EACH
2		0	.0000	.00	<input type="checkbox"/>	<input type="checkbox"/>		

Description	NEW OPOTA QUALIFICATION TARGET
Shipped	0
Back Ordered	0
Price Level	1
Tax Class	TX

Average Cost = .1831 | Profit Margin % = 50

Total Amount 110.25

ScanForce

- If the total price of the Sales Order exceeds what's on the customers PO and the only difference is the 3rd and 4th digit make it match what's on their PO.

Order Number 0416817

1. Header 2. Address 3. Lines 4. Totals 5. Payment 5. InstaDocs User: harris

Item Code	Product Type	Ordered	Unit Price	Extension	DC	DS	Warehouse	U/M
OPOTA-RQT2	Finished Good	300	.3700	111.00	<input type="checkbox"/>	<input type="checkbox"/>	000	EACH
2		0	.0000	.00	<input type="checkbox"/>	<input type="checkbox"/>		

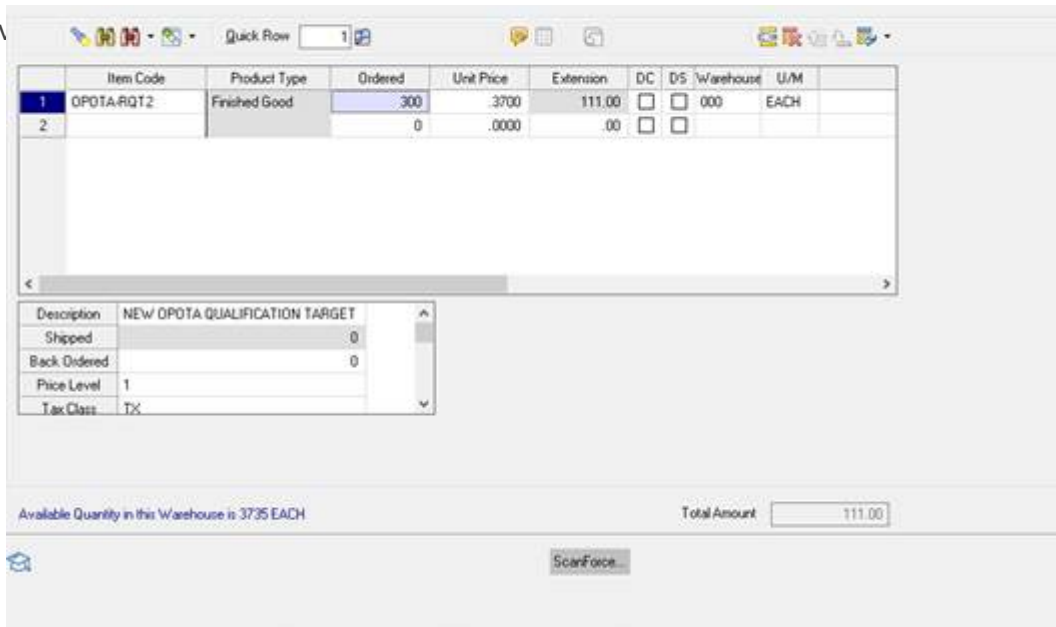
Description	NEW OPOTA QUALIFICATION TARGET
Shipped	0
Back Ordered	0
Price Level	1
Tax Class	TX

Total Amount 111.00

ScanForce

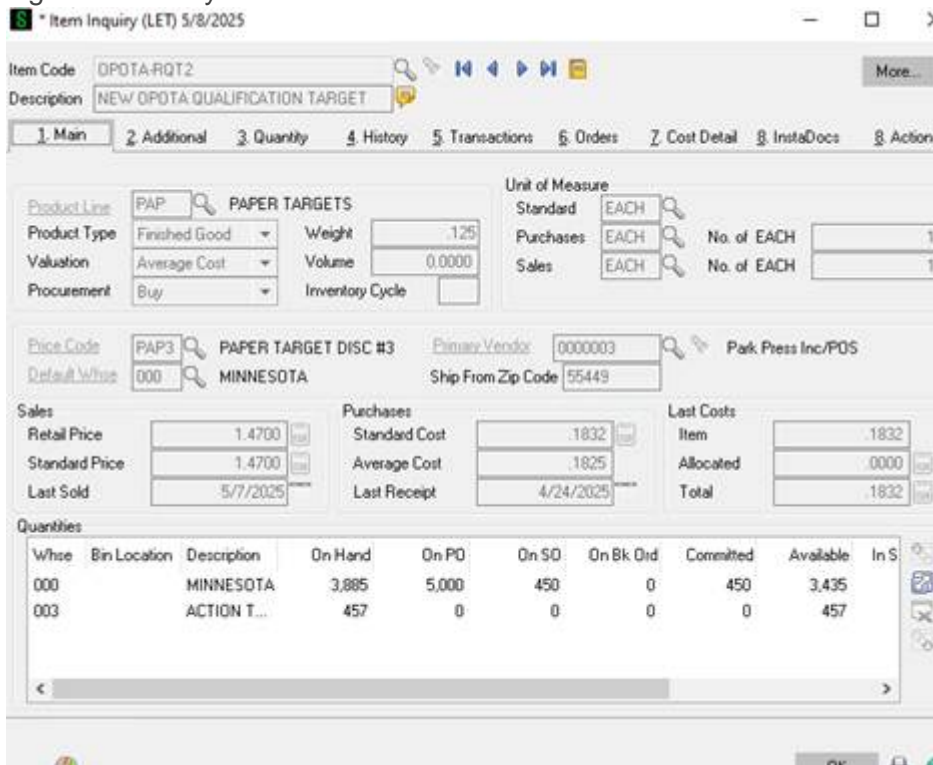
Print Order... Print Pick... Recalc Price Item Price More... Accept Cancel Delete

- At this point



ordered cell.

- You can see in the bottom left we have over 3,000 available. So this order would be considered shippable. And the estimated lead time would be 4 - 5 business days. If there was not enough in stock right click on the item and click on item inquire.
- Doing so will take you here:



- At the bottom of this screen you can see we have 3885 on hand. That number is not what is available to ship it's what is on the shelf. If you take on hand minus On SO (SALES ORDER) that will give you the qty available we could ship on this order.
- If we do not have enough available to ship to determine the lead time go to the tab labeled as Orders (number 6)

\* Item Inquiry (LET) 5/8/2025

Item Code: OPOTA-RQT2  
Description: NEW OPOTA QUALIFICATION TARGET

1. Main 2. Additional 3. Quantity 4. History 5. Transactions 6. Orders 7. Cost Detail 8. InstaDocs 9. Action

Purchase Order  Sales Order

Order No.	Type	Vendor No.	Vendor Name	Req. Date	Whse	Ordered	Received	Back Ordered
0046759	Stand...	0000003	Park Press Inc/P...	1/12/2024	000	8,000	8,000	0
0046976	Stand...	0000003	Park Press Inc/P...	3/6/2024	000	8,000	8,000	0
0047061	Stand...	0000003	Park Press Inc/P...	3/25/2024	000	5,000	5,000	0
0047108	Stand...	0000003	Park Press Inc/P...	4/3/2024	000	5,000	5,000	0
0047153	Stand...	0000003	Park Press Inc/P...	4/12/2024	000	3,000	3,000	0
0047219	Stand...	0000003	Park Press Inc/P...	4/29/2024	000	8,000	8,000	0
0047788	Stand...	0000003	Park Press Inc/P...	8/29/2024	000	8,000	8,000	0
0047813	Stand...	0000003	Park Press Inc/P...	9/5/2024	000	8,000	8,000	0
0048184	Stand...	0000003	Park Press Inc/P...	12/5/2024	000	8,000	8,000	0
0048506	Stand...	0000003	Park Press Inc/P...	2/19/2025	000	4,500	4,500	0
0048680	Stand...	0000003	Park Press Inc/P...	3/28/2025	000	8,000	8,000	0
0048807	Stand...	0000003	Park Press Inc/P...	4/24/2025	000	5,000	5,000	0
0048860	Stand...	0000003	Park Press Inc/P...	5/1/2025	000	5,000	5,000	0
0048967	Stand...	0000003	Park Press Inc/P...	5/29/2025	000	5,000	0	5,000

Ordered: 159,500    Received: 154,500    Back Ordered: 5,000

- Here we can see all of the purchase orders we have issued for this Item code.
- The Req Date is when we expect to have more of these. If the amount on order will cover what you need for the order then add 3 - 5 business days to that day to get to the estimated ship date.
- Note this has to be done for every product on the order. Take the item with the furthest out data that is not in stock/currently fulfillable to get to the estimated ship date.
- If the order is not in stock/fulfillable go back to the Sales Order Header tab

\* Sales Order Entry (LET) 5/8/2025

Order Number: 0416817

1. Header 2. Address 3. Lines 4. Totals 5. Payment 6. InstaDocs

Order Date: 5/8/2025    Order Type: Standard Order    Master/Repeating No.    Pick Date

Customer No.: 0002537    Kiesler Police Supply    Promoted to Order On: 5/8/2025

Cust PO: PD242735A

Ship Date: 5/13/2025

Status: Open    Reason:    Whse: 000 MINNESOTA

Sales Tax: AVATAX

In MN Shipping:     Ship Date Set:     In UT Shipping:     Use Metals Credits:     Ship Complete:     \*printed

Print Order:     Print Pick Sheets:     No. of Ship Labels: 0

Quick Print Without Displaying Printing Window:

Ship To Addr:    Terms Code: 00 NET 30 DAYS    Ship Via: CUSTOMER CHOICE F08

Confirm To:    E-mail: Accountspayable@kiesler.com    Fax No.: (812) 288-7560    Batch Fax:

Comment:    Salesperson: HC HARRISON CUTLER    Telephone: (812) 288-5740    Date In Shipping:

Ecomm Partner:    Delivery Telephone: 330-633-4231

ScanForce...

Print Order... Print Pick... Recalc Price Item Price    More...    Accept Cancel Delete

- Change the status to hold and select the reason as insufficient qty.

Status: Hold Reason: NSQTY  
 Warehouse: 000 MINNESOTA  
 Sales Tax: [ ]  
 Schedule: [ ]

- Doing this will prevent the Pick Sheet from being printed at the warehouse until there is stock.
  - We do not want it to print as it will waste the warehouses teams time they could better spend on fulfilling orders or it will lead to excess shipping costs due to fulfilling a partial order, backordering, then shipping the rest of the order when it comes into stock. When we only calculated shipping as 1 shipment.
- Next go to the totals tab.
- Ensure the Order total matches the total on the PO.
  - If it does not determine why. Most commonly the PO will be missing shipping or not have taxes when our quote does. If that is the case ask the customer if they can send an updated PO with shipping or ask for and apply their tax exemption before placing the order so taxes come off.

\* Sales Order Entry (LET) 5/8/2025

Order Number: 0416817

1. Header 2. Address 3. Lines 4. Totals 5. Payment 6. InstaDocs

Order Date: 5/8/2025 Order Type: Standard Order

Customer No: 0002537 Kiesler Police Supply Salesperson: HC

Amount Subject to Discount: .00  
 Discount Rate: .000%  
 Discount Amount: .00

Deposit Payment Type: CHECK  
 Check Number: [ ]  
 Deposit Amount: .00

Taxable Amount: .00  
 Non-Taxable Amount: 111.00

Commission Rate: 0.000%  
 Sales Tax Amount: .00  
 Order Total: 138.34

Ship Zone: [ ]  
 Ship Weight: [ ]  
 Total Weight: 37.50  
 Freight Amount: 27.34

Free Shipping: No

Customer Shipping Accounts

Delivery Service	Account
FedEx Ground	335 539 760

Buttons: FedEx, UPS

Print Order, Print Pick, Recalc Price, Item Price, More..., Accept, Cancel, Delete

- Notice in this example the totals do not match. Their PO is for \$111.00 and our total is \$138.34.
- We can easily determine that is from them not having shipping.
- With this specific customer that is because we ship on their FedEx Account.
  - If we are shipping on the customer's account 0 out shipping cost. Put the delivery service and account number as seen above on the totals tab. If we always ship on their account there will be a note and the same information under customer maintenance. Also ensure the ship to method is changed to customer choice on the main Header tab.

Sales Order Entry (LET) 5/8/2025

Order Number: 0416917

Order Date: 5/8/2025 Order Type: Standard Order

Customer No.: 0002537 Kiestler Police Supply Salesperson: HC

Amount Subject to Discount: .00  
 Discount Rate: .000%  
 Discount Amount: .00

Deposit Payment Type: CHECK  
 Check Number:   
 Deposit Amount: .00

Taxable Amount: .00  
 Non-Taxable Amount: 111.00

Commission Rate: 0.000%  
 Sales Tax Amount: .00  
 Order Total: 111.00

Ship Zone:   
 Ship Weight:   
 Total Weight: 37.50  
 Freight Amount: .00

Free Shipping: No

Customer Shipping Accounts

Delivery Service	Account
FedEx Ground	335 939 760

Buttons: FedEx, UPS

Buttons: Print Order, Print Pick, Recalc Price, Item Price, More, Accept, Cancel, Delete

- If the order is placed with a PO save the PURCHASE ORDER AS PO(THEIR PO NUMBER) - PO 242735A in this case.
- Drag and drop a copy of the PO into Instadocs.

Sales Order Entry (LET) 5/8/2025

Order Number: 0416917

Document Directory: \\ATI-FS001\SAGE\DOCS\ARI\00002537\_KIESTLER POLICE SUPPLY\

Name	Size	Type	Modified
PO242735A	201 KB	Microsoft Edge PDF Document	5/8/2025 10:43 AM

Attach Tagged Documents to Email Deliveries:

Buttons: Print Order, Print Pick, Recalc Price, Item Price, More, Accept, Cancel, Delete

- Now hit accept to place the order.
- Email the customer something like: Hi Name, Thank you for the order: Estimated ship date: 5/30/25 based on what you determined the lead time to be.

Revision #2

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