ERPAdvance Asia

FOR SAGE 300

NORMING RESOURCE MANAGER · SALES

# Sales Quotation

## Approved quotes that become Sage 300 sales orders

Sales staff build quotes on web or mobile using Sage 300 customers, items and price lists. Discounts are approved before the quote goes out, and won quotes create Sage 300 sales orders.

### HOW IT WORKS

**Quote**
Sage 300 prices default

→

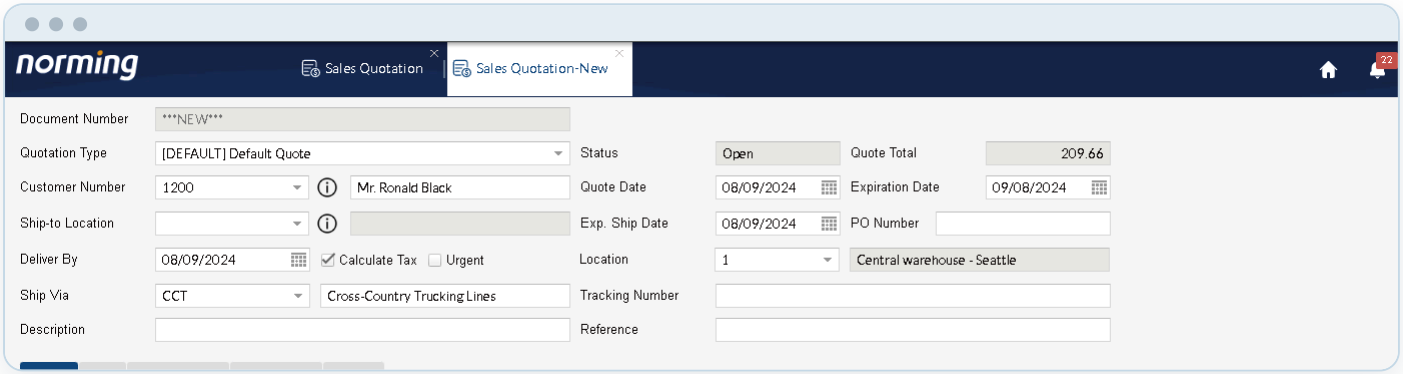
**Approve**
By discount or value

→

**Send**
PDF emailed to customer

→

**Win**
O/E order in Sage 300




Sales quotation entry

### KEY CAPABILITIES

**Discount approvals**
Route quotes to different managers depending on the discount or other conditions.

**Credit limit check**
Warn when a customer's outstanding balance exceeds the credit limit.

**Revision history**
Create revisions manually or automatically, keeping every earlier version.

**Margin on every line**
See base price, unit cost and gross profit margin on each quote line.

**One-click send**
Email approved quotes to customers as a PDF straight from the portal.

**Won, lost or on hold**
Only won quotes convert to a Sage 300 O/E document; lost quotes can be reopened.

### APPROVALS THAT DON'T GET STUCK

**Auto-escalation**
Moves up a level after the time limit you set.

**Delegation**
A substitute approves for you on set dates.

**Transfer**
Hand a request to a colleague to approve.

**Reminders**
Scheduled emails nudge pending approvers.

Creates a Sage 300 O/E quote or active order (needs O/E); integrates with I/C, A/P, G/L, PJC, Tax Services and optional fields. Entry and approval on web and mobile.

## See how it fits your business

Contact your Sage 300 partner or ERPAdvance Asia for a demo.

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