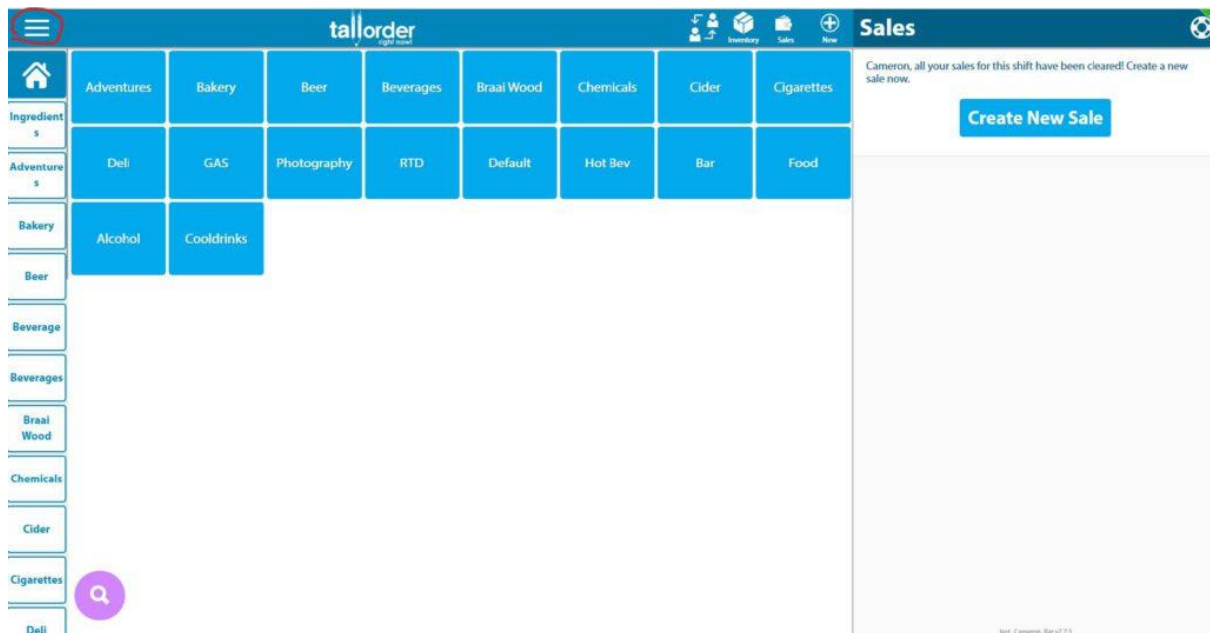
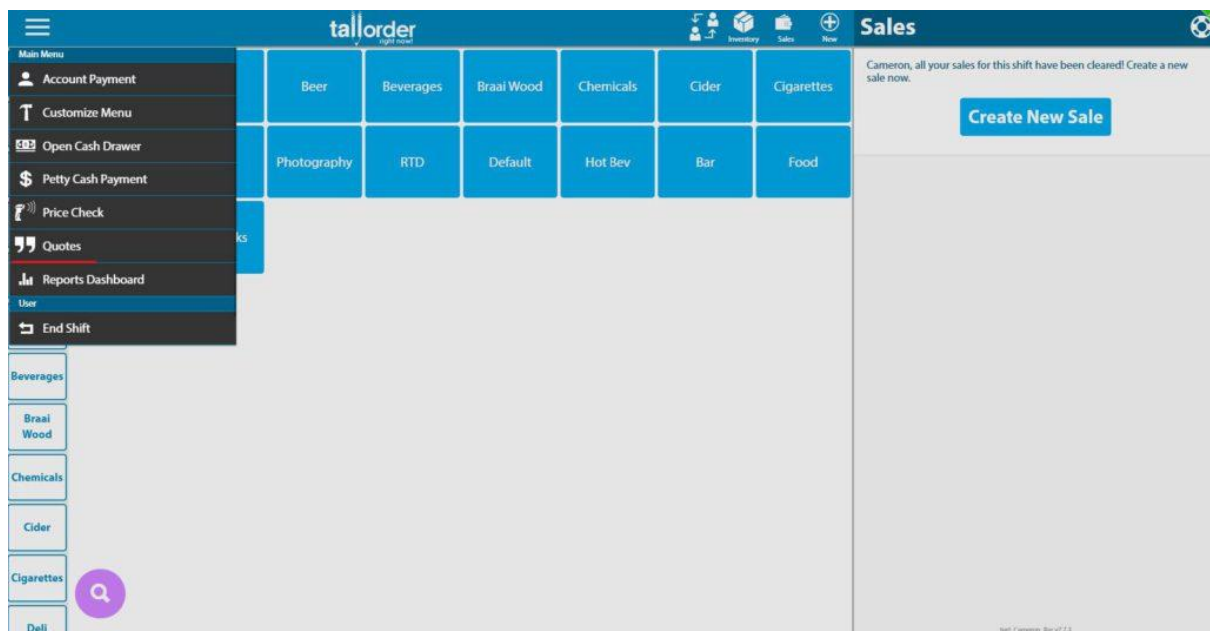


Here is a step-by-step on how to do an invoice/quote on the POS system.

Click on the Menu at the left-hand corner of the screen (resembles three stripes or a “burger” menu):



A drop-down menu will appear, scroll down and click on the “Quotes” option:



From here you can either choose to create a new quote or open a saved one.

To create a new quote click on the “New Quote” button:

Quote

Customer Name

Billing Address

Address Line 1

Address Line 2

Zip/Postal Code

City

Country

Same as Delivery?

Delivery Address

Address Line 1

Address Line 2

Zip/Postal Code

City

Country

Item Details

Let's get started
Add an item to your quote

+ Add Item

Save

Email / Print

Please fill in the customer name

Convert to Sale

Once you have added, or chosen, a customer you can then add the items by clicking on the “Add items” button in the middle on the screen.

Quote

Customer Name Cameron Knight

Billing Address

Address Line 1

Address Line 2

Zip/Postal Code

City

Country

Same as Delivery?

Delivery Address

Address Line 1

Address Line 2

Zip/Postal Code

City

Country

Item Details

Let's get started
Add an item to your quote

+ Add Item

Save

Email / Print

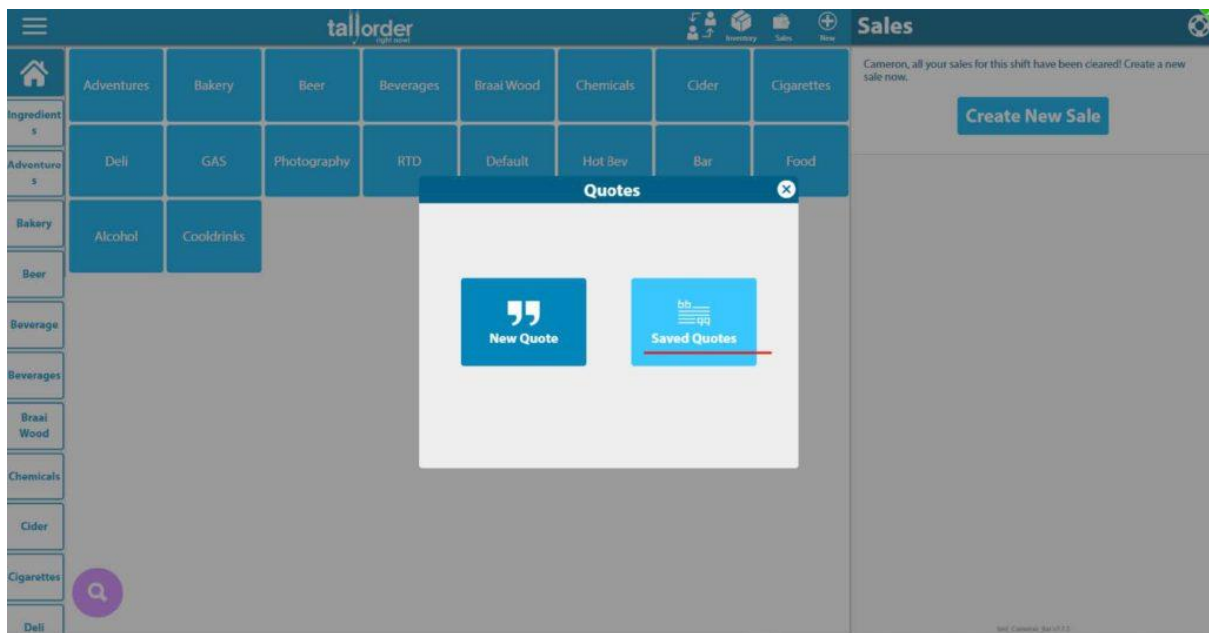
Convert to Sale

You can then search for the item by name, SKU, or barcode:

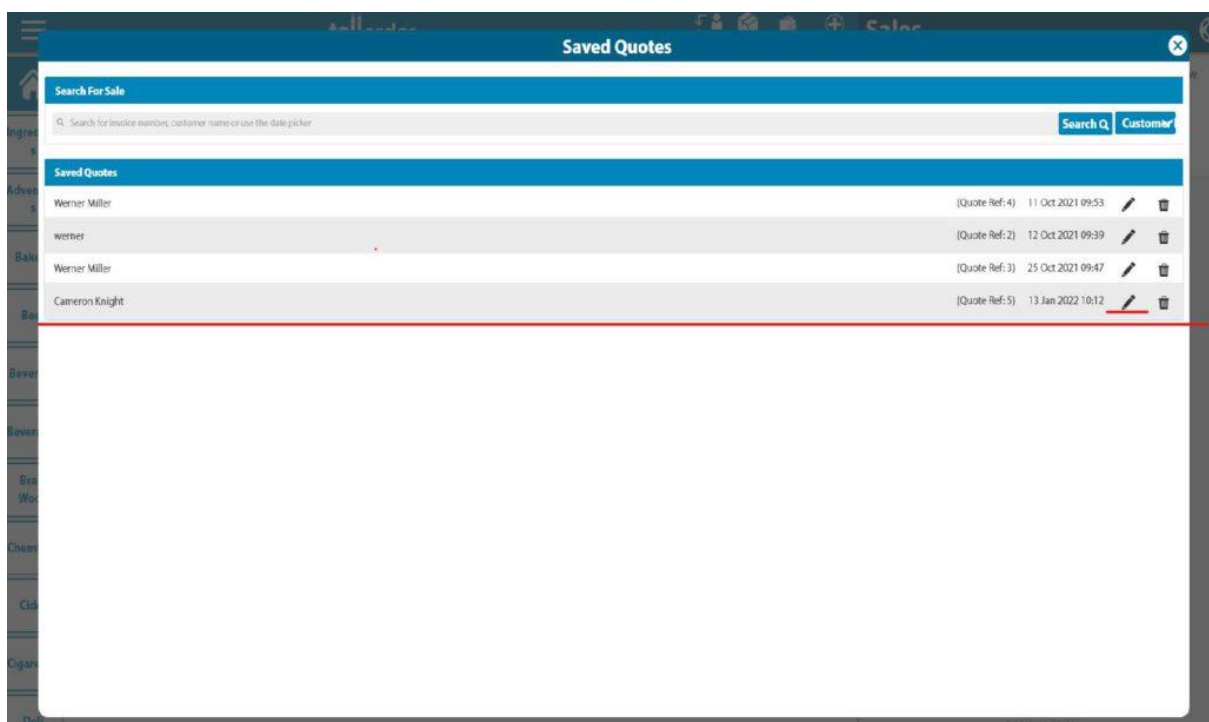
Once you added the items you can save, email or print the quote. You can save the quote and re-open it again when the customer wants to pay.

SKU	Item Name	Qty	Price	Total
HB192	Simonsig Gewurztraminer 2015	12	30.19	362.28
	Craft Beer	10	25.00	250.00
Sub Total				612.28
Total				612.28

Once the quote has been saved you can view it again by going to Quotes in the drop-down menu and selecting "Saved Quotes"



You can then select one of your saved quotes. From this screen, you can either delete a saved quote or edit it. to edit a quote click on the pencil icon in line with the relevant quote.



Once you have clicked on the pencil you can then make changes to the quote, save, email, print or convert the quote to a sale when the customer comes in to pay. Each of these options are visible at the bottom of the screen.

Quote

Customer Name

Cameron Knight

Billing Address

Address Line 1

Address Line 2

Zip/Postal Code

City

Country

Q Customer Look up

Same as Delivery?

Delivery Address

Address Line 1

Address Line 2

Zip/Postal Code

City

Country

Item Details

SKU

Item Name

Qty

Price

Total

HB192	Simonsig Gewurztraminer 2015	Qty 12	30.19	362.28
	Craft Beer	Qty 10	25.00	250.00
Sub Total				612.28
Total				612.28

Save

Email / Print

Convert to Sale

Once you have converted the quote to a sale it will open as a tab where you can complete the sale.