

Tabs

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

Home (178) Sales Order: 50451 x

Order

1 Live - 10,006.00 - Total: 10,006.00 IN R - 10,006.00

<u>Client</u>	Sandbox	<u>Organization</u>	Manufacturing Discrete
<u>Document No</u>	50451	<u>Order Reference</u>	P001789
<u>Description</u>	OK		
<u>Target Document Type</u>	Sales Order	<u>Customer PO</u>	1000047
<u>Area</u>		<u>Validity</u>	
<u>Date Ordered</u>	10/11/2023	<u>Date Promised</u>	10/11/2023
<u>Business Partner</u>	L&T Larsen & Toubro	<u>Invoice Partner</u>	1000121-L&T Larsen & Toubro
<u>Partner Location</u>	Hyderabad	<u>Invoice Location</u>	Hyderabad
<u>User/Contact</u>	L&T Larsen & Toubro	<u>Invoice Contact</u>	L&T Larsen & Toubro
<u>Order Source</u>		<u>Place of supply</u>	
<u>Sales Representative</u>	Discrete User	<u>External Agency</u>	
<u>Terms and condition</u>			

▼ Delivery:

<u>Delivery Rule</u>	Availability	<u>Priority</u>	Medium
<u>Warehouse</u>	Discrete-Main warehouse	<u>Insurance</u>	
<u>Delivery Terms</u>			

☐ Drop Shipment

Home (178)
Sales Order: 50451 x

Order

1 Line - 10,006.00 - Total: 10,006.00 IN R - 10,006.00

Delivery Via: Pickup

Freight Cost Rule: Included in Price

Insurance Cost Rule: Included in Price

Packing and Forwarding Cost Rule: Included in Price

Invoicing

Invoice Rule: Immediate

Price List: Sales Price List

Payment Rule: Cash

Currency: INR

Discount Printed

Promotion Code

Reference

Project

Campaign

Activity

Enquiry

Sales Opportunity

Cash Plan Line

Status

Total Lines: 10,006

Document Status: Drafted

Pay Schedule valid

Approved

Approved Level 1

Approved Level 2

Grand Total: 10,006.00

Document Type: Sales Order

Document Action

Order

Client: Organization:

Document No: Invoice Reference:

Description:

Target Document Type: Customer PO:

Area:

Date Ordered: Date Promised:

Business Partner: Invoice Partner:

Partner Location: Invoice Location:

User/Contact: Invoice Contact:

Validity:

1 Line - 5,000.00 - Total: 5,900.00 INR = 5,900.00

Order Line | Custom Fields(Line) | Order Tax | Payment Schedule | Custom Fields | Activity

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

Client	XYZ Foundation	Organization	XYZ Offsite
Order	80039_22/04/2019	Document No	
		Referenced Order Line	
Line No	115		
Product		Charge	
Attribute Set Instance		Resource Assignment	
Description			

Quantities	
Quantity	1
UOM	

Amounts	
Price	0.00
Unit Price	0.00
Tax	No Tax
Line Amount	0.00
List Price	0.00
Discount %	0.0

Reference	
Project	
Campaign	
Manufacturing Cost Collector	
Manufacturing Order	
PrintNotes	

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

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

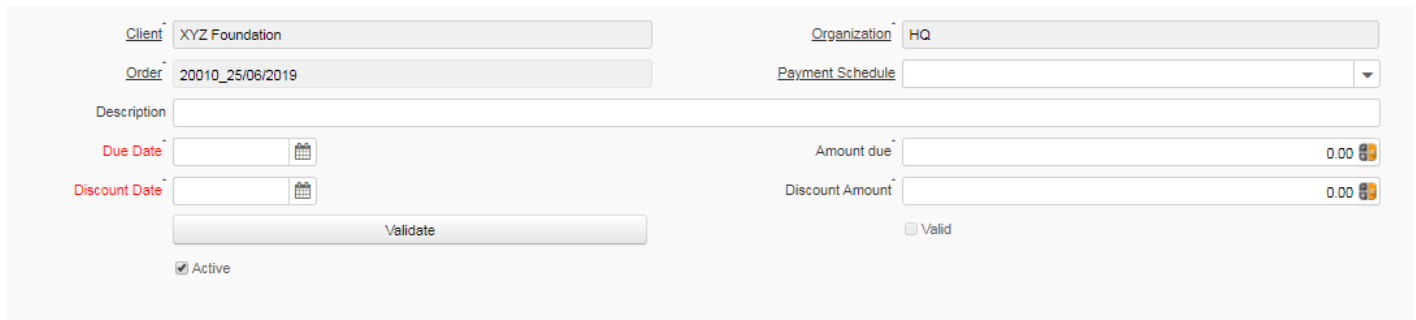
[Order](#) > Order Tax▼

3 Lines - 526,199.00 - Total: 620,915.00 INR = 620,915.00

Client	XYZ Foundation	Organization	HQ
Order	80050_21/05/2019	Tax Provider	
Tax	CGST 9%		
Tax Amount	47,358.00	Tax base Amount	526,200.00

Once the document is completed order tax tab automatically update

Payment schedule



The screenshot shows a web form for creating or editing a payment schedule. It includes fields for Client (XYZ Foundation), Organization (HQ), Order (20010_25/06/2019), and Payment Schedule (a dropdown menu). There is a Description field, Due Date and Discount Date fields with calendar icons, and Amount due and Discount Amount fields with currency symbols and values of 0.00. A Validate button and an Active checkbox are also present.

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

Order > Custom Fields ▾

Inserted

Client	XYZ Foundation	Organization	HQ
Sequence	1 	Order	80037_22/04/2019
Custom Columns			
Value Column			

Critical Fields:

1. Sequence: Method of ordering records (lowest number comes first)
 2. Custom columns: Additional field used for reporting purposes
-

Critical & one-time setup fields:

Non-Critical Fields:

Zoom conditions:

Customization:

Activity

Home (56) Summary **Sales Order: 50339** x

Order > Activity 1/1

Data requeried

Client Konnect Demo Organization Manufacturing Discrete

Description follow up 1

Contacts Sub Activity

Start Date 18/08/2023 4:18:08 PM

End Date Order 50339_18/08/2023

Comments

Sales Representative Bharath Business Partner Standard

User/Contact Activity Type Meeting

Sales Opportunity Accounts

Travel KM 0.0 ☒ Active

☐ Follow Up Follow Up Date

☐ Complete Remind Before(Minutes) 15

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