

Tabs

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- Order tax
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Quotation Header

Quotation [1/13]

1 Line - 150.00 - Total: 177.00 INR = 177.00

Client	Connect Demo	Organization	Food Industry
Document No	10054	Order Reference	
Description			
Target Document Type	Quotation	Validity	
Quotation Date	23/02/2023	Date Promised	23/02/2023
Business Partner	John	Invoice Partner	1000023-John
Partner Location	Chennai	Invoice Location	Chennai
User/Contact	John	Invoice Contact	John
Area		Quote Status	
Order Source		<input type="checkbox"/> Quote Loss	
Terms and condition			

▼ Delivery

Delivery Rule	Availability	Delivery Terms	
Warehouse	Food Warehouse		

▼ Delivery

Delivery Rule	Availability	Delivery Terms	
Warehouse	Food Warehouse		
Delivery Via	Delivery		
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
Sales Representative	Selvaraj	<input type="checkbox"/> Discount Printed	
Payment Rule	On Credit	Payment Term	Immediate
Promotion Code			

▼ Reference

Project		Cash Plan Line	
Sales Opportunity			
Campaign			

▼ Status

Total Lines	150	Grand Total	177.00
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Detail record

The screenshot shows a software interface with a 'Status' section. It includes fields for 'Total Lines' (150) and 'Grand Total' (177.00). The 'Document Status' is set to 'Drafted', and 'Document Type' is '** New **'. There are several checkboxes: 'Pay Schedule valid', 'Approved', 'Approved Level 1', and 'Approved Level 2'. A 'Document Action' button is also visible.

Critical Fields

- 1) Business Partner: We can select existing/new customer here and this field used to maintain customer who sale the Quotation
- 2.Partner location: This field is update automatically ,based on business partner selection, and also update location manually
- 3.Warehouse: Product storage purpose ,Select a warehouse were the final product are stored.
- 4.Date promised: Estimated delivery date of the product to the customer
- 5.Price list: Price list will be selected in product master once we select the product price list will display automatically and user also select manually.
- 6.Sales Representative :This field used for sales rep updating purpose ,the regard will display from employee master when sales rep field is checked
- 7.Terms and condition: This field used for our internal terms and condition updating purpose (Payment terms etc)
- 8.Delivery Terms : To update the Delivery Terms (By Air, By courier,etc)
 - 9.1) After Receipt: It requires the order to be paid for before the shipment will be created.
 - 9.2) Availability: This will ship goods as they come into stock, regardless of whether there will be outstanding quantities for the order or not.
 - 9.3) Complete Line: This will generate shipments whenever stock to fulfil any individual order line is available.

9.4) Complete Order: This will create a shipment when the stock to fulfil the entire order is available.

9.5) 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.

9.6) Manual: This will prevent shipments from being automatically generated.

10) Delivery Via: indicates how the products should be delivered

10.1) Pickup: After Product is ready to ship customer will take the product by their own vehicle.

10.2) Delivery: Delivery done by the vendor itself to the customer.

10.3) Shipper: The Shipper indicates the method of delivering product via ship, aeroplane..etc.

11.Freight Cost Rule :Method for charging flight

11.1 Calculated : We can calculated the freight cost

11.2 Fix price : Fixed the freight cost

11.3 Included in Price : Already included in the product price list

12.Insurance Cost Rule :Method for charging insurance

12.1 Calculated : We can calculate the insurance cost

12.2 Fix price : Fixed the insurance cost

12.3 Included in Price : Already included in the product price list

13.Packing and Forwarding Cost Rule :Method for charging Packing and Forwarding

13.1 Calculated : We can calculate the Packing and Forwarding cost

13.2 Fix price : Fixed the Packing and Forwarding Cost

13.3 included in price :Already included in the product price list

14.Payment Rule:This field used to select the payment type

14.1 Cash: After receiving the invoice, customer pay the invoice amount through cash only

14.2 Check: After receiving the invoice, customer pay the invoice amount through check

14.3 Credit Card:Payment amount pay to vendor to use Credit Card

14.4 Direct Debit:Payment amount pay to direct vendor account number

14.5 Mixed POS Payment

14.6 NEFT

14.7 On Credit

14.8 RTGS: Payment amount pay to RTGS

15.Payment term:The terms of payment(immediate ,30 days,etc)

Critical & onetime 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 the document that you are going to process

Non-Critical Fields

1) Project- If this order is processed against a project user can tag the project for tracking.

2. campaign:

Zoom condition's

1.Shipment customer

2.invoice (customer)

3.invoice payment schedule

4 MRP

5.Shipments package plan

Customization

Quotation line

Quotation > Quotation Line

Data requested

Client: Konnect Demo Organization: Food Industry

Date Quoted: 23/02/2023 Date Promised: 23/02/2023

Line: 10

Product: Fenugreek Seeds Packed-Fenugreek Seeds

Attribute Set Instance: Resource Assignment:

Description:

PrintNotes:

Quantities

Quantity: 1 UOM: Kgs

Amounts

Price: 150.00 List Price: 0.00

Unit Price: 150.00 Discount %: 10.0

Tax: Intrastate 18% Line Amount: 150.00

Reference

Critical Fields

- 1.Product : To select the product type is item, you can select the multiple product in this line item
- 2.Quantity : Quantity which needs to be quoted
- 3.UOM: The record will populate from product and we can change the UOM manually, if uom conversion for the product.
- 4.Tax : This field is used to select tax either Interstate or intrastate and we can also change the tax.
- 5.Charge: additional document charge to add this field
- 6.Discount: If any discount for the product to the specif customer to be used

Critical & onetime setup fields

Non-Critical Fields

1) Project- If this order is processed against a project user can tag the project for tracking.

2. campaign:

Serial number/Lot number (ASI)

In this Field we can set Attribute instance for this product & we not generate serial number in Quotation.

Zoom condition's

Validation

Order tax

Quotation > Order Tax 1/1

1 Line - 150.00 - Total: 177.00 INR = 177.00

Client*	Konnect Demo	Organization*	Food Industry
Order*	10054_23/02/2023	Tax Provider*	
Tax*	Intrastate 18%	Tax base Amount*	150.00
Tax Amount*	27.00		

Price includes Tax

Once the document is complete order tax tab automatically update

Note: This sub tab is used for only viewing purpose

Payment schedule

Quotation > Payment Schedule

Inserted 1 Line - 150.00 - Total: 177.00 INR = 177.00

Client	Konnect Demo	Organization	Food Industry
Order	10054_23/02/2023	Payment Schedule	
Description			
Due Date	<input type="text"/>	Amount due	0.00
Discount Date	<input type="text"/>	Discount Amount	0.00
<input type="button" value="Validate"/>		<input type="checkbox"/> Valid	

Critical Fields

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

Critical & onetime setup fields

Non-Critical Fields

Zoom condition's

Validation

System check total value and payment schedule value

Custom fields



Quotation > Custom Fields

Inserted

Sequence

Custom Columns

Value Column

Critical Fields :

- 1.Sequence : Method of ordering records (lowest number come first)
- 2.Custom columns: Additional field used for reporting purpose

Critical & onetime setup fields :

Non-Critical Fields :

Zoom condition's :

Validation :