

Quotation

Module Guide: Quotation

Module Location

Sales > Quotation > Quotation

Module Objective

The **Quotation** module is used to create, manage, and send official price quotation documents to customers. This document is the formal response to a customer's request (recorded in the Customer RFQ module) and contains the details of products, prices, discounts, taxes, and other terms being offered.

1. Main View (Quotation List)

The main page of this module displays a list of all quotations that have been created.

The screenshot shows the 'Sales | Quotation | Quotation' interface. It features a search bar with 'Quotation Number' and 'Any Part of Field' dropdowns, and a 'NONE' dropdown. Below the search bar are filters for 'Item Category' (RAW MATERIAL), 'Status' (---All---), 'Date From' (1 March 2022), and 'Date To' (31 March 2022). There are also 'Document Filter Status' and 'Approval Filter Status' sections. The main table has columns: No., Quotation Number, Customer, Quotation Date, Status of Sales Offering Letter, Approval, and Expired. The table currently displays 'No Record Found'. At the bottom, there are 'New', 'Expired', and 'Print' buttons.

View Explanation & Filters

This page is for viewing and managing all existing quotations.

- **Filters:** You can search for a specific quotation by **Quotation Number**, **Item Category**, **Status**, or a date range (**Date From / Date To**).

- **Quotation List:** The table below will display all quotations that match the filters, with columns such as **Quotation Number**, **Customer**, **Quotation Date**, and **Status of Sales Offering Letter**.

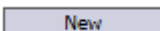
Button Functions

- **New:** The primary button to create a new Quotation.
- **Expired:** To change the status of a quotation that has passed its validity period to "Expired".
- **Print:** To print a selected quotation document to be sent to the customer.

2. Steps to Create a Quotation

Step 1: Create a New Quotation

From the Main View, click the **New** button to open the **New Quotation** form.

A rectangular button with the word "New" in a light blue font on a light gray background.

Step 2: Fill in Header Information

On the form that appears, fill in the general quotation information:

- **RFQ Code:** For efficiency, select the **RFQ Code** from the recorded customer request. This will automatically pull the customer data and the list of requested items.

RFQ Code :

- **Quotation Date & Due Date:** Set the **Quotation Date** and the **Quotation Expiration Date** (validity period).

Quotation Date : 5 August 2025 
Due Date * : 5 August 2025 
Currency : 

- **Sales Person:** Assign the salesperson responsible for this quotation.

Sales Person * : 

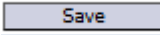
Step 3: Detail the Price and Discount per Item


In the detail table at the bottom, complete the pricing information for each product:

1. Fill in the **Unit Price (IDR)** column for each item.
2. If there is a discount, fill in the **Disc Value** (for a nominal reduction) or **Discount (%)** (for a percentage reduction) column.
3. Select the appropriate tax code, and the system will calculate the tax value in the **Tax 1 (IDR)** column.
4. The system will automatically calculate the **Total Amount**, **Total Tax**, and **Grand Total** in the bottom-right corner.

Step 4: Save and Confirm

After all data is filled in, use the buttons in the bottom-left section:

- **Save:** To save the quotation as a draft. 
- **Confirm:** To finalize and send the quotation into the approval workflow.



- **Cancel:** To cancel the entry. 

Tips & Important Notes

- A quotation that has been approved by the customer will become the basis for creating a **Sales Order**.
- Always pay attention to the **Due Date**, as the quotation will be considered invalid after that date. Use the **Expired** button to manually mark quotations that are already expired.
- A **Confirmed** quotation will likely go to a **Quotation Inbox** for an approval process by a manager.

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