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Version 1.0

Publication date 06/23/2023

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Document: Idempiere First Steps (core)

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Made in Colombia

Introduction

Business Partner is the generic name for all the people/companie with a business relationship with your client/tenant: that includes, vendors, customers, employes and so on. Sometimes we need to configure groups, taxes and other specific properties for invoicing or to manage them properly, so please be sure that you understand the following capabilities for them

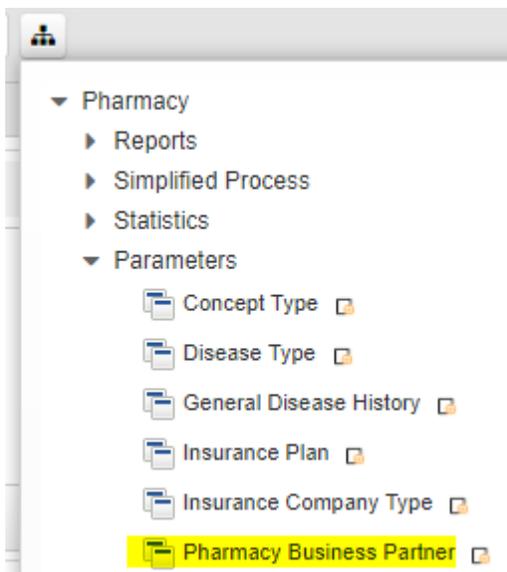
1. Creating a Business Partner

**Example with a pharmacy optimized ERP*

The Pharmacy Business Partner window allows you to define any partner with whom you perform transactions.

There are different types of Business Partners, these include: Customers, Vendor or Suppliers, Employees and Sales Representatives each one of these represent a different role and function within the company.

Pharmacy → Parameters → Pharmacy Business Partners



1.1. Customers

1.1.1. Introduction

A customer is a subject or entity that accesses resources, products or services provided by another. For business, the customer is the individual who, through a financial transaction, acquires a product and / or service of any kind (technological, gastronomic, decorative, furniture or property, etc.). A customer is synonymous with a buyer or consumer.

A customer corresponds to a business partner with whom the company makes sales transactions and of which special information such as account statements, credit quota, discounts granted, price list, among others are needed. In Idempiere/SmartERP, the qualification of the Customer is granted to a business partner created, for which you will see that the windows and the concepts will always refer to the Business Partner. The above means that a Business Partner can be marked as a customer and in turn as an employee and as a vendor (supplier).

1.1.2. Business Partner Group

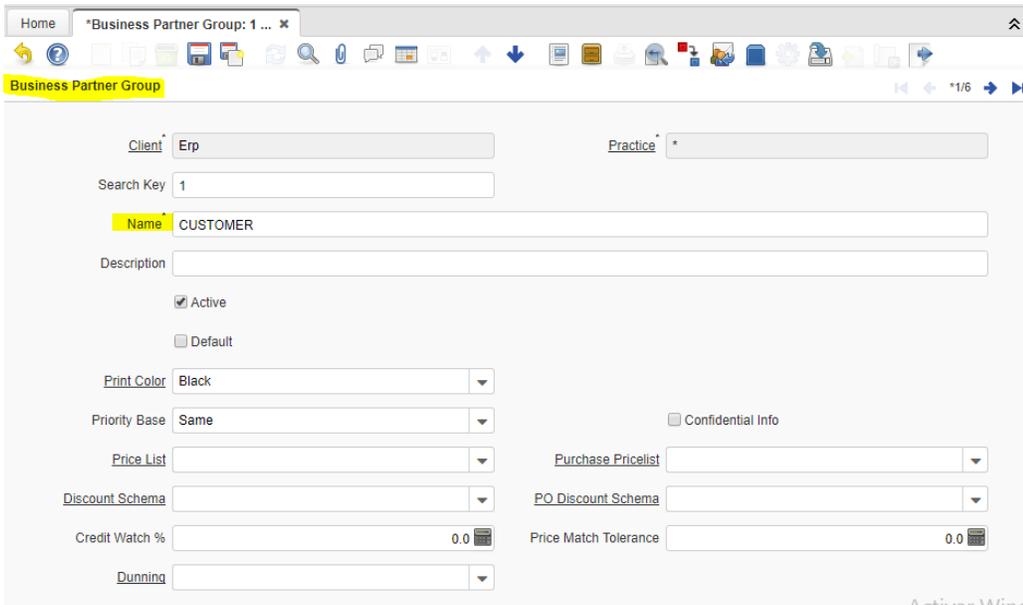
The Customers are created first instance as business partners and selecting the Customer field. A business partner group must be assigned to the registry.

Menu – Advanced ERP - Partner Relations – Business Partner Rules - Business Partner Group

In Idempiere/SmartERP it is possible to group the business partner by similar characteristics through this group option of third parties, either to generate reports or carry out massive processes such as changes in accounting accounts, price lists and discounts.

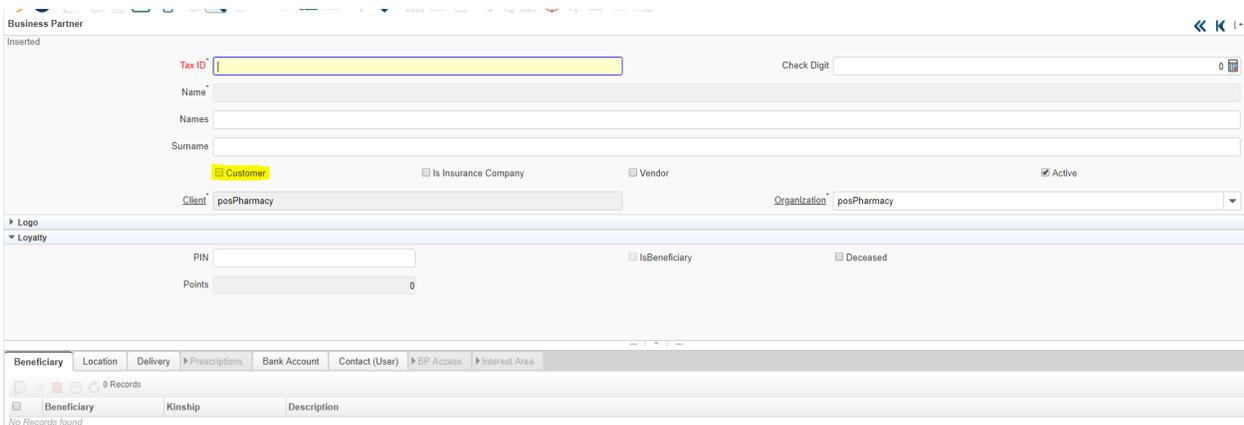
You can create N groups of business partners in Idempiere/SmartERP for example: PARTNERS, VIP CLIENTS, INTERNAL CLIENTS, STAR SUPPLIERS ..

As an example, the following Customer registry is created:



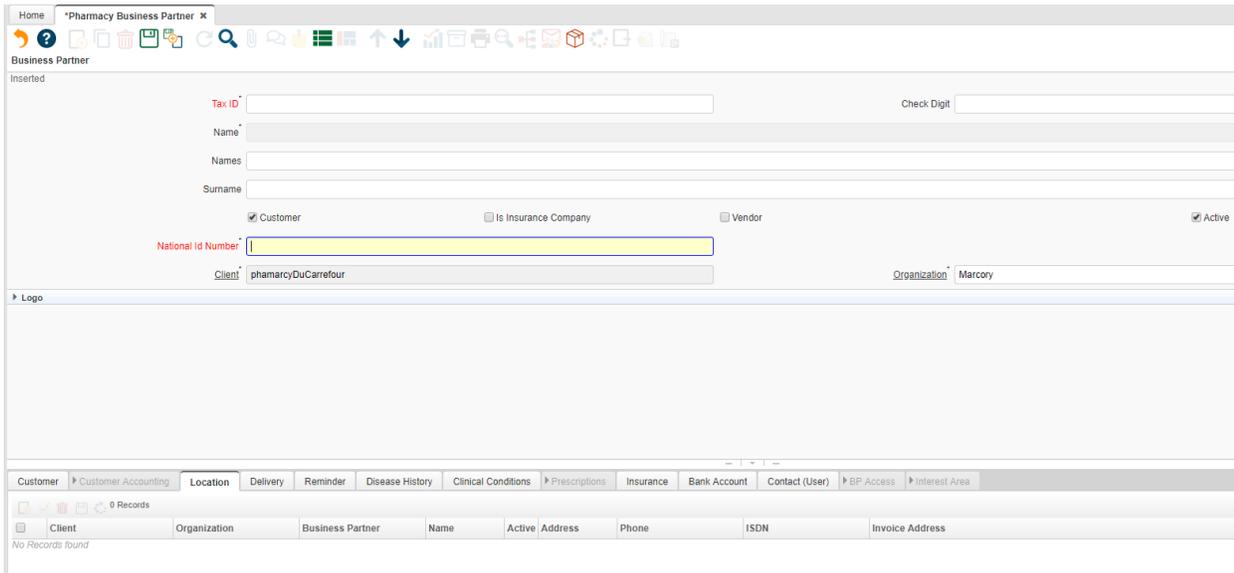
1.1.3. Configuration

You will see the following window, not all of the fields are required.



Mark the Customer checkbox, you will see that new Tabs appear on the screen related to the customer functionality.

Essential Fields for Customer: Names, Surname, National ID Number, PIN for transactions related to loyalty and other advanced features.



Additional fields (not mandatory) with impact on sales

Invoice Rule: The Invoice Rule defines how a Business Partner is invoiced and the frequency of invoicing.

Invoice Schedule: The Invoice Schedule identifies the frequency used when generating invoices.

Payment Rule: The Payment Rule indicates the method of invoice payment.

Payment Term: Payment Terms identify the method and timing of payment.

Delivery Rule: The Delivery Rule indicates when an order should be delivered. For example should the order be delivered when the entire order is complete, when a line is complete or as the products become available.

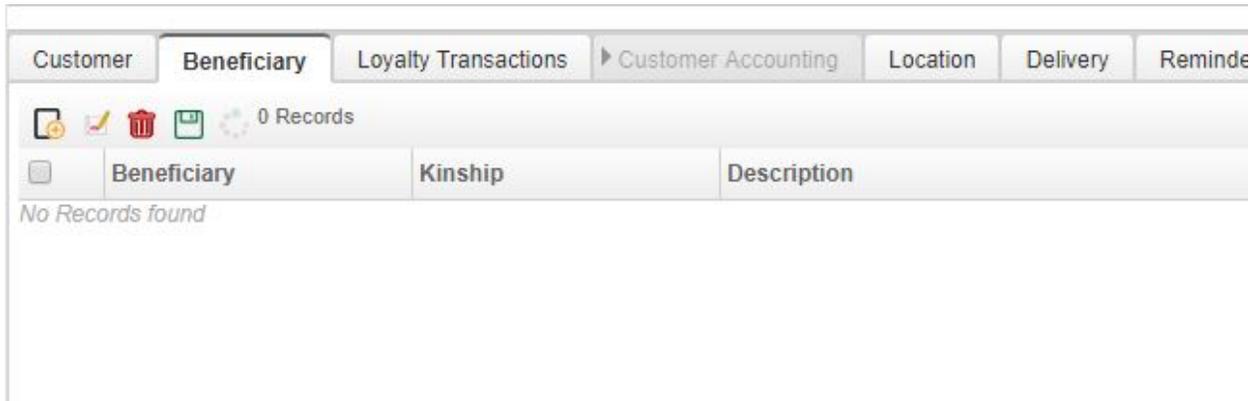
Delivery Via: The Delivery Via indicates how the products should be delivered. For example, will the order be picked up or shipped.

Price List: Price Lists are used to determine the pricing, margin and cost of items purchased or sold.

Discount Schema: After calculation of the (standard) price, the trade discount percentage is calculated and applied resulting in the final price.

Flat Discount %: Flat discount percentage

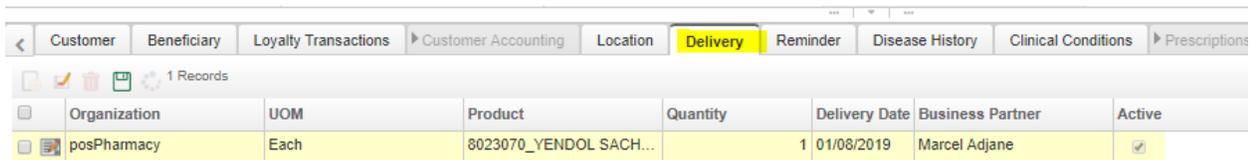
Beneficiary TAB (Loyalty Program and Insurance Inheritance)



Beneficiary	Kinship	Description
No Records found		

Delivery TAB

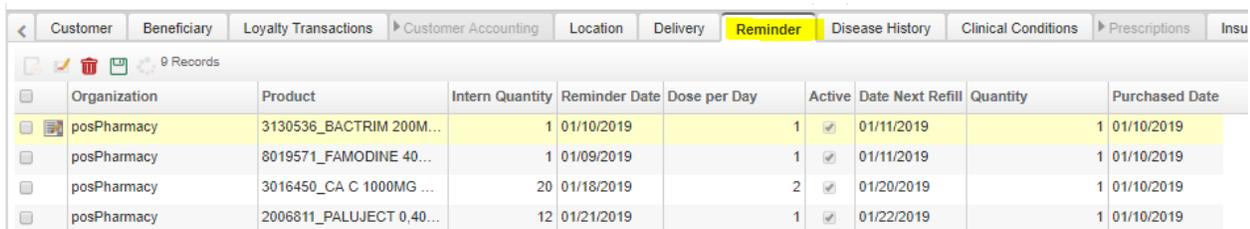
Shows the products that were purchased without having stock and are pending to be delivered.



Organization	UOM	Product	Quantity	Delivery Date	Business Partner	Active
posPharmacy	Each	8023070_YENDOL SACH...	1	01/08/2019	Marcel Adjane	<input checked="" type="checkbox"/>

Reminder TAB

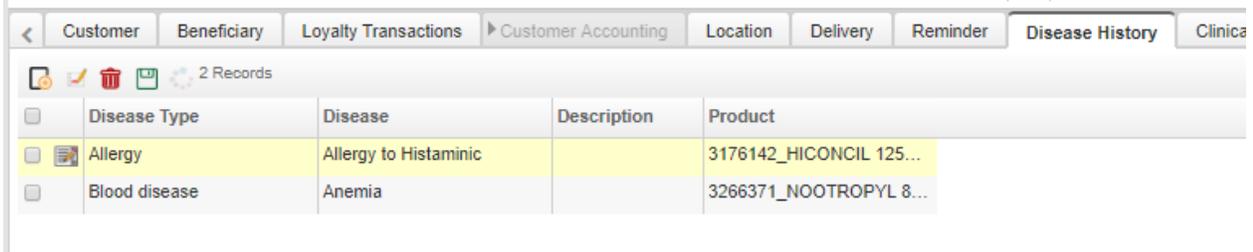
Shows the products that have an active refill reminder



Organization	Product	Intern Quantity	Reminder Date	Dose per Day	Active	Date Next Refill	Quantity	Purchased Date
posPharmacy	3130536_BACTRIM 200M...	1	01/10/2019		<input checked="" type="checkbox"/>	01/11/2019	1	01/10/2019
posPharmacy	8019571_FAMODINE 40...	1	01/09/2019		<input checked="" type="checkbox"/>	01/11/2019	1	01/10/2019
posPharmacy	3016450_CA C 1000MG ...	20	01/18/2019	2	<input checked="" type="checkbox"/>	01/20/2019	1	01/10/2019
posPharmacy	2006811_PALUJECT 0.40...	12	01/21/2019		<input checked="" type="checkbox"/>	01/22/2019	1	01/10/2019

Disease History TAB

Shows the customers medical information:



The screenshot shows a software interface with a navigation bar at the top containing tabs: Customer, Beneficiary, Loyalty Transactions, Customer Accounting, Location, Delivery, Reminder, Disease History, and Clinical. The 'Disease History' tab is active. Below the navigation bar, there are icons for search, edit, delete, and refresh, followed by the text '2 Records'. A table with the following columns is displayed: Disease Type, Disease, Description, and Product. The first two rows are highlighted in yellow.

	Disease Type	Disease	Description	Product
<input type="checkbox"/>	Allergy	Allergy to Histaminic		3176142_HICONCIL 125...
<input type="checkbox"/>	Blood disease	Anemia		3266371_NOOTROPYL 8...

1.1.4. Customer Accounting Configuration

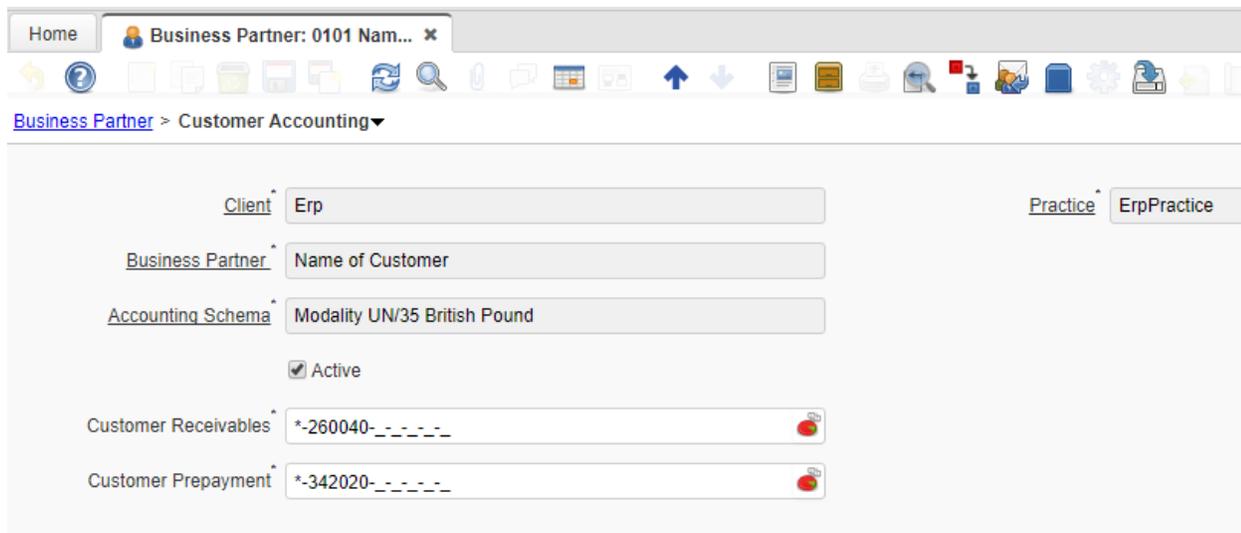
It is important to configure the accounting accounts that the system must use in the sales transactions made by this customer.

By default when creating a new customer, the system brings the accounts configured in the group of business partners to which the registration is assigned, but the user can modify them directly in the TAB Customer Accounting.

Customer Accounting

Define Customer Accounting

The Customer Accounting Tab defines the default accounts to use when this business partner is referenced on an accounts receivable transaction.



Home Business Partner: 0101 Nam... x

Business Partner > Customer Accounting

Client: Practice:

Business Partner:

Accounting Schema:

Active

Customer Receivables: 

Customer Prepayment: 

To change the assigned accounting account, it is done with the icon:



1.2. Vendor or Supplier

1.2.1. Introduction

A vendor (supplier) can be a person or a company that supplies other companies with stocks (items) or services necessary for the development of the activity.

The Vendors (Suppliers) correspond to the business partner with whom the company makes Purchase transactions and of which we need to know special information such as account statements, discounts granted to us, price list among others.

Depending on the type of items or service provided by our vendor (supplier), we can differentiate them into 3 types:

- Vendor(Supplier) of goods: this would be in charge of providing the company with articles and tangible objects.
- Service Vendor: this type of supplier does not provide material but provides a service or activity so that their clients can in turn perform their functions in the company. For example, as suppliers of generic services that every company needs would be telephone companies, water and electricity.
- Vendor(Supplier) of resources: these would be in charge of covering the economic needs of the company, for example, banks or financial entities.

In Idempiere/SmartERP, the qualification of the vendor is that granted to a business partner registry created, for which we will see that the windows and the concepts will always refer to Business Partner.

The above means that a Business Partner can be marked as a vendor (supplier) and in turn as an employee and as a customer.

1.2.2. Business Partner Group

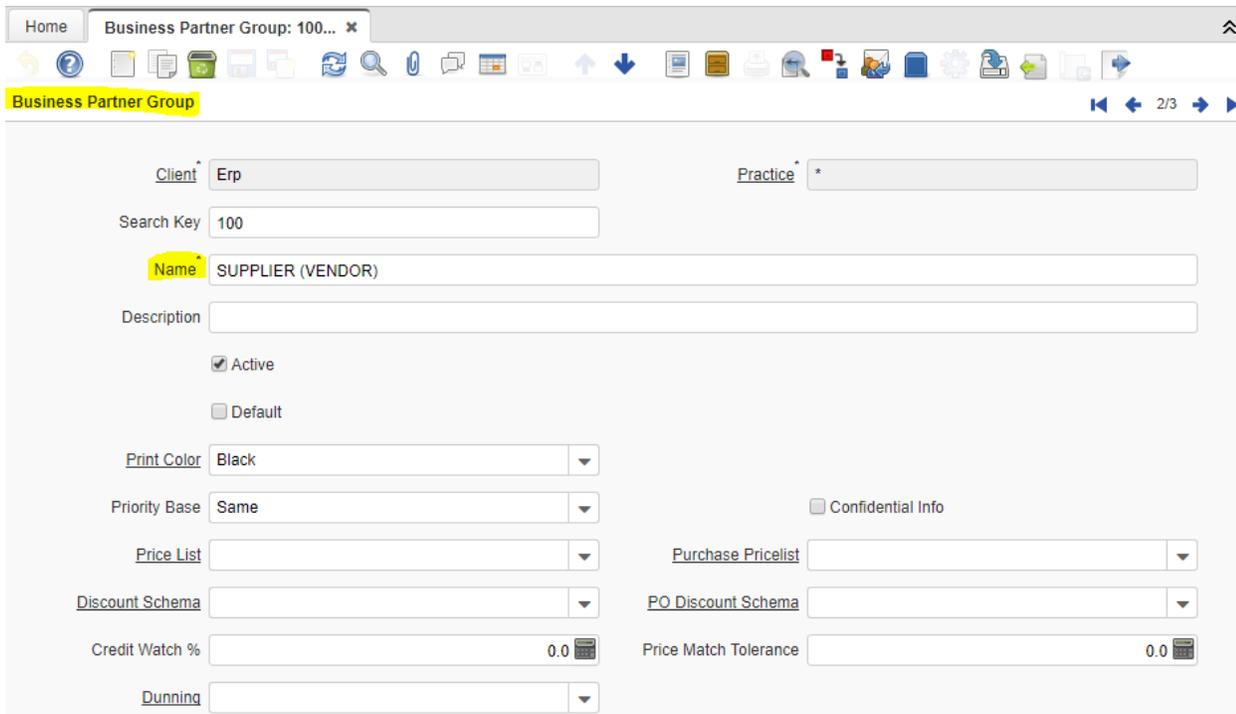
The Vendor(Suppliers) are created in the first instance as business partners and selecting the Vendor field. A business partner group must be assigned to the registry.

Menu – Advanced ERP - Partner Relations – Business Partner Rules - Business Partner Group

In Idempiere/SmartERP it is possible to group the business partner by similar characteristics through this group option of third parties, either to generate reports or carry out massive processes such as changes in accounting accounts, price lists and discounts.

We can create N groups of business partners in Idempiere/SmartERP for example: PARTNERS, VIP CLIENTS, INTERNAL CLIENTS, STAR SUPPLIERS ..

As an example, we created the Supplier (Vendor) registry:



Business Partner Group

Client: Erp Practice: *

Search Key: 100

Name: SUPPLIER (VENDOR)

Description:

Active Default

Print Color: Black

Priority Base: Same Confidential Info

Price List: Purchase Pricelist:

Discount Schema: PO Discount Schema:

Credit Watch %: 0.0 Price Match Tolerance: 0.0

Dunning:

1.2.3. Configuration

Mark the Vendor checkbox, you will see that new Tabs appear on the screen related to the vendor functionality.

Essential Fields for Vendor: Tax ID, Surname.

Business Partner 556/958

Tax ID: 0100717 M Check Digit: 0

Name: LABOREX - CI

Names:

Surname: LABOREX - CI

Customer
 Is Insurance Company
 Vendor
 Active

Client: posPharmacy Organization: posPharmacy

None of these fields are mandatory but have an impact on the purchasing processes that are executed in Idempiere/SmartERP.

Payment Rule: The Payment Rule indicates the method of purchase payment.

PO Payment Term: The PO Payment Term indicates the payment term that will be used when this purchase order becomes an invoice.

Purchase Price List: Identifies the price list used by a Vendor for products purchased by this organization.

PO Discount Schema: *Schema to calculate the purchase trade discount percentage*

Is Manufacturer: *Indicate role of this Business partner as Manufacturer*

We proceed to save the record with the icon



Location TAB

Client	Organization	Business Partner	Name	Active	Address	Phone	ISDN	Invoice Address
posPharmacy	posPharmacy	LABOREX - CI	LABOREX - CI	<input checked="" type="checkbox"/>	BP 1104, Abidj...	23537333		<input checked="" type="checkbox"/>

Vendor TAB

[Business Partner](#) > Vendor ▼

Record saved

Client: posPharmacy Organization: posPharmacy

Search Key: 1000000

Name: Pharmacy Wholesale partner #1

Vendor Sales Representative

Payment Rule: [Dropdown] PO Payment Term: [Text]

Purchase Pricelist: [Dropdown] PO Discount Schema: [Text]

Is Manufacturer

Vendor Accounting

1 Records

Client	Organization	Business Partner	Accounting Schema	Active	Vendor Liability	Vendor Service Liability	Vendor Prepayment
posPharmacy	*	Pharmacy Wholesale part...	yelemPharmacy UN/35 C...	<input checked="" type="checkbox"/>	*-V_LIABILITY-_-	*-V_LIABILITY_SERVICES-_-	*-V_PREPAYMENT-_-

1.2.4. Vendor accounting configuration

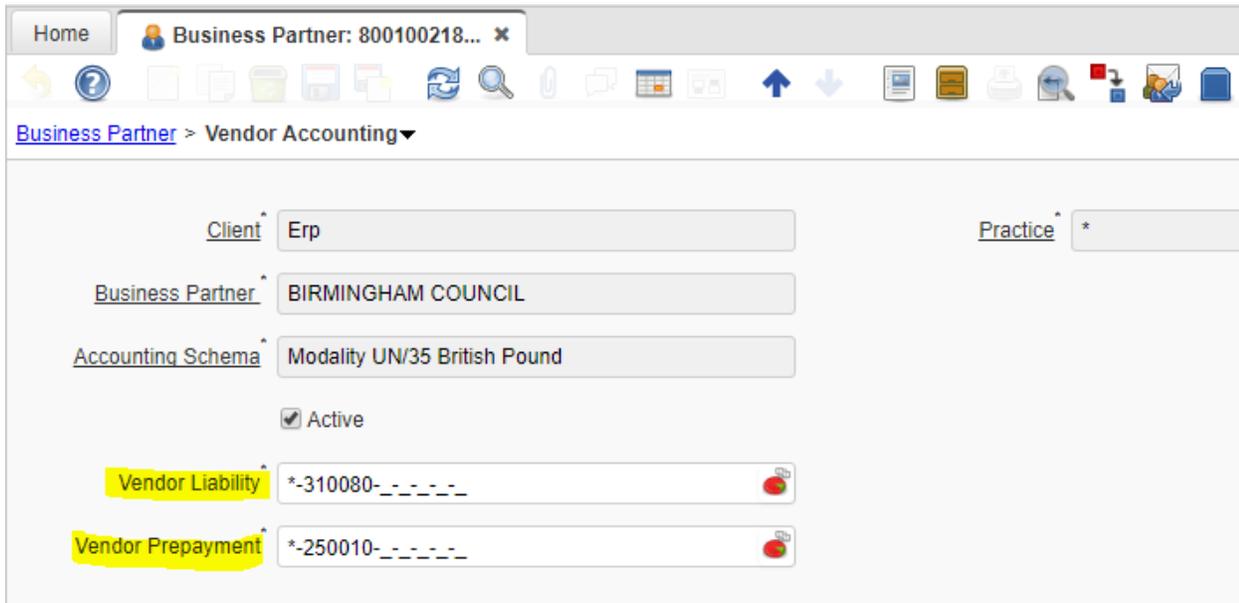
It is important to configure the accounting accounts that the system must use in the purchase transactions made by this vendor(supplier).

By default when creating a new provider, the system brings the accounts configured in the group of business partners to which the registration is assigned, but the user can modify them directly in the TAB Vendor Accounting.

Vendor Accounting

Define Vendor Accounting

The Vendor Accounting Tab defines the default accounts to use when this business partner is referenced in an accounts payable transaction.



Home | Business Partner: 800100218... x

Business Partner > Vendor Accounting

Client: Erp | Practice: *

Business Partner: BIRMINGHAM COUNCIL

Accounting Schema: Modality UN/35 British Pound

Active

Vendor Liability: *-310080-____

Vendor Prepayment: *-250010-____

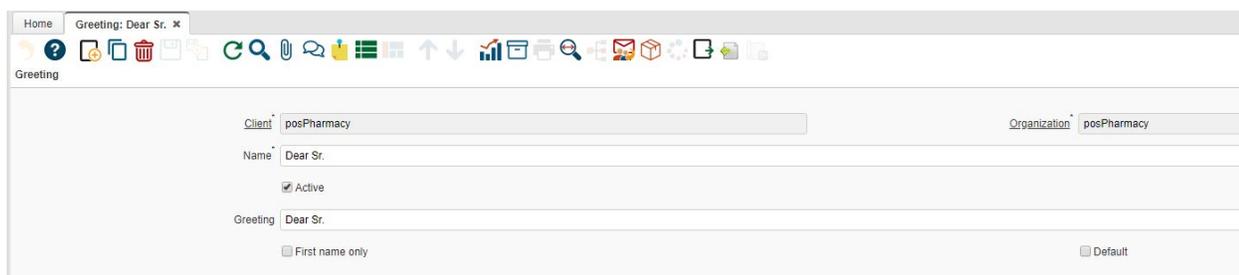
To change the assigned accounting account, it is done with the icon:



2. Additional Configuration

2.1. Greeting

- **Partner Relations-Business Partner Rules - Greeting:** Dear Sr.



Home | Greeting: Dear Sr. x

Greeting

Client: posPharmacy | Organization: posPharmacy

Name: Dear Sr.

Active

Greeting: Dear Sr.

First name only | Default

(Optional) 2.2. Insurance Company (an special case for pharmacies and clinics (Smartretail/SmarClinic Only)

Mark the Insurance Company checkbox , you will see that new Tabs appear on the screen related to the customer functionality.

Essential Fields for Insurance Company: TAX ID, Surname, Insurance Company Type.

Business Partner « K

Tax ID	FONCTIONNAIRES	Check Digit	0
Name	MUGEF-CI		
Names			
Surname	MUGEF-CI		
<input type="checkbox"/> Customer		<input checked="" type="checkbox"/> Is Insurance Company	
		<input type="checkbox"/> Vendor	
		<input checked="" type="checkbox"/> Active	
		Insurance Company Type	Courverture Medicale
Client	posPharmacy		
	Organization	posPharmacy	

Insurance Plans TAB

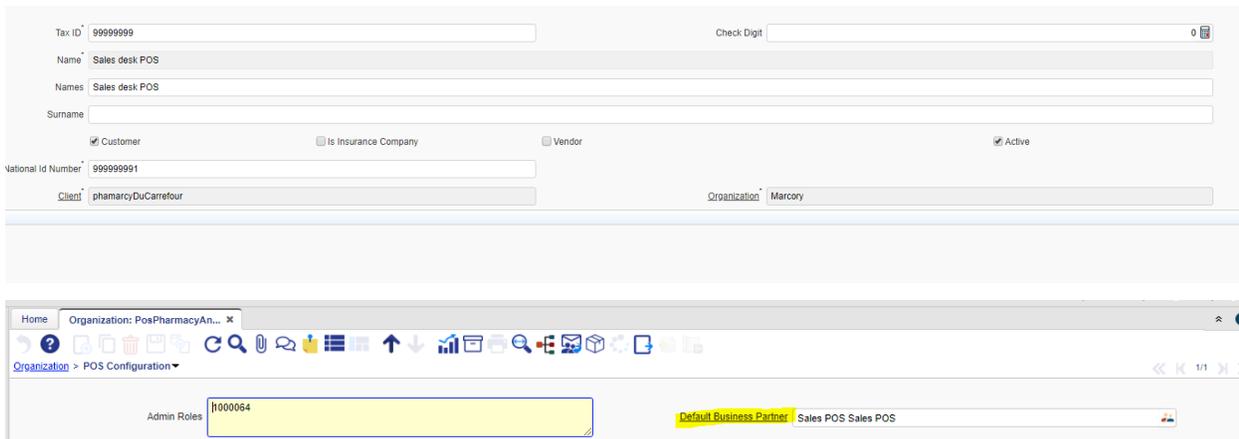
Insurance Plans	Beneficiary	Location	Bank Account	Contact (User)	BP Access	Interest Area
1 Records						
Client	Organization	Active	Insurance Company	Name	Co-Pay Percentage	Co-Pay Value
<input type="checkbox"/> posPharmacy	posPharmacy	<input checked="" type="checkbox"/>	MUGEF-CI	Basic	30.0	0

Location TAB

Beneficiary	Location	Delivery	Prescriptions	Vendor	Vendor Accounting	Bank Account	Contact (User)	BP Access	Interest Area
1 Records									
Client	Organization	Business Partner	Name	Active	Address	Phone	ISDN	Invoice Address	
<input type="checkbox"/> posPharmacy	posPharmacy	LABOREX - CI	LABOREX - CI	<input checked="" type="checkbox"/>	BP 1104, Abidj...	23537333		<input checked="" type="checkbox"/>	

2.3. (optional for POS) Default Customer (For Counter Sales) (an special case for pharmacies and clinics (Smartretail/SmarClinic Only)

You must create a business partner client that will be used to record the POS transactions, when a customer is not provided (default) in this case it is Sales desk POS.



The screenshot displays the configuration page for a business partner client. The form includes the following fields and options:

- Tax ID: 99999999
- Check Digit: 0
- Name: Sales desk POS
- Names: Sales desk POS
- Surname: (empty)
- Radio buttons: Customer, Is Insurance Company, Vendor, Active
- National Id Number: 999999991
- Client: pharmacyDuCarrefour
- Organization: Marcory

Below the form, the browser's address bar shows "Organization > POS Configuration". The "Admin Roles" field is set to "f000064", and the "Default Business Partner" dropdown is set to "Sales POS Sales POS".

Index: <http://www.smartjsp.com/web/en/idempiereFirstSteps>