



Convert a Quote to a Job


Once a customer has accepted a Quote, you can convert it to a Job. All the information you have recorded on the Quote (e.g., supplies, customer and site details, etc) will be pulled through and form the basis of the Job Card.





You can choose for Ascora to copy across Notes, Supplies, Labour and/or Bookings when converting a Quote to a Job – subject to your preferred business work-flow. See the Ascora Implementation Guide to learn more about how to configure these settings.


From the Quote Card, click the **Convert to Job** button. The Quote will be instantly converted to a Job and the Job Card will now display on the screen. The status of the Quote will change to 'Won'.


 Mark As Lost


 Convert to Job


 Mark As Sent

 Copy

 Send Email

 Send SMS

 Create a Job Template from this Quote

 Download Quote