Module: Selling

Module: Selling

Selling is the communication that happens with the customer prior to and during the sale. You might be managing all the communication yourself or you may have a small team of sales people to handle this. ERP+ helps you track the communication leading up to the sale by keeping all your documents in an organized and searchable manner.

1. Topics

1.1 Setup

1. Selling Settings
2. Sales Partner
3. Shipping Rule
4. Product Bundle
5. Item Price
6. Sales Person Target Allocation

1.2 Sales

1. Quotation
2. Sales Order
3. Sales Analytics

2. Articles

2.1 Sales

1. Sales Persons in the Sales Transactions
2. Request for Raw Materials from Sales Order
3. Applying Discount
4. Close Sales Order

2.2 Advanced

1. Selling in Different UOM
2. Adding Margin
3. Amending Sales Order After Submit
4. Drop Shipping

2.3 Other

1. ERP+ For Services Organization
2. Shipping Rule

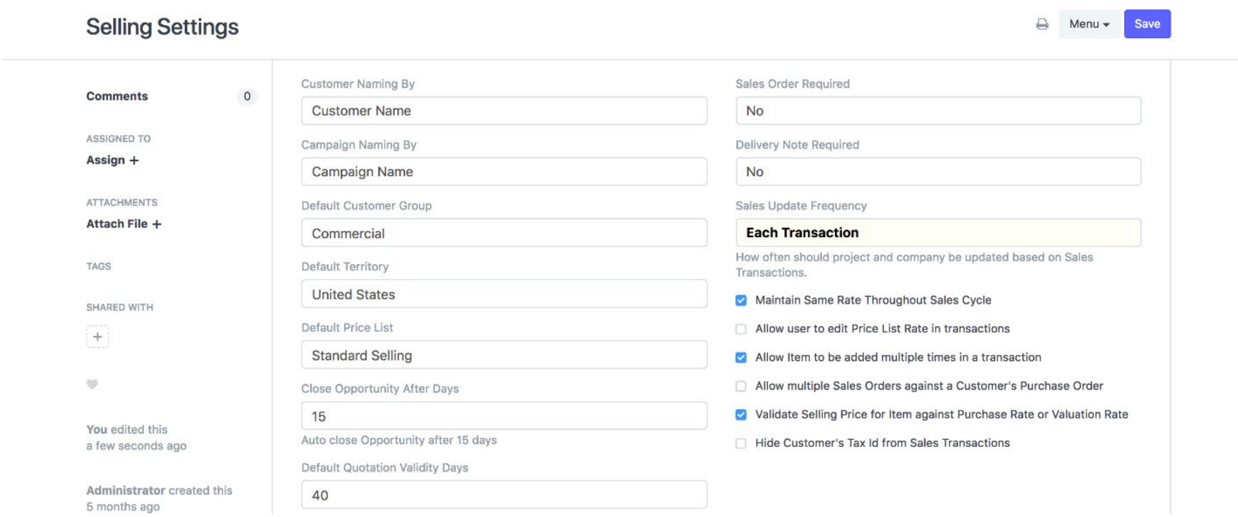
1.1 Topic: Setup

1. Selling Settings
2. Sales Partner
3. Shipping Rule
4. Product Bundle
5. Item Price
6. Sales Person Target Allocation

1. Selling Settings

Selling Setting is where you can define properties which will be applied to the masters and transactions involved in the sales cycle.

Let's check into each property one by one.



1. Customer Naming By

When a customer is saved, a unique ID is generated for that Customer. By default, Customer ID is generated based on Customer Name. If you wish to save Customer using a naming series, in the field Customer Naming Series, set value as "Naming Series".

Example of Customer Id's saved in Naming Series - CUST00001,CUST00002, CUST00003... and so on.

You can set Naming Series for Customers from: Setup > Data > Naming Series

2. Campaign Naming By

Just like for Customer, you can also configure naming methodology for the Campaign master as well. By default, Campaign will be saved with Campaign Name only.

3. Default Customer Group and Territory

Select a default Customer Group which will be auto-updated when creating a new Customer. Quotations can be created for the Customers as well as for the Leads. When converting a Quotation into Sales Order, which is created for a Lead, the system attempts to convert that Lead into Customer. While creating Customer in the backend, values for Customer Group and Territory is picked from Selling Settings. If no default values are found for Customer Group or

Territory, then you will receive a validation message asking for Customer Group or Territory. Or you can manually convert a Lead into Customer.

5. Default Price List

Price List set in this field will be auto-updated in the Price List field of sales transactions like Quotation, Sales Order, Delivery Note and Sales Invoice.

6. Close Opportunity After Days

If there are many Opportunities having a status other than Open, then they will be auto-closed after the no. of days mentioned in this field.

7. Default Quotation Validity Days

Quotation Issues to the customer is Valid for certain days only. In the Quotation, you can update Valid till Date manually. By default, the Valid Till date is auto-set as 30 days from the Quotation's Posting Date. You can change the no. of days in this field as per your business case.

8. Sales Order Required

If you wish to make Sales Order creation mandatory before the creation of Sales Invoice, then you should set the Sales Order Required field as Yes. By default, this will be "No" for a value.

9. Delivery Note Required

To make Delivery Note creation as mandatory before Sales Invoice creation, you should set this field as "Yes". By default, this will be "No" for a value.

10. Maintain Same Rate Throughout Sales Cycle

The system by default validates that item price will be the same throughout the sales cycle (Sales Order - Delivery Note - Sales Invoice). If you could have item price changing within the cycle, and you need to bypass validation of the same rate throughout the cycle, then you should uncheck this field and save.

11. Allow User to Edit Price List Rate in Transaction

Item table of the sale transactions has a field called Price List Rate. This field is non-editable by default in all the sales transactions. This is to ensure that price of an item is fetched from Item Price record and the user is not able to edit it.

If you need to enable the user to edit Item Price, fetched from Price List of an item, you should uncheck this field.

12. Allow multiple Sales Orders against a Customer's Purchase Order

When creating a Sales Order, you can update the Purchase Order ID and Date received from the Customer. You can create only one Sales Order against the Customer's PO No. and Date. However, if you wish to allow the creation of multiple Sales Order's against the same PO No. of the Customer, enable the property of "Allow multiple Sales Orders against a Customer's Purchase Order".

13. Validate Selling Price for Item against Purchase Rate or Valuation Rate

When making sales, it's important to know if you are not selling it at a loss-making price. Enabling this validation will validate item's Selling Price with its valuation/buying price. If item's selling price is found to be less than it's buying price, then you will get a prompt indicating the same.

14. Hide Customer's Tax Id from Sales Transactions

As per the statutory requirement, most of the Customers have unique Tax ID assigned to them. They also need to have this tax ID fetched in the selling transactions. However, if you don't wish to use this functionality, you can disable by checking this property.

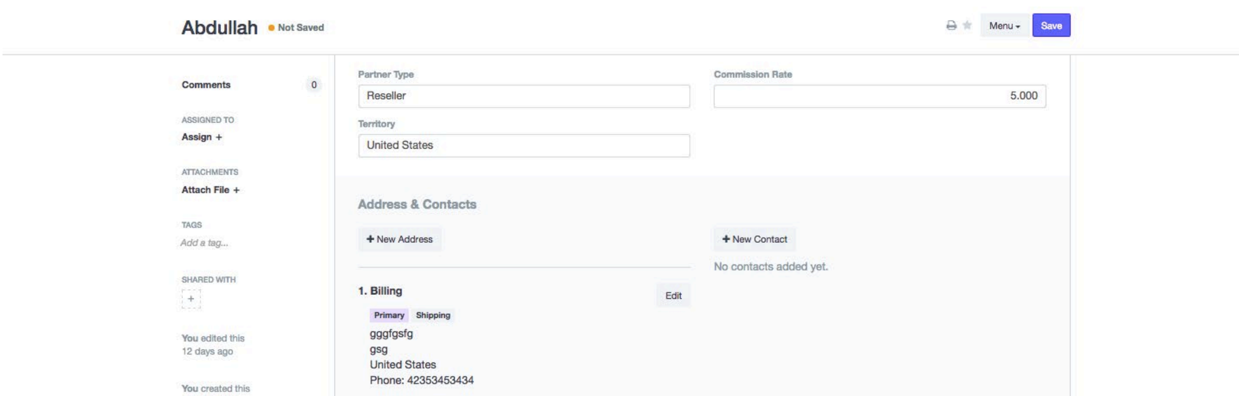
2. Sales Partner

People who assist you in getting business are termed as Sales Partners. Sales Partners can be represented by different names in ERP+. You can call them Channel Partner, Distributor, Dealer, Agent, Retailer, Implementation Partner, Reseller etc.

For each Sales Partner, you can define commission offer to them. When Sales Partner is selected in transactions, their commission is calculated over Net Total of Sales Order/Invoice or Delivery Note.

You can track Sales Person-wise commission in the report under Selling module. To create a sales partner, go to: Selling > Setup > Sales Partner

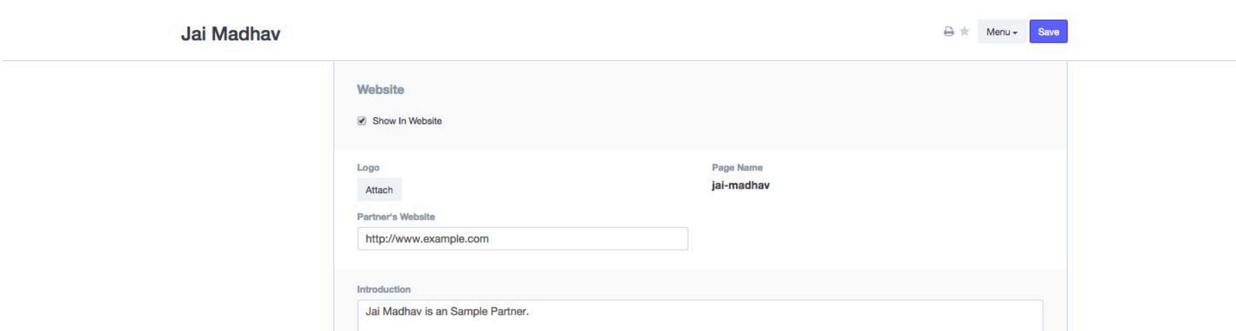
Sales Partners are saved with Sales Partner name provided by user.



You can track their address and contact details and also allocate Sales Partner for each Item Group, based on Qty and Amount.

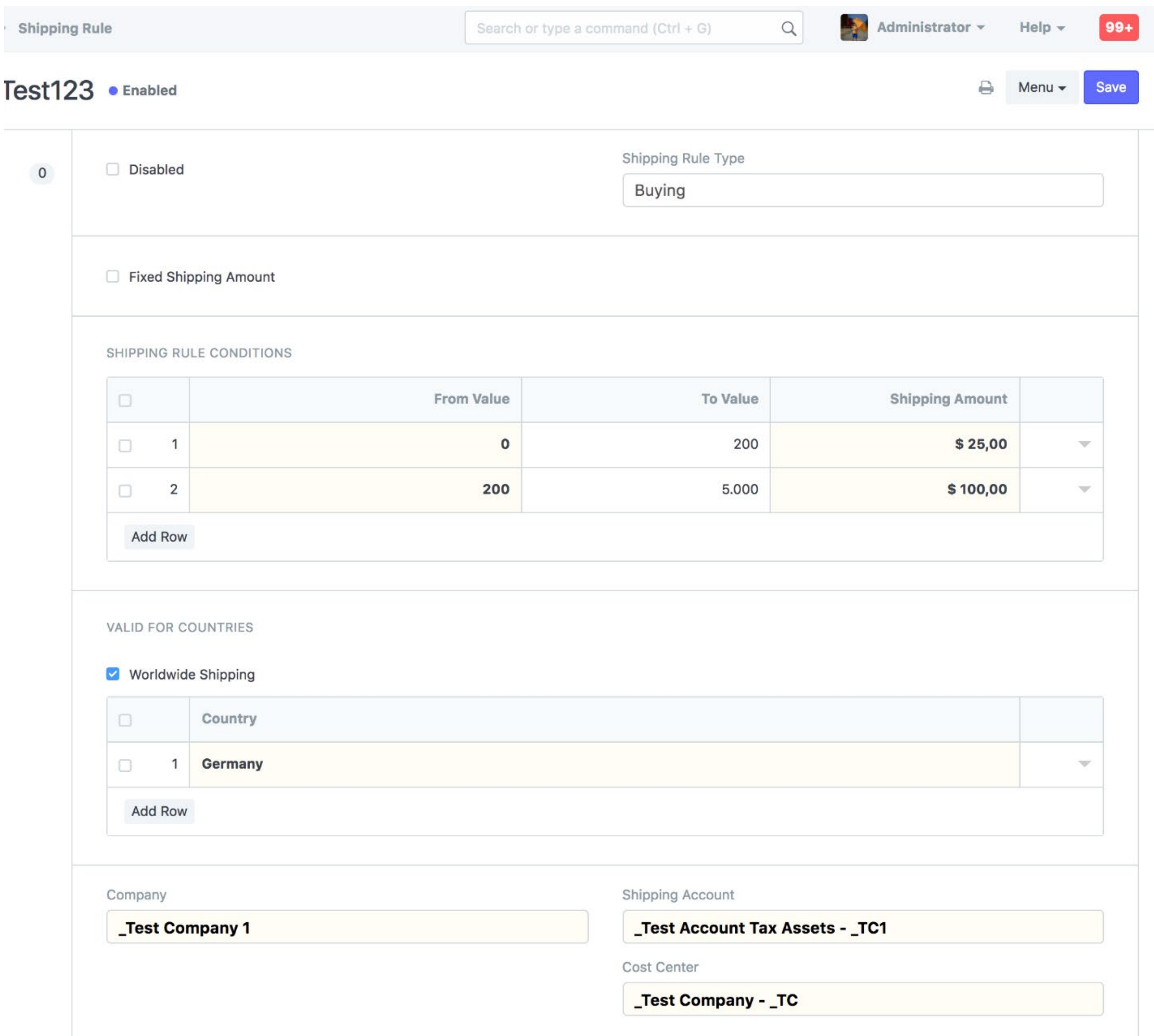
Including Sales Partners in Your Website

To include the name of your Partner on your website, check the "Show in Website" box. When click on "Show in Website", you will see field where you can attach logo of partner's company and enter brief and introduction of partner.



3. Shipping Rule

Using Shipping Rule, you can define the cost for delivering the product to the customer and also to the supplier. You can define different shipping rules or a fixed shipping amount for the same item across different territories.



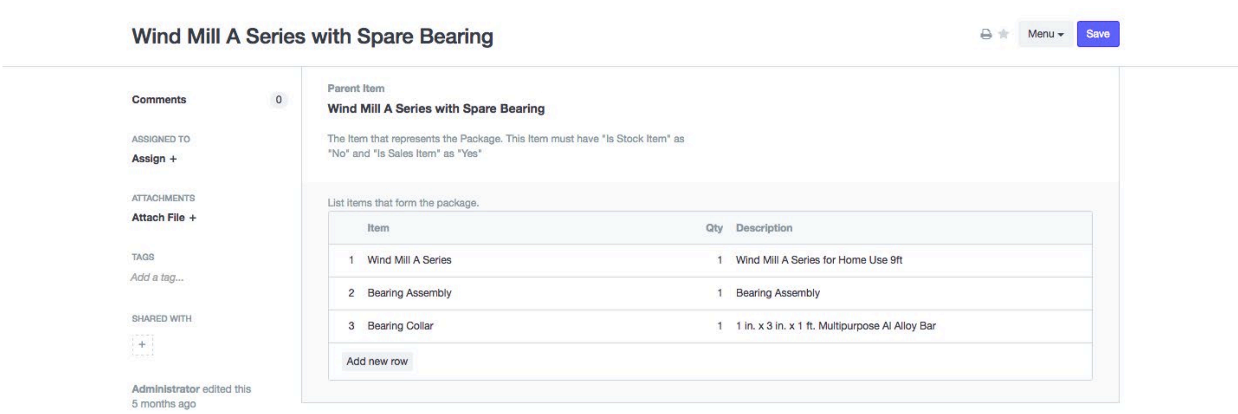
4. Product Bundle

Product Bundle can be seen as something like a "Bill-of-Material" on the Sales side. It's a master where you can list existing items which are bundled together and sold as a set (or bundle). For instance, when you sell a laptop, you need to ensure that charger, mouse and laptop bag are delivered with it and stock levels of these items get affected. To address this scenario, you can set create a Product Bundle for the main item, i.e. laptop, and list deliverable items i.e. laptop + charger + mouse + laptop bag as so-called "Child Items".

Following are the steps on how to setup Product Bundle master, and how is it used in the sales transactions.

Create new Product Bundle

To create new Product Bundle, Go to: Selling > Setup > Product Bundle > New



Select Parent Item

In Product Bundle master, there are two sections. The "Parent Item" and a List of items to be shipped (Child Items).

The "Parent Item" must be a so-called non-stock item. The "Parent Item" is to be seen more like a vessel or virtual item and not a physical product. To create a non-stock item, you have to unmark "Maintain Stock" in the Item Form. This is non-stock item because there is no stock maintained for it but only for the "Child Items". If you want to maintain stock for the Parent Item, then you must create a regular Bill of Material (BOM) and package them using a Stock Entry Transactions.

Select Child Items

In Package Item section, you will list all the child items for which we maintain stock and is delivered to customer. Remember: The "Parent Item" is just virtual, so your main product (a laptop in our example here) also has to be listed on the List of Child (or Package) Items

Product Bundle in the Sales Transactions

When making Sales transactions (Sales Invoice, Sales Order, Delivery Note) the Parent Item will be selected in the main item table.

On selection of a Parent Item in the main item table, its child items will be fetched in Packing List table of the transaction. If child item is the serialized item, you will be able to specify its Serial Mo. in packing List table itself. On submission of transaction, system will reduce the stock level of child items from warehouse specified in Packing List table.

Use Product Bundle to Manage Schemes:

This work-around in Product Bundle was discovered when a customer dealing into nutrition product asked for feature to manage schemes like "Buy One Get One Free". To manage the same, he created a non-stock item which was used as Parent Item. In description of item, he entered scheme details with items image indicating the offer. The saleable product was selected in Package Item where qty was two. Hence every time they sold one qty of Parent item under scheme, system deducted two quantities of product from Warehouse.

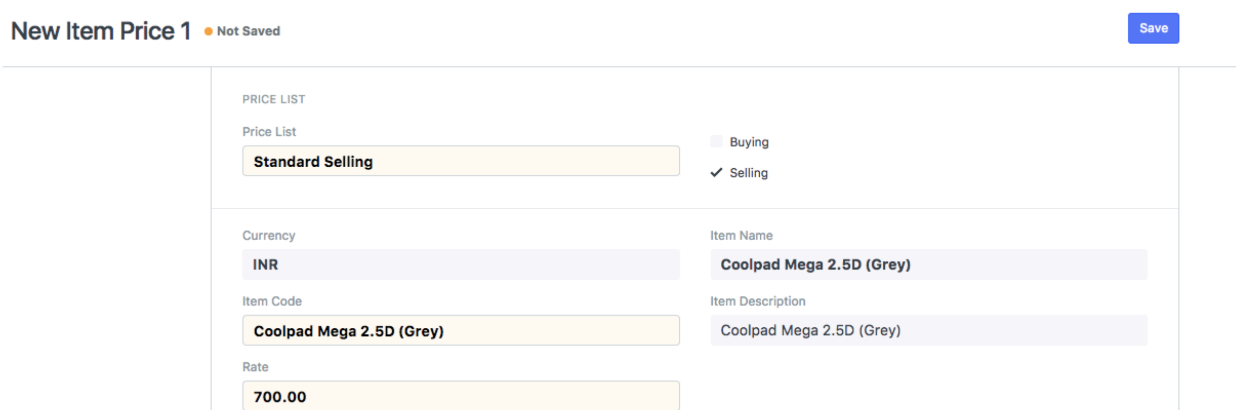
5. Item Price

Item Price is the record in which you can log selling and buying rate of an item.

There are two ways to reach to new Item Price form: Selling/Buying/Stock > Setup > Item Price > New Item Price or from: Item > Add/Edit Prices > Click on "+" >> New Item Price

Step 1: Select Price List

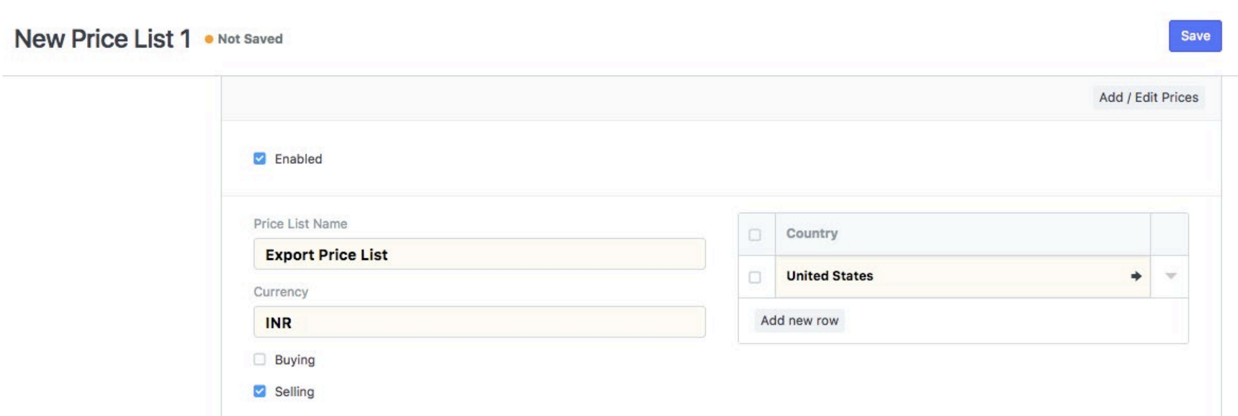
You can create multiple Price List in ERP+ to track Selling and Buying Price List of an item separately. Also, if item's selling prices id changing based on territory, or due to other criteria, you can create multiple selling Price List for it.



On selection of Price List, its currency and for selling or buying property will be fetched as well. To have Item Price fetching in the sales or purchase transaction, you should have Price List id selected in the transaction, just above Item table.

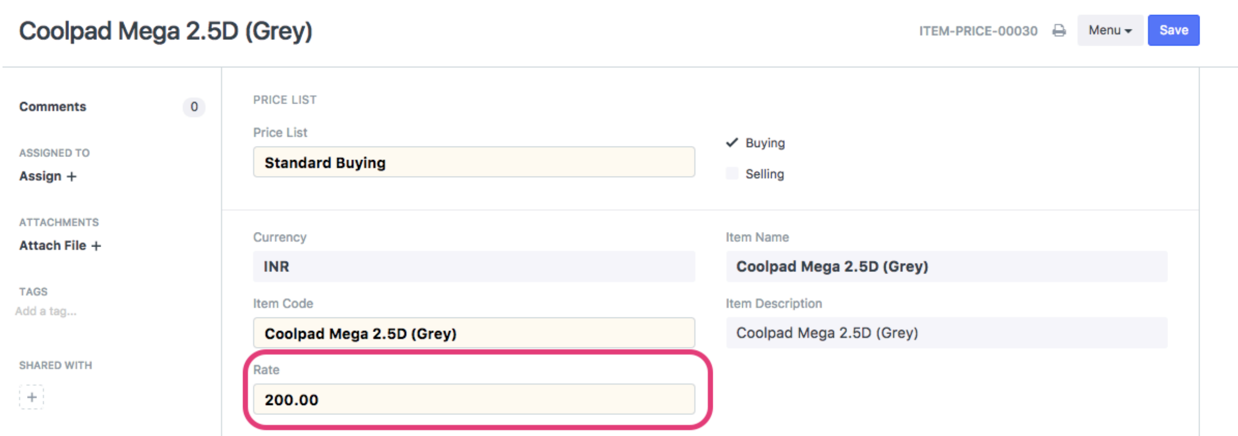
Step 2: Select Item

Select item for which Item Price record is to be created. On selection of Item Code, Item Name and Description will be fetched as well.



Step 3: Enter Rate

Enter selling/buying rate of an item in Price List currency.



Step 4: Save Item Price

To check all Item Price together, go to: Stock > Main Report > Item-wise Price List Rate

You will find option to create new Item Price record (+) in this report as well.

6. Sales Person Target Allocation

With management of Sales Person, ERP+ also allow you to assign target to Sales Persons based on Item Group and Territory. Based on target allocated and actual sales booked by Sales Person, you will get target variance report for the Sales Person.

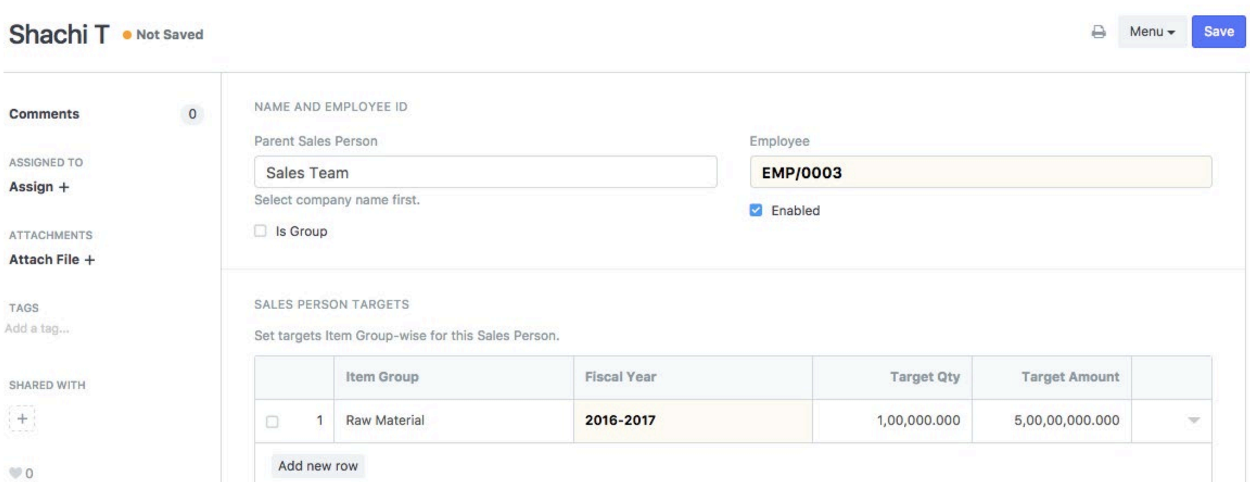
1. Sales Person - Item Groupwise Target Allocation

1.1 Open Sales Person's Master

To allocate target, you should open specific Sales Person master. Selling > Setup > Sales Person > (Open Sales Person)

1.2 Allocate Item Groupwise Target

In the Sales Person master, you will find table called Sales Person Target.



In this table, you should select Item Group, Fiscal Year, Target Qty and Amount.

You can give target in amount or quantity, or in both. Item Group can also be left blank. In this case the system will calculate target based on all the Items.

1.3 Target Distribution

If you wish to spread allocated target across months, then you should setup Monthly Distribution master, and select it in the Sales Person master. Considering our example, target for the month of December will be set as 5 qty (10% of total allocation).

Report - Sales Person Target Variance Item Groupwise

To check this report, go to: Selling > Standard Report > Sales Person Target Variance (Item Group-wise)'

This report will provide you variance between target and actual performance of Sales Person. This report is based on Sales Order report.

As per the report, allocated target to Sales Person for the month of December was 5 qty. However, Sales Order was made for this employee and Item Group for only 3 qty. Hence, variance of 2 qty is shown in the report.

2. Sales Person – Territory-wise Target Allocation

To allocate target to Sales Person based on Territory, you can should select specific Sales Person in the Territory master. This Sales Person is entered just for the reference. Sales Person details are not updated in the variance report of Territory-wise Target Allocation.

2.1 Go to Territory master

Selling > Setup > Territory > (Open specific Territory master)

In the Territory master, you will find field to select Territory Manager. This field is linked to "Sales Person" master.

2.2 Allocating Target

Target Allocation in the Territory master is same as in Sales Person master. You can follow same steps as given above to specify target in the Territory master as well.

2.3 Target Distribution

Using this Monthly Distribution document, you can divide target Qty or Amount across various months.

2.4 Report - Territory Target Variance Item Groupwise

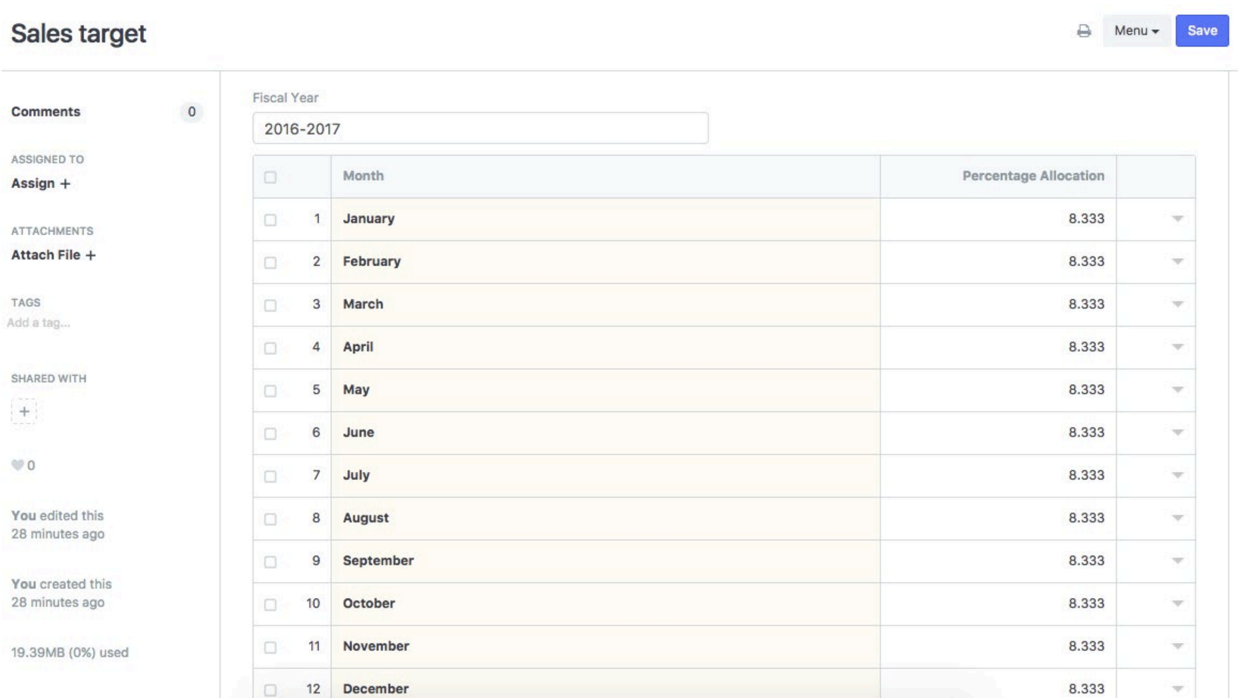
This report will provide you variance between target and actual performance of Sales in particular territory. This report is based on Sales Order report. Though Sales Person is defined in the Territory master, its details are not pulled in the report.

Sr No	Territory	Item Group	Target (Apr)	Achieved (Apr)	Variance (Apr)	Target (May)	Achieved (May)	Variance (May)	Target (Jun)
1	Rest Of The World	All Item Groups	833.333	0.000	833.333	833.333	0.000	833.333	833.333

3. Target Distribution

Target Distribution document allows you to divide allocated target across multiple months. If your product and services is seasonal, you can distribute the sales target accordingly. For example, if you are into umbrella business, then target allocated in the monsoon season will be higher than in other months.

To create new Monthly Distribution, go to: Accounts > Monthly Distribution



	Month	Percentage Allocation
1	January	8.333
2	February	8.333
3	March	8.333
4	April	8.333
5	May	8.333
6	June	8.333
7	July	8.333
8	August	8.333
9	September	8.333
10	October	8.333
11	November	8.333
12	December	8.333

You can link Monthly Distribution while allocating targets in Sales Person as well as in Territory master.

1.2 Topic: Sales

1. Quotation
2. Sales Order
3. Sales Analytics
4. Manufacturing Work in Progress Report

1. Quotation

During a sale, the customer may request for a written note about the products or services you are planning to offer, along with the prices and other terms of engagement. This is called a "Proposal" or an "Estimate" or a "Pro Forma Invoice" or a **Quotation**.

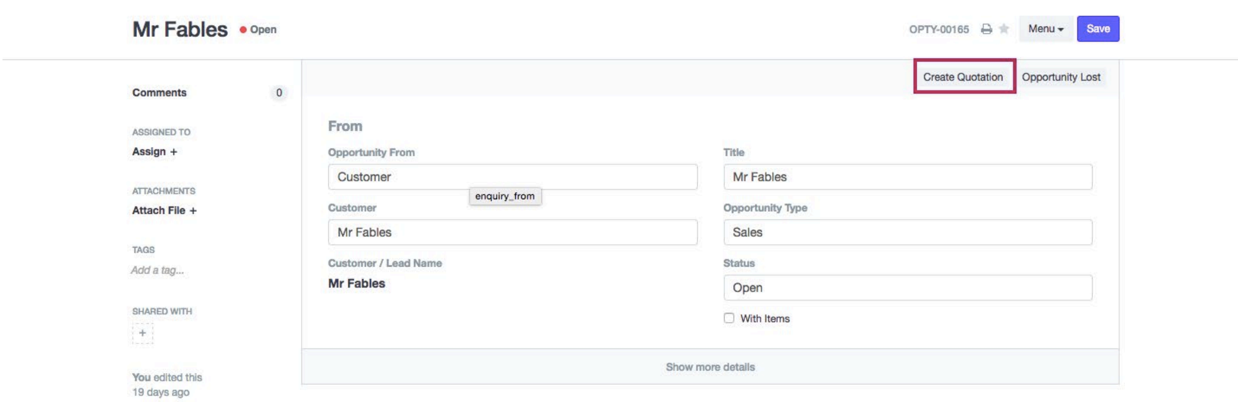
A typical Selling flow looks like:

Customer → Quotation → Sales Order → Delivery Note → Sales Invoice → Payment Entry

To create a new Quotation, navigate to: Selling > Quotation > New Quotation

Creating Quotation from Opportunity

You can also create a Quotation from an Opportunity.



A Quotation contains details about:

- The recipient of the Quotation
- The Items and quantities you are offering.
- The rates at which they are offered.
- The taxes applicable.
- Other charges (like shipping, insurance) if applicable.
- The validity of contract.
- The time of delivery.
- Other conditions.

Tip: Images look great on Quotations. Make sure your items have an image attached.

Rates

The rates you quote may depend on two things.

- The Price List: If you have multiple Price Lists, you can select a Price List or tag it to the Customer (so that it is auto-selected). Your Item prices will automatically be updated from the Price List. For details refer Price List
- The Currency: If you are quoting to a Customer in a different currency, you will have to update the conversion rates to enable ERP+ to save the information in your standard Currency. This will help you to analyze the value of your Quotations in standard Currency.

Taxes

To add taxes to your Quotation, you can select a Sales Taxes and Charges Template or add the taxes on your own.

Terms and Conditions

Each Quotation must ideally contain a set of terms, of your contract. It is usually a good idea to make templates of your Terms and Conditions, so that you have a standard set of terms. You can do this by going to: Selling > Terms and Conditions

What should Terms and Conditions Contain?

- Validity of the offer.
- Payment Terms (In Advance, On Credit, part advance etc).
- What is extra (or payable by the Customer).
- Safety / usage warning.
- Warranty if any.
- Returns Policy.
- Terms of shipping, if applicable.
- Ways of addressing disputes, indemnity, liability, etc.
- Address and Contact of your Company.

Submission

Quotation is a “Submittable” transaction. Since you send this Quotation to your Customer or Lead, you must freeze it so that changes are not made after you send the Quotation.

Tip: Quotations can also be titled as “Proforma Invoice” or “Proposal”. You can do this by selecting a Print Heading in the Print Settings section. To create new Print Headings, go to: Setup > Printing > Print Heading.

Discount

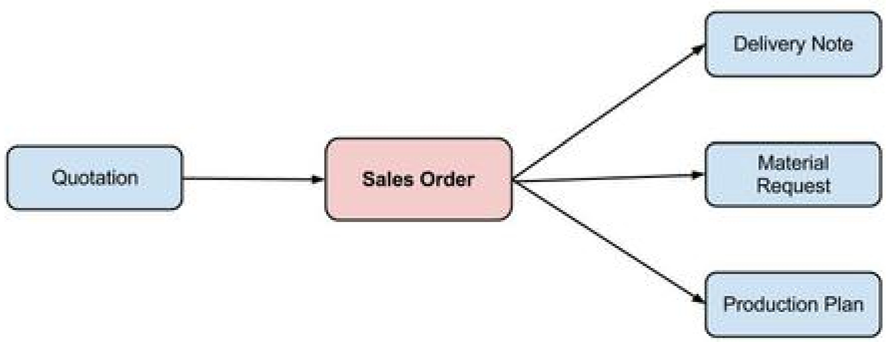
While making your sales transactions like a Quotation (or Sales Order) you can also give discounts to your customers. In the Discount section, add the discount in percentage or fixed amount.

2. Sales Order

The Sales Order confirms the receipt of an order from your customer. It is usually a binding Contract with your Customer. Once your customer confirms the Quotation you can convert your Quotation into a Sales Order. There are various transactions which can be triggered from Sales Order like;

- Delivery Note
- Sales Invoice
- Material Request
- Production Order
- Project

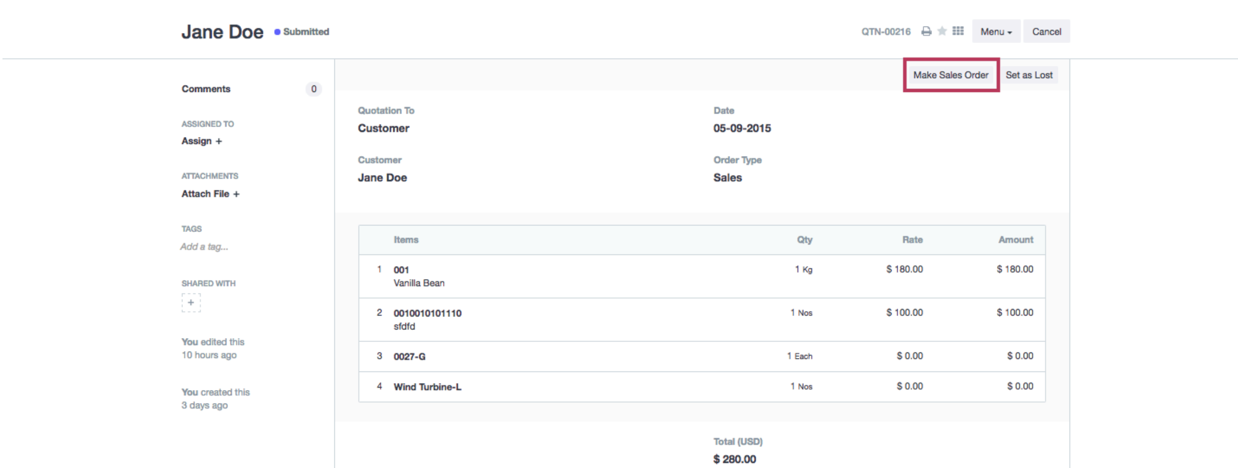
Sales Order Flow-Chart:



To create a new Sales Order, go to: Selling > Sales Order > New Sales Order

Creating Sales Order from Quotation

You can also create a Sales Order from a submitted Quotation.



Or you can create a new Sales Order and pull details from a Quotation.

Most of the information in your Sales Order is the same as the Quotation.

There are a few amongst other things that a Sales Order will ask you to update.

- Enter Delivery Date against each item. If there are multiple items and if you enter delivery date in the first row, the date will be copied to other rows as well where it is blank.
- Customer Purchase Order number: If your customer has sent you a Purchase Order, you can update its number for future reference (in billing).
- To allow for per-Customer, per-Item Pricing Rules ("Customer A" pays $1.00 for "Item 1" but "Customer B" pays $1.25 for "Item 1"), there's a check box in Selling Settings to enable saving the specific item price per customer when you change a price in the Sales Order.

Packing List

The “Packing List” table will be automatically updated when you “Save” the Sales Order. If any Items in your table are Product Bundle (packets), then the “Packing List” will contain the exploded (detailed) list of your Items.

Reservation and Warehouses

If your Sales Order contains Items for which inventory is tracked (Is Stock Item is “Yes”) then, ERP+ will ask you for “Reservation Warehouse”. If you have set a default Warehouse for the Item, it will automatically set this Warehouse here.

This “reserved” quantity will help you project what is the quantity you need to purchase based on all your commitments.

Taxes

To add taxes to your Quotation, you can select a Sales Taxes and Charges Template or add the taxes on your own.

Sales Team

Sales Partner: If this Sale was booked via a Sales Partner, you can update the Sales Partner’s details with commission and other info that you can aggregate.

Sales Persons: ERP+ allows you to tag multiple Sales Persons who may have worked on this deal. You can also split the amount in targets of different Sales Persons and track how much incentives they earned on this deal.

Next Steps

Once you “Submit” your Sales Order, you can now trigger different aspects of your organization:

- To begin purchase click on Make -> Purchase Request
- To make a shipment entry click on Make -> Delivery Note. You can also make Delivery Note for selected items based on delivery date.
- To bill, make -> Sales Invoice
- To stop further process on this Sales Order, click on “Stop”

Submission

Sales Order is a “Submittable” transaction. See Document Stages. You will be able to execute dependent steps (like making a Delivery Note) only after “Submitting” this Sales Order.

Sales Order with Order type Maintenance

When the 'Order Type' of the Sales Order is 'Maintenance' follow the steps given below:

Step 1: Enter Currency, Price list and Item details.

Step 2: Mention taxes and other information.

Step 3: Save and Submit the form

Step 4: Once the form is submitted, the Action button will provide three choices. Maintenance Visit, Maintenance Schedule, and Invoice.

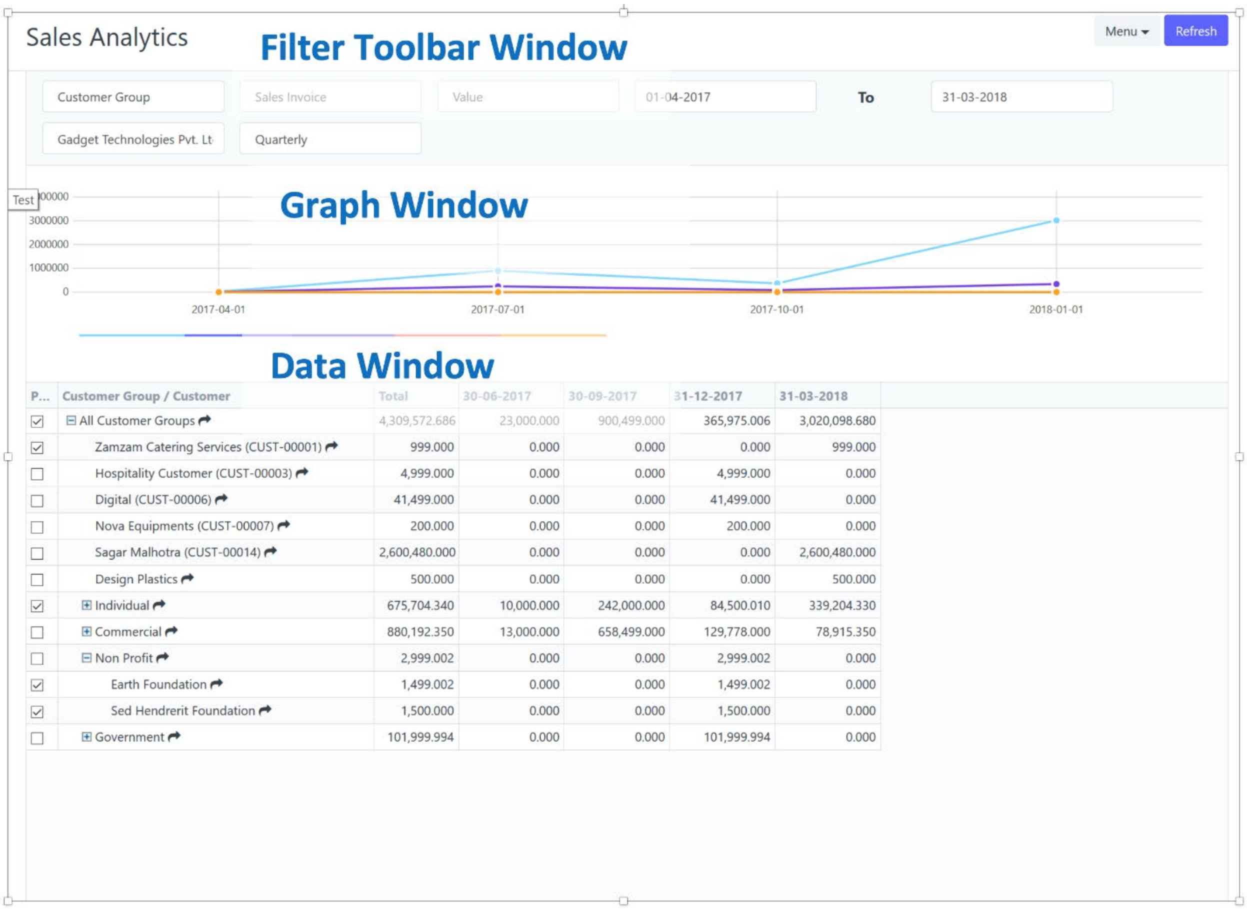
Note 1:
By clicking on the Action button and selecting 'Maintenance Visit' you can directly fill the visit form. The Sales Order details will be fetched directly.

Note 2:
By clicking on the Action button and selecting 'Maintenance Schedule' you can fill the schedule details. The Sales Order details will be fetched directly.

Note 3:
By clicking on the Invoice button you can make an Invoice for your services. The sales orders details will be fetched directly.

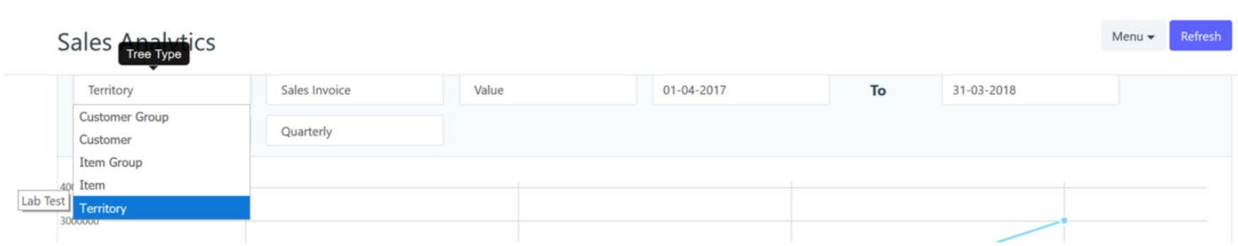
3. Sales Analytics Report

With the ability to see and analyze your sales data in different views, data is able to diagnose and analyze to better understand how sales are performing. The data allows for filters to be altered dynamically with criteria selections through filters. There are three window areas that make up the Sales Analytics Report. The Filter Toolbar Window, the Graph Window and the Data Window. Please see the example below.



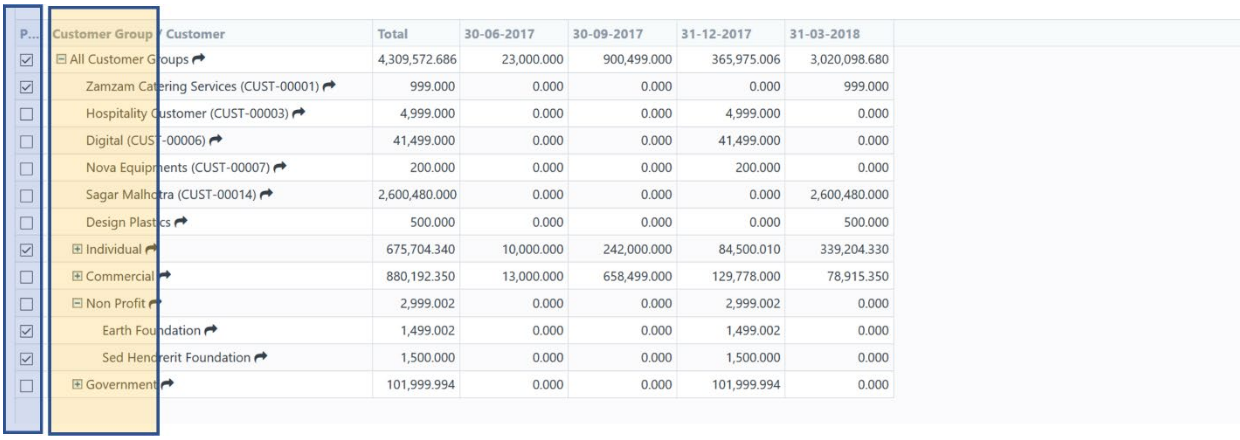
The Filter Toolbar Window

The toolbar provides for filtering to select what data is to be used. Using the dropdown selections, data selections can be refined in a compounding fashion. As the selections are made, data is reflected in the data window as well as the graph window.



Data Analytics and Charts

Within the data window, selections can be made to expand or compress the data to be analyzed. At the left of the window, (blue), are selection boxes. Each box can be selected for use. There is no restriction for the data comparison, so a higher level can be compared to lower levels. The data column to the right, (orange), contains selection boxes with + and minus selections. Selecting a + will expand the data and selecting a – will compress the data. As this is performed, the Graph Window is dynamically altered allowing rapid data analysis.

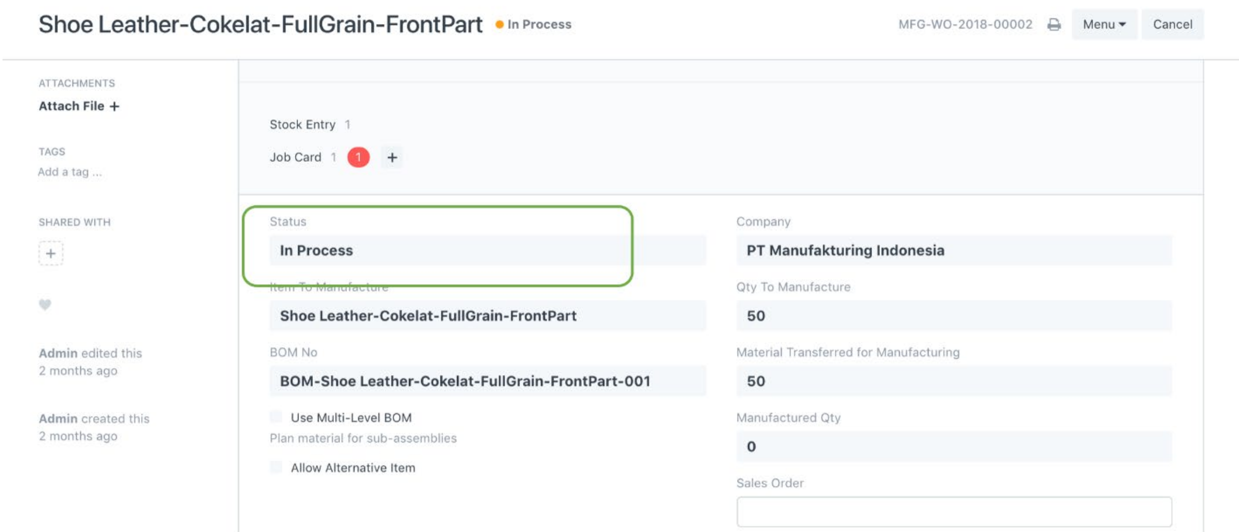


P...	Customer Group / Customer	Total	30-06-2017	30-09-2017	31-12-2017	31-03-2018
☑	⊟ All Customer Groups	4,309,572.686	23,000.000	900,499.000	365,975.006	3,020,098.680
☑	Zamzam Catering Services (CUST-00001)	999.000	0.000	0.000	0.000	999.000
☐	Hospitality Customer (CUST-00003)	4,999.000	0.000	0.000	4,999.000	0.000
☐	Digital (CUST-00006)	41,499.000	0.000	0.000	41,499.000	0.000
☐	Nova Equipments (CUST-00007)	200.000	0.000	0.000	200.000	0.000
☐	Sagar Malhotra (CUST-00014)	2,600,480.000	0.000	0.000	0.000	2,600,480.000
☐	Design Plastics	500.000	0.000	0.000	0.000	500.000
☑	⊞ Individual	675,704.340	10,000.000	242,000.000	84,500.010	339,204.330
☐	⊞ Commercial	880,192.350	13,000.000	658,499.000	129,778.000	78,915.350
☐	⊟ Non Profit	2,999.002	0.000	0.000	2,999.002	0.000
☑	Earth Foundation	1,499.002	0.000	0.000	1,499.002	0.000
☑	Sed Hendrerit Foundation	1,500.000	0.000	0.000	1,500.000	0.000
☐	⊞ Government	101,999.994	0.000	0.000	101,999.994	0.000

Within a few minutes, mastery of the sales data can be achieved. With sales analytics in hand, sales teams can be better supported. Please see the expanded view below to see the complete report.

4. Manufacturing Work in Progress Report

As the name suggest, this report is to show any work orders that are still in progress. This is similar with Open work orders which status is in progress.



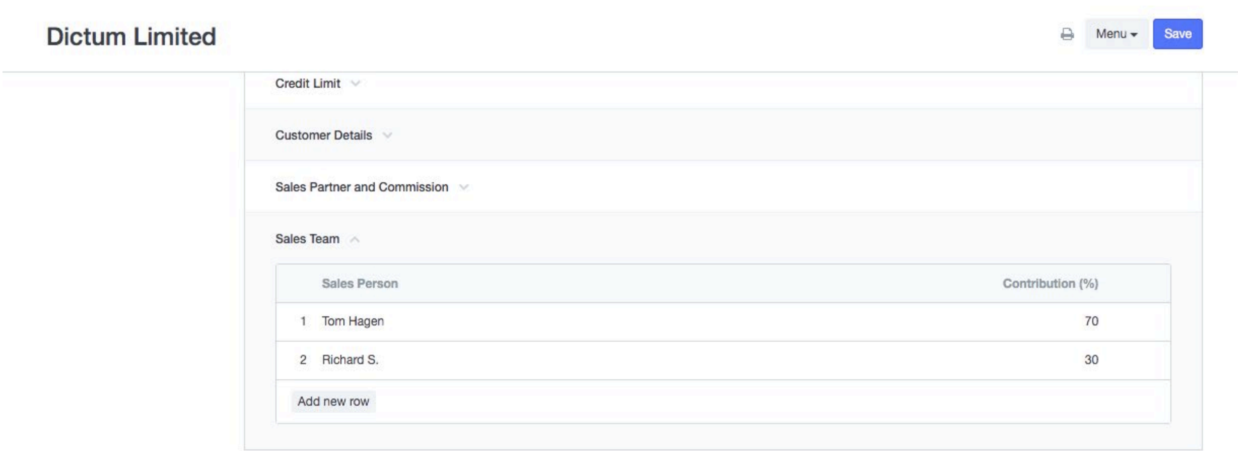
2.1 Article: Sales

1. Sales Persons in the Sales Transactions
2. Request for Raw Materials from Sales Order
3. Applying Discount
4. Close Sales Order

1. Sales Persons in the Sales Transactions

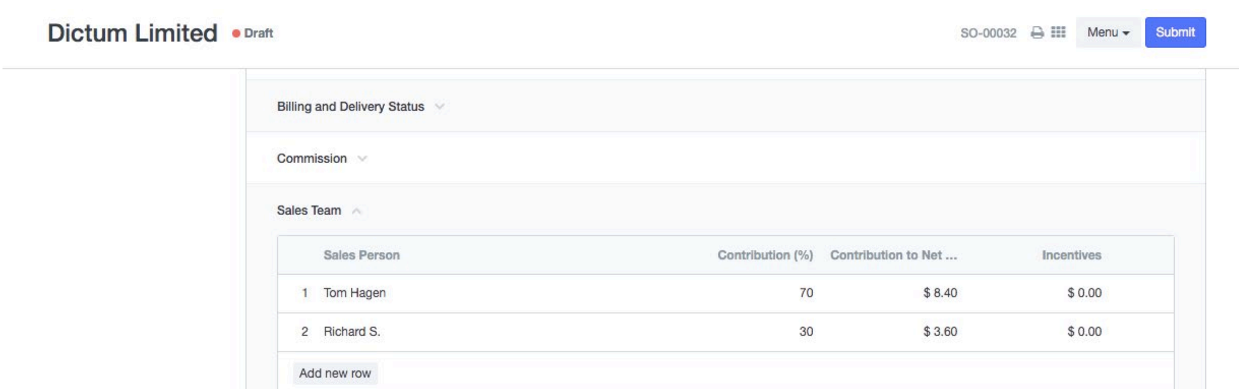
In ERP+, Sales Person master is maintained in tree structure. Sales Person is selectable in all the sales transactions.

Sales Persons can be updated in the Customer master as well. On selection of Customer in the transactions, Sales Persons as updated in the Customer will fetch into sales transaction.



Sales Person Contribution

If more than one sales person is working together on an order, then contribution (%) should be set for each Sales Person.

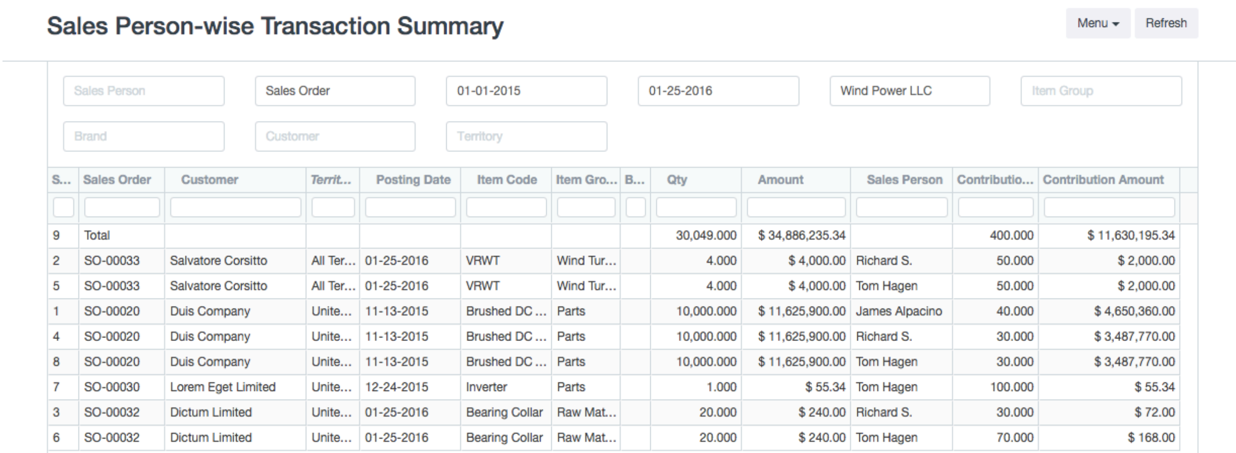


On saving transaction, based on the Net Total and Contribution (%), Contribution to Net Total will be calculated for each Sales Person. Total % Contribution for all Sales Person must be 100%. If only one Sales Person is selected, then % Contribution will be 100.

Sales Person Transaction Report

Check Sales Person's Transaction report from: Selling > Standard Reports > Sales Person-wise Transaction Summary

This report can be generated based on Sales Order, Delivery Note and Sales Invoice. It will give you total amount of sale made by an employee.



S...	Sales Order	Customer	Territ...	Posting Date	Item Code	Item Gro...	B...	Qty	Amount	Sales Person	Contributio...	Contribution Amount
9	Total							30,049.000	$ 34,886,235.34		400.000	$ 11,630,195.34
2	SO-00033	Salvatore Corsitto	All Ter...	01-25-2016	VRWT	Wind Tur...		4.000	$ 4,000.00	Richard S.	50.000	$ 2,000.00
5	SO-00033	Salvatore Corsitto	All Ter...	01-25-2016	VRWT	Wind Tur...		4.000	$ 4,000.00	Tom Hagen	50.000	$ 2,000.00
1	SO-00020	Duis Company	Unite...	11-13-2015	Brushed DC ...	Parts		10,000.000	$ 11,625,900.00	James Alpacino	40.000	$ 4,650,360.00
4	SO-00020	Duis Company	Unite...	11-13-2015	Brushed DC ...	Parts		10,000.000	$ 11,625,900.00	Richard S.	30.000	$ 3,487,770.00
8	SO-00020	Duis Company	Unite...	11-13-2015	Brushed DC ...	Parts		10,000.000	$ 11,625,900.00	Tom Hagen	30.000	$ 3,487,770.00
7	SO-00030	Lorem Eget Limited	Unite...	12-24-2015	Inverter	Parts		1.000	$ 55.34	Tom Hagen	100.000	$ 55.34
3	SO-00032	Dictum Limited	Unite...	01-25-2016	Bearing Collar	Raw Mat...		20.000	$ 240.00	Richard S.	30.000	$ 72.00
6	SO-00032	Dictum Limited	Unite...	01-25-2016	Bearing Collar	Raw Mat...		20.000	$ 240.00	Tom Hagen	70.000	$ 168.00

Sales Person wise Commission

ERP+ only provide total amount of sale made by a Sales Person. If you offer commission to Sales Person, you should add Sales Person as Sales Partners in ERP+. For Sales Partners, you can define Commission (%). On selected on Sales Partner in a sales transaction, based on Net Total, Commission Amount is calculated as well. You can check Sales Partner's commission report from: Accounts > Standard Reports > Sales Partners Commission

2. Request for Raw Materials from Sales Order

Production Plan helps user to plan production against multiple sales orders and helps in Material Procurement planning for the raw-material item, based on the quantity of finished product to be manufactured.

But, when you only need to plan for raw-material items of a single Sales Order, it becomes a bit of a tedious task. Hence, you can create a Material Request for the raw materials of the finished Items present in the Sales Order, from that Sales Order itself.

To do so, you can follow the below steps.

- After your Sales Order has been submitted, click on Make and select Request for Raw Materials.
- It will open a dialog and display all the Finished Items having a BOM.
- Here, you can change the BOM as you want and choose the necessary options.

Suppose, enabling the Include Exploded Items will fetch the Raw Materials from the Exploded Items of BOM and enabling the Ignore Existing Ordered Qty will make a Request even if the required quantities are present.

- Click on Make, and your Material Request will be submitted.

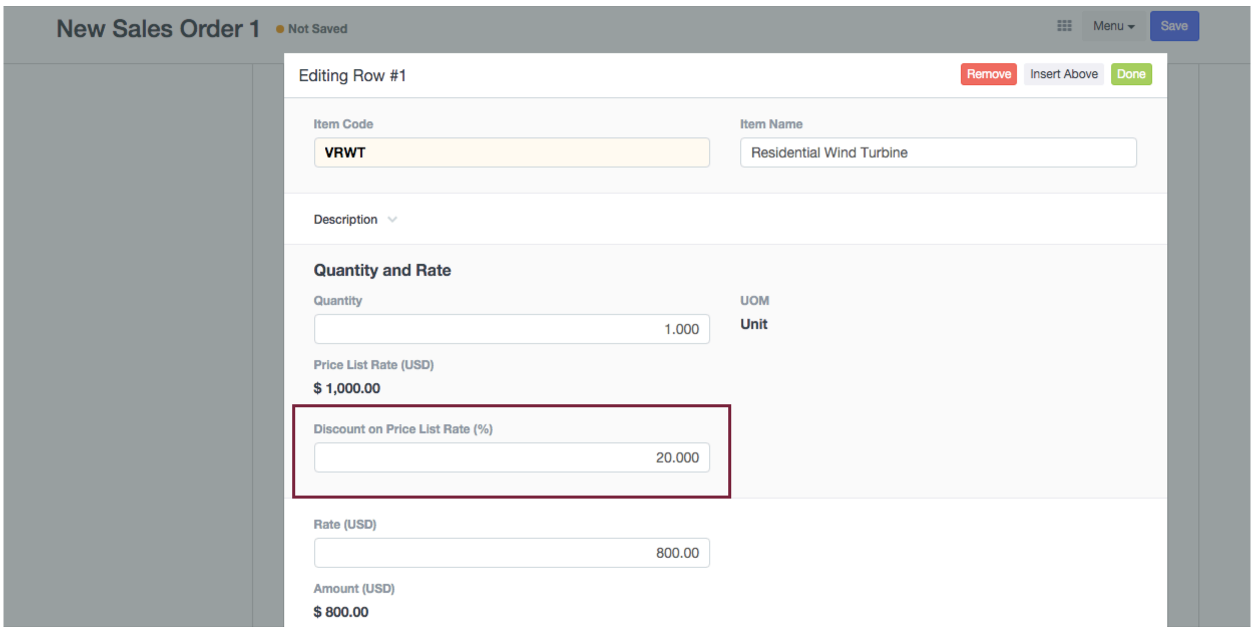
Material Request generated for the Raw Material of the finished Item present in Sales Order.

3. Applying a Discount

There are several ways to apply a Discount on an item in a sales transaction. This can be done in the Sales Order, as well as in a Sales Invoice

1. Discount on "Price List Rate" of an item

You can find the Discount field in the Item table. a Discount can be applied as a percentage or a fixed amount related to the Price List Rate of the Item.

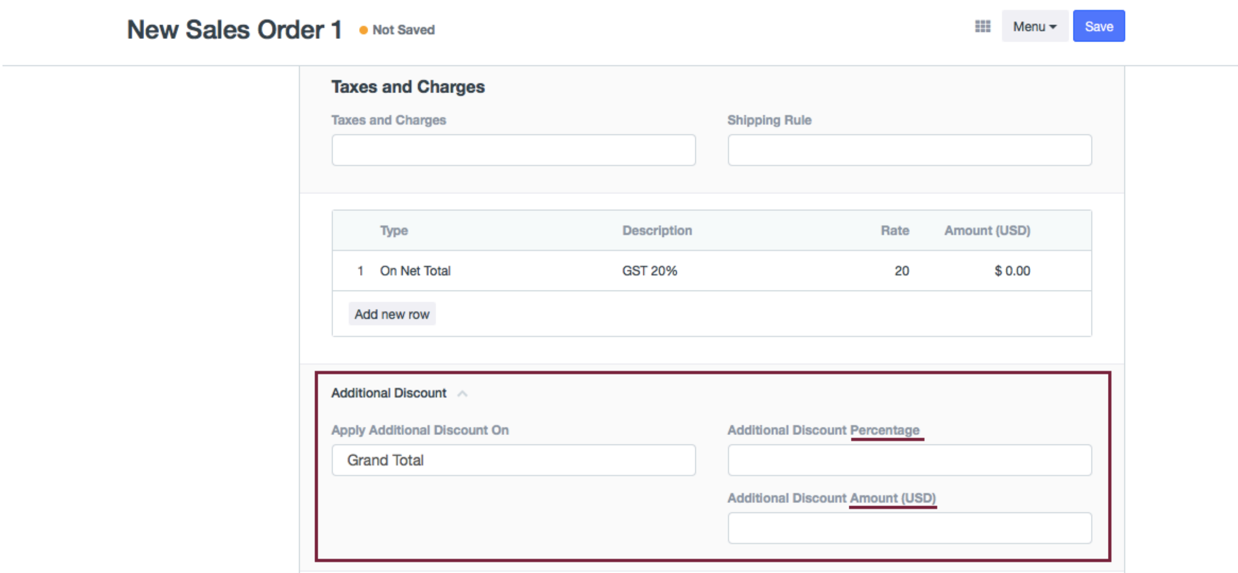


The feature of Discount (%) is available in all sales and purchase transactions.

If you want to apply a discount (as a Percentage) regularly for certain quantities you'd rather use a "Pricing Rule".

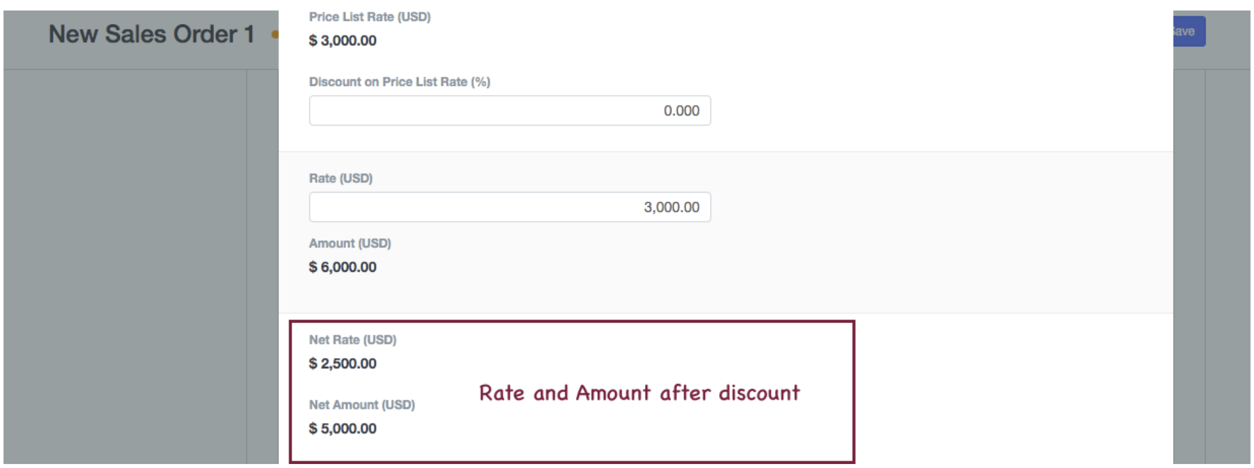
Discount on "Net Total" or "Grand Total"

In the "Additional Discount" section (of a "Sales Order" or "Sales Invoice" alike), you can apply a Discount as a fixed amount or a percentage on the total sum of the Sales.



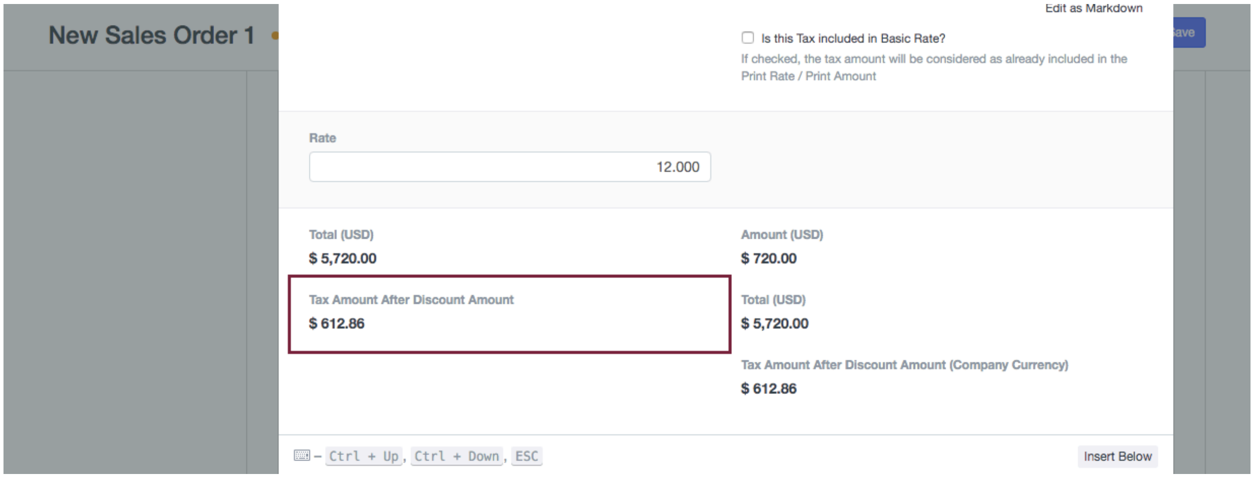
Discount on "Net Total"

If a Discount is applied on **Net Total**, then item's Net Rate and Net Amount is calculated as per the Discount Amount. Net Rate and Amount field will be visible only if Discount is applied using this feature.



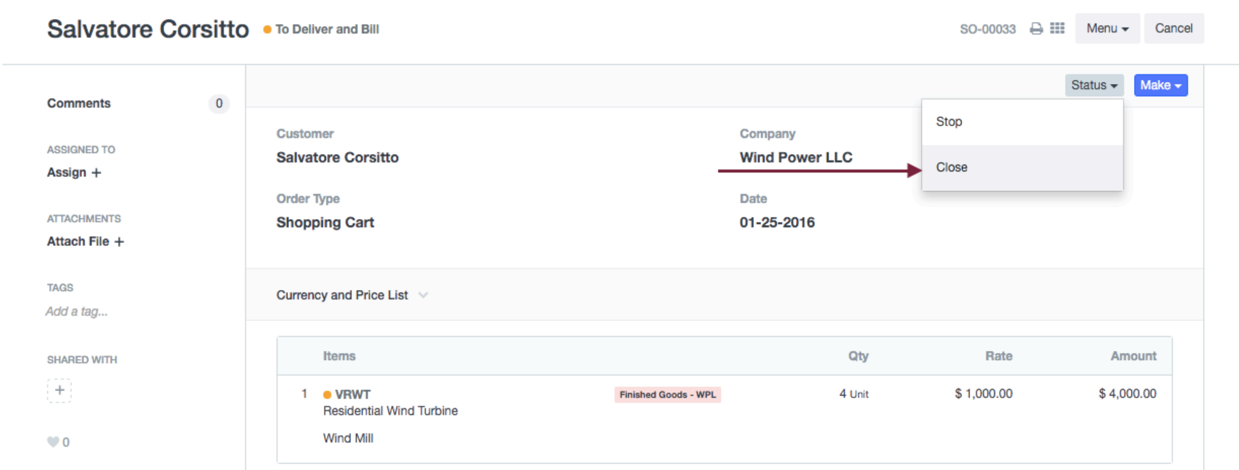
Discount on "Grand Total"

If a Discount is applied based on the Grand Total, then with item's Net Rate, Net Amount as well as taxes are also re-calculated as per Discount Amount.


New Sales Order 1
Edit as Markdown
Is this Tax included in Basic Rate?
If checked, the tax amount will be considered as already included in the Print Rate / Print Amount
Rate
12.000
Total (USD)
$ 5,720.00
Amount (USD)
$ 720.00
Tax Amount After Discount Amount
$ 612.86
Total (USD)
$ 5,720.00
Tax Amount After Discount Amount (Company Currency)
$ 612.86
Ctrl + Up, Ctrl + Down, ESC
Insert Below

4. Close Sales Order

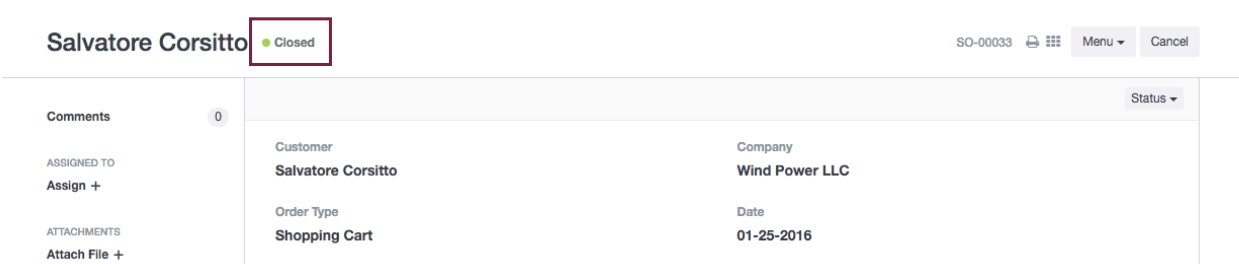
In the submitted Sales Orders, you will find Stop option. Stopping Sales Order will restrict user from creating Delivery Note and Sales Invoice against it.



Scenario

An order is received for ten Wind Turbines. Sales Order is also created for ten units. Due to scarcity of stock, only seven units are delivered to the customer. Pending three units are to be delivered soon. Customer informs that they don't need to deliver pending item, as they have purchased it from another vendor.

In this case, create Delivery Note and Sales Invoice will be created only for the seven units. And the Sales Order should be set as stopped.



Once Sales Order is set as stopped, you will not have pending quantities (three in this case) reflecting in Pending to Deliver and Pending to Invoice reports. To make further transactions against Stopped Sales Order, you should first Unstop it.

You will find same functionality in the Purchase Order as well.

2.2 Article: Advanced

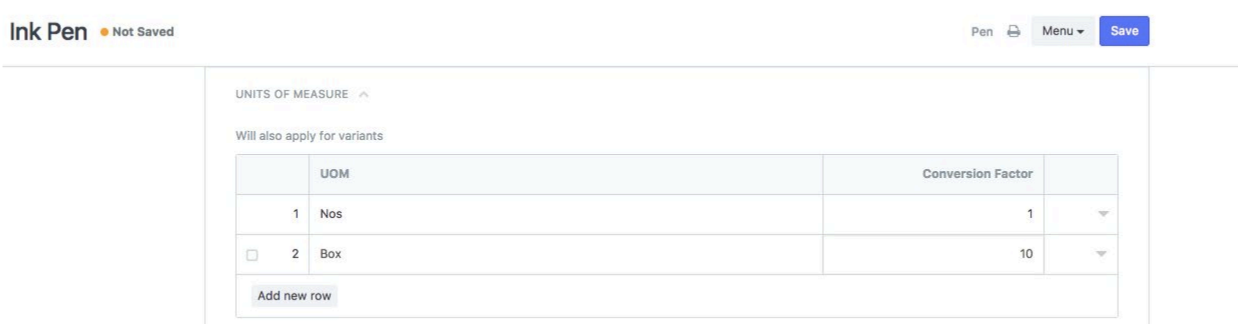
1. Selling in Different UoM
2. Adding Margin
3. Amending Sales Order After Submit
4. Drop Shipping

1. Selling in Different Unit (UoM)

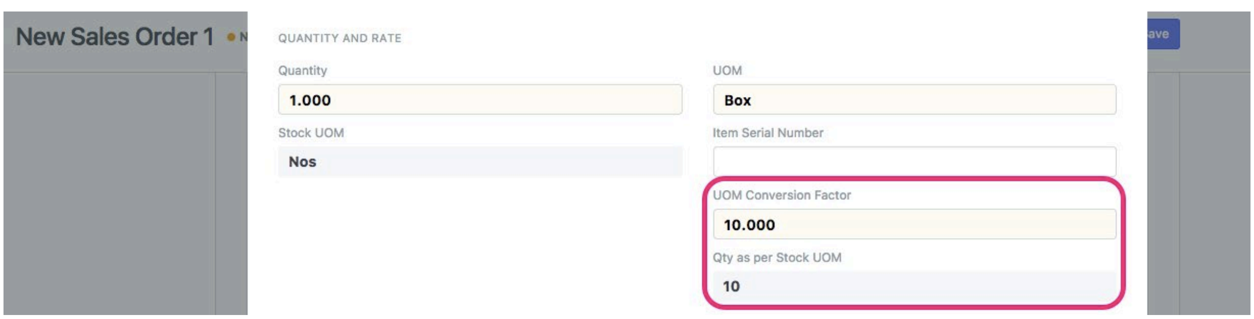
A sell price unit of measure (UOM) is the UOM with which you price items. You can have multiple sell price UOMs for any inventory item. However, when Customer places, UoM for an item could change.

For example, an Item Pen is stocked in Nos, but sold in Box. Hence, we will make Sales Order for Pen in Box.

Step 1: In the Item master, under Unit of Measure section, you can list all the possible UoM of an item, with its UoM Conversion Factor. Update UoM Conversion Factors
In one Box, if you get 10 Nos. of Pen, UoM Conversion Factor would be 10.



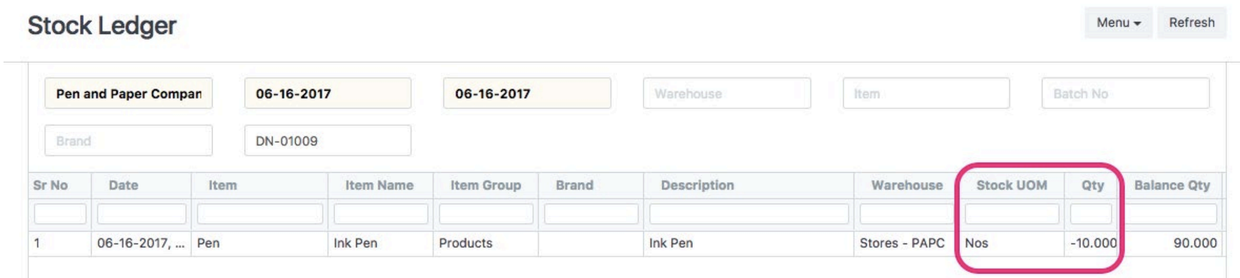
Step 2: In the Sale Order, you will find two UoM fields -UoM - Stock UoM
In both the fields, default UoM of an item will be fetched by default. You should edit UoM field, and select Sale UoM (Box in this case). Updating Sales UoM is mainly for the reference of the Customer. In the print format, you will see item quantity in the Sales UoM.



Based on the Qty and Conversion Factor, qty will be calculated in the Stock UoM of an item. If you sell just one Box, then Qty as per stock UoM will be set as 10.

Stock Ledger Posting

Irrespective of the Sales UoM selected in the Sale Order, stock ledger posting will be done in the Default UoM of an item. Hence you should ensure that conversion factor is entered correctly while selling item in different UoM.


Stock Ledger
Menu
Refresh
Pen and Paper Compan
06-16-2017
06-16-2017
Warehouse
Item
Batch No
Brand
DN-01009
Sr No
Date
Item
Item Name
Item Group
Brand
Description
Warehouse
Stock UOM
Qty
Balance Qty
1
06-16-2017, ...
Pen
Ink Pen
Products
Ink Pen
Stores - PAPC
Nos
-10.000
90.000

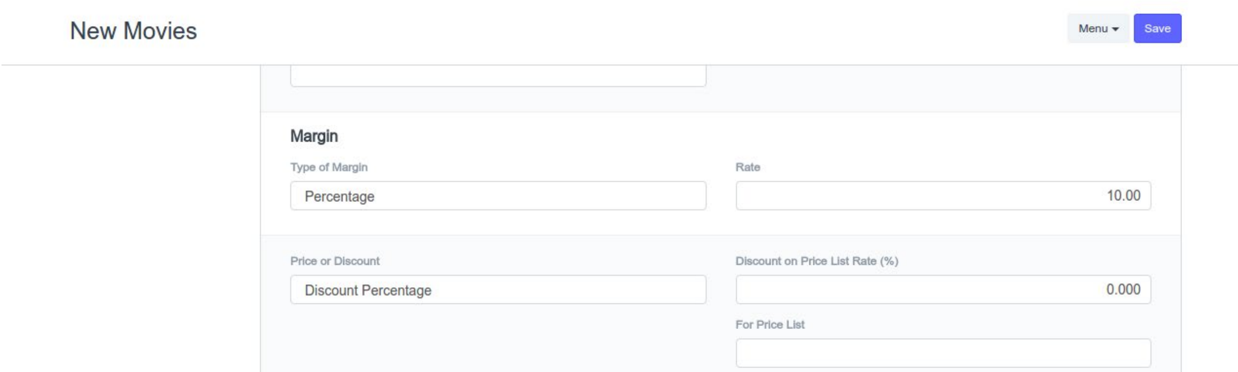
2. Adding Margin

User Can apply the margin on Quotation Item and Sales Order Item using following two options.

- Price Rule: With the help of this method user can apply the margin on Quotation and Sales Order based on condition. You can find the section margin on pricing rule where a user has to select the type of margin whether it is Percentage or Amount and Rate or Amount. The system will apply the margin on quotation item and sales order item if pricing rule is enabled.

To setup Pricing Rule, go to: Selling > Setup > Pricing Rule or Accounts > Setup > Pricing Rule

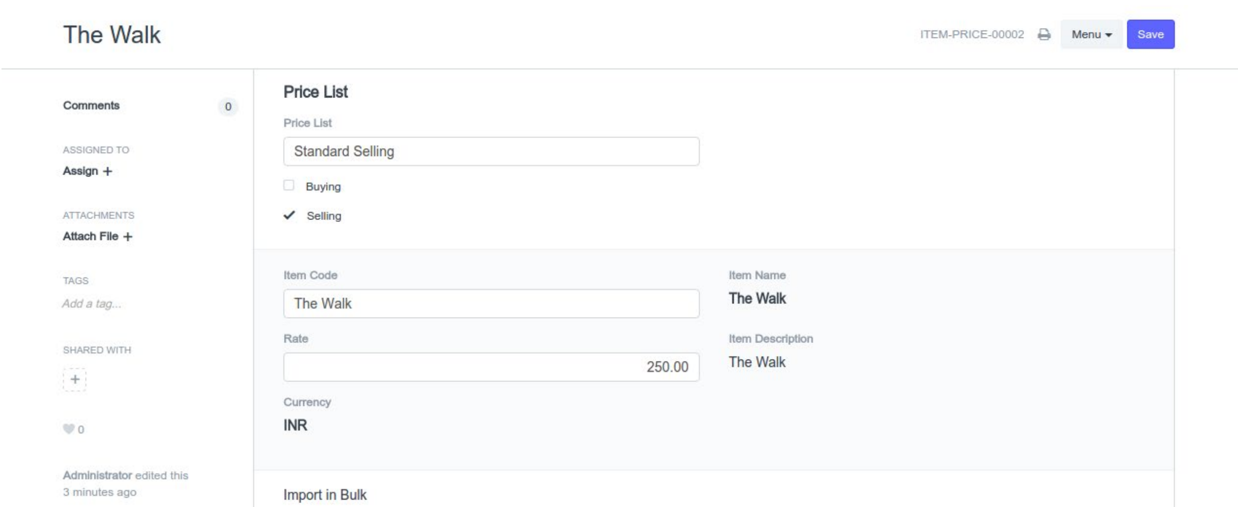
Adding Margin in Pricing Rule



Total Margin is calculated as follows: Rate = Price List Rate + Margin Rate

So, in order to apply the margin, you need to add the Price List for the Item. To add Price List, go to: Selling > Setup > Item Price or Stock > Setup > Item Price

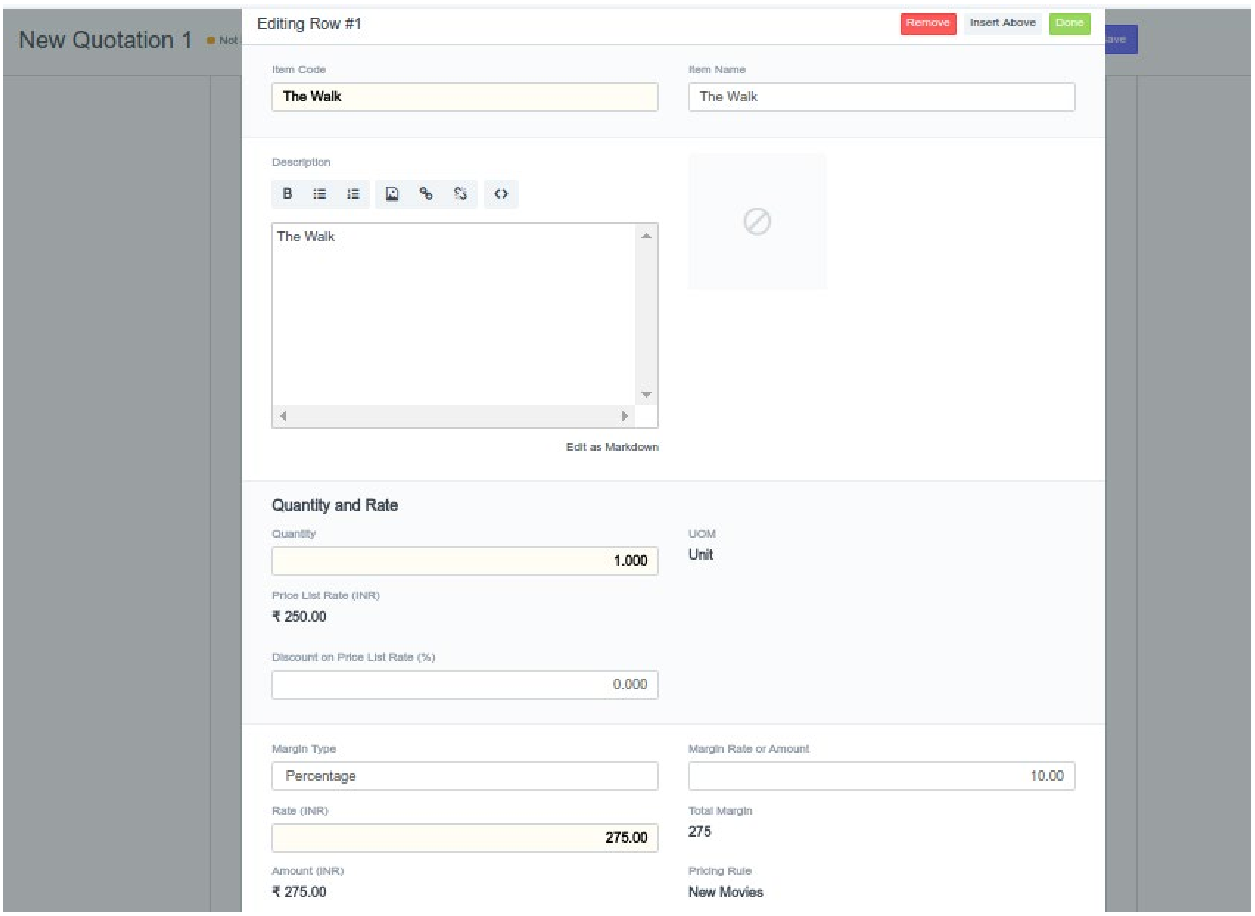
Adding Item Price



- 2) Apply margin direct on Item: If user wants to apply the margin without pricing rule, they can use this option. In Quotation Item and Sales Order Item, user can select the margin type and rate or amount. The system will calculate the margin and apply it on price list rate to calculate the rate of the product.

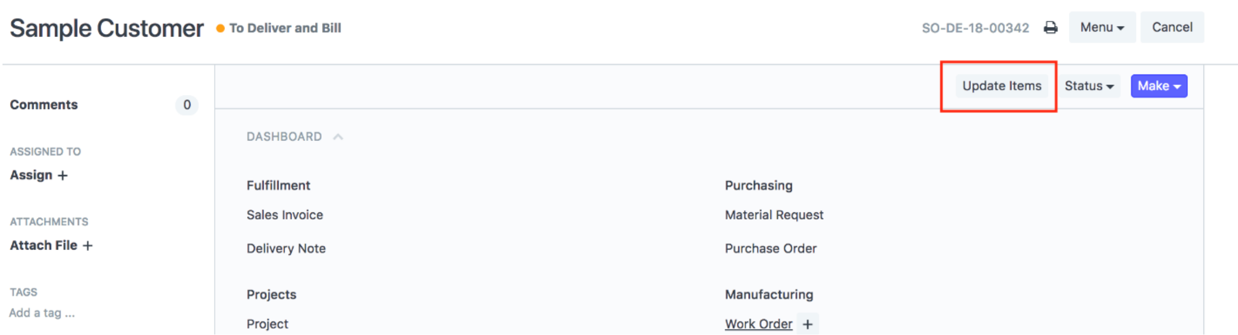
  To add margin directly on Quotation or Sales Order, go to: Selling > Document > Quotation. Add item and scroll down to section where you can find the Margin Type

Adding Margin in Quotation



3. Amending Sales Order after Submit

Rate and Qty in Sales Order can now be amended after Submit using the Update Items button.



To Update Rate and Qty in a Submitted Sales Order, click on the Update Items button. A dialog will pop up to let you make the change.

Please Note the following validations and use cases:

- Update Features checks if Sales Order has Delivery Note and Sales Invoice.
- Qty can be updated for undelivered Sales Order and for Partial Delivery Note. For Sales Order with completed Delivery Notes, it cannot be updated.
- Rate can be updated for un-invoiced and partially-invoiced Sales Order. For Sales Order with submitted Sales Invoice, it cannot be updated.

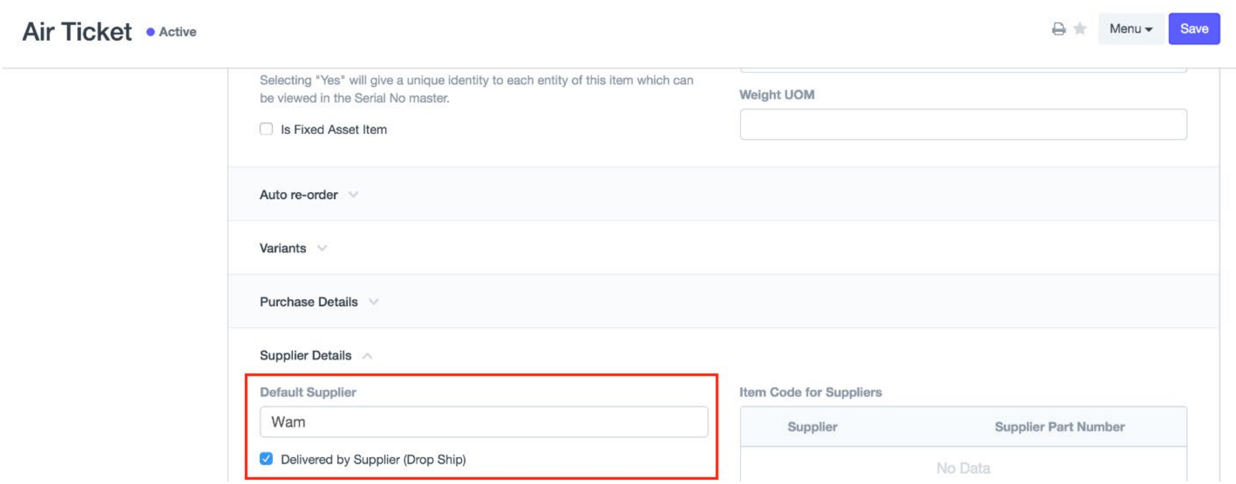
4. Drop Shipping

Drop shipping is a supply chain management technique in which the retailer does not keep goods in stock. Instead they transfer customer orders and shipment details to either the manufacturer, another retailer, or a wholesaler, who then ships the goods directly to the customer

In ERP+, you can create a Drop Shipping by creating Purchase Order against Sales Order. Selling > Documents > Sales Order > Purchase Order

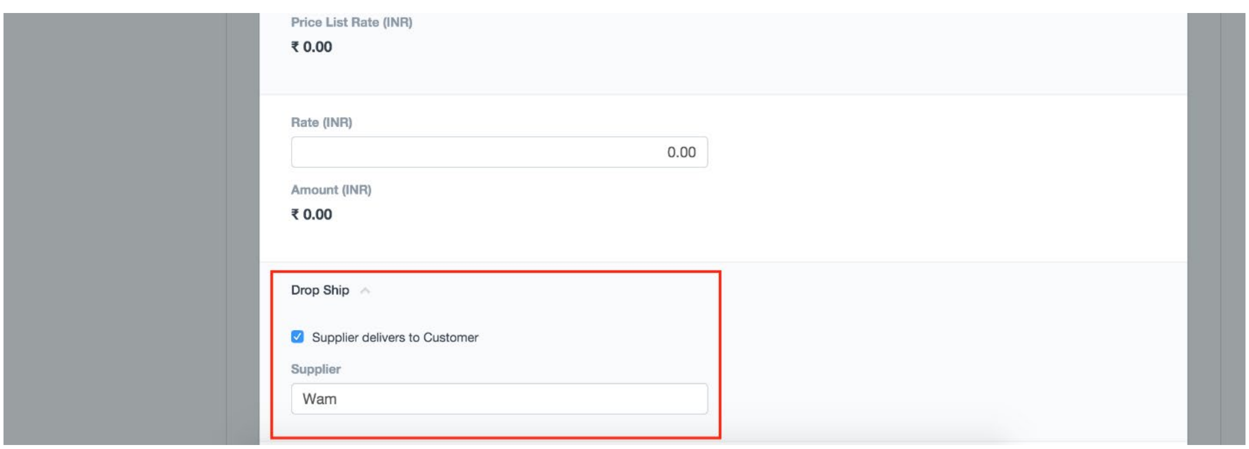
Setup on Item Master

Set Delivered by Supplier (Drop Ship) and Default Supplier in Item Master.



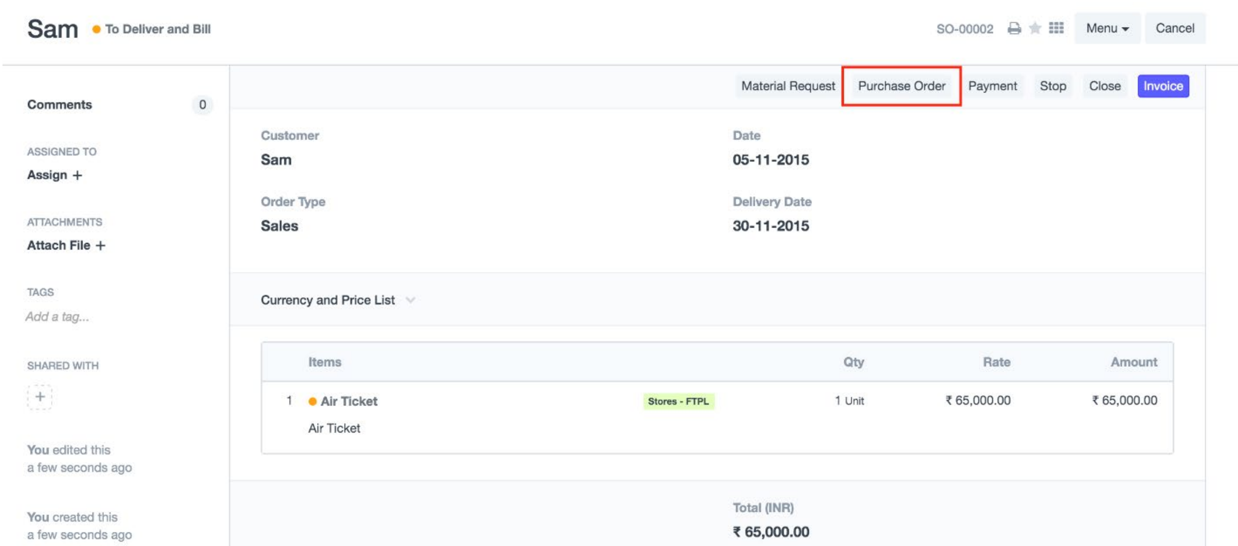
Setup on Sales Order

If Drop Shipping has set on Item master, it will automatically set **Supplier delivers to Customer** and **Supplier** on Sales Order Item. You can setup Drop Shipping, on Sales Order Item. Under **Drop Ship** section, set **Supplier delivers to Customer** and select **Supplier** against which Purchase Order will get created.



Create Purchase Order

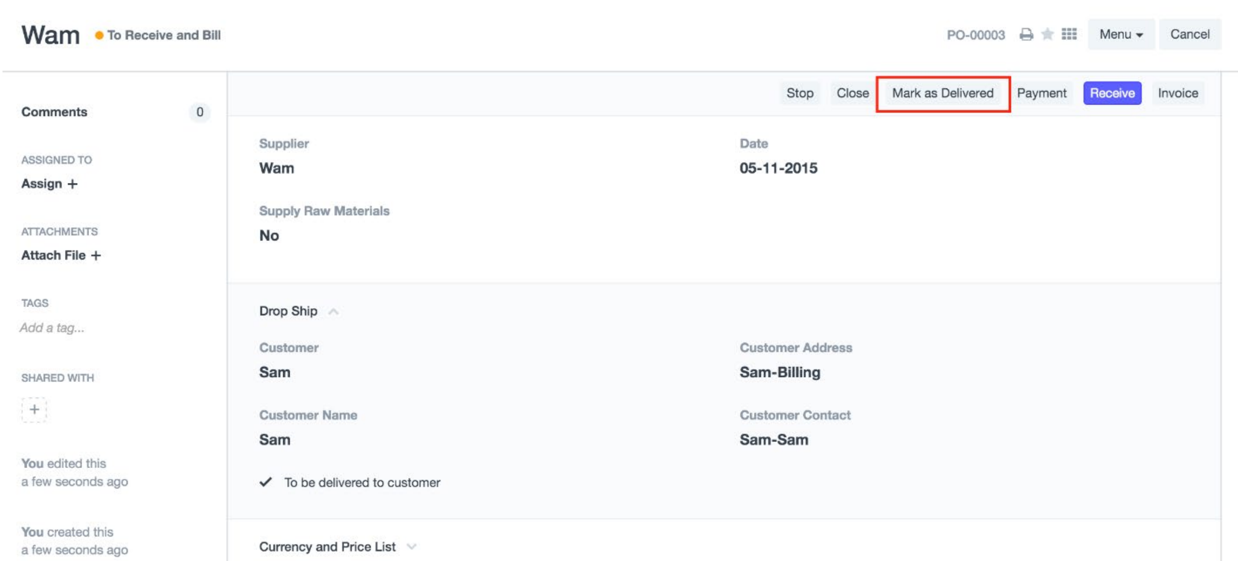
After submitting a Sales Order, create Purchase Order.



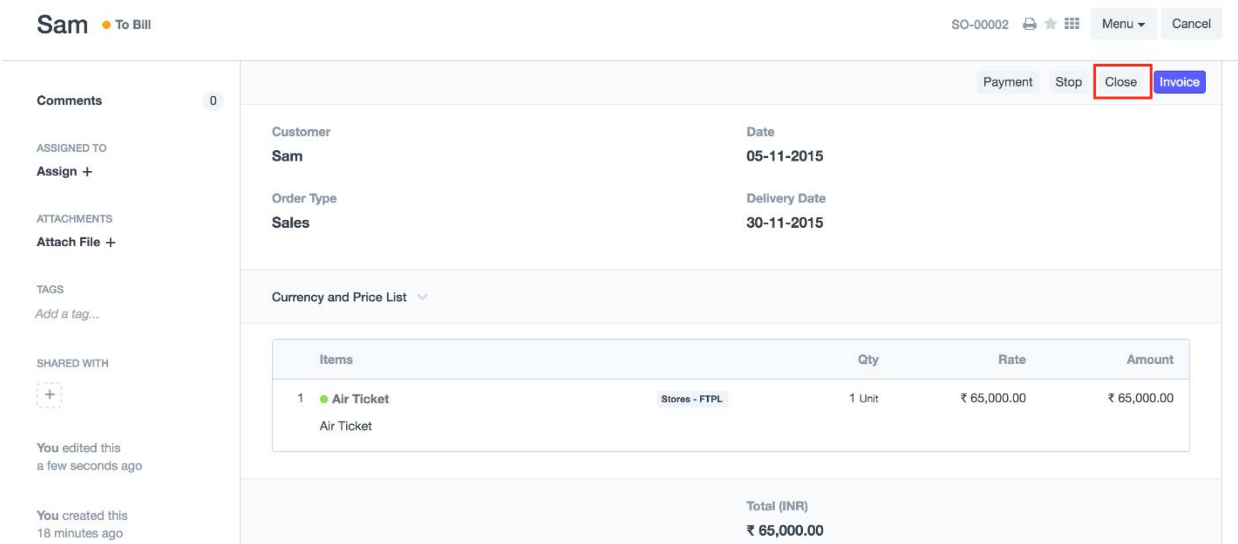
From Sales Order, all items, having Supplier delivers to Customer checked or Supplier (matching with supplier selected on For Supplier popup) mentioned, will get mapped onto Purchase Order.

It will automatically set Customer, Customer Address and Contact Person.

After submitting Purchase Order, to update delivery status, use Mark as Delivered button on Purchase Order. It will update delivery percentage and delivered quantity on Sales Order.

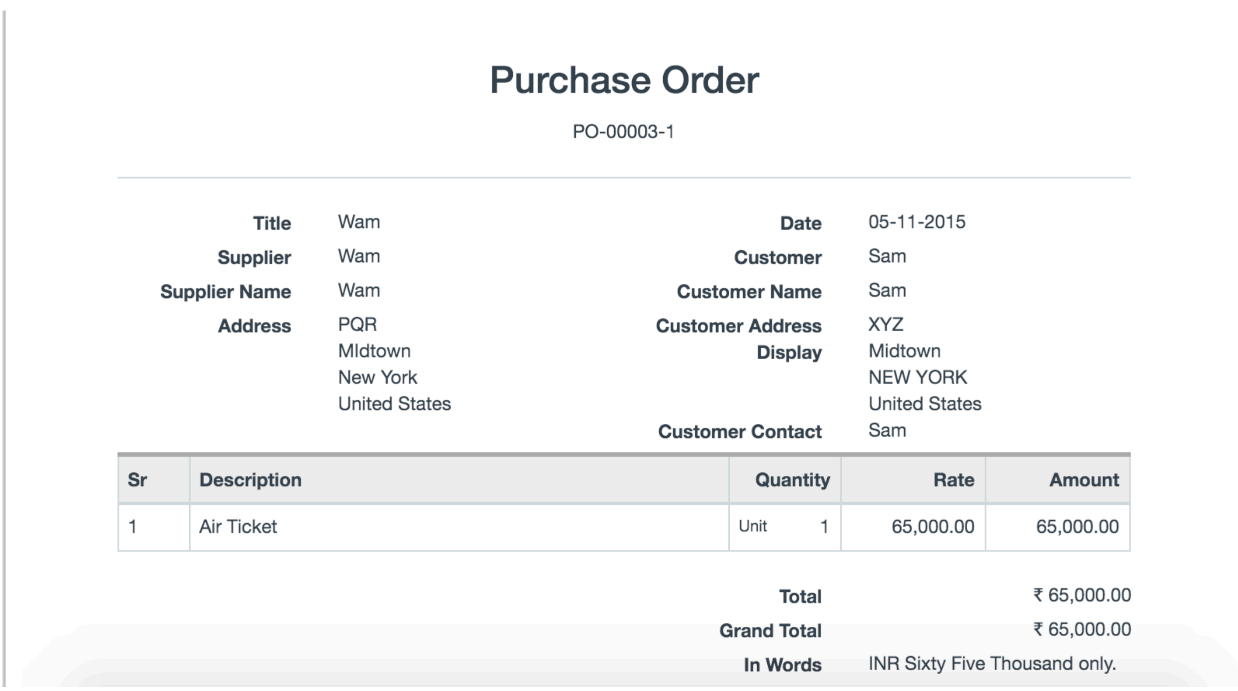


Close, is a new feature introduced on Purchase Order and Sales Order, to close or to mark fulfillment.



Drop Shipping Print Format

You can notify, Suppliers by sending a email after submitting Purchase Order by attaching Drop Shipping print format.



Purchase Order

PO-00003-1

Title	Wam	**Date**	05-11-2015
Supplier	Wam	**Customer**	Sam
Supplier Name	Wam	**Customer Name**	Sam
Address	PQR MIdtown New York United States	**Customer Address Display**	XYZ Midtown NEW YORK United States
		Customer Contact	Sam

Sr	Description	Quantity	Rate	Amount
1	Air Ticket	Unit 1	65,000.00	65,000.00

Total	₹ 65,000.00
Grand Total	₹ 65,000.00
In Words	INR Sixty Five Thousand only.

2.3 Article: Other

1. ERP+ For Services Organization
2. Shipping Rule

1. ERP+ for Service Organization

Question: ERP+ looks primarily designed for the traders and manufacturers. Is ERP+ used by companies offering services?

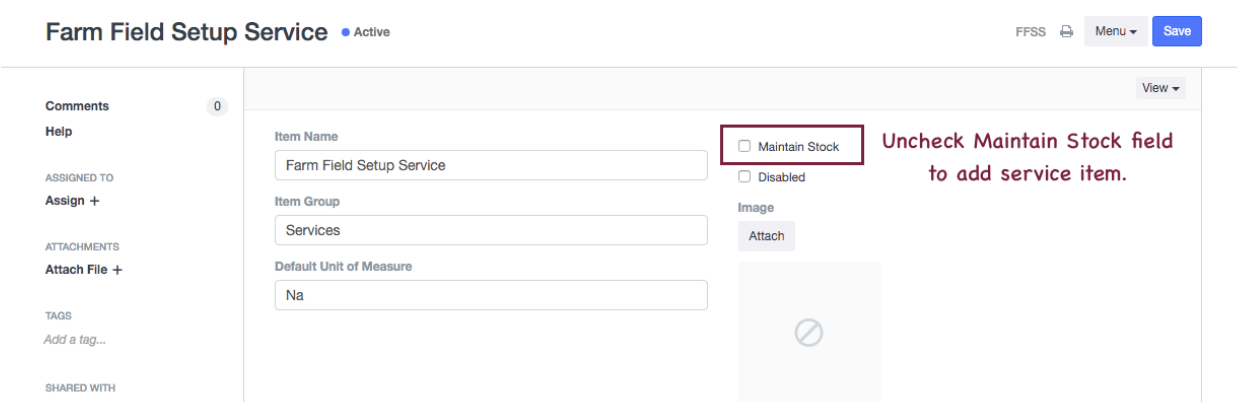
Answer:

About 30% of ERP+ customers are companies into services. These are companies into software development, certification services, individual consultants and many more. Being into service business ourselves, we use ERP+ to manage our sales, accounting, support and HR operations. Check following video to learn how ERP+ uses ERP+.

Master Setup

The setup for a Service company differs primarily for Items. They don't maintain the Stock for Items and thus, don't have Warehouses.

To create a Service (non-stock) Item, in the item master, uncheck "Maintain Stock" field.



When creating Sales Order for the services, select Order Type as **Maintenance**. Sales Order of Maintenance Type needs lesser details compared to stock item's order like Delivery Note, item warehouse etc.

Service company can still add stock items to maintain their fixed assets like computers, furniture and other office equipment.

Hiding Non-required Features
Since many modules like Manufacturing and Stock will not be required for the services company, you can hide those modules from: Setup > Permissions > Show/Hide Modules

Modules unchecked here will be hidden from all the User.

Feature Setup

Within the form, there are many fields only needed for companies into trading and manufacturing businesses. These fields can be hidden for the service company. Feature Setup is a tool where you can enable/disable specific feature. If a feature is disabled, then fields relevant to that feature is hidden from all the forms. For example, if Serial No. feature is disabled, then Serial. No. field from Item as well as from all the sales and purchase transaction will be hidden.

Permissions

ERP+ is the permission-controlled system. Users access system based on permissions assigned to them. So, if user is not assigned Role related to Stock and Manufacturing module, it will be hidden from that User.

You can also refer to help video on User and Permissions setting in ERP+.

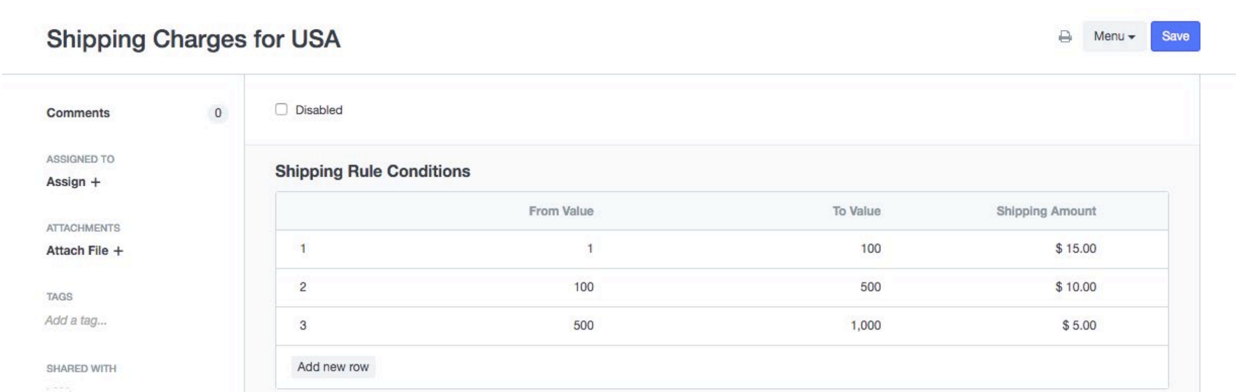
2. Shipping Rule

Shipping Rule master helps in defining a rule based on which shipping charge is applied on a sales transaction.

Most of the companies (mainly retail) have shipping charge applied based on the invoice total. If invoice value is above certain value, then shipping charge applied are lesser. If invoice value is less, then shipping charges applied are bit more than high shipping charges applied on a high value invoice. You can setup Shipping Rule to address the requirement of varying shipping charge based on the Net Total of sales transaction.

To setup Shipping Rule, go to: Selling > Setup > Shipping Rule or Accounts > Setup > Shipping Rule

Shipping Rule Conditions



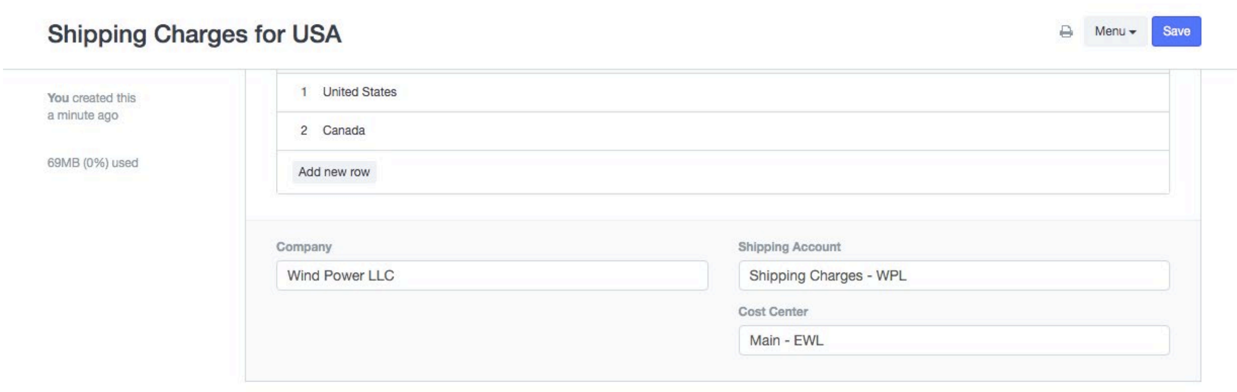
Referring above, you will notice that shipping charges are reducing as value is increasing. This shipping charge will only be applied if transaction total falls under one of the above ranges.

Valid for Countries

You can set Shipping Charges valid for all the countries, or specify specific Country. If specific countries mentioned, then Shipping Charges will be applied only if Customer's country matches Country mentioned in the Shipping Rule.

Shipping Account

If shipping charges are applied based on Shipping Rule, then more values like Shipping Account, Cost Center will be needed as well to add row in the Taxes and Other Charges table of transaction. Hence these details are tracked as well in the Shipping Rule.


Shipping Charges for USA
Menu
Save
You created this a minute ago
69MB (0%) used
1 United States
2 Canada
Add new row
Company
Wind Power LLC
Shipping Account
Shipping Charges - WPL
Cost Center
Main - EWL