

Quotation Header

The image shows two screenshots of the SAP Quotation Header form. The top screenshot displays the main header fields, and the bottom screenshot shows the expanded 'Delivery' and 'Invoicing' sections.

Top Screenshot Fields:

- Client: Sandbox
- Organization: Manufacturing Discrete
- Document No: FAB/23-24/10000
- Order Reference: [Empty]
- Description: [Empty]
- Target Document Type: Quotation
- Validity: [Empty]
- Quotation Date: 10/10/2023
- Date Promised: 10/10/2023
- Business Partner: Demo Konnect
- Invoice Partner: 1000093-Demo Konnect
- Partner Location: Coimbatore
- Invoice Location: Coimbatore
- User/Contact: Konnect User
- Invoice Contact: Konnect User
- Area: [Empty]
- Quote Status: [Empty]
- Order Source: [Empty]
- Order Source Category: [Empty]
- Sales Representative: ~Selvaraj~
- External Agency: [Empty]
- Order Source Type: [Empty]
- Order Source Activity: [Empty]
- Quote Loss

Bottom Screenshot Fields:

- Delivery:**
 - Delivery Rule: Availability
 - Delivery Terms: [Empty]
 - Warehouse: Consumable Stores
 - Delivery Method: 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
 - Discount Printed
 - Payment Rule: On Credit
 - Payment Term: Immediate
 - Promotion Code: [Empty]
- References:**
 - Project: [Empty]
 - Activity: [Empty]
 - Sales Opportunity: [Empty]
 - Cash Plan Line: [Empty]
 - Competition: [Empty]
- 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:

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