Sales Order Management and Logistics Process in AXIUM

Contents

Sales Process:

A. Sales Order
B. Picklist
C. Shipment

Purpose of Sales Orders

Sales Orders are crucial for tracking customer orders, ensuring inventory management, and facilitating the dispatch process. They provide a clear record of customer requests and the details associated with each order.

Importance of Picklists

Picklists streamline the process of gathering items for shipment. They help in managing inventory efficiently and ensure that the correct quantities are prepared for delivery.
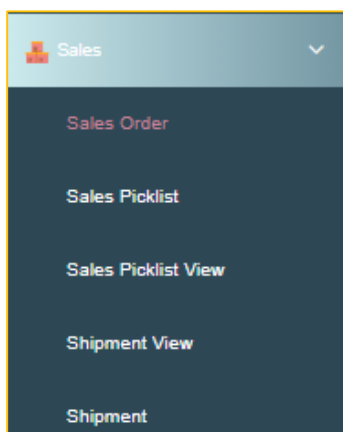
Significance of Shipments

Shipments represent the final step in the sales process, allowing businesses to fulfill customer orders and maintain satisfaction. Proper management of shipments ensures timely delivery and accurate record-keeping.

A. How to create Customer Sales Order

Navigation to Sales Order Screen

On the left side menu bar, click on Sales.

Steps for Sales Order

In the submenu, click on Sales Order to navigate to the Sales Order screen.

Adding a Sales Order

Click the plus icon (+) on the right side to open the modal popup window.

Enter the following details:

Sales Order No: Auto-generated by the system.

Customer Code: Select from the dropdown.

Required Date: Input required date.

Promise Date: Input promise date.

To add product details, click the plus sign (+) again:

Sales Orders

Sales Order No:	Customer-Ref:
	1
Required Date:	Promised Date:
10/28/2024	10/28/2024

Product Code	Required Qty	shipped Qty	Pending Qty	Action
P-1	1000			🗑

+

Save   close

Product Code: Choose from the dropdown.

Quantity: Enter the required quantity.

Click **Save** to create the Sales Order. The status will be set to "**Planned**."

Sales Order No	Customer	Required Date	Promised Date	Status	Action
SO-2410-00001	1	2024/10/28	2024/10/28	Planned	👁 ✎

Search:

Viewing and Editing Sales Orders

Click the **eye** icon to view the Sales Order details.

Click the pencil icon to edit the Sales Order (you can only edit quantity and dates).

Click **Update** Order to save changes.
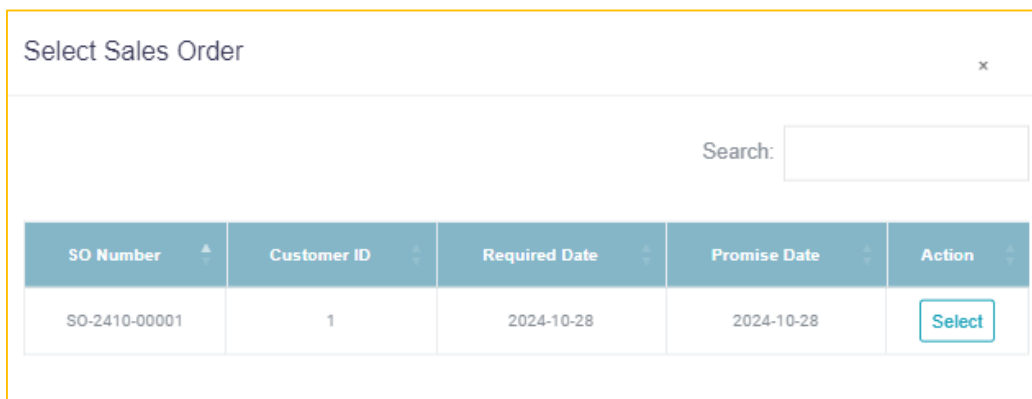
B. Sales Picklist

Steps for Picklist

Navigating to Sales Picklist Screen

In the Sales menu, click on the Sales Picklist submenu.

Adding Products to the Picklist
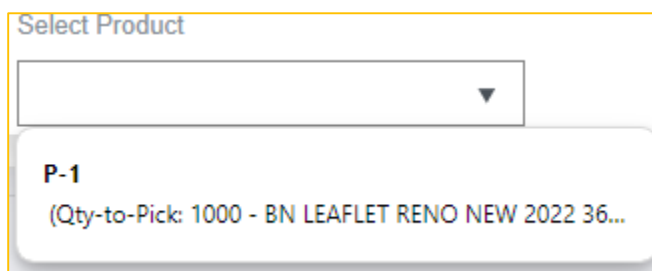
Click the **search** icon to find the Sales Order.

SO Number	Customer ID	Required Date	Promise Date	Action
SO-2410-00001	1	2024-10-28	2024-10-28	Select

Select Sales Order — Search:

In the popup, select the Sales Order and click the Select button.

Choose the product from the dropdown.

Select Product

P-1
(Qty-to-Pick: 1000 - BN LEAFLET RENO NEW 2022 36...

Click **Select Stock** to open the stock selection popup.

Sales-Order: SO-2410-00002   Select Product: P-1   Select Stock

Search by location and select the stock by clicking the action select button.

In Pick Stock window select the product which the Available to pick qty (stock) is sufficient for making picklist or completing the order or Either Select the product Having diff inventory no .

Pick Stock ✕

Required Quantity: 1000

Location :

Search:

Product Ref Code	Inv-Serial No	Available-to-Pick	Location ID	Reference Trans	Picked Stock	Batch lot	Action
P-1	102024/0007-4	2000	2	102024/0007	0	SP1	Select
P-1	102024/0007-5	2000	2	102024/0007	0	SP1	Select
P-1	OE/2410/00005-1	100	1	OE/2410/00005	0	BP20	Select

Close

Click on select button and **Close** the Window the Respective Product with their Inventory details with Qty fetch in the Pick list details in table with batch lot.

Sales-Order				Select Product		
SO-2410-00002	🔍	👁		P-1		≡ Select Stock

Product Ref Code	Inventory Serial No	Qty	Available Qty	Location ID	Reference Trans	Batch lot	Action
P-1	102024/0007-3	500	2000	2	102024/0007	SP1	🗑

Save

Enter the Qty(Ensure the quantity entered does not exceed available stock.)

Understanding Part Picking vs. Full Picking

Part Picking: Enter a partial quantity for the order.

Full Picking: Enter the complete quantity for the order.
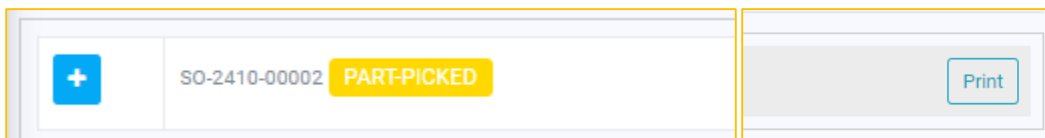
After Picking

Review selected products in the Sales pick list table.

Click **Save** to confirm the stock has been picked successfully.

Track the Status in sales Order Screen which Marked as **"PART-PICKED".**

You can also see the Details of picklist in sales picklist View which shows in below screenshot the status is Coloured in Badge next to the sales Order.

If you want to view the More Details by clicking on plus icon which is locate at left side of Sales order no Which Expands the Details View shows the Picklist no (System is Auto generates after making picklist).
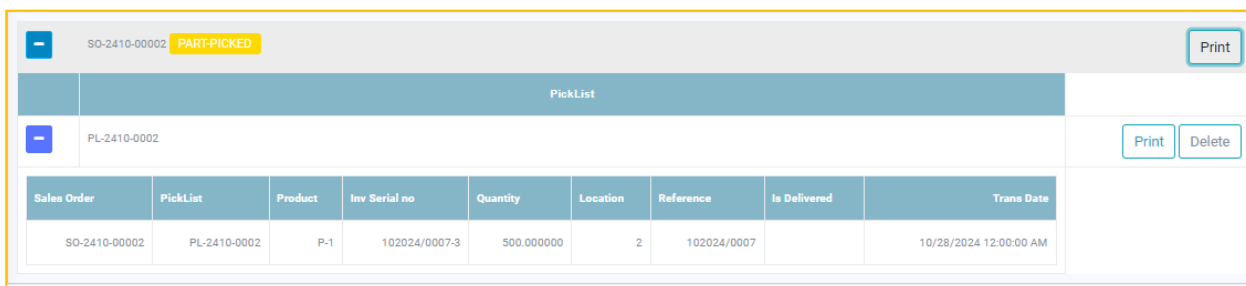
Printing a Picklist

To print a picklist:

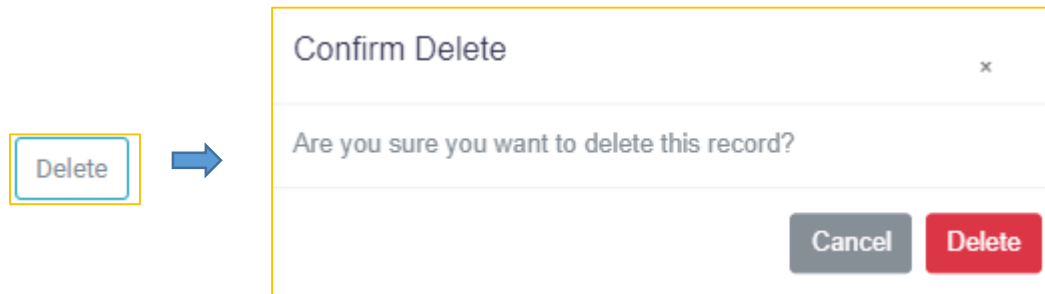In the Sales Picklist screen, find the picklist you wish to print.

Click the **Print** icon, located next to the Delete button.

To delete a picklist:

Click the Delete button next to the picklist entry.

Confirm the deletion when prompted.

After Picked you have to do Shipment/Dispatch which represent the final step in the sales process.

C. Executing Shipments

Steps for Shipment

Navigating to the Shipment Screen

Click on the Sales Order menu, then navigate to the Shipment submenu.

Creating a Shipment

In the header, locate the Sales Order field and click the **search** button.

In popup shows shipment details, including customer information and expected date.

In the popup, select the Sales Order number you wish to ship and click **Select** which status is Part-picked /Full-picked.

SO Number	Customer ID	Required Date	Promise Date	Status	Action
SO-2410-00001	1	2024-10-28	2024-10-28	Full-Picked	Select
SO-2410-00002	1	2024-10-28	2024-10-28	Part-Picked	Select

Select Sales Order   Search:

Enter shipment Header details, including customer information and expected date, Ship-To of Customer and Currency.

Click on **choose from pick list** for choosing shipment against the sales order.

In the Pick Stock popup, shows the product code and quantity with picklist number which you want to make shipment, then click on **Pick** button(You cannot choose the Same picklist again).

Pick Stock

PickList Number	Product	Quantity	Action
PL-2410-0002	P-1	500	Pick

Close

By clicking on pick the Product details fetch in the Shipment details table

Choose the unit, enter rate. The system will calculate totals automatically.

Optionally, enter freight and discounts, then click **Save** to complete the Part shipment.

If you want to do the Full shipment You have to Did the Process from Picklist to Shipment Like Above the Variation in Qty will be view in the Stock View.

Viewing Shipment Details

Navigate to the Shipment View to see all shipment details.

Expand for more detailed views of each shipment.

	Shipment Number	Customer ID	Ship To	Currency	Sales Date	Expected Date	Sales No	Freight	Discount	Grand Total	Action
⊖	SP-2410-00001	1	loreal India Pvt. Ltd	INR	2024/10/29	2024/10/29	SO-2410-00002	0.000000	0.000000	1180.000000	Print

Items For shipment

Product Ref Code	Description	All Qty	Unit of Measure	Rate	Price	IGST	CGST	SGST	Total Tax	Total Price
P-1	BN LEAFLET RENO NEW 2022 3612623338629	500.000000	UN	2.000000	1000.000000	18.000000	0.000000	0.000000	180.000000	1180.000000

By clicking on Print button to Prints the report For More Information about Shipment

Sales Invoice

SO Number : SO-2410-00002

Sales Date : 29/10/24

Shipment No : SP-2410-00001

Dispatch From	Ship-To
Entity Name : Aarish|Paccor Ltd	**Ship To:** L'Oreal India Pvt. Ltd
Bill To : 1	**Address:** L'Oreal India Pvt LtdPlot No 147, Epit, Phase No 1, Jaharmaji, Baddi, H.P 173205
Address : Plot No.622 & 623 New G.I.D.C. Gundlav Valsad 396035	**State:** HP
State: GJ	**PinCode:** 173205
Contact No :	

Product	Qty	UOM	Rate	IGST	CGST	SGST	Tax Amount	Price
P-1 (BN LEAFLET RENO NEW 2022 3612623338629)	500.00	UN	2.00	18.00%	0.00%	0.00%	180.00	1000.00 (INR)
TOTAL							180.00	1180.00
FREIGHT								0.00
DISCOUNT								0.00
GRAND TOTAL								1180.00

Checking Sales Order Status

The Sales Order screen updates to reflect the current status **(e.g., "Part-Picked", "Full-Picked", "Part-Picked-Part-Shipped", "Full-Picked-Full Shipped")** based on your actions.

Navigate to the **Sales Picklist View** to track picking progress.

We can also add the color for each status.

Understanding Status Updates

As orders progress through picking and shipping, the system updates the status automatically.

Regularly check the status to ensure timely processing and fulfillment.

Checking Stock Situation and Sales Progression

Navigating to Stock View

Open the Stock View Window:

In the left side menu bar, locate and click on the Sales Progression submenu.

Dashboard Overview

Sales Plan: Displays the planned sales figures.

Available for Shipping: Shows current stock that is ready for dispatch.

Totals Shipped: Indicates the total quantity of items shipped.

Active Stock: Lists the inventory that is currently available.

Viewing Sales Progression

Access the Sales Progression Table:

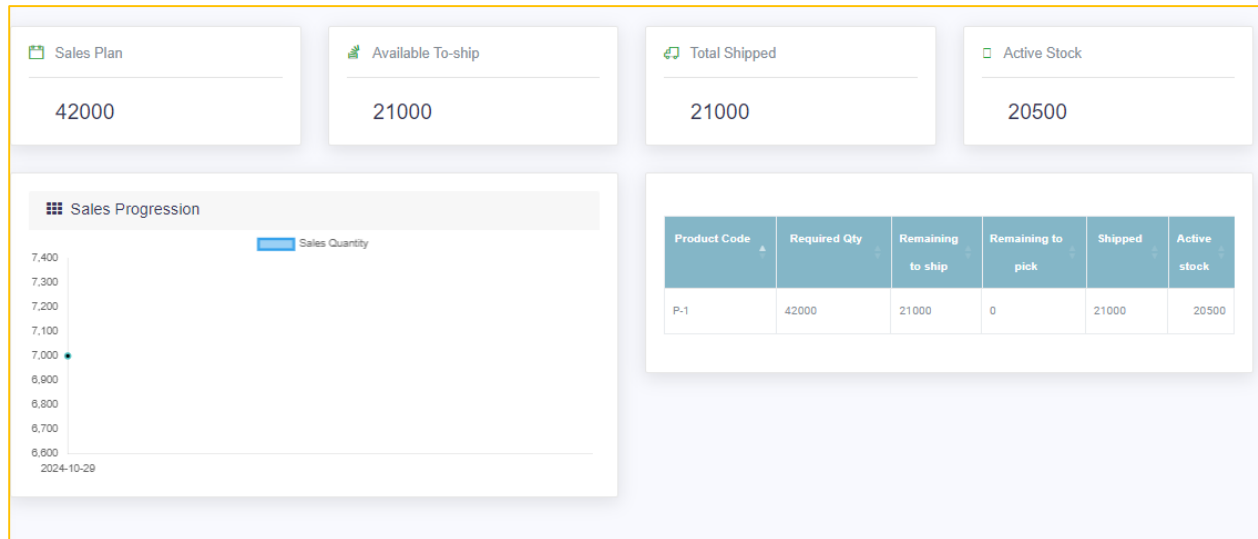Click on the Product Code in the right side table to access detailed charts.

Sales Progression Chart:

The chart will display:

Dates of Shipment: X-axis represents the timeline of shipments.

Sales Quantity: Y-axis indicates the quantity sold over time.

Below Is the Screenshot which Shows the Progression.

Sales Plan	Available To-ship	Total Shipped	Active Stock
42000	21000	21000	20500

Sales Progression

Sales Quantity

7,400
7,300
7,200
7,100
7,000 •
6,900
6,800
6,700
6,600
2024-10-29

Product Code	Required Qty	Remaining to ship	Remaining to pick	Shipped	Active stock
P-1	42000	21000	0	21000	20500

This visualization helps in tracking trends and making informed decisions regarding inventory and sales strategies.

How to perform customer Return:

How to Process a Customer Return and Add Returned Stock

If a customer returns stock due to any issues after material dispatch, you can record the return and update the stock inventory using the following steps. This process ensures accurate tracking and updates the system with the returned product details.

Steps to Add Returned Stock from Customer

Navigate to Manage Stock:

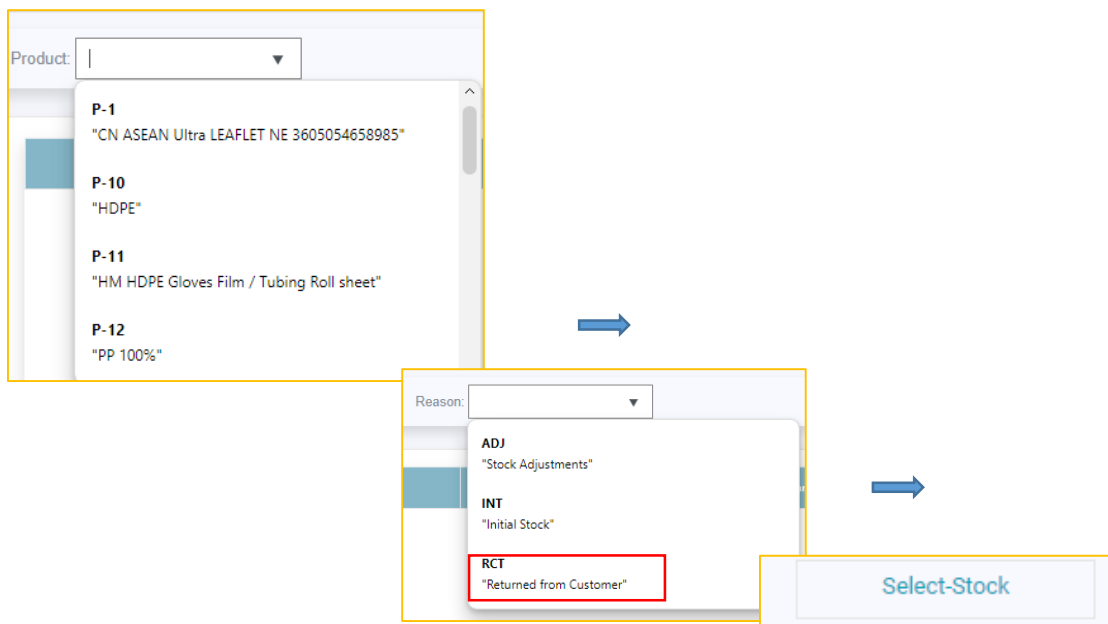In the Left Side Menu, locate and click on Manage Stock.

From the dropdown options under Manage Stock, select Stock-In. This will take you to the Stock-In screen where you can add the returned stock.

Select the Product:

In the Product dropdown, select the specific product that is being returned by the customer. This will populate the product details for the return process.

Choose the Return Reason:

From the Reason dropdown, select the reason for the return. Choose "Return from Customer" to ensure the system understands this return is due to customer-related issues.

Select Stock for Return:

Click the Select Stock button to open a modal popup.

In the popup, you will see a list of the products available for return. Tick the boxes next to the inventory serial numbers of the items that are being returned.

Confirm Selected Items:

After selecting the appropriate products and inventory serial numbers, click the Select button to confirm your choice.

Stock Selection

	Product Code	Inventory Serial No.	Location	Quantity
☐	P-1	OE/2411/00004-1	5	1000
☑	P-1	OE/2411/00005-1	5	0
☐	P-1	OE/2411/00008-1	5	0
☐	P-1	OE/2411/00010-1	5	100

Select   Close

Review the Details Table:

The system will now display the selected stock in the details table. You will see a list of the products, their corresponding serial numbers, and other relevant information.

Enter In-Quantity:

In the In-Qty field, enter the quantity of the product being returned. This should match the number of units the customer has returned to you.

Save the Return:

Once the quantity is entered, click Save. The stock will now be added back into your inventory system under the "Return from Customer" category.

Product: P-1		Reason: RCT			Select-Stock		Save	
Product Code	Inv SerialNo	Qty	Location ID	Trans Ref	In-Qty	Org Qty	Action
P-1	OE/2411/00005-1	0	5	OE/2411/00005	100	500	🗑

Confirmation:

A confirmation message will appear, stating that the stock has been successfully added to the respective product with the correct inventory number.

Verify Stock Situation:

To view and confirm the updated stock levels, you can navigate to the Stock View Window. This window will show you the current stock situation, including any returns that have been processed.