

Default customer

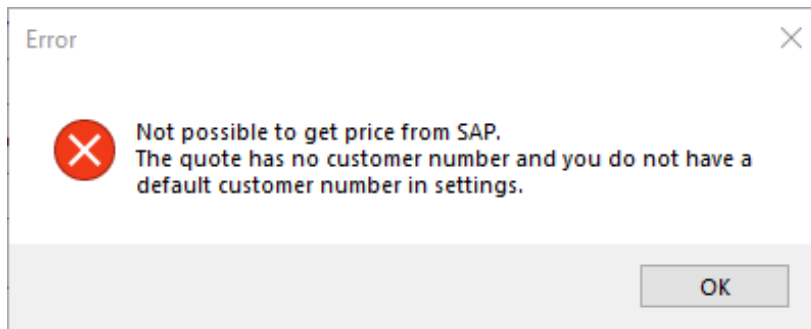
Last Modified on 05/12/2019 9:14 am CET

How to make quotations for customers that do not yet exist in SAP

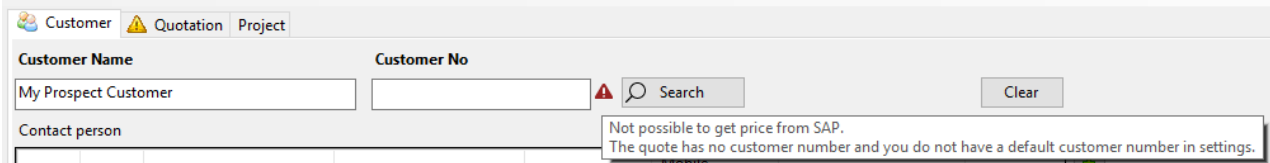
When Quotation Tool is in SAP mode, it must always have access to a valid customer number in order to fetch cost and sales price from SAP.

For existing customers this is not a problem. You just use the customer search function in Quotation Tool and find a customer with a valid SAP customer number; a numeric customer number with 10 digits.

In the customer search you can also find CRM customers that do not exist in SAP. They have a blank customer number. When you select such a customer you will be prompted with an error dialog:



The same warning is also displayed as a red warning icon next to the empty "Customer No" field. If you hover with the mouse pointer over that icon you will see the warning message:

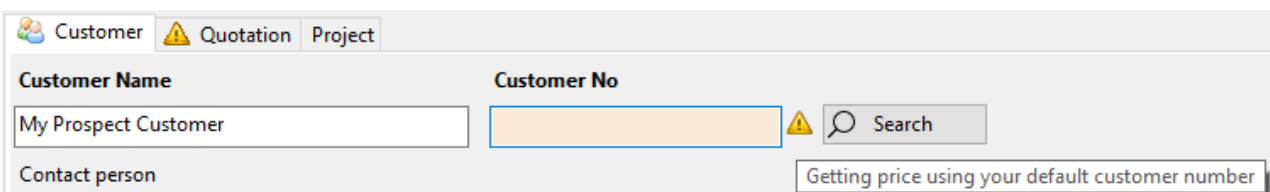


To resolve this problem you can add a default customer number to your settings. When the active quotation does not have a customer number, Quotation Tool will use your default customer number to get cost and sales prices from SAP.

Open menu "Tools" -> "Settings". Scroll down to section "Quotation default" and enter a valid 10 digit SAP customer number for setting "Default Customer Number".

Note: The default customer number you choose must be a valid SAP customer for your sales office

When you have a default customer number in your settings the warning icon will turn yellow and the message will change:



Now when you add FlexLink material to your quotation or run price update, Quotation Tool will fetch cost and sales price from SAP by using your default customer number.