Convert an Appointment to a Sale

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Overview

This guide will help you convert a completed/allowed appointment into one sale and keep its source/status relationship.

Muhasib creates the sale and assigns the set up appointment conversion status. Sale effects include needed payment, stock, commission, tax, loyalty, and GL.

Who can do this

You need access to Appointment view/conversion and POS Sale Add.

Before you start

Confirm customer attendance, services/items delivered, staff, appointment status, deposit, prices/taxes, and stock.

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

Where to find it

Appointment Dashboard/Inquiry or POS appointment selection → Convert to Sale.

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Step 1: Select the exact appointment

Step 2: Confirm it is not already converted

Step 3: Choose conversion

Step 4: Review customer, actual lines/quantities, staff, price, tax, deposit/credit, and status

Step 5: Check out the resulting sale once

Check your work

Compare and Confirm appointment/source link/status, sale, deposit/payment, staff commission, stock, customer ledger, and GL.

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

If something goes wrong

- Check both appointment and Sale Inquiry after an uncertain result.

Related guides

- Create an Appointment
- Create a POS Sale
- Review the Appointment Inquiry

What to do next

> **Create an Appointment**.

Revision #0
Created 2026-09-04 09:21:05 UTC by Shah Rukh Saeed
Updated 2026-09-07 10:14:00 UTC by Shah Rukh Saeed