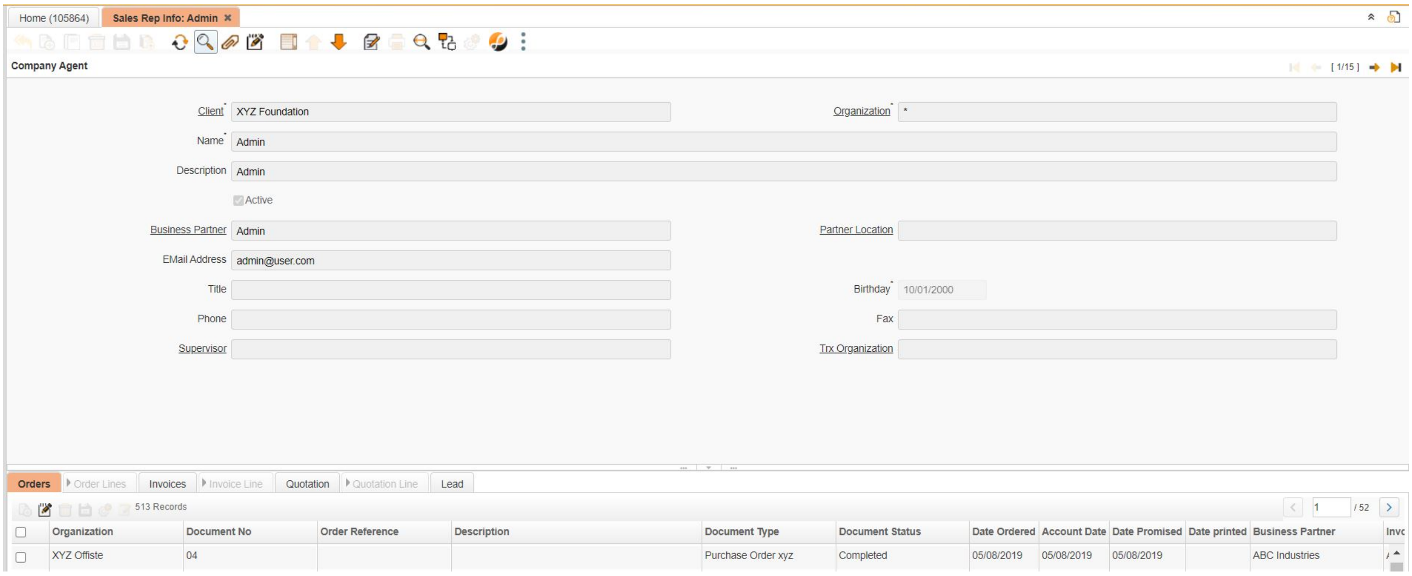
Tabs

- Company Agent
- Order
- Order > Order Line
- Invoice
- Invoice > Invoice Line
- Quotation
- Quotation > Quotation line
- Lead

Company Agent



Critical Fields

1. Name - It will Displays the name of the sales representative
2. Business Partner - It displays the company name of the Sales Rep
3. Partner Location - It displays the company Location of the sales rep
4. Email Address - It displays the Email Address of the Sales rep
5. Birthday - It displays the Birth date of the sales rep
6. Supervisor - It displays the Supervisor Name of the sales rep

Critical & onetime setup fields

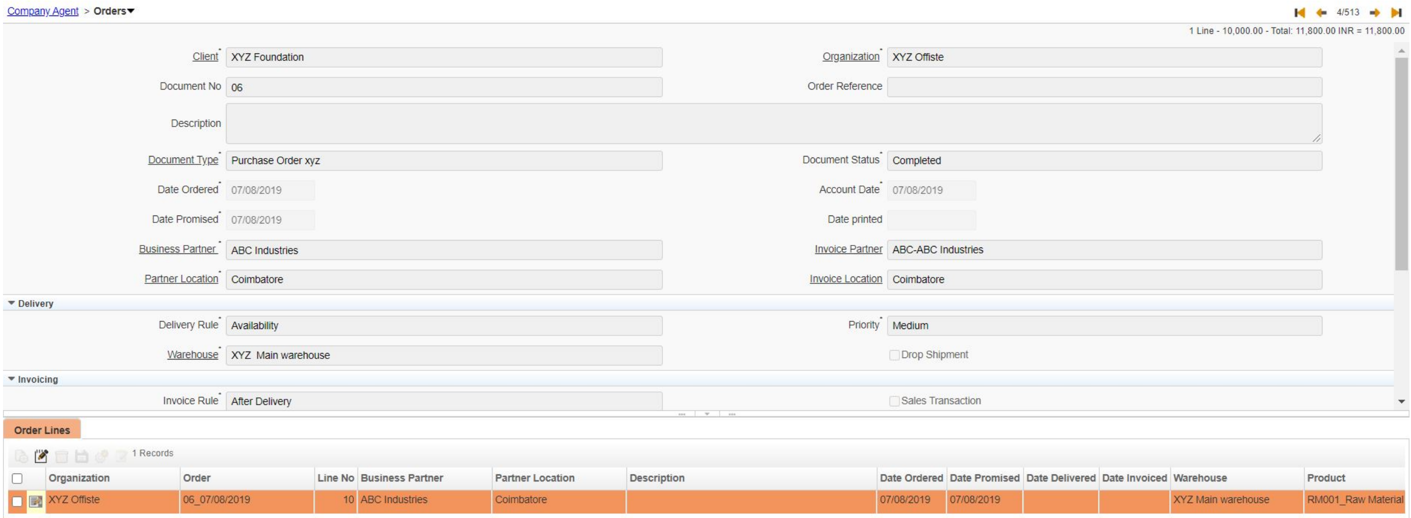
1.Organization:This Field is used to select the organization

Non-Critical Fields

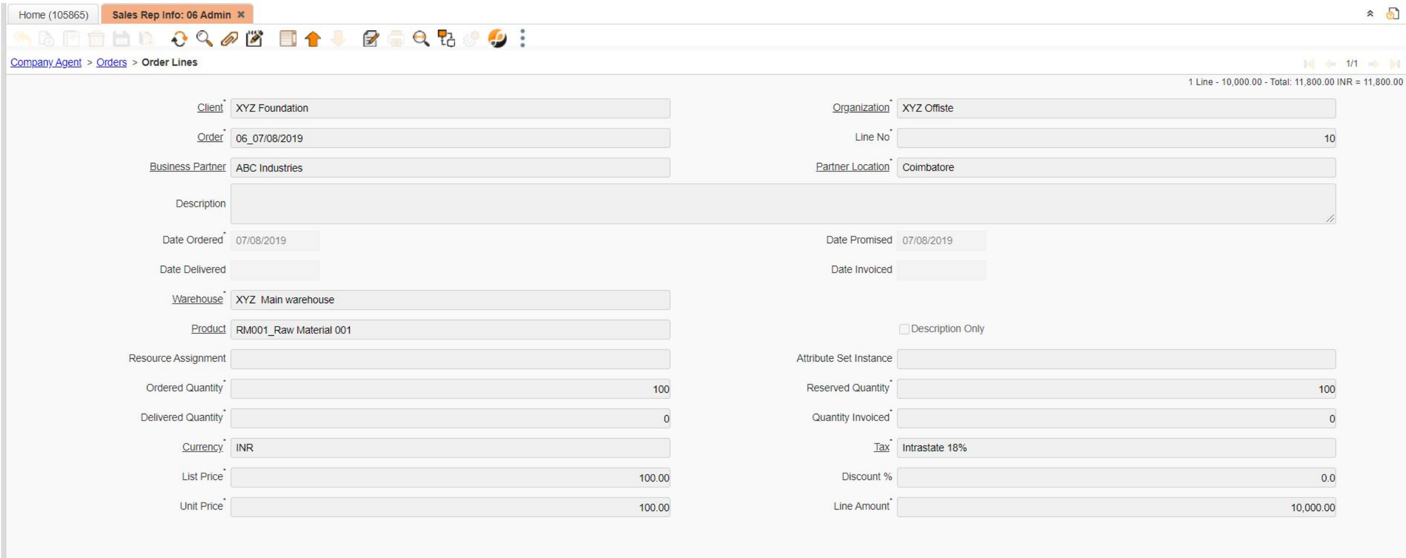
Zoom condition’s

Customization

Order


Company Agent > Orders
4/513
1 Line - 10,000.00 - Total: 11,800.00 INR = 11,800.00
Client XYZ Foundation
Organization XYZ Offiste
Document No 06
Order Reference
Description
Document Type Purchase Order xyz
Document Status Completed
Date Ordered 07/08/2019
Account Date 07/08/2019
Date Promised 07/08/2019
Date printed
Business Partner ABC Industries
Invoice Partner ABC-ABC Industries
Partner Location Coimbatore
Invoice Location Coimbatore
Delivery
Delivery Rule Availability
Priority Medium
Warehouse XYZ Main warehouse
Drop Shipment
Invoicing
Invoice Rule After Delivery
Sales Transaction
Order Lines
1 Records
Organization Order Line No Business Partner Partner Location Description Date Ordered Date Promised Date Delivered Date Invoiced Warehouse Product
XYZ Offiste 06_07/08/2019 10 ABC Industries Coimbatore 07/08/2019 07/08/2019 XYZ Main warehouse RM001_Raw Material

Order > Order Line



Critical Fields

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

2.Quantity : Quantity which needs to be quoted

3.UOM: The record will populate from 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 specif customer to be used

Critical & onetime setup fields

Non-Critical Fields

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

2. campaign:

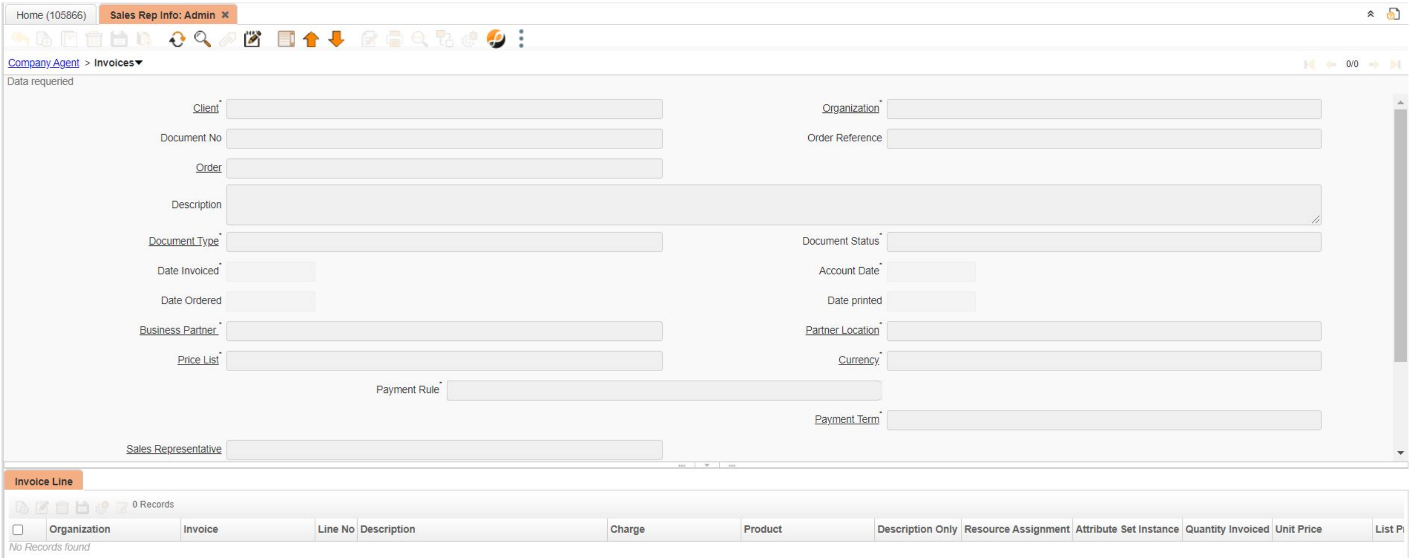
Serial number/Lot number (ASI)

In this Field we can set Attribute instance for this product & we not generate serial number in sales order

Zoom condition’s

Customization

Invoice



Critical Fields

1.Business Partner: We can select existing/new customer here and this field used to maintain the customer

2.Partner location: This field is update automatically ,based on business partner selection, and also update location manually

3.Price list: Price list will be selected in product master once we select the product price list will display automatically and user also select manually

4.Payment Rule:This field used to select the payment type

4.1 Cash: After receiving the invoice, customer pay the invoice amount through cash only

4.2 Check: After receiving the invoice, customer pay the invoice amount through check

4.3 Credit Card:Payment amount pay to vendor to use Credit Card

4.4 Direct Debit:Payment amount pay to direct vendor account number

4.5 Mixed POS Payment

4.6 NEFT

4.7 On Credit

4.8 RTGS: Payment amount pay to RTGS

5.Payment term:The terms of payment(immediate ,30 days,etc)

6.Sales representative :This field update automatically based on system login through user name

7.Order : Once sales or shipment document number select and save the document this field is update automatically

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 the document that you are going to process

Non-Critical Field

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

2.Campaign:

3.Place of supply

Serial number/Lot number (ASI

Zoom condition’

1.Shipment customer

2.Sales order

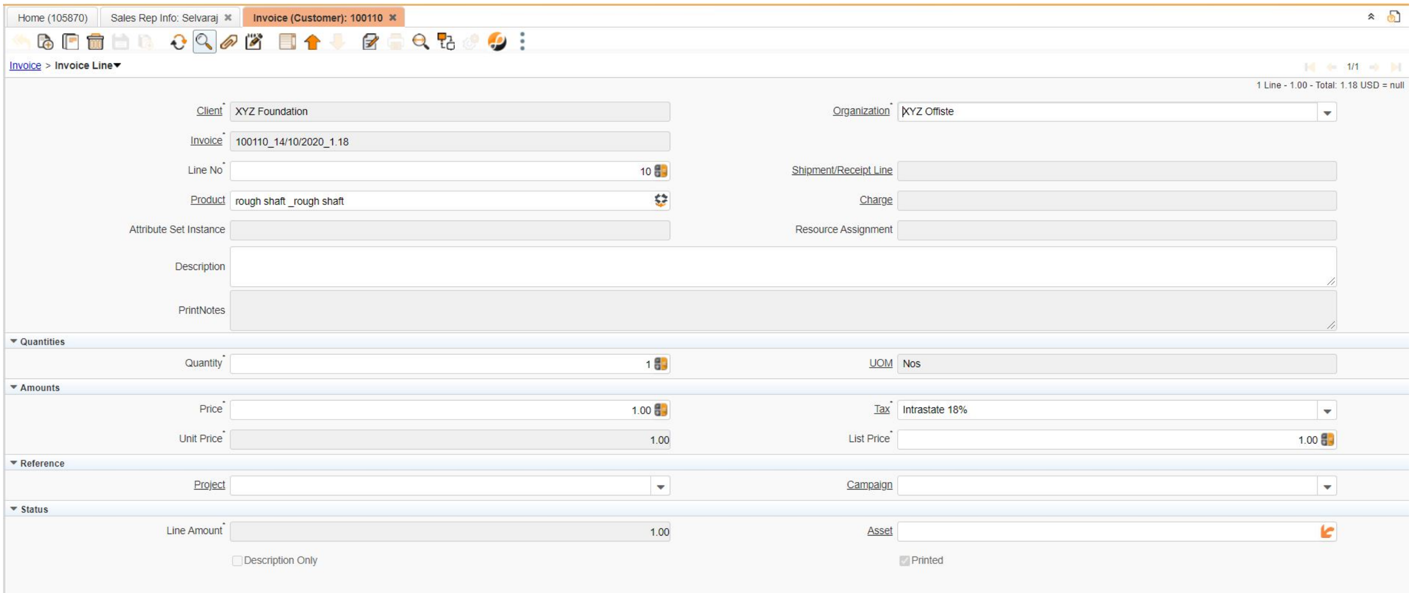
3.Payment

4.Service request

5.View TDS

Customization

Invoice > Invoice Line



Critical Fields

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

2.Quantity : Quantity which needs to be invoice

3.Charge: additional document charge to add this field

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

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

6.Price :This field is update automatically when product select or update manually

Critical & onetime setup fields

Non-Critical Fields

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

2.Campaign:

3.Unit price

4.List price

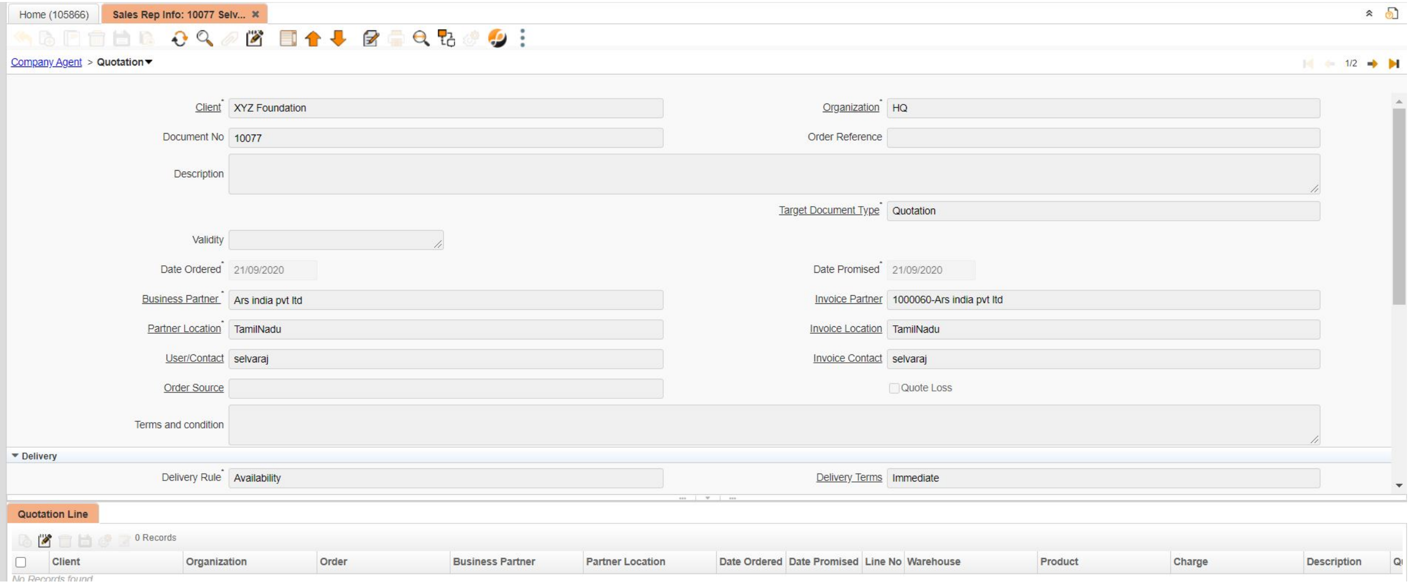
Serial number/Lot number (ASI)

If product against attribute is update ,system will be displayed

Zoom condition’s

Validation

Quotation



Critical Fields

1) Business Partner: We can select existing/new customer here and this field used to maintain customer who sale the Quotation

2.Partner location: This field is update automatically ,based on business partner selection, and also update location manually

3.Warehouse: Product storage purpose ,Select a warehouse were the final product are stored.

4.Date promised: Estimated delivery date of the product to the customer

5.Price list: Price list will be selected in product master once we select the product price list will display automatically and user also select manually.

6.Sales Representative :This field used for sales rep updating purpose ,the regard will display from employee master when sales rep field is checked

7.Terms and condition: This field used for our internal terms and condition updating purpose

(Payment terms etc)

8.Delivery Terms : To update the Delivery Terms (By Air, By courier,etc)

9.1) After Receipt: It requires the order to be paid for before the shipment will be created.

9.2) Availability: This will ship goods as they come into stock, regardless of whether there will be outstanding quantities for the order or not.

9.3) Complete Line: This will generate shipments whenever stock to fulfil any individual order line is available.

9.4) Complete Order: This will create a shipment when the stock to fulfil the entire order is available.

9.5) Force: This will cause a shipment to be generated for the full quantities specified in the order, regardless of whether they are in stock or not.

9.6) Manual: This will prevent shipments from being automatically generated.

10) Delivery Via: indicates how the products should be delivered

10.1) Pickup: After Product is ready to ship customer will take the product by their own vehicle.

10..2) Delivery: Delivery done by the vendor itself to the customer.

10.3) Shipper: The Shipper indicates the method of delivering product via ship, aeroplane..etc.

11.Freight Cost Rule :Method for charging flight

11.1 Calculated : We can calculated the freight cost

11.2 Fix price : Fixed the freight cost

11.3 Included in Price : Already included in the product price list

12.Insurance Cost Rule :Method for charging insurance

12.1 Calculated : We can calculate the insurance cost

12.2 Fix price : Fixed the insurance cost

12.3 Included in Price : Already included in the product price list

13.Packing and Forwarding Cost Rule :Method for charging Packing and Forwarding

13.1 Calculated : We can calculate the Packing and Forwarding cost

13.2 Fix price : Fixed the Packing and Forwarding Cost

13.3 included in price :Already included in the product price list

14.Payment Rule:This field used to select the payment type

14.1 Cash: After receiving the invoice, customer pay the invoice amount through cash only

14.2 Check: After receiving the invoice, customer pay the invoice amount through check

14.3 Credit Card:Payment amount pay to vendor to use Credit Card

14.4 Direct Debit:Payment amount pay to direct vendor account number

14.5 Mixed POS Payment

14.6 NEFT

14.7 On Credit

14.8 RTGS: Payment amount pay to RTGS

15.Payment term:The terms of payment(immediate ,30 days,etc)

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 the document that you are going to process

Non-Critical Fields

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

2. campaign:

Zoom condition’s

1.Shipment customer

2.invoice (customer)

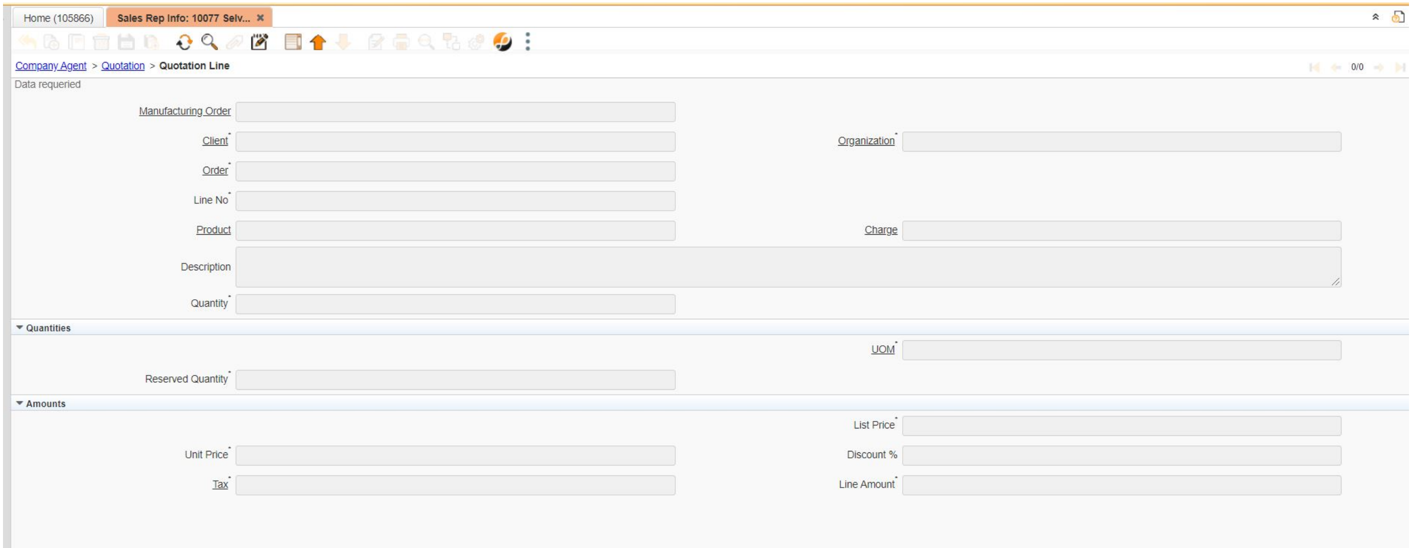
3.invoice payment schedule

4 MRP

5.Shipments package plan

Customization

Quotation > Quotation line



Critical Fields

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

2.Quantity : Quantity which needs to be quoted

3.UOM: The record will populate from 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 specif customer to be used

Critical & onetime setup fields

Non-Critical Fields

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

2. campaign:

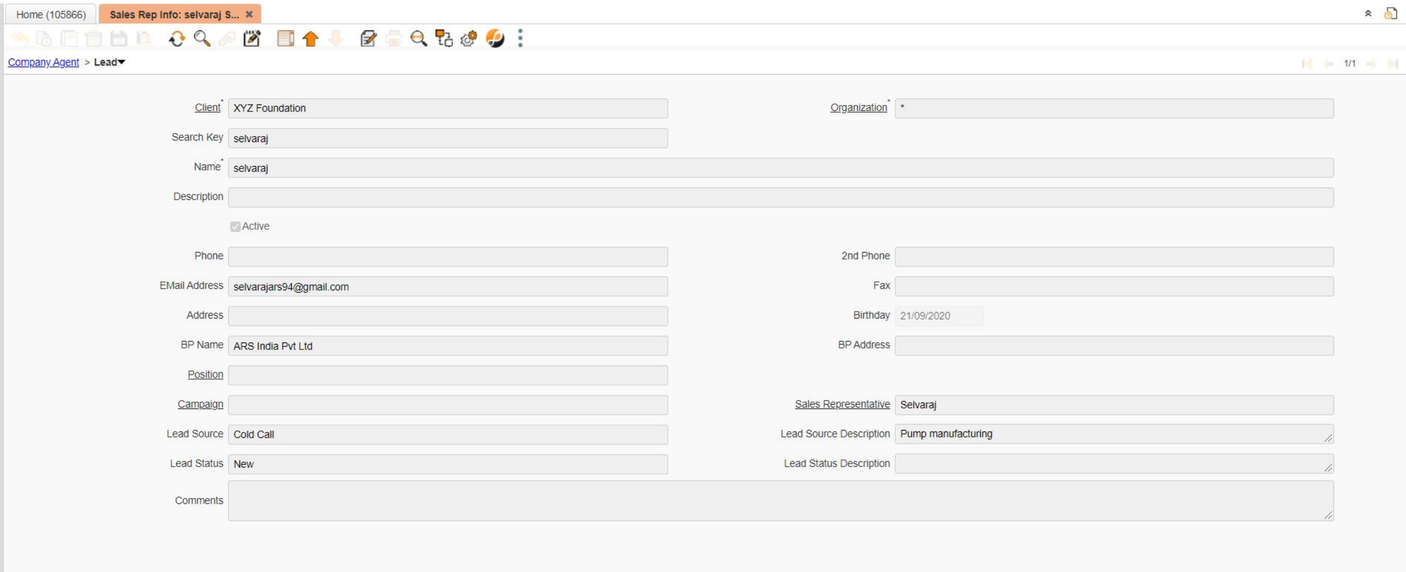
Serial number/Lot number (ASI)

In this Field we can set Attribute instance for this product & we not generate serial number in Quotation.

Zoom condition’s

Validation

Lead



Critical Fields

1.Name : This field is used to enter the new customer contact person name

2.Lead Date : This Field is used to capture the date of the Lead

3.Phone : This Field is used to enter the Customer Phone Number

4.2nd Phone : This Field is used to Capture the Customer Phone Number 2

5.Email address : This Field is used to Capture the Customer Email Address

6.Fax : This Field is used to capture Customer Fax Number

7.Customer name : This field is used to enter the new customer Name

8.Customer location : This Field is used to capture Customer Location

9.Lead source : This field is used to capture the source for the enquiry

9.1 Cold call : By a cold call is the source for this enquiry

9.2 Conference : Company Conference is the source for this enquiry

9.3 Customer portal : Customer portal is the source for this enquiry

9.4 Dealer : By a Dealer is the source for this enquiry

9.5 Email : Company Email as a source for this enquiry

9.6 Employee : By a Company Employee is the source for this enquiry

9.7 Existing customer : Existing Customer is the source for this enquiry

9.8 Magazine : Company in Magazine is the Source for this enquiry

9.9 Partner : By partner is the source for this enquiry

9.10 Trade show : By Company trade show is the source for this enquiry

9.11 Web site : Company Website is the source for this enquiry

9.12 Word of mouth : By Word of Mouth is the source for this enquiry

10.Lead status

10.1 Cold - Cold is the current status of the lead in the Entire cycle

10.2 Converted - This status defines that the lead is converted in the cycle

10.3 Expired - This status defines that the lead Time expired

10.4 Follow up - This status defines the lead is still in follow up

10.5 Hot - This status defines the lead is in a Converting Stage

10.6 New -This status defines the lead is new

10.6 Recycled - This status defines that the lead is Reworked

10.7 Warm - This status defines a normal lead stage in the entire cycle

10.8 Working - This status defines the lead is in IN progress

11. Lead Source description - Short Description of the lead source

12.Lead status Description - Short Description of the lead Status

13.Sales Representative :This field used for sales rep updating purpose ,the regard will display from employee master when sales rep field is checked

Critical & onetime setup fields

1.Organization:This Field is used to select the organization name

Non-Critical Fields

1.Campaign

2.Comments

Zoom condition’s

Customization