

Quotation

The screenshot shows a web-based Quotation form. At the top, there's a header bar with 'Home (105866)' and 'Sales Rep info: 10077 Selv...'. Below the header, the form is divided into several sections. The main section contains fields for Client (XYZ Foundation), Organization (HQ), Document No (10077), Order Reference, Description, Target Document Type (Quotation), Validity, Date Ordered (21/09/2020), Date Promised (21/09/2020), Business Partner (Ars india pvt ltd), Invoice Partner (1000060-Ars india pvt ltd), Partner Location (TamilNadu), Invoice Location (TamilNadu), User/Contact (selvaraj), Invoice Contact (selvaraj), Order Source, and Terms and condition. There's a 'Quote Loss' checkbox. Below the main section, there's a 'Delivery' section with 'Delivery Rule' (Availability) and 'Delivery Terms' (Immediate). At the bottom, there's a 'Quotation Line' section with a table header: Client, Organization, Order, Business Partner, Partner Location, Date Ordered, Date Promised, Line No, Warehouse, Product, Charge, Description. The table currently shows 0 Records.

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

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