Customer PO

Introduction

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This window is used for purchase orders received from Customer

Customer Purchase Order includes the terms and conditions of the original equipment manufacturer that ultimately purchases Buyer’s product that incorporates the goods or services sold by seller.

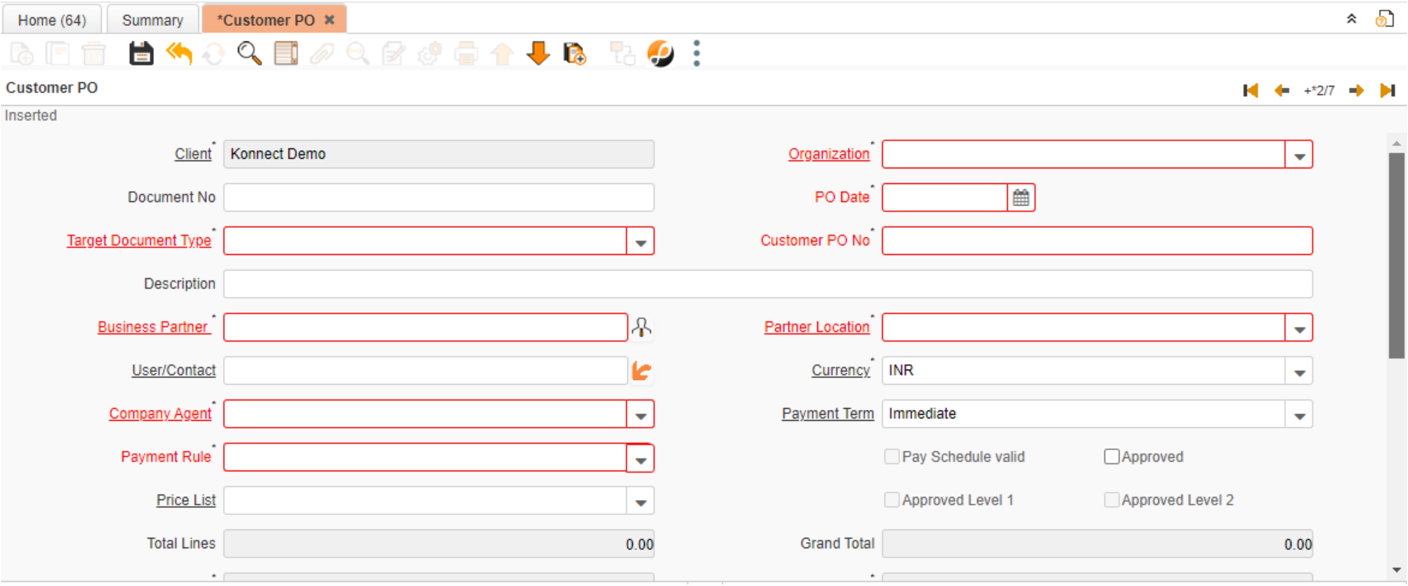
Business Example

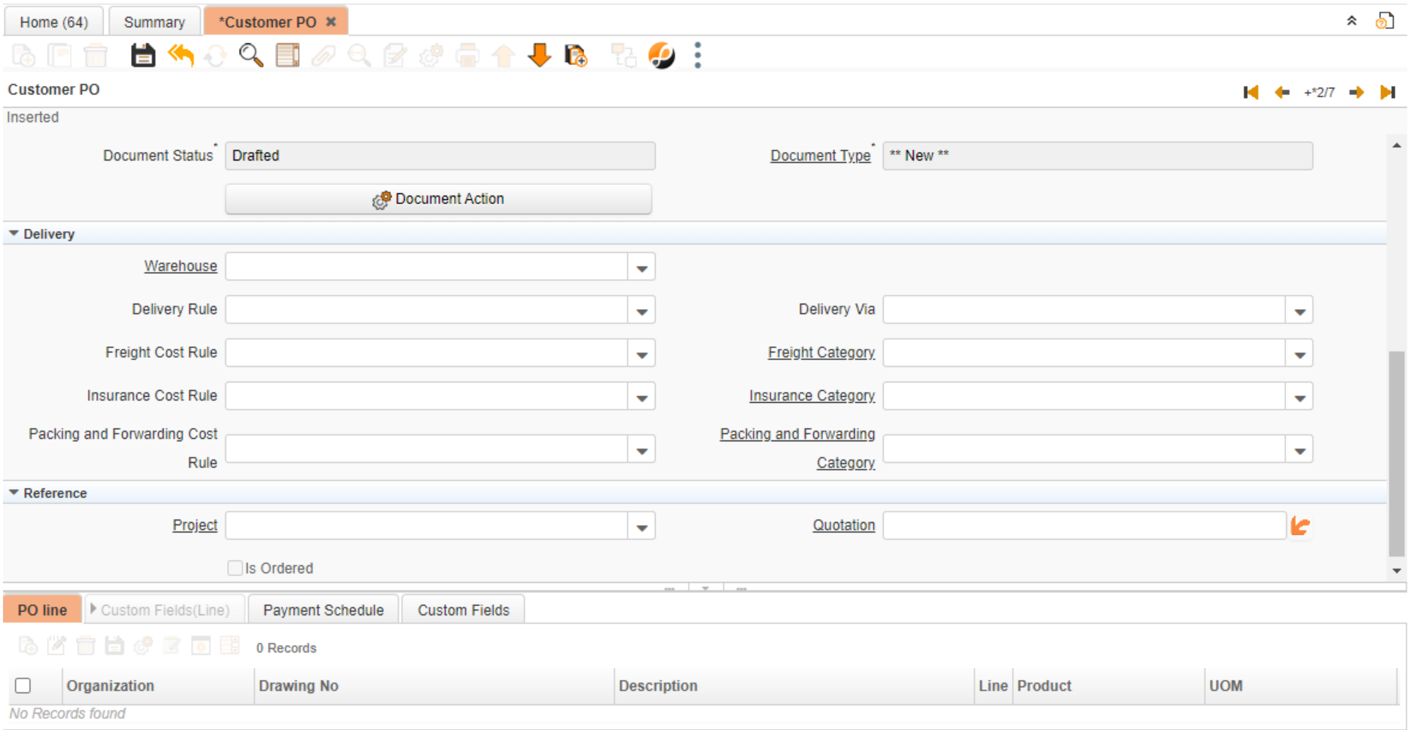
Once Customer purchase order is received sales department can generate Sales order accordingly.

Tabs

Tabs

Customer PO Header





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

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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.

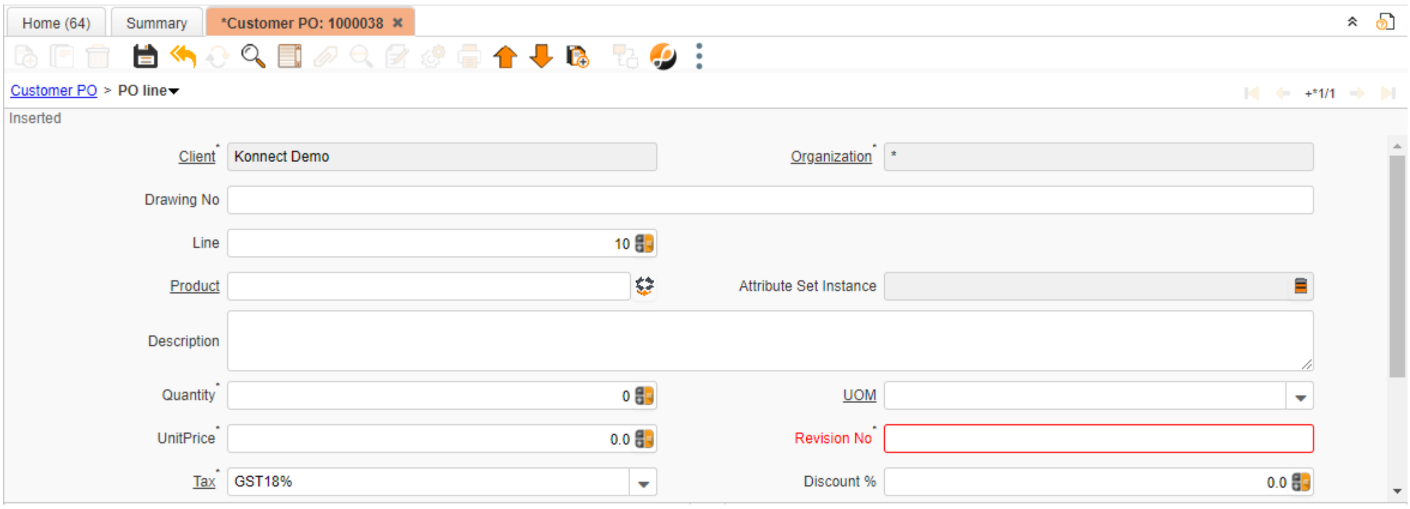
12.Quotation: Using Quotation field we can generate Customer PO with reference of Quotation.

Zoom condition’s

1. Sales order

Tabs

Customer PO Line



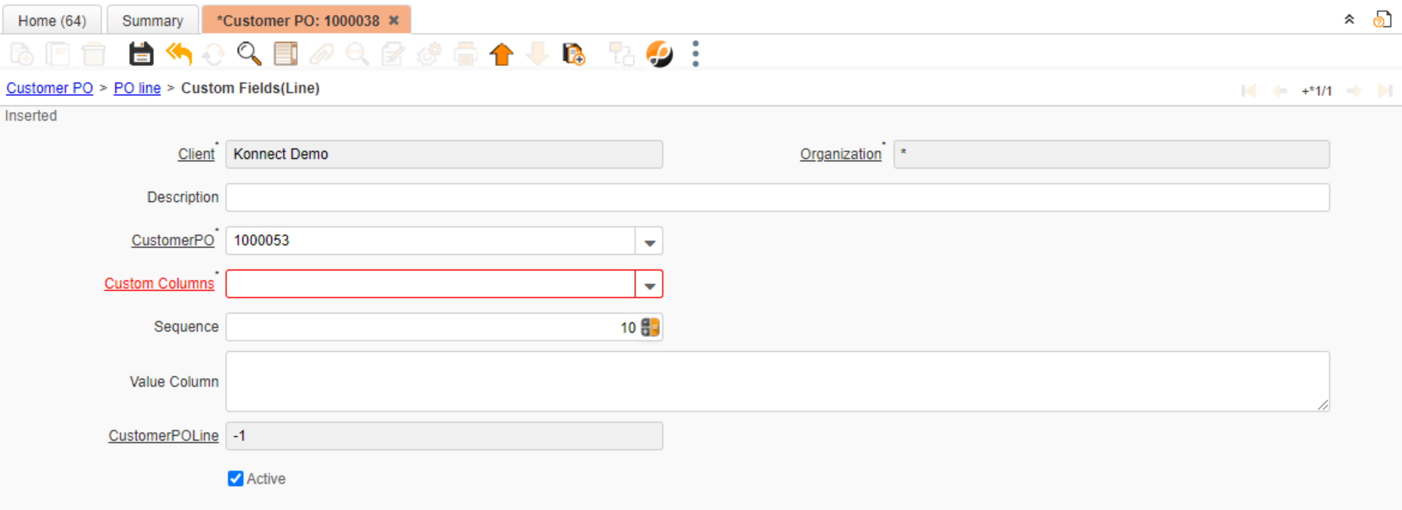
Criticle

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 deatils

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.

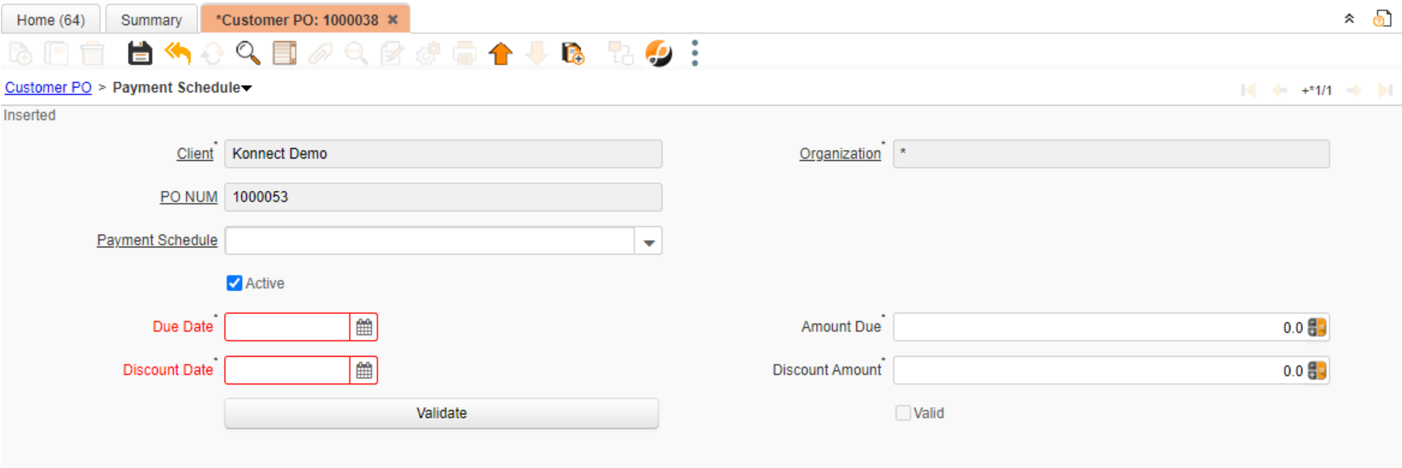
PO Line>Custom Fields



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



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.

Document Actions

Validation

Save

1. System will check all mandatory fields.

Delete

1. System will delete the order and its historical details.

Actions

Document action prepare

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

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

Document action complete

1. System will complete the document and keep the order ready for processing in the Purchase order.

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

Document action void/reverse correct actual

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

Document action close

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

Video

Video

Reports

Reports

Report is well Complied set of data according Scenario

Sr.no	Report Name	Report purpose
1	Customer PO	This report shows Customer PO details using parameters Organization, customer_po_no, drawing_no and PO date

Preceding and Succeeding Window

Customer PO Connected Window

Preceding Window

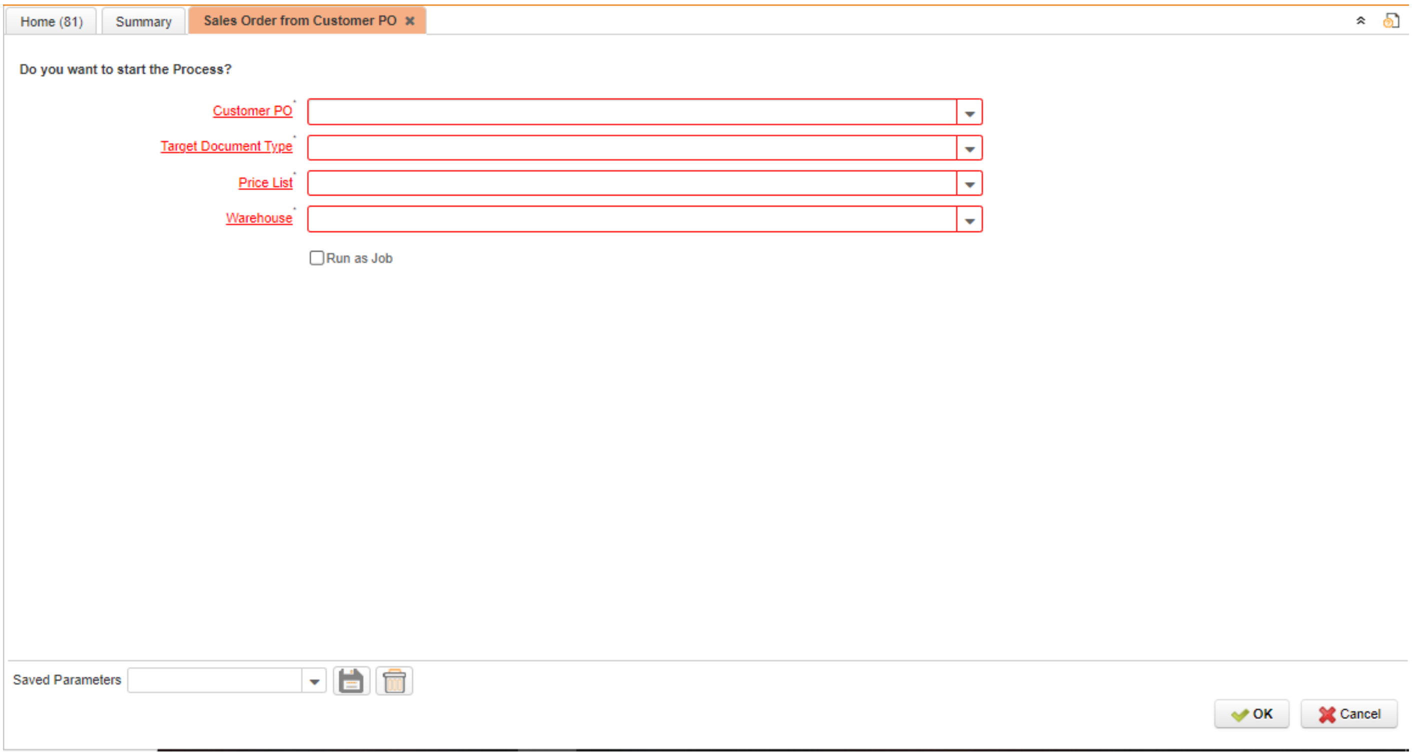
Succeeding Window

Sales Order :- Sales Order

Sales order from customer PO

Forms and Process

Sales order From Customer PO



Parameters :

1. Customer PO :- Drop Down to select Customer PO for which user wants to generate Sales order.
2. Target Document Type :- Drop Down to choose sales order type For e.g (job order, Sales order-job, sales order)
3. Price List :- In a company Price lists are different for domestic and export users. The price lists names be like Purchase INR ,Sales INR and Purchase Euro , Sales Euro.
4. Warehouse :- This field is for Product storage purposes, Select a warehouse where the final product is stored.

Process Use :

The process Sales Order from customer PO is use to generate sales order.