

Introduction

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| Role | <p>The role is the main entry point into Konnect ERP. Roles Determine the following</p> <ol style="list-style-type: none">1) Windows/Reports/Forms Access2) Menu Displayed3) Approval of documents4) Organization access |
| Organization | <p>The organization is mandatory in all windows/data of Konnect ERP, it usually represents a branch/Sister Company.</p> <p>All Transaction data is stored at Org Level. It is available in all reports as a selection.</p> |
| Warehouse/Locator | <p>Warehouse represents the Physical store of goods and items, locators represent Bins/lanes inside a warehouse. At least 1 locator is mandatory for each warehouse. In Konnect ERP we sometimes create virtual warehouses to show virtual demarcation like QC / Shop Floor / Subcontract</p> |
| Business Partner | <p>The Business Partner defines any party with whom you transact. This includes customers, vendors and employees. Konnect ERP User can be created only for Employee Business Partners.</p> |
| Business Partner Group | <p>The Business Partner Group window allows you to define the accounting parameters at a group level. If you specify the accounting parameters for a group any Business Partner created using this group will have these accounting parameters automatically populated. You can then make any modifications necessary at the Business Partner level.</p> |
| Product Category | <p>The Product Category allows you to define different groups of products. These groups can be used to generating Price Lists, defining margins and quickly assigning different accounting parameters for products.</p> |
| Product | <p>The Product Window defines all products used by an organization. These products include those sold to customers, used in manufacturing products sold to customers and purchased by an organization. There are different types of products like Items(physical goods),Services, Resource(Manufacturing Plant/WorkCenters), Asset(Used in Fixed Assets)</p> |

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| Document Status | <p>Each Transaction Data(Sales Order/Purchase Order/Invoice) has a document status.</p> <p>Draft - The document is saved</p> <p>In-Progress - The document is under Progress</p> <p>Completed - The document is posted and available for further process</p> <p>Closed - Document is posted and closed - No Further Change is possible</p> <p>In-Valid - There are errors in the Document and requires correction</p> <p>Void/Reversed - The document has been reversed and cannot be edited</p> |
| Document Action | <p>Document Action is the process that navigates the document from one status to another</p> <p>Prepare - Draft to In-Progress</p> <p>Complete - Draft/In-Progress to Completed</p> <p>Void/Reverse Correct it - Completed/Draft/In-Progress to Void/Reversed</p> <p>Re-Activate - Completed to In-Progress</p> |
| Document Type | <p>The Document Type Window defines any document to be used in the system. Each document type provides the basis for the processing of each document and controls the printed name and document sequence(Document No) used.</p> |
| Manufacturing Resource | <p>Maintain your Plant and work centre Resources. The product for the resource is automatically created and synchronized. Update the Name, Unit of Measure, etc. in the Resource and don't change it in the product.</p> |
| Chart of Accounts | <p>The Account Element Window is used to define and maintain the Accounting Element and User Defined Elements. One of the account segments is your natural account segment (Chart of Account).</p> <p>You may add a new account element for parallel reporting or user-defined accounting segments.</p> |
| Price List | <p>The price List contains the list of all Products that are purchased or Sold. Different Price Lists can be assigned to different Business Partner groups. It is also time-dependent, so you have to track Price History in the system</p> |
| Workflow Activities | <p>Pending Approvals for the logged-in user</p> |

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