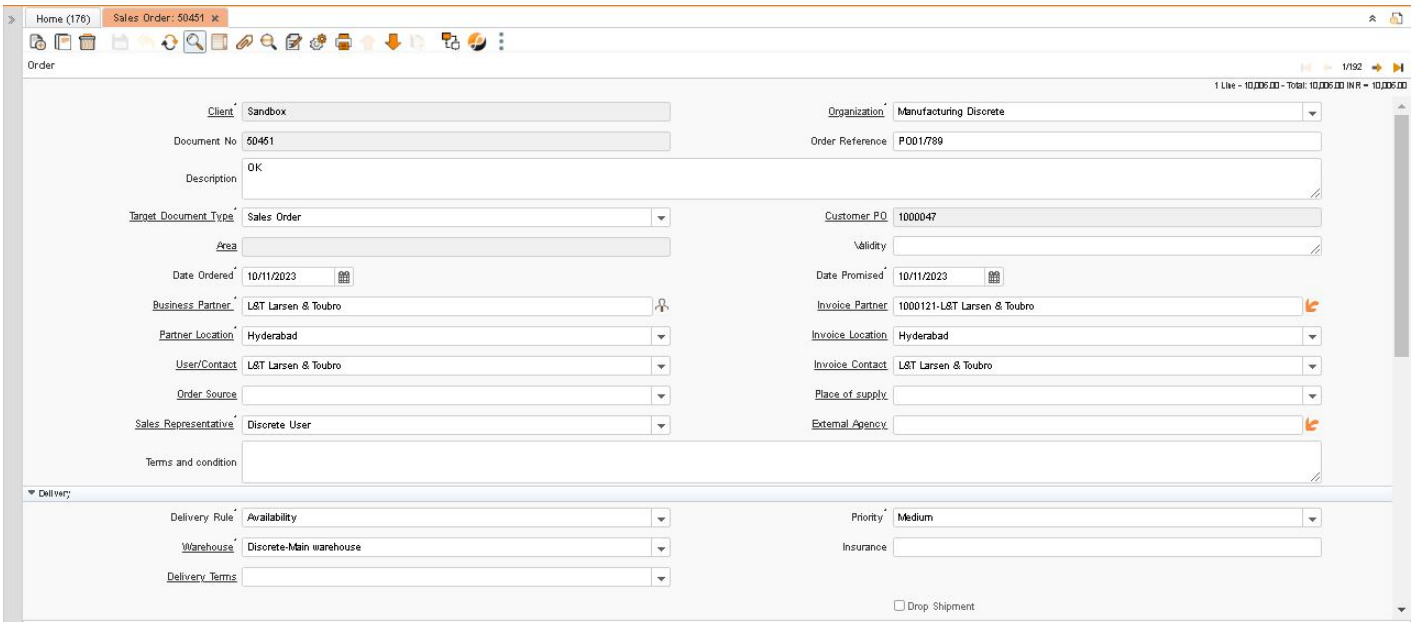
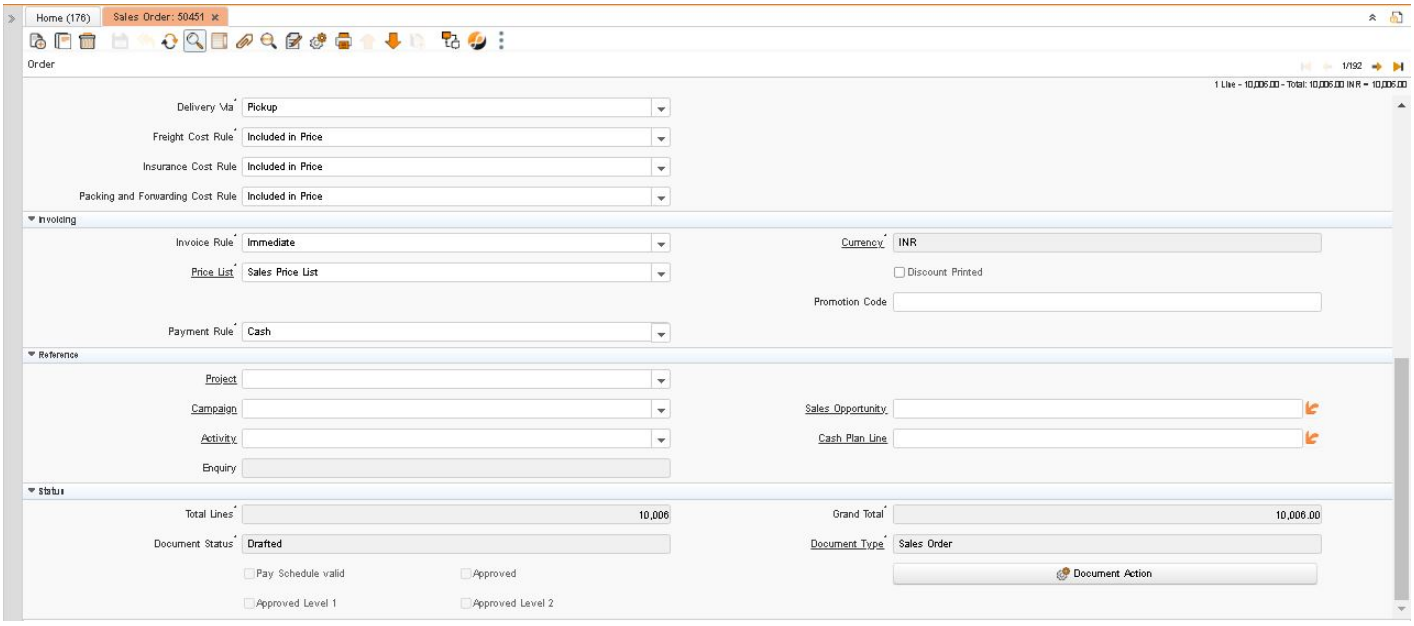
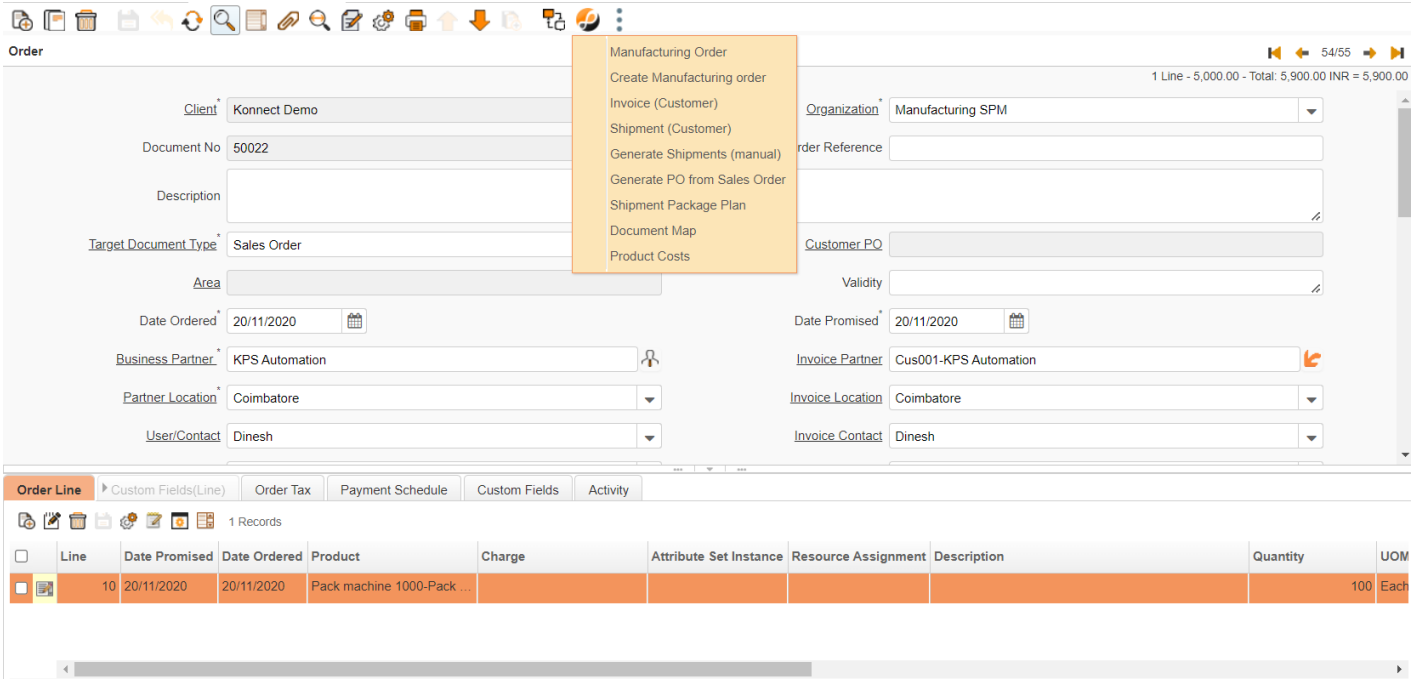
Tabs

- Sales Order Header
- Sales order line
- Order tax
- Payment schedule
- Custom fields
- Activity

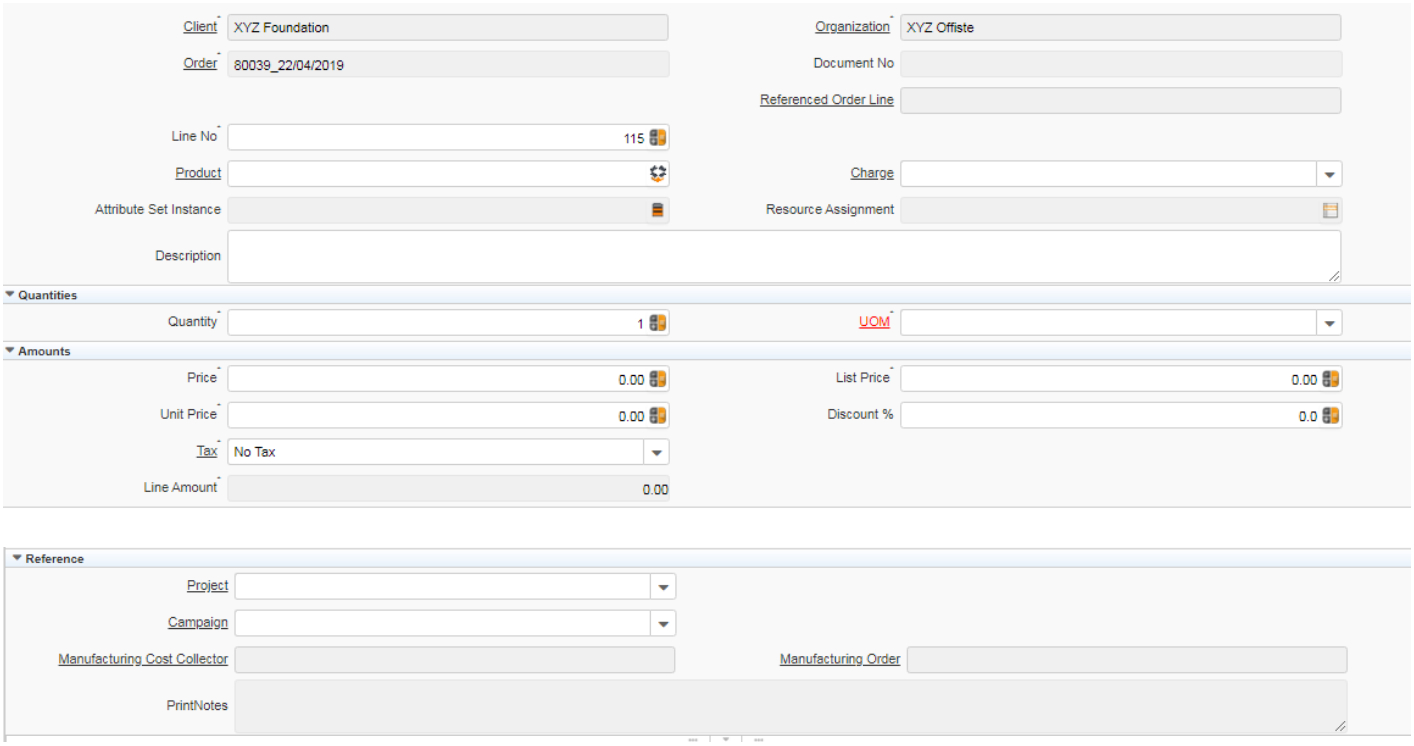
Sales Order Header






Order
Manufacturing Order
Create Manufacturing order
Invoice (Customer)
Shipment (Customer)
Generate Shipments (manual)
Generate PO from Sales Order
Shipment Package Plan
Document Map
Product Costs
54/55
1 Line - 5,000.00 - Total: 5,900.00 INR = 5,900.00
Client
Konnect Demo
Organization
Manufacturing SPM
Document No
50022
Description
Target Document Type
Sales Order
Customer PO
Area
Validity
Date Ordered
20/11/2020
Date Promised
20/11/2020
Business Partner
KPS Automation
Invoice Partner
Cus001-KPS Automation
Partner Location
Coimbatore
Invoice Location
Coimbatore
User/Contact
Dinesh
Invoice Contact
Dinesh
Order Line
Custom Fields(Line)
Order Tax
Payment Schedule
Custom Fields
Activity
1 Records
Line
Date Promised
Date Ordered
Product
Charge
Attribute Set Instance
Resource Assignment
Description
Quantity
UOM
10
20/11/2020
20/11/2020
Pack machine 1000-Pack ...
100
Each

Sales order line



Critical Fields:

1. Product: To select the product type item, you can select the multiple products in this line item

2. Quantity: Quantity that needs to be quoted

3. UOM: The record will populate from the product and we can change the UOM manually if uom conversion for the product.

4. Tax: This field is used to select tax either Interstate or intrastate and we can also change the tax.

5. Charge: additional document charge to add this field

6. Discount: If any discount for the product to the specific customer to be used

Critical & one-time setup fields:

Non-Critical Fields:

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

2. Campaign: It is used to select the campaign type

Serial number/Lot number (ASI):

In this field, we can set an Attribute instance for this product & we do not generate serial numbers in the sales order

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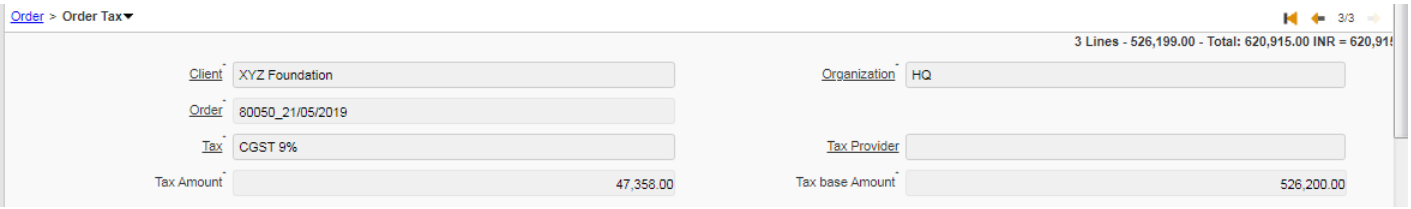
Zoom conditions:

Customization:

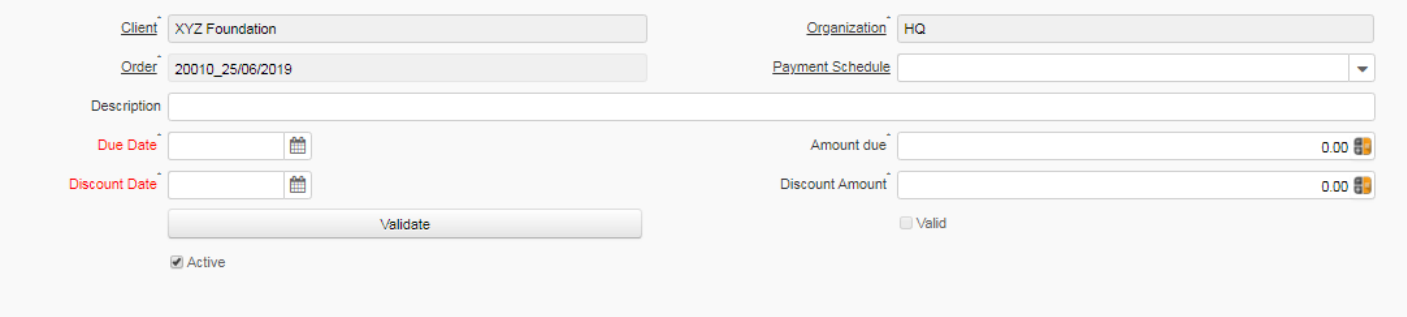
1. In Sales Order Line, the Product Search option in the Process button, helps to search the product by a combination of Attributes that we already configured in the Product search configuration window(KA_COPY_CUSTOM_PRODUCT - use this configuration to copy custom fields from the Product window).

Order tax



Once the document is completed order tax tab automatically update

Payment schedule



Critical Fields:

1. Payment Schedule: To update the schedule details

2. Due Date: The date when the payment is due

3. Discount Date: Once the 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

Critical & one-time setup fields:

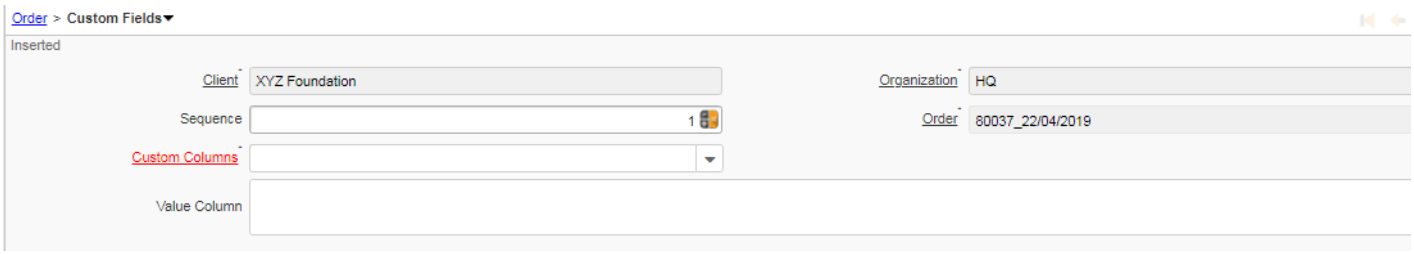
Non-Critical Fields:

Zoom conditions:

Validation:

System check total value and payment schedule value

Custom fields



Critical Fields:

1. Sequence: Method of ordering records (lowest number comes first)

2. Custom columns: Additional field used for reporting purposes

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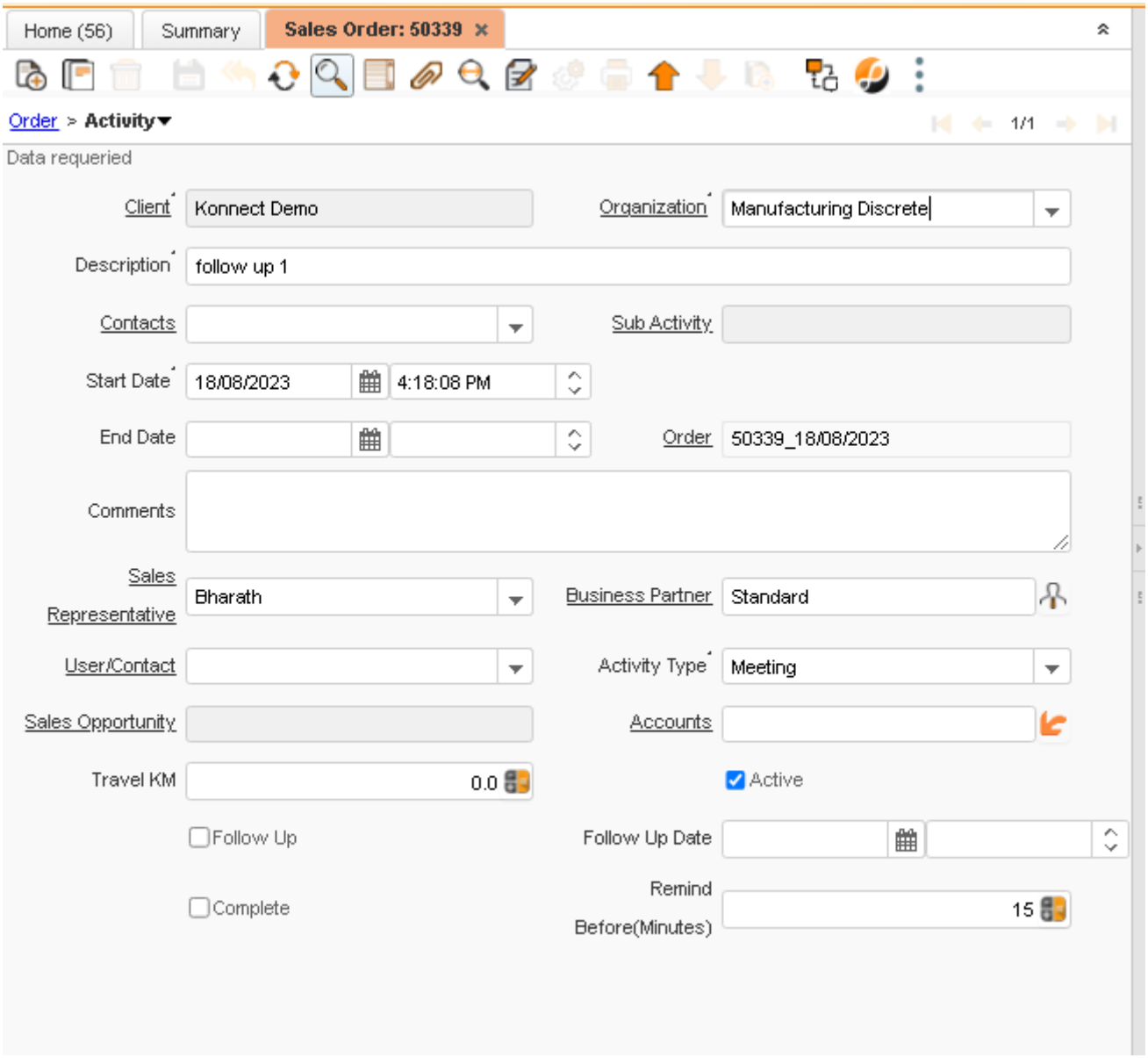
Critical & one-time setup fields:

Non-Critical Fields:

Zoom conditions:

Customization:

Activity



Critical Field :

1. Contacts : Used to select the contact from master
2. Start Date : It is used to give the Activity start date
3. End Date : It is used to give the Activity end date
4. Sales Representative : It is used to select the sales rep for this activity
5. User Contact : Used to select the User contact from this Activity

6. Activity Type : Used to select the activity type like E-Mail, Meeting, Online Meeting, Phone Call, Task
7. Travel KM : Used to maintain Travel kilometer
8. Follow Up : This Check box is used to Mention if the follow up is required or not
9. Complete : This check box is used to maintain the activity is completed or not
10. Follow Up Date : Used to mention the follow up date
11. Remind Before : Used to mention the Remind Before time

Non-Critical Field :

1. Description : Used to give the extra details about the activity
2. Comments : Used to maintain any comments about the Activity