Migrating quotations from Movex to SAP

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As already described in other articles, SAP mode is quite different from Movex mode when it comes to price data. In SAP mode it is essential that the customer number is a valid SAP customer. The customer number in combination with the sales organization is the key to getting the correct cost and price from SAP. There is no longer any possibility to choose price list for FlexLink material in Quotation Tool.

When you run Quotation Tool in SAP mode and open a quotation that was saved in Movex mode, Quotation Tool will attempt to convert the quotation by finding a matching SAP customer number for your sales organization. If this succeeds you will see an information message with a question:

| 쵢 Customer | 🛕 Quotation | Project | | | | | |
|---------------------------------------|-----------------|--|--|---|-----|---|----------|
| Customer Name | | | | Customer No | | | |
| Barilla Sveriga AB | | | | 23CSE1122 | | Δ | Search |
| Contact person Update customer data ? | | | | | | × | |
| Default Salut | atic First name | | | | | | |
| | | Found a matching customer in SAP 'Barilla Sveriga AB' with customer number 0010025091. | | | | | |
| | | | | ou like to update the qu ddresses, contacts) fro | | | mer data |
| < Currency | Pric | | | | Yes | | No |

As you can see, in this case Quotation Tool has found an SAP customer 0010025091 that is an exact match for Movex customer 23CSE112. If you answer No to the question, only the customer number, sales organization, company code and warehouse will be copied from the SAP customer into the quotation. If you answer Yes, also the customer name, addresses and contact persons in the quotation will be updated with latest information from SAP and CRM.

If Quotation Tool is not able to find a matching SAP customer you will instead get a warning message:

| Customer Name | | Customer No | | | | |
|-----------------------------|----------|--|---------------------------|--|--|--|
| Volkswagen AG | | 32CDE11479 | 🛕 🔎 Search | | | |
| Contact person | Warning | | × | | | |
| Default Salutati First name | for 'Vo' | not automatically identify kswagen AG' (32CDE1147 vant to add FlexLink mate use Search button to find | rial or run price update, | | | |
| < Currency Price | | use search button to min | OK | | | |

When this happens you will need to use the Search button and search for the correct SAP customer to use for this quotation. Otherwise you will not be able to update prices or add FlexLink material to the quotation.