



LEADERS HOLDING CO.TM

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Convert an Opportunity to a Quote to a Sales Order

NetSuite's CRM (customer relationship manager) is a powerful way to organize and manage your interactions with guests. If you take the time to use it correctly you will give your guests a more powerful comprehensive presentation, make it easier for the guest to buy and close more sales. An important part of this powerful tool is the ability to convert Opportunities and Quotes into Sales Orders.

- ✓ An Opportunity is converted to a Quote. A Quote is converted to a Sales Order. You cannot skip a step.
- ✓ For more information on CRM see the section titled Stages of A Customer in the Procedure Manual.

Pricing on a quote expires in 10 days or at the end of a sale period whichever comes first.

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Note: When converting an opportunity to a quote you must have all of the required fields on the customer record filled out. If you do not you will automatically be redirected from the quote to the customer record to complete the fields. You will have to go back to the quote through recent records or Sales/Transactions subtab on the customer record.

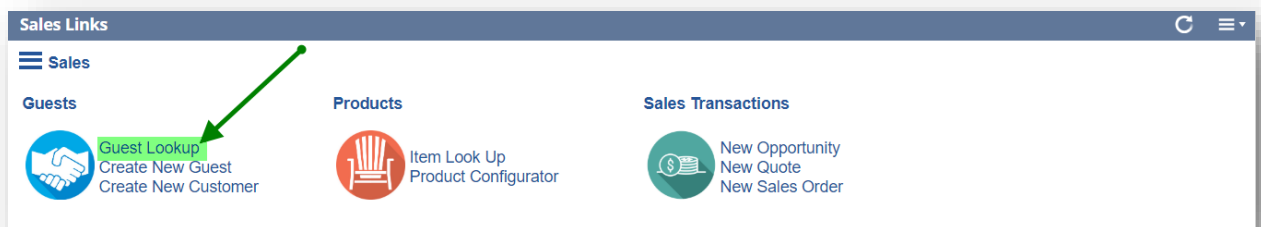
Close an Opportunity

To close an Opportunity, in Edit Mode, set the probability of the Opportunity to 0% and click [Save](#)

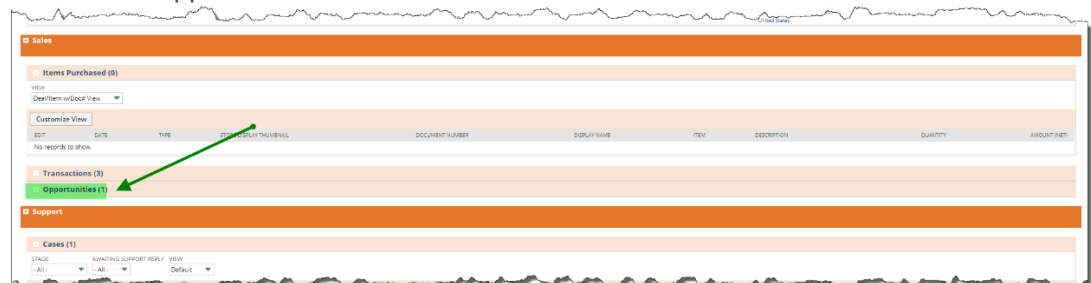
Convert an Opportunity to a Quote

Note: When converting an opportunity to a quote you must have all of the required fields on the customer record filled out. If you do not you will automatically be redirected from the quote to the customer record to complete the fields. You will have to go back to the quote through recent records or Sales/Transactions subtab on the customer record.

1. There are two methods to find an opportunity
 - a. The easiest is to type the customer's last name, email, or customer number in the global search. It will show all their customer record and open opportunities. Simply click on the opportunity you are looking for.
 - b. From the NetSuite Dashboard Look Up a Guest



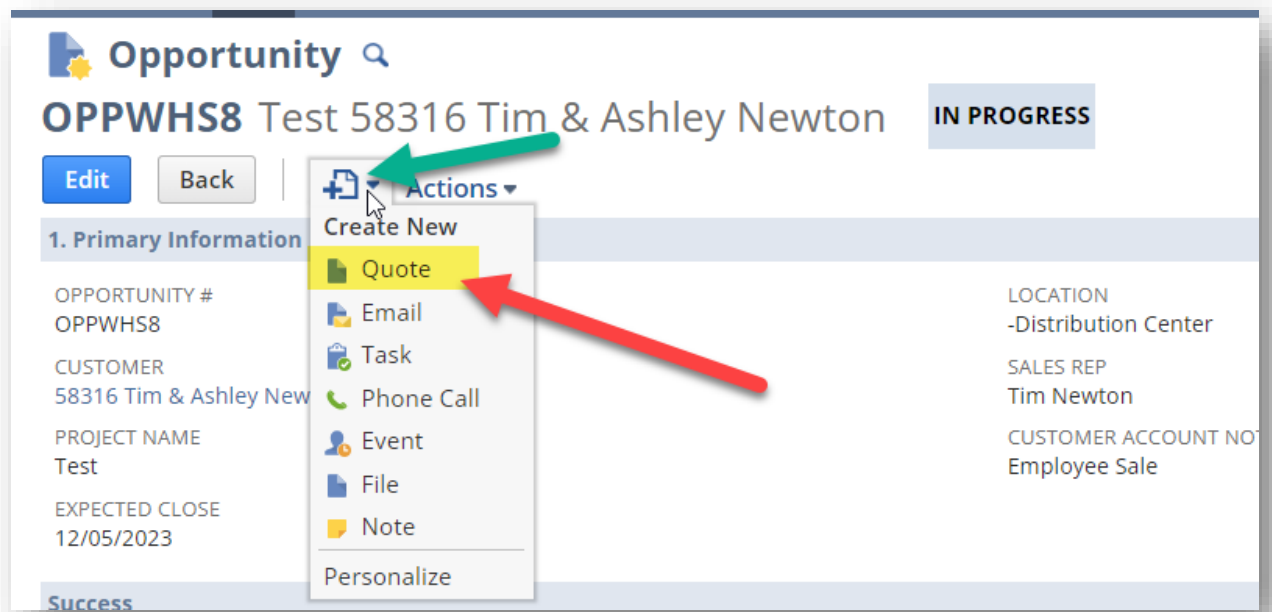
- i. From the Guest Record in View mode scroll down to the “Sales” tab and expand the “Opportunities” subtab



- ii. Open the opportunity in View mode by clicking on the Date, Title, or Document Number. Do not click on Edit. If you open by mistake in Edit mode, simply press [Save](#) to go to View.

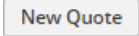


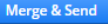
EDIT	DATE	TITLE	DOCUMENT NUMBER	CUSTOMER	OPPORTUNITY STATUS	EXPECTED CLOSE	PROJECTED TOTAL	PROBABILITY	FORECAST TYPE
	03/23/2019	Back Porch	OPPERT1	23 James H Calhoun	In Discussion	03/23/2019	100.00	20.0%	Omitted
	03/08/2018		17	23 James H Calhoun	Purchased	03/08/2018	2,029.98	100.0%	Omitted

2. While reviewing the opportunity hover over  and click Quote



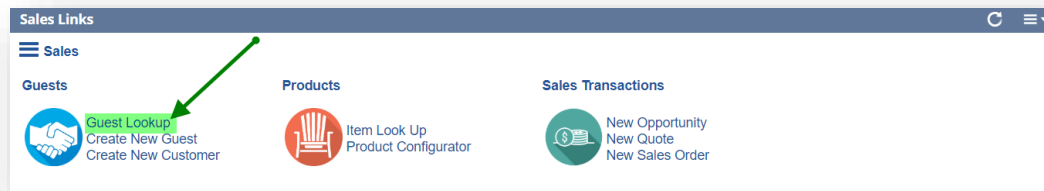
3. This will move the Opportunity information into a Quote. An Opportunity does not have specific product information. To save the new quote, you will have to complete all of the required fields, including the products the guest is interested in.

Creating a Quote

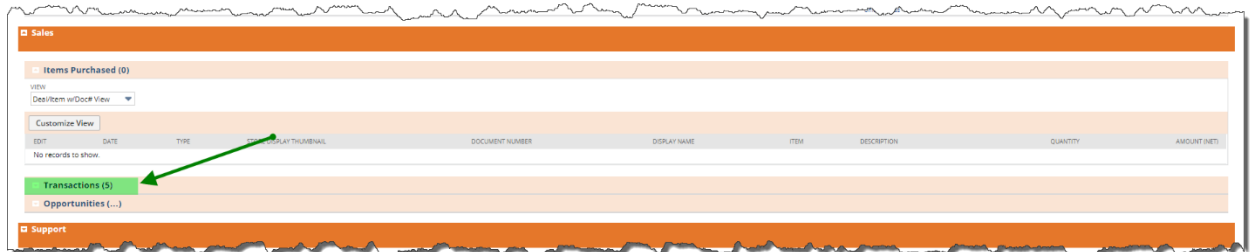
1. From the customer account click 
2. Fill out the required fields. Required fields are marked with an  in the primary information, 2. Items tab and 3. Shipping tab.
 - a. The more accurate and detailed you are filling out all the fields on a quote the easier it will be to follow up with your best prospects to increase your level of service and income.
3. Press 
 - a. The quote will not automatically email. If you would like to email the quote to the guest follow these steps.
 - i. Hover over **Actions** ▼ on the top of the quote.
 - ii. Click “Email”
 - iii. Check to make sure the email is going where you want on the Recipients tab
 - iv. On the Message tab select
 1. Template Category: Retail Customer Communication
 2. Template: Retail | Quote
 3. Click 
 - b. To continue on a path to a Sales Order skip to Step 4 below.

Quote to a Sales Order

1. From the NetSuite Dashboard, Guest Lookup



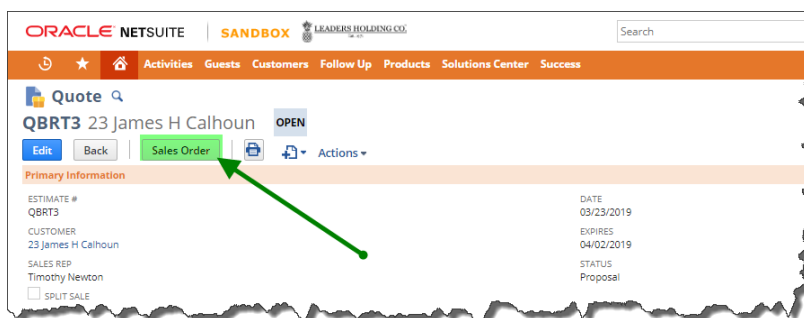
2. From the Guest Record in View mode Click the Sales tab and view the Transactions subtab



3. Select the Quote you would like to convert into a Sales Order by clicking the Date or Document Number.

EDIT	DATE	TYPE	DOCUMENT NUMBER	AMOUNT	STATUS	REPLACEMENT ORDER	CREATED FROM
	03/23/2019	Quote	QBRT3	642.00	Open	No	
Est	03/23/2019	Quote	QBRT4	107.00	Open	No	Opportunity #OPPBR1
Est	03/06/2018	Sales Order	185	2,053.87	Pending Fulfillment	No	Opportunity #OPPBR1
Est	03/06/2018	Sales Order	187	327.42	Pending Approval	No	Opportunity #17

4. Click the button **Sales Order**



5. The Quote will convert into a Sales Order and open in Edit mode. Make sure the information is correct and proceed with the transaction.

Note: A Sales Order will not approve, reserve or order merchandise unless there is a deposit.