

Title: VA21 Creation of Quotation
SAP Sales and distribution
Module:
C SD Creation of Quotation

PROJECT DASHBOARD

<http://dc666.4shared.com/doc/-7rHupil/preview.html>

Work Instruction

VA21 Creation of Quotation

VA21

Purpose

Creation of Quotations is a pre-sales process. A quotation presents the customer with a legally binding offer for delivering a product or providing a service within certain fixed conditions. This offer is legally binding for the company within a specified time period.

Trigger

Perform the transaction when customer inquires about product in your warehouse and you want to send the quotation to the customer with reference to customer inquiry.

Prerequisites

- Customer Inquiry document should exist.
- Sales area (Sales organization, Division, Distribution channel)

Menu Path

Use the following menu path(s) to begin this transaction:

Select **Logistics → Sales and Distribution → Sales → Quotation → Create**

Transaction Code

VA21: Create Quotation

VA22: Change Quotation

VA23: Display Quotation

Helpful Hints



- Creating and maintaining quotations may be useful under circumstances like if you want to evaluate your pre-sales processing with reports and analysis.

- Quotations can be created using inquiry document saves a lot of data entry efforts.

Field Description Tables

The **R/O/C** column of each Field Description table indicates whether the field usage is:

R - Required in SAP

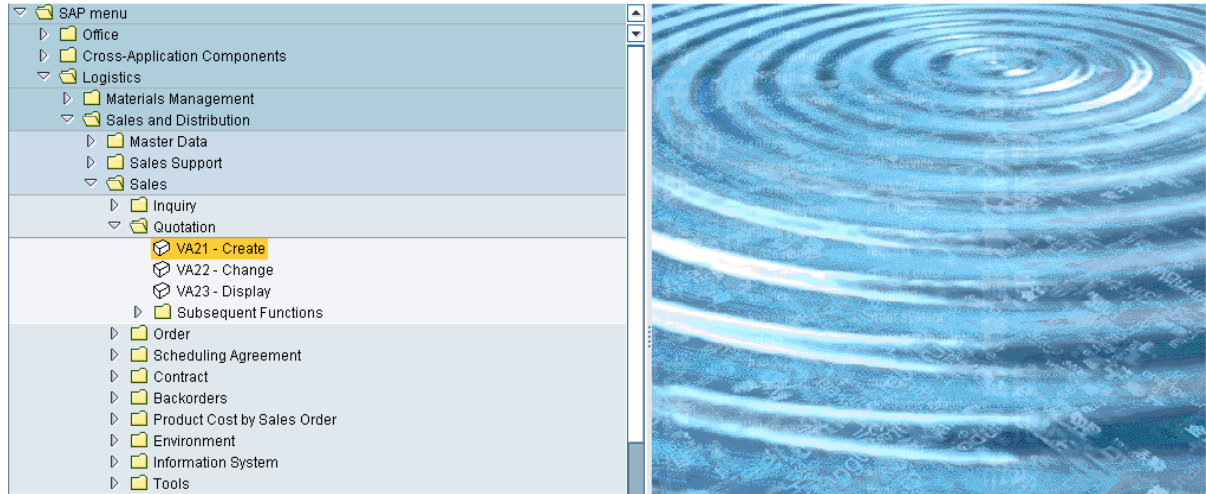
O - Optional in SAP

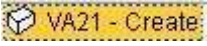
C - Conditional in SAP

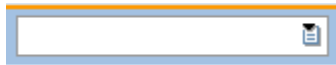
Procedure0

1. Start the transaction using the menu path or transaction code.

SAP Easy Access



2.0 Double-click  Or Enter the T. Code VA21 in the Command Field

A screenshot of the SAP command field, which is a rectangular box with a small icon on the right side.

and press  to go to *Create Quotation: Initial screen*.

Create Quotation: Initial Screen


Create Quotation: Initial Screen

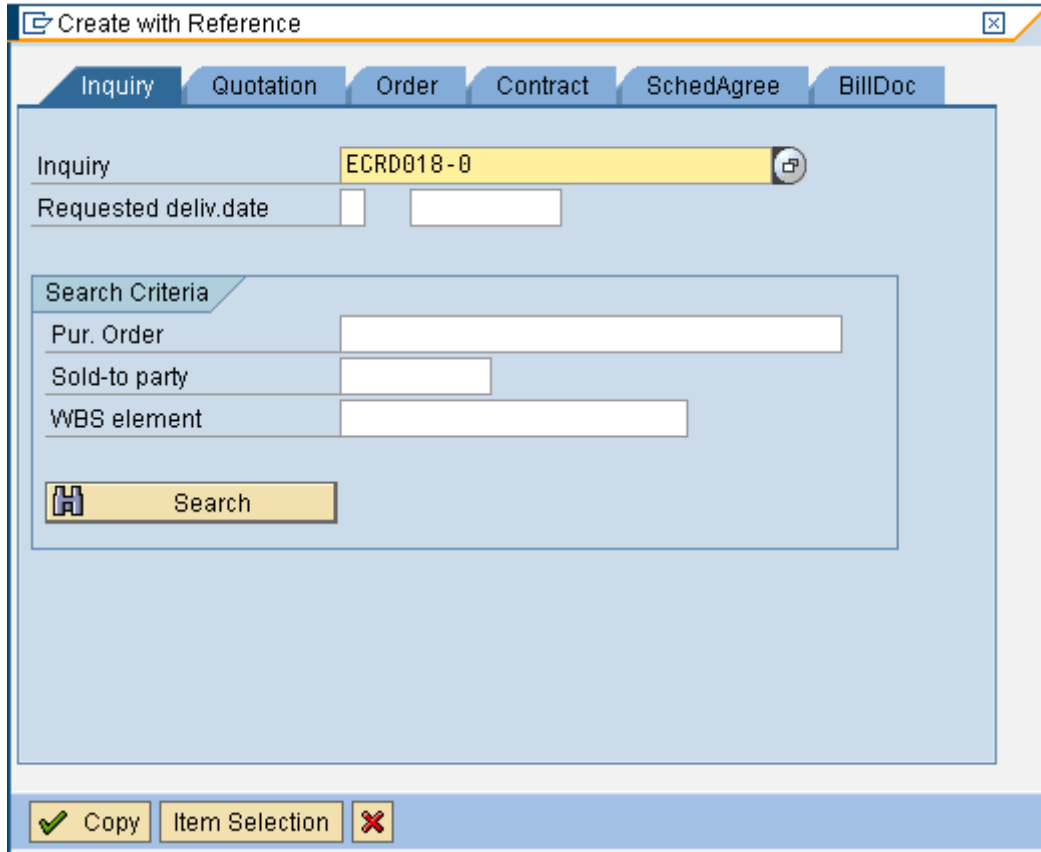
The screenshot shows the 'Create Quotation: Initial Screen' in SAP. At the top, there are four buttons: 'Create with Reference', 'Sales', 'Item overview', and 'Ordering party'. Below these buttons, there is a section for 'Quotation Type' with a dropdown menu showing 'ZQT' and the text 'TiTaN Quotation'. Below this is a section for 'Organizational Data' with five input fields: 'Sales Organization', 'Distribution Channel', 'Division', 'Sales Office', and 'Sales Group'.

3.0 As required, complete/review the following fields:


Field Name	R/O/C	Description
Quotation type	R	A classification that distinguishes between different kinds of sales document. The sales document type you enter determines the kind and sequence of screens that follow. Example: ZQT (TiTaN Quotation)

Field Name	R/O/C	Description
		ZQR (Repair Quotation) ZQS (Service Quotation)

4. Select  **Create with Reference** to create quotation with reference to inquiry document. This will reduce the data entry efforts since the data from inquiry document get copied into quotation.



5. As required, Complete/Review following fields:

Field Name	R/O/C	Description
Inquiry Number	R	Enter Inquiry number or click  to search inquiry document. Example: ECRD018-0

4. Select  **Copy** to go to *Create Quotation: Overview Screen*.

Create TiTaN Quotation CR020-0: Item Data

Sales Document Item Item category Standard Item
 Material Hastelloy gatevalve-1" 150 class

Sales A Sales B Shipping Billing Document Billing plan Conditions Account assignment Schedule lines Partners Texts

Order Quantity and Delivery Date
 Order Quantity EA EA
 First Delivery Date
 Delivery time

General Sales Data
 Net value INR Exch. Rate
 Pricing date
 Material entered
 EAN/UPC
 Engineering change BOM explosion number
 Usage
 Bus.transaction type
 Reason for rejection ☐ Preference
 Order probability Alternative to item

5. Select tab **Conditions** to maintain pricing conditions.

Create TiTaN Quotation CR020-0: Item Data

Sales Document Item Item category Standard Item
 Material Hastelloy gatevalve-1" 150 class

Sales A Sales B Shipping Billing Document Billing plan Conditions Account assignment Schedule lines Partners Texts

Qty EA Net INR
 Tax

Pricing Elements

N	CnTy	Name	Amount	Crcy	per	U	Condition value	Curr.	Status	Nu.	OUn	CConDe	Un	C	Stat
PR00		Price	15,000.00	INR		1 EA	15,000.00	INR		1 EA			1 EA	00	
		Ex-Works Price	15,000.00	INR		1 EA	15,000.00	INR		1 EA			1 EA	00	
AZWR		Down Pay/Settlement	0.00	INR			0.00	INR					0	00	
		FOB Price	0.00	INR		1 EA	0.00	INR		1 EA			1 EA	00	
JEXP	IN:	AVR BED %	16.000 %				0.00	INR		0			0	00	
JCEP	IN:	AVR Cess %	2.000 %				0.00	INR		0			0	00	
JA1X	IN:	AVR SECess %	1.000 %				0.00	INR		0			0	00	
		FOB Price + Excise	0.00	INR		1 EA	0.00	INR		1 EA			1 EA	00	
JIN6	IN:	AVR VAT	4.000 %				0.00	INR		0			0	00	
		FOB Price + Excise +	0.00	INR		1 EA	0.00	INR		1 EA			1 EA	00	
JFRE	IN:	Frieght (Lumpsum)		INR				INR		0			0	00	
		CFR Price	15,000.00	INR		1 EA	15,000.00	INR		1 EA			1 EA	00	
JINS	IN:	Insurance		INR				INR		0			0	00	
		CIF Price	15,000.00	INR		1 EA	15,000.00	INR		1 EA			1 EA	00	

6. As required, Complete/Review following fields:

Create TiTaN Quotation CR020-0: Item Data

Sales Document Item: 10 Item category: AGN Standard Item
Material: VGHC2761150 Hastelloy gatevalve-1" 150 class

Sales A Sales B **Shipping** Billing Document Billing plan Conditions Account assignment Schedule lines Partners Texts

Ship-to party: 100011 Chemplast Sanchar Ltd //

Shipping

Unloading Point: Receiving point:

Department: Delivery Prior.: 1 Fast Track

Plant: TTP1 TITAN PLANT 1 Stor. Location:

Shipping Point: TSP1 TITaN Shipping Point Part div./item:

Route: Max.Part.Deliv.: 9

Mat.freight grp: Order Combinat.: ☒

MnsOfTrns type: Shipping type:

MeansTransp.: Spec.processing:

☐ POD-relevant

Weight and Volume

Net weight: 10 KG Gross weight: 10 Volume:

Delivery Tolerance

Overdeliv. Tolerance: % Underdel. Tolerance: % Unlimited tol.: ☐

5. As required, Complete/Review following fields:

Field Name	R/O/C	Description
Plant	R	Plant from where the goods are dispatched. Example: TTP1 (TiTaN Plant 1)
Shipping point	R	The physical location from which you ship the item. Example: TSP1 (TiTaN Shipping Point)
Max Partial Deliveries	O	The maximum number of partial deliveries you can make (including the first delivery) to satisfy the order quantity for an item. Example: 9
Order Combinat.	O	Indicates whether you are allowed to combine orders during delivery processing. Tick <input checked="" type="checkbox"/> if you want to combine orders during delivery process.

6. Click  to go to *Create Quotation: Overview screen*.

Create TiTaN Quotation CR020-0: Overview

TiTaN Quotation: CR020-0 Net value: 15,000.00 INR
 Sold-to party: 100011 Chemplast Sanchar ltd //
 Ship-to party: 100011 Chemplast Sanchar ltd //
 PO Number: PO date:

Sales **Item overview** Item detail Ordering party Procurement Shipping Reason for rejection

Valid from: 09.10.2007 Valid to:
 Req. deliv.date: D 02.11.2007 Expect.ord.val.: 10,500.00 INR

Item	Material	Order Quantity	SU	Altitm	Description	Customer Material
10	VGHC2761150	1 EA			Hastelloy gatevalve-1" 150 class	

7. Select **Sales** to maintain validity date of quotation and payment terms.

Create TiTaN Quotation CR020-0: Overview

TiTaN Quotation: CR020-0 Net value: 15,000.00 INR
 Sold-to party: 100011 Chemplast Sanchar ltd //
 Ship-to party: 100011 Chemplast Sanchar ltd //
 PO Number: PO date:

Sales **Item overview** Item detail Ordering party Procurement Shipping Reason for rejection

Req. deliv.date: D 02.11.2007 Deliver.Plant:
 Valid from: 09.10.2007 Valid to:
☐ Complete delv. Total Weight: 10 KG
 Pricing date: 06.10.2007
 Total amount: 15,000.00 Doc. Currency: INR / 1.00000
 Incoterms: CIF chennai
 Payment terms: 0001 Pay immediately w/o
 Order reason: T02 Alive

Item	Material	Order Q.	Un	S	Description	Customer Material Numb	ItCa	DGIP
10	VGHC2761150	1 EA		<input type="checkbox"/>	Hastelloy gatevalve-1" 150 class		AGN	
				<input type="checkbox"/>				
				<input type="checkbox"/>				
				<input type="checkbox"/>				
				<input type="checkbox"/>				

8. As required, Complete/Review following fields:

Field Name	R/O/C	Description
Order Reason	R	The Current Status of the Quotation can be chosen from the list. Example: T01- Alive
INCO terms	R	It will be defaulted from the Customer Master. But You can change that if needed. Example: FOB Chennai

4. Goto Item → Billing Plan and maintain the various down payments

Create TiTan Quotation CR020-0: Item Data

Sales Document Item: 10 Item category: AGN Standard Item
 Material: V6HC2761150 Hastelloy gatevalve-1" 150 class

Sales A Sales B Shipping Billing Document **Billing plan** Conditions Account assignment Schedule lines Partners Texts

Netvalue: 15,000.00 INR

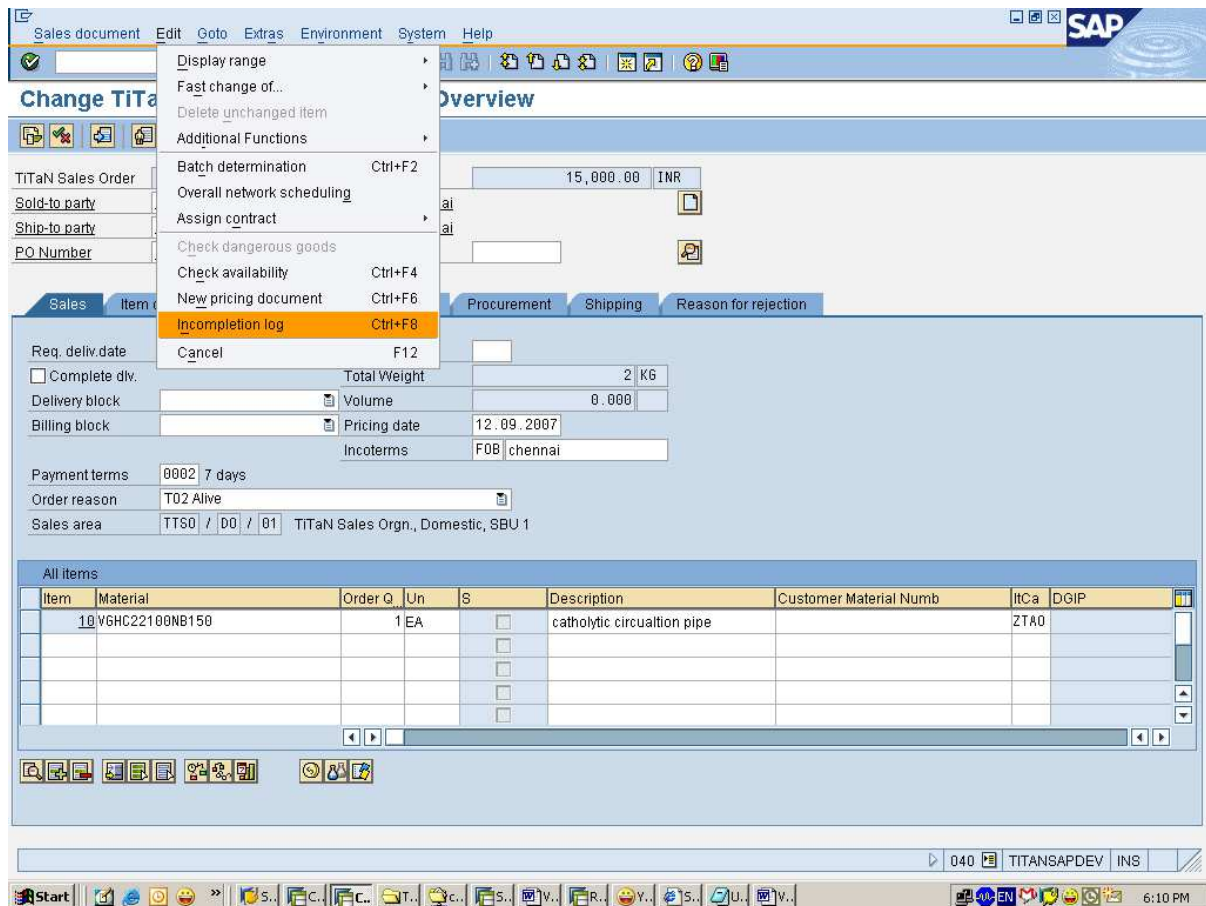
Billing plan
 BillingPlanType: 01 Milestone Billing
 Start date: Today's Date Reference:


InvoicePercentg: 100.00 Billing value: 15,000.00 INR

Dates


Billing Date	DtDs	MistRel		%	Bill.value	Crcy	Block	MStn	BR	BillSt	PayT	DCat	Billing Type	ExchRtAct	Milestone r
15.10.2007	T013	T0001	Advance Payme	40.00	6,000.00	INR	02	<input type="checkbox"/>	4	A		01	FAZ		0
15.11.2007	T021	T0002	Interim Payme	30.00	4,500.00	INR	02	<input type="checkbox"/>	4	A		01	F2		0
15.12.2007	T027	T0003	Balance	100.00	15,000.00	INR	02	<input type="checkbox"/>	1	A		01	F2		0
<input checked="" type="checkbox"/>								<input type="checkbox"/>							
<input checked="" type="checkbox"/>								<input type="checkbox"/>							
<input checked="" type="checkbox"/>								<input type="checkbox"/>							
<input checked="" type="checkbox"/>								<input type="checkbox"/>							
<input checked="" type="checkbox"/>								<input type="checkbox"/>							
<input checked="" type="checkbox"/>								<input type="checkbox"/>							
<input checked="" type="checkbox"/>								<input type="checkbox"/>							

4. Go Edit → Incompletion Log to check the missed data



4. Click  to save the quotation. System will display message "Quotation XXXX has been saved."

 TITaN Quotation CR020-0 has been saved

4. Click  to come out of transaction. You have completed the transaction.

Result

You have created Quotation in the system with reference to inquiry document.

Comments




Check the other tabbed areas of the header and item sections of the quotation screen to become familiar with the other aspects of the quotation data.



To change quotation document, you either start the transaction using the transaction code, **VA22** or the menu path **Logistics → Sales and Distribution → Sales → Quotation → Change** to go to the *Change Quotation: Initial Screen*. This screen and the subsequent ones are identical to the screens you have come across in the Create Quotation.

Go to Initial screen of 'change quotation'.

π Enter quotation number.

π Select  or press Enter.

π Enter your changes on the subsequent screens.

- Click  to save your input.



To display inquiry document, you either start the transaction using the transaction code, **VA23** or the menu path: **Logistics → Sales and Distribution → Sales → Quotation → Display** to go to the *Display Quotation: Initial Screen*. This screen and the subsequent ones are identical to the screens you have come across in the Create Quotation transaction. The only difference is that all the fields will be in Display mode (grey color). User will not be able to edit or change the Quotation document.
