

Table of Content

1. Procurement Process	2
1.1. Workflows	3
1.2. Define Product	4
2. Simplified Purchasing process	5
2.1. Purchase Order	5
2.2. Material Receipt	6
2.3. Invoice (Vendor)	7
2.4. Invoice payment to supplier	8
2.5. Indirect payment from the allocation option	10
3. Complete Purchasing Process	11
3.1. Requisition	11
3.2. Purchase Order	12
3.3. Set up confirmation document	13
3.4. Material Receipt	14
3.5. Invoice (Vendor)	20
3.6. Invoice payment to supplier	21

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Authorized by Pedro Rozo

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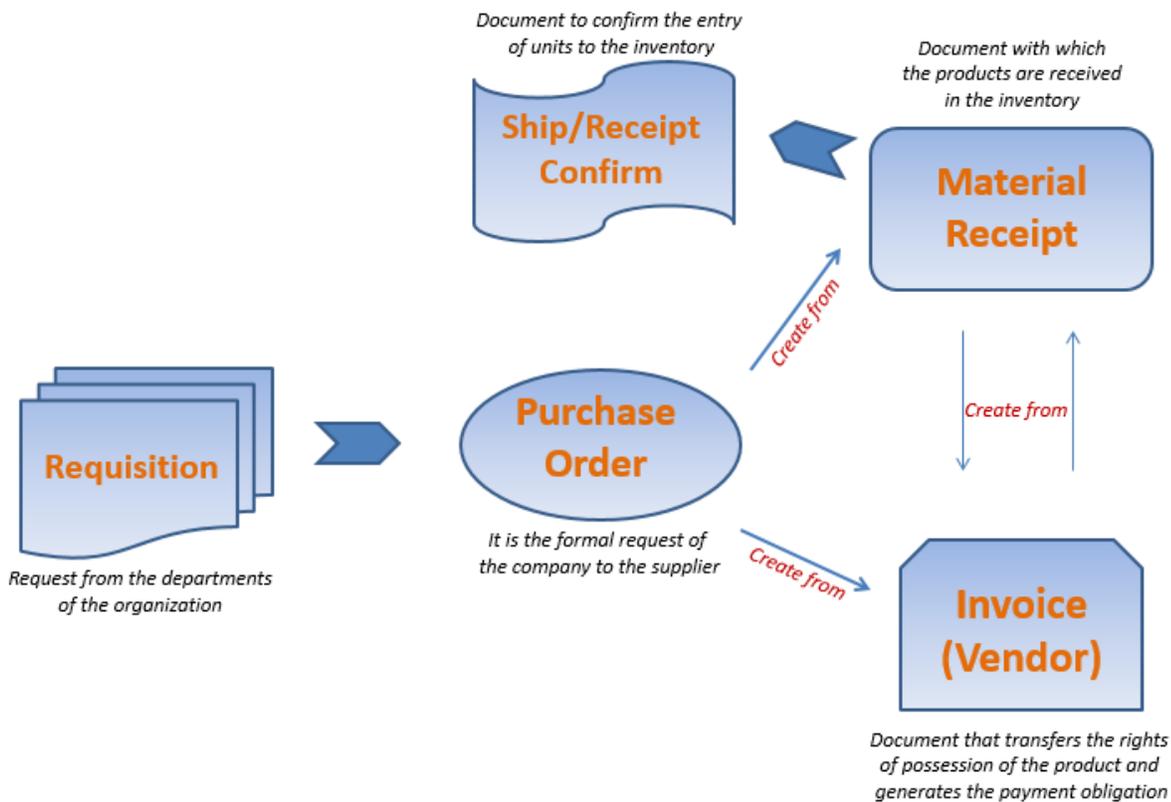
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Made in Colombia

1. Procurement Process

Idempiere/SmartERP covers the purchasing process by generating the documents, from the requests of the different departments of the organization to receiving products and registering the invoice generated by the supplier.



The documents that can intervene the purchasing process are:

- Requisition (Optional)
- Purchase Order
- Ship/Receipt Confirmation (Optional)
- Material Receipt
- Invoice (Vendor)

Requisition: Document by which the areas of the company or the employees request the purchase of materials or products to the department in charge of the process of purchases from suppliers.

Purchase Order: This document is used to generate the official request for goods to the supplier, this is informative and administrative

Confirmation: Document which confirms the units that are being received

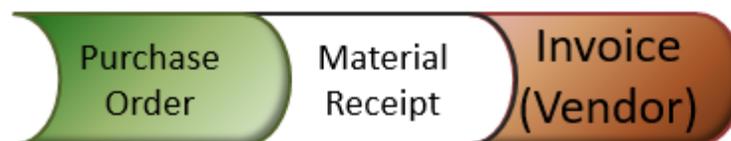
Material Receipt: Document that records the goods receipt to the inventory, can be generated from the purchase order or from the invoice(vendor).

Invoice (Vendor): Records the obligation to pay the supplier for goods received. This document is the transfer of ownership rights from the supplier to the company.

Based on the previous documents the company can choose the following workflows to use in the purchasing process:

1.1. Workflows

From the most complete/complex to the most simple/agile.



Next we will carry out a general purchasing process (simplified, third type of workflow) and a complete purchase process (first workflow shown above)

1.2. Define Product

Menu - Material Management – Material Management Rules - Product
 Product: 99 product Test 1

Home (22) Product: 99 Product Test 1 x

Product 21/22

Record saved

Client: Health Demo	Organization: Health Demo
Search Key: 99	Version No:
Name: Product Test 1	
Description: Product Test 1	
Comment/Help: Product Test 1	
Document Note: Product Test 1	
UPC/EAN: 101202121212121	SKU: 858558
<input checked="" type="checkbox"/> Active	<input type="checkbox"/> Summary Level
Product Category: Standard	Classification:
Tax Category: Sales Tax	
UOM: Each	Company Agent: healthAdmin
Product Type: Item	Mail Template:
Weight: 0.00	Volume: 0.00
<input type="checkbox"/> Own Box	

Product > Price

Record saved

<input type="checkbox"/>	Organization	Product	Price List Version	Active	List Price	Standard Price	Limit Price
<input type="checkbox"/>	Health Demo	99_Product Test 1	Purchase Price	<input checked="" type="checkbox"/>	10.00	10.00	10.00
<input type="checkbox"/>	Health Demo	99_Product Test 1	Sale Price	<input checked="" type="checkbox"/>	18.00	18.00	18.00

2. Simplified Purchasing process

The following is a simplified purchasing process (third type of [workflow](#)):

2.1. Purchase Order

Menu – Requisition-to-Invoice - Purchase Order

Purchase Order 1/1

Data requested 1 Line(s) - 50.00 - Total: 54.00 US

Document No: 800001 Order Reference:

Description:

Target Document Type: Purchase Order

Date Ordered: 05/23/2017 Date Promised: 05/23/2017

Business Partner: Commer Laretta Invoice Partner: 1000005-Commer Laretta

Partner Location: Commer Laretta Invoice Location: Commer Laretta

User/Contact: Commer Laretta Invoice Contact: Commer Laretta

Delivery

Delivery

Invoicing

Status

Document Status: Completed Document Type: Purchase Order

PO Line Matching Requisition Lines Order Tax Payment Schedule Estimated Landed Cost Estimated Landed Cost Allocation

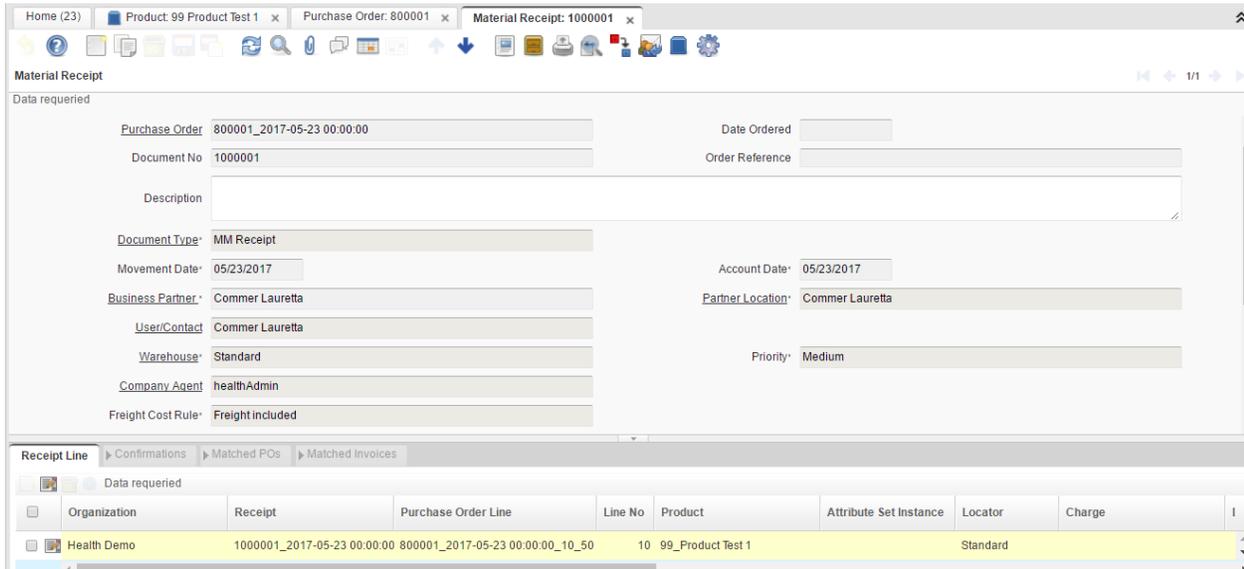
Data requested

Organization	Purchase Order	Business Partner	Partner Location	Date Promised	Date Ordered	Line No	Warehouse	Product
Health Demo	800001_2017-05-23 00:00:00	Commer Laretta	Commer Laretta	05/23/2017	05/23/2017	10		99_Product Test 1

Document is completed.

2.2. Material Receipt

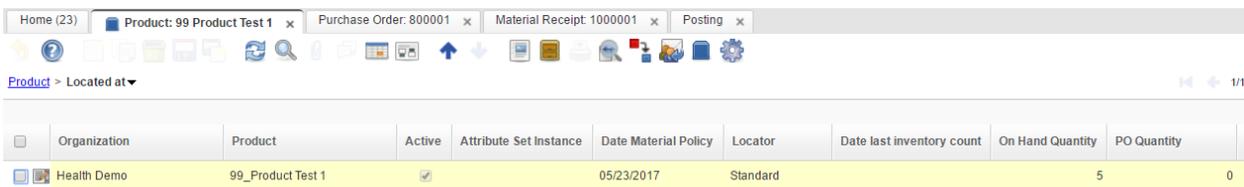
Menu - Requisition-to-Invoice - Material Receipt



Organization	Receipt	Purchase Order Line	Line No	Product	Attribute Set Instance	Locator	Charge
Health Demo	1000001_2017-05-23 00:00:00	800001_2017-05-23 00:00:00_10_50	10	99_Product Test 1		Standard	

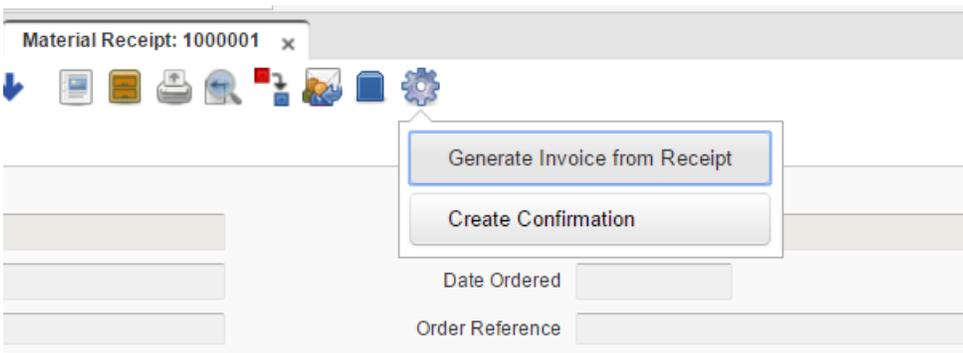
Document is completed.

The previous process affected the inventory in quantities.



Organization	Product	Active	Attribute Set Instance	Date Material Policy	Locator	Date last inventory count	On Hand Quantity	PO Quantity
Health Demo	99_Product Test 1	<input checked="" type="checkbox"/>		05/23/2017	Standard		5	0

From this Material Receipt document we proceed to generate the invoice (vendor).



Material Receipt: 1000001

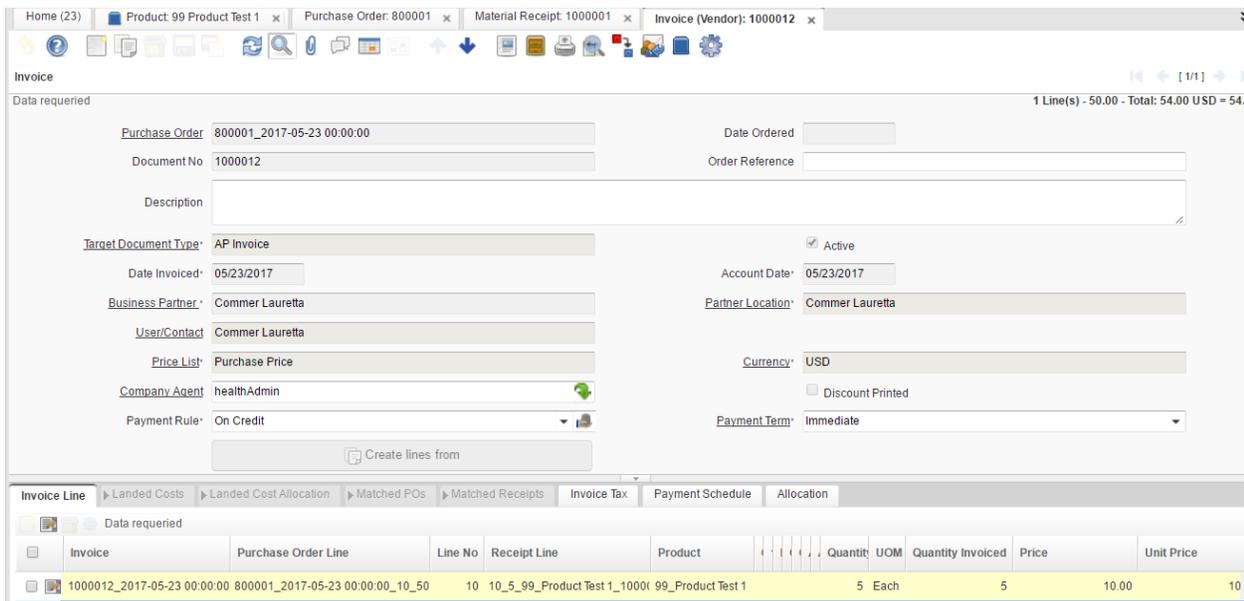
Generate Invoice from Receipt

Create Confirmation

Date Ordered

Order Reference

2.3. Invoice (Vendor)



Invoice

Data requested: 1 Line(s) - 50.00 - Total: 54.00 USD = 54.

Purchase Order: 800001_2017-05-23 00:00:00 | Date Ordered: |
 Document No: 1000012 | Order Reference: |
 Description: |

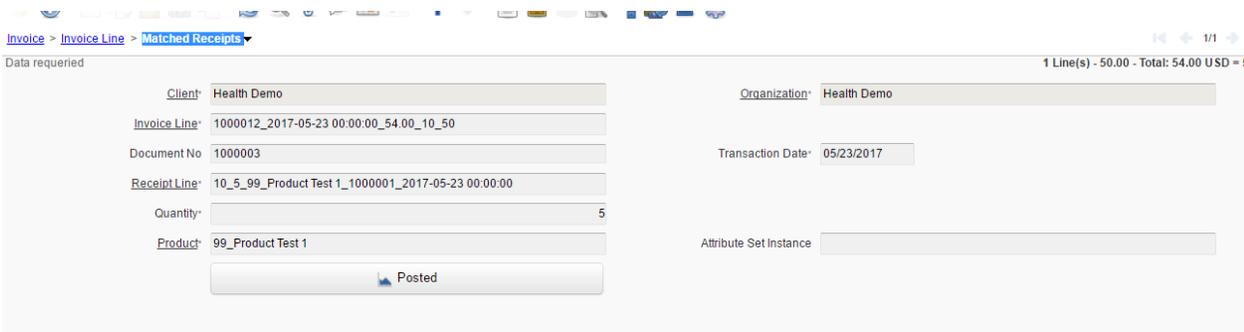
Target Document Type: AP Invoice | Active
 Date Invoiced: 05/23/2017 | Account Date: 05/23/2017
 Business Partner: Commer Laretta | Partner Location: Commer Laretta
 User/Contact: Commer Laretta |
 Price List: Purchase Price | Currency: USD
 Company Agent: healthAdmin | Discount Printed
 Payment Rule: On Credit | Payment Term: Immediate

Invoice	Purchase Order Line	Line No	Receipt Line	Product	Quantity	UOM	Quantity Invoiced	Price	Unit Price
1000012_2017-05-23 00:00:00	800001_2017-05-23 00:00:00_10_50	10	10_5_99_Product Test 1_100001	99_Product Test 1	5	Each	5	10.00	10

Document is completed.

This document is the one that affects accounts payable

Linking the document invoice (vendor) with the receipt material creates internally an assignment which can be consulted from the lines of the invoice in the Matched Receipts TAB.



[Invoice](#) > [Invoice Line](#) > [Matched Receipts](#)

Data requested: 1 Line(s) - 50.00 - Total: 54.00 USD = 54.

Client: Health Demo | Organization: Health Demo
 Invoice Line: 1000012_2017-05-23 00:00:00_54.00_10_50 |
 Document No: 1000003 | Transaction Date: 05/23/2017
 Receipt Line: 10_5_99_Product Test 1_1000001_2017-05-23 00:00:00 |
 Quantity: 5 |
 Product: 99_Product Test 1 | Attribute Set Instance: |

2.4. Invoice payment to supplier

Direct payment in the document

Payable:

Menu - Open Items – Payment

Home (23) | Payment: 1000001 | Invoice (Vendor): 1000012

Payment

Allocation: 1000001

Document No: 1000001 | Bank Account: 123-456-789_Cuenta Bancaria-Helm Bank_1

Document Type: AP Payment | Receipt:

Transaction Date: 05/23/2017 | Account Date: 05/23/2017

Description: Invoice (Vendor): 1000012

Reference

Business Partner: Commer Lairetta | Invoice: 1000012_2017-05-23 00:00:00_54.00

Order: | Prepayment:

Charge: |

Amounts

Payment amount: 54.00 | Currency: USD

Discount Amount: 0.00 | Write-off Amount: 0.00

Over/Under Payment | Over/Under Payment: 0.00

Document

Status

Payment Processor: | Document Status: Completed | Document Action

Enter Query | View Result

Organization	Account	Accounted Debit	Accounted Credit	Product	Business Partner	Account Date	Period	PostingType
Health Demo	21300_Payment selection	54.00	0.00		Commer Lairetta	05/23/2017	May-17	Actual
Health Demo	11110_Checking In-Transfer	0.00	54.00		Commer Lairetta	05/23/2017	May-17	Actual
		54.00	54.00					

This process creates a document called assignment.

Home (23) | Payment: 1000001 x | View Allocation: 1000001 x

Allocation

Data requested

Client: Health Demo | Organization: Health Demo

Document No: 1000001 | Active

Description: Payment: 1000001 [1]

Transaction Date: 05/23/2017 | Account Date: 05/23/2017

Approved | Manual

Currency: USD | Approval Amount: 0.00

Document Status: Completed

Processed

[Document Action](#)

[Posted](#)

Allocation Line

Data requested

Organization	Allocation	Business Partner	Order	Invoice	Payment	Charge	Am
Health Demo	1000001	Commer Lauretta	800001_2017-05-23 00:00:00	1000012_2017-05-23 00:00:00	1000001_2017-05-23 00:00:00		

Enter Query | **View Result**

Organization	Account	Accounted Debit	Accounted Credit	Product	Business Partner	Account Date	Period	PostingType
Health Demo	21100_Accounts Payable Trade	54.00	0.00		Commer Lauretta	05/23/2017	May-17	Actual
Health Demo	21300_Payment selection	0.00	54.00		Commer Lauretta	05/23/2017	May-17	Actual
		54.00	54.00					

Home (23) | Payment: 1000000 x | View Allocation: 1000000 x | **Posting** x

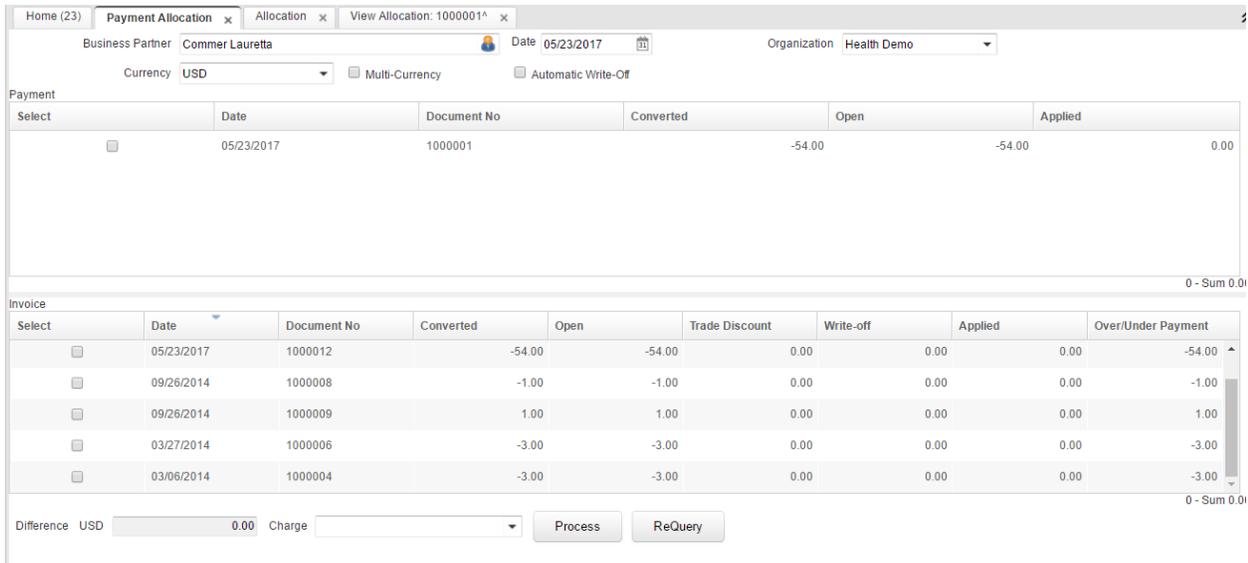
Enter Query | **View Result**

Organization	Account	Accounted Debit	Accounted Credit	Product	Business Partner	Account Date	Period
Health Demo	11130_Checking Unallocated Receipts	38.88	0.00		Standard	05/23/2017	May-17
Health Demo	12110_Accounts Receivable - Trade	0.00	38.88		Standard	05/23/2017	May-17
		38.88	38.88				

2.5. Indirect payment from the allocation option

If a payment has been generated without indicating a corresponding invoice, it can subsequently be assigned from the Payment Allocation window.

Menu - Open Items – Payment Allocation



Business Partner: Commer Laurretta | Date: 05/23/2017 | Organization: Health Demo

Currency: USD | Multi-Currency: | Automatic Write-Off:

Payment						
Select	Date	Document No	Converted	Open	Applied	
<input type="checkbox"/>	05/23/2017	1000001		-54.00	-54.00	0.00
						0 - Sum 0.00

Invoice									
Select	Date	Document No	Converted	Open	Trade Discount	Write-off	Applied	Over/Under Payment	
<input type="checkbox"/>	05/23/2017	1000012		-54.00	-54.00	0.00	0.00	0.00	-54.00
<input type="checkbox"/>	09/26/2014	1000008		-1.00	-1.00	0.00	0.00	0.00	-1.00
<input type="checkbox"/>	09/26/2014	1000009		1.00	1.00	0.00	0.00	0.00	1.00
<input type="checkbox"/>	03/27/2014	1000006		-3.00	-3.00	0.00	0.00	0.00	-3.00
<input type="checkbox"/>	03/06/2014	1000004		-3.00	-3.00	0.00	0.00	0.00	-3.00
									0 - Sum 0.00

Difference USD: 0.00 | Charge: | |

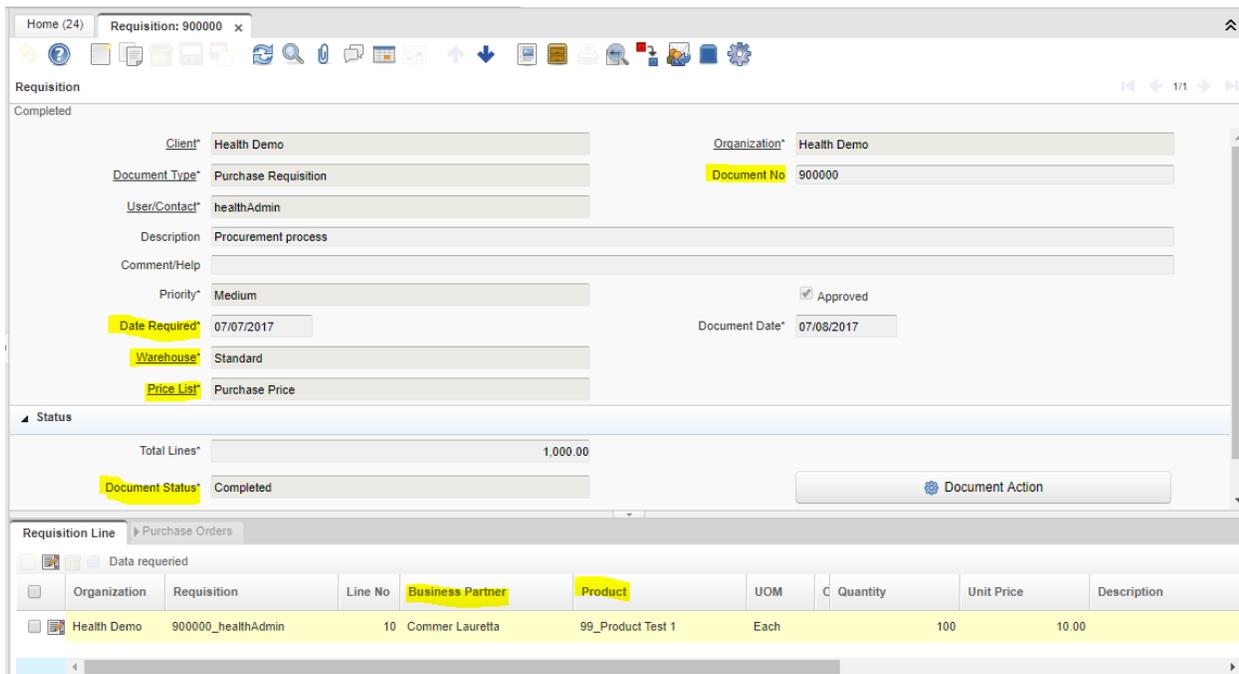
We select the invoice (vendor) and the payment that will be referenced, this process generates a document called allocation.

3. Complete Purchasing Process

The following is a complete purchasing process (first type of [workflow](#)):

3.1. Requisition

Menu - Requisition-to-Invoice - Requisition



Home (24) Requisition: 900000 x

Requisition
Completed

Client* Health Demo Organization* Health Demo
 Document Type* Purchase Requestion Document No 900000
 User/Contact* healthAdmin
 Description Procurement process
 Comment/Help
 Priority* Medium Approved
 Date Required* 07/07/2017 Document Date* 07/08/2017
 Warehouse* Standard
 Price List* Purchase Price

Status
 Total Lines* 1,000.00
 Document Status* Completed Document Action

Requisition Line Purchase Orders
 Data requested

Organization	Requisition	Line No	Business Partner	Product	UOM	Quantity	Unit Price	Description
Health Demo	900000_healthAdmin	10	Commer Laurretta	99_Product Test 1	Each	100	10.00	

3.2. Purchase Order

Menu - Requisition-to-Invoice - Create PO from Requisition

Home (23) *Purchase Order x Create PO from Requisition x

Create Purchase Orders from Requisitions

Create Purchase orders from Purchase Requisitions.

Requisition 900000_healthAdmin
Organization Health Demo
Warehouse Standard

Document Date -
Date Required -
Priority
User/Contact
Product
Product Category
Business Partner Group

Consolidate to one Document

Home (24) *Purchase Order x Create PO from Requisition x

Create Purchase Orders from Requisitions

Create Purchase orders from Purchase Requisitions.

1080.00 [Generated PO: 800002](#)

This process generated the purchase order in draft state

Menu - Requisition-to-Invoice - Purchase Order

Home (24) Create PO from Requisition x Purchase Order: 800002 x

Purchase Order

Data requested 1 Line(s) - 1,000.00 - Total: 1,080.00 USD = 1,080.00

Client: Health Demo Organization: Health Demo

Document No: 800002 Order Reference:

Description:

Target Document Type: Purchase Order

Date Ordered: 07/09/2017 Date Promised: 07/07/2017

Business Partner: Commer Laurretta Invoice Partner: 1000005-Commer Laurretta

Partner Location: Commer Laurretta Invoice Location: Commer Laurretta

User/Contact: Commer Laurretta Invoice Contact: Commer Laurretta

Delivery

Delivery

Invoicing

Status

Document Status: Drafted Document Type: ** New **

PO Line Matching Requisition Lines Order Tax Payment Schedule Estimated Landed Cost Estimated Landed Cost Allocation

Organization	Purchase Order	Business Partner	Partner Location	Date Promised	Date Ordered	Line No	Warehouse	Product
Health Demo	800002_2017-07-09 00:00:00	Commer Laurretta	Commer Laurretta	07/07/2017	07/09/2017	10		99_Produ

It is modified and completed.

Status

Document Status: Completed Document Type: Purchase Order

Total Lines: 1,000.00 Grand Total: 1,080.00

Pay Schedule valid

Cash Plan Line

Document Action

Not Posted

Home (23) Create PO from Requisition x Purchase Order: 800002 x

Purchase Order - PO Line

1 Line(s) - 1,000.00 - Total: 1,080.00 USD = 1,080.00

Client: Health Demo Organization: Health Demo

Purchase Order: 800002_2017-07-09 00:00:00

Business Partner: Commer Laurretta Partner Location: Commer Laurretta

Date Promised: 07/07/2017 Date Ordered: 07/09/2017

Line No: 10

Product: 99_Product Test 1 Charge:

Attribute Set Instance

Description:

Quantities

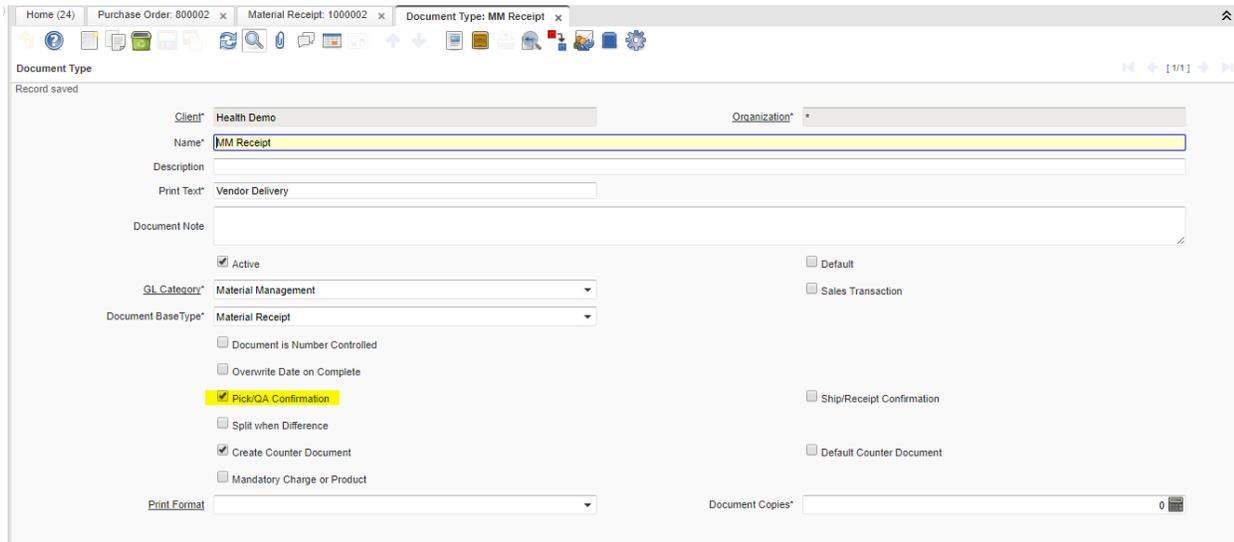
Quantity: 100 UOM: Each

Matching Requisition Lines

Organization	Requisition	Line No	Description	Product	UOM	Quantity	Unit Price	Line Amount
Health Demo	900000_healthAdmin	10		99_Product Test 1	Each	100	10.00	1,000.00

3.3. Set up confirmation document

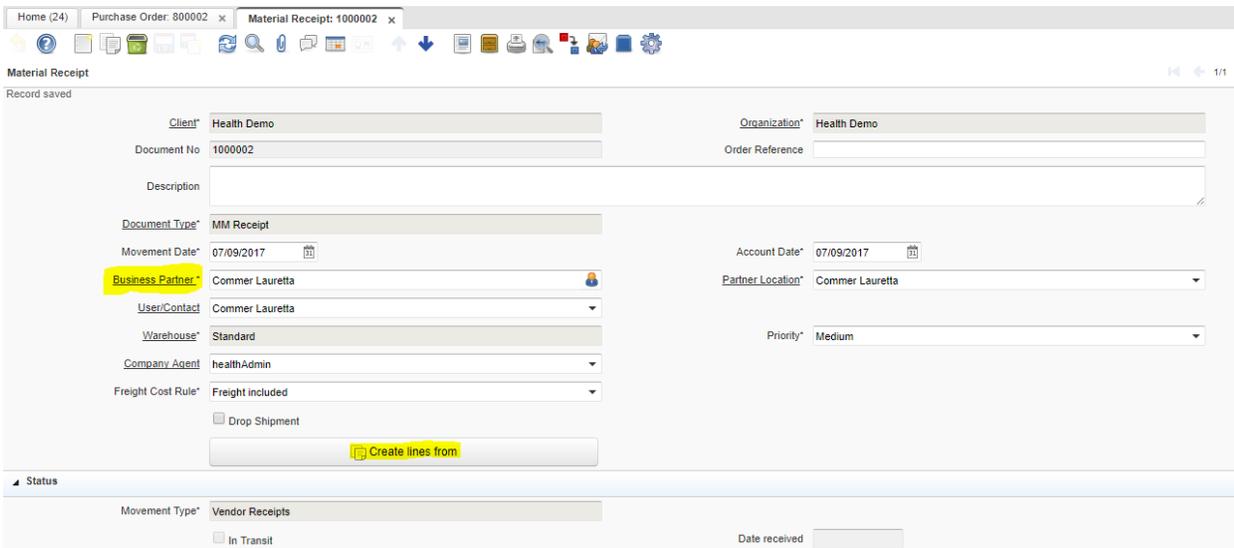
Menu – Performance Analysis – Accounting Rules – Document Type



Document Type configuration for MM Receipt. The form includes fields for Client (Health Demo), Organization, Name (MM Receipt), Description, Print Text (Vendor Delivery), and Document Note. It also features a list of checkboxes for various options: Active, Default, Sales Transaction, Document is Number Controlled, Overwrite Date on Complete, Pick/QA Confirmation (highlighted), Ship/Receipt Confirmation, Split when Difference, Create Counter Document, and Default Counter Document. Other fields include GL Category (Material Management), Document BaseType (Material Receipt), and Document Copies (0).

3.4. Material Receipt

Menu - Requisition-to-Invoice - Material Receipt



Material Receipt form showing details for Document No 1000002. The form includes fields for Client (Health Demo), Organization (Health Demo), Document No (1000002), Order Reference, Description, Document Type (MM Receipt), Movement Date (07/09/2017), Account Date (07/09/2017), Business Partner (Commer Laretta), Partner Location (Commer Laretta), User/Contact (Commer Laretta), Warehouse (Standard), Priority (Medium), Company Agent (healthAdmin), and Freight Cost Rule (Freight included). A 'Drop Shipment' checkbox is present. A 'Create lines from' button is highlighted. The Status section shows Movement Type (Vendor Receipts) and In Transit checkbox.

With the icon *Create from* we bring the information from the Purchase Order.

Receipt .. Create lines from

Business Partner: **Commer Laretta**  **Purchase Order** 800002 - 2017-07-09 00:00

Locator: **Standard**  Invoice:

Only from same warehouse

UPC/EAN:

Select	Quantity	UOM	Locator	Product	Partner Product	Purchase Order	RMA	Invoice
<input checked="" type="checkbox"/>	100.00 	Ea	Standard	Product Test 1		10		

Document Type: MM Receipt

Movement Date: 07/09/2017  Account Date: 07/09/2017 

Business Partner: Commer Laretta

User/Contact: Commer Laretta

Warehouse: Standard

Company Agent: healthAdmin

Freight Cost Rule: Freight included

Drop Shipment

Create lines from

Document Action

Document Action: **Complete**

Generate documents and complete transaction

Movement Type: Vendor Receipts

In Transit

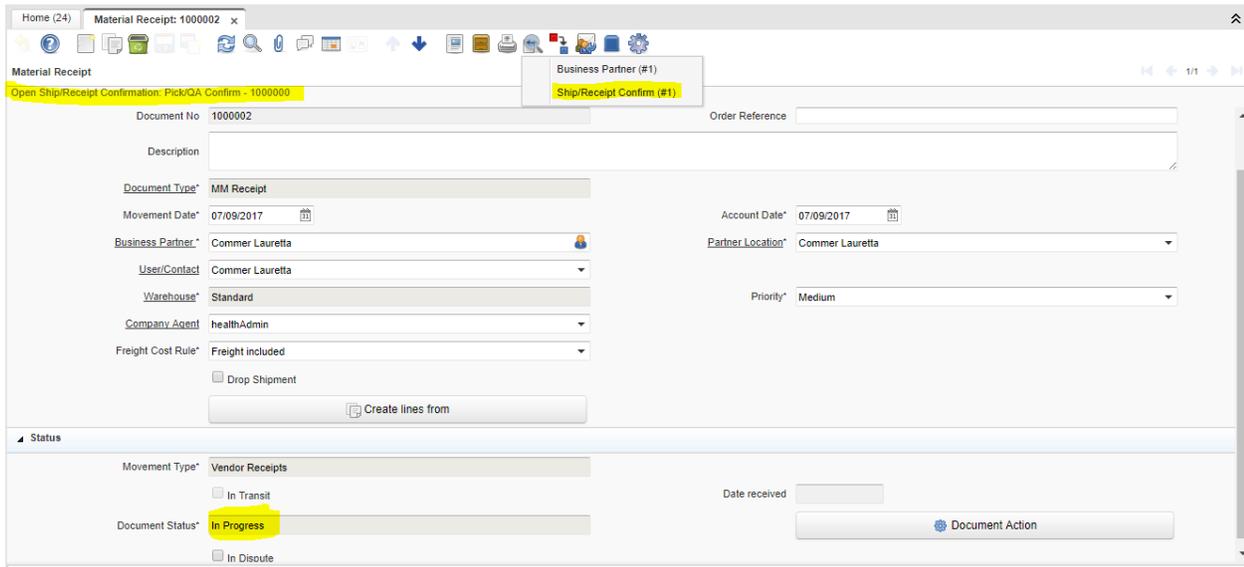
Date received:

Document Status: **Drafted**

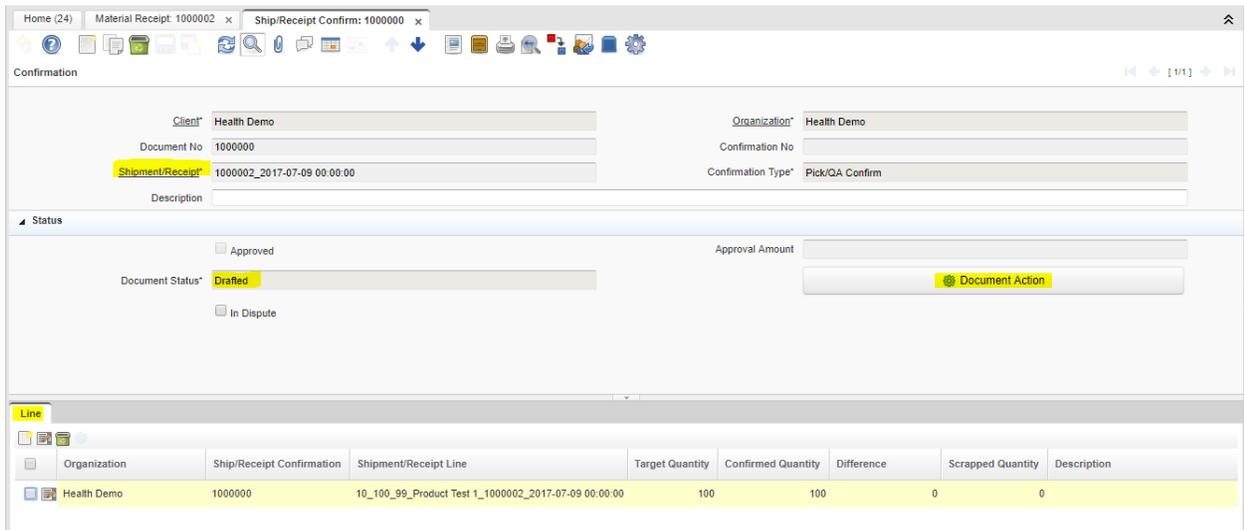
In Dispute

 Document Action

Document is completed.



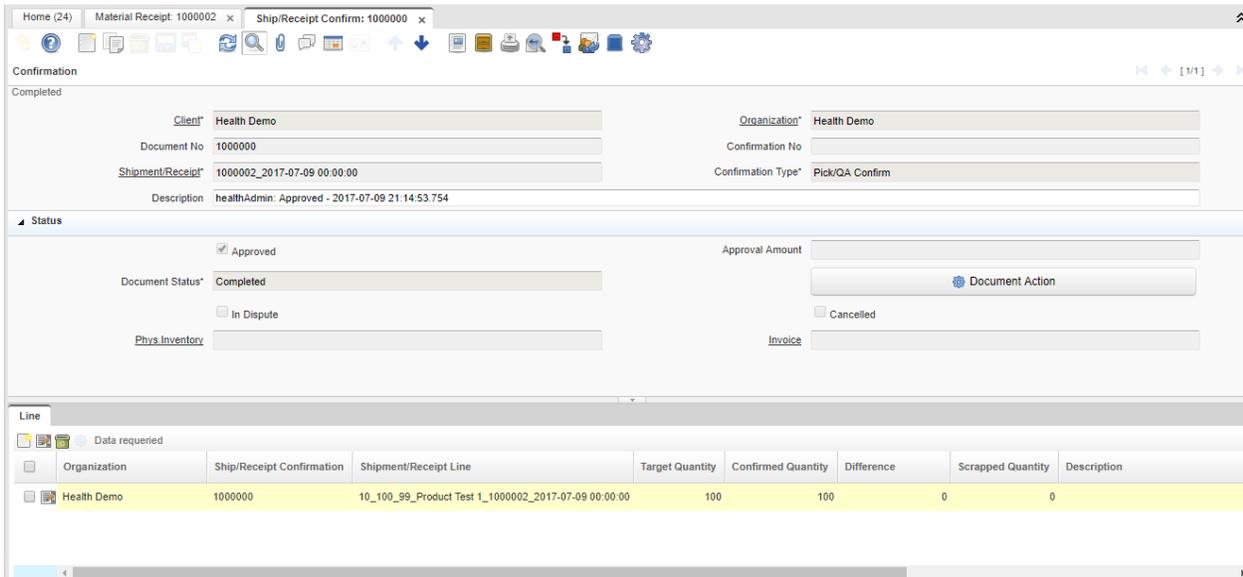
This process generates the Ship/Receipt Confirmation document.



Organization	Ship/Receipt Confirmation	Shipment/Receipt Line	Target Quantity	Confirmed Quantity	Difference	Scrapped Quantity	Description
Health Demo	1000000	10_100_99_Product Test 1_1000002_2017-07-09 00:00:00	100	100	0	0	

It is possible to enter this document by this route:

Menu - Material Management – Ship/Receipt Confirm



Confirmation
Completed

Client* Health Demo Organization* Health Demo
 Document No 1000000 Confirmation No
 Shipment/Receipt* 1000002_2017-07-09 00:00:00 Confirmation Type* Pick/QA Confirm
 Description healthAdmin: Approved - 2017-07-09 21:14:53.754

▲ Status

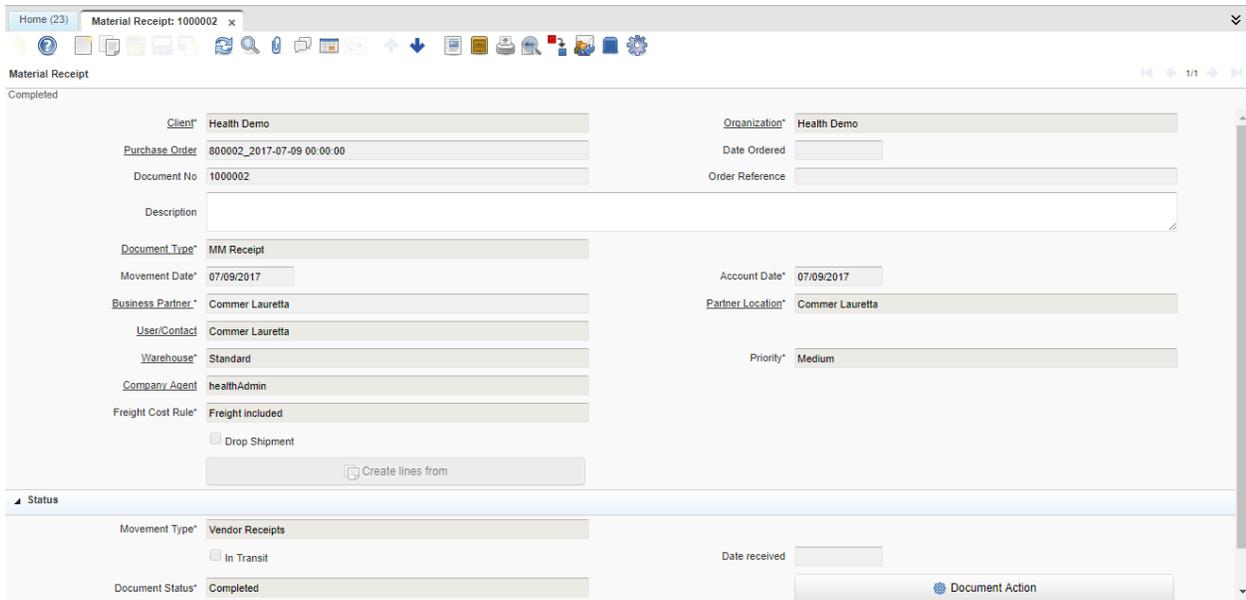
Approved Approval Amount
 Document Status* Completed [Document Action](#)
 In Dispute Cancelled
 Phys Inventory Invoice

Line

Organization	Ship/Receipt Confirmation	Shipment/Receipt Line	Target Quantity	Confirmed Quantity	Difference	Scrapped Quantity	Description
Health Demo	1000000	10_100_S9_Product Test 1_1000002_2017-07-09 00:00:00	100	100	0	0	

Document is completed.

We return to the Material Receipt document and complete it.



Material Receipt
Completed

Client* Health Demo Organization* Health Demo
 Purchase Order 800002_2017-07-09 00:00:00 Date Ordered
 Document No 1000002 Order Reference
 Description
 Document Type* MM Receipt
 Movement Date* 07/09/2017 Account Date* 07/09/2017
 Business Partner* Commer Laurreta Partner Location* Commer Laurreta
 User/Contact* Commer Laurreta
 Warehouse* Standard Priority* Medium
 Company Agent healthAdmin
 Freight Cost Rule* Freight included
 Drop Shipment
[Create lines from](#)

▲ Status

Movement Type* Vendor Receipts Date received
 In Transit
 Document Status* Completed [Document Action](#)

This document affected the inventory

Menu - Material Management – Material Management Rules - Product

Home (23) | Material Receipt: 1000002 | Product: 99 Product Test 1

Product > Transactions

Sorted: #6

Organization	Product	Attribute Set Instance	Active	Locator	Movement Quantity	Movement Date	Movement Type	Receipt Line	Phys.Inventory Line
Health Demo	99_Product Test 1		<input checked="" type="checkbox"/>	Standard	100	07/09/2017	Vendor Receipts	10_100_99_Product Test 1_100	
Health Demo	99_Product Test 1		<input checked="" type="checkbox"/>	Standard	5	05/23/2017	Vendor Receipts	10_5_99_Product Test 1_10000	
Health Demo	99_Product Test 1		<input checked="" type="checkbox"/>	Standard	-2	05/23/2017	Customer Shipment	10_2_99_Product Test 1_55000	
Health Demo	99_Product Test 1		<input checked="" type="checkbox"/>	Standard	-1	05/23/2017	Movement From		10_1_620000
Health Demo	99_Product Test 1		<input checked="" type="checkbox"/>	Standard	-1	05/23/2017	Inventory Out		10_1_620000
Health Demo	99_Product Test 1		<input checked="" type="checkbox"/>	Other 1*0*0*0	1	05/23/2017	Movement To		

From the Material Receipt document we can consult all the traceability, the other documents with which it has originated from.

Home (23) | Material Receipt: 1000002 | Product: 99 Product Test 1

Material Receipt > Receipt Line

Client: Health Demo | Organization: Health Demo

Receipt: 1000002_2017-07-09 00:00:00 | Purchase Order Line: 800002_2017-07-09 00:00:00_10_1000

Line No: 10 | Product: 99_Product Test 1 | Attribute Set Instance:

Locator: Standard | Description:

Quantities

Quantity: 100 | UOM: Each

Movement Quantity: 100

Picked Quantity: 100 | Target Quantity: 100

Confirmations | Matched POs | Matched Invoices

Organization	Receipt Line	Ship/Receipt Confirmation	Ship/Receipt Confirmation Line	Confirmation No	Target Quantity	Confirmed Quantity	Difference	Scrapped Quantity
Health Demo	10_100_99_Product Test 1_100	1000000	1000000		100	100	0	0

From this Material Receipt document we proceed to generate the invoice (vendor).

Material Receipt: 1000001 x



Generate Invoice from Receipt

Create Confirmation

Date Ordered

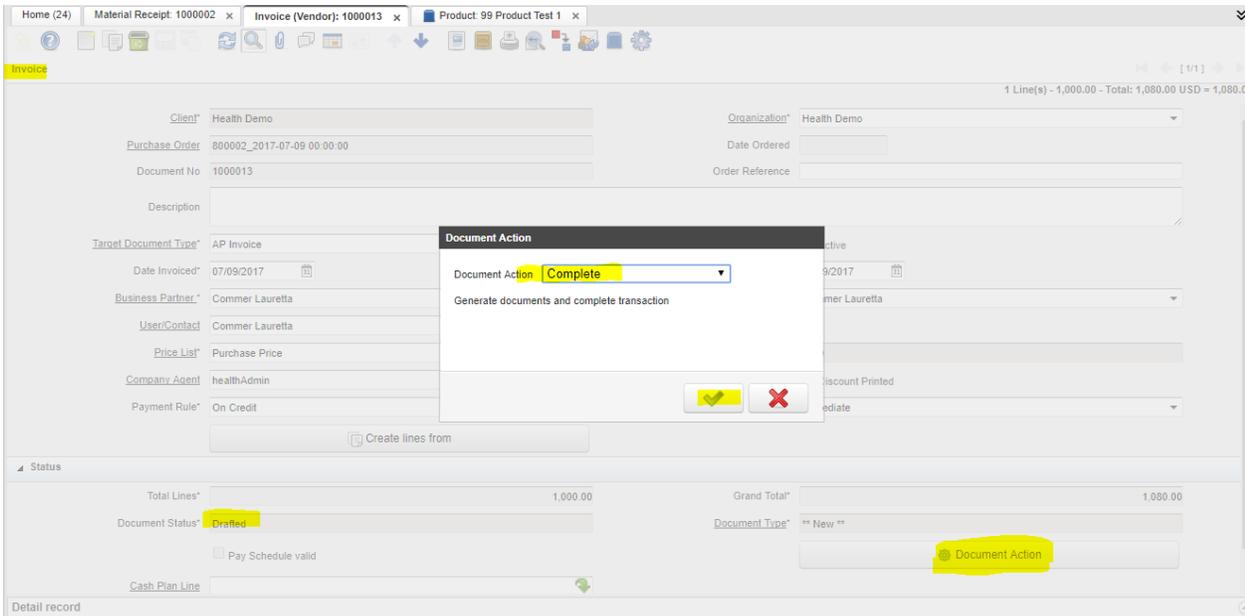
Order Reference

Material Receipt: 1000002 x

 **Material Receipt: 1000002**
[Jul 9, 2017 12:00:00 AM COT 1080.00 1000013](#)

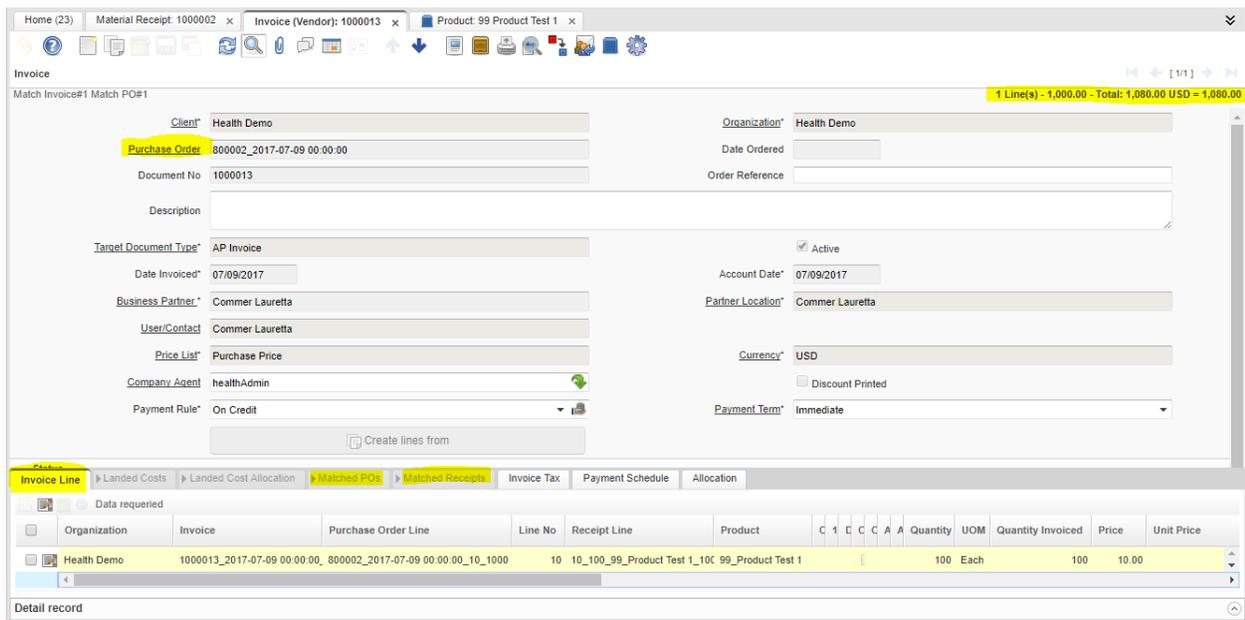


3.5. Invoice (Vendor)



The screenshot shows the 'Invoice (Vendor)' form in the SmartJSP application. A 'Document Action' dialog box is open, showing 'Document Action' set to 'Complete' and the instruction 'Generate documents and complete transaction'. The form fields include Client (Health Demo), Organization (Health Demo), Purchase Order (800002_2017-07-09 00:00:00), Document No (1000013), Date Invoiced (07/09/2017), Business Partner (Commer Laurreta), User/Contact (Commer Laurreta), Price List (Purchase Price), Company Agent (healthAdmin), and Payment Rule (On Credit). The status bar shows 'Total Lines* 1,000.00' and 'Grand Total* 1,080.00'. The document status is 'Drafted'. A 'Document Action' button is highlighted in yellow at the bottom right.

Document is completed.
 This document is the one that affects accounts payable.



The screenshot shows the 'Invoice (Vendor)' form with the 'Invoice Line' tab selected. The form fields are the same as in the previous screenshot. The 'Invoice Line' tab shows a table with the following data:

Organization	Invoice	Purchase Order Line	Line No	Receipt Line	Product	C	1	D	C	A	A	Quantity	UOM	Quantity Invoiced	Price	Unit Price
Health Demo	1000013_2017-07-09 00:00:00	800002_2017-07-09 00:00:00_10_1000	10	10_100_99_Product Test 1_10C_99_Product Test 1								100	Each	100	10.00	

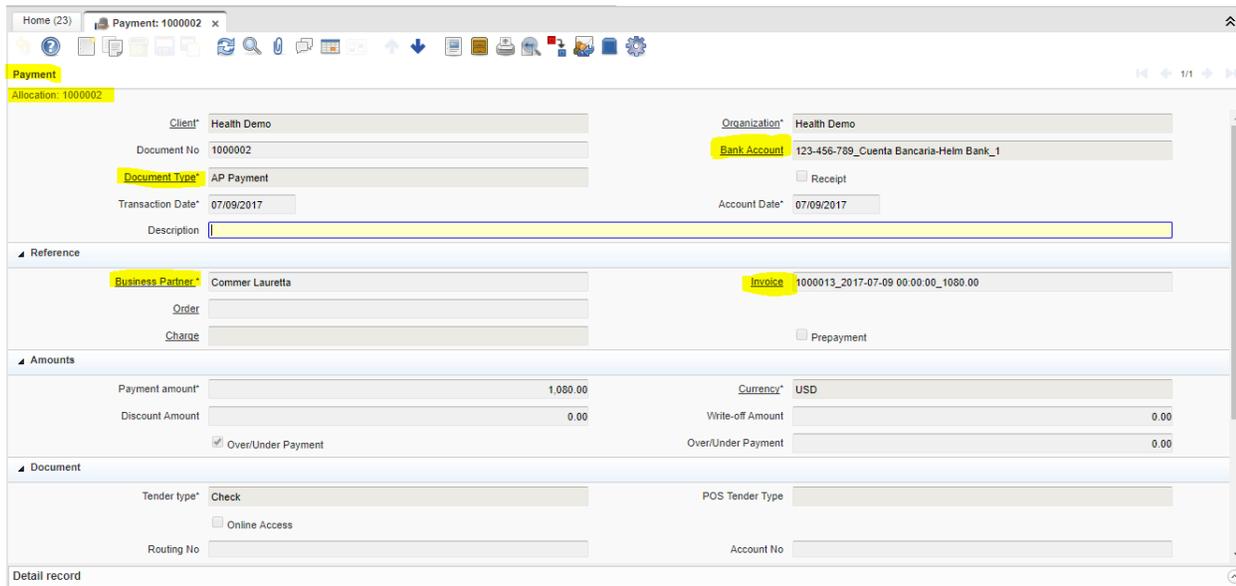
The status bar at the top right of the form shows '1 Line(s) - 1,000.00 - Total: 1,080.00 USD = 1,080.00'. The 'Invoice Line' tab is highlighted in yellow.

From the document Invoice(Vendor) we can consult all the traceability, the other documents with which it has originated from.

3.6. Invoice payment to supplier

Payable:

Menu – Open Items – Payment



The screenshot shows a web browser window with the title "Payment: 1000002". The page content is organized into several sections:

- Payment:** Allocation: 1000002. Client: Health Demo. Organization: Health Demo. Document No: 1000002. Bank Account: 123-456-789_Cuenta Bancaria-Helm Bank_1. Document Type: AP Payment. Transaction Date: 07/09/2017. Account Date: 07/09/2017. Description: [Empty field].
- Reference:** Business Partner: Commer Laretta. Invoice: 1000013_2017-07-09 00:00:00_1080 00. Order: [Empty field]. Charge: [Empty field]. Prepayment: [Unchecked checkbox].
- Amounts:** Payment amount: 1,080.00. Currency: USD. Discount Amount: 0.00. Write-off Amount: 0.00. Over/Under Payment: [Checked checkbox].
- Document:** Tender type: Check. POS Tender Type: [Empty field]. Online Access: [Unchecked checkbox]. Routing No: [Empty field]. Account No: [Empty field].

At the bottom of the form, there is a "Detail record" section with a scroll icon.

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