

# Sales order

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# Introduction

## Overview

After receiving the Purchase order from the customer, the Marketing team will generate the sales order

## Business Case

A manufacturing Industries receives a Purchase order from a customer for the product. The Marketing team will release the sales order. it is used fully for internal document reference purposes.

# Tabs

## Tabs

# Sales Order Header

Home (176)
Sales Order: 50451

Order

Client

Sandbox

Document No

50451

Description

OK

Target Document Type

Sales Order

Area

Date Ordered

10/11/2023

Business Partner

L&T Larsen & Toubro

Partner Location

Hyderabad

User/Contact

L&T Larsen & Toubro

Order Source

Sales Representative

Discrete User

Terms and condition

Organization

Manufacturing Discrete

Order Reference

P001789

Customer P.O

1000047

Validity

Date Promised

10/11/2023

Invoice Partner

1000121-L&T Larsen & Toubro

Invoice Location

Hyderabad

Invoice Contact

L&T Larsen & Toubro

Place of supply

External Agency

1 Line - 10,000.00 - Total: 10,000.00 IN R = 10,000.00

▼ Delivery

Delivery Rule

Availability

Warehouse

Discrete-Main warehouse

Delivery Terms

Priority

Medium

Insurance

☐ Drop Shipment

Home (176)
Sales Order: 50451

Order

1 Line - 10,006.00 - Total: 10,006.00 INR - 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:

Summary

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	
Line No	115	Referenced Order Line	
Product		Charge	
Attribute Set Instance		Resource Assignment	
Description			

Quantities			
Quantity	1	UOM	

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

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:**

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### **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:**

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### **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).

Tabs

# Order tax

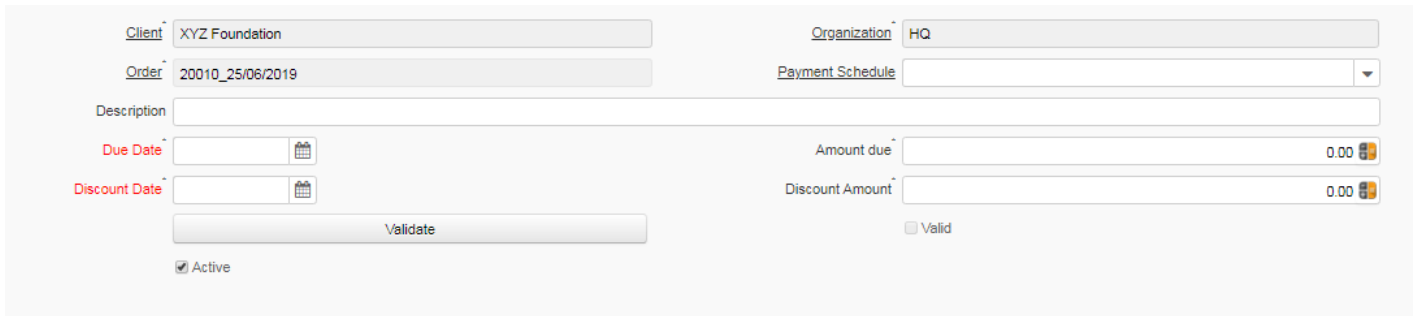
Order > Order Tax▼

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

Client	XYZ Foundation	Organization	HQ
Order	80050_21/05/2019		
Tax	CGST 9%	Tax Provider	
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 managing payment schedules. It includes input fields for Client (XYZ Foundation), Organization (HQ), Order (20010\_25/06/2019), and a dropdown for Payment Schedule. There is a Description field, Due Date and Discount Date fields with calendar icons, Amount due and Discount Amount fields with currency symbols and values of 0.00, a Validate button, and checkboxes for Active and Valid.

## 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

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## Critical & one-time setup fields:

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## Non-Critical Fields:

---

## **Zoom conditions:**

---

## **Validation:**

System check total value and payment schedule value

Tabs

# 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 requiered

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

# Document Actions

# Validation

## **Save:**

1. System will check all mandatory fields
  2. In the order line, the system will pick the price and tax from the master.
  3. If a Custom line is added in the master, it will copy to the customs line under the order line.
  4. Payment Schedule will explode as per the payment terms selected in order(Header).
- 

## **Delete:**

1. System will delete the order and its history details
  2. If the product is required to delete in the order line and it is in draft status, then you can delete the record.  
  
If the Document status is in progress, you should change the quantity to zero and prepare the document. then you can delete the record.
  3. If you want to delete the whole record, first need to delete the activity against the document number and delete the header.
- 

## **Document action-prepare:**

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

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

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## **Document action-complete:**

1. System will set the status as complete for the document and keep the order ready for processing.

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

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## **Document action void/reverse correct actual:**

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

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## **Document action close:**

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

# Action

## **Verify:**

Not applicable

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## **Create lines from:**

Not applicable

---

## **Copy from/lines:**

This button will help you to copy the order lines from another sales order line. We need to mention the order number to copy it.

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## **<custom actions>:**

Not applicable

# Process



# Order Process

The screenshot displays the SAP Order Process interface. At the top, there are navigation tabs: Home (339), Summary, and Sales Order: 50108. Below the tabs is a toolbar with various icons. The main area is divided into two sections: Order Header and Order Line.

**Order Header:** This section contains various fields for order details. A context menu is open over the 'Process' button, showing options: Copy Lines, Product\_Search, AddDefaultItems, Create lines from, Digital Signature, Generate Discount, and Document Action. The fields include:

- Client: Konnect Demo
- Document No: 50108
- Description:
- Target Document Type: Sales Order
- Area:
- Date Ordered: 09/06/2022
- Business Partner: IRAA RESOURCES CO
- Partner Location: Coimbatore
- User/Contact: IRAA RESOURCES
- Organization: Manufacturing Discrete
- Order Reference:
- Customer PO:
- Validity:
- Date Promised: 09/06/2022
- Invoice Partner: 1000066-IRAA RESOURCES CO
- Invoice Location: Coimbatore
- Invoice Contact: IRAA RESOURCES

**Order Line:** This section shows a table with 1 record. The table has columns: Line, Date Promised, Date Ordered, Product, Charge, Attribute Set Instance, Resource Assignment, Description, Quantity, and UOM.

Line	Date Promised	Date Ordered	Product	Charge	Attribute Set Instance	Resource Assignment	Description	Quantity	UOM
10	09/06/2022	09/06/2022	Pack machine 1000-Pack ...				Make-To-Order Manufacturing Order : 80303	23	Each

- 1) **Copy Lines:** Copy lines process will help you to copy the sales order lines from any sales order.
- 2) **Product\_Search:** In the sales Order Header, 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.
- 3) **Add DefaultItems:** The charges will add automatically which are already configured in the master.
- 4) **Generate Discount:** This will help you to add discounts for all products under the order line Tab.

# Order Line Process

Home (340) Summary Sales Order: 50119 ✕ Purchase Order: 800183 ✕

Order > Order Line

5 Lines - 58,800.00 - Total: 58,800.00 INR = 58,800.00

Client\* Konnect Demo

Order\* 50119\_21/11/2022

Business Partner Rohit pvt Ltd

Date Promised 30/12/2022

Line\* 50

Product SKF 6205 2Z-C3-BEARING-BALL BEARING-METAL SHIELD- SKF 62

Attribute Set Instance

Description

Organization\* Manufacturing Discrete

Document No

Referenced Order Line

Partner Location\* Nashik

Date Ordered 21/11/2022

Warehouse\* Ambad WHS

Charge

Resource Assignment

Custom Fields(Line)

0 Records

Sequence	Custom Columns	Value Column
No Records found		

- 1) **Create manufacturing order:** You should Select the Plant, warehouse, BOM, and Routing and enter the order qty to create a manufacturing order from the sales order.
- 2) **Copy Custom:** This will help you to copy the custom records from the products master to insert in the custom fields(Line)
- 3) **Product\_Search:** This helps to search the product by a combination of Attributes that we already configured in the Product search configuration window.

# Video

Video

# Order Videos

# Reports

Sr.No	Report Name	Report Purpose
1.	Open Quotation Report	A quotation will be released as per the company standard in the fabrication industry. The marketing team needs to track how many Quotation not converted to order
2.	Order Status report	In the manufacturing Industry management person want to see the total tracking detail from the sales order against invoice detail. This report is used to track the details.
3.	Sales To Production report	In the manufacturing industry once the sales order is raised and the production process is started. Management needs to track the orders raised and the delivery status against the sales order this report is used to track the details.
4.	Shipment Report	In the manufacturing Industry management person want to see the total tracking detail from a sales order or shipment(Customer) against invoice detail. This report is used to track the details.
5.	Open Sales Order Summary	This report will help you with orders not fully delivered.
6.	Order Vs Dispatched Value	You can see the shipment value delivered with the order Price.
7.	Order Detail	To see the product, qty, Price, and delivered qty against the sales order.



# New Page

# Preceding and Succeeding Window



# Sales Order Connected Window

## Preceding Window

Quotation :- [Quotation](#)

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## Succeeding Window

Manufacturing Order :- [Manufacturing Order](#)

Create Manufacturing Order :-

Invoice (Customer) :- [Invoice \(Customer\)](#)

Shipment (Customer) :- [Shipment \(Customer\)](#)

Generate Shipment (Manual) :-

Generate PO From Sale Order :-

Shipment Package Plan :- [Shipment Package Plan](#)

# Forms and Process

# Generate PR From Sales Order

Home (57)

Summary

Generate PR from Sales Order x

⌵

📄

**Create Purchase Order from Sales Orders**

After completing sales orders, you can create purchase requisition for each sales order. A purchase requisition can reference one or more sales orders (i.e. consolidation of sales orders). The Organization of the Sales Order is used to create the purchase requisition. Once the process is run, you need to synchronize the SO/PR manually (e.g. in case of additional lines and changed lines (product & quantity)).

Organization

▼

Date Ordered

📅

📅

Business Partner

👤

Order

🔍

☐ Run as Job

Saved Parameters

▼

💾

🗑️

✔ OK

✖ Cancel

## Parameters :

1. Organization : This parameter is used to select the Organization name from the master which is used to create sales order.
2. Date Ordered : This is also a parameter which is used to select the date for generate PR
3. Business Partner : Here we can select the Business partner name for the PR.

4. Order : It is used to select the Sales Order Number , by selecting sales order we can create PR from that.

## **Process Use :**

By Using this process we can create the Purchase requisition from sales order for same product and Quantity.

# Generate PO From sales order

» Home (114) Summary **Generate PO from Sales Order** ✕

**Create Purchase Order from Sales Orders**  
After completing sales orders, you can create one or more purchase orders for each sales order. A purchase order references always only one sales order (i.e. no consolidation of sales orders). The Organization of the Sales Order is used to create the Purchase Order. If a (default) PO document type is defined on Organization level, that is used instead of the document types defined on Client level. POs are created for all sales order lines where the product has a current vendor, the vendor has a Vendor Price List with all Products on the most current Price List Version. The Unit of Measure is copied, PO and SO can have different currencies. Once the process is run, you need to synchronize the SO/PO manually (e.g. in case of additional lines and changed lines (product & quantity)).

Date Ordered  To

Business Partner

Vendor  ▼

Order

Drop Shipment  ▼

☐ Run as Job

Saved Parameters  ▼

## Parameters :

- 1) Date ordered : It is used to filter sales order transaction from date to to date.
- 2) Business partner : It is used to select the business partner details which is mentioned in sales order document.
- 3) Vendor : It is used to select supplier details to raise purchase order.
- 4) Order : It is used to mention the sales order document no.
- 5) Drop shipment : It is used to select yes or no.

---

## Process Use :

By using this process we can be able to generate purchase order from sales order.

# Short Close Order

Home (80)

Summary

Short Close Order x

Do you want to start the Process?

Order

☐ Run as Job

Saved Parameters

Start

Cancel

## Parameters :

**Sales Order** :- Sales order Document No which user wants to short close can choose through this field.

## Process Use :

This process is used to Short close Sales order. Once sales order is short closed Order quantity becomes zero and also Reserve quantity in inventory report for that warehouse.

# Estimation

Home (112) Summary Estimation x

Client Sandbox

Document No 1000003

Business Partner Component Engineering

Sales Price List Sales Price List

Currency Type Company

Expected Close Date 08/02/2023 12:00:00 AM

Marketing Campaign

Description

Sales order

Currency INR

Total cost 10245.11

Cost In Currency 10245.11

Amount 9830.34

Margin -414.77

Organization Manufacturing SPM

Purchase Price List Purchase Price List

Limit Base Fixed Price

Comments

Sales representative Mohammed

Manufacturing cost 3410.02

Material Cost 5985.89

Admin Cost 849.40

Other cost 0.00

Home (112) Summary Estimation x

Main

Estimation Line

Document No 1000003

Select	Line no	Product	Attributes	UOM	Description	Warehouse	Quantity	Price	Limit Base	Purchase Price List
<input type="checkbox"/>	10	80103699_Charging		NUMBERS		SPM Main wareh	1.00		Standard Price	Purchase Price L

## Parameters :



- 1) Organization : It is used to select the organization name.
- 2) Business partner : It is used to select the business partner name.
- 3) Sales price list : It is used to mention the sales price INR.
- 4) Purchase price list : It is used to mention Purchase price INR.
- 5) Currency Type : It is used to select the Currency type.
- 6) Expected close date : It is used to mention the expected close date for the estimation.
- 7) Marketing campaign : It is used to select the campaign type.
- 8) Limit Base : It is used to select price whether it is fixed price or list price.
- 9) Description : It is optional field to mention the description.
- 10) Comments : It is optional field to mention the comments.
- 11) Sales Representative : It is used to select the sales representative name.
- 12) Currency : It is used to select the currency INR or USD.
- 13) Total cost : System will display the total cost.
- 14) Manufacturing cost : System will display the manufacturing cost
- 15) Cost in currency : system will display the cost in currency
- 16) Material cost : system will display the cost of the material
- 17) Amount : system will display the amount
- 18) Admin cost : system will display the admin cost
- 19) Margin : system will display the margin cost by calculating

20) Other cost : system will display the other cost

21) Shipping cost : system will display the shipping cost

22) Line no : user have to mention the line no

23) Product : It is used to mention the product (Component) for calculating estimation.

24) Attributes : user have to select the attributes in this field

25) UOM : Product unit of measurement will be displayed

26) Warehouse : user have to mention the warehouse in this field.

## **Form Use :**

# Reopen Order

Home (2111)

Reopen Order ✕

Sales Order: 50364 ✕

Manufacturing Order: 80785 ✕

Purchase Order: 800444 ✕

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📄

Open previously closed Order

Order \*

⌵

☐ Run as Job

Saved Parameters

⌵

📁

🗑️

✔ Start

✕ Cancel

## Parameter : -

1. Order : User needs to choose order number which is closed previously.

## Process Use :-

This process is used to Open previously Closed orders.

# RePrice Order/Invoice

Home (2111)

RePrice Order/Invoice ✕

⌵

📄

Recalculate the price based on the latest price list version of an open order or invoice

Order

▼

Invoice

▼

☐ Run as Job

Saved Parameters

▼

📁

🗑️

✓ OK

✗ Cancel

## Parameters :-

1. Order :- Order to be selected for which user wants to Recalculate the price based on the latest price list version of an open order
2. Invoice :- Invoice to be selected for which user wants to Recalculate the price based on the latest price list version of an open invoice.

## Process Use :-

This process is used to Recalculate the price based on the latest price list version of an open order or invoice.

# Order Batch Process

Home (34) Order Batch Process

**Process Orders in Batch**  
Based on the selection criteria, the orders are processed using the document action selected. Make sure that the document action is valid for the documents.

Target Document Type \*

Document Status \*

Business Partner

Self-Service

Delivered

Invoiced

Date Ordered To

Document Action \*

☐ Run as Job

Saved Parameters

OK Cancel

Target document line : User have to select the document line.

Document status: User have to select the document status

Business partner: User have to select the business partner type.

Self Service: User have to select self service

Delivered: User have to select the delivery option

Invoiced: User have to select the invoiced option

Data ordered: user have to mention the date order as per the document.

Document action: User have to select the document status.

While the user click the OK button System will generate the order as per the above criteria.