

Memorandum of Understanding

Module Guide: Memorandum of Understanding (MOU)

Module Location

Sales > Memorandum of Understanding

Module Objective

The **Memorandum of Understanding (MOU)** module is used to create, manage, and track formal cooperation agreement documents with customers, especially for distributors or key clients. This MOU document serves as the master contract that defines all agreed-upon business and commercial terms, such as credit limits, sales targets, and payment terms.

1. Main View (MOU List)

The main page of this module displays a list of all MOU documents that have been created.

The screenshot shows the main view of the MOU List module. At the top, there is a breadcrumb trail: Sales | Memorandum of Understanding | Memorandum of Understanding. Below this, there are search and filter options. The search criteria include MOU Number (Any Part of Field) and NONE. There are buttons for Search and Show All. The filters include Item Category (FINISHED GOOD), Status (All), Date From (1 August 2025), and Date To (31 August 2025). There are also buttons for Document Filter Status and Approval Filter Status. The table below shows the columns for the MOU list: No., MOU Number, MOU Date, Last Update MOU, Customer Name, Regional, Product, Target, Bank Guarantee, Credit Limit, Document Status, Approval Status, Attachment File, and Status. The table is currently empty, showing "...: No Record Found :...". There are buttons for New, Print, and Change Status at the bottom.

No.	MOU Number	MOU Date	Last Update MOU	Customer Name	Regional	Product	Target	Bank Guarantee	Credit Limit	Document Status	Approval Status	Attachment File	Status
...: No Record Found :...													

View Explanation & Filters

This page is for viewing and managing all MOU agreements.

- **Filters:** You can search for a specific MOU by **MOU Number**, **Item Category**, **Status**, or a date range (**Date From / Date To**).
- **MOU List:** The table below displays a summary of each MOU, with important columns such as **MOU Number**, **Customer Name**, **Regional**, **Target**, **Bank Guarantee**, and **Credit Limit**.

Button Functions

- **New:** The primary button to create a new MOU document.
- **Delete:** To delete a selected MOU.
- **Print:** To print the details of a selected MOU.

2. Steps to Create a New MOU

Step 1: Create a New MOU

From the Main View, click the **New** button to open the **Add MOU** form. 

Step 2: Fill in MOU Details

Fill in all the relevant information on the form that appears, which is divided into several sections:

- **Basic Information:**

- MOU Number, MOU Due Period, Customer, Regional,

MOU Number * : MOU2010825-xxxxxxxx

MOU Date Period* : From To

Customer * :

Regional * :

Product * :

- Trading Term:

- Complete all commercial requirements such as **Discount**, **Payment Term**, **Target**, **Return Allowance**, **Credit Limit**, and **Bank Guarantee**.

Discount * : Regular: % Or

Payment Term * :

Return * : Open Return % Return Allowance %

Credit Limit * :

- Distributor Conditions:

- If the customer is a distributor, fill in their capacity data such as **Number Of Branches**, **Number Of Warehouse**, and **Number Of Salesman**.

Branch

NumberOfBranches : [+] [-]

<input type="checkbox"/>	Branch	Address	Status
<input type="checkbox"/>	<input type="text" value="None"/>	<input type="text"/>	<input checked="" type="radio"/> Own Home <input type="radio"/> Rent

Numberofwarehouse :

NumberOfwarehouse : [+] [-]

<input type="checkbox"/>	Warehouse	Address	Status
<input type="checkbox"/>	<input type="text" value="None"/>	<input type="text"/>	<input checked="" type="radio"/> Own Home <input type="radio"/> Rent

NumberOf Salesman :

Step 3: Save and Confirm

After all data is filled in, use the buttons in the bottom-left section:

- Save:** To save the MOU as a draft.

- **Confirm:** To finalize and send the MOU into the approval workflow.
- **Cancel:** To cancel the entry.

Tips & Important Notes

- The MOU that is created and approved here will become the **basis for all transactions** with the related customer.
- Ensure all commercial terms such as **Credit Limit** and **Payment Term** are filled in accurately, as the system will likely use this data for automatic transaction validation.
- An MOU that has been **Confirmed** will likely go to an **MOU Inbox** for further approval by management.

Revision #1

Created 5 August 2025 09:10:13 by Muhammad Ali Akbar

Updated 5 August 2025 09:20:49 by Muhammad Ali Akbar