



Global 3000 Service Pack Note

PDF Format Purchase Orders

Author	DCP		
Project	ZO60_000064.doc		
Version	1.0		1 of 14

INTRODUCTION

This service pack provides the ability to produce purchase orders in PDF format and deliver them via email. It also revises the dialogue within Purchase Order Print.

Note, throughout this document the term 'print/email' should be taken to mean physically print, deliver via email or export via Global 3000 EDI. Please also note that the term 'export' refers to the export of purchase orders via Global 3000 EDI.

Purchase order printing, emailing and exporting (via Global 3000 EDI) is now controlled by a single window. The window consists of the print/email options, followed by a number of buttons (described below). Another window is displayed (whilst at least one order has been selected order) to the right of the main window. This window is titled 'Selected Orders' and contains a scrolled list of the orders selected so far, this window remains on screen until the option to print/email the selected orders is selected.

The buttons are as follows:

Single Order – This prompts the user for a single order, once an order has been selected it is printed/emailed without further dialogue (apart from the standard print options window).

Review Selections – This changes focus to the 'Selected Orders' window. The user can then move through the list of selected orders. When reviewing selections a button labelled 'Remove' is available allowing the user to remove a selected order from the list.

Clear All Selections – This removes all currently selected orders (after user confirmation).

Individual Order – This prompts the user for an individual order to be printed/emailed (after prompting the user with new orders or reprint), each time an order is selected the 'Selected Orders' window is refreshed to show it has been selected.

Range of Orders – This prompts the user for a range of orders to be printed/emailed (after prompting the user with new orders or reprint), each time a range of orders is selected the 'Selected Orders' window is refreshed to show orders in the range that have been selected. A results window is also displayed showing the count of orders in the range and the counts for orders selected and not eligible for selection.

Print/Email Orders – This (after user confirmation) print/email all selected orders.

Cancel – Pressing this (after user confirmation) will exit the program without printing/emailing the selected orders.

The following should be noted:

- The emailing of purchase orders is an automated process and forms part of the purchase order print run, i.e. the user is not forced to run the program multiple times to select those suppliers for which orders are to be printed and those for which they are to be emailed.
- The emailing of purchase orders is a supplier based setting.
- The purchase order should be emailed as an attachment rather than being built into the body text of the email itself.
- It is possible to specify the backdrop to be used for each document type (at system level). A standard backdrop (landscape format) for purchase orders has been created and is available for download from

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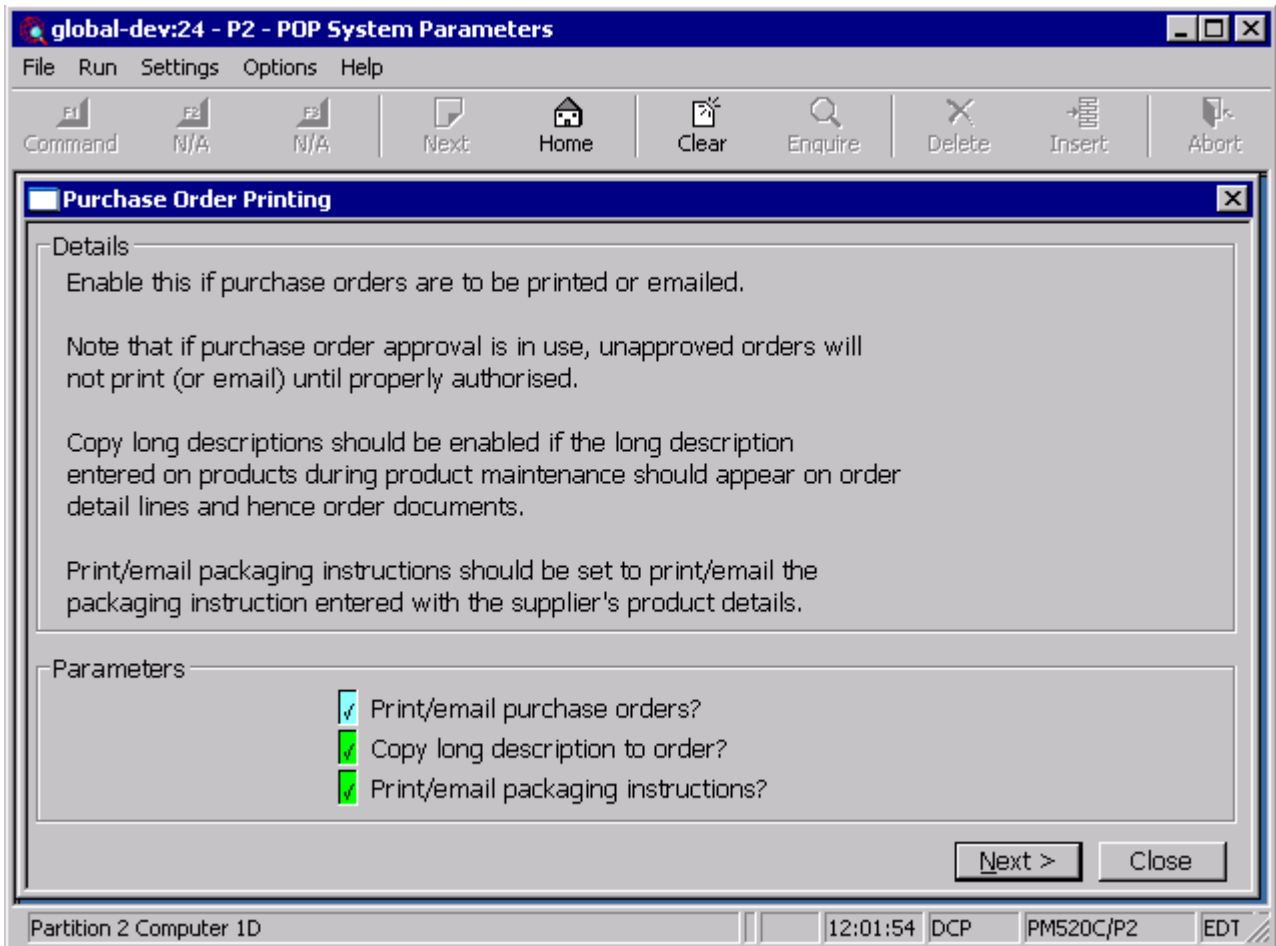
http://www.global3000.co.uk/pub/global3000/6.0/pop_order.zip

- Each document results in a single email, e.g. if a supplier has 25 purchase orders they will receive 25 separate emails.
- It is possible to specify up to five other files to be added as attachments to each emailed document. This allows marketing material or other documents (e.g. Terms and Conditions etc) to be sent with each emailed document.
- If an order is delivered via email it is not physically printed. The ability to produce printed copies of emailed order is provided in the form of an additional prompt in purchase order print.
- Purchase orders can be printed in PDF format. To print these documents in PDF format you must configure the backdrop (within system parameters) and during run time change the printer in the print options window to 'PDF Format'.
- Printing purchase orders in PDF format and delivering them via email requires an up-to-date copy of either PDF_In_The_Box or All_In_The_Box to be present on each GX client used to perform the invoice/credit note generation.

Technical Note: The Extended PF facility is used to generate the invoice/credit note that is emailed. For full details of the Extended PF facility please refer to Technical Note IN343.

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System Maintenance, POP, Purchase Order Printing Options



Print/email purchase orders Set this if purchase orders are to be printed and/or delivered via email.

Note If Global 3000 EDI is in use, this parameter also controls whether purchase orders can be exported via EDI; i.e. if this parameter is set, they can be printed, emailed and exported; if it is not set, they can be neither printed, emailed nor exported.

Note If the 'Order approval' System Parameter is set, purchase orders cannot be printed, emailed or exported until they have been approved.

Copy long description to order Set this to copy the long description associated with a product to the Purchase Order at order entry. Subsequent changes to the long description made through Product Maintenance will not affect the long description as it appears on the order. However it can be modified on the order through the Detail Comments option of the Amend Item Line menu.

Print/email packaging instructions *(Only if you are printing purchase orders)* Set to print the packaging instruction entered with the supplier's product details on the purchase orders.

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System Maintenance, POP, Purchase Order Options – Email/PDF

global-dev:24 - P2 - POP System Parameters

File Run Settings Options Help

Command N/A N/A Next Home Clear Enquire Delete Insert Abort Move Help

Purchase Order Options - Email/PDF for Company A1

Details
 These settings are used to specify that for selected supplier accounts P.O.P. is to generate purchase orders as single PDF documents and deliver them via email. They are also used to configure the document 'backdrop' used when purchase orders are delivered via email or printed in PDF format. For further information please see technical note IN343.

Settings
 Allow purchase orders to be delivered via email?

Contact Details
 Include contact information in email text?

Contact name: Edward Jones
 Contact position: Purchase Order Clerk
 Contact telephone number: 01234 555 669
 Contact mobile number: 07478995555
 Contact fax number: 01234 555 670

Purchase Order Backdrop
 Backdrop for purchase orders: POP_order.jpg
 Backdrop origin (top left position): X axis in 1/10th mm: 56 Y axis in 1/10th mm: 75
 Backdrop width in 1/10th mm: 2970
 Backdrop length in 1/10th mm: 2100

Attachments < Back Close

Partition 2 Computer 1D 12:03:42 DCP PM520C/KM EDT NUM

This window appears when you complete your responses in the Order Printing Options window.

Purpose This window is used to specify that for selected supplier accounts Purchase Order Processing is to generate purchase orders as single PDF format documents to be delivered via email. It is also used to configure a document 'backdrop' to be used when purchase orders are printed in PDF format or delivered via email. It should be noted that great care must be taken when completing the settings in this window. For further information please see Technical Note IN343.

Note Printing purchase orders in PDF format and the delivery of purchase orders via email requires an up-to-date copy of PDF_In_The_Box or All_In_The_Box to be present on each GX client used to perform the purchase order generation.

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The prompts are:

Allow purchase orders to be delivered via email?

Set this if Purchase Order Processing is to generate purchase orders as individual PDF format documents and deliver them via email for selected supplier accounts. The supplier account options used to control purchase order delivery via email are found in Supplier Maintenance/Companies Details). If this option is not set, the remaining prompts in this window with the exception of the backdrop settings are skipped and the 'Attachments' button (see below for details) is disabled.

When the email is created the subject is automatically set to "xxxxxxx from ccccccccccccccccccccccccccccccccccc" where 'xxxxxxx' is the purchase order number and 'cccccccccccccccccccccccccccccccccc' is the company name. The text of the email is set to "Please find attached purchase order nnnnnnnn" where 'xxxxxxx' is the purchase order number..

Include contact information in email text?

Set this to include the text 'Regards' followed by the contact details specified below.

Example

Regards
Mr Fred Bloggs
Purchase Order Clerk
Tel: (01234) 123412
Mobile: 07712345678
Fax : (01234) 123413

Contact name

(Only if including contact information in the email text). Enter the contact name to be included in the email text.

Contact position

(Only if including contact information in the email text). Enter the contact's position to be included in the email text. This can be left blank if the contact's position is not required within the email text.

Contact telephone number

(Only if including contact information in the email text). Enter the contact telephone number to be included in the email text. This can be left blank if the contact's telephone number is not required within the email text.

Contact mobile number

(Only if including contact information in the email text). Enter the contact mobile telephone number to be included in the email text. This can be left blank if the contact's mobile number is not required within the email text.

Contact fax number

(Only if including contact information in the email text). Enter the contact fax number to be included in the email text. This can be left blank if the contact's fax number is not required within the email text.

Backdrop for purchase orders

The backdrop to be used when purchase orders are printed in PDF format or emailed. This should be set to the filename of the backdrop image excluding its "Image folder".

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Note for system administrators

The backdrop image file must be copied to a fixed sub-folder (named “global3000”) within the server image folder. The server image folder is a sub-folder within the current Global folder and by default is named “PFPrintImages”.

For example, if the backdrop image file above is named ‘POP_order.jpg’ and GSM is installed in folder C:\GSM, the backdrop image file must be copied to

C:\GSM\PFPrintImages\global3000\POP_order.jpg

It should be noted that the server image folder name can be overridden by the following registry setting:

HKEY_LOCAL_MACHINE\Software\Global\Client\Customisations\PF PrintImagesFolder

Backdrop origin (top left position) – X axis (vertical) in 1/10th mm

This provides the X axis (vertical) position of the backdrop origin (i.e. top left-hand pixel position at which the image is to be printed). The origin allows the backdrop to be positioned at a specific location on the page, which can be critical for form-print applications, and is useful to centre small images like watermarks. This should be entered in 1/10th mm (i.e. multiply the position in mm by a scaling factor of 10).

Backdrop origin (top left position) – Y axis (horizontal) in 1/10th mm

This provides the Y axis (horizontal) position of the backdrop origin (i.e. top left-hand pixel position at which the image is to be printed). The origin allows the backdrop to be positioned at a specific location on the page, which can be critical for form-print applications, and is useful to centre small images like watermarks. This should be entered in 1/10th mm (i.e. multiply the position in mm by a scaling factor of 10).

Backdrop width in 1/10th mm

The width of the backdrop in 1/10th mm (i.e. multiply the width in mm by a scaling factor of 10).

Backdrop depth in 1/10th mm

The depth of the backdrop in 1/10th mm (i.e. multiply the depth in mm by a scaling factor of 10).

Buttons:

Attachments

This enables attachment files (for example marketing material, terms and conditions etc) to be specified. The attachment files are attached to every purchase order delivered via email.

<Back

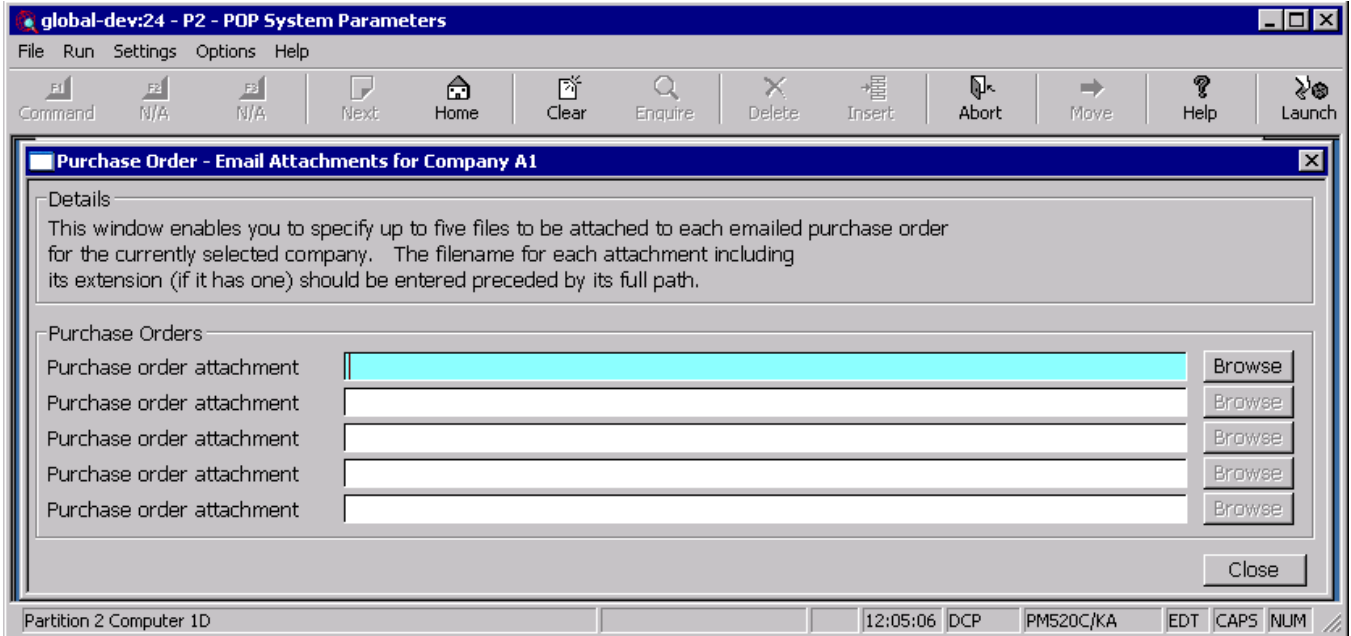
This returns to the System Maintenance/POP Parameters/Order Printing Options window without saving the settings.

Close

This saves the settings and returns to the System Maintenance/POP Parameters menu.

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System Maintenance, POP, Order Printing Options - Email Attachments



Purpose This window enables you to specify up to five files to be attached to each emailed purchase order for the currently selected company.

The prompts are:

Purchase order attachment Enter details of the files to be attached to the each purchase order delivered via email. The file name for the attachment including its extension (if it has one) should be entered preceded by its full path.

Note Care must be taken when setting up attachment details especially regarding the path. In cases where the attachment files are not stored on the operators desktop PC the full network path must be used.

Example \\server_name\documents\sales\leaflet001.pdf

Note The <Browse> buttons can be used to locate and specify attachment files.

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Supplier Maintenance – Company Details

global-dev:24 - P2 - Supplier Maintenance

File Run Settings Options Help

Command N/A N/A Next Home Clear Enquire Delete Insert Abort Move He

Company Details for ANT015 (Antec (UK) Ltd)

Co	Name	Credit Limit (GBP)	Payment Method	Auto-payment?
A1	Standext Systems Ltd	0	C	Y

Account Details
 Trading terms: 3M Due 90 Days
 Key supplier?
 Held?

Agency Details
 Paid via an agency
 Agent
 Agency reference

General Ledger
 Default profit centre: [] Default account: []
 Control profit centre: [] Control account: []
 Autopost profit centre modifier: [] Autopost account modifier: []

Purchase Details
 Price list: []
 Allow foreign currency purchase orders?
 Email purchase orders?
 Email: dan@global3000.co.uk

Search Details Amend Apply Close
 Currencies Bank Details

Partition 2 Computer 1D 12:07:08 DCP CL410Y/W6 DSP CAPS NUM

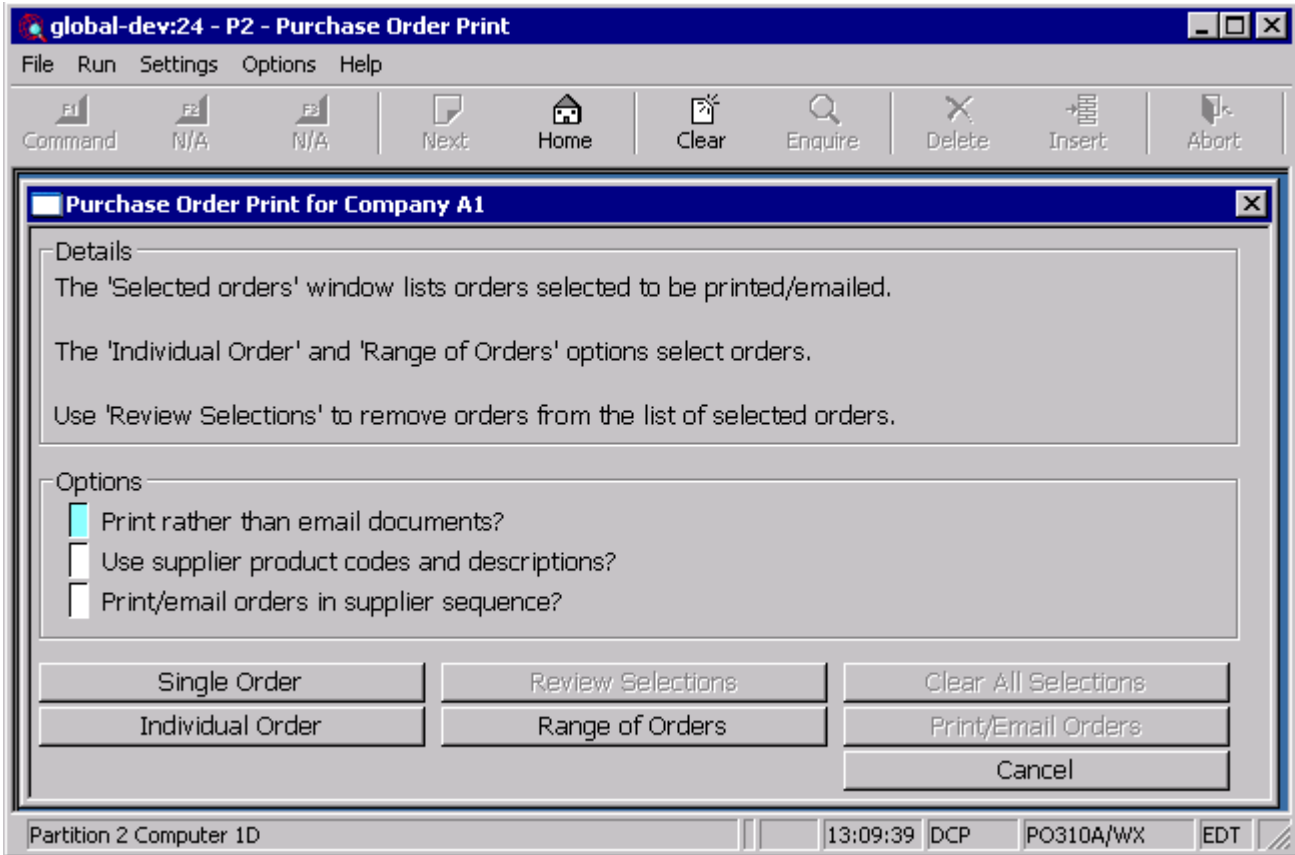
Email purchase orders? (Only if email delivery of purchase orders is allowed). Set this if purchase orders are to be delivered via email (rather than printed) for this supplier.

Note Purchase orders are not emailed if the option to export purchase orders via E.D.I. is selected for this supplier.

Email (Only if emailing purchase orders). Enter the email address to which purchase orders are to be sent. A look-up of existing contact records (containing an email address) for the supplier is available.

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Purchase Order Print



Introduction This program enables you to print/email or reprint/resend one or a range of purchase orders.

If Global 3000 EDI is in use, this program enables you to export all or selected purchase orders via EDI instead of, or in addition to, printing/emailing them.

Note Throughout the documentation for purchase order print the term 'export' refers to the export of purchase orders via Global 3000 EDI.

When Landed Costs is in use, if the from-supplier is different to the supplier, the from-supplier's reference and name is included in the footer of the purchase order.

Note This option is not available if the 'Print/email purchase orders' system parameter is not set.

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EDI export If Global 3000 EDI is in use, this program automatically exports purchase orders for all suppliers:

- For whom the 'Export purchase orders' indicator is set to Yes or Both in Supplier Details in Creditors Ledger.
- For whom the 'Export purchase orders' indicator is blank, when the 'Export purchase orders' EDI system parameter is set to Yes or Both.

When the setting of the relevant indicator is Yes, purchase orders are just exported via EDI. When the setting is Both, they are both exported and printed/mailed.

Exporting purchase orders via Global 3000 EDI involves two steps:

- Exporting the purchase orders from POP to EDI by running the Purchase Order Print option.
- Exporting the details from EDI via one of the export options within EDI. For full details of these options, see the Global 3000 EDI Manual.

Note You cannot print/email or export purchase orders which have been imported via EDI or Data Conversion with an EDI error status.

The prompts are:

Print rather than email documents *(Only available when email delivery of purchase orders is allowed)* Set this to physically print rather than email the selected purchase orders for suppliers configured to receive purchase orders via email.

Use supplier produce codes and descriptions Set this to print/email/export the supplier product codes and descriptions entered in Supplier/Product Maintenance instead of the standard product codes and descriptions. If any supplier product codes or descriptions are blank, the standard ones are printed/mailed/exported. If this is not set, the standard product codes and descriptions entered through Product Maintenance are printed/mailed/exported. This will include any modifications you made to the standard description specifically for an order in the Order Item Lines Window. The default for this item is the setting used the last time purchase orders were printed/mailed/exported.

Note When exporting purchase orders via EDI, the EDI translation table feature can be used to substitute suppliers' codes for your internal ones. For further details, see the Global 3000 EDI Manual.

Print/email orders in supplier sequence Set this to print/email/export the selected orders in supplier sequence, if this is not set the orders are printed/mailed/exported in the sequence in which they were selected.

Buttons:

Single order Select this to print/email/export a single purchase order.

Review selections *(Only available once one or more orders have been selected)* Select this to enter the 'Selected Orders' window and review the currently selected orders.

Print/Email Orders *(Only available once one or more orders have been selected)* Select this to proceed with printing/mailing/exporting all currently selected orders.

Individual order Select this to add an individual order to the list of orders selected to be printed/mailed/exported.

Range of orders Select this to add a range of orders to the list of orders selected to be printed/mailed/exported.

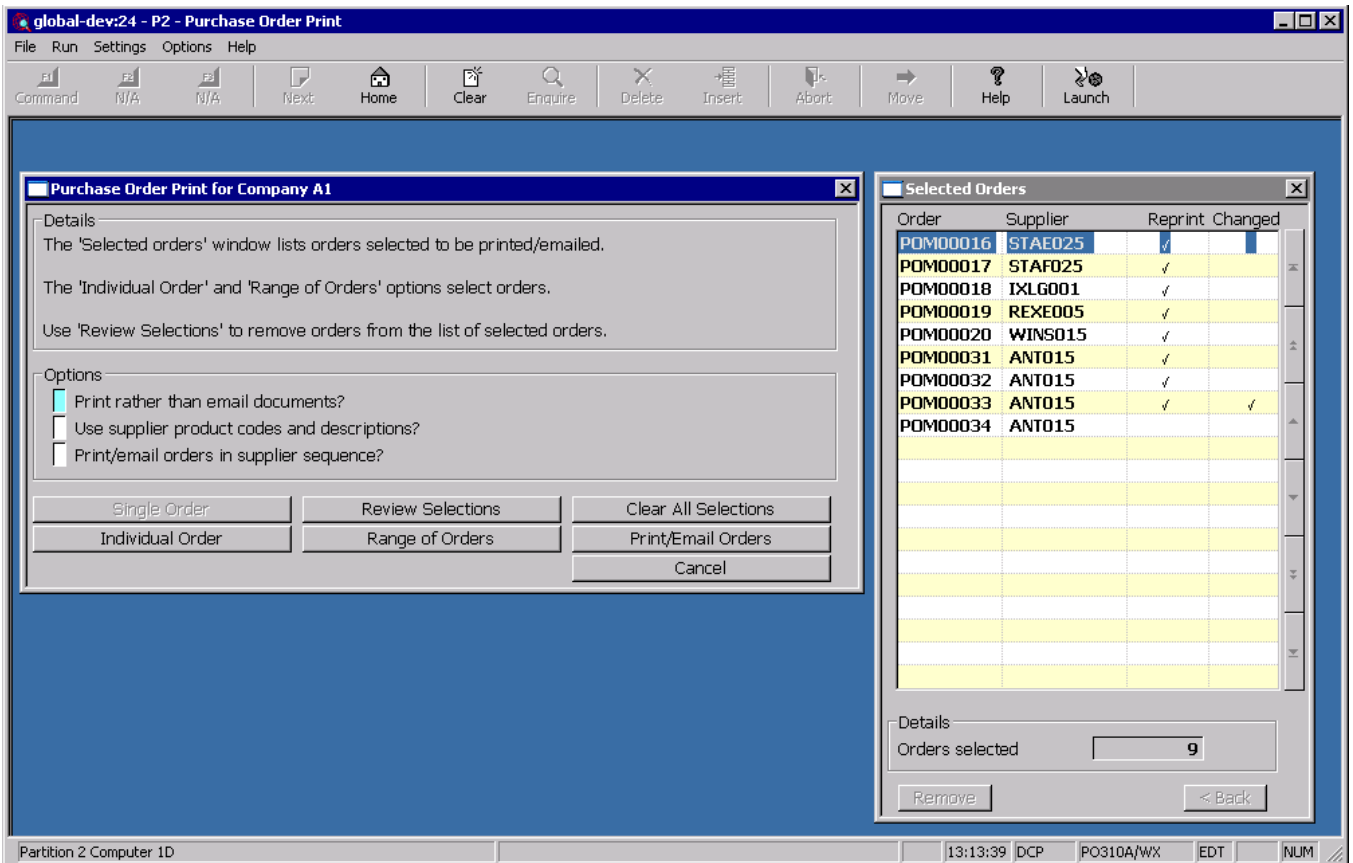
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Note Once one or more purchase orders have been selected the 'Selected Orders' window is displayed (and remains onscreen) which lists the purchase orders currently selected to be printed/emailed/exported.

Clear all selections (Only available once one or more orders have been selected) Select this to deselect all purchase orders currently selected to be printed/emailed/exported.

Cancel Select this to exit the program, selected orders are not printed/emailed/exported.

Selected Orders



Purpose This window enables you to view the orders selected to be printed/emailed/exported.

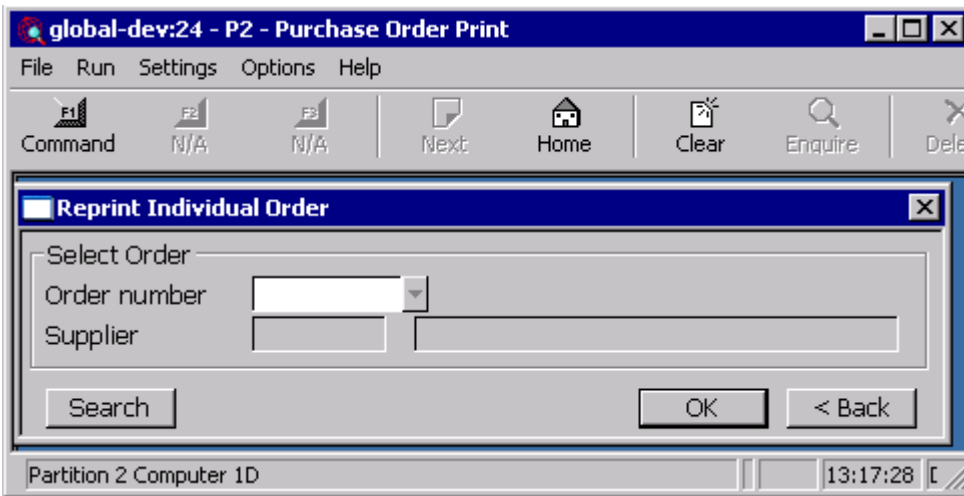
Note This window is displayed once at least one order has been selected for printing/emailing/exporting. It remains on screen until the 'Print/Email Orders' option is chosen.

Button:

Remove (Only available when the 'Review selections' button (in the Purchase Order Print window) is pressed) Select this to remove the currently high-lighted order from the list of orders to be printed/emailed/exported.

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Individual Order



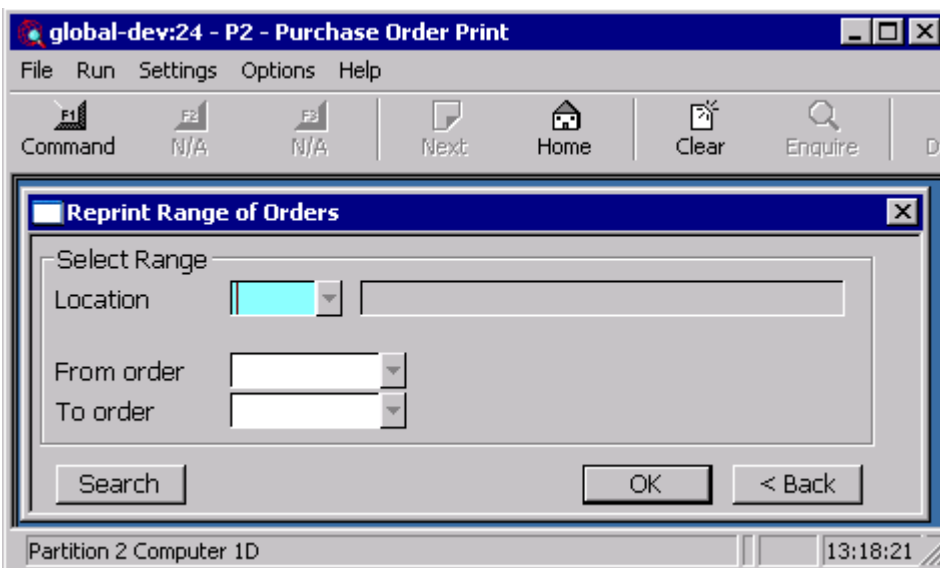
Purpose This window enables you to specify an individual order to be added to the list of orders selected to be printed/emailed/exported.

Note Before this window is displayed you are first asked to specify whether you wish to select a new order or reprint/resend an order that has previously been printed/emailed/exported.

The prompt is:

Order number Enter the order number you want to print/email/export. A search is available.

Range of Orders



Purpose This window enables you to specify a range of orders to be added to the list of orders selected to be printed/emailed/exported.

Note Before this window is displayed you are first asked to specify whether you wish to select new orders or reprint/resend orders that have previously been

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printed/mailed/exported.

The prompts are:

- Location** (Multi-location systems only) If you want to restrict range of orders to those from a single location, enter its code here. Or leave blank for all locations. A search is available.
- From order** Enter the number of the first purchase order you want to select for printing/emailing/exporting. Leave blank for the first order on file. A search is available.
- To order** Enter the number of the last purchase order you want to select for printing/emailing/exporting. Leave blank for the last order on file. A search is available.

Standard Backdrop

A standard backdrop is available for purchase orders, to use the standard backdrop the following settings must be made within System Maintenance, POP, Order Printing Options – Email/PDF.

The backdrop can be downloaded from http://www.global3000.co.uk/pub/global3000/6.0/pop_order.zip

Backdrop for purchase orders	POP_order.jpg
Backdrop origin (top left position) – X axis (vertical) in 1/10th mm	56
Backdrop origin (top left position) – Y axis (horizontal) in 1/10th mm	75
Backdrop width in 1/10th mm	2970
Backdrop depth in 1/10th mm	2100

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