

Create Sales Order to Quotation

Summary	
Module	Universal Function – Line loop
Level	Hard
Requirements	4.0.0.0 or Higher

Scenario

This sample will show you have to copy a Sales Order to a Quotation with all lines and then close the Sales order.

The screenshot shows two SAP windows. The top window is 'Sales Order' and the bottom window is 'Sales Quotation'. Red arrows indicate the data flow: one arrow points from the 'Sales Quotation' button in the top window to the 'Sales Quotation' window, and two arrows point from the item lines in the 'Sales Order' table to the corresponding item lines in the 'Sales Quotation' table.

Sales Order Data:

#	Item Description	Type	Item No.	Medarbejder	Quantity	Unit Price	Discount %	Price after Discount	Total (Doc)	COG...
1	IBM x3400 IBM Serve		x3200		1	6.250,00 DKK	0,00	6.250,00 DKK	837,98 EUR	jh
2	19" rackskab		v20038		1	2.493,75 DKK	0,00	2.493,75 DKK	334,35 EUR	jh

Sales Quotation Data:

#	Item No.	Item Description	Quantity	Price after Discount	Tax Code	Total (Doc)
1	x3200	IBM x3400 IBM Serve	1	6.250,00 DKK	S1	837,98 EUR
2	v20038	19" rackskab	1	2.493,75 DKK	S1	334,35 EUR
3					S1	

Prerequisites for this sample

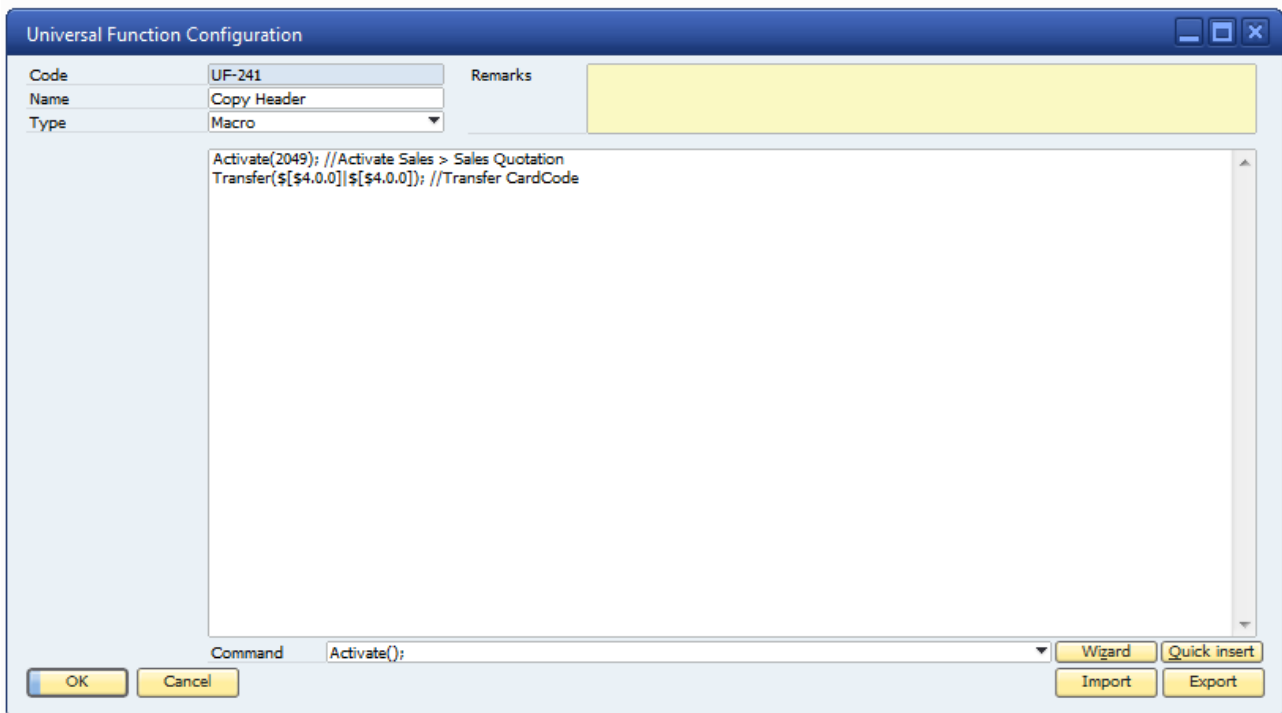
None

Needed Configuration

You will need to create a function buttons: configuration on the Sales Order and 3 x Universal Function Configurations: macros and finally a Universal Function Configurations: Line Loop that will combine it.

Step 1: Opening the sale order.

The first thing we need to do is to create a macro that copies the header data to Sales Quotation.



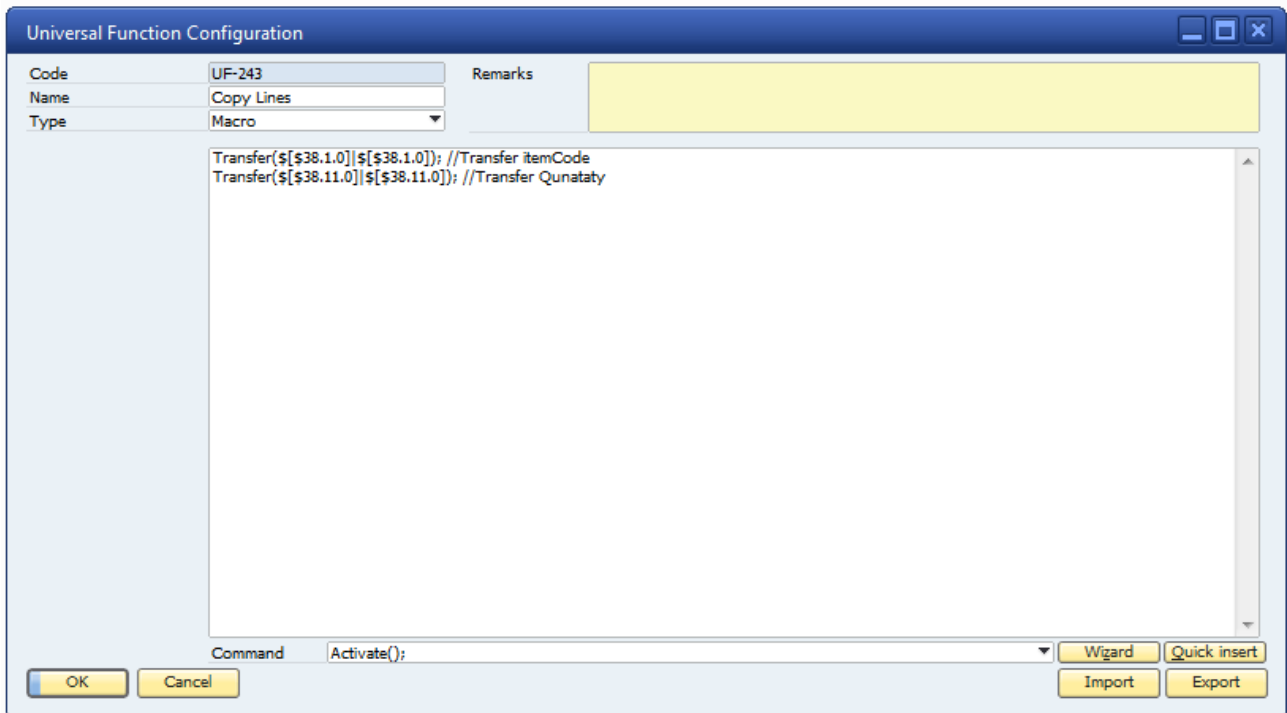
The SQL (for copy/paste):

```
Activate(2049); //Activate Sales > Sales Quotation
Transfer($[$4.0.0]|$[$4.0.0]); //Transfer CardCode
```

Tip: More if needed is possible, but customer code is a minimum.

Step 2: Copy the line data (NOTE: this will not copy text or sub totals)

We now need a macro that will copy the data on line level.



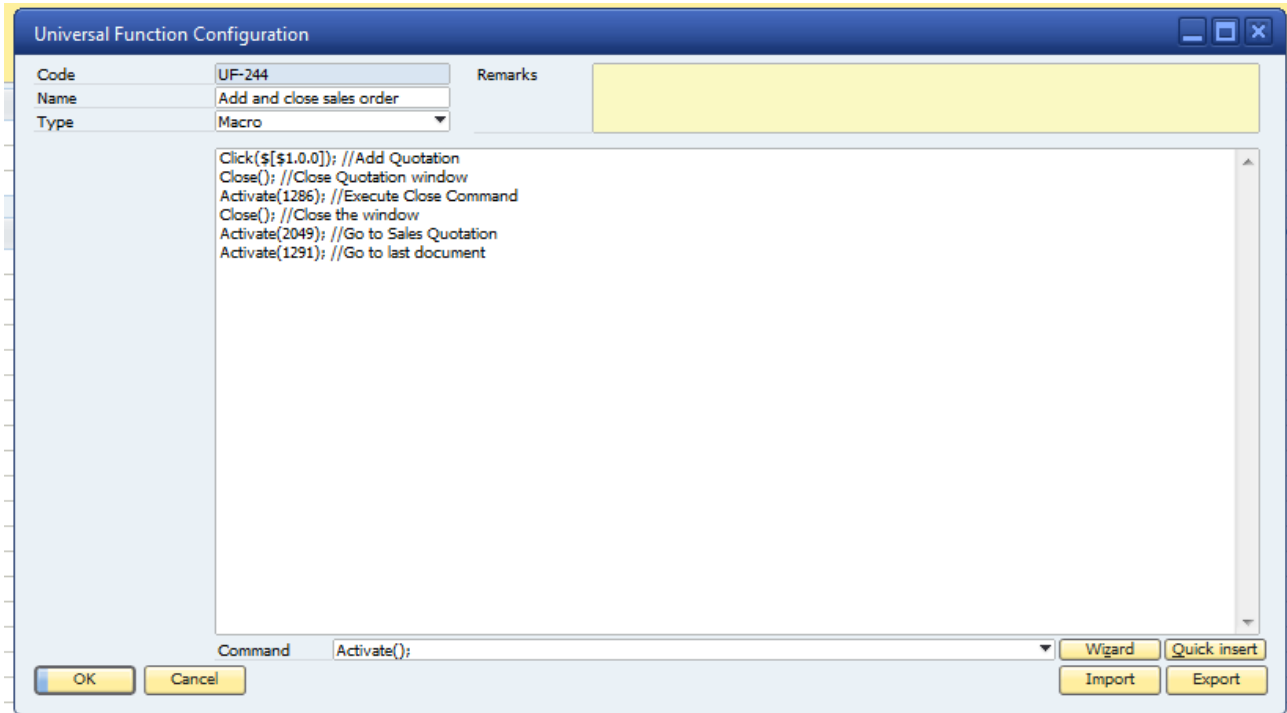
The SQL (for copy/paste):

```
Transfer($[$38.1.0]|$[$38.1.0]); //Transfer itemCode  
Transfer($[$38.11.0]|$[$38.11.0]); //Transfer Qunataty
```

Tip: More if needed is possible, but customer code is a minimum.

Step 3: Add the sales Quotation and close the Sales Order

We now want the Sales Quotation to be added and close the Sales Order. But we also want the macro to open that last added Sale Quotation(NOTE: This will open the last added quotation, so you can't be sure that is the one that we just created as other people may also be adding Quotations) .



The SQL (for copy/paste):

```
Click($[$1.0.0]); //Add Quotation  
Close(); //Close Quotation window  
Activate(1286); //Execute Close Command  
Close(); //Close the window  
Activate(2049); //Go to Sales Quotation  
Activate(1291); //Go to last document
```

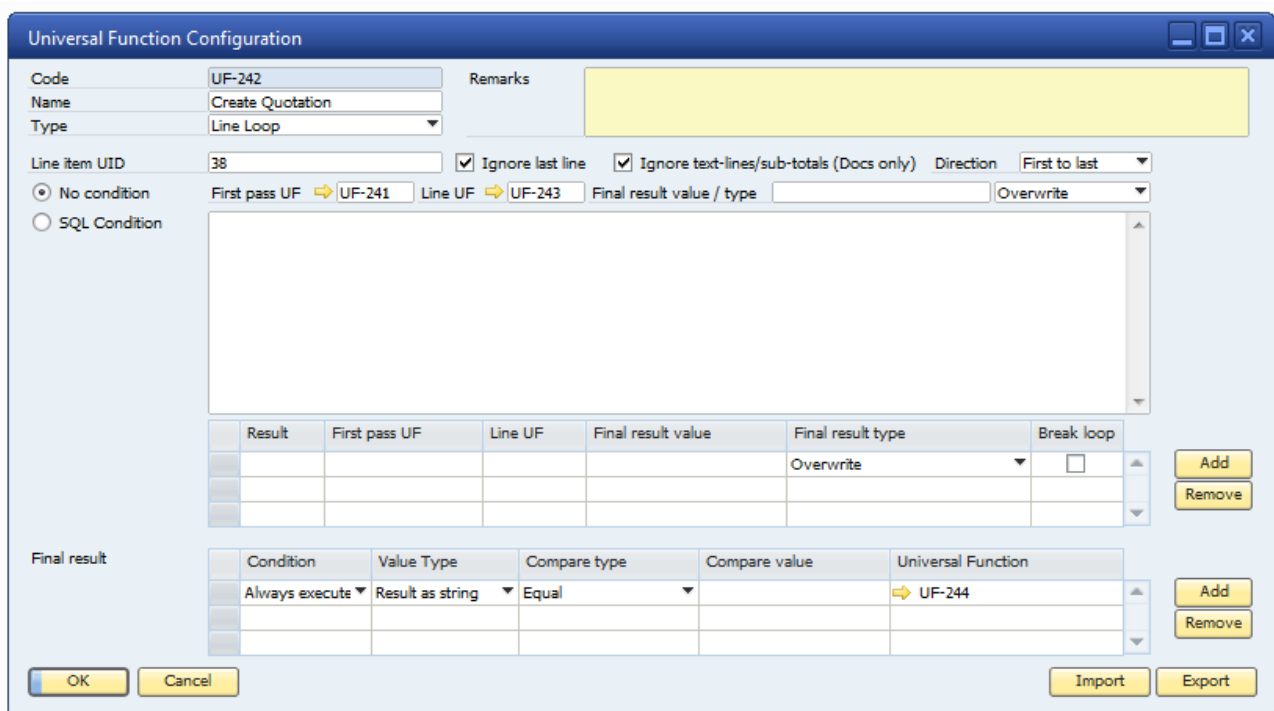
Step 4: Combining all the macros in a line loop.

First thing you need to define is the Item UID of the matrix that holds the lines that you wish to loop. In this case its (Line Item UID = 38). We also need to ignore Last Line and text lines and choose the direction (First to Last). (Hint: press F1, to get the help file to read more about the different things).

The First Pass UF we set to the UF:Copy header config, as we want it executed only when the very first line is found ,after that it is ignored.

Line UF we set to the UF: Copy lines, as we want the loop to copy all the lines from the Sales Order.

Final result we set to last UF: Add and close sales order config. This will execute the step 3



Warning: The line Loop will ignore text lines and sub totals as they are not support by Line Loop

Step 5: Function Button configuration

We set up a simple button that launches the functionality on the Sales Order by linking it to the line loop configuration (UF: Create Quotation, step 4).

Buttons - Configuration

Code: FB-009 Users (Empty = All) [] Include users Exclude users

Formtype: 139

Description: Sales Order

Formwidth: 600 (Use only on sizeable forms)

Formheight: 560 (Use only on sizeable forms)

Buttonwidth: [] (If nothing entered: 100 pixel)

Buttons (Buttons without name is not shown)

	Item	Col.	Iden.	Arguments	Universal Function	
1:	Sales Quotation	<input checked="" type="checkbox"/>	Find	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> OK	Universal Function	UF-242
2:	[]	<input checked="" type="checkbox"/>	Find	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> OK	Formatted Search	[]
3:	[]	<input checked="" type="checkbox"/>	Find	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> OK	Formatted Search	[]
4:	[]	<input checked="" type="checkbox"/>	Find	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> OK	Formatted Search	[]
5:	[]	<input checked="" type="checkbox"/>	Find	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> OK	Formatted Search	[]
6:	[]	<input checked="" type="checkbox"/>	Find	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> OK	Formatted Search	[]
7:	[]	<input checked="" type="checkbox"/>	Find	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> OK	Formatted Search	[]
8:	[]	<input checked="" type="checkbox"/>	Find	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> OK	Formatted Search	[]
9:	[]	<input checked="" type="checkbox"/>	Find	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> OK	Formatted Search	[]
10:	[]	<input checked="" type="checkbox"/>	Find	<input checked="" type="checkbox"/> Add <input checked="" type="checkbox"/> OK	Formatted Search	[]

Active

OK Cancel Import Export