



Global 3000 Enhancement Note S.O.P. Order By Product

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INTRODUCTION

This enhancement provides a facility which lists previous products ordered by a customer and allows individual products to be selected and transaction lines created for them.

This enhancement provides a new option within the S.O.P. Transaction Desktop, the new option lists previous products invoiced by the currently selected customer. Products can then be selected from the list (and a quantity to be 'ordered' specified), on completion the selected products are automatically added to the current transaction.

A new button labelled 'Template' has been added to the Transaction Desktop, it is found within the 'Functions' group box. The new 'Template' button is only available when adding/inserting a transaction line and at the product prompt. Pressing the new button displays the 'Order by Product' window which contains a list of previously invoiced products for the current customer.

DOCUMENTATION CHANGES

Transaction Desktop

Template *(Only available at the product prompt when adding a new line. Not available when adding a scheduled, call-off or back-to-back order.)* This lists previously invoiced products for the customer, products can then be selected and quantities specified for inclusion as new lines on the current transaction.

Order by Product

Purpose This window lists previously invoiced products for the customer, products can then be selected and quantities specified for inclusion as new lines on the current transaction.

The prompts are:

Product *(Display Only)* The product code (or the product alias code) and its description.

Add to Transaction *(Display Only)* This indicates whether or not the product has been selected for inclusion in the list of products for which transaction lines will be generated.

Please note If a product is obsolete or superseded it cannot be added, if it is required it must be added to the transaction manually.

Quantity *(Not for extras or comments.)* Enter the required quantity of the product.

Unit *(Not for extras or comments.)* Enter a valid unit for the product. A pop-up enquiry is available.

Please note If the unit selected is not the stock unit the quantity ordered is converted into stock units for internal handling by the software. If either the quantity or the conversion factor is not a whole number, the quantity ordered may be rounded as a result of the conversion process. If this happens you are warned and the stock unit equivalents of the quantity and unit are also displayed.

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- In Stock** *(Display Only)*. The quantity currently in stock in the unit shown.
- Last invoice** *(Display Only)*. The invoice number from which the preceding date and quantity are taken.
- Date** *(Display Only)*. The date the customer was last invoiced for the product.
- Quantity last invoiced** *(Display Only)*. The last quantity invoiced.
- Price paid at last invoice** *(Display Only)*. The price paid when the customer was last invoiced for this product.
- Pricelist used** *(Display Only)*. The pricelist from which the preceding price was taken.
- Select** *(Only if the product is not currently 'selected')* This adds the current product to the list of products for which transaction lines are to be generated. When a product is selected you are prompted for the quantity and unit to be used for the resulting transaction line.
- Deselect** *(Only for 'selected' products)* This removes the current product from the list of products for which transaction lines are to be generated.
- All** This adds all unselected products to the list of products for which transaction lines are to be generated, you are not prompted for the quantities and units to be used for the resulting transaction lines.
- Remove** *(Only if the product is not currently 'selected')* This removes the current product from the list of previously invoiced products.
- Please note** Removed products are re-added to the list when a transaction line for them is next invoiced to the customer.
- Amend** *(Only for 'selected' products)* This allows the quantity and unit to be amended.
- Generate** This returns to the Transaction Desktop and generates transaction lines for all currently 'selected' products using the quantities specified.
- Cancel** This abandons the current selections and returns to the Transaction Desktop. No transaction lines are generated.

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