



Global 3000 Service Pack Note User Profiles

Author	DCP	
Project	ZM60_000311.doc	
Version	1.0	1 of 12

INTRODUCTION

This service pack extends the SOP Transaction Desktop profile and the DL and CL Transaction profiles to provide administrator options.

There are three functions within the software that allow operator specific configuration settings (known as “profiles”). These are Debtors Ledger Transaction Entry, Creditors Ledger Transaction Entry and the SOP Transaction Desktop. The operator profiles can be viewed and amended via the ‘Set-up’ button in these functions.

The changes extend system parameters (Administration) to add a new option labelled ‘Profile Administrator Options’. When selected, default profiles can be defined for use when an operator does not have their own specific profile for use in Debtors Ledger Transaction Entry, Creditors Ledger Transaction Entry and the SOP Transaction Desktop. In addition, options are included that control the use of operator specific profiles.

DOCUMENTATION CHANGES

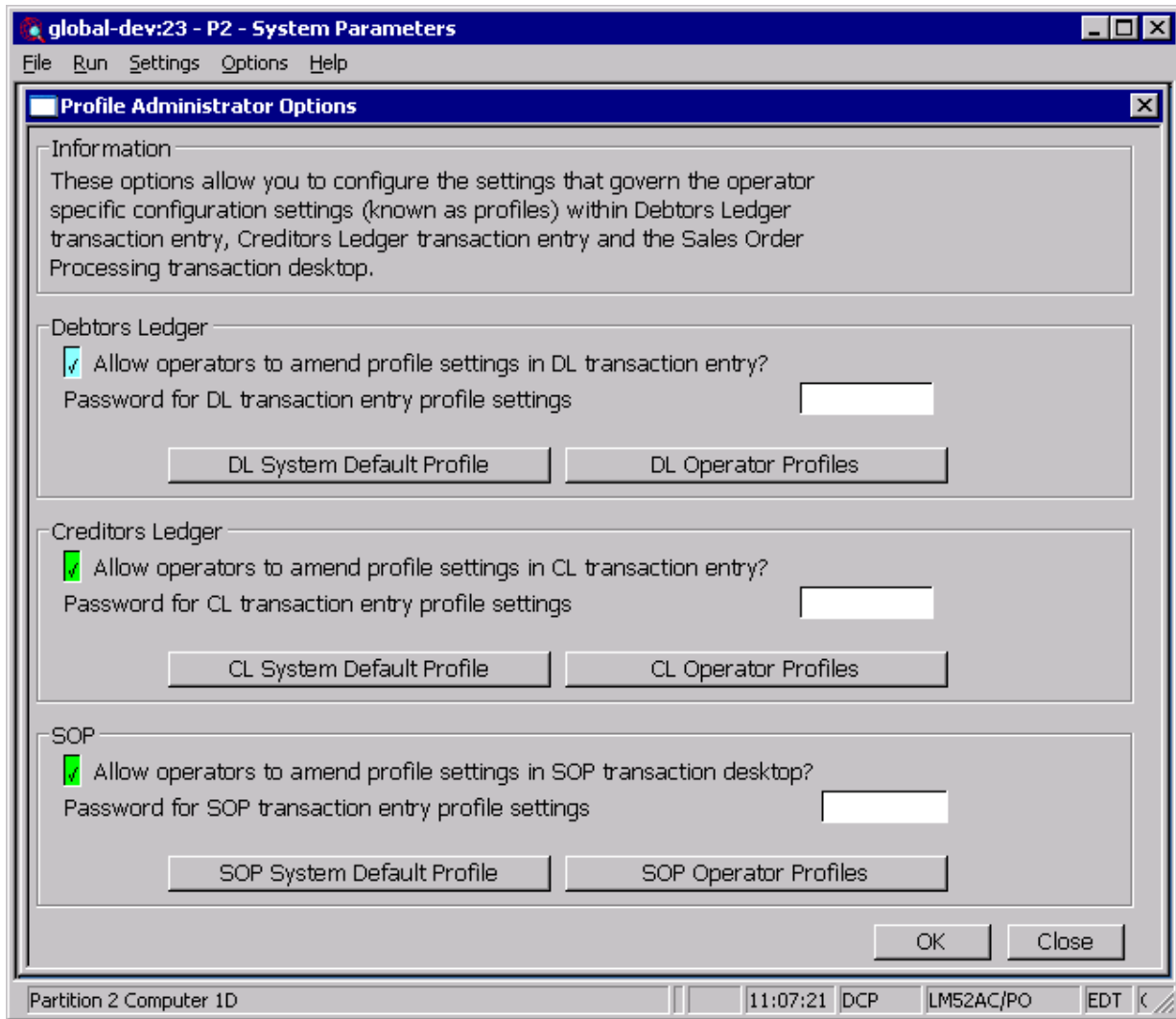
System Parameters – Administration Parameters



Profile Administrator Options These parameters control the operator specific profile settings for Debtors Ledger Transaction Entry, Creditors Ledger Transaction Entry and the SOP Transaction Desktop.

Author	DCP	
Project	ZM60_000311.doc	
Version	1.0	2 of 12

Administration Parameters – Profile Administrator Options Window



This window appears when you select 'Profile Administrator Options' from the Administration Parameters Menu.

Purpose This window allows you to configure options that govern the operator specific configuration settings (known as profiles) within Debtors Ledger Transaction Entry, Creditors Ledger Transaction Entry and the SOP Transaction Desktop.

It also allows you to define a default profile for use when an operator does not have a specific profile for Debtors Ledger Transaction Entry, Creditors Ledger Transaction Entry or the SOP Transaction Desktop.

Author	DCP	
Project	ZM60_000311.doc	
Version	1.0	3 of 12

The prompts are:

Allow operators to amend profile settings in DL Transaction Entry?

When set users can configure their own profile settings for use in Debtors Ledger Transaction Entry. If this is not set then the <Set-Up> button in Debtors Ledger Transaction Entry is not available.

Password for DL Transaction Entry profile settings

A password can be specified which (if set) must be entered by the operator before their profile settings can be amended within Debtors Ledger Transaction Entry. Leave this blank if no password is required.

Allow operators to amend profile settings in CL Transaction Entry?

When set users can configure their own profile settings for use in Creditors Ledger Transaction Entry. If this is not set then the <Set-Up> button in Creditors Ledger Transaction Entry is not available.

Password for CL Transaction Entry profile settings

A password can be specified which (if set) must be entered by the operator before their profile settings can be amended within Creditors Ledger Transaction Entry. Leave this blank if no password is required.

Allow operators to amend profile settings in the SOP Transaction Desktop?

When set users can configure their own profile settings for use in the SOP Transaction Desktop. If this is not set then the <Set-Up> button in the SOP Transaction Desktop is not available.

Password for SOP Transaction Desktop profile settings

A password can be specified which (if set) must be entered by the operator before their profile settings can be amended within the SOP Transaction Desktop. Leave this blank if no password is required.

The buttons are:

System Default Profile

This allows a system default profile to be established for use when an operator does not have their own specific profile.

Operator Profiles

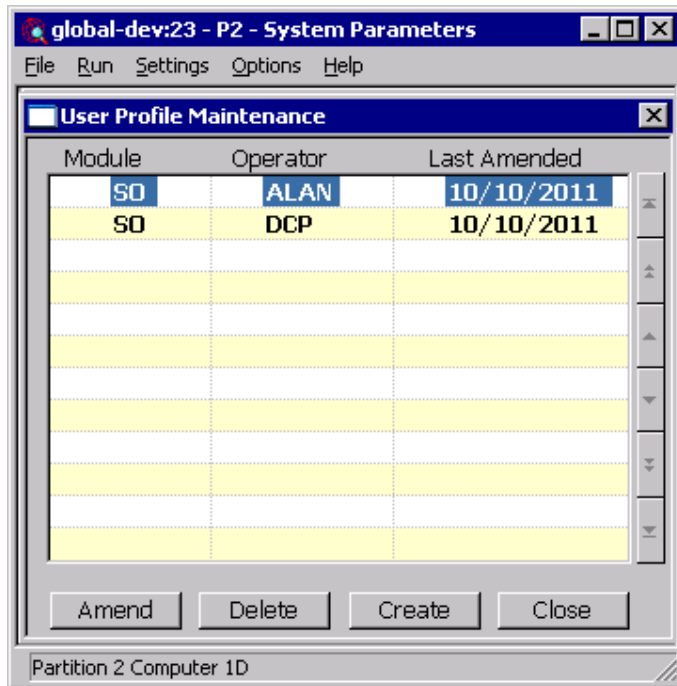
This allows operator specific profiles to be viewed, amended or deleted.

Note

The above two buttons are repeated for Debtors Ledger Transaction Entry, Creditors Ledger Transaction Entry and the SOP Transaction Desktop.

Author	DCP	
Project	ZM60_000311.doc	
Version	1.0	4 of 12

Administration Parameters – Operator Profiles Window



This window appears when you press one of the 'Operator Profiles' buttons in the Profile Administrator Options window.

Purpose This window lists operators which have a specific profile defined. Its contents depend on which of the 'Operator Profiles' button was pressed in the Profile Administrator Options window.

The prompts are:

Module *(Display Only)*. The module for the profile.

Operator *(Display Only)*. The operator id to which the profile belongs.

Last Amended *(Display Only)*. The date on which the profile was last updated.

The buttons are:

Amend This allows the currently high-lighted profile to be viewed and amended.

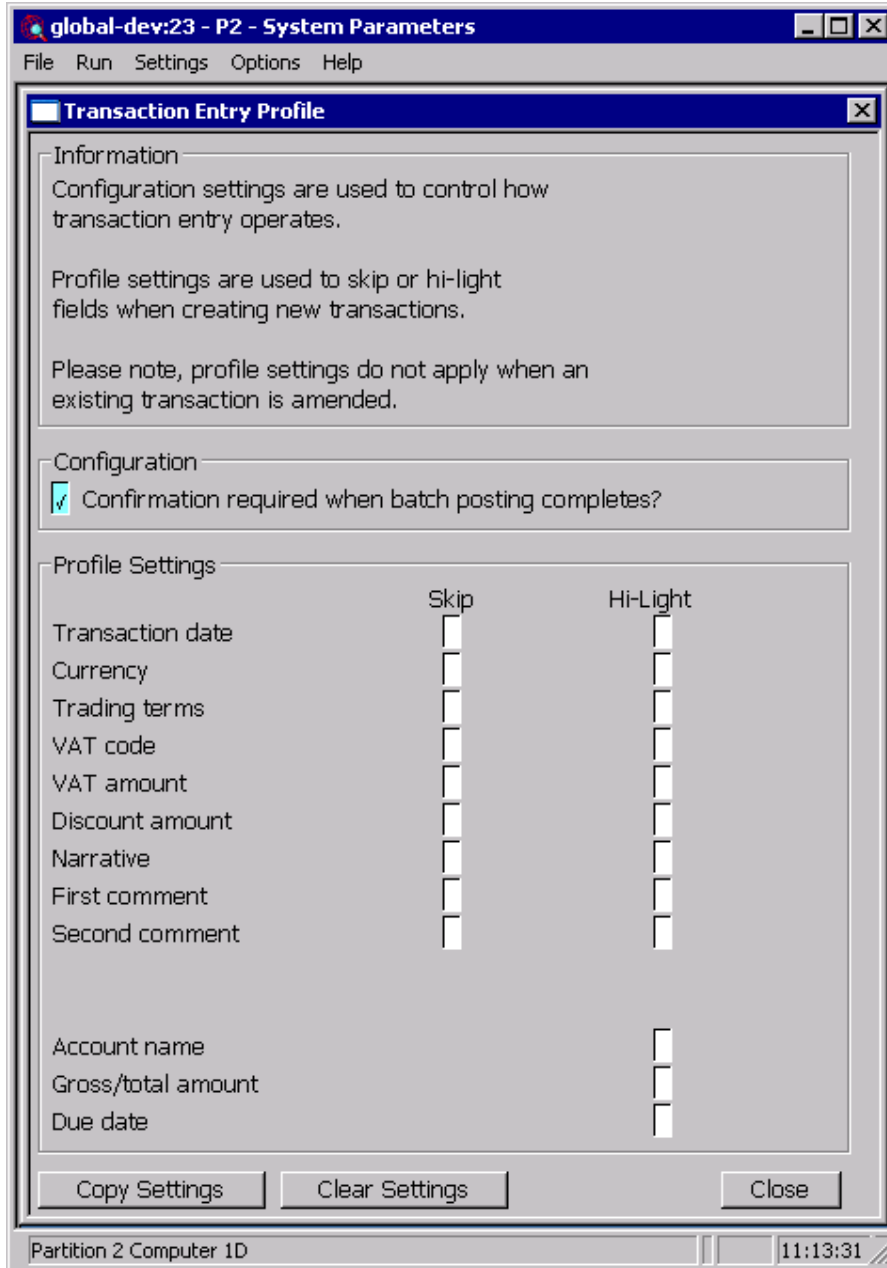
Delete This deletes the currently high-lighted profile.

Create This prompts for an operator id and allows a new profile to be created.

Close This returns to the Profile Options window.

Author	DCP	
Project	ZM60_000311.doc	
Version	1.0	5 of 12

Transaction Entry Profile Window



This window appears when you select 'Set-up' from the 'Creditors Batches' or 'Debtors Batches' windows. It is also used when you choose to create a system default profile (for DL and CL Transaction Entry) or to amend a specific operators profile within the Profile Administrator Options.

Purpose This window allows each operator to set up a profile to be used whenever they create a new transaction line. It is also used to define a system default profile to be used for operators that do not have their own specific profile. The profile contains configuration settings which allow individual fields to be skipped whenever a new transaction is created and to specify

Author	DCP	
Project	ZM60_000311.doc	
Version	1.0	6 of 12

which fields are to be high-lighted within the transaction lines window. The profile also contains configuration settings which govern how transaction entry operates.

Note The profile settings do not apply when creating an allocations batch or when a Debtors Ledger Credit Claim is entered.

The prompts are:

Confirmation required when batch posting completes? When set the posting progress window remains on screen as each batch is successfully posted and must be manually closed.

Skip The following fields can be configured as being skipped during the creation of a new transaction line.

- Transaction date
- Currency
- Trading terms
- Tax code
- Tax amount
- Discount amount
- Narrative
- First comment
- Second comment
- Purchase order number (Creditors Ledger only)
- Hold invoice (Creditors Ledger only)

Note When a field is skipped it is set to its default value, it is still possible to select the field and change its value if required. Fields are only skipped when a new transaction line is created and the profile settings (for skipping fields) are not applied when amending an existing transaction.

Author	DCP	
Project	ZM60_000311.doc	
Version	1.0	7 of 12

Hi-Light The following fields can be configured as being hi-lighted within the transaction line entry window.

- Transaction date
- Currency
- Trading terms
- Tax code
- Tax amount
- Discount amount
- Narrative
- First comment
- Second comment
- Purchase order number (Creditors Ledger only)
- Hold invoice (Creditors Ledger only)
- Account name
- Gross/Total amount
- Due date

The buttons are:

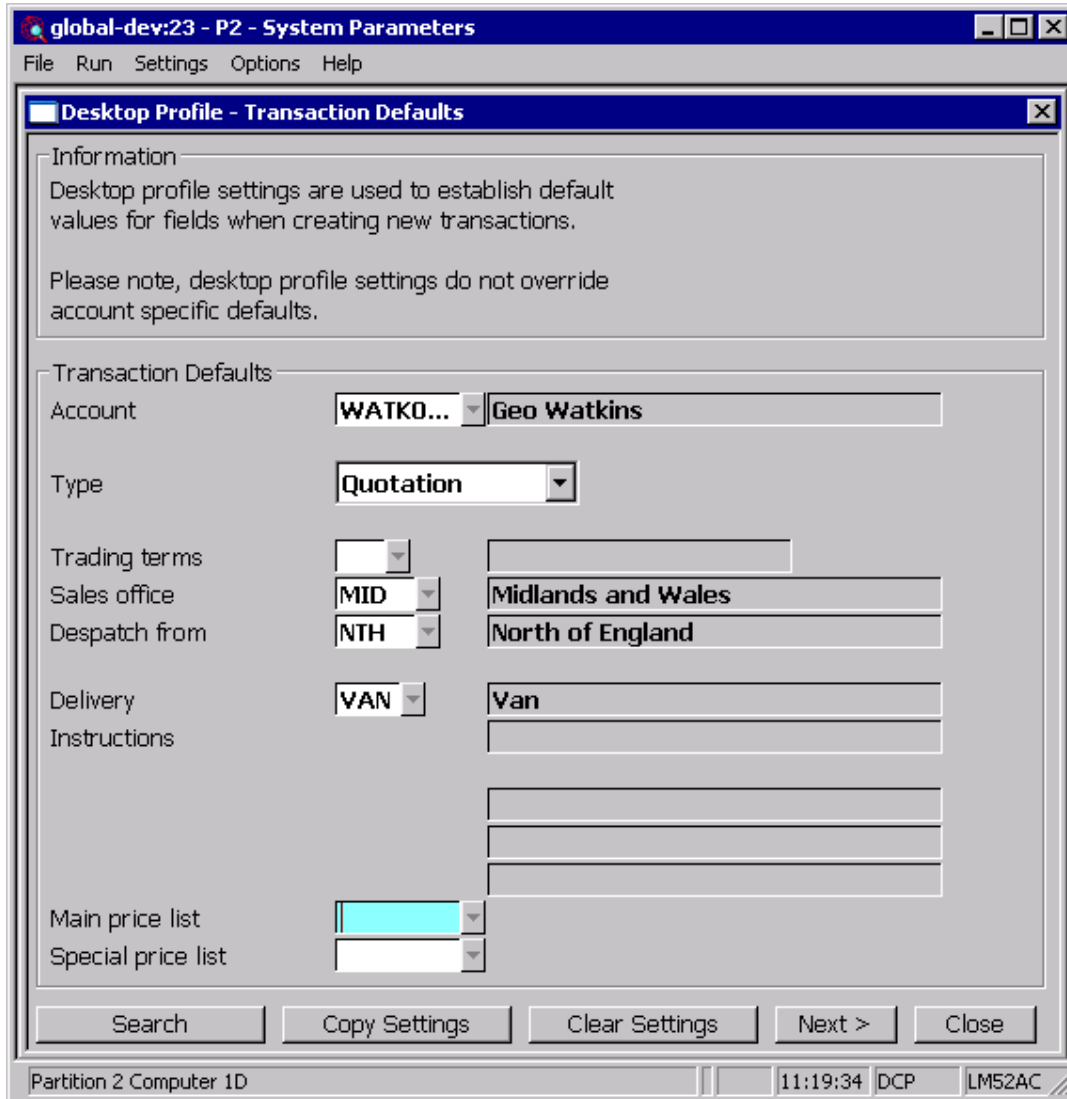
Copy Settings Select this to copy settings from another user's profile overwriting your existing profile settings. You are offered a list of existing users whose profile can be copied.

Clear Settings Select this to clear your existing profile settings.

Close Select this to save the current profile settings and return to the Profile Administrators Options window or the Creditors or Debtors Batches window.

Author	DCP	
Project	ZM60_000311.doc	
Version	1.0	8 of 12

Desktop Profile - Transaction Defaults Window



This window appears when you select 'Set-up' from the SOP Transaction Desktop window. It is also used when you choose to create a system default profile (for the SOP Transaction Desktop) or to amend a specific operators profile within the Profile Administrator Options.

Purpose This window allows each operator to set up a profile to be used whenever they create a new transaction. It is also used to define a system default profile to be used for operators that do not have their own specific profile. The profile contains settings which allow defaults to be established for use whenever a new transaction is created. The profile also contains configuration settings which govern how the Transaction Desktop operates.

Note Profile settings do not override customer account specific defaults.

Author	DCP
Project	ZM60_000311.doc
Version	1.0

The prompts are:

Defaults Defaults can be established for the following fields.

- Account
- Transaction type
- Trading terms
- Sales office
- Despatch from
- Delivery instructions
- Sales Rep.
- Territory
- Class
- Main price list
- Special price list

The buttons are:

Copy Settings Select this to copy settings from another user's profile overwriting your existing profile settings. You are offered a list of existing users whose profile can be copied.

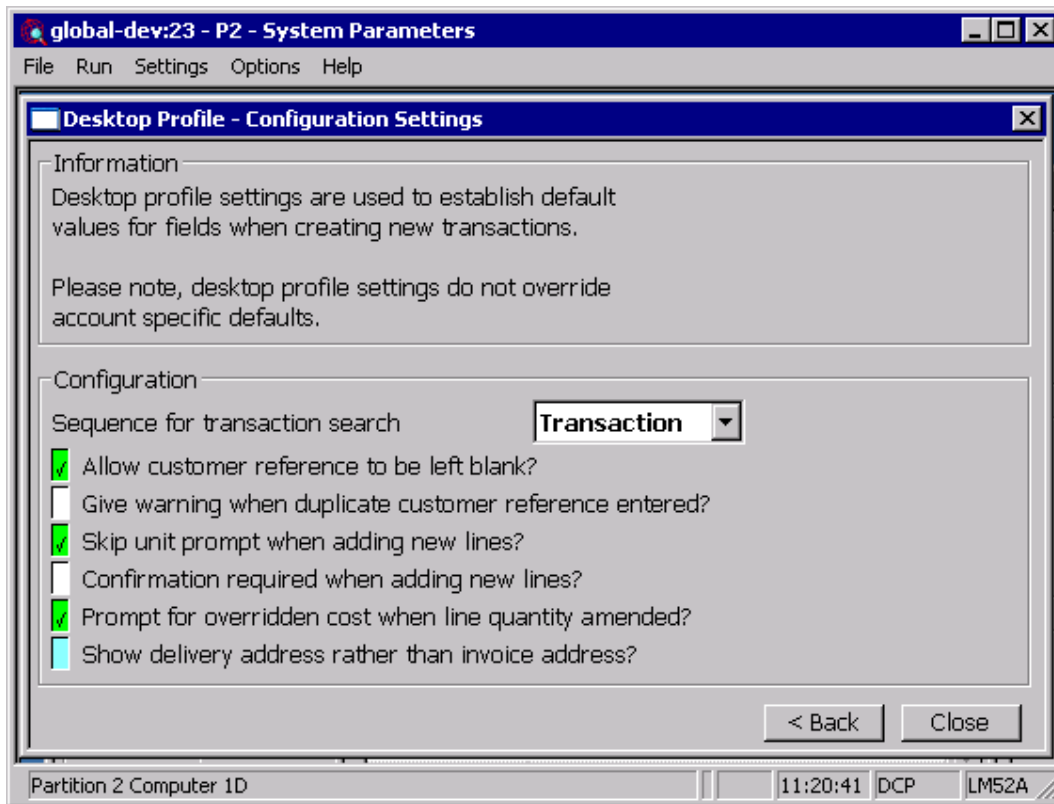
Clear Settings Select this to clear your existing profile settings.

Next> Select this to move to the Desktop Profile – Configuration Settings window.

Close Select this to save the current profile settings and return to the Profile Administrators Options window or the Transaction Desktop window.

Author	DCP	
Project	ZM60_000311.doc	
Version	1.0	10 of 12

Desktop Profile – Configuration Settings Window



This window appears when you complete your responses in the Desktop Profile – Transaction Defaults window.

Purpose These parameters control how the desktop operates when new transactions and new transaction lines are added.

The prompts are:

Sequence for transaction search? This controls the sequence in which transactions appear in the transaction search. Options are:-

- **Transaction** - list transactions in transaction reference ('our ref') sequence.
- **Account** - list transactions in customer account sequence.

Allow customer reference to be left blank? Set this to allow the customer reference to be left blank.

Give warning when duplicate customer references are entered? If this is set, the desktop displays a warning message if a customer reference is entered and the same reference has already been used for another transaction.

Author	DCP
Project	ZM60_000311.doc
Version	1.0

Skip unit prompt when adding new lines?

If this is set, the unit prompt is set to the default selling unit for the selected product and not prompted for when a new line is added to a transaction.

Confirmation required when adding new lines?

If this is set, the 'Confirm' button must be pressed to complete the entry of a new transaction line.

Prompt for overridden cost price if line quantity amended?

(Only available if the SOP Display Costs parameter is set) Set this to be prompted for the cost price if the quantity is updated on a line for which the cost price has been overridden

Show delivery address rather than invoice address?

Set this to show the delivery address and contact telephone number in the main Transaction Desktop window. If this is not set the address and contact telephone number shown are taken from the invoice address.

The buttons are:

Back>

Select this to return to the Desktop Profile – transaction Defaults window.

Close

Select this to save the current profile settings and return to the Profile Administrators Options window or the Transaction Desktop window.

Author	DCP	
Project	ZM60_000311.doc	
Version	1.0	12 of 12