

Form and process

- Quote convert(Manual)
- Quote convert
- CreateQuotation(Enquiry)

Quote convert(Manual)

| Organization | Document Type | Document No | Business Partne | Date Ordered | Total Lines |
|------------------------|---------------|-------------|-----------------|--------------|-------------|
| Manufacturing Discrete | Quotation | 10126 | Tech equipment | 28/08/2023 | 33,000.00 |
| Manufacturing Discrete | Quotation | 10127 | Tech equipment | 12/09/2023 | 5.00 |

Parameters :

- 1) Warehouse : It is used to select Warehouse name which is mentioned in Quotation.
- 2) Business partner : It is used to select customer name which is mentioned in Quotation.
- 3) Document type : It is used to select document type whether quote is converting into sales order or job order based on document type.
- 4) Date ordered : It is used to mention order date.
- 5) Close Quotation : It is used complete the quotation document.

Process use :

By Using this form we can able to convert Quotation into sales order.

Quote convert

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Convert open Proposal or Quotation to Order
You can convert a Proposal or Quotation to any other Order document type. You would use this process, if you want to maintain/keep the Proposal or Quotation. The document status needs to be In Process.

Order:

Document Type:

Business Partner:

Document Date: 12/09/2023

Close Document

Run as Job

Saved Parameters:

OK Cancel

Parameters :

- 1) Order : It is used mention Quotation document no which is in Inprocess stage.
- 2) Document type : It is used to select document type,whether quote is converting into sales order or customer po.
- 3) Business partner : It is used to mention the customer details.
- 4) Document date : It is used mention Quote convert document date
- 5) Close document : It can be selected if Quotation document needs to be completed.

Process use :

By using this process we can able to convert Quotation into sales order & Customer PO.

CreateQuotation(Enquiry)

Home (2109) CreateQuotation(Enquiry) ✕

Do you want to start the Process?

Enquiry

Business Partner

Document Type

Price List

Run as Job

Saved Parameters

OK Cancel

Parameters :-

1. Enquiry : Document of enquiry for which the user demands a quotation.
2. Business Partner : We can select existing/new customers here and this field is used to maintain customer
3. Document type : This Field is used to select the type of document that you are going to process
4. Price list : The price list will be selected in the product master once we select the product price list will display automatically and the user can also select manually

Process Use :

This process is used To create Quotation from Enquiry.