

## Global 3000 Service Pack Note

## SOP Customer Facing Documents -Company Name and Address

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Project	ZS60_000157.doc	
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#### INTRODUCTION

The requirement is to provide the ability to suppress the company name and address from SO.P. Invoices, Credit Notes, Quotations, Acknowledgements and Delivery Notes.

Five new system parameters have been added which control whether or not the company name and address are included on the document when SOP Invoices (including pro-forma invoices), Credit Notes, Quotations, Acknowledgements and Delivery Notes are printed (in both standard and PDF format) or delivered via email.

The new parameters are labelled:

- Include company name and address on invoices?
- Include company name and address on credit notes?
- Include company name and address on quotations?
- Include company name and address on acknowledgements?
- Include company name and address on delivery notes?

The initial defaults for all five new parameters are to include the company name and address on the documents.

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#### System Maintenance, SOP, Invoice Options

💐 global-dev:24 - P2 - SOP System Parameters	⊐ ×
File Run Settings Options Help	
Invoice Options - Part 1	×
_ Details	
If part invoicing is disallowed, orders will only be invoiced after they have been completely delivered and confirmed. This option can be over- ridden for an individual customer or order.	
Invoice goods on direct delivery should not be enabled if Direct Order Confirm in P.O.P is used to confirm deliveries. Enable it if purchasing is handled independently and there is no link from P.O.P to S.O.P.	
Enabling print invoices immediately allows invoices to be printed at Order Entry.	
When 'Include company name and address on invoices' is enabled the company name and address details are included whenever an invoice is printed (in both standard or PDF format) or delivered via email.	
⊢ Parameters	_
Allow part invoicing?	
Print back ordered lines on invoice?	
Invoice goods on direct delivery?	
🖌 Print direct invoices immediately?	
🖌 Combine orders onto a single invoice?	
✓ Include company name and address on invoices?	
Next > Close	
Partition 2 Computer 1D 21:51:09 DCP PM520J/S9	ED //,

Include company name and address on invoices? When set, the company name and address is included when invoices (including pro-forma invoices) are printed (both in standard and PDF format) and delivered via email.

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#### System Maintenance, SOP, Acknowledgements

💐 global-dev:24 - P2 - SOP System Parameters 📃 🗖	×
File Run Settings Options Help	
Acknowledgements	×
Details Enable Acknowledgements required if acknowledgements are normally printed for all orders (selected orders can be suppressed).	
Enable Immediate acknowledgements allowed to provide the option of printing an acknowledgement during order entry. When 'Include company name and address on acknowledgements' is enabled the company name and address details are included whenever an acknowledgement is printed (in both standard or PDF format) or delivered via email.	
Parameters  Acknowledgements required ?  Acknowledgements allowed ?  Immediate acknowledgements allowed ?  Include company name and address on acknowledgements?	
Next > Close	
Partition 2 Computer 1D         21:46:42         DCP         PM520B/SO         EDT	<i>[]</i> //

Include company name and address on

When set, the company name and address is included when acknowledgements are printed (both in standard and PDF format) and delivered via email.

acknowledgements?

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### System Maintenance, SOP, Quotations

💐 global-dev:24 - P2 - SOP System Parameters	_ 🗆 ×
File Run Settings Options Help	
Quotation Options for Company A1	×
Enable 'Quotations in use' to allow creation of quotes within order	
entry and the transaction desktop.	
Enable 'Immediate quotations allowed' to allow printing of quotes from within order entry and the transaction desktop.	
within order entry and the transaction desktop.	
Enable 'Exclude quotations from the outstanding orders total' to	
exclude the values of quotations from the oustanding/uninvoiced orders total shown in enquiries and from the value of outstanding	
orders used for credit checking.	
When 'Automatically purge expired quotations' is enabled an expiry date can be specified as each quotation is entered. The system will	
check for and purge any expired quotations (that have not been converted	
to orders on a daily basis. The expiry date for quotations defaults to the date of entry plus the number of days to retain quotations system	
parameter.	
When 'Include company name and address on quotations' is enabled the	
company name and address details are included whenever a quotation is	
printed (in both standard or PDF format) or delivered via email.	
Quotations in use?	
Immediate quotations allowed?	
Exclude quotations from the outstanding orders total?	
Automatically purge expired quotations?	
Include company name and address on quotations?	
Next > Clos	e
Partition 2 Computer 1D 21:52:25 DCP PM520B/5N	ED //

Include company name and address on quotations? When set, the company name and address is included when quotations are printed (both in standard and PDF format) and delivered via email.

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# System Maintenance, SOP, Delivery – Delivery Note Options

🕵 global-dev:24 - P2 - SOP System Parameters 📃 🖂 🔀			
File Run Settings Options Help			
Delivery Note Options			
Details			
These options control the printing and content of delivery notes.			
Part deliveries applies to picking lists as well as delivery notes.			
If delivery notes are not required this suppresses all printing and bypasses all the remaining delivery note options.			
Immediate delivery notes can be printed from transaction entry.			
Documents sorted by product or bin are sorted as required when you exit the order. Note that directly keyed comments (with a blank code) delimit the sort; long descriptions should normally be used instead.			
When 'Include company name and address on delivery notes' is enabled the company name and address details are included whenever a delivery note is printed (in both standard or PDF format) or delivered via email.			
Parameters Allow part deliveries? Delivery notes required?			
🖌 Immediate delivery notes allowed?			
Include company name and address on delivery notes?			
Sort documents? Not required 🔽			
Next > Close			
Partition 2 Computer 1D 21:53:42 DCP PM520I/57 ED			

Include company name and address on delivery notes?

When set, the company name and address is included when delivery notes are printed (both in standard and PDF format) and delivered via email.

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#### System Maintenance, SOP, Credit Note Options

💐 global-dev:24 - P2 - SOP System Parameters	. 🗆 🗙
File Run Settings Options Help	
Credit Note Options	×
<ul> <li>Details</li> <li>Specify the Default Status of Goods when a credit note is created, to return the goods to stock so they can be issued to another order, or to write off the goods. In the latter case you may then use the stock adjustments facility of stock control to set the correct status and value of the returned goods. This can be amended on each credit note.</li> <li>The Zero cost write-off credit notes concerns the value posted to Sales Analysis. By posting a zero value you are effectively making the write off the fault of the customer (as opposed to you or your supplier).</li> <li>When 'Include company name and address on credit notes' is enabled the company name and address details are included whenever a credit note is printed (in both standard or PDF format) or delivered via email.</li> </ul>	
Parameters	
Default status of goods? Return to stock	
Zero cost write-off credit notes	
Clos	e
Partition 2 Computer 1D 21:55:33 DCP PM520B/SR	ED //,

Include company name and address on credit notes? When set, the company name and address is included when credit notes are printed (both in standard and PDF format) and delivered via email.

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