

From quotation to payment

Selling and customers

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From quotation to payment

The full sales process, from a price offer to delivery, invoice and payment.

Beginner · About 25 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Kuza** and **Enterprise** plans. It is not part of **Biashara**. Contact us if you want to upgrade.

Overview

A complete sale passes through up to five documents. Each is created from the previous one with the **Create** button, so details are carried forward and everything stays linked.

1. **Quotation**: your price offer.
2. **Sales Order**: the customer's confirmed order.
3. **Delivery Note**: the goods leaving your warehouse.
4. **Sales Invoice**: the bill.
5. **Payment Entry**: the money received.

You can skip steps. A cash sale can start at an invoice.

Prerequisites

A customer (or lead) and items. See Customers and Creating items.

Steps

1. Quotation

1. Search for **New Quotation**. Choose the **Quotation To**: *Customer* or *Lead*.
2. Add the items, quantities and rates. Set **Valid Till**.
3. Save and submit. Print or email it to the customer.

2. Sales Order

1. When the customer accepts, open the quotation and click **Create**, then **Sales Order**.
2. Set the **Delivery Date**. Confirm the items and save.
3. Submit. The order is now **To Deliver and Bill**.

3. Delivery Note

1. In the sales order, click **Create**, then **Delivery Note**.
2. Check the quantities and the **Source Warehouse**. Save and submit.
3. Stock is deducted. The customer signs the printed note on delivery.

4. Sales Invoice

1. In the delivery note, click **Create**, then **Sales Invoice**.
2. Check taxes and the due date. Save and submit. See Creating a sales invoice.
3. Leave **Update Stock** unticked, because the Delivery Note already reduced it.

5. Payment

1. In the invoice, click **Create**, then **Payment**, and submit it. See Recording payments.

Practical example

Baraka Supplies asks for a price on 120 bags of cement. The salesperson sends **Quotation** `SAL-QTN-...` at KES 850 a bag. Baraka accepts. She creates the **Sales Order**, then the **Delivery Note** (the storekeeper issues the cement), then the **Sales Invoice**. Baraka pays by M-Pesa, recorded with a **Payment Entry**.

Important notes

- The **Connections** tab on any document shows the whole chain.
- A partly delivered order can be invoiced in stages.
- Reports such as **Sales Analytics** and **Accounts Receivable** use this chain to answer *who owes what*.

Common mistakes

- Typing a new invoice instead of creating it from the order, which breaks the link.
- Delivering and invoicing with **Update Stock** on both, so stock reduces twice.

Troubleshooting

If the **Create** button does not show the next document, the document may still be in **Draft**. Submit it first.

Next steps

Read Sales returns.

Related documentation

- Creating a sales invoice
- Recording customer and supplier payments
- How the modules connect