

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* Konnect Demo

Document No

Target Document Type

Description

Business Partner*

User/Contact

Company Agent*

Payment Rule*

Price List

Total Lines 0.00

Organization*

PO Date

Customer PO No

Partner Location*

Currency* INR

Payment Term Immediate

☐ Pay Schedule valid ☐ Approved

☐ Approved Level 1 ☐ Approved Level 2

Grand Total 0.00

Home (64) Summary *Customer PO x

Customer PO

Inserted

Document Status* Drafted

Document Type* ** New **

Document Action

Delivery

Warehouse

Delivery Rule

Freight Cost Rule

Insurance Cost Rule

Packing and Forwarding Cost Rule

Delivery Via

Freight Category

Insurance Category

Packing and Forwarding Category

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 Card

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 ✕

Customer PO > PO line

Inserted

Client: Konnect Demo Organization: *

Drawing No:

Line: 10

Product: Attribute Set Instance:

Description:

Quantity: 0 UOM:

Unit Price: 0.0 Revision No:

Tax: GST18% Discount %: 0.0

Line Amount: 0.0 IGST: 0.0

Shipper: Project:

Order Qty: 0

Active: ☒

Custom Fields(Line)

0 Records

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 x

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

The screenshot shows a web application interface for managing payment schedules. At the top, there is a navigation bar with tabs: 'Home (64)', 'Summary', and '*Customer PO: 1000038'. Below the navigation bar is a toolbar with various icons for file operations and navigation. The main content area is titled 'Customer PO > Payment Schedule'. The form is divided into two columns. The left column contains fields for 'Client' (Konnect Demo), 'PO NUM' (1000053), 'Payment Schedule' (a dropdown menu), a checked 'Active' checkbox, 'Due Date' (a date field with a calendar icon), and 'Discount Date' (a date field with a calendar icon). The right column contains fields for 'Organization' (a dropdown menu with an asterisk), 'Amount Due' (a numeric field with a currency icon and value 0.0), and 'Discount Amount' (a numeric field with a currency icon and value 0.0). At the bottom of the left column is a 'Validate' button. At the bottom of the right column is a 'Valid' checkbox.

Home (64) Summary *Customer PO: 1000038

Customer PO > Payment Schedule

Inserted

Client Konnect Demo Organization *

PO NUM 1000053

Payment Schedule

☒ Active

Due Date

Discount Date

Validate

Amount Due 0.0

Discount Amount 0.0

☐ Valid

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.