Global 3000
Service Pack Note

SOP Transaction Notes

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Project	ZS60_000220.doc	
Version	1.0	1 of 11

INTRODUCTION

This service pack provides the ability to record notes for SOP transactions.

NOTE: SOP Transaction notes are only available at sites configured to use the extension database.

The changes are:

- Sales order entry and the SOP transaction desktop now include a new button labelled "Notes" (available from the header details windows), when pressed free format transaction notes can be viewed and updated. An indicator shows when a transaction has notes.

- The standard SOP search to include a new button labelled "Notes", when pressed SOP transaction notes can be viewed and updated. An indicator shows when a transaction has notes.

- SOP enquiries have been extended to include a new button labelled "Notes", when pressed transaction notes can be viewed and updated. An indicator shows when a transaction has notes.

- Sales Order Reporting (Report Options) has been extended to include a new option labelled 'Include transaction notes?'. When set transaction notes are included on the report.

- Sales order entry and the SOP transaction desktop now include the option of copying transaction notes when a transaction is copied.

Please note, transaction notes can be entered for SOP orders and quotations, SOP credit notes and directly entered SOP invoices. They cannot be entered for repeating sales orders.

DOCUMENTATION CHANGES

Sales Order Entry - Sales Order Header Details

Notes	*(Only available at sites configured to use the extension database, not available when entering repeating orders)* This allows the notes for the current transaction to be viewed and updated. If the current transaction already has notes an indicator (the hi-lighted text 'Notes') is displayed to show this.

Transaction Desktop - Transaction Details

Notes *(Only available at sites configured to use the extension database, not available when entering repeating orders)* This allows the notes for the current transaction to be viewed and updated. If the current transaction already has notes an indicator (the hi-lighted text 'Notes') is displayed to show this.

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Sales Orders (transaction selection)

Notes *(Only available at sites configured to use the extension database, not available for repeating orders)* This allows the notes for the current transaction to be viewed and updated. If the current transaction already has notes an indicator (the hi-lighted text 'Notes') is displayed to show this.

SOP Enquiries

Notes *(Only available at sites configured to use the extension database, not available for repeating orders)* This allows the notes for the current transaction to be viewed and updated. If the current transaction already has notes an indicator (the hi-lighted text 'Notes') is displayed to show this.

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SOP Enquiries – Header Details

Notes   *(Only available at sites configured to use the extension database, not available for repeating orders)* This allows the notes for the current transaction to be viewed and updated. If the current transaction already has notes an indicator (the hi-lighted text 'Notes') is displayed to show this.

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SOP Reporting – Report Options
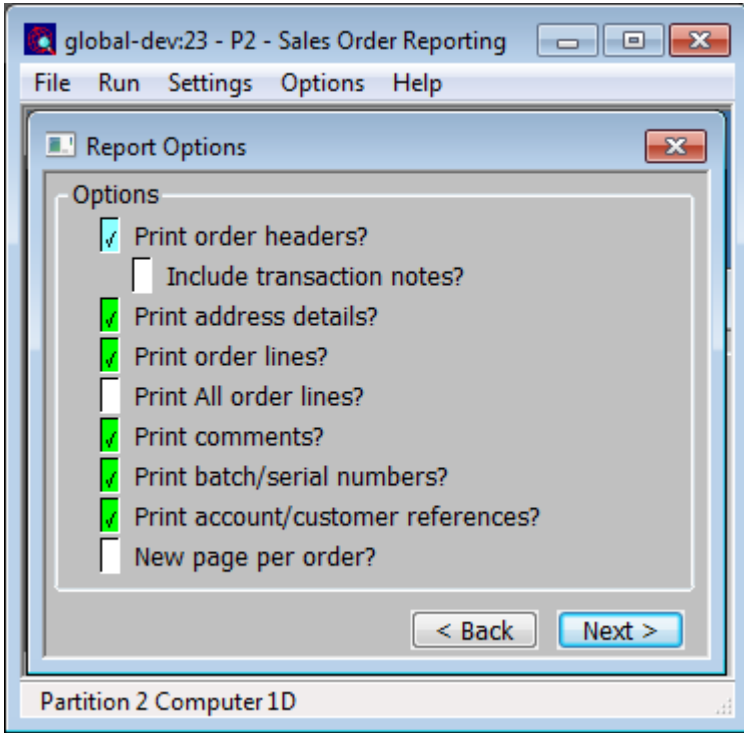
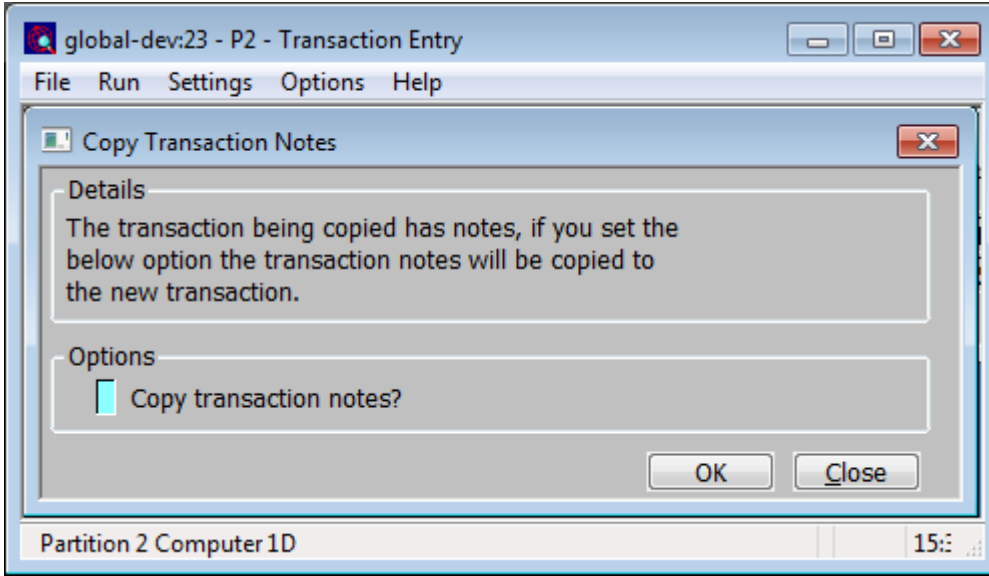| Include transaction notes	*(Only available at sites configured to use the extension database and if header details are included on the report)* When set transaction notes (for those transactions that have notes) are included as each transaction is printed.

Transaction Desktop – Copy Transaction

Copy transaction notes?	*(Only available at sites configured to use the extension database, not available when copying from or to a repeating order)* When set any transaction notes entered for the transaction being copied are copied to the new transaction.

Sales Order Entry – Copy Transaction Notes Window

This window appears after selecting a transaction to be copied in Sales Order Entry that has transaction notes.

Purpose This window enables you choose whether or not transaction notes are copied to the new transaction.

Copy transaction notes? *(Only available at sites configured to use the extension database, not available when copying from or to a repeating order)* When set any transaction notes entered for the transaction being copied are copied to the new transaction.

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Notes Window
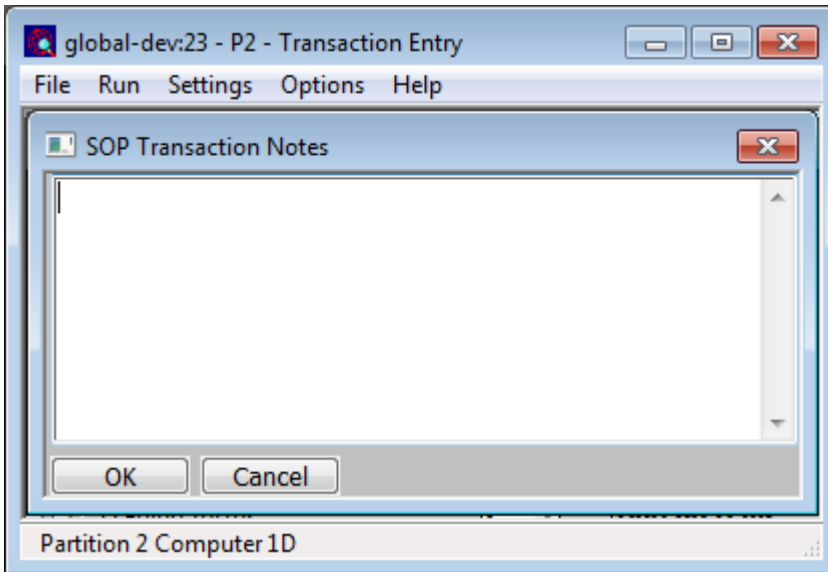
This window appears when you press the notes button at various points within the Global 3000 applications.

Purpose   This window enables you to view and record free-form notes for each of the following items.

- Debtors Ledger transactions.

- Creditors Ledger transactions.

- Products.

- SOP Transactions (excluding repeating orders).

Note   Notes for the items listed above are only available at sites configured to use the extension database.

Notes are displayed and updated via a standard Windows text edit control. This allows up to 32,500 characters of free format notes to be maintained. This format of note entry supports standard Windows functions such as word wrap and cut and paste.