RQF Customer

Module Guide: Customer RFQ

Module Location

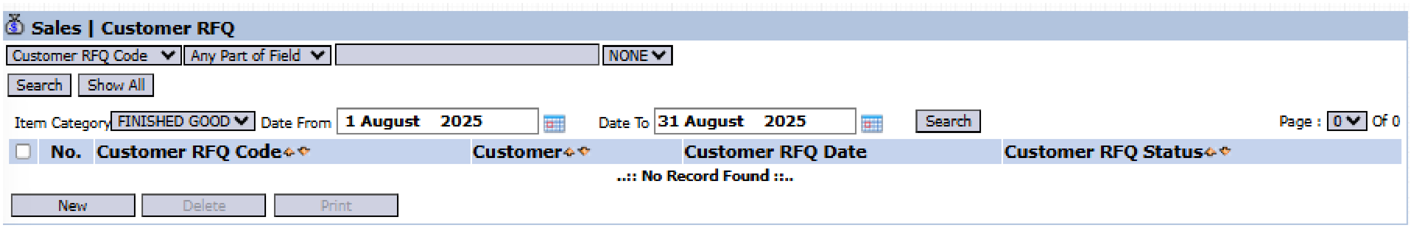
Sales > Quotation > Customer RFQ

Module Objective

The **Customer RFQ (Request for Quotation)** module is used to record and manage official requests for price quotations received from customers. This module serves as the starting point of the formal sales process, where a customer's request is documented in the system before the company provides an official price offer.

1. Main View (Customer RFQ List)

The main page of this module displays a list of all RFQs that have been received from customers and recorded in the system.



View Explanation & Filters

This page is for viewing and managing all incoming RFQs.

- **Filters**: You can search for a specific RFQ by **Customer RFQ Code**, **Item Category**, or a date range (**Date From / Date To**).

- **RFQ List**: The table below will display all RFQs that match the filters, with columns such as **Customer RFQ Code**, **Customer**, **Customer RFQ Date**, and **Customer RFQ Status**.

Button Functions

- **New**: The primary button to record a new RFQ received from a customer.
- **Delete**: To delete a selected RFQ data.
- **Print**: To print the details of a selected RFQ.

2. Steps to Create a Customer RFQ

Step 1: Create a New RFQ Record

From the Main View, click the **New** button to open the **Create Customer RFQ** form. 

Step 2: Fill in Header Information

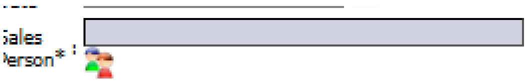
On the form that appears, fill in the general information regarding the customer's request:

- **Customer**: Select the customer who sent the RFQ.


- **External RFQ Number**: Enter the RFQ reference number from the document provided by the customer. This is important for matching documents.


- **RFQ Date**: Select the date the RFQ was received.

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



Step 3: Detail the Requested Items

Use the detail table at the bottom to list all the products and quantities requested by the customer:

1. Click the **[+] Multiple Item [-]** link to add or remove rows.

2. Fill in the **Item Code** and **Quantity** columns according to the customer's request document.

Step 4: Save the RFQ

After all data is filled in, click the **Save** button in the bottom-left section to save the RFQ record into the system. 

Tips & Important Notes

- Recording a customer's RFQ in this module is a good first step for a **structured and documented** sales process.
- The RFQ data saved here will become the basis for creating the official **Quotation** document for the customer in the next module.
- Always fill in the **External RFQ Number** field if it is available, to facilitate communication and document matching with the

customer.

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