

Quotation

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Introduction

Introduction

Introduction

Overview

A Quote/Estimate is an offer to provide Estimate for any goods / product which we sell in our company

Business Case

A Fabrication Industries receives a Purchase order from customer for new development component or exiting the product(Price navigation purpose) . The Marketing team will prepare the Quotation

Tabs

Quotation Header

Quotation [1/13]

1 Line - 150.00 - Total: 177.00 INR = 177.00

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

▼ Delivery

Delivery Rule: <input type="text" value="Availability"/>	Delivery Terms: <input type="text"/>
Warehouse: <input type="text" value="Food Warehouse"/>	

▼ Delivery

Delivery Rule: <input type="text" value="Availability"/>	Delivery Terms: <input type="text"/>
Warehouse: <input type="text" value="Food Warehouse"/>	
Delivery Via: <input type="text" value="Delivery"/>	
Freight Cost Rule: <input type="text" value="Included in Price"/>	
Insurance Cost Rule: <input type="text" value="Included in Price"/>	
Packing and Forwarding Cost Rule: <input type="text" value="Included in Price"/>	

▼ Invoicing

Price List: <input type="text" value="Sales Price List"/>	Currency: <input type="text" value="INR"/>
Sales Representative: <input type="text" value="Selvaraj"/>	<input type="checkbox"/> Discount Printed
Payment Rule: <input type="text" value="On Credit"/>	Payment Term: <input type="text" value="Immediate"/>
Promotion Code: <input type="text"/>	

▼ Reference

Project: <input type="text"/>	
Sales Opportunity: <input type="text"/>	
Campaign: <input type="text"/>	Cash Plan Line: <input type="text"/>

▼ Status

Total Lines: <input type="text" value="150"/>	Grand Total: <input type="text" value="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 calculate 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

Tabs

Quotation line

The screenshot displays a 'Quotation Line' form with the following fields and values:

- Client:** Kconnect 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:** (empty)
- Resource Assignment:** (empty)
- Description:** (empty)
- PrintNotes:** (empty)

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: (empty)

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

Tabs

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

Tabs

Payment schedule

Quotation > Payment Schedule▼ +*/1

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



The screenshot shows a configuration window titled "Quotation > Custom Fields" with a sub-header "Inserted". It contains three input fields: "Sequence" with a value of "10" and a small icon; "Custom Columns" with a dropdown arrow; and "Value Column" with a large empty text area.

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 :

Document Actions

Validation

Save

1. System will check all the mandatory fields.

Delete

1. System will delete the order and its historical details.

Document action prepare

1. System will check the period details and master data verification.
2. If the payment schedule is not created, the system will automatically create a payment schedule based on the payment.
3. when particular document status is in progress, it will generate automatically (**sales order**) through the quote convert process.

Document action complete

1. System will complete the document and keep the order ready for processing in quotation
2. Once document action is complete, all fields are update in read only

Document action void/reverse correct actual

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

Document action close

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

Actions

Verify:

Not applicable

Create lines from:

Not applicable

Copy from/lines:

This button will help you to copy the order lines from another sales order line. We need to mention the order number to copy it.

<custom actions>:

Not applicable

Process

Introduction

1.This process used for from quotation to sales order automatic conversion purpose

Business Example

Video