

Form and process

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

Quote convert(Manual)

Organization	Document Type	Document No	Business Partner	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

Home (114) Summary **Quote convert** x

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) ✕

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Do you want to start the Process?

Enquiry

🔍

Business Partner

👤

Document Type

▼

Price List

▼

☐ Run as Job

Saved Parameters

▼

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🗑️

✔ 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.