



Global 3000 Service Pack Note

SOP PDF Format Pro-Forma Invoices

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INTRODUCTION

This service pack provides the ability to specify a specific back drop for use when pro-forma invoices are generated in PDF format.

It is now possible to specify the backdrop (at system level) to be used when pro-forma invoices are generated in PDF format. Default backdrops (in landscape format) for pro-forma invoices (in both single and triple column format) have been created and are available for download from http://www.global3000.co.uk/pub/global3000/6.0/sop_backdrops.zip

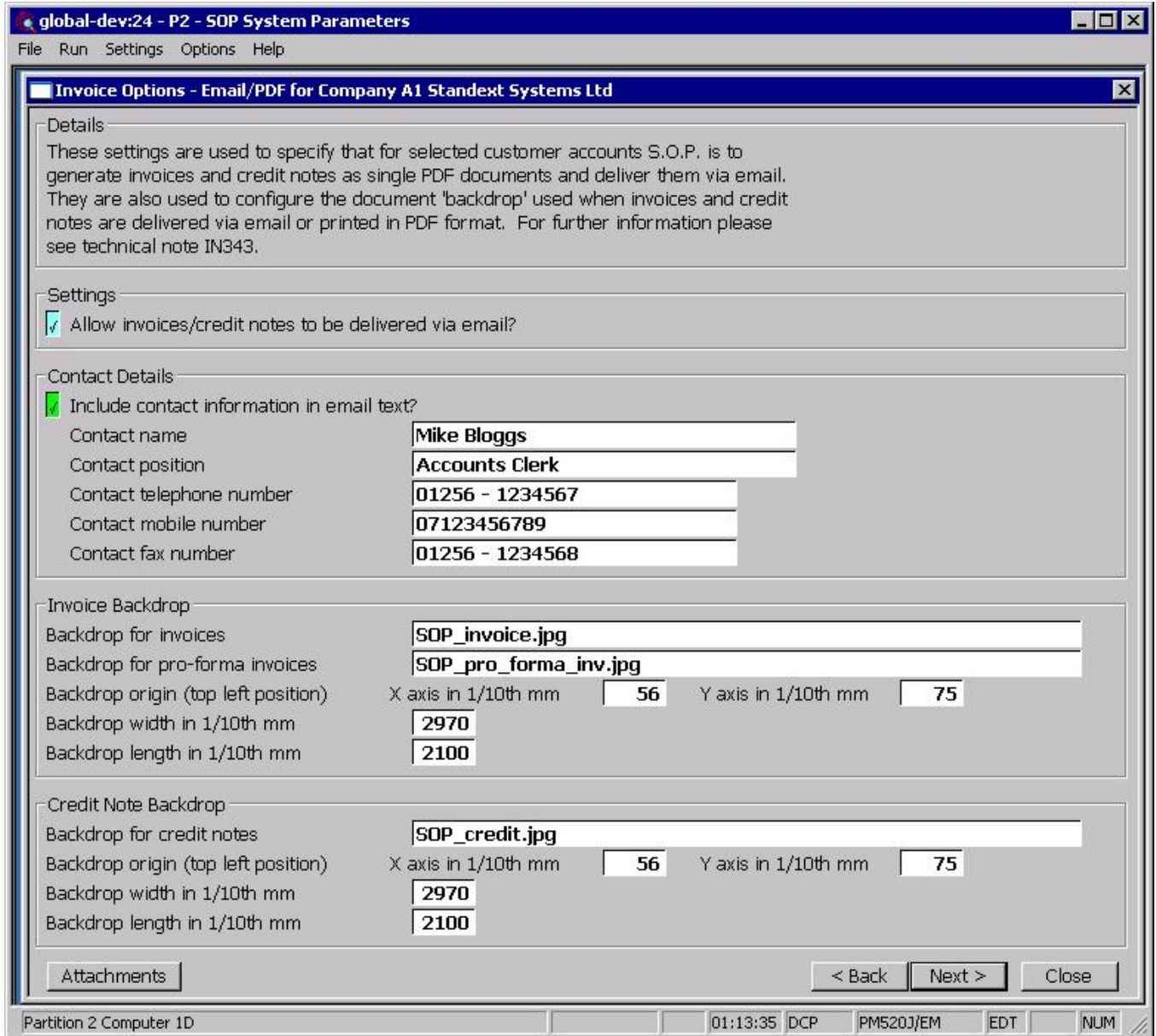
Please note, Pro-Forma Invoices cannot be delivered via email.

The generation of PDF format pro-forma invoices requires an up-to-date copy of either PDF_In_The_Box.dll or All_In_The_Box.dll to be present on each GX client used to perform the document generation.

Technical Note: The Extended PF facility is used to generate documents in PDF format. For full details of the Extended PF facility please refer to Technical Note IN343.

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System Maintenance, SOP, Invoice Options – PDF/Email



This window appears when you complete your responses in the Invoice Options – Sales Analysis window.

Purpose This window is used to specify that for selected customer accounts S.O.P. is to generate invoices and credit notes as single PDF format documents to be delivered via email. It is also used to configure a document ‘backdrop’ to be used when Invoices, Pro-Forma Invoices and Credit Notes are delivered via email or printed in PDF format. 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 invoices, pro-forma invoices and credit notes in PDF format and the delivery of invoices/credit notes via email requires an up-to-date copy of PDF_In_The_Box.dll or All_In_The_Box.dll to be present on each GX client used to**

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perform the invoice generation.

The prompts are:

Allow invoices/credit notes to be delivered via email?

Set this if S.O.P. is to generate invoices and credit notes as individual PDF format documents and deliver them via email for selected customer accounts. The customer account option used to control invoice/credit note delivery via email are found in Customer Maintenance/Companies/SOP 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 “Invoice xxxxxxxx from cccccccccccccccccccccccccccccc” where ‘xxxxxxx’ is the invoice number and ‘ccccccccccccccccccccccccccccc’ is the company name. The text of the email is set to “Please find attached invoice xxxxxxxx” where ‘xxxxxxx’ is the invoice number. For credit notes the word ‘Invoice’ is replaced with ‘Credit Note’.

To allow emailed invoices and credit notes to be physically printed an option is provided within invoice and credit note print. The option is only available when reprinting invoices and credit notes, when set all invoices and credit notes selected for reprinting are physically printed regardless of the customers account configuration.

Note Pro-forma invoices are not delivered via email.

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
Invoice 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 Invoices The backdrop to be used when invoices are emailed or printed in PDF format. This should be set to the filename of the backdrop image excluding its “Image folder”.

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Backdrop for pro-forma invoices

The backdrop to be used when pro-forma invoices are printed in PDF format. This should be set to the filename of the backdrop image excluding its “Image folder”.

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 ‘SOP_invoice.jpg’ and GSM is installed in folder C:\GSM, the backdrop image file must be copied to

C:\GSM\PFPrintImages\global3000\SOP_invoice.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).

Note

The above four settings apply to both the backdrop for invoices and the backdrop for pro-forma invoices.

Backdrop for Credit notes

The backdrop to be used when credit notes are emailed or printed in PDF format. This should be set to the filename of the backdrop image excluding its “Image folder”.

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 ‘SOP_credit.jpg’ and GSM is installed in folder C:\GSM, the backdrop image file must be copied to

C:\GSM\PFPrintImages\global3000\SOP_credit.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

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- 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 sales literature, terms and conditions etc) to be specified. The attachment files are attached to every invoice or credit note delivered via email.
- <Back** This returns to the System Maintenance/S.O.P. Parameters/Invoicing/Invoice Options – Sales Analysis window without saving the settings.
- Close** This saves the settings and returns to the System Maintenance/S.O.P. Parameters menu.

Standard Backdrops

There are two additional standard backdrops, to use the standard backdrops the following settings must be made within System Maintenance, SOP, Invoice Options – Email/PDF.

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

For pro-forma invoices with ‘To follow’ items printed (triple column format) the following settings are required.

- Backdrop for pro-forma invoices** SOP_pro_forma_inv.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

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**Backdrop depth in
1/10th mm** 2100

For pro-forma invoices without 'To follow' items printed (single column format) the following settings are required.

**Backdrop for
quotations** SOP_single_col_pro_forma_inv.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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