



Global 3000 Service Pack Note

SOP Transaction Desktop - Automatic Delivery Charges

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Project	ZS60_000221.doc		
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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.

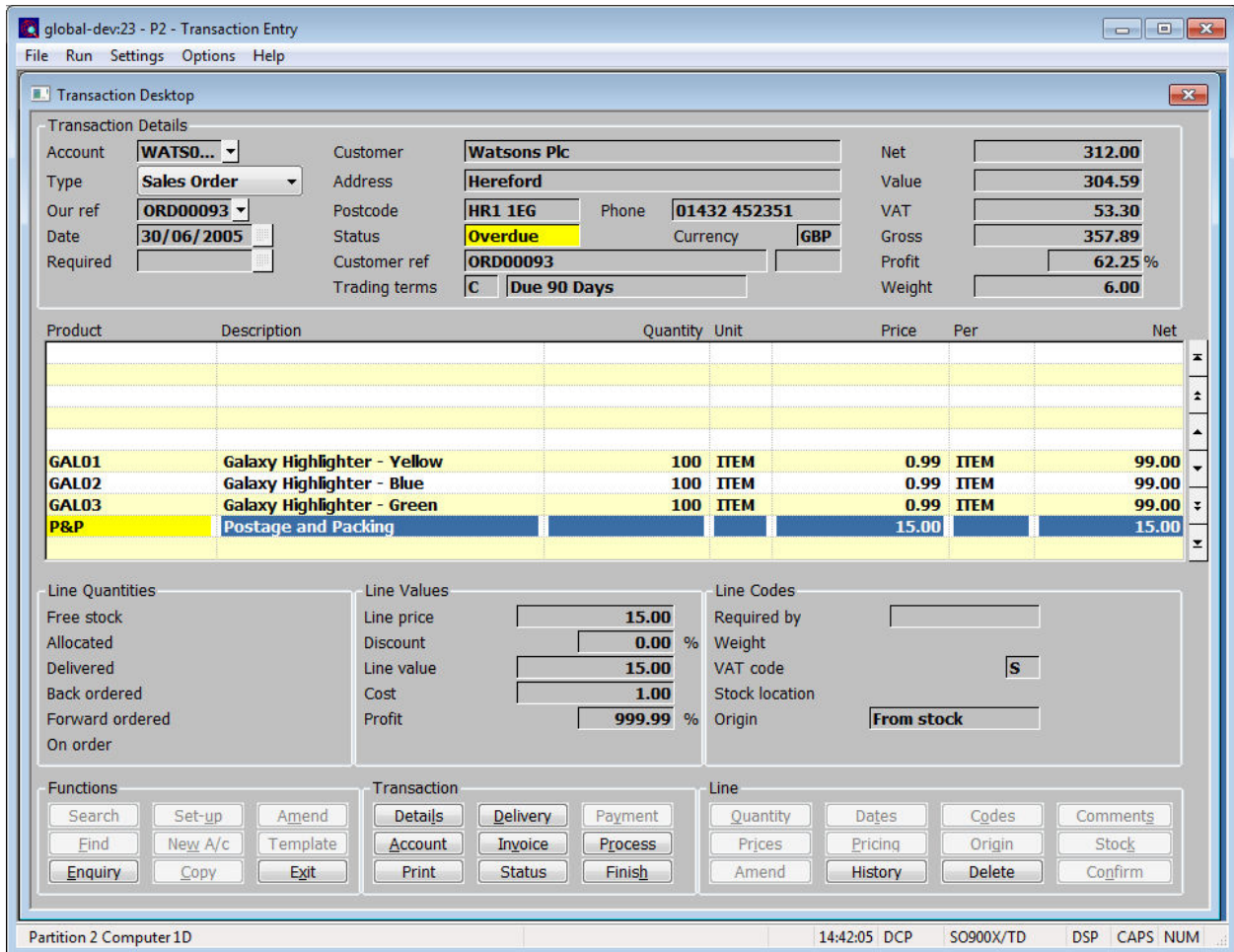
Notes:

- 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.

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DOCUMENTATION CHANGES

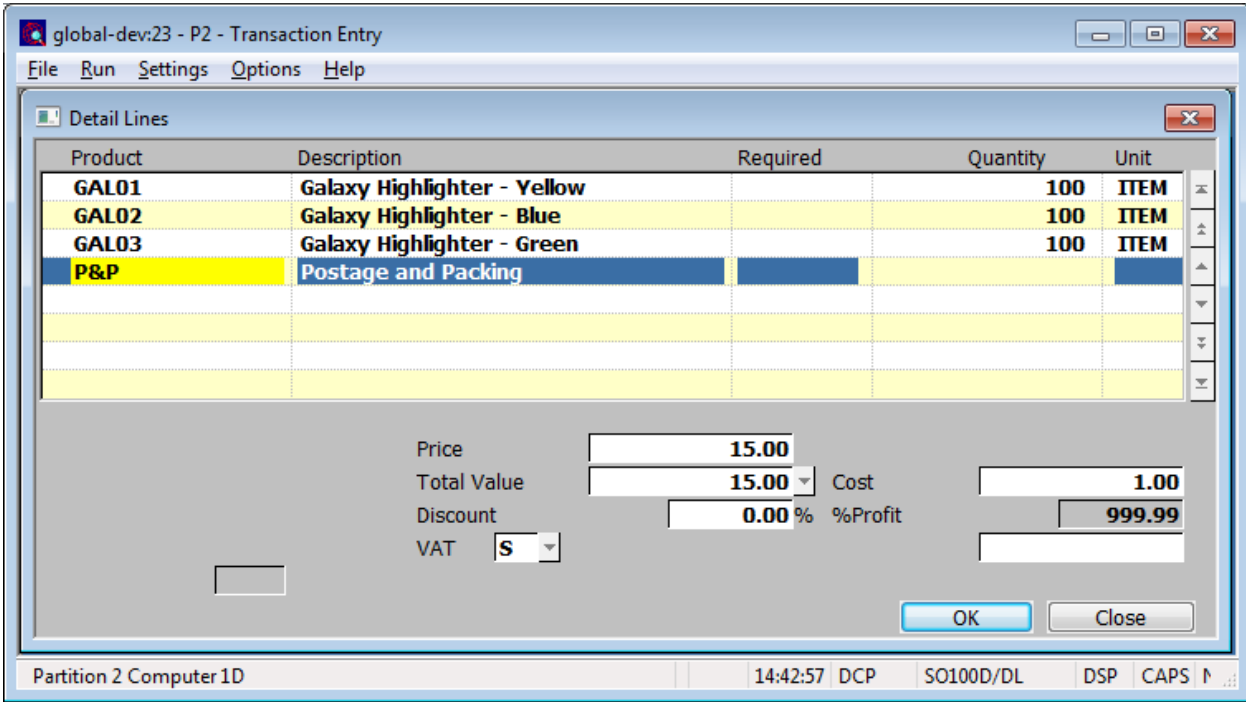
SOP Transaction Desktop Window



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.

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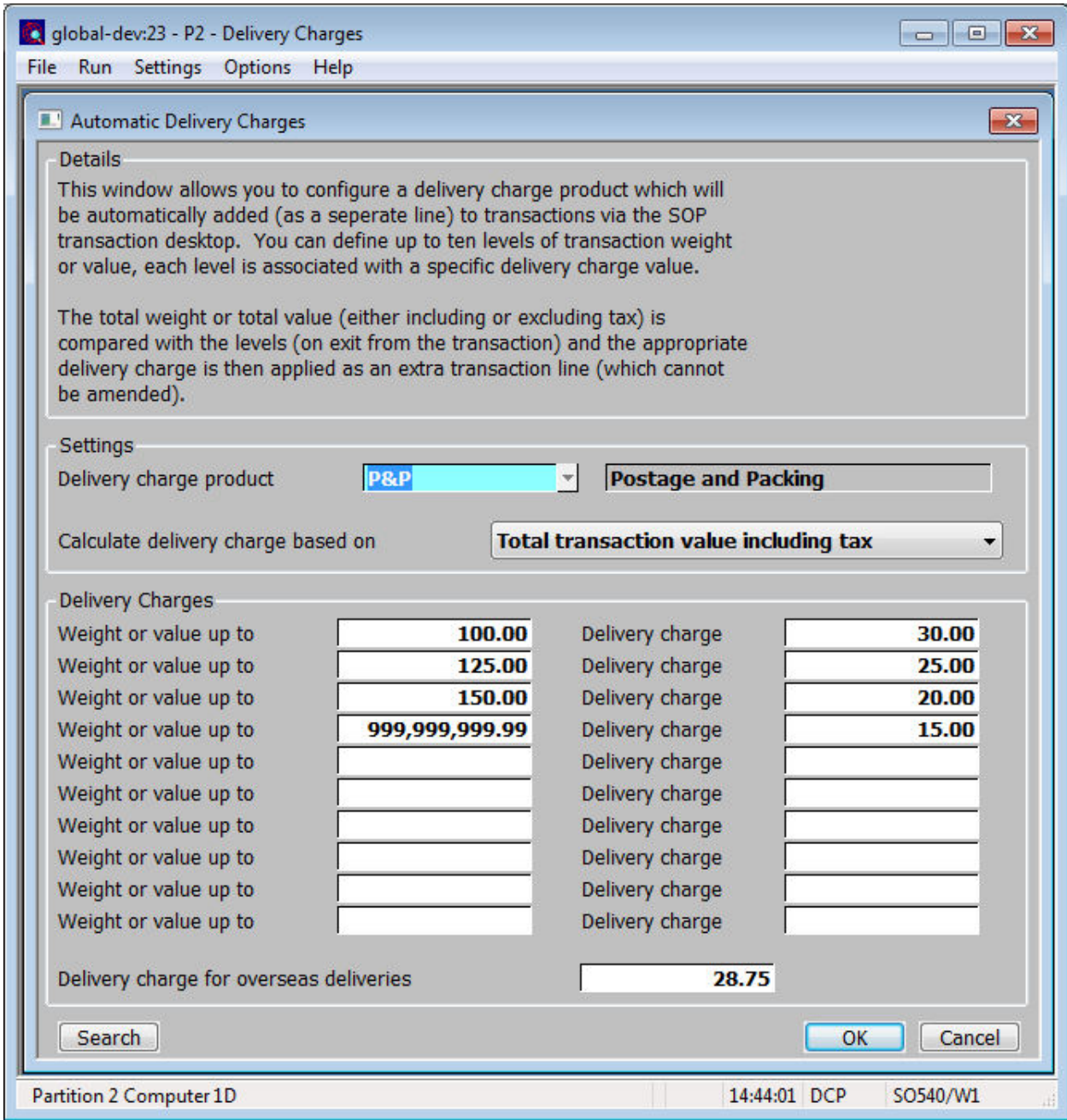
SOP Order Entry – Detail Lines Window



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.

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Automatic Delivery Charges Window



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:

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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).

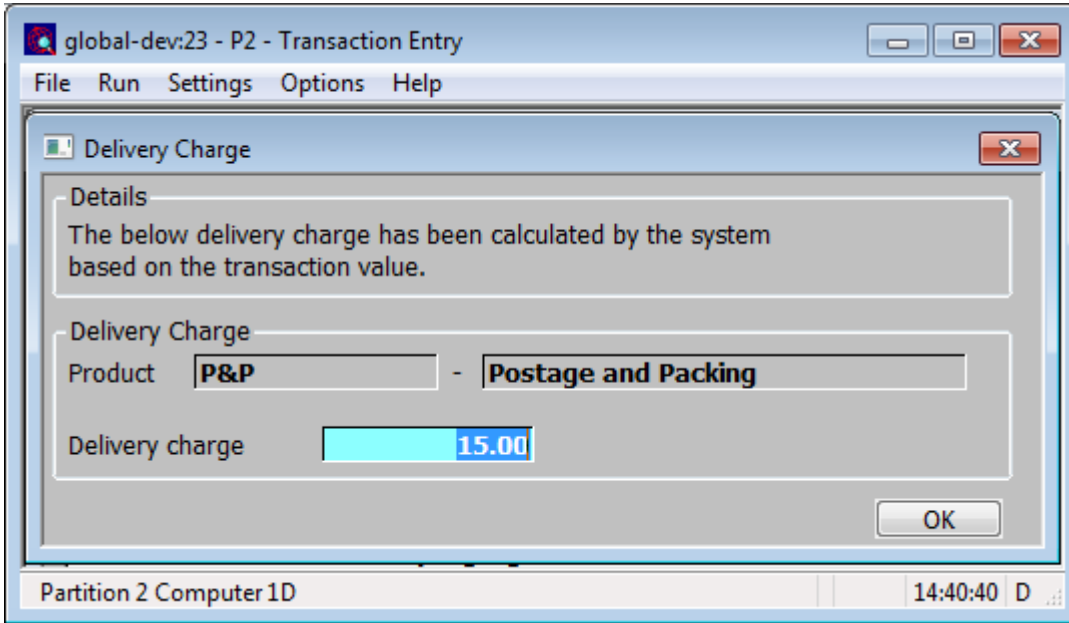
Notes

- 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.

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Delivery Charge Window



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 product *(Display only)* The product used for automatic delivery charges.

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.

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