Sales Quote

1. Click on this button, to create Sales Quote.

Create Sales Quote

1. Sales quote number is auto displayed.
2. Select customer. On selecting customer, bill-to and ship-to address, outstanding amount (current,1-30,30-60,60-90 and 90-180 days), total outstanding and credit terms are auto generated.
3. Enter PO number and date.
4. Select project quote and channel.
5. Enter PNF.
6. Select tax environment.
7. Enter inward and outward freight.
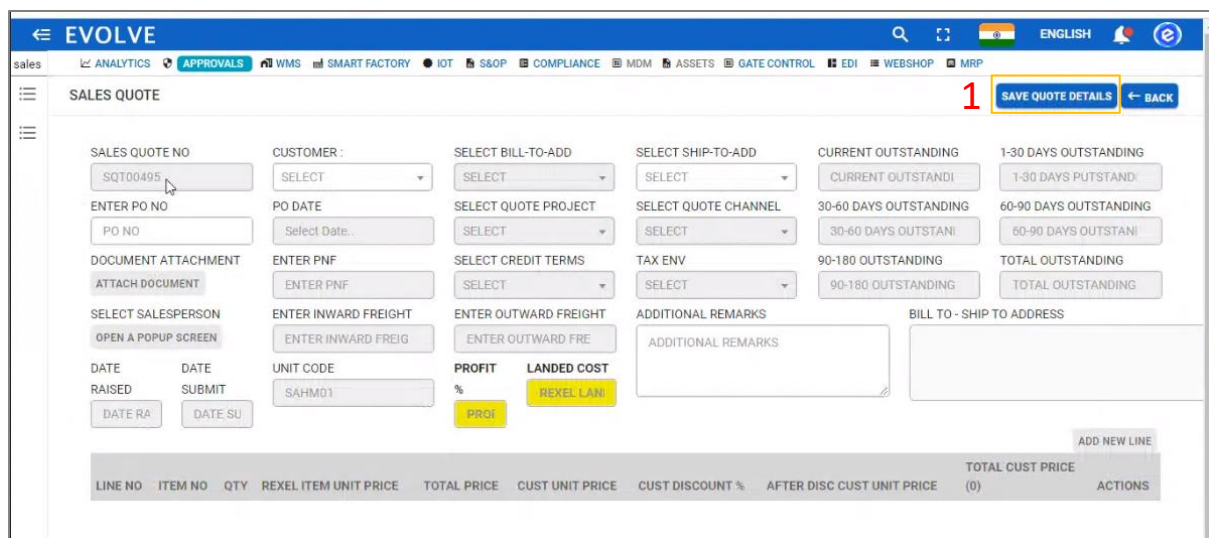8. Click on this button, to add new line.

Add Line

1. Select item. On selecting item, its description, UOM, MRP is auto generated.
2. Select agreement, agreement discount is auto generated.
3. Enter unit price and quantity. Total price is auto displayed.
4. Enter customer unit price and discount. Discounted price is auto generated.
5. Total customer price is auto generated.
6. Enter required date, promise date and due date.
7. Select tax class. Tax environment is auto displayed.
8. Click on this button, to save entered line details.

Save Sales Quote

1. Click on this button, to save entered quote details.

Sales Quote Saved

1. It shows saved quote entry. Its status is 'Not Submitted'. Click on 'Submit SQ' button. It goes for approval. On approval, status becomes 'QAD Submitted'. Quote goes to QAD. After doing release, SO is created in QAD.