

Enquiry

- Introduction
 - Introduction
- Tab
 - Enquiry
 - Product
 - Activity
 - Custom Fields
- Document Actions
 - Validations
- Process
 - Process
- Videos

Introduction

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) x CreateOrder(Enquiry) x Enquiry: 1000002 x

Enquiry 3/3

Data requested

Client: Konnect Demo Organization: Automobile Industry

Document Type: Enquiry Consumer: [Dropdown]

Document No: 1000002 Currency: INR

Business Partner: mUkund User/Contact: [Dropdown]

Campaign: [Dropdown] Sales Representative: Gobinath

Opportunity Amount: 50,000.00 Expected Close Date: [Calendar]

Reason: [Text Area]

Description: [Text Area]

Comments: [Text Area]

Document Status: In Progress IsEnquiry

Processed

Document Action

Reference

Order: [Text Field]

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 requeried

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.

Tab

Activity

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

Enquiry > Activity 1/1

Data requested

Client: Organization:

Description:

Enquiry: Sub Activity:

Accounts: Business Partner:

Start Date: End Date:

Comments:

Sales Representative: User/Contact:

Activity Type: Complete

Sales Opportunity: Follow Up

Travel KM: Follow Up Date:

Contacts:

Remind Before(Minutes):

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:

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 :

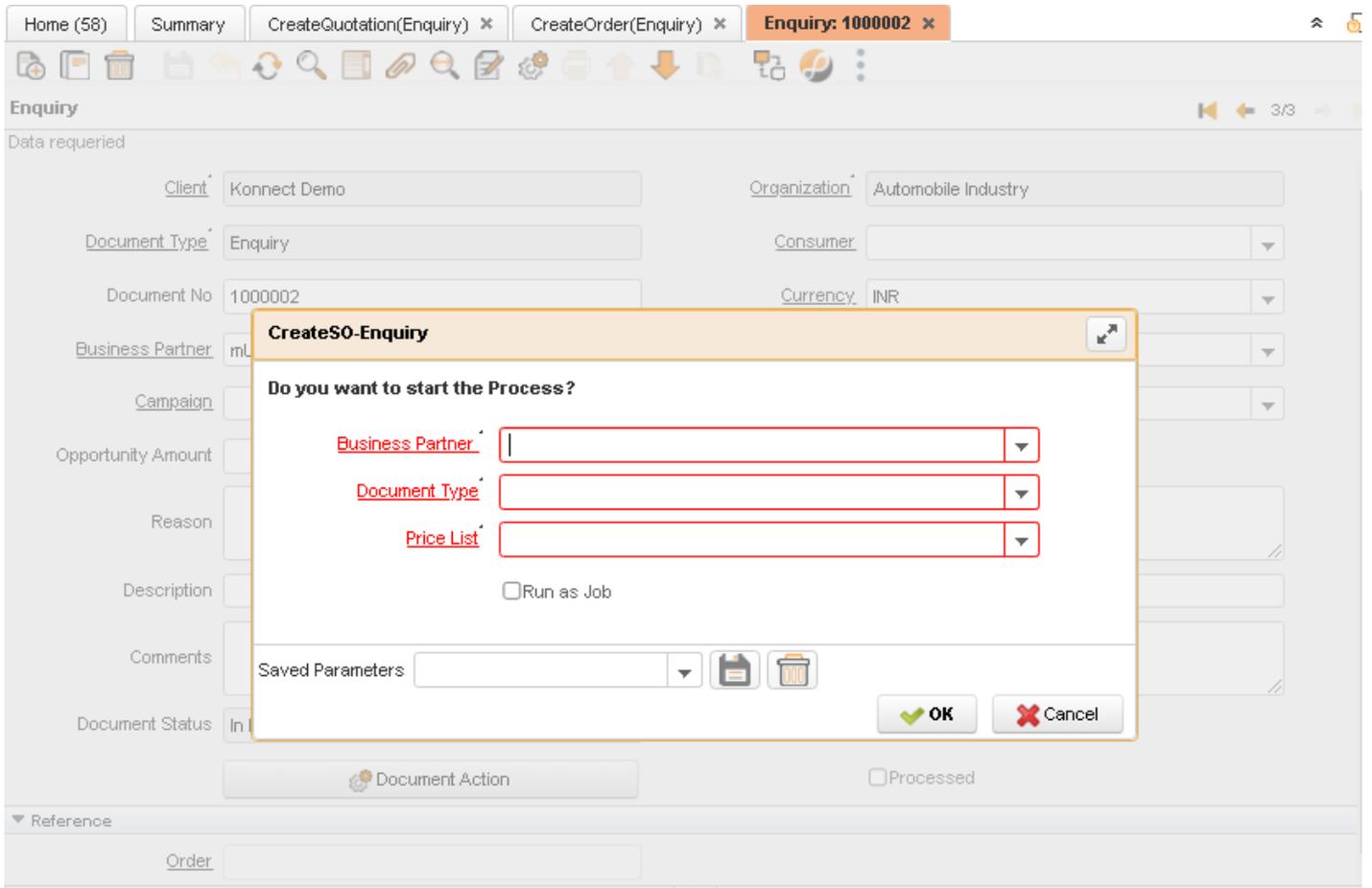
1.Void- system will reverse all the transaction data's and change the document status to Void

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



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