



# Global 3000 Service Pack Note SOP Transaction Notes

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<b>Project</b>	ZS60_000220.doc		
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## 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.

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## DOCUMENTATION CHANGES

### Sales Order Entry - Sales Order Header Details

The screenshot displays the 'Sales Order Header Details' window. The 'Details' section includes the following fields and values:

- Customer Ref: **ORD00087** (highlighted in cyan)
- Delivery: VAN
- Instructions: Van
- Order date & time: 30/10/2012 17.07
- Expiry date: (empty)
- Main price list: MAINGBP
- Special price list: (empty)
- Trade disc scheme: FILE (Filing)
- Trade disc level: 1
- Negotiated disc%: 0.00
- Sales Rep.: AJ
- Terms code: C
- Class: WS
- Date Required: (empty)
- Payment method: Normal
- Cross-border cash book: (empty)
- Deliver from: STH
- Analyse to: STH
- Territory: M03
- Number of delivery labels: 0
- Despatch/Return date: 30/04/2005
- Acknowledgements required?
- Part invoicing allowed?
- Part deliveries allowed?
- Combine orders for delivery?
- Combine invoices?
- Back orders?: Allowed

The 'Notes' field is highlighted in green. The status bar at the bottom shows: Partition 2 Computer 1D | 14:24:01 DCP | SO100H/XH | EDT | NUM

**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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# Transaction Desktop - Transaction Details

The screenshot shows a software window titled "global-dev:23 - P2 - Transaction Entry" with a menu bar (File, Run, Settings, Options, Help). The main area is titled "Transaction Details" and contains the following sections:

- Details:** Customer reference (ORD00099), Required (empty), Transaction date (30/10/2012), Expiry date (quotations) (empty), Cross-border cash book (empty), Trading terms (C, Due 90 Days). On the right, Created by (DCP), Last amended by (DCP), Generated from (ORD00091), and a green "Notes" button.
- Sales Details:** Sales office (MID, Midlands and Wales), Sales Rep. (AJ, Alan Jones), Territory (M03, Midlands - West & Wales), Class (WS, Wholesaler).
- Despatch Details:** Despatch from (MID, Midlands and Wales), Delivery (VAN), Instructions (Van), Number of labels (0), Despatch/Return date (30/04/2005).
- Settings:** Acknowledgements required? (unchecked), Part invoicing allowed? (checked), Part deliveries allowed? (checked), Combine orders for delivery? (unchecked), Combine invoices? (unchecked), Back orders? (Allowed).

Buttons at the bottom include Search, Price/Discount, Notes, Credit Note Options, Initial Comments, Repeating Order, Trailer Comments, OK, and Close. The status bar at the bottom shows "Partition 2 Computer 1D", "15:23:04 DCP", "SO900X/XH", "EDT", and "NUM".

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## Sales Orders (transaction selection)

Order No	Account	Date	Status	Type	Customer ref	Rep.	Locn
ORD00079	FUTU005	25/02/2005	Archive	Normal	FUT/2438	HS	NTH
ORD00080	ANDE001	03/03/2005	Open	Normal	ande094	JW	MID
ORD00081	BROW0...	03/03/2005	Open	Normal	brow/439	AG	MID
ORD00082	GILE001	03/03/2005	Open	Normal	gile/3987	PD	MID
ORD00083	NEAL015	03/03/2005	Open	Normal	neal2498u	JW	STH
ORD00085	WATSO...	28/03/2005	Open	Normal	ORD00085 - TEST BINS	AJ	MID
ORD00086	WATSO...	30/04/2005	Open	Normal	ORD00086 - TEST BINS	AJ	STH
ORD00087	WATSO...	30/04/2005	Open	Normal	ORD00087	AJ	STH
ORD00088	WATSO...	30/04/2005	Open	Normal	ORD00088	AJ	MID
ORD00089	WATKO...	30/04/2005	Open	Normal	ORD00089	HS	MID
ORD00090	WATSO...	30/04/2005	Open	Normal	ORD00090 - SUGGESTED TEST	AJ	MID
ORD00091	WATSO...	30/04/2005	Open	Normal	ORD00091 - SUG TEST 2	AJ	MID

Details

Name:  Time:  Outstanding:

Buttons: Interrupt, Status, Notes, Find, Select, Cancel

Status bar: Partition 2 Computer 1D | 14:22:44 DCP | SO100C/QN | DSP | NUM

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# SOP Enquiries

Order	Type	Order Reference	Account	Status	Locn	Date	Time	Required
ORD00099	Order	ORD00099	WATS0...	Open	MID	30/10/2012	13.15	Notes
ORD00097	Order	ORD00097	WATS0...	Open	MID	30/04/2005	12.25	Notes
ORD00096	Order	ORD00096	WATS0...	Open	MID	30/04/2005	12.22	Notes
ORD00095	Order	ORD00091 - SUG TEST 2	WATS0...	Open	MID	30/04/2005	12.21	Notes
ORD00091	Order	ORD00091 - SUG TEST 2	WATS0...	Open	MID	30/04/2005	15.10	Notes
ORD00090	Order	ORD00090 - SUGGESTED TEST	WATS0...	Open	MID	30/04/2005	13.45	
ORD00089	Order	ORD00089	WATK0...	Open	MID	30/04/2005	10.05	Notes
ORD00088	Order	ORD00088	WATS0...	Open	MID	30/04/2005	10.04	
ORD00087	Order	ORD00087	WATS0...	Open	STH	30/10/2012	17.07	Notes
ORD00086	Order	ORD00086 - TEST BINS	WATS0...	Open	STH	30/04/2005	14.59	
ORD00085	Order	ORD00085 - TEST BINS	WATS0...	Open	MID	28/03/2005	14.55	
ORD00083	Order	neal2498u	NEAL015	Open	STH	03/03/2005	14.23	

Order Details

Analysis location: MID    Sales representative: AJ    Main price list: MAINGBP  
 Created by: DCP    Area code: M03    Special price list:   
 Last amended by: DCP    Trade discount level: 1  
 Sales Analysis type:   
 Buttons: Header Details, Invoice Address, Delivery Details, Initial Comments, Close, Order Details, Delivery Address, Delivery Notes, Final Comments, Exclude Quotes, Reprint Invoice, Notes

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## SOP Enquiries – Header Details

global-dev:23 - P2 - Sales Enquiries

File Run Settings Options Help

Header Details

Details

Number	ORD00099	Account	WATSO...	Created	30/10/2012	13.15
Type	Order	Sales location	MID	Created by	DCP	
Reference	ORD00099	Despatch location	MID	Expiry date		
Status	Open	Original order	ORD00091	Last amended by	DCP	
<b>Notes</b>						

Pricing

Main price list	MAINGBP	Negotiated discount	0.00 %	Terms code	C
Special price list		VAT status	Normal	Day of month	0
Trade discount level	1	Payment method	Normal		

Settings

<input type="checkbox"/> Acknowledgement required?	Sales Analysis type	
<input checked="" type="checkbox"/> Valid to pick?	Sales rep.	AJ
<input checked="" type="checkbox"/> Valid to invoice?	Area code	M03
<input checked="" type="checkbox"/> Allow part delivery?	Customer class	WS
<input checked="" type="checkbox"/> Allow part invoicing?	Repeat interval	1
Back orders? Allowed	Number of repeats	1
	Status of goods	

Totals

Outstanding	19.50	GBP
Invoiced	0.00	GBP
Total value	19.50	GBP
Delivery labels	0	
Gross weight	10.00	
Total cost	10.00	GBP

Notes

Close

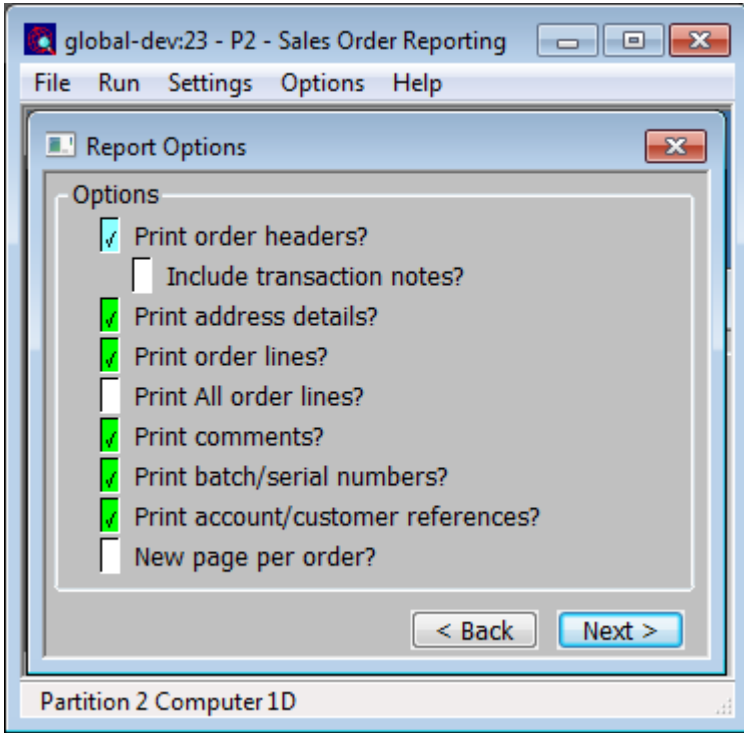
Partition 2 Computer1D 15:25:07 DCP PM420B/BH EDT NUM

**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.

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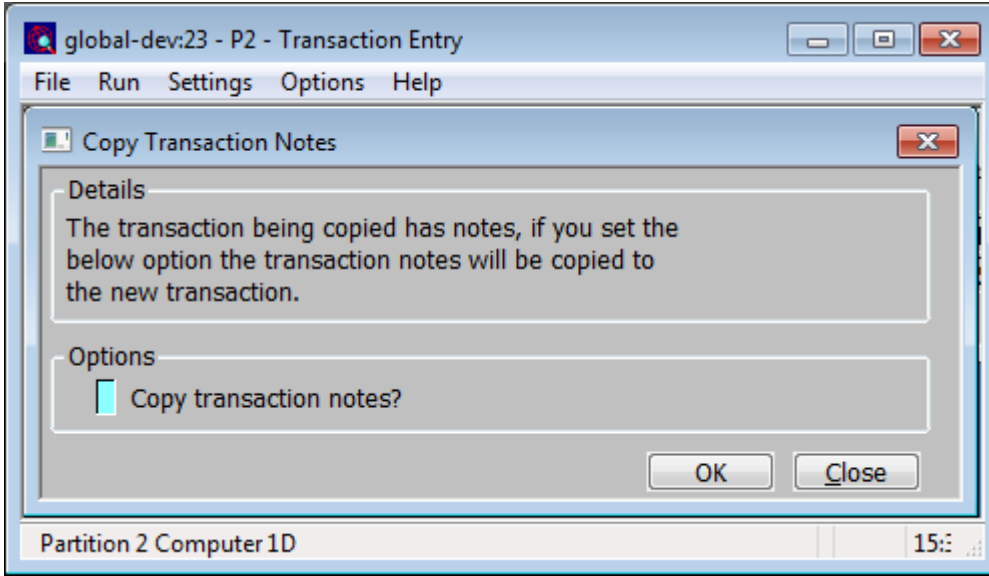


## Transaction Desktop – Copy Transaction

**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.

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## Sales Order Entry – Copy Transaction Notes Window



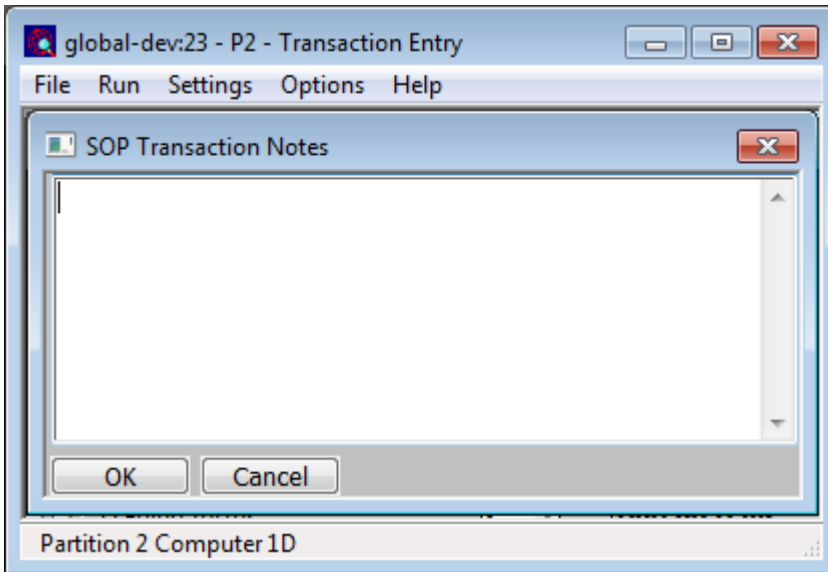
This window appears after selecting a transaction to be copied in Sales Order Entry that has transaction notes.

**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.

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