

# Quotation

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# Introduction

# Introduction

## Overview

A sales quotation or business sale quote is a document that allows a potential customer to view the cost involved in purchasing specific services or products.

It is generally used by sellers to begin a business transaction.

## Business Case

A customer submits a purchase requisition for the product to Fabrication Industries.

Then the quotation will be made by the marketing team to give a short view of cost involved in purchasing specific services or products.

For internal document reference, it is helpful.

# Tabs

# Quotation Header

Home (176) Quotation: FAB/23-24/10000 x

Quotation

Data requested

Client: Sandbox Organization: Manufacturing Discrete

Document No: FAB/23-24/10000 Order Reference:

Description:

Target Document Type: Quotation Validity:

Quotation Date: 10/10/2023 Date Promised: 10/10/2023

Business Partner: Demo Connect Invoice Partner: 1000093-Demo Connect

Partner Location: Coimbatore Invoice Location: Coimbatore

User/Contact: Connect User Invoice Contact: Connect User

Area:

Order Source: Quote Status:

Sales Representative: ~Selvaraj~ Order Source Category:

Order Source Type: External Agency:

Order Source Activity:

☐ Quote Loss

No Lines - 0.00 - Total: 0.00 INR = 0.00

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Home (176) Quotation: FAB/23-24/10000 x

Quotation

Data requested

No Lines - 0.00 - Total: 0.00 INR = 0.00

Delivery:

Delivery Rule: Availability Delivery Terms:

Warehouse: Consumable Stores

Delivery Via: Pickup

Freight Cost Rule: Included in Price

Insurance Cost Rule: Included in Price

Packing and Forwarding Cost Rule: Included in Price

Invoicing:

Price List: Sales Price List Currency: INR

Payment Rule: On Credit Payment Term: Immediate

Promotion Code:

Reference:

Project: Activity:

Sales Opportunity:

Campaign: Cash Plan Line:

Status:

Total Lines: 0 Grand Total: 0.00

Document Status: Drafted Document Type: \*\* New \*\*

## Critical Fields:

1. Quotation Date: Date on which Quotation is Shared with Customer.
2. Date Promised: Estimated delivery date of the product to the customer.
3. Business Partner: We can select existing/new customers here and this field is used to maintain the Vendor.

4. Partner Location: This field is updated automatically, based on business partner selection, and also updates location manually.
5. Delivery Rule: This field helps to select the timing of the delivery.
- 5.1. After Receipt: It defines the order to be paid after receipt.
- 5.2. Availability: This will ship goods as they come into stock, regardless of whether there will be outstanding quantities for the order or not.
- 5.3. Complete Line: This will generate shipments whenever stock to fulfill any individual order line is available.
- 5.4. Complete Order: This will create a shipment when the stock to fulfill the entire order is available.
- 5.5. Force: This will cause a shipment to be generated for the full quantities specified in the order, regardless of whether they are in stock or not.
- 5.6. Manual: This will prevent shipments from being automatically generated.
6. Delivery Terms: To update the Delivery Terms (Immediately, According to customer scope, Within 45 days etc.).
7. Warehouse: Product storage purpose, Select a warehouse where the final product is stored.
8. Delivery Via:
- 8.1. Delivery
- 8.2. Pickup
- 8.3. Shipper
9. Freight Cost Rule: Method for charging flight
- 9.1. Calculated: We can calculate the freight cost.
- 9.2. Fix price: Fixed the freight cost.
- 9.3. Included in Price: Already included in the product price list.
10. 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 also select manually.
11. Sales Representative: This field is used for sales rep updating purposes, the regard will display from the employee master when the sales rep field is checked.
12. Payment Rule: This field used to select the payment type.
- 12.1 Cash: After receiving the invoice, the customer pays the invoice amount through cash only.
- 12.2 Check: After receiving the invoice, the customer pays the invoice amount through a check.
- 12.3 Credit Card: Payment amount paid to the vendor to use a Credit Card.

12.4 Direct Debit: Payment amount paid to direct vendor account number.

12.5 IMPS: instant interbank electronic fund transfer.

12.6 Mixed POS Payment

12.7 NEFT

12.8 On Credit

12.9 RTGS: Payment amount paid to RTGS.

13. Order Source : It is used to select the Source Details for this Document from the Order Source Master.

14. Order Source Type : It is a master window and it is used to maintain the Order Source type Based on the Order Source

15. Order Source Category : It is a master window which is used to select the data from the master and it is related with the Order source type.

16. Order Source Activity : Used to maintain the activity and It is a master data related with the Order Order Source Category.

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

1. Organization: This field is used to select the organization

2. Target Document Type- This Field is used to select the type of document that you are going to process

## **Non-Critical Fields:**

1. Order Reference: Notes, Document, and Important Information for this Quotation.

2. Description: Used to describe specifics about a Quotation document or any other note, information, or data, for example.

3. Validity: Notes and specifics about validity of quotation.

4. Invoice Partner: It is an master same as vendor , if we brought item from one vendor and then we want to send invoice for another vendor for this order means we want to select this invoice vendor, otherwise both are same.

5. Invoice Location: It is an master same as vendor location , if we brought item from one vendor location and then we want to send invoice for another vendor location for this order means we want to select this invoice vendor, otherwise both are same.
6. User/Contact: He is the contact person in that particular Customer side.
7. Invoice Contact: contact person for that invoice copy from invoice Customer side.
8. Area: It is a Master data
9. Quote Status:
  - 9.1 Cold
  - 9.2 Converted
  - 9.3 Expired
  - 9.4 Follow up
  - 9.5 Hot
  - 9.6 New
  - 9.6 Recycled
  - 9.7 Warm
  - 9.8 Working
10. Order Source: Source of order. it is a master data.
11. Order Source Category: This field is for Categories of order source. it is a master data.
12. Order Source Type: According to Order source type is defined. it is a master data.
13. Order Source Activity: According to order source Order source Activity is defined. it is a master data.
14. Quote Loss: This is check box in case of quotation loss.
15. Reason: This is field describes Quotation loss reason.
16. Terms and condition: This field is used for our internal terms and conditions updating purpose (Payment terms, other Terms)
17. Insurance Cost Rule:
  - 17.1.Calculated: We can calculate the freight cost.
  - 17.2.Fix price: Fixed the freight cost.
  - 17.3.Included in Price: Already included in the product price list.
18. Packing and Forwarding Cost Rule:
  - 18.1.Calculated: We can calculate the freight cost.
  - 18.2.Fix price: Fixed the freight cost.
  - 18.3.Included in Price: Already included in the product price list.
19. Discount Printed Check box: To print Discount Details on Report.
20. Promotion Code: To Promote product through the different ways of marketing is any promotion



code is used.

21. Project: If this order is processed against a project user can tag the project for tracking.

22. Activity: Description of Activities related to project. it is a Master data.

23. Sales Opportunity: This field serves as a sales opportunity reference for the user who wants to create a quote. User can refer straight to Sales Opportunity after selecting one-time setup field to have information automatically fetched as necessary.

24. Campaign: This field is used to select the campaign type.

25. Cash Plan Line: It is a master data that allows the user to create cash plans for quotations in accordance with business partners and products.

26. External Agency: It is used to select the existing business partner name.

## **Zoom conditions:**





















1. Sale order : if sale order is created against the sales quotation it will be displayed here.

## **Customization:**

# Quotation Line

Home (259)

Quotation: 1000957 ✕

Quotation > Quotation Line▼

Copy Custom BOM Picker

1 Line - 375.00 - Total: 375.00 INR = 375.00

Client

Sandbox

Organization

Manufacturing Discrete

Date Quoted

07/01/2025

Date Promised

07/01/2025

Line

1

Product

Component-2-Component-2

Attribute Set Instance

Resource Assignment

Description

PrintNotes

Quantities

Custom Fields(Line)

Components

3 Records

	Product	BOM Product	Quantity to Order	Printed	UOM	Description
<input checked="" type="checkbox"/>	1000012_Rough base stone	Component-4-Component-4	20	<input checked="" type="checkbox"/>	Each	
<input type="checkbox"/>		1000015-base stone 250...	10	<input type="checkbox"/>	Each	
<input type="checkbox"/>		1000012-Rough base stone	10	<input type="checkbox"/>	NUMBERS	

## Critical Fields

1. Product: : To select the product that will be quoted.
2. Charge: Additional document charge to add this field.
3. Quantity: Quantity which needs to be quoted.
4. UOM: Unit Of Measurement.
5. Price: This field is for Price of product. it will automatically fetch details according to price list of product.
6. List price: This field is for List price of product.it will automatically fetch details according to price list of product.
7. Unit Price: This field is for unit price of product. it will automatically fetch details according to price list of product.
8. Tax: This field is used to select tax either Interstate or intrastate and we can also change the tax.

## **Non-Critical Fields**

1. Description: Used to describe specifics about a Quotation line or any other note, information, or data, for example.
2. Discount %: If any discount for the product to the specifics customer to be used.
3. Project: If this order is processed against a project user can tag the project for tracking.
4. Campaign: It is used to select the campaign type.
5. Activity: This Field is for Activities according to project. It is a Master data.

## **Components**

BOM picker process option is used to display subassemblies & raw materials in the components tab which will help sales person to show details in the Quotation format.

Tabs

# Order Tax

Home (52)SummaryQuotation: 10042 ✕

Quotation > Order Tax▼1/1

1 Line - 750.00 - Total: 750.00 INR = 750.00

ClientKonnect Demo

Order10042\_14/11/2022

TaxNo Tax

Tax Amount0.00

☐ Price includes Tax

Organizationkonnect demo

Tax Provider

Tax base Amount750.00

Once the document is completed order tax tab automatically update

# Payment Schedule

Home (52) Summary \*Quotation: 10042 ✕

Quotation > Payment Schedule ▼

Inserted 1 Line - 750.00 - Total: 750.00 INR = 750.00

Client: Konnect Demo Organization: konnect demo

Order: 10042\_14/11/2022 Payment Schedule: ▼

Description:

Due Date:  Amount due: 0.00

Discount Date:  Discount Amount: 0.00

Validate ☐ Valid

## Critical Fields

1. Payment Schedule : To update the schedule details
2. Due Date : Date when the payment is due
3. Discount Date : Once the discount date is exceeded system not consider the discount amount
4. Amount due: Amount of the payment due
5. Discount Amount : To update the discount amount details

## Non-Critical Fields

1. Description
2. Discount Amount

## Validation

System check total value and payment schedule value

Tabs

# Custom Fields

# Document Actions



# Validations

## Save

1. System will check all mandatory fields
2. In the order line, the system will pick the price and tax from the master.
3. If a Custom line is added in the master, it will copy to the customs line under the order line.
4. Payment Schedule will explode as per the payment terms selected in order(Header).

## Delete

1. System will delete the order and its history details
2. If the product is required to delete in the order line and it is in draft status, then you can delete the record. If the Document status is in progress, you should change the quantity to zero and prepare the document. then you can delete the record.
3. If you want to delete the whole record, first need to delete the activity against the document number and delete the header.

# Actions

## **Document action prepare**

1. System will check the period details and master data checking
2. If a payment schedule is not created, the system will automatically create a payment schedule based on the payment term selected.

## **Document action complete**

1. System will set the status as complete for the document and keep the order ready for processing.
2. Once document action is complete, all fields are updated in read-only

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

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

## **Document action close**

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

# Process

# Quotation Process

Home (53) | Summary | Quote Convert(Manual) | Sales Order: 50292 | Quotation: 10111 | Quotation: 10103

Quotation

Data requested

Client: Konnect Demo

Document No: 10103

Description: g

Target Document Type: Quotation

Quotation Date: 23/06/2023

Business Partner: Tech equipment test

Partner Location: Coimbatore

User/Contact: Tech equipment test

Organization: Food Industry

Order Reference

Invoice Partner: 10000056-Tech equipment test

Invoice Location: Coimbatore

Invoice Contact: Tech equipment test

Validity

Process

Copy Lines

Create lines from

Digital Signature

Product\_Search

AddDefaultItems

Generate Discount

Document Action

Quotation Line

Custom Fields(Line) | Order Tax | Payment Schedule | Custom Fields | All Activities | Quote Activity

0 Records

Line	Product	Charge	Date Promised	Attribute Set Instance	Resource Assignment	Description	Quantity
No Records found							

## 1) Copy Lines

Copy lines process will help you to copy the sales order lines from any sales order.

## 2) Product Search

In the Quotation Header, the Product Search option in the Process button helps to search the product by a combination of Attributes that we already configured in the Product search configuration window.

## 3) AddDefaultItems

The charges will add automatically which are already configured in the master.

#### **4) Generate Discount**

This will help you to add discounts for all products under the Quotation line Tab.

# Video

Video

# Quotation Video

# Report

Sr.no	Report Name	Report purpose
1	Open Quotation Summary	This report shows Open Quotation and details.
2	Quotation vs Order summary	This report Shows Quotation wise Sales order and Summary.
3	Quotation vs Order	This report Shows Quotation wise Sales order and Summary.
4	Quotation Amendment	This report shows Amended Quotations.



# Preceding and Succeeding Window

Preceding and Succeeding Window

# Quotation Connected Window

## **Preceding Window**

Sales opportunity :- [Sales Opportunity](#)

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## **Succeeding Window**

Quote Convert

Sales Order :- [Sales Order](#)

Quote Convert (Manual)

# Form and process

# 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) x

⬆️ 📄

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.