Convert a Quotation to a Sale

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Overview

This guide will help you convert an accepted quotation into one sale while preserving the source relationship.

Muhasib creates a sale and updates quotation status according to set up conversion status. Stock/payment/tax/GL effects belong to the resulting sale.

Who can do this

You need access to Quotation view/conversion plus POS Sale Add and nested payment rights.

Before you start

Confirm customer acceptance, quotation status/validity, item availability, current price/tax policy, stock, and payment terms.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Quotation Inquiry or POS quotation selection → Convert to Sale/Invoice.

Convert a Quotation to a Sale

Step 1: Select the exact quotation

Step 2: Confirm it has not already been converted

Step 3: Choose conversion

Step 4: Review customer, lines, quantities, prices, discounts, tax, location/batch/serial, and terms

Step 5: Resolve changes under approved policy

Step 6: Check out/finalize the sale once

Check your work

Compare and Confirm quotation status/source link, one sale/invoice, stock, customer ledger, payment, tax, and GL.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- After timeout, check both inquiries before retrying.
- Do not manually close the quotation to hide duplicate conversion.

Related guides

- Create a Quotation
- Create a POS Sale
- Review the Quotation Inquiry

What to do next

> **Create a Quotation**.

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