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ESP+ Orders Overview

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ESP+ Orders In-Depth Overview

Create Order

Orders can be initiated from a Product Search, a Collection, or the Overview tab of the Project. Quotes can be converted to Orders. After an order is created, it can be sent to the customer as an Order Acknowledgement and/or used to generate Purchase Orders and/or Invoices without any rekeying of information.

Quotes & Proofs

- Quotes can be initiated by the Customer via the Client Portal or by the Distributor in ESP+.
- Distributors can create and send proofs to the Customer via the Client Portal
- Customers can request changes to both quotes and proofs as well as approve them

Orders

- The Order is the master sales document
- Purchase Orders and Invoices are generated from the Order
- Distributors send order acknowledgements to the Customer
- Customers can access the Order via the Client Portal

Purchase Order(s)

- Purchase orders are created from the master sales order
- If an order contains products from multiple suppliers, individual purchase orders for each will be generated
- Distributors can download, print, or send purchase orders to the vendor(s)

nvoice

- Invoices can be created from within the order
- Once an invoice is created, it will be available in the Quotes/Orders/Invoices
- Distributors can send orders to the Customer via the Client Portal
- Distributors can track payment information

Close Project