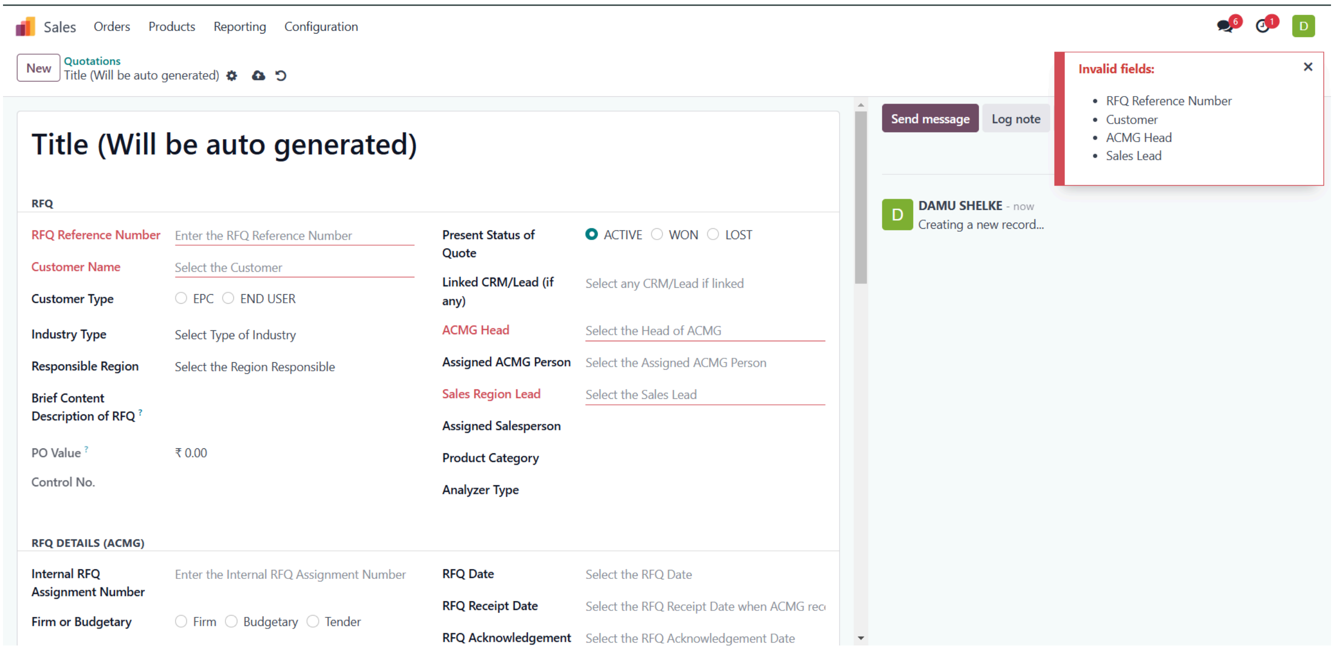
Creating New Records

1. Click on New Button on the list view.

After clicking on the new button, you will be redirected to the "Form View" where you can add all details related to your order. Let's explore them one by one.

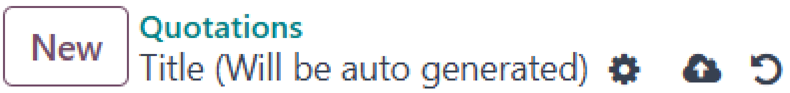


All the columns in an excel sheet are visible as "fields" in the form view. Fields marked in **"RED"** are mandatory and the record cannot be saved unless it's filled.

The Mandatory fields are:

- RFQ Reference Number
- Customer Name
- ACMG head
- Sales Head

2. Going back / Settings / Save / Undo



a. To go back to the **list view**, you can click on the quotations field.
b. If you click on the gear button, you can view extra options like printing or sharing the record with someone and other extra settings which may be useful.
c. The cloud button next to gear is the "**Save Manually**" option.
d. Next to the save button is the **Undo option** to revert back all actions to the last updated stages before saving the record.

> Records are saved automatically even if you forgot to save manually. But it's always safer to save manually once before exiting a record.

3. Selecting Type of Customer

While selecting the type of customer, you have two options : EPC and End User. If you click EPC then a new field pops below it to fill the End User details as shown below in the image in Red.

RFQ DETAILS (ACMG)

Customer Name	ABC
Customer Type	EPC END USER
End User	

4. Selecting Type of Industry

In case the industry type isn't mentioned which is matching with the customer, you can select Others and manually enter the industry type in the field which appears under the industry type field as shown below.

Industry Type	Others
Specify Others	Clothing

List of Industry types available in the drop down are :

- Cement
- Chemical
- Fertilizer
- Oil & Gas
- Petrochemical
- Power
- Steel

5. Read-only Fields

Readonly fields once set, cannot be edited or modified. In case you have to change the value, you can undo the action before saving the record by clicking on the undo button near the save button. Readonly fields appear greyed out indicating that they cannot be edited or modified further.

RFQ Receipt Date	01/15/2025
RFQ Acknowledgement Date	01/15/2025
Proof Of Acknowledgement ?	Upload your file

After setting RFQ Acknowledgement Date, you have to mandatorily add file for "Proof of Acknowledgement". Proof of Acknowledgement will be an email (.eml file)

> In case the record got saved and you want to change the readonly field, you can do so by contacting the admins.

6. Sales Section

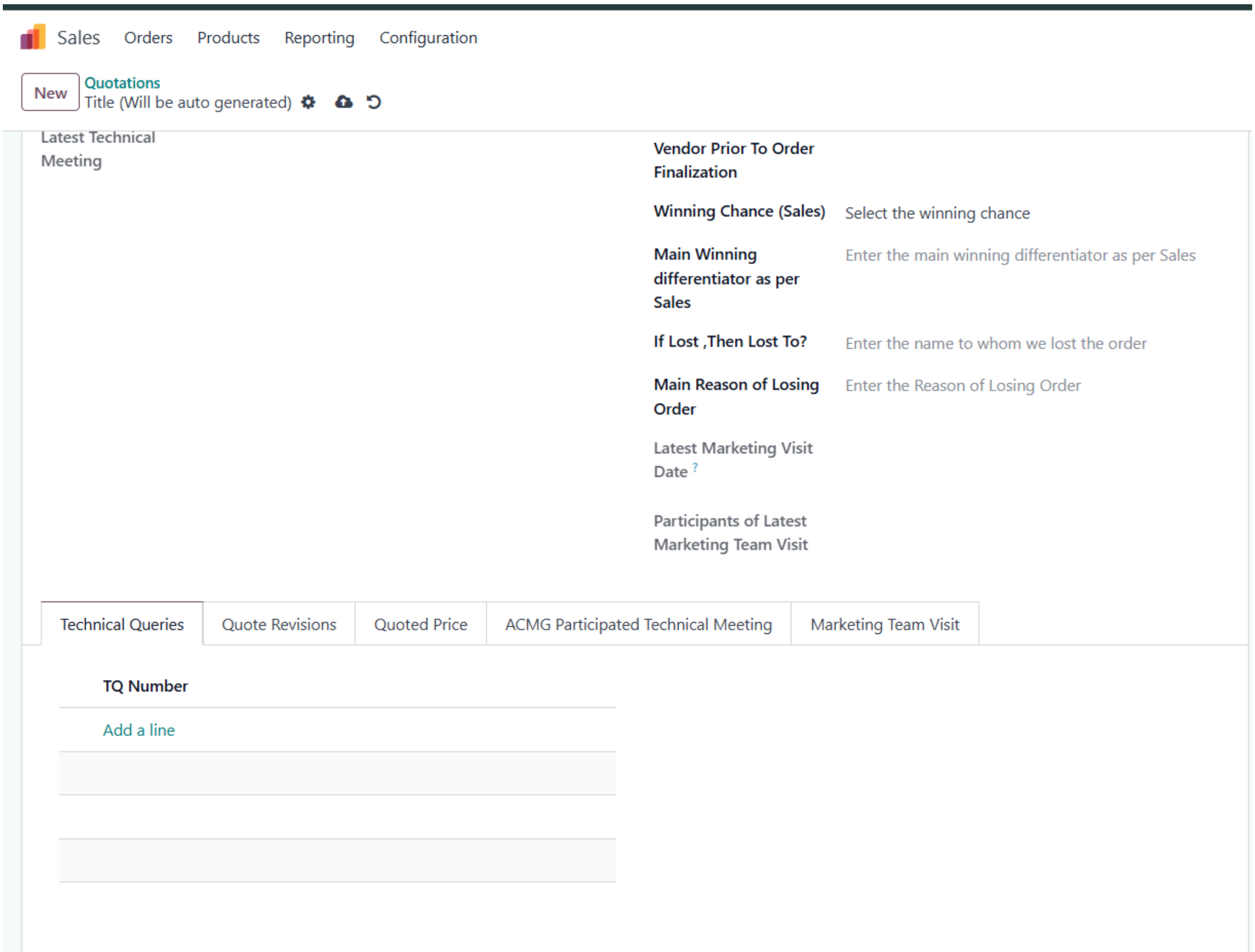
This section is not to be filled by the ACMG teams. This will be edited only by sales region.

SALES

Linked CRM/Lead (if any)	Select any CRM/Lead if linked
Sales Lead	Select the Sales Lead
Assigned Salesperson	
Main Indentor For RFQ	Name the Main Indentor For RFQ
Evaluator from Customer End	Name the Evaluator from Customer End
Decision Taker from Customer End	Name the Decision Taker from Customer End
Tentative Finalization Month	Select the Tentative Finalization Month
Finalization Year	Select the Finalization Year
Competitors ?	
Main Threat From Which Competitor	Select The Competitor From Which We Had Main Th
Customers Prefered Vendor Prior To Order Finalization	Select Customers Prefered Vendor Just Prior To Orde
Winning Chance (Sales)	Select the winning chance
Main Winning differentiator as per Sales	Enter the main winning differentiator as per Sales

7. TQ / Quoted Price / Quoted Revisions / Quoted Price Tabs

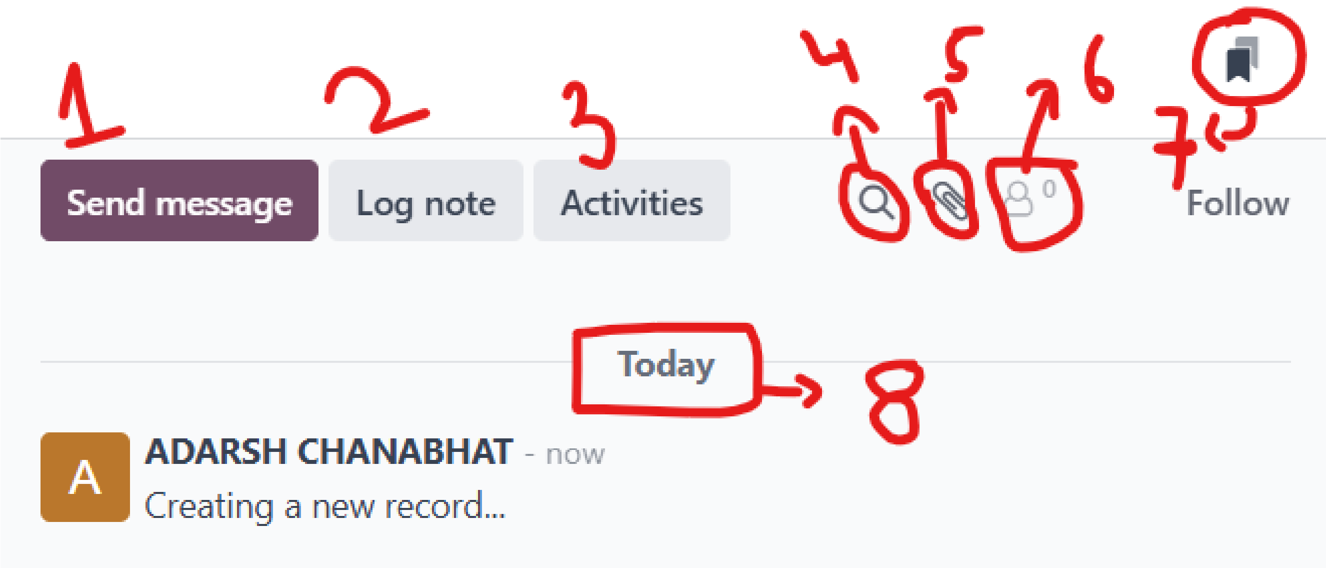
At the end of the form view, you will be see tabs as shown below in the picture.



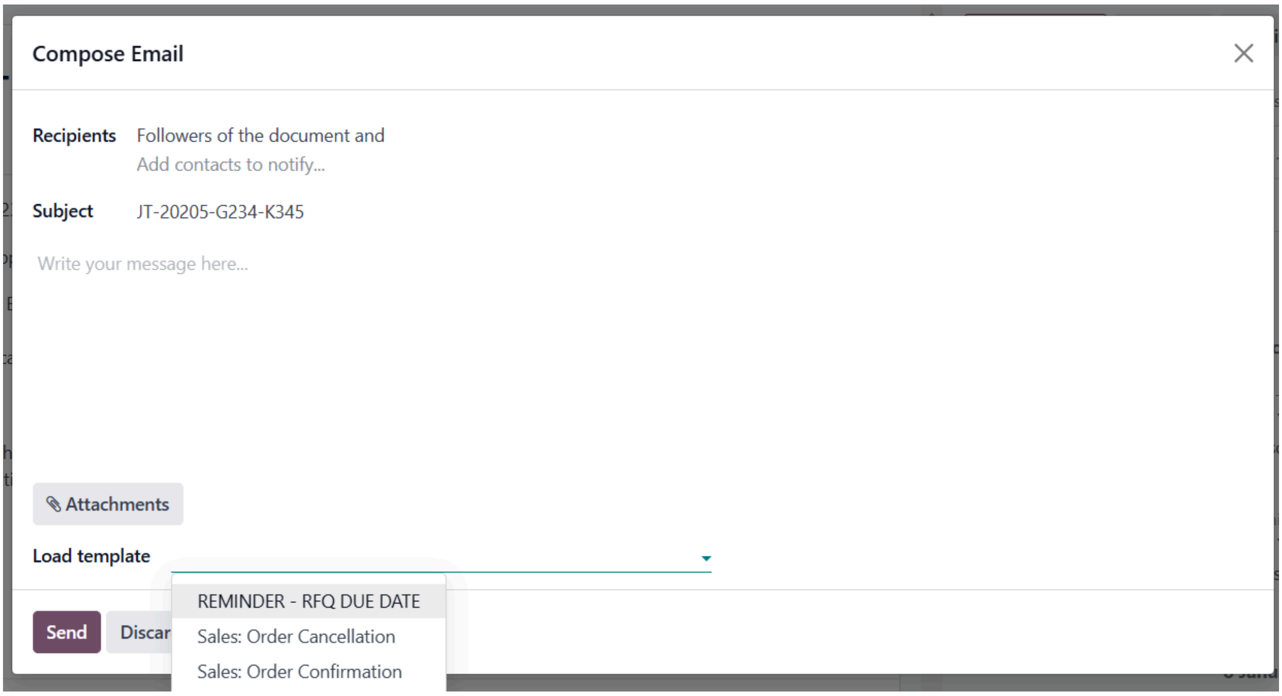
If you click on Add a line , you can add multiple records under TQ Number. Similar for rest of the tabs. The latest record will be fetched in the readonly field which are greyed out.

8. Log Section

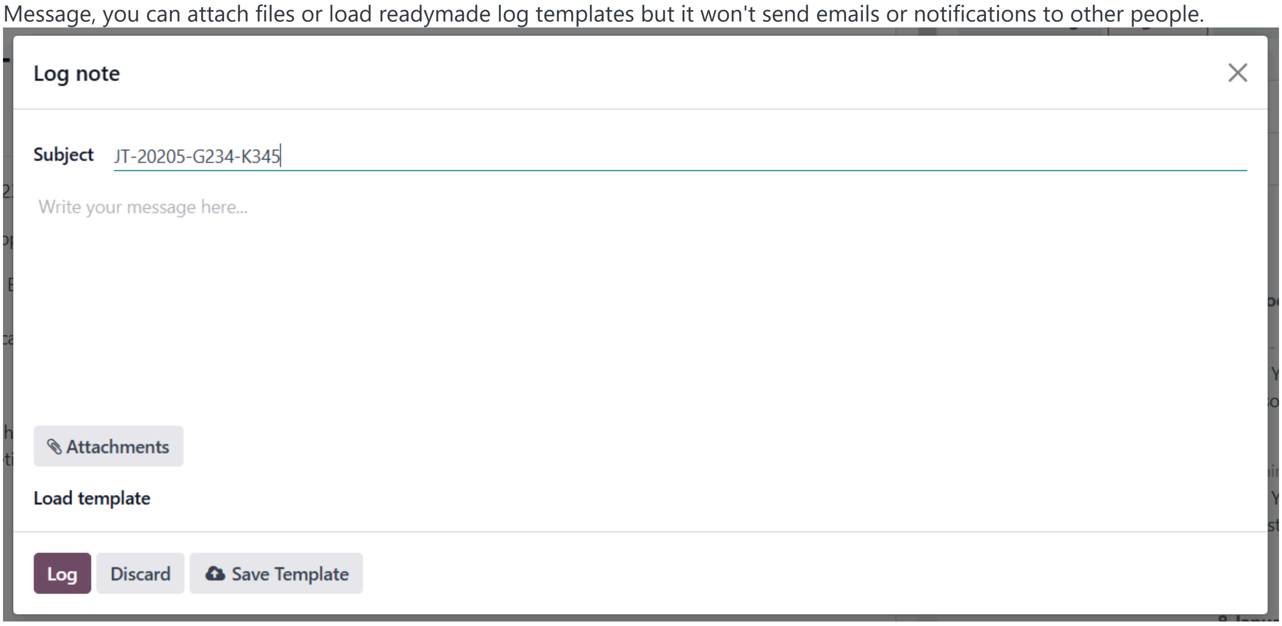
On the right part of the form view, you will see certain menus like this which can be used mostly for communication purposes. We will go through them one by one.



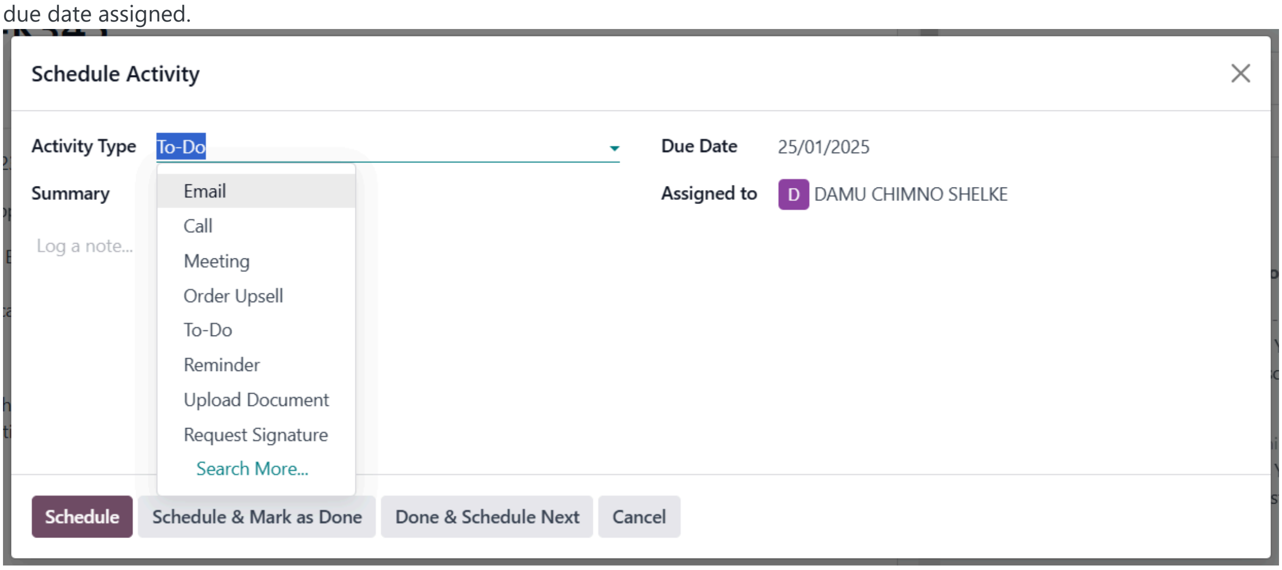
1. **Send Message :** Using this you can directly send an email to any person and followers of the documents directly from Odoo. You can use the expand button, and add a readymade template and attach any files and send to the required person.



2. **Log Note :** This can be used for internal communication or to mention any logs for that particular record. Similar to Send Message, you can attach files or load readymade log templates but it won't send emails or notifications to other people.



3. **Activities :** This can be used to assign any activities to any Odoo User which will be logged in and send reminders as per the due date assigned.

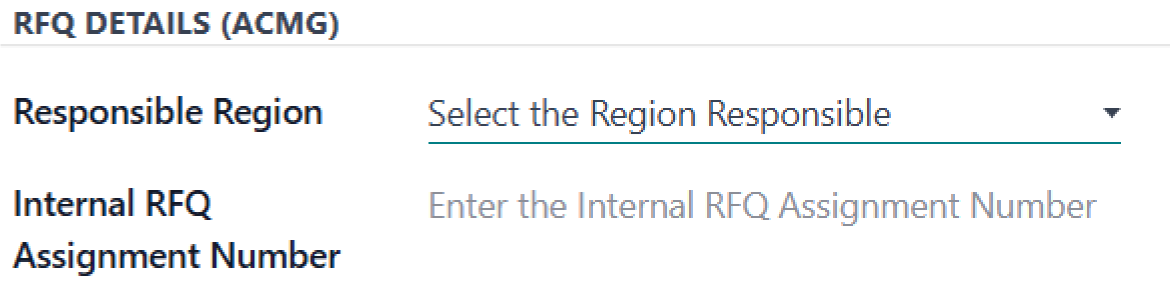


4. **Search Icon :** In Case you need to search for any logs within a particular record you can make use of this.
5. **Attachments :** You can attach any type of documents related to the record by clicking on that icon.
6. **Followers :** If you want any Odoo user to be able to see the record or notify them the updates of the records, you can add them as followers and they will also receive emails and other log notes as well.

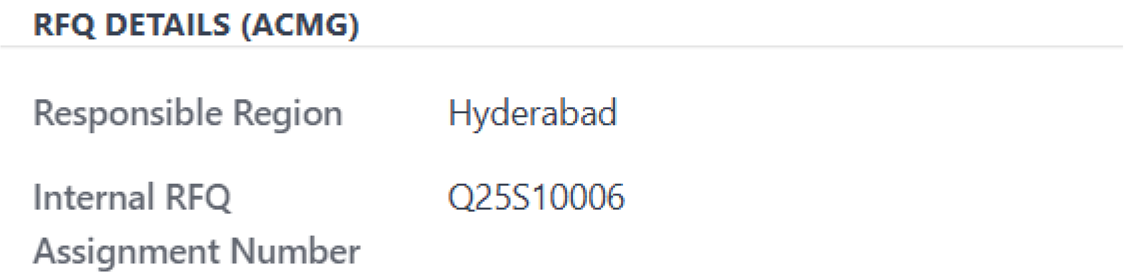
7. **Knowledge :** This is a quick access button to check any type of information saved in the Knowledge Module to quickly view and add any content in the record.
8. **Log Note timing :** Every change and logs is recorded with timings which ensures transparency and traceability of the logs.

9. Automatic Internal RFQ Number Generation :

Under **RFQ Details (ACMG),** when you select the Responsible region, the Internal RFQ Assignment Number (RAN) is automatically generated after saving the record based on the region selected as shown in the ***Pic 2***



Pic 1



Pic 2

> Please note that once you select the region you cannot change the region again and the Number will be assigned as well. Incase you want to change then you have to undo the changes before saving or if you saved and want to change then please contact the ADMINS!

The sequence generated will change according to the ACMG Head selected as well as the Responsible Region as follows :

If ACMG Head = Damu Shelke then the sequence will follow :
"QYYR1XXXX" where :
Q - Quotation
YY - Year (e.g. 25, 26, 27)
R - Region
XXXX - Sequence Number

> Regions are :
>
> AKAI
> AKIC
> Bangalore (S)
> Chennai (S)
> East (E)
> Export (X)
> Hyderabad (S)
> JSR (E)
> North (N)
> West 1 (W)
> West 2 (G)

If ACMG Head = Pankaj Lad then the sequence will follow :
"QYYMMRXXXX" where :
Q - Quotation
YY - Year (e.g. 25, 26, 27)
MM - Month (e.g. 01, 02, 03..... 12)
R - Region
XXXX - Sequence Number

Regions are :

AKAI
AKIC
Bangalore (B)
Chennai (C)
East (E)
Export (X)
Hyderabad (H)
JSR (E)
North (N)
West 1 (M)
West 2 (G)

The sequence number will be reset every year for ACMG 1 whereas sequence numbers for ACMG 2 will be continued as requested.

Hope that was interesting and easy to fill up your RFQ records! Let's go back to "List View" and understand Filters & Group By Functions!