

Quotation Line

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The screenshot shows the 'Amounts' and 'Reference' sections of a Quotation Line form. The 'Amounts' section includes fields for Price, List Price, Unit Price, Discount %, Tax, and Line Amount (0.00). The 'Reference' section includes fields for Project, Campaign, and Activity.

The screenshot shows the main Quotation Line form with the following fields: 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, and PrintNotes. A 'Copy Custom BOM Picker' button is visible above the Product field.

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.

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