How to Collect Patronage Volumes

Pre-requisites:

- Patronage Categories
- Configured Patron Customer
- Configured Patron Item

The system will record the patronage volumes separately by the assigned Patronage Category of each item. Generally, patronage volumes are classified by **Fiscal Year, Customer, and Item Patronage Category (Purchase/Sale & Unit/Amount)**. Fiscal year of a volume is identified from the creation date of the transaction. If transactions were made on the same year, it will accumulate the patronage volume for that year. The Stock Status of a Customer /Vendor should be configured for it to be qualified for volume collection regardless of the stock status. As for the setup of the item patronage category, **Purchase** type implies that the volume will be recorded from Voucher, while **Sales** will be from Invoice. Volume quantities are calculated from the assigned **Unit /Amount**. See the computation below:

For **Unit** type:

Billed/Shipped Qty x Stock Unit Qty = Patronage Volume

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*Note: If the transaction is not in Stock UOM, the quantity to be record will be converted to stock unit.
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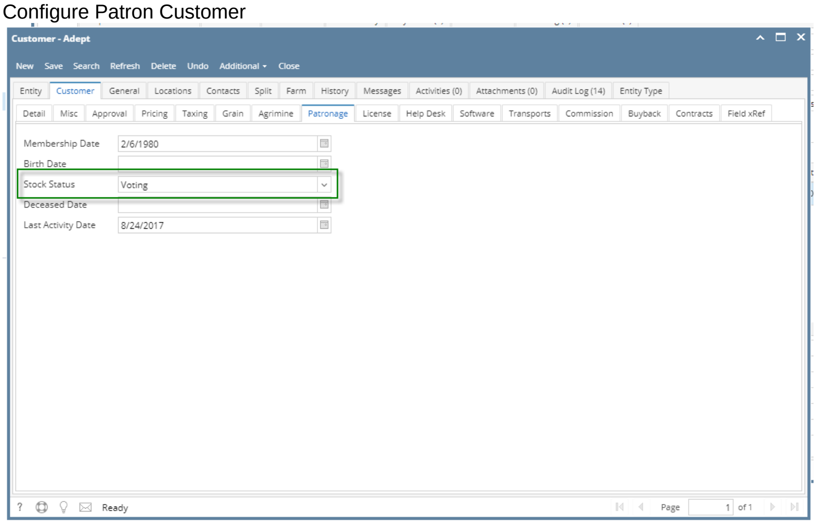
For **Amount** type:

Billed/Shipped Qty x Price = Patronage Volume

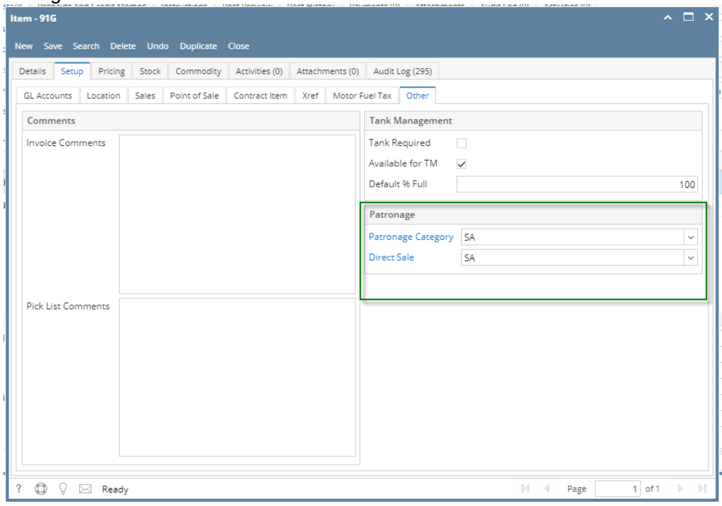
Patronage volumes will be collected upon posting the transaction and will be reversed when unposted. Take note that there are transactions which are qualified for patronage volume collection(such as; Inventory Shipment, Inventory Receipt) as they create Voucher or Invoice for that specific transaction. The collected patronage volumes can be checked from the Volume Details screen. The screen will show the summary of the volumes collected in a year and per customer. Lastly, the total quantity of purchase and sale volume will be showed in the screen.

See the illustration below for the sample volume collection:

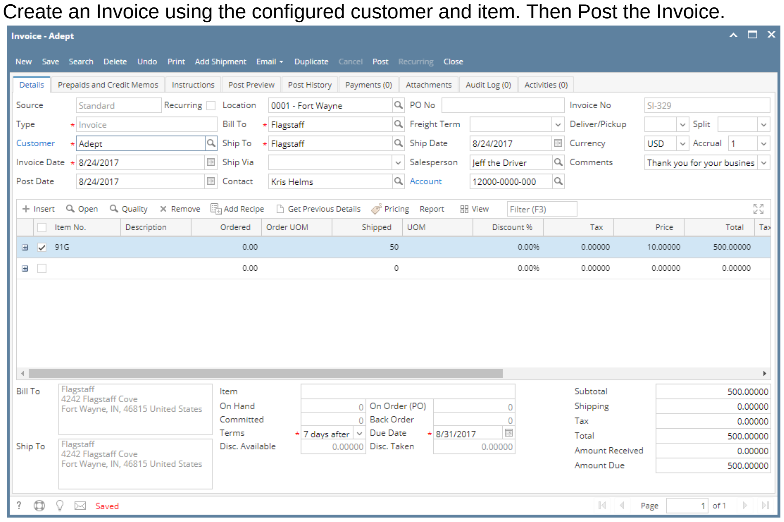
1. Configure Patron Customer



2. Configure Patron Item



3. Create an Invoice using the configured customer and item. Then Post the Invoice.



4. Check the Volume Gathered