

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
-

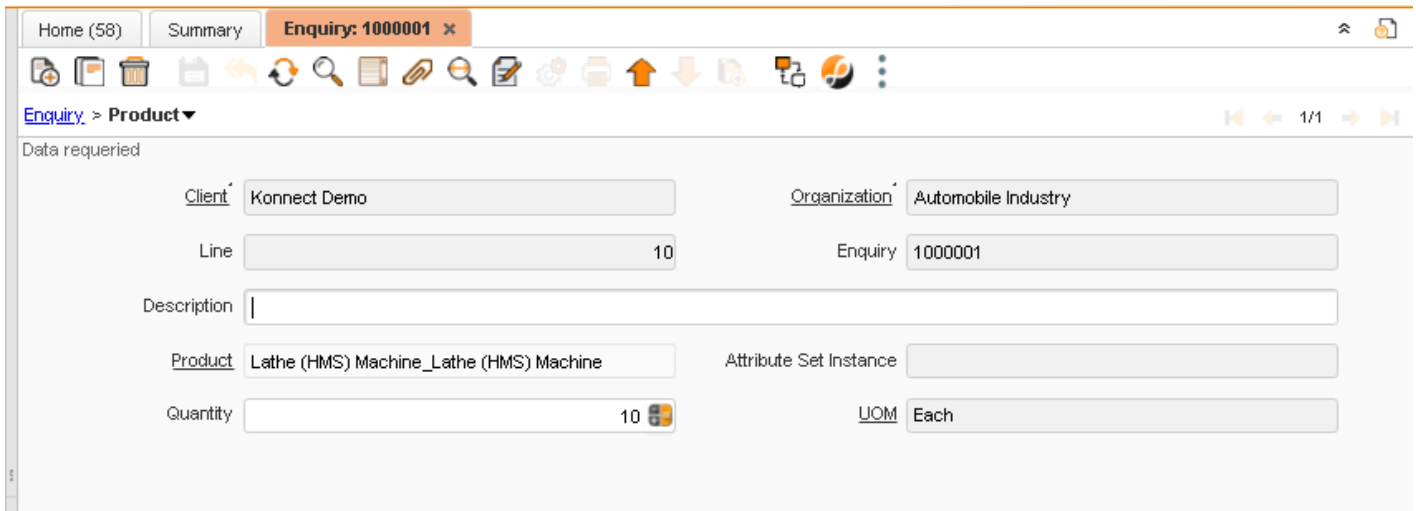
Non-Critical Fields:

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 requested

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** x

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:

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:** (input)
- 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