



Global 3000 Service Pack Note SOP/POP Direct Ordering

INTRODUCTION

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This service pack provides the ability to link SOP direct orders to POP direct orders.

Prior to this service pack you could enter a direct order in both Sales Order Processing and Purchase Order Processing however they could not be linked. There was an SOP Invoicing system parameter ('Invoice goods on direct delivery') which although claimed to be a link between the two systems direct orders was documented (going back to V4.2) as awaiting development.

The changes are as follows:

- The existing SOP Invoicing parameter ('Invoice goods on direct delivery') has been removed.
- A new system parameter (labelled 'Generate direct purchase orders for direct sales orders?') has been added to the SOP Operating Options. When set, purchase orders are automatically created for products when a direct SOP order is entered and the SOP direct order cannot be invoiced until the corresponding purchase order has been fully invoiced.
- The SOP Transaction Desktop (and Order Entry) has been updated to allow the supplier to be specified and defaulted for direct orders (when linked to purchase orders).
- A new 'Order reference' has been added to the purchase order details window, this will be shown in enquiries and is available for use in purchase order print (note it is not included on the standard purchase order print layout).
- Enquiries has been updated so that it is possible to view a linked purchase order from a direct sales order and vice versa.

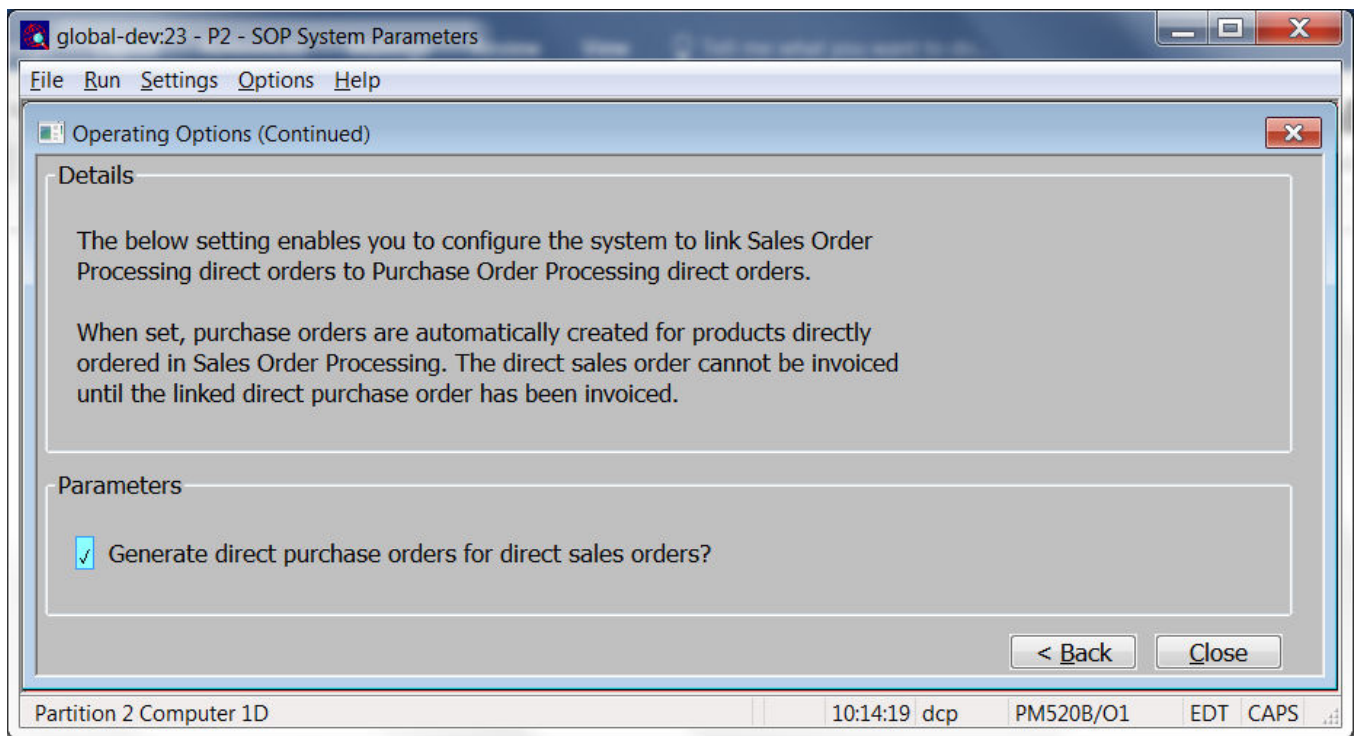
Notes:

- When the system is configured to generate direct purchase orders for direct sales orders only products with a supplier can be directly ordered. In addition, SOP direct orders can only be processed via the SOP transaction desktop and are not available within sales order entry.
- Lines for a direct sales order for which a direct purchase order has been generated cannot be amended or deleted once the linked purchase order has been fully or part invoiced.
- Amending the quantity on a line from a direct sales order will also amend the quantity on the corresponding line from the linked purchase order.
- Deleting a line from a direct sales order will also delete the corresponding line from the linked purchase order.

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DOCUMENTATION CHANGES

SOP System Parameters – Operating Options (Continued)



This window appears when you complete your responses in the first operating options window and Purchase Order Processing is in use.

Purpose This window allows you to configure the way in which Global 3000 Sales Order Processing operates.

The prompts are:

Generate direct purchase orders for direct sales orders? *(Only available if Purchase Order Processing is in use)* When set, purchase orders are automatically created for products when a direct SOP order is entered and cannot be invoiced until the corresponding purchase order has been fully invoiced.

- Notes**
- When the system is configured to generate direct purchase orders for direct sales orders only products with a supplier can be directly ordered.
 - If the system is configured to generate direct purchase orders for direct sales orders. the SOP transaction desktop must be used to process direct orders. It is not possible to enter or amend direct orders within sales order entry.
 - The purchase orders are generated when you finish entering the direct sales order. Once a direct purchase order has been created for a sales order line the supplier cannot be amended.
 - Lines for a direct sales order for which a direct purchase order has been generated cannot be amended or deleted once the linked purchase order has been printed/emailed or if any qty has been invoiced.
 - Amending/deleting a line from a direct sales order will also

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amend/delete the corresponding line from the linked purchase order.

- The cost price for a direct sales order line linked to a direct purchase order is initially set by Sales Order Processing but is updated to the actual cost once the linked purchase order is created.
- When a SOP direct order is generated by copying it from another transaction, lines for products that do not have a supplier are skipped.

SOP Transaction Desktop – Line Codes

global-dev:23 - P2 - Transaction Entry

File Run Settings Options Help

Line Codes

Details

Description **Galaxy Highlighter - Yellow**

Required by **31/05/2017**

Weight **24.00**

VAT code **S**

Supplier **ANT015 Antec (UK) Ltd**

Search Comments GL Codes OK Close

Partition 2 Computer 1D 10:27:54

Supplier (Only available for direct order lines that are yet to be linked to a purchase order) This is the supplier to whom a direct purchase order is to be sent in order to satisfy the current sales order line.

Note If the product is supplied by a single supplier then this is used as the default supplier for the line, if the product is supplied by more than one supplier then the product's 'usual supplier' at the despatch location is used as a default. If a default supplier cannot be established, then you are prompted for the supplier.

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POP Order Details

The screenshot shows a software window titled 'global-dev:23 - P2 - Purchase Order Entry'. The main area is titled 'Order Details' and is divided into several sections:

- Supplier:** A dropdown menu is set to 'ANT015', with 'Antec (UK) Ltd' displayed below it.
- Currency:** A dropdown menu is set to 'GBP'.
- Ship via Landed Costs?:** An unchecked checkbox.
- Details from:** A text field.
- Order Address:** A section with multiple text fields containing the address: 'Antec (UK) Ltd', 'Unit 38-40', 'Purley Way Industrial Estate', 'Purley Way', 'Croydon', 'Great Britain', and 'CR6 8JK'.
- Country:** A dropdown menu set to 'Great Britain'.
- Postcode:** A text field containing 'CR6 8JK'.
- Details:** A section with various fields:
 - Reference:** A text field containing 'O/REF ABC123'.
 - Order date:** A date picker.
 - Due date:** A date picker.
 - Last delivery:** A dropdown menu set to 'None'.
 - Terms:** A dropdown menu.
 - Acknowledgment:** A text field followed by 'on' and another text field.
 - Entered by:** A text field.
 - Approved by:** A text field.
 - Ordered value:** A text field containing '0.00'.
 - Delivered value:** A text field containing '0.00'.
 - Invoiced value:** A text field containing '0.00'.

At the bottom of the window, there are buttons for 'Search', 'Order Address', 'Exchange Rate', 'Apply', and 'Cancel'. The taskbar at the very bottom shows 'Partition 2 Computer 1D', the time '10:24:13 dcp', and other system information.

Reference Enter an optional reference which will appear in enquiries and is available for tailored purchase order printing.

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