Document Action

- Validation
- Action

Validation

Save:

1. System will check all mandatory fields

2. In the order line, the system will pick the price and tax from the master.

3. If a Custom line is added in the master, it will copy to the customs line under the order line.

4. Payment Schedule will explode as per the payment terms selected in order(Header).

Delete:

1. System will delete the order and its history details

2. If the product is required to delete in the order line and it is in draft status, then you can delete the record.
    If the Document status is in progress, you should change the quantity to zero and prepare the document. then you can delete the record.

3. If you want to delete the whole record, first need to delete the activity against the document number and delete the header.

Document action-prepare:

1. System will check the period details and master data checking

2. If a payment schedule is not created, the system will automatically create a payment schedule based on the payment term selected.

Document action-complete:

1. System will set the status as complete for the document and keep the order ready for processing.

2. Once document action is complete, all fields are updated in read-only

Document action void/reverse correct actual:

1. Void- the system will reverse all the transaction data and change the document status to Void

Document action close:

1. System will check whether all the activity for the document is completed and change the Document status to close.

Action

Verify:

Not applicable

Create lines from:

Not applicable

Copy from/lines:

 This button will help you to copy the order lines from another sales order line. We need to mention the order number to copy it.

<custom actions>:

Not applicable