



Global 3000 Service Pack Note

SOP - Order Lines Enquiry

| | | | |
|----------------|-----------------|--|--------|
| Author | DCP | | |
| Project | ZM60_000235.doc | | |
| Version | 1.0 | | 1 of 8 |

INTRODUCTION

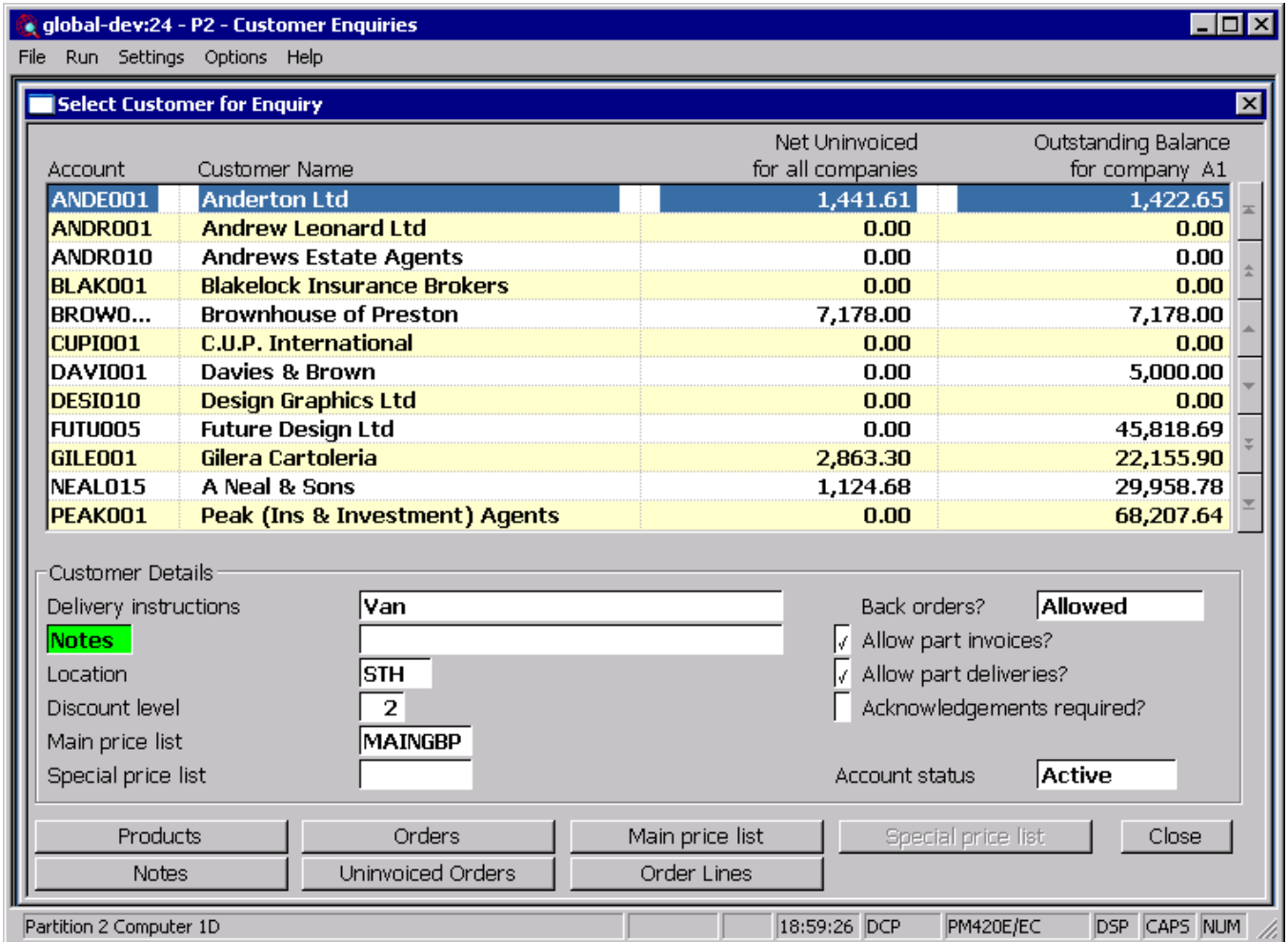
This service pack extends the SOP enquiry options available for customers and products to provide an order lines enquiry which allows the displayed lines to be filtered based on user selections.

The changes introduced by this service pack extend the SOP enquiry options available for customers to include a new button labelled 'Order Lines' and for products to include a new option labelled 'Sales order lines'. When the new button or option is pressed a list of all non archived order lines for the selected customer/product is displayed. The list of order lines can then be restricted based on the following criteria via a button labelled 'Filters'.

- Product (all/single).
- Customer (all/single).
- Transaction type.
- Sales location (all/single).
- Despatch location (all/single).
- Transactions dated (from/to).
- Back ordered lines (include/exclude).
- Forward ordered lines (include/exclude).
- Forward ordered lines (include/exclude).
- Allocated lines (include/exclude).
- Picked not despatched lines (include/exclude).
- Despatched not invoiced lines (include/exclude).
- Invoiced lines (include/exclude).

| | | |
|----------------|-----------------|--------|
| Author | DCP | |
| Project | ZM60_000235.doc | |
| Version | 1.0 | 2 of 8 |

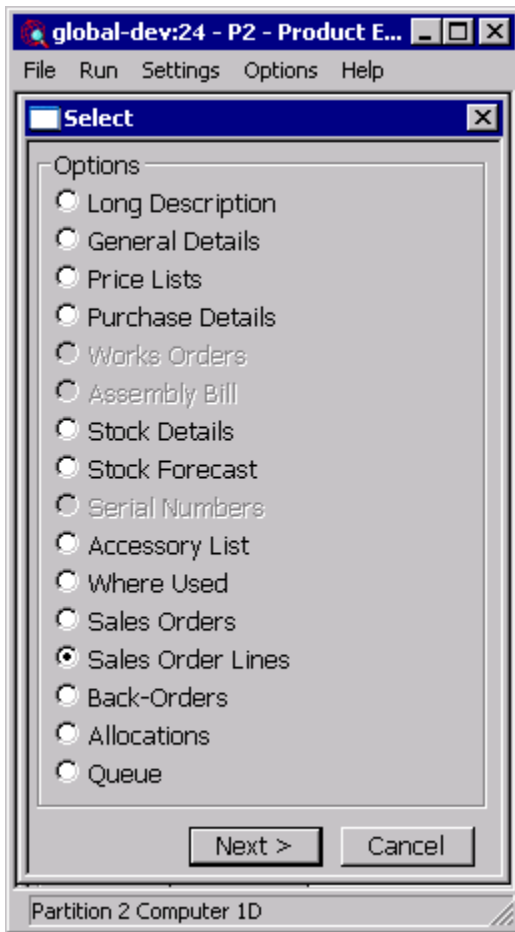
Select Customer for Enquiry



Order Lines Select this to view order lines (that have not been archived) for the customer.

| | |
|----------------|-----------------|
| Author | DCP |
| Project | ZM60_000235.doc |
| Version | 1.0 |

Product Enquiry Options



Sales Order Lines Select this to view order lines (that have not been archived) for the product.

| | | |
|----------------|-----------------|--------|
| Author | DCP | |
| Project | ZM60_000235.doc | |
| Version | 1.0 | 4 of 8 |

Sales Order Lines for Customer Window

| Product | Description | Order | Required | Original Qty | |
|----------|-------------------------------|----------|----------|--------------|------|
| ANTCT100 | Antec Typecart 100 | CRD00001 | 30/04/05 | 5 | ITEM |
| ANTCT100 | Antec Typecart 100 | ORD00011 | 16/01/05 | 100 | ITEM |
| ANTLBP8 | Antec Toner Cartridge SX S11 | ORD00011 | 16/01/05 | 50 | ITEM |
| AVPP1 | Victor Design 1 Portable OHP | ORD00011 | 16/01/05 | 1 | ITEM |
| BAN2850 | Banner Lev.Arch File A4 - Grn | ORD00011 | 16/01/05 | 1000 | ITEM |
| BAN2855 | Banner Lev.Arch File A4 - Y1w | ORD00011 | 16/01/05 | 1000 | ITEM |
| STA01 | Status Highlighter - Yellow | ORD00011 | 16/01/05 | 500 | ITEM |
| STA02 | Status Highlighter - Blue | ORD00011 | 16/01/05 | 500 | ITEM |
| ANTCT100 | Antec Typecart 100 | ORD00032 | 18/01/05 | 100 | ITEM |
| ANTLBP8 | Antec Toner Cartridge SX S11 | ORD00032 | 18/01/05 | 10 | ITEM |
| GAL02 | Galaxy Highlighter - Blue | ORD00032 | 18/01/05 | 1000 | ITEM |
| GAL02 | Galaxy Highlighter - Blue | ORD00032 | 18/01/05 | 500 | ITEM |
| GAL03 | Galaxy Highlighter - Green | ORD00032 | 18/01/05 | 750 | ITEM |

Order Details

Order number: CRD00001 Order reference: CRD00001 Status: [Status]

Order date: 30/04/2005 Order status: Override Type: Credit

Line Quantities

| | | |
|-----------------|-------|------|
| Original | 5 | ITEM |
| Allocated | 0 | |
| Back ordered | 0 | |
| Forward ordered | 0 | |
| Requested | 0 | |
| Reserved | 0 | |
| Returned | 5 | |
| Credited | 5 | |
| Outstanding | 0.00 | GBP |
| Credited value | 33.16 | GBP |

Details

Location: STH Tax code: S

Price source: List Price: 7.17 ITEM

Total value: 33.16 GBP

Total discount: 7.50 %

Total weight: 0.50

Total cost: 16.63 GBP

Order Details Line Details Comments Close

Invoice Address Delivery Address Filters

Partition 2 Computer 1D 19:01:13 DCP PM420E/WC DSP CAPS NUM

Purpose This window lists sales order lines (that have not been archived) for the currently selected customer. The order lines can then be filtered to provide user specific enquiries.

The buttons are:

Filters This prompts the user for criteria used to limit the order lines that are included in the list.

Order Details This displays details for the order.

Invoice Address This displays the invoice address for the order.

Delivery Address This displays the delivery address for the order.

Line Details This displays further details for the order line.

Comments This displays the comments entered for the order line.

Close This exits the window.

| | | |
|----------------|-----------------|--------|
| Author | DCP | |
| Project | ZM60_000235.doc | |
| Version | 1.0 | 5 of 8 |

Sales Order Lines for Product Window

| Account | Name | Order | Required | Original Qty |
|---------|--------------------|----------|----------|--------------|
| ANDE001 | Anderton Ltd | CRD00001 | 30/04/05 | 5 ITEM |
| NEAL015 | A Neal & Sons | INV00177 | | 4 ITEM |
| GILE001 | Gilera Cartoleria | ORD00004 | 15/01/05 | 200 ITEM |
| ANDE001 | Anderton Ltd | ORD00011 | 16/01/05 | 100 ITEM |
| PRIC010 | Price & Partners | ORD00012 | 16/01/05 | 200 ITEM |
| REPS001 | Repsol Marine UK | ORD00023 | 19/01/05 | 200 ITEM |
| GILE001 | Gilera Cartoleria | ORD00028 | 19/01/05 | 100 ITEM |
| ANDE001 | Anderton Ltd | ORD00032 | 18/01/05 | 100 ITEM |
| ANDR001 | Andrew Leonard Ltd | ORD00040 | 11/02/05 | 100 ITEM |
| NEAL015 | A Neal & Sons | ORD00047 | 16/02/05 | 100 ITEM |
| ANDE001 | Anderton Ltd | ORD00055 | 20/02/05 | 100 ITEM |
| ANDE001 | Anderton Ltd | ORD00056 | 20/02/05 | 200 ITEM |
| DAVI001 | Davies & Brown | ORD00060 | 20/02/05 | 100 ITEM |

Order Details

Order number: Order reference: Status:

Order date: Order status: Type:

Line Quantities

| | | |
|------------------|-------------------------------------|-----------------------------------|
| Original | <input type="text" value="100"/> | <input type="text" value="ITEM"/> |
| Allocated | <input type="text" value="0"/> | |
| Back ordered | <input type="text" value="0"/> | |
| Forward ordered | <input type="text" value="0"/> | |
| Requested | <input type="text" value="0"/> | |
| Reserved | <input type="text" value="0"/> | |
| Delivered/Issued | <input type="text" value="100"/> | |
| Invoiced | <input type="text" value="100"/> | |
| Outstanding | <input type="text" value="0.00"/> | <input type="text" value="GBP"/> |
| Invoiced value | <input type="text" value="663.23"/> | <input type="text" value="GBP"/> |

Details

| | | |
|----------------|-------------------------------------|-----------------------------------|
| Location | <input type="text" value="MID"/> | |
| Tax code | <input type="text" value="S"/> | |
| Price source | <input type="text" value="List"/> | |
| Price | <input type="text" value="7.17"/> | <input type="text" value="ITEM"/> |
| Total value | <input type="text" value="663.23"/> | <input type="text" value="GBP"/> |
| Total discount | <input type="text" value="7.50"/> | <input type="text" value="%"/> |
| Total weight | <input type="text" value="10.00"/> | |
| Total cost | <input type="text" value="334.40"/> | <input type="text" value="GBP"/> |

Order Details | Invoice Address | Line Details | Delivery Address | Comments | Filters | Close

Purpose This window lists sales order lines (that have not been archived) for the currently selected product. The order lines can then be filtered to provide user specific enquiries.

The buttons are:

- Filters** This prompts the user for criteria used to limit the order lines that are included in the list.
- Order Details** This displays details for the order.
- Invoice Address** This displays the invoice address for the order.
- Delivery Address** This displays the delivery address for the order.
- Line Details** This displays further details for the order line.
- Comments** This displays the comments entered for the order line.
- Close** This exits the window.

| | |
|----------------|-----------------|
| Author | DCP |
| Project | ZM60_000235.doc |
| Version | 1.0 |

SOP Transaction Line Filters Window

global-dev:24 - P2 - Customer Enquiries

File Run Settings Options Help

SOP Transaction Line Filters

Information
The settings in this window can be used to limit the transaction lines included in the current enquiry window.

Filters

Product []

Account ANDE001 Anderton Ltd

Type All

Sales location []

Despatch location []

Transactions dated From [] To []

Include held transactions?

Include back ordered lines?

Include forward ordered lines?

Include allocated lines?

Include picked not despatched lines?

Include despatched not invoiced lines?

Include fully invoiced lines?

Search Reset OK Cancel

Partition 2 Computer 1D 19:03:12 DCP PM420E/FW

Purpose The settings in this window can be used to limit the SOP transaction lines displayed in the current enquiry window.

The prompts are:

Product *(Only if viewing order lines for a selected customer)* Only lines for the selected product will be displayed, to display order lines for all products leave this blank. A look-up is available.

Customer *(Only if viewing order lines for a selected product)* Only lines for the selected customer will be displayed, to display order lines for all customers leave this blank. A look-up is available.

| | | | |
|----------------|-----------------|--|--------|
| Author | DCP | | |
| Project | ZM60_000235.doc | | |
| Version | 1.0 | | 7 of 8 |

Type This controls the type of transaction lines displayed. The settings are:

- All
- Sales Order
- Back-to-Back
- Call-off
- Scheduled
- Invoice
- Credit note
- Direct
- Quotation

Sales location *(Multiple location systems only)* Only lines for the selected sales location will be displayed, to display lines for all sales locations leave this blank. A look-up is available.

Despatch location *(Multiple location systems only)* Only lines for the selected despatch location will be displayed, to display lines for all despatch locations leave this blank. A look-up is available.

Transactions dated (from/to) Transactions dated within the specified range are included in the list. Both the 'from' date and the 'to' date can be left blank to signify that a date check is not required.

Include held transactions? When set lines for held transactions are included in the list.

Include back ordered lines? When set lines with a back ordered quantity are included in the list.

Include forward ordered lines? When set lines with a forward ordered quantity are included in the list.

Include allocated lines? When set lines with an allocated quantity that has not been picked are included in the list.

Include picked not despatched lines? When set lines with a picked quantity are included in the list.

Include despatched not invoiced lines? When set lines with a despatched quantity are included in the list.

Invoiced lines? When set fully invoiced lines are included in the list.

The buttons are:

Search *(Where available)* Provides a look-up for the current item.

Reset This resets all items to their initial defaults.

OK This exits the window and applies the selections made to the current enquiry window.

Cancel This exits the window without applying any of the selections made.

| | | | |
|----------------|-----------------|--|--------|
| Author | DCP | | |
| Project | ZM60_000235.doc | | |
| Version | 1.0 | | 8 of 8 |