

# Global 3000 Service Pack Note

## SOP Transaction Desktop - Automatic Delivery Charges

Author	DCP	
Project	ZS60_000221.doc	
Version	1.0	1 of 7

#### INTRODUCTION

This service pack provides the ability to apply automatically calculated delivery charges based on an orders weight or value.

The changes are:

A new function named 'Delivery Charges' has been added to the SOP System Maintenance menu. The new option allows the user to define a table consisting of up to ten levels of transaction weight or transaction value and the delivery charge associated with each level. It also allows the product to be used as the automatic delivery charge to be defined. A fixed delivery charge value can be specified for transactions where the delivery address is overseas.

When the addition of a SOP transaction is completed, the SOP Transaction Desktop checks to see if the system has been configured with a table of delivery charges; if it has it will calculate the delivery charge based on the transactions weight or its value and add a line for the delivery charge product with the correct value.

When amendments to an existing transaction are completed, the SOP Transaction Desktop checks to see if an automatically calculated delivery charge has already been applied to the transaction (and has not been manually deleted); if one has then its value is recalculated.

Notes:

- The product used for automatically added delivery charges must be type extra, other types of product including percentage extras cannot be used.
- If delivery charges are calculated based on transaction value, an option exists to determine whether the value after discount (but excluding tax) or the gross value should be used to determine the delivery charge value.
- The calculation and addition of automatic delivery charges does not apply to repeating orders, credit notes or directly entered invoices. Repetitions of repeating orders will have the delivery charge applied as they are generated.
- Automatic delivery charges are only calculated, recalculated and applied to transactions processed via the SOP transaction desktop and not those processed via sales order entry.
- Transaction lines for automatic delivery charges are display only and cannot be amended. They are not copied if the transaction is copied.
- For foreign currency transactions (that are not delivered overseas), the delivery charge is converted to the transaction currency using the house exchange rate enforce on the transaction date.
- Automatic delivery charges are exempt from pricing and discount calculations, if a price list entry exists for the product used as an automatically added delivery charge then it is ignored unless a line for the product is manually added.
- When the transaction desktop calculates or recalculates an automatic delivery charge it is displayed on screen, depending on an authorisation point ('SO\_DEL\_CHG') the operator may or may not manually change its value.

Author	DCP	
Project	ZS60_000221.doc	
Version	1.0	2 of 7

#### **DOCUMENTATION CHANGES**

## **SOP Transaction Desktop Window**

global-dev:23 - P2 - Tr File Run Settings O	ansaction Entry ptions Help							
Transaction Desktop								×
Transaction Details       Account     WATS0       Type     Sales 0       Our ref     ORD00       Date     30/06       Required     Image: Content of the second	) • Drder • 1093 • /2005	Customer Address Postcode Status Customer ref Trading terms	Watsons Plc Hereford HR1 1EG Overdue ORD00093 C Due 90	Phone <b>014</b> Curri Days	32 452351 ency	Net Value VAT GBP Gross Profit Weight		312.00 304.59 53.30 357.89 62.25 % 6.00
Product	Description			Quantity	Unit	Price	Per	Net
GAL01 GAL02 GAL03 P&P	Galaxy Highli Galaxy Highli Galaxy Highli Postage and	ghter - Yellow ghter - Blue ghter - Green Packing		100 100 100		0.99 0.99 0.99 15.00	ITEM ITEM ITEM	\$ 99.00 99.00 99.00 \$ 15.00 \$
Line Quantities Free stock Allocated Delivered Back ordered Forward ordered On order		Line Values Line price Discount Line value Cost Profit		15.00 0.00 % 15.00 1.00 999.99 %	Line Codes Required by Weight VAT code Stock locatio Origin	n From sto	<b>S</b> ⊂ck	1 1 1
Functions       Search     Se       Eind     New       Enquiry     Co	t-up Amend y A/c Templat ppy Exit	e Account Print	n Delivery Invoice Status	Payment Process Finish	Line Quantity Prices Amend	Dates	C <u>o</u> des Origin Delete	Comments Stock Confirm
Partition 2 Computer 1D						14:42:05 DCP	SO900X/TD	DSP CAPS NUM

**Note** Lines for automatically added delivery charges cannot be amended and are not copied when a transaction is copied; these are identifiable by a warning hi-lighted product code. If you delete the line for an automatically added delivery charge the Transaction Desktop will not re-apply it.

Author	DCP	
Project	ZS60_000221.doc	
Version	1.0	3 of 7

## SOP Order Entry – Detail Lines Window

💽 global-dev:23 - P2 - Transa	tion Entry			- • •
File Run Settings Option	s <u>H</u> elp			
Detail Lines				<b>—</b>
Product	Description	Required	Quantity	Unit
GAL01	Galaxy Highlighter - Yellow		10	O ITEM ≖
GAL02	Galaxy Highlighter - Blue		10	O ITEM
GAL03	Galaxy Highlighter - Green		10	О ІТЕМ 🔶
P&P	Postage and Packing			
<b>.</b>				
				<u> </u>
	Price Total Value	15.00 15.00 V C	ost	1.00
	Discount	0.00 % %		999.99
	VAT S 🗸			
			ОК	Close
Partition 2 Computer 1D		14:42:57 [	CP SO100D/DL	DSP CAPS N

**Note** Lines for automatically added delivery charges cannot be amended and are not copied when a transaction is copied; these are identifiable by a warning hi-lighted product code. If you delete the line for an automatically added delivery charge the Transaction Desktop will not re-apply it should you subsequently amend the order.

Author	DCP	
Project	ZS60_000221.doc	
Version	1.0	4 of 7

#### **Automatic Delivery Charges Window**

global-dev:23 - P2 - Delivery Charges		
Automatic Delivery Charges		
Details		
This window allows you to configure a delivery charge	product which will	
be automatically added (as a seperate line) to transact	tions via the SOP	
transaction desktop. You can define up to ten levels o	f transaction weight	
or value, each level is associated with a specific delive	ry charge value.	
The total weight or total value (either including or excl	uding tax) is	
compared with the levels (on exit from the transaction	) and the appropriate	
be amended).	line (which cannot	
· · · ·		
Settings		
Delivery charge product P&P	Postage and Packing	
Calculate delivery charge based on Iotal	transaction value including t	ax 🔹
Delivery Charges		
Weight or value up to 100.00	Delivery charge	30.00
Weight or value up to 125.00	Delivery charge	25.00
Weight or value up to 150.00	Delivery charge	20.00
Weight or value up to 999,999,999.99	Delivery charge	15.00
Weight or value up to	Delivery charge	
Weight or value up to	Delivery charge	
Weight or value up to	Delivery charge	
Weight or value up to	Delivery charge	
Weight or value up to	Delivery charge	
Weight or value up to	Delivery charge	
Delivery charge for overseas deliveries	28.75	
Search		OK Cancel
Search		
Partition 2 Computer 1D	14:44:01 DCP	SO540/W1

This window appears when you select the 'Delivery Charges' option from the SOP system maintenance menu.

- **Purpose** This window is used to configure the system to use automatic delivery charges within the SOP Transaction Desktop. You can define up to ten levels of transaction weight or value, each level is associated with a specific delivery charge value. The total weight or total value (either including or excluding tax) of each transaction is compared with the levels and the appropriate delivery charge is then applied as an extra transaction line (which cannot be amended).
  - **Note** The calculation and addition of automatic delivery charges does not apply to repeating orders, credit notes or directly entered invoices. Repetitions of repeating orders have the delivery charge applied as they are generated. Automatic delivery charges are only calculated, recalculated and applied to transactions processed via the SOP transaction desktop and not those processed via sales order entry.

The prompts are:

Author	DCP	
Project	ZS60_000221.doc	
Version	1.0	5 of 7

Delivery charge product	Enter the product (or barcode) to be used as an automatic delivery charge, this must be product type extra (not percentage extra). When this is set the SOP Transaction Desktop will calculate automatic delivery charges based on the below settings.				
Note	Automatic delivery charges are exempt from pricing and discount calculations, if a price list entry exists for the product used as an automatically added delivery charge then it is ignored unless a line for the product is manually added.				
Calculate delivery charges based on.	This controls whether overall order weight or value is used to calculate the automatic delivery charge.				
	• Total transaction value excluding tax. When this is selected the levels entered below will be compared with each transactions total value (i.e. the value after discount but excluding tax) to determine the delivery charge.				
	• Total transaction value including tax. When this is selected the levels entered below will be compared with each transactions total gross value (i.e. the value after discount and including tax) to determine the delivery charge.				
	• Total transaction weight. When this is selected the levels entered below will be compared with each transactions total weight to determine the delivery charge.				
Level/Delivery charge	Enter up to ten levels (of transaction value or weight depending on how delivery charges are calculated) and associated delivery charges (which should be entered net of tax).				
Notes	• The delivery charge is assumed to be in company base currency. For foreign currency transactions, the delivery charge is converted to the transaction currency using the house exchange rate enforce on the transaction date.				
	• Delivery charges should be entered net of tax. Tax will be applied to the delivery charge at the appropriate rate as the transactions are invoiced.				
	• When the transaction desktop calculates or recalculates an automatic delivery charge it is displayed on screen, depending on an authorisation point the operator may or may not manually change its value.				
Delivery charge for overseas deliveries	Enter a fixed delivery charge to be used for transactions where the delivery address is in a country that differs to the company country.				

Author	DCP	
Project	ZS60_000221.doc	
Version	1.0	6 of 7

#### **Delivery Charge Window**

🔍 global-dev:23 - P2 - Transaction Entry	
File Run Settings Options Help	
Delivery Charge	
<ul> <li>Details</li> <li>The below delivery charge has been calculated by the system based on the transaction value.</li> </ul>	
Product P&P     P     P     P	
Delivery charge 15.00	
	ОК
Partition 2 Computer 1D	14:40:40 D

This window appears when you finish entering a new transaction or amending an existing transaction (that already has an automatic delivery charge line) via the SOP Transaction Desktop. It only appears in systems where the automatic delivery charge settings have been configured. Note This window does not appear for repeating orders, invoices or credit notes. Purpose This window is used to show the system calculated delivery charges within the SOP Transaction Desktop. Depending on individual users authorisation the delivery charge value can be amended. Note Automatic delivery charges are only calculated, recalculated and applied to transactions processed via the SOP transaction desktop and not those processed via sales order entry. The prompts are: **Delivery charge** (Display only) The product used for automatic delivery charges. product **Delivery charge** (Display only unless user is authorised to amend and delete automatic delivery *charges*) This is the automatic delivery charge calculated by the system. Note The automatic delivery charges calculated does not include tax, if the transaction is taxable then the correct tax amount for the delivery charge will be calculated when the transaction is invoiced.

Author	DCP	
Project	ZS60_000221.doc	
Version	1.0	7 of 7