

Quotation

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Quotation header

Title	Widget	Widget description
Create quotation	<div><div>+</div><div>OFFER</div></div>	<div>Click: Opens the new quotation header</div> <div>Available</div> <div>a. Customer details</div>

General

Header

DeDeNet GmbH / Business-, Web,- und Mobile Solutions				<div><div>2</div><div>!</div></div>
Liefertermin	<div><div>1</div><div>Positionen</div></div>	Kundenangebotsnummer	Mandant	Summe
-	0 0		Default	0,0000

1. Shows the number of items and the total quantity (items | total quantity)

2. The exclamation mark is shown in red if there is a special feature with the quotation, e.g. delivery block.

1. Contains additional quotation-related information

2. Click: Opens the information

Form

Quotation

Field	Right	Reference
Type of quotation	ORDER / header / Types of orders	Code table: DeDeSales Type of order
Order type	ORDER / header / Order type	Code table: Order type
Delivery date	ORDER / header / Date of delivery	
Quotation valid until	ORDER / header / Fixed value date	
Offer Confirmation	ORDER / header / Order confirmation	
Incoterms	ORDER / header / Incoterms	Code table: Incoterms

Field	Right	Reference
Quotation date	ORDER / header / Date of order can be freely changed by employee	
Discount in %	ORDER / header / Order discount	
Terms of payment	ORDER / header / Terms of payment	Code table: Terms of payment
Method of payment	ORDER / header / Method of payment	Code table: Method of payment
Freight costs	ORDER / header / Show freight cost selection	
Campaign	ORDER / header / Campaigns	Campaigns

Offer Information

Field	Right	Reference
Offer Information external	ORDER / header / External order text	
Offer Information internal	ORDER / header / Internal order text	
Delivery note	ORDER / header / Delivery note	
Picking text	ORDER / header / Picking text	

{{DDN-01@111#bkmrk-lieferung}}

Customer Offer Information

Field	Right	Reference
Customer Offer Number	ORDER / header / Customer order number	
Contact	ORDER / header / Select contact	Contacts
List of contents	ORDER / header / List of contents	

{{DDN-01@111#bkmrk-zusammenfassung}}

Validation

A validation and recalculation of the order items takes place as soon as one of the following fields in the header is changed:

1. Type of quotation
2. Delivery date

3. Quotation date

4. Discount in %

Time	Type	Validation	Display
Creation	Blocked	Create quotation not possible! The customer has an order block. <code Order block>	Popup
Completion	Warning	<ol style="list-style-type: none">1. Minimum order value not reached.2. Credit limit exceeded.3. Minimum order value not reached.	Message
Completion	Blocked	<ol style="list-style-type: none">1. Delivery date not possible.2. No type of quotation specified.3. Quotation date is in the future.4. Delivery address incorrect.5. Delivery address no longer exists.6. Postal code incorrect.7. Minimum order value not reached.8. No Customer Offer Number specified.9. No delivery point specified.10. No delivery date specified.11. Delivery date is before order date.12. No quotation completion for prospects.	Message

Time	Type	Validation	Display
Completion with order split	Enquiry	You have items from several clients in this quotation. To proceed to the next step, the quotations must first be split. Would you like to perform the quotation split now?	Popup

Action buttons

Name	Function	Visibility
Save	Saves the quotation. The quotation can be further edited later but cannot yet be sent.	Directly when creating the quotation or when clicking the pencil in the quotation mask.
Complete	Saves the quotation and sets the status to Completed. The quotation can be selected and sent in Data Transfer.	When clicking "Complete" in the quotation mask.
Send	The quotation is completed and the dispatch of this quotation is executed immediately.	When clicking "Complete" in the quotation mask.
Transfer to another device	Transfers the quotation to another device of the employee.	If you have clicked Save in the quotation mask and the employee has multiple devices assigned.

FAQ

Release

Quotation mask

Title
Quotation If a type of order is selected: Quotation / "Type of order"

General

Kebab menu (:)

Type	Menu item	Explanation
	Quotation header	
	Send order suggestion	
	Live price enquiry	
	Listing	
	Terminate Offer	
	Interrupt Offer	
	Customer notes	Coming via the Summary from the Dashboard, Customer is shown as a jump-off.

Header

DeDeNet GmbH / Business-, Web,- und Mobile Solutions					
Liefertermin	Positionen	Kundenangebotsnummer	Mandant	Summe	
-	1 1	-	Default	450,0000	

1. Shows the number of items and the total quantity (Items | Total quantity)
2. The exclamation mark is displayed in red if there is a special feature with the quotation, e.g. Delivery block.
 1. Contains additional quotation-related information
 2. Click: Opens the information
3. Jumps to the [Quotation header](#)

{{DDN-01@112#bkmrk-grid}}

{{DDN-01@112#bkmrk-positionen}}

Grid area

Title
The title shows which products are displayed, e.g. the name of the order template.
If there is no concrete list, the title "Product entry" is used.

{{DDN-01@121#bkmrk-allgemein-1}}

Entry Area

Title
Product entry

General

Kebab menu (:)

The entry area has the same [Kebab menu](#) as [Item entry - Grid](#).

Header

In portrait view, the [Header](#) starts with the definition from the grid area.

Function	Explanation
	Jumps back one item in the grid area.
	Transfers the product to the cart. The entry area is exited/closed.
	Transfers the product to the cart and jumps forward one item in the grid area.
	Jumps forward one item in the grid area.
	You have selected a matrix item. Clicking the button opens the Matrix entry .

Following the functions is the [Tab bar](#).

Validation

Time	Type	Validation	Display
Item call	Warning	<ol style="list-style-type: none"> 1. Comment present 2. Status notice 3. Current not in open listing 4. Limit Price undershot 5. List Price exceeded 6. Max Order Quantity exceeded 7. Quantity of Goods increase optional and quantity check fails. 8. Max item value exceeded 9. Start of Delivery after Date of delivery 10. Date of delivery not possible 11. Max Quantity exceeded 	Message
Item call	Warning	Current is in Back Order. An additional info button opens the information about the Back Order.	Message

Time	Type	Validation	Display
Item call	Blocked	<ol style="list-style-type: none"> 1. Product Locked 2. Current not in closed listing 3. Product not intended for Client. 4. No charge without Reason for free offer. 5. Quantity of Goods increase mandatory and quantity check fails. 6. Manual price without Note 7. Natural quantity without Reason for free offer. 8. Batch mandatory for Quantity of Goods. 9. Quantity invalid. 	

Scan function

- Scanning a product already in the entry mask increases the quantity in quantity of goods steps.
- Scanning another product
 - takes over the current product (like the "Save" function)
 - checks if the scanned product exists
 - Yes: Takes over the product as a new line item in the entry mask.
 - If a batch is required, the [batch selection](#) now appears, unless the batch is already included in the barcode.
 - No: Switches to the [grid area](#) and displays the standard message for not found.

Tab bar of the entry mask

The tab bar contains further information about the currently selected product or offers you the possibility to make additional entries. Depending on the activated rights, the tabs may not be visible or contain less information.

TAB: POS

The display of the individual fields depends on the activated rights in the employee's role.

Field	Right	Note
Quantity	This field is always present.	
Rebate in kind	ORDER / item / Rebate in kind	Only available in smartphone portrait view, as it is normally located in the entry mask.
 		If the Rebate in kind field is not visible, buttons to decrease/increase the quantity in order unit steps are displayed.
Order units		This is not an input field.
Price	This field is always present.	If the price is manually changed, it is displayed in red.
Discount in %	ORDER / item / Enter discount	
Total		This is not an input field. The total changes automatically with the input.
From vehicle	ORDER / item / Goods already delivered	
Internal text	ORDER / item / Internal note	
Customer text	ORDER / item / External note	
Note 3	ORDER / item / Note 3	
Note 4	ORDER / item / Note 4	

Field	Right	Note
Retail price	ORDER / item / Retail price	
Reason for free offer	various	
Date of delivery	ORDER / item / Delivery date by item	
Long text (quotation only)	ORDER / item / Long texts editable in quotations	

Batch items

If a batch item is called up and batch recording is intended, the batch must first be selected / entered there. The following is displayed for this purpose:

1. Note: "Batch required"
2. Dropdown: "Select opportunity"
3. Input field "Enter opportunity"
4. Action button "Apply"

As long as the batch is not selected, the [functions](#) "Save" and "Right arrow (green)" are inactive.

TAB: DETAILS

Field	Note
Product image	Click opens "Products > Images"
Customer product no.	If it is a transfer order, the customer product no. is first determined based on the debtor. If no entry is found, the check is performed with the distributor.
EAN CODE	
Colour	
Size	
Commission	
Limit Price	
RRP	

TAB: MODULE

Modules are configured individually in the backend. Up to 5 modules can be displayed.

This tab is only displayed if modules are configured. See also [Modules in the backend](#)

TAB: HISTORY

Shows the item lines of the invoice documents for the selected customer and the selected product. The number of visible lines can be set in the backend via Basic configuration - Settings "Item history". The tab is only displayed if the corresponding right is set in the role, area "ORDER / items" in the backend.

Name	Visible	Sort	Full text	Explanation
Date	Always	Descending		
Receipt Number	Landscape		Yes	
Quantity	Always			
Price	Always			

Swipe: Show receipt

TAB: GRADUATED PRICES

Shows the available graduated prices of the offline pricing for the selected customer and the selected product. The tab is only displayed if the corresponding right is set in the backend.

Name	Visible	Sort	Full text	Explanation
Graduated price	Always			Standard Price, 1st graduated price, 2nd graduated price, etc.
Quantity	Always	Ascending		
Price	Always			
Valid from	Hidden			
Valid until	Hidden			

TAB: UNITS

Shows the units for the selected product. The tab is only displayed if the corresponding right is set in the backend.

Name	Visible	Sort	Full text	Explanation
------	---------	------	-----------	-------------

Unit	Always	Ascending	Yes	
EAN	Always		Yes	
Quantity	Always			
Weight	Landscape			
G-unit	Landscape			
Size	Landscape			
BME	Landscape			
Quantity in order units	Landscape			

TAB: BILLS OF MATERIALS

Shows the products contained in the selected bill of materials product. The tab is only displayed if the corresponding right is set in the backend.

Name	Visible	Sort	Full text	Explanation
Product	Landscape		Yes	
Name	Always	Ascending	Yes	
Quantity	Always			
EAN	Landscape			

TAB: PRICING

Shows the results of the standard pricing, otherwise the tab remains empty.

Name	Visible	Sort	Full text	Explanation
Type	Always		Yes	Price or discount
Condition	Always		Yes	PRL.Condition KGB.Condition
Priority	Hidden			PRL.Priority KGB.Priority

Name	Visible	Sort	Full text	Explanation
Customer number	Hidden			PRL.PriceGroupCustomerNumber KGB.CustomerNumber
Price list	Hidden			PRL.PriceList
Customer group	Hidden			KGB.CustomerGroup
Customer discount group	Hidden			KGB.DiscountGroup
Item discount group	Hidden			KGB.ItemDiscountGroup
Product group	Hidden			PRL.ProductGroup KGB.ProductGroup
Item number	Hidden			PRL.ItemNumber KGB.ItemNumber
Client	Hidden			PRL.Client
From quantity	Hidden			PRL.ValidFromQuantity KGB.ValidFromQuantity
Price	Always			PRL.RetailPrice
Discount	Always			KGB.Discount

Release

From version 17

1. TAB: PRICING

Matrix Entry

Title
Product entry

General

Header

In the matrix entry, the [Header](#) corresponds to the definition from the grid area with the following changes:

1. If different products are selected in the matrix, for which the values to be displayed in the header differ, "Multiple selection" is displayed in red instead.
2. + is displayed if none of the selected products are In Basket yet.
3. A pencil is displayed if at least one of the selected products is In Basket.
4. Scrolling in the matrix causes the header to be shown/hidden.

Entry Area

In the matrix entry, the [Entry Area](#) corresponds to the known definition with the following changes:

1. If the selection contains products that are already In Basket and these have different values in the fields of the entry mask, these fields are Hidden as they cannot be edited.
2. +/- adjusts the Quantity in the packaging unit that all products have in common (LCM).
3. If multiple products are selected
 1. only the TAB ITEM is shown.
 2. Information from the header is Hidden.
4. The scanner is deactivated in the matrix.
5. Batch management required products are not available in the matrix.

FAQ

Release

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Product documents

Title
Product documents "<Produktbezeichnung>"

General

Grid

Click	Swipe	Views
Document Header		1. Table

Column definition

Name	Visible	Sort	Full Text	Explanation
Colour code	Forced			Red: If cancelled
Document type	Visible			
Document number	Visible		Yes	
Document date	Visible	Descending		
Batch	Hidden			
Quantity	Visible			
Price	Visible			
Cancelled	Hidden			
Reason for cancellation	Hidden			