



Global 3000 Service Pack Note

SOP Emailed Invoices - Revisions

Author	DCP	
Project	ZM60_000284.doc	
Version	1.0	1 of 5

INTRODUCTION

This service pack provides the ability to limit the number of collated invoices and credit notes delivered via email (in a single PDF format attachment file). It also allows a 'Cc' email address to be specified for invoices and credit notes.

Note: These changes apply to both invoices and credit notes.

The changes are:

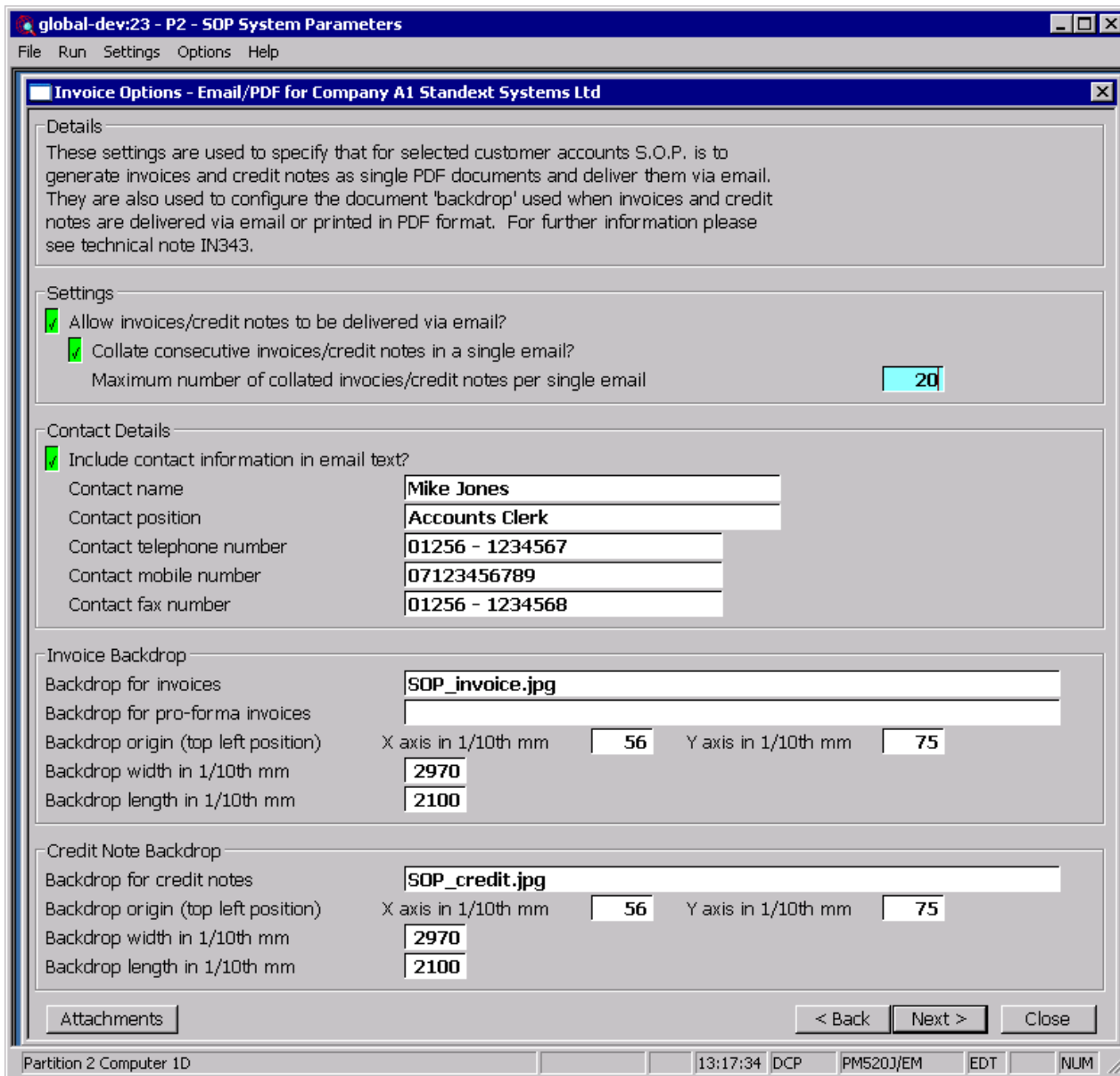
A new system parameter labelled 'Maximum number of collated invoices/credit notes per single email' has been added. This limits the number of consecutive invoices or credit notes (for the same customer) that are collated in to a single PDF format attachment file and delivered via a single email.

A new customer setting has been added that allows a 'Cc' email address to be specified to which each emailed invoice or credit note is copied.

Author	DCP	
Project	ZM60_000284.doc	
Version	1.0	2 of 5

DOCUMENTATION CHANGES

System Maintenance, SOP, Invoice Options – PDF/Email



Author	DCP	
Project	ZM60_000284.doc	
Version	1.0	3 of 5

Collate consecutive invoices/credit notes in a single email?

Set this if SOP is to collate invoices or credit notes as a single PDF format document (per customer) when they are delivered via email.

When the email is created the subject is automatically set to “Invoices from ccccccccccccccccccccccccccccccccccc where ‘cccccccccccccccccccccccccccccccccc’ is the company name. The text of the email is set to “Please find attached invoices xxxxxxxx” where ‘xxxxxxx’ is a list of the invoice numbers included in the PDF format attachment file. For credit notes the word ‘Invoice’ is replaced with ‘Credit Note’.

Note

The following limitations apply:

- Only consecutive documents for the same customer account are collated, it is therefore advised that if this option is used invoices and credit notes are produced in customer account sequence.
- Only documents generated in the same invoice/credit note run are collated.
- For practical reasons (attachment file size etc) SOP limits the number of invoices or credit notes that can be collated in to a single email to 250. However this limit can be lowered using the following prompt.
- The name of the PDF format attachment file containing collated invoices or credit notes is always the reference number of the first document within the file.

Maximum number of collated invoices/credit notes per single email

Enter a maximum number (up to 250) of consecutive documents (for the same customer) that can be collated and delivered in a single email. Leave this zero to use the systems maximum (250).

Author	DCP	
Project	ZM60_000284.doc	
Version	1.0	4 of 5

Customer Maintenance – SOP Parameters

global-dev:23 - P2 - Customer Details Company: A1 Period: 3/2005

File Run Settings Options Help

General Details

Customer Name Postcode EDI Account

Company Details for WAT5010 (Watsons Plc) (TS)

Customer SOP Parameters

SOP Details

Main price list: MAINGBP
 Special price list:
 Allow sale of products stocked at all locations
 Restrict to location: MID
 Delivery code: VAN
 Default location:
 Trade discount scheme: FILE
 Trade discount level: 1
 Delivery charge:
 Line/Trailer comment:
 Negotiated discount: 0.00
 Delivery confirmation:
 Number of labels: 0
 Payment method: Normal
 Cross-border cash book:

Email Settings

Email quotations?
 Email:
 Email acknowledgements?
 Email:
 Email delivery notes?
 Email:
 Email invoices and credit notes?
 Email: daniel.penfold@tissoft.co.uk
 Cc Email: dan@global3000.co.uk

SOP Settings

Back orders?: Allowed
 Allow part delivery?
 Combine orders for deliveries?
 Allow part invoice?
 Acknowledgements required?
 Combine invoices?
 Email confirmation of delivery?
 Email confirmation of EDI Orders?

Search OK Close

Partition 2 Computer 1D 13:25:08 DCP DL41YA/W6 EDT NUM

Cc email address for invoices and credit notes *(Only if emailing invoices and credit notes).* Enter a Cc email address to which copies of invoices and credit notes are to be sent. A look-up of existing contact records (containing an email address) for the customer is available.

Author	DCP	
Project	ZM60_000284.doc	
Version	1.0	5 of 5