

# Sales Rep Info

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# Introduction

This window is used to know the information of sales rep,

We can able to see the orders, Invoices and Lead which mapped with the corresponding sales rep.

# Tabs

# Company Agent

Home (105864) Sales Rep info: Admin x

Company Agent

Client: XYZ Foundation Organization: \*

Name: Admin

Description: Admin

☒ Active

Business Partner: Admin Partner Location:

Email Address: admin@user.com

Title: Birthday: 10/01/2000

Phone: Fax:

Supervisor: Trx Organization:

Orders Order Lines Invoices Invoice Line Quotation Quotation Line Lead

513 Records

Organization	Document No	Order Reference	Description	Document Type	Document Status	Date Ordered	Account Date	Date Promised	Date printed	Business Partner	Invc
XYZ Offsite	04			Purchase Order xyz	Completed	05/08/2019	05/08/2019	05/08/2019		ABC Industries	

## 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

1 Line - 10,000.00 - Total: 11,800.00 INR = 11,800.00

ClientXYZ Foundation

OrganizationXYZ Offsite

Document No06

Order Reference

Description

Document TypePurchase Order xyz

Document StatusCompleted

Date Ordered07/08/2019

Account Date07/08/2019

Date Promised07/08/2019

Date printed

Business PartnerABC Industries

Invoice PartnerABC-ABC Industries

Partner LocationCoimbatore

Invoice LocationCoimbatore

Delivery

Delivery RuleAvailability

PriorityMedium

WarehouseXYZ Main warehouse

☐ Drop Shipment

Invoicing

Invoice RuleAfter 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 Offsite	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

Home (105866) Sales Rep Info: Admin

Company Agent > Invoices

Data requested

Client Organization

Document No Order Reference

Order

Description

Document Type Document Status

Date Invoiced Account Date

Date Ordered Date printed

Business Partner Partner Location

Price List Currency

Payment Rule

Payment Term

Sales Representative

Invoice Line

0 Records

Organization	Invoice	Line No	Description	Charge	Product	Description Only	Resource Assignment	Attribute Set Instance	Quantity Invoiced	Unit Price	List P
No Records found											

## 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**

Tabs

# Invoice > Invoice Line

The screenshot shows the 'Invoice Line' form in a software application. The top navigation bar includes 'Home (105870)', 'Sales Rep Info: Selvaraj', and 'Invoice (Customer): 100110'. The form is divided into several sections: 'Client' (XYZ Foundation), 'Organization' (XYZ Office), 'Invoice' (100110\_14/10/2020\_1.18), 'Line No' (10), 'Product' (rough shaft\_rough shaft), 'Attribute Set Instance', 'Description', 'PrintNotes', 'Shipment/Receipt Line', 'Charge', 'Resource Assignment', 'Quantities' (Quantity: 1, UOM: Nos), 'Amounts' (Price: 1.00, Unit Price: 1.00, Tax: Intrastate 18%, List Price: 1.00), 'Reference' (Project, Campaign), 'Status' (Line Amount: 1.00, Asset), and 'Description Only' (unchecked) and 'Printed' (checked).

## 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

Home (105866) Sales Rep Info: 10077 Selv... x

Company Agent > Quotation

Client: XYZ Foundation Organization: HQ

Document No: 10077 Order Reference:

Description:

Target Document Type: Quotation

Validity:

Date Ordered: 21/09/2020 Date Promised: 21/09/2020

Business Partner: Ars india pvt ltd Invoice Partner: 1000060-Ars india pvt ltd

Partner Location: TamilNadu Invoice Location: TamilNadu

User/Contact: selvaraj Invoice Contact: selvaraj

Order Source:

Terms and condition:

Delivery Rule: Availability Delivery Terms: Immediate

Quotation Line

0 Records

Client	Organization	Order	Business Partner	Partner Location	Date Ordered	Date Promised	Line No	Warehouse	Product	Charge	Description
0 Records											

## 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

Home (105866) Sales Rep Info: 10077 Selv... X

Company Agent > Quotation > Quotation Line

Data requested

Manufacturing Order

Client

Order

Line No

Product

Description

Quantity

Organization

Charge

Quantities

Reserved Quantity

UOM

Amounts

Unit Price

List Price

Discount %

Tax

Line Amount

## 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)**

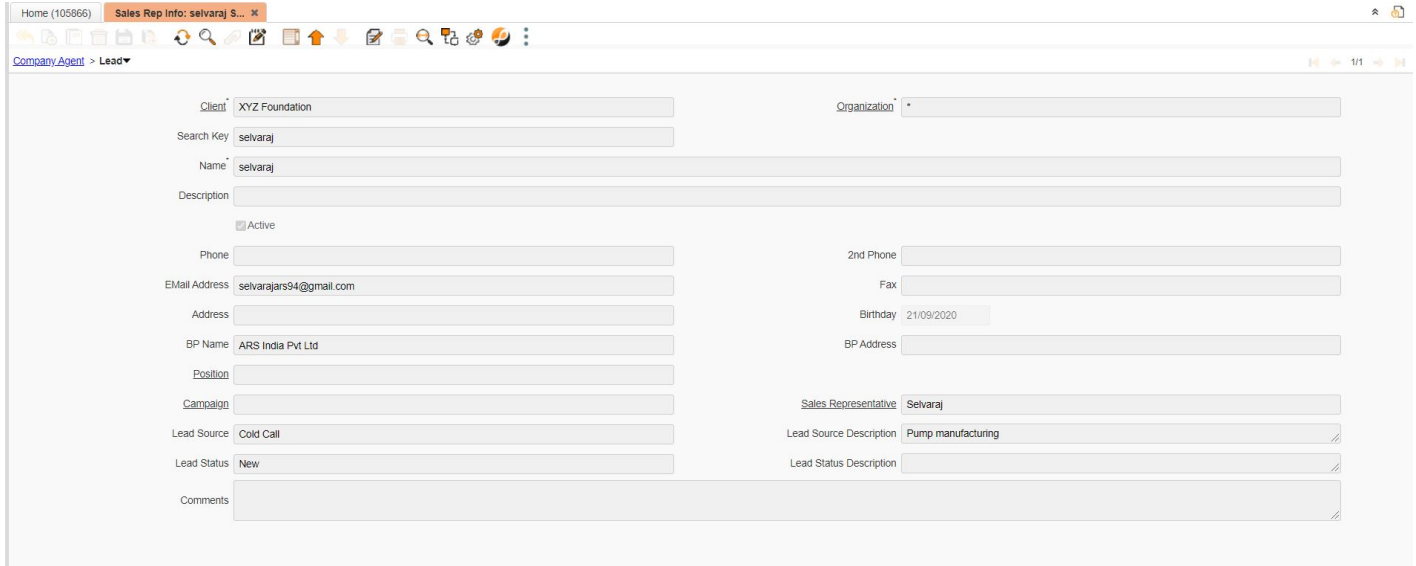
In this Field we can set Attribute instance for this product & we not generate serial number in Quotation.

## **Zoom condition's**

## **Validation**

## Tabs

# Lead



The screenshot shows a web application interface for a CRM system. At the top, there are two tabs: 'Home (105866)' and 'Sales Rep Info: selvaraj S...'. Below the tabs is a navigation bar with various icons and a breadcrumb trail 'Company Agent > Lead'. The main form is titled 'Lead' and contains several input fields and checkboxes. The fields are organized into two columns. The left column includes fields for Client (XYZ Foundation), Search Key (selvaraj), Name (selvaraj), Description, Active checkbox, Phone, EMail Address (selvarajars94@gmail.com), Address, BP Name (ARS India Pvt Ltd), Position, Campaign, Lead Source (Cold Call), Lead Status (New), and Comments. The right column includes fields for Organization, 2nd Phone, Fax, Birthday (21/09/2020), BP Address, Sales Representative (Selvaraj), Lead Source Description (Pump manufacturing), and Lead Status Description. The form is designed with a clean, modern look using light gray borders and a white background.

## 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**

# Validations & Actions

# Validation

## **Save**

1.System will check the all mandatory fields

## **Delete**

1.System will delete the order and its history details