Quote Only SRA

💾 Wed, Jan 17, 2024 🛛 🖿 Create SRA

Quotes are usually handled differently throughout the system compared to Reactives. That being the case, it is possible to create SRAs that are only applicable to Quote Work Orders. The following steps describe how to create "Quote Only" SRAs:

1. Click the "Create New SRA" button to display the below screen. Here, enter the Name and Description, select "Quote Only" from the Special Type field and select whether the SRA is Active or not using the Status field.

Create SRA		
SRA Name	Quote Only	
SRA Description	Only Quotes can be associated	
Special Type	Quote Only	Ψ
Status	Active	Ŧ
		OK Cancel

Once all the above is done, click the "OK" button to create the SRA.

2. From this point on, follow the same creation process as a regularSRA.

Note: When creating a "Quote Only" SRA, it is not possible to create a Contract for it.

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=164