

Tabs

- Customer PO Header
- Customer PO Line
- PO Line>Custom Fields
- Payment Schedule

Customer PO Header

Home (64) Summary *Customer PO x

Customer PO

Inserted

Client: Organization:

Document No: PO Date:

Target Document Type: Customer PO No:

Description:

Business Partner: Partner Location:

User/Contact: Currency:

Company Agent: Payment Term:

Payment Rule:

Price List:

Total Lines: Grand Total:

Pay Schedule valid Approved
 Approved Level 1 Approved Level 2

Home (64) Summary *Customer PO x

Customer PO

Inserted

Document Status: Document Type:

Delivery

Warehouse: Delivery Via:

Delivery Rule: Freight Category:

Freight Cost Rule: Insurance Category:

Insurance Cost Rule: Packing and Forwarding Category:

Packing and Forwarding Cost Rule:

Reference

Project: Quotation:

Is Ordered

PO line Custom Fields(Line) Payment Schedule Custom Fields

0 Records

Organization	Drawing No	Description	Line	Product	UOM
No Records found					

Critical Fields

1. PO Date: Date of Customer po (It can be PO received date)
2. Customer PO number: Document Number of Customer Po Received
3. Business Partner: We can select existing/new customers here and this field is used to maintain

customer

4. Partner location: This field is updated automatically, based on the business partner
5. Currency: A medium of exchange for goods and services.
6. Company agent: This field is used for sales rep updating purposes, It will display from the employee master when the sales rep field is checked
7. Payment Rule: This field used to select the payment type

7.1 Cash: After receiving the invoice, the customer pays the invoice amount through cash only

7.2 Check: After receiving the invoice, the customer pays the invoice amount through a check

7.3 Credit Card: Payment amount paid to the vendor to use a Credit Car

7.4 Direct Debit: Payment amount paid to direct vendor account number

7.5 Mixed POS Payment

7.6 NEFT

7.7 On Credit

7.8 RTGS: Payment amount paid to RTGS

Critical & onetime setup fields

1. Organization: This Field is used to select the organization
2. Target Document Type- This Field is used to select the type of document that you are going to process

Non-Critical Fields

1. Description: Use to note specifics about document or any other information.
2. User/Contact: This field updates automatically when Business partner selected or you need to create new user in master for particular business partner.
3. Payment term: The terms of payment(immediate ,30 days,etc)
4. Price list: The price list will be selected in the product master once we select the product price list will display automatically and the user can also select manually
5. Warehouse: This field is for Product storage purposes, Select a warehouse where the final product is stored.

6. Delivery Rule: This field helps to select the timing of the delivery

7. Delivery Via: Indicates how the products should be delivered

7.1.Pickup: After the Product is ready to ship, customers will take the product in their own vehicle.

7.2.Delivery: Delivery done by the vendor itself to the customer.

7.3.Shipper: The Shipper indicates the method of delivering products via ship, airplane..etc.

8.Freight Cost Rule: Method for charging flight

8.1 Calculated: We can calculate the freight cost

8.2 Fix price: Fixed the freight cost

8.3 Included in Price: Already included in the product price list

9.Insurance Cost Rule: Method for charging insurance

9.1 Calculated: We can calculate the insurance cost

9.2 Fix price: Fixed the insurance cost

9.3 Included in Price: Already included in the product price list

10.Packing and Forwarding Cost Rule: Method for charging Packing and Forwarding

10.1 Calculated: We can calculate the Packing and Forwarding cost

10.2 Fix price: Fixed the Packing and Forwarding Cost

10.3 included in the price: Already included in the product price list

11.Project: Project- If this order is processed against a project user can tag the project for tracking.

12.Quotation: Using Quotation field we can generate Customer PO with reference of Quotation.

Zoom condition's

1. Sales order

Customer PO Line

Home (64) Summary *Customer PO: 1000038 x

Customer PO > PO line

Inserted

Client: Organization:

Drawing No:

Line:

Product: Attribute Set Instance:

Description:

Quantity: UOM:

UnitPrice: Revision No:

Tax: Discount %:

LineAmount: IGST:

Shipper: Active:

Order Qty: Project:

Custom Fields(Line)

Client	Organization	CustomerPOLine	Custom Columns	Value Column
No Records found				

Criticle

1. Product: To select the product type is item, you can select the multiple product in this line item
2. Quantity: Quantity of Product
3. UOM: The record will populate from product and we can change the UOM manually, if uom conversion for the product.
4. Unit price: The Actual or Unit Price indicates the price for a product in the source currency.
5. Revision No: Revision no
6. Tax: This field is used to select tax either Interstate or intrastate and we can also change the tax.
7. IGST: For IGST details

Non-Critical

1. Attribute Set Instance: This field is for Attributes of product (Example:- Brand,Colour,Specifications)
2. Description: To note specifics about Customer PO line document or any other information.
3. Discount: If any discount for the product to the specif customer to be used
4. Shipper: The Shipper indicates the method of delivering products via ship, airplane..etc.
5. Project: If this order line Product is processed against a project user can tag the project for tracking.

PO Line > Custom Fields

Home (64) Summary *Customer PO: 1000038 ✕

Customer PO > PO line > Custom Fields(Line)

Inserted

Client: Konnect Demo Organization: *

Description:

CustomerPO: 1000053

Custom Columns:

Sequence: 10

Value Column:

CustomerPOLine: -1

Active

Critical Fields

1. Customer PO: It will automatically fetch Customer PO Document Number
2. Custom Column: This is master data. According to user need Custom column masters can be designed.
3. Value Column:- This field is for any Custom Value related to Customer PO Line Document or any other description and specifics.
4. CustomerPoLine: It will automatically fetch Customer PO Line Number

Payment Schedule

Home (64) Summary *Customer PO: 1000038 ✕

Customer PO > Payment Schedule

Inserted

Client: Konnect Demo

Organization: *

PO NUM: 1000053

Payment Schedule: [dropdown]

Active

Due Date: [calendar icon]

Discount Date: [calendar icon]

Amount Due: 0.0

Discount Amount: 0.0

Valid

Validate

Critical Fields

1. Payment Schedule: To update the schedule details for the payment.
2. Due Date: The date when the payment is due
3. Discount Date: Once a discount date is exceeded system does not consider the discount amount.
4. Amount due: Amount of the payment due.
5. Discount Amount: To update the discount amount details.