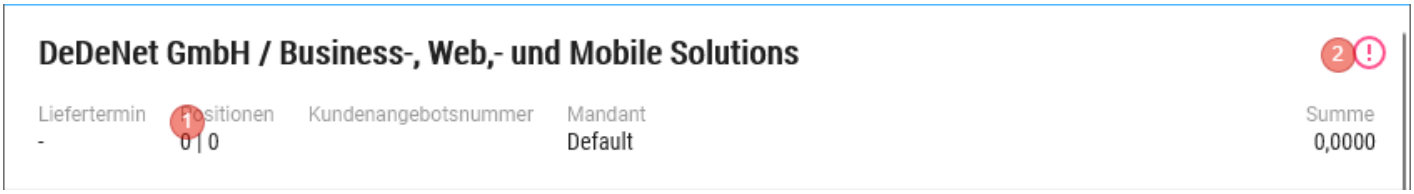
Quotation header

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

General

Header



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	

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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	

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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	1. Minimum order value not reached. 2. Credit limit exceeded. 3. Minimum order value not reached.	Message
Completion	Blocked	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

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