Why can't I transfer my document to ORDER or INVOICE?

Cavallo Support - 2024-11-22 - FAQ

If your Quote document contains a non-inventory item, in order to transfer it you must disable the Non Inventory on Quote setting, which only allows non-inventory items on QUOTES:

1. Go to Modules > Settings
2. Filter to and select “Non Inventory on Quote”
3. Change the setting to False