

Quote Orders

04/30/2025 3:19 pm CDT

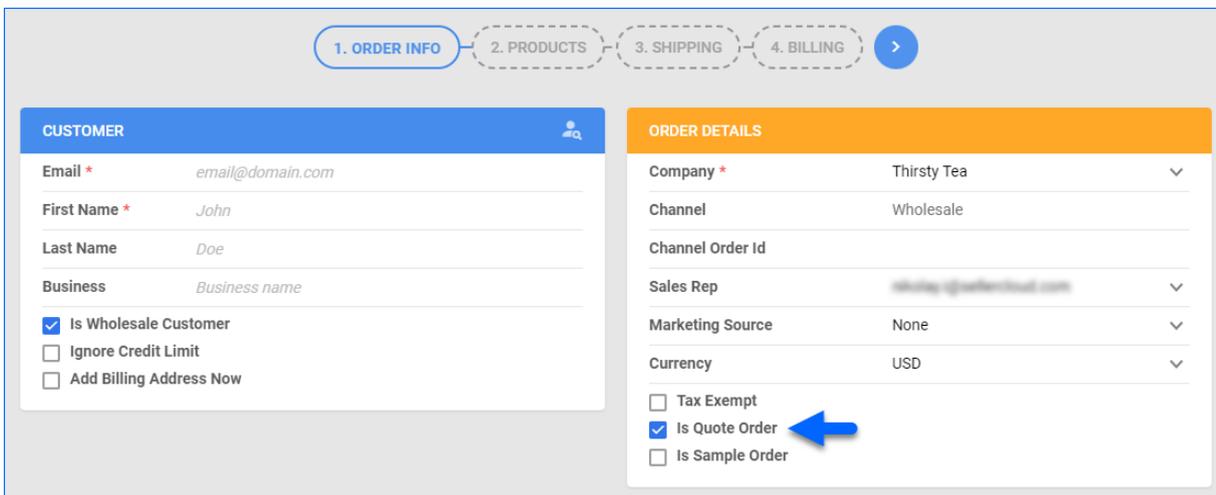
Overview

Quote orders allow you to create orders without reserving inventory. This feature can be used to help you establish repeat customers by providing transparent rates and order costs upfront. This approach is often used for wholesale clients seeking pricing before placing an order, but you can use it for any type of order and customer.

This article shows you how to create quote orders, send quote invoices, and convert orders back to normal. The [Client Setting Enable Wholesale Options in Manage Orders Action Menu](#) must be enabled for this workflow.

Create a Quote Order

Creating a quote order follows the steps for the manual creation of a [New Order](#) from the Order Tab. When you open the Wizard, check the **Is Quote Order** box in the **Order Details** panel of the first step.



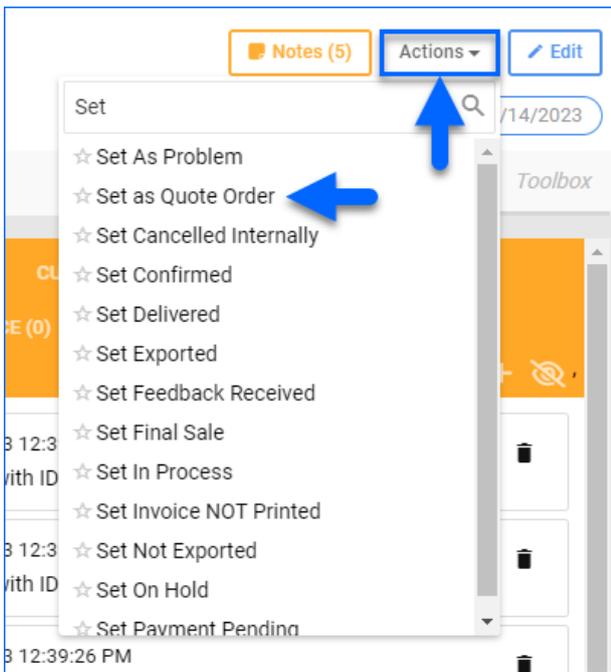
The screenshot shows the '1. ORDER INFO' step of the Order Wizard. The interface is divided into two main panels: 'CUSTOMER' and 'ORDER DETAILS'. The 'CUSTOMER' panel includes fields for Email, First Name, Last Name, and Business, along with checkboxes for 'Is Wholesale Customer', 'Ignore Credit Limit', and 'Add Billing Address Now'. The 'ORDER DETAILS' panel includes fields for Company, Channel, Channel Order Id, Sales Rep, Marketing Source, and Currency, along with checkboxes for 'Tax Exempt', 'Is Quote Order', and 'Is Sample Order'. A blue arrow points to the 'Is Quote Order' checkbox, which is checked.

CUSTOMER	
Email *	email@domain.com
First Name *	John
Last Name	Doe
Business	Business name
<input checked="" type="checkbox"/> Is Wholesale Customer	
<input type="checkbox"/> Ignore Credit Limit	
<input type="checkbox"/> Add Billing Address Now	

ORDER DETAILS	
Company *	Thirsty Tea
Channel	Wholesale
Channel Order Id	
Sales Rep	sales@thirstytea.com
Marketing Source	None
Currency	USD
<input type="checkbox"/> Tax Exempt	
<input checked="" type="checkbox"/> Is Quote Order	
<input type="checkbox"/> Is Sample Order	

Set Orders as Quote

To turn a single existing order into a quote order, go to the [Order Details Page](#), click **Actions**, and select **Set as Quote Order**.



To bulk-set quote orders:

1. Go to **Orders > Manage Orders**.
2. Find and select the orders you want to convert.
3. Click **Actions** on the bottom right and select **Update Order Status**.

<input type="checkbox"/>	ID	CHANNEL ORDER #	SKUS	DROPSHIP STATUS	SHIP TO NAME	ORDERED	GRAND TOTAL	QTY	C
<input type="checkbox"/>	5049460		1EW		FedEx	Quote			DropShip None
<input type="checkbox"/>	5049459		1EW		FedEx	Quote			DropShip None
<input type="checkbox"/>	5043150		1EW 3 + 1						
<input type="checkbox"/>	5040781								
<input type="checkbox"/>	5040605			3					
<input type="checkbox"/>	5040198		amazon						
<input type="checkbox"/>	5027280		lottest5 + 1						
<input checked="" type="checkbox"/>	5027230		1EW B00009ZK08 + 2						
<input checked="" type="checkbox"/>	5013735		1EW B00006JNNE						
<input type="checkbox"/>	5012777		17552 (MC)						
<input type="checkbox"/>	5012488	139							
<input type="checkbox"/>	5007015		1EW 003346F						
<input type="checkbox"/>	5006558		BLUEHAT						

Status

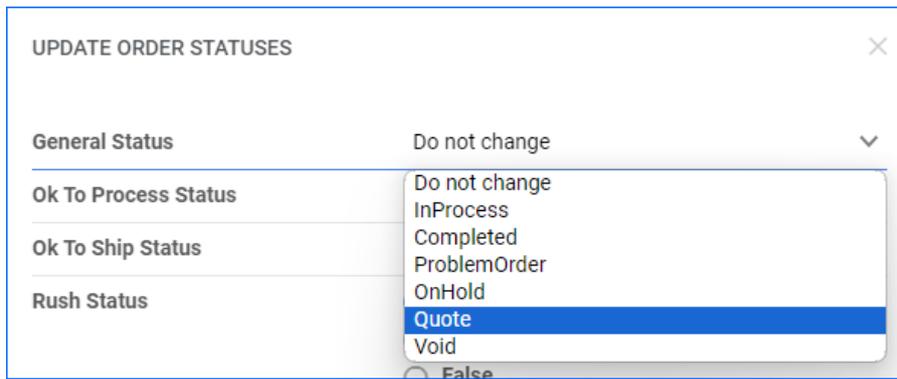
FAVORITES

ACTIONS

- ☆ Update Customer Service Status
- ☆ Query Innotrac Shipment Status
- ☆ Query Shipping Delivery Status
- ☆ Update Dropship Status...
- ☆ Re-Evaluate Payment Status
- ☆ Override Shipping Delivery Status
- ☆ Update Order Status...

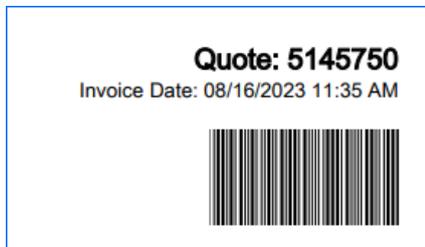
< Mark As Delivered

4. Set the **General Status** to **Quote**.
5. Click **Update**.



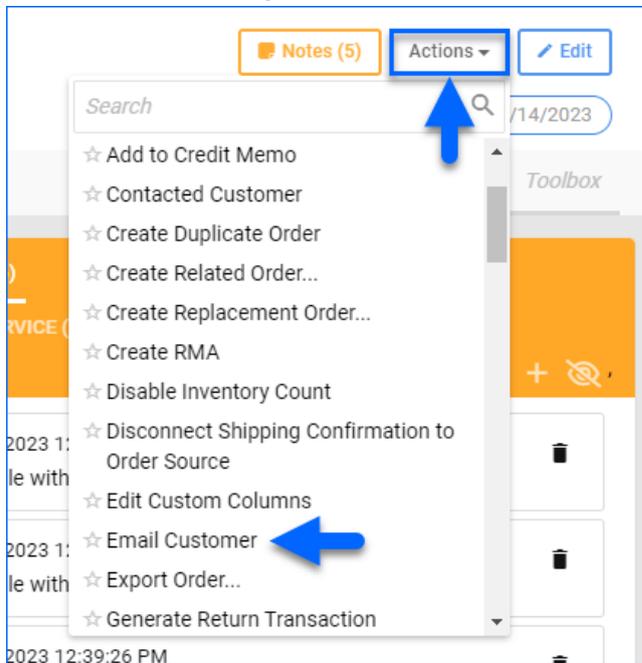
Email Quote Invoices

Now, you can email a quote invoice to the customer. The invoice will specifically say that it's a quote, and it will be marked as a **Quote Order Invoice**.



To email a quote invoice:

1. On the [Order Details Page](#), click **Actions** and select **Email Customer**.



2. Populate the required fields.
3. Optionally, you can select an [Email Template](#).
4. Optionally, you can also set the [Invoice Type](#) and create your own [Custom Invoices](#).
5. You can manually add a new **Attachment** or use the default one.

6. At the bottom of the **General** panel, check **Send Invoice**.

7. Click **Send**.

The image shows a 'GENERAL' panel for email configuration. It includes fields for 'Select Email Template', 'Email To' (with a blue bubble containing 'customer@example.com'), 'Cc', 'Subject' (with a placeholder 'Subject'), 'Sender Name', 'Sender Email', 'Attachment(S)' (with a placeholder 'Add attachment' and a paperclip icon), and 'Invoice Type' (with a value of 'Default'). The 'Send Invoice' checkbox is checked with a blue checkmark.

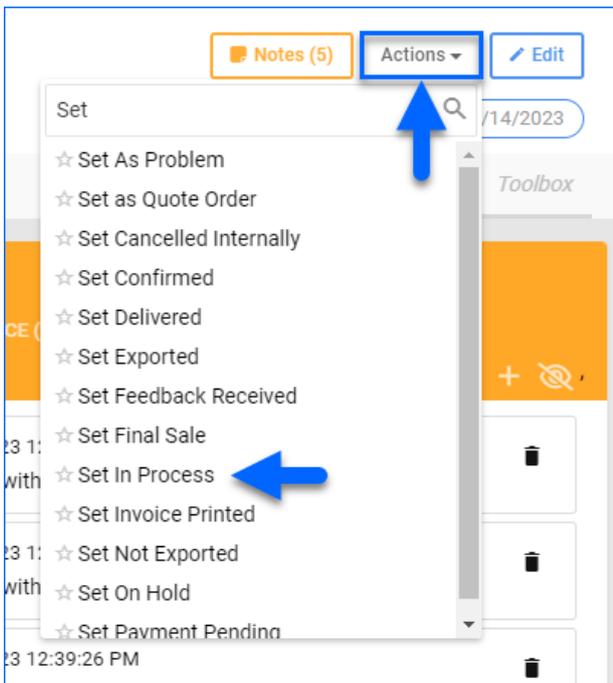
Fulfill Quote Orders

The [Client Setting Allow Shipping Unpaid Orders](#) allows you to ship unpaid orders. To be able to ship unpaid quote orders, you must also enable the Client Setting **Do Not Change AllowShippingWithoutPayment Status When Order Changed To Quote**.

By default, without the Client Settings above, you can't ship quote orders. Once your customer approves a quote order, you can convert it back to a regular order to resume the picking, payment, and fulfillment. Optionally, you can edit the order and update the **Order Date** to reflect the real sale time.

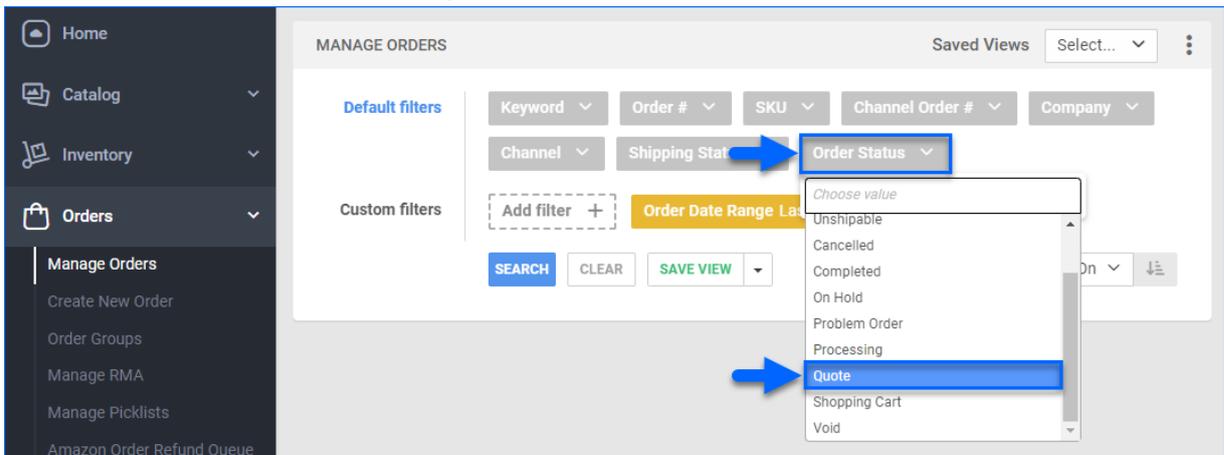
When a quote order is [Dropshipped](#) or [Linked to a PO](#), the quote order gets automatically set to **InProcess**.

To revert a quote order to a regular order, click **Actions** and select **Set in Process**.

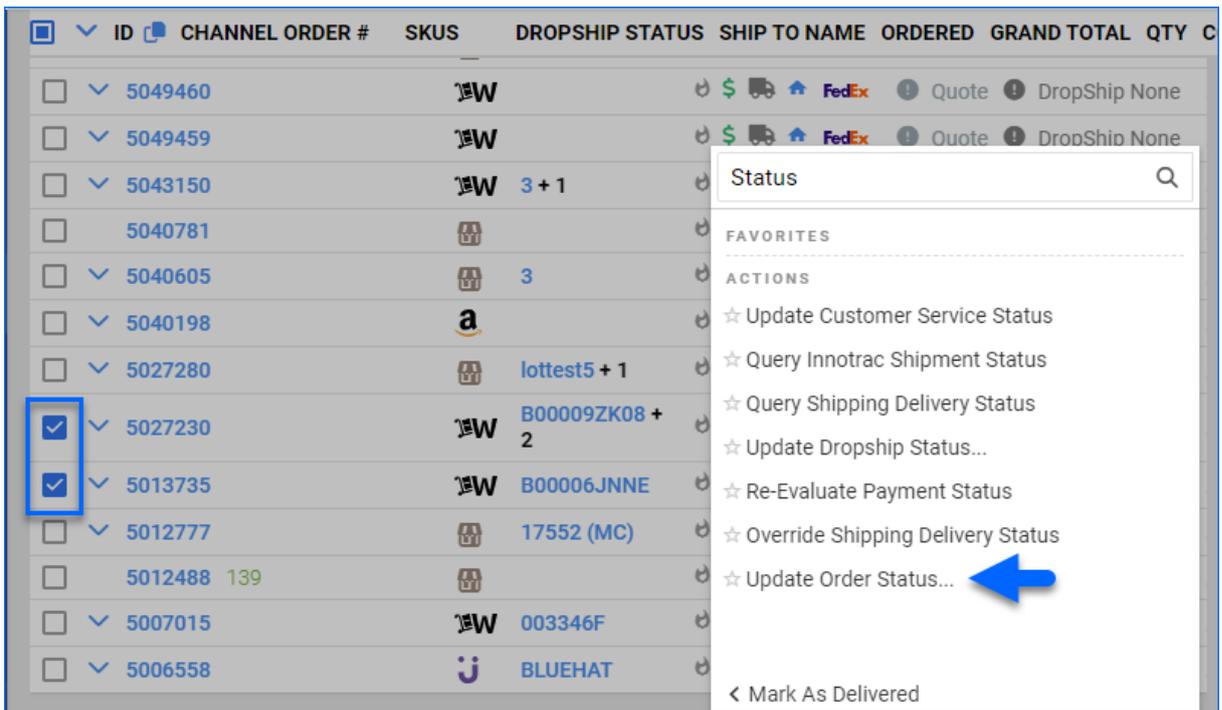


You can also bulk-convert quote orders to standard orders:

1. Go to **Orders > Manage Orders**.
2. Click the **Order Status** filter and set it to **Quote**.

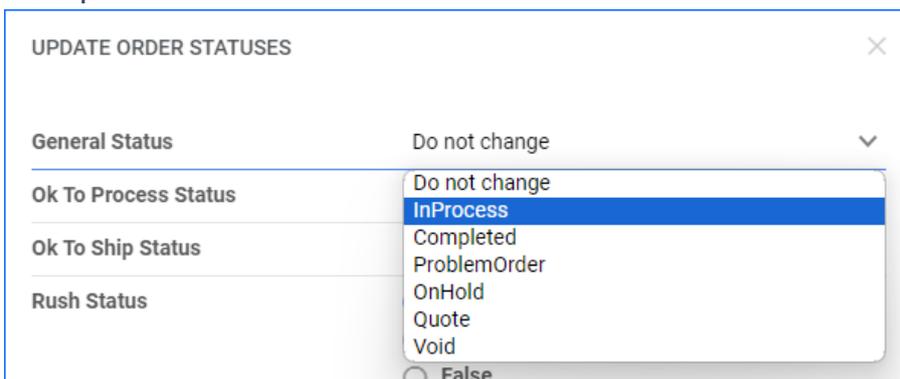


3. Click **Search**.
4. Select orders by checking the boxes on the left.
5. Click the **Actions** icon on the bottom right and select **Update Order Status**.



6. Set the **General Status** to **InProcess**.

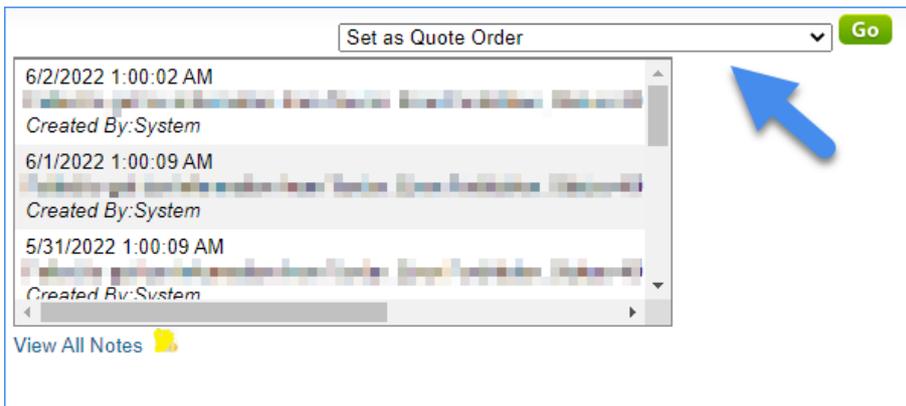
7. Click **Update**.



Quote orders

A quote order is a means of creating orders without reserving inventory. This is typically done for wholesale customers who want to see pricing or get a quote, before actually placing an order. When the order is approved the order can be updated as a regular order.

- Make sure that client setting **Enable Wholesale Options in Manage Orders Action Menu** is enabled.
- On the order detail page open the **Action** menu and select **Set as Quote Order**. Press **GO**.



- The order status will be set as **Quote**.
 - Typically you would print an order invoice or email it to the customer directly from Sellercloud. The invoice will be marked as a Quote Order Invoice.
 - When the order is approved by the customer, open the **Action** menu and select **Set InProcess**. This will remove the quote status and reserve inventory.
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