

# Enquiry

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# Introduction

# Introduction

The Enquiry window is used to maintain the Enquiry Data about the particular Business partner with the product details.

Tab

Tab

# Enquiry

Home (58) Summary CreateQuotation(Enquiry) × CreateOrder(Enquiry) × Enquiry: 1000002 ×

Enquiry 3/3

Data requeried

Client Konnect Demo Organization Automobile Industry

Document Type Enquiry Consumer

Document No 1000002 Currency INR

Business Partner mUkund User/Contact

Campaign Sales Representative Gobinath

Opportunity Amount 50,000.00 Expected Close Date

Reason

Description

Comments

Document Status In Progress IsEnquiry

Document Action Processed

Reference

Order

## Critical Fields:

1. **Business Partner:** We can select existing/new customers here and this field is used to maintain customer
2. **Consumer :** Used to mention the consumer name
3. **Currency :** Used to mention the Currency Name in the document
4. **Expected Close Date :** Estimated Close date of the Enquiry
5. **Sales Representative :** This field is used for sales rep updating purposes, It will display from the employee master when the sales rep field is checked
6. **Opportunity Amount :** Used to Mention the Opportunity Amount

## **Critical & one-time setup fields:**

1. Organization : This field is used to select the organization
  2. Document Type : This Field is used to select the type of document that you are going to process
- 

## **Non-Critical Fields:**

1. Campaign: This field is used to select the campaign type
  2. Description : Used to mention the extra details about the Document.
  3. Comments : Used to maintain the comments about the document.
- 

## **Zoom Conditions:**

Tab

# Product

Home (58) Summary Enquiry: 1000001 x

Enquiry > Product

Data requiered

Client: Konnect Demo Organization: Automobile Industry

Line: 10 Enquiry: 1000001

Description:

Product: Lathe (HMS) Machine\_Lathe (HMS) Machine Attribute Set Instance:

Quantity: 10 UOM: Each

## Critical Fields :

1. Line : Used to mention the line number
2. Product : Used to mention the product name in the tab
3. Description : Used to Maintain the Extra details about the document
4. Quantity : Used to mention the Quantity Details
5. UOM : Used to maintain the Unit details about the Product
6. Attribute Set Instance : Used to maintain the Attribute details about the product.

# Activity

Home (58) Summary **Enquiry: 1000001** ✕

Enquiry > Activity ▾ 1/1

Data requested

Client	Konnect Demo	Organization	Automobile Industry
Description	tesyl		
Enquiry	1000001	Sub Activity	
Accounts		Business Partner	
Start Date	07/09/2023 5:36:38 PM	End Date	
Comments			
Sales Representative	Bharath	User/Contact	
Activity Type	Meeting	<input type="checkbox"/> Complete	
Sales Opportunity		<input type="checkbox"/> Follow Up	
Travel KM	0.0	Follow Up Date	
Contacts			
Remind Before(Minutes)	15		

## Critical Field :

1. Start Date : It is used to give the Activity start date
2. End Date : It is used to give the Activity end date
3. Sales Representative : It is used to select the sales rep for this activity
4. User Contact : Used to select the User contact from this Activity
5. Activity Type : Used to select the activity type like E-Mail, Meeting, Online Meeting, Phone Call, Task
6. Travel KM : Used to maintain Travel kilometer
7. Follow Up : This Check box is used to Mention if the follow up is required or not
8. Complete : This check box is used to maintain the activity is completed or not



9. Follow Up Date : Used to mention the follow up date
10. Remind Before : Used to mention the Remind Before time
11. Sub Activity : Used to mention the sub activity type from the master.
12. Complete : This Check box is used to mention that the activity is completed or not.

## **Non-Critical Field :**

1. Description : Used to give the extra details about the activity
2. Comments : Used to maintain any comments about the Activity

Tab

# Custom Fields

Order > Custom Fields ▼

Inserted

Client	XYZ Foundation	Organization	HQ
Sequence	1	Order	80037_22/04/2019
Custom Columns			
Value Column			

## Critical Fields:

1. Sequence: Method of ordering records (lowest number comes first)
2. Custom columns: Additional field used for reporting purposes
3. Value : It is used to give the value of the custom column
4. Description : Used to maintain the extra details about the Custom column.

## Critical & one-time setup fields:

## Non-Critical Fields:

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**Zoom conditions:**

# Document Actions

# Validations

## **Save :**

1.System will check the all mandatory fields

## **Delete :**

1.System will delete the Document and its history details

## **Document action prepare :**

1.System will check the period details and master data's checking

## **Document action complete :**

1.Once document action is complete ,all fields are update in read only

## **Document action void/reverse correct actual :**

1.Void- system will reverse all the transaction data's and change the document status to Void

## **Document action close :**

1.system will check whether all the activity for the document is completed and change the Document status to close.

# Process

# Process

The screenshot shows the SAP Enquiry form with the following fields:

- Client:** Konnect Demo
- Organization:** Automobile Industry
- Document Type:** Enquiry
- Consumer:** (dropdown)
- Document No:** 1000002
- Currency:** INR
- Business Partner:** m...
- Campaign:** (dropdown)
- Opportunity Amount:** (input)
- Reason:** (dropdown)
- Description:** (input)
- Comments:** (input)
- Document Status:** In...

The **CreateSO-Enquiry** dialog box is open, asking "Do you want to start the Process?". It contains the following fields:

- Business Partner:** (dropdown)
- Document Type:** (dropdown)
- Price List:** (dropdown)
- ☐ Run as Job
- Saved Parameters:** (dropdown)

At the bottom of the dialog are **OK** and **Cancel** buttons. The background form also has a **Document Action** button and a **Processed** checkbox.

## Create SO Enquiry :

1. Business Partner : Used to select the Business partner name for sales order
2. Document Type : Used to select the Sales Order document type
3. Price List : Used to select the price list for the sales order.

## Process Use :

This is used to create the sales order from the Enquiry Document.

# Videos