

CAUTION !! All new procedures and processes should be checked in the 'Test' environment before being applied to the 'Live' business system.

SALES ORDER ENTRY – Ver 2

The Enter Order program allows the user to enter Sales Orders into Sapphire. A Sales Order consists of a Sales Order Header and Sales Order Lines.

Sales Order Processing, Order Maintenance, Enter Order

Select Account by Number

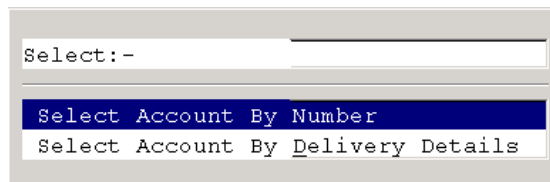
When selecting this option the user will be presented with the Sales Order Header with the Account field highlighted. Simply enter the Account Number into this field or use Search.

Select Account By Delivery Address

The Account By Delivery Address selection allows the user to select an Account by a Delivery Address related to that Account. Several Delivery Addresses may be defined for each Account each having a unique reference. When selecting this option the user may enter the Address into the Delivery Short Name field. The Search Facility will provide the user with a list of addresses for the selected account.

Parameter: 'Account Selection By'

If the parameter 'Account Selection By' is set to the 'Both' option then the user will see the following screen.



The screenshot shows a window with a label 'Select:-' and a dropdown menu. The dropdown menu is open, showing two options: 'Select Account By Number' (which is highlighted in blue) and 'Select Account By Delivery Details'.

On entering a Sales Order the user must select a Sales Account on the Order Header, and when this parameter is set to 'Both' the user may select the Sales Account by Number or Delivery Details. Please see the parameters datasheet.

Credit Status Box

After selecting the Sales Account, Sapphire will display the Credit Status Box

The screenshot shows a window titled 'SMS-SALES-ORDERS - Sapphire Technologies'. The 'Credit Status Box' is a sub-window within it, highlighted by a red oval. The box contains the following fields and values:

- Order No: 10006
- Date: 05 Nov 2004 16:24
- Country: []
- Currency: []
- Exch Rate: 0.00000000
- Account: E001
- Company: Eagle Products
- Address: Unit 9, Diplocks Way
- Balance: 0.00
- Limit: 0.00
- Available: 0.00
- Turnover Month: 0.00
- Year: 0.00
- Last Transaction: []
- Account On Stop:

This box provides an up to date summary of the Sales Account .The following information is displayed

- | | |
|------------------------|--|
| Account | Current account under view. |
| Company | Company name linked with the account. |
| Address | The address of the organisation. |
| Balance | Current account balance taken from the accounting system. |
| Limit | Credit limit available to the account holder. Defined within the accounting system. |
| Available | The amount of available credit left including current Sales Orders. |
| Account On Stop | Indicates if the account has been placed on stop. This could occur if the account exceeds the predefined credit limit. |

Note: Parameter 'Place over credit orders on hold automatically' if set at 'YES', allows a user to define whether or not an account is stopped automatically after exceeding the Credit Limit.

It should also be noted that Order Lines may still be added to the Sales Order created from an Account on hold but the Sales Order is automatically placed on hold.

- | | |
|----------------------------|--|
| Turnover Month/Year | Account turnover snapshot of this Month and this year. |
| Last Transaction | Shows last transaction date. |

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Sales Order Header fields

After exiting the Credit Status Box the Sales Order Header is accessible for data entry.

The screenshot shows a software window titled "SMS-SALES-ORDERS - Sapphire Technologies". The window contains the following fields and values:

Order No	10006	Country	GB	Currency	Pounds
Date	05 Nov 2004 16:24	Exch Rate	1.000000000		
Account	E001	Short Name	Eagle	Delivery Address Number	NONE
Company	Eagle Products		Name		
Invoice Address	Unit 9, Diplocks Way Hailsham East Sussex		Del	Addr	
Post Code	BN27 2JT	PC	Route		
Their Ref	Contact		Con		
	Tom Pearce		Tel		
Telephone	01323 841699				
Value		Due Date	Depot	VAT	E
O/S Value	0.00	Settlement	NO	0.00%	Payment Term
Margin %	0.00	Order Type			0 Days

At the bottom of the window, it says "Sales Order Entry".

The field functions are defined below.

Order Number

The Order Number is the unique identifier, which is incremented automatically when entering a new Order.

Note: The parameter 'Last Order Number' allows the user to enter the last occurring Order Number. When creating a new Sales Order Sapphire uses the next occurring number.

Note: If the parameter 'Ability to enter order number' is activated (Set at 'YES'), the user can override the incrementing number. Please see the parameters datasheet.

Date

Sapphire automatically enters today's date into this field. The user may amend the date by moving the cursor and entering any date before or after the entry.

Account/Company/Short Name

These fields note the Account Name, Company Name and abbreviated company name. These details are maintained within the Accounting System.

Country/Currency/Exchange Rate

These fields cannot be influenced from the Sales Order Header screen. They are maintained within the Accounting System. Sapphire reads these values.

Note: If however the parameter 'Ability to edit exchange rate on FC order' is active (set at 'YES'), a user may enter the current exchange rate into the Currency Conversion Rate box, which will appear upon completion of the Sales Order Header.

Invoice Address and Delivery Address

Sapphire provides the option to differentiate between the Delivery Address and the Invoicing Address. Please note that if the Invoice Details, Delivery Address or both are specified in the Accounting System then that default will be used after choosing the Account Number.

Note: If the Parameter 'Ability to edit delivery address on orders' is inactive (set at 'NO') then Sapphire simply skips over the Delivery Address fields but still defaults the data from the Accounting System. In this case the Delivery Address fields are not amendable from the Sales Order Header.

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Note: If the Parameter 'Default Delivery Address to Invoice Address' is active (set at 'YES') then the invoice address fields will use the delivery address data.

O/S Value

Displays the current Order Sales value. It calculates the accumulated sales value from all the Order Lines associated with this Sales Order, using selling price as its basis.

Note: O/S Value will not appear on the Sales Order until an Order Line(s) has been added.

Margin %

The Margin field calculates and displays the profit margin by subtracting Cost Price from Selling Price and converting to a percentage.

Note: Please see the parameters datasheet for Cost Price basis options, and accessibility of Margin.

This information is displayed on the Sales Order, communicating to the user the profit margin at any time but only if Margin field is made available by the administrator.

The Order Sales Value and the Margin function may be particularly useful in a telephone sales function providing the user with instant information. This could enable a user to negotiate a discount without having to perform complex calculations manually or re-enter order details.

Due Date

This field allows the user to enter a customer's expected date of delivery. This date is viewable in SOP and WOP to assist in operations management and delivery decisions.

Note: Please also see the parameters datasheet

Settlement/Payment Terms in Days

These two fields allow a settlement clause to be entered against a Sales Order. The primary function is to allow discount for early payment.

Note: 'Payment Terms in Days' can be specified in the accounting system and will automatically default to that setting on the Sales Order. The user can then amend these details as required per order.

In order for the settlement clause to operate all Order Lines attached to a Sales Order must be processed otherwise Sapphire will not be aware of its status.

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Foreign Currency Conversion

Note the parameter 'Ability to edit exchange rate on FC order'. After all details have been entered onto the Sales Order Header and if this parameter is active, the user has the ability to edit the Exchange Rate on an individual Sales Order. If this parameter is active then the Currency Conversion Rate box will appear after the Sales Order Header prompting the user to update the rate. If this parameter is inactive the box will not appear.

This feature allows the user to amend the default exchange rates set by the administrator in the Accounting System.

The following fields are displayed in the Currency Conversion Rates box

Currency Conversion Rates			
Rate From	<input type="text" value="3.10000000"/>	DM	to <input type="text" value="£"/>
Rate To	<input type="text" value="1.00000000"/>	£	to <input type="text" value="£"/>
Combined Rate	<input type="text" value="3.10000000"/>	DM	to <input type="text" value="£"/>

Rate From

Use this field to enter the current Exchange Rate. For example the number of German Marks to one pound Sterling. This is the only accessible field on in the Currency Conversion Rate box.

Rate To

Displays a single unit of Sterling equivalent to the Foreign Currency.

Combined Rate (This field is only applicable if a currency uses the EURO).

The user enters the value of the Foreign Currency that is equal to a unit of Sterling. All Order Lines associated with this Sales Order will then contain a Selling Price in the selected Foreign Currency's up to date Exchange Rate.

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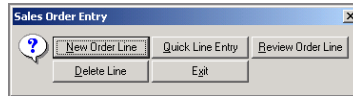
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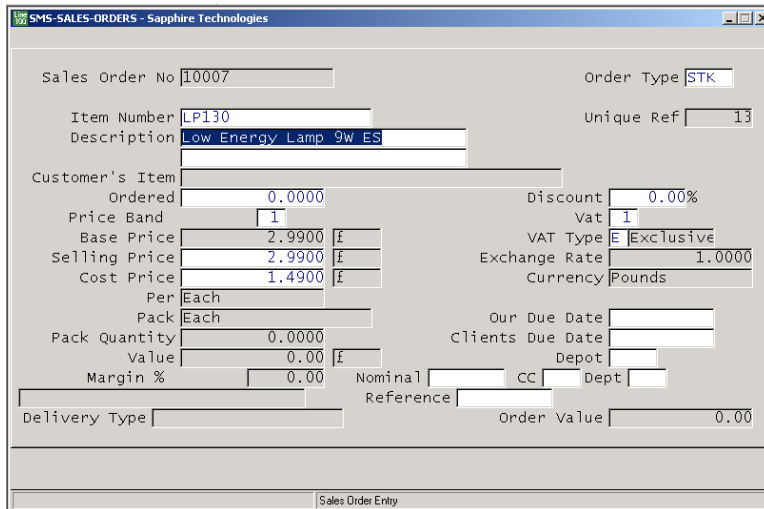
Sales Order Line

When customer details are completed within the Sales Order header, the New Order Line screen is available. The options available are:



New Order Line

The New Order Line program allows Order Lines to be created on a Sales Order



SMS-SALES-ORDERS - Sapphire Technologies

Sales Order No 10007 Order Type STK

Item Number LPI30 Unique Ref 13

Description Low Energy Lamp 9W ES

Customer's Item

Ordered 0.0000 Discount 0.00%

Price Band 1 Vat 1

Base Price 2.9900 £ VAT Type E Exclusive

Selling Price 2.9900 £ Exchange Rate 1.0000

Cost Price 1.4900 £ Currency Pounds

Per Each

Pack Each Our Due Date

Pack Quantity 0.0000 Clients Due Date

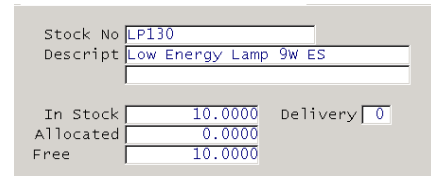
Value 0.00 £ Depot

Margin % 0.00 Nominal CC Dept

Reference

Delivery Type Order Value 0.00

Sales Order Entry



Stock No LPI30

Description Low Energy Lamp 9W ES

In Stock 10.0000 Delivery 0

Allocated 0.0000

Free 10.0000

Order Lines can consist of orders for stock or non-stock items.

When selecting the New Order Line option, the user is initially asked to enter an Item Number into the field Item Number. The following information is displayed in the In Stock Box:

Stock No	The Stock Item Number.
Description	Description for the Stock Item from Stock Control.
In Stock	Quantity of the Stock Item available from Stock.
Allocated Stock	Quantity allocated to Sales Orders and Works Orders.
Free Stock	Quantity of non-allocated Stock Items.
Delivery	The Lead Time from Stock Control under the Item Master options
Sales Order	The sales order number from the order header

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Item Number and Description

Applies to Stock Item Order Lines. The Item may be changed at any time during the Line creation process. The user can use the '/' Search Facility to display a list of possible entries or enter a unique number. The Description field displays the text attached to the Item, also amendable from this screen for this sales order line. To amend the default text setting, go to Stock Control module and the Item Maintenance option.

Note: If the parameter 'Use Customer Prices Only' is active (Set at 'YES') then only Items that have been added to individual accounts Customer Specific Pricing program can be selected in this field. If the parameter is set to 'NO' then any Stock Item can be selected in this field.

Order Type

The available order types are

MFR	Manufacture. For manufacture to order. User has the ability to create a works order directly from the Order Line.
RES	Resale. For goods bought for direct Resale. Allows a Purchase Order link to the Sales Order, and provides a back to back ordering function.
PRC	Process. For process only jobs. In this case the customer provides material for processing.
STK	Stock. For directly from stock. Allows the line to be satisfied direct from available stock.
SRV	Service. For manufactured items requiring a Works Order but with no Bill of Materials or finished goods to be booked in to stock. The Manufactured Quantity on the Order Line is incremented by use of Shop Floor Data Capture module.
Non	Non Stock. This option is for Non Stock items such as carriage and training. By using this function these Items can still be added to Stock Control and thus added to Sales Orders but Stock quantity is not removed at Despatch.

Parameter: Use Intelligence on Sales Order Line Type

If the parameter is active (set at 'YES') then the Stock Item type from the Stock Item Master is defaulted to the Sales Type on the Order Line.

If no value has been entered into the Sales Type field on the Item Master when moving the cursor to the Order Type field, the user will be forced to enter a value from a pop up menu. The values displayed are as described above

If the parameter is inactive (set at 'NO') then the user has access to the parameter 'Default Order Line Type'. In this case the user may enter the values MRF, RES, PRC, STK, SRV, NON or leave the parameter blank. The selection available cause these outcomes:

If the user enters no value into the parameter 'Default Order Line Type' (leaves it blank), then the Stock Item type from the Item Master will be defaulted to the Sales Type on the Order Line. If no value has been entered into the Sales Type field on the Item Master when moving the cursor to the Order Type field, the user will be forced to enter a value from a pop up menu. The values displayed are as described above

If the user enters a default value into the parameter 'Default Order Line Type' then Stock Items with a value in the Item Master field Sales Type use their own value in the Order Type field. Stock Items with no value in the same Item Master field Sales Type will use the default value entered into this parameter.

Note: Regardless of settings defined in parameters, the user may edit the default entry into the Order Type field.

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Unique Ref

A field containing an automatically incrementing number used to identify the Order Line. A single Order Line then has the flexibility to be added to a Picking List, manufactured and delivered separately from the remaining Order Lines on the original Sales Order.

Customers Item

Contains the customer's reference for the Item ordered. This field can be set to default to the customer's reference code per Item from the Customer Details section under the parameters menu. The information entered into this field is amendable from the Order Line.

Ordered

The quantity of the Item ordered.

Note: If the parameter 'Enable advanced discounting/pricing system' is active, then upon entering a quantity in this field, a user will be presented with the Apply Sales Discount Rule Shortlist screen. See parameters data sheet for details.

Price Band

In Stock Control there are five Price Bands which can contain different prices. A Price Band may also be added to a Sales Account from the Accounting System. The user can select one of these here.

Note: If the parameter 'Ability to override customer prices using price band' is active (Set at 'YES') then changing the band on the Order Line will influence the selling price. If the parameter is inactive however then a user will be prompted to confirm the Price Band change.

Base Price

The Base Price field is used to indicate the value of a single Item in Sterling, and is only applicable when an Order Line has been created for a Foreign Account. When changing the Selling Price for an Item on the Order Line, the Base Price is updated accordingly. (Base Price=Selling Price/Exchange Rate).

Price Type and Discount Rule

This field is used to display discounting and pricing information depending on what has been selected and what is applicable. Data entered into either Customer Details, Discount Rules or Price list will all influence this field and the Order Line. (See separate datasheet)

The following text will be displayed depending on the options selected

Customer Discount	When selecting Discount % discounting.
Actual	When selecting Actual discounting.
Mark Down	When selecting Mark Down discounting.
Discount Rule	When selecting a Price List.

When none of the above apply, the field Price Type and Discount Rule is left empty.

Selling Price

The Selling Price is the price per Item. The user has the option to adjust the Selling Price on the Order Line by directly entering a numerical value. This field may also be influenced by Customer Details, Discount Rules, Price Lists or Price Band selection.

The parameter 'Do not allow price override' if active (set at 'YES'), prevents the users entering data directly into this field. If inactive (set at 'NO') then the user has access to amend the Selling Price.

The parameter 'Ability to override Customer Prices on Orders' also affects the field Selling Price. If active (set at 'YES') a user can amend the Selling Price when a Customer Specific Price comes into effect. If inactive (set at 'NO') then a user will be unable amend the Selling Price.

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Cost Price

The Cost Price is defaulted from the Stock Item Maintenance Price section. It allows the user to see the cost of a single Item at anytime. Depending on parameter setting a user may or may not have access to amend this field.

The parameter 'Ability to override cost price on orders' when active (Set at 'YES') allows a user to enter data into this field.

The parameter 'Default Cost Price to Selling Price on Non-Stock Order Lines' if active (set at 'YES'), enters the Cost Price for a Non-Stock Item into the Selling Price field.

Per and Pack fields

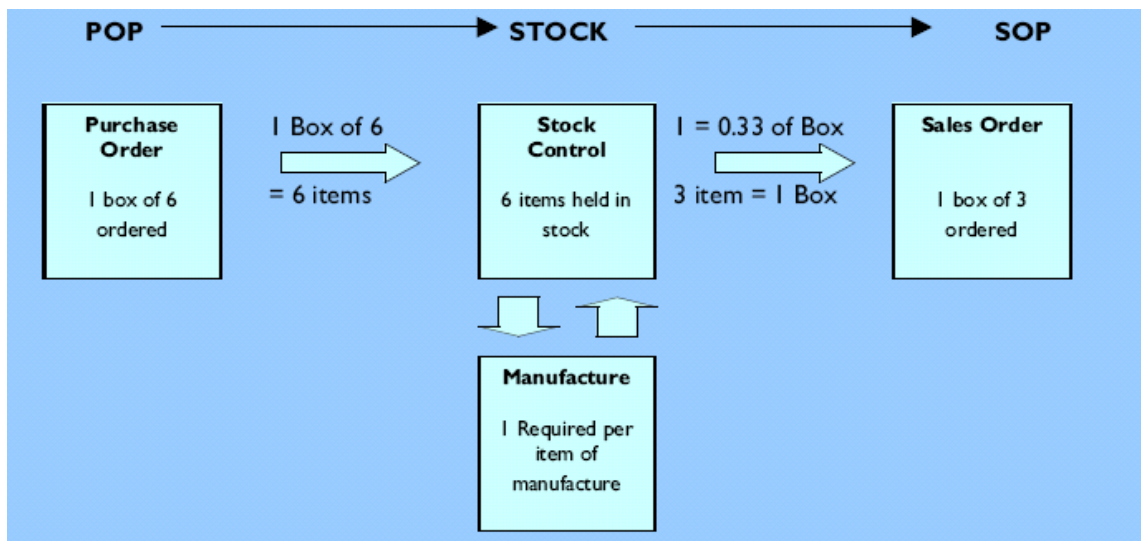
The fields Per and Pack are an Order Line link to Factored Pricing information and Stock Item structure. The primary purpose of Factored Pricing is to link quantity and pricing differences where items are

- OR purchased and stocked
- OR stocked and used by manufacturing
- OR stocked and sold

in different Units of Measure

On the Order Line screen, the Per and Pack fields generally display how goods are packaged for sale e.g. in a box of three.

The concept starts with the way stock is packaged by a supplier when purchased by an organisation. For example, stock is purchased as a single Item in boxes of 6 but used in a manufacturing process as individual Items. In addition these Items are also stocked for resale in boxes of 3 (see diagram below). This creates a need to hold the Item in stock individually to deal with the differing quantities used throughout the system. Factored Pricing provides the facility to deal with this stock management problem.



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Value

This field shows the current calculated Order Line Value.
(Value=Selling Price*Quantity-Discunt).

Note: The Selling Price and Discount are influenced by Price Lists and Discount Rules.

Margin %

The Margin on the Order Line is calculated by subtracting Cost Price from Selling Price and converting to a percentage. The Cost Price calculation basis is selected when creating a Stock Item.

[See the parameter 'Margin Analysis' for available options](#)

Discount

This field displays the discount attached to the Order Line. Discounts can be added by

Direct entry onto the Order Line using the Discount field. (This is only possible if parameter 'Do Not Allow Discount Override' is inactive). In this case Sapphire subtracts the discount percentage from the total Order Line value.

Discounts can also be set-up by Item and by date that are then automatically added to Order Lines when their parameters are met. See Discount Rules for further details.

A discount can also automatically default by Sales Accounts for individual Items. A user can define a discount range per Item under each Sales Account

Please see the separate datasheet for discount information

VAT

This field allocates a VAT code to the Order Line. VAT codes can be set and amended from the Accounting System

Exchange Rate

For Foreign Currency orders. Please see the separate datasheet.

Currency

The default currency that the account uses. It can be set and changed from the Accounting System under Account Maintenance..

Due Dates (Ours/Clients)

The Due Dates field displays the date of delivery under two values, Ours and the Clients. These fields can be used in

Planning effective delivery, to differentiate between despatch and arrival dates thus allowing for transit time.

Displaying the latest date of manufacturing and clients expected delivery date.

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Nominal, CC and Dept

This function is used to link a Nominal Ledger Account to a Sales Order Line. The Nominal Ledger is the core of the Accounting System. It maintains accounts for revenue and expenditure and accumulates the information from other the Accounting System modules. By linking an Order Line to a Nominal Ledger it enables a user to analyse Sales Order information. A Nominal Account code must be added to complete the Order Line creation.

Cost Centre functions are a way to segregate Cost Centres, for example to subsidiary companies. It allows a user to relate the Sales Order line to a Cost Centre. Cost Centres default values can be set from the Accounting System.

The Department allows the user to breakdown the Cost Centre further by allocating Sales to specific departmental groups.

Delivery Type

Please see the parameter 'Customers Details'. A default delivery can be selected by customer, product group or stock item.

Inputting one of the following options against this field will cause that value to appear on an individual Order Line under the Delivery Type field. It is important to note that attaching this information to an Order Line has no influence on order cost. The Delivery Type field on an Order Line is used as a reference for Sales staff calculating Carriage and actually despatching the goods.

Note: Using Amendable Stationary Layouts the Delivery Type field can be placed on Picking Lists, Invoices, Despatch notes etc.

The following is a brief description of each delivery standard

Delivery	Land based delivery with no insurance attached.
Ex-Works	No carriage or insurance. Customer picks up goods.
FOB	Free on Board, a partial delivery charge. Supplier pays delivery to the dock, customer pays remaining delivery charge to destination.
CIF	Carriage Insurance and Freight. Where carriage is land based delivery and freight covers air and sea. Both are also covered by insurance.
Other	User defined field. Could include segments of above standards.

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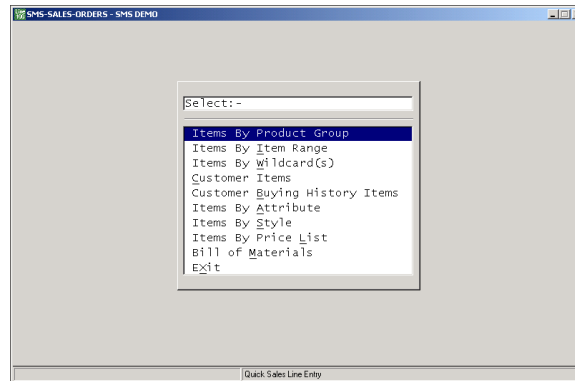
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Quick Line Entry

See the parameter 'Default Quick Line Entry Type'. To display all filters enter 'Allow Selection'.

Quick Line Entry is an abbreviated version of the above Sales Order Line entry, retaining only the main features of an Order Line and in some cases in a shorter format.

The Quick Line Entry screen allows a user to enter several Order Lines in quick succession by entering the quantity of an Item required directly onto a Line beside each Item type. Prior to Order entry however the user must define a filter to select the Items required and display them on a list. When entering the Quick Line Entry function the user has the option to filter Items using one of the following filters.



Items By Product Group

This option filters Items by Product Group range. All Items within that Product Group Range are then displayed on the Quick Line Entry screen.

Items by Item Range

This option allows the user to select the range of Items to include on the Quick Line Entry screen. Items are arranged in alphanumerical order in the Stock Control File. When selecting range the user must select a start and end value from the alphanumeric list.

Items By Wildcard(s)

The Items by Wildcard(s) options is a versatile function that allows the user to filter Stock Items by a partial name. Use the '*' (Asterisk) key as a Wildcard to replace letters.

Customer Items

This option displays the Stock Items added to the Customer Details function for the Sales Account selected on the Sales Order Header
Please see the Customer Details section for further details.

Customer Buying History

Facility to display displays all Items Numbers previously purchased.

Items By Attributes

Attributes are created and added to an Item from Stock Control and are used throughout the system allowing user definable values for each Item. When selecting this option Sapphire displays eight Attributes. The user may then enter the appropriate value under each Attribute heading. All Items which contain the selected values are then displayed on the Quick Line Entry screen.

Items By Style

This option allows the user to select a single Style. All Items created from that Style are then displayed.

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Items By Price List

When using this option, Sapphire will display all available Price Lists from which the user must select one. After selection the Price List details are displayed.

Bill of Materials

Selects all items with a BOM (assemblies)

Quick Line Entry screen

Item Number	Description	Quantity	In Stock
CA1600	Pump Unit (Enclosed) 800 LPM		0.0000
CA2700	Pump Assembly 3HP/800LPM		0.0000
CA2750	Control Panel		3.0000
CA3800	Electric Motor 3HP 415V 3PH		3.0000
CA3850	Centrifugal Pump 800LPM		3.0000
EF3094	13A Fuse to BS1382		0.0000
PT5000	13A Plug Top to BS1363		0.0000
PT5010	Base Assembly (Phantom)		0.0000

Price: Price Type: Our Due Date:
Disc %: Line Type: Cli Due Date:
Desc 1: Desc 2:
Nominal: CC: Dept: Unallocated Stock: 0.0000
1 Each = 1.0000 Each Line Value:
Prices In Pounds: Order Val: 0.0000 Total: 0.0000

After selecting a filter and defining the parameters, Sapphire displays a list of filtered Stock Items in the Quick Line Entry screen. From this list the user may select an Item and enter a quantity. A Sales Order Line is then created from these details.

The Quick Line Entry screen looks similar to a normal Order Line except that it contains fewer fields, several of which are abbreviated. The fields on the Quick Line Entry screen are listed below

Prices In	Displays the currency used for the selected Sales Account
Item Number	Lists all Stock Item Numbers within the selected filter.
Description	Descriptions of the above
Quantity	The quantity required
In Stock	The quantity In Stock is shown
Price	This is the Selling Price per Item. The user has the option to adjust the Selling Price on the Order Line by directly entering a numerical value. See above notes regarding pricing parameters
Price Type	The Price Type field is used to display any Price List, Customer Discount or Discount Rules that are applied to the Order Line.
Due Dates (Ours/Clients)	Due Date fields displays the expected date of delivery. See the above notes
Disc%	This field shows the discount attached to the Quick Order Line. Please see above for details

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Line Type	Line Type is the same as the Order Type field shown above
Line Value	Accumulates the value of the Order Lines in this Quick Entry option.
Desc	Description of the stock item defaulted from Stock Control.
Desc 2	Free text area of 30 characters of additional notes.
Nominal	Please see above for details
1 (Factored Pricing)	Sapphire uses this field to display how an Item is packed for sale as described above.
Total	Displays the accumulated total on all Order Lines on this Quick Order Entry.

Review Order Line

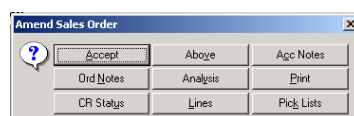
This gives the user an option to return to any Order Line on the Sales Order. After selecting this function a user can select the appropriate Order Line and amend the details. Scheduled Lines that are displayed as Order Lines can be split into Scheduled Lines themselves from this option.

Delete Line

Simply allows the user to select a single Order Line for deletion and deletes any scheduled lines attached. This will not affect other Order Lines.

Exit

Returns to Sales Order Header Menu and allows the user to amend details on the Header, enter Notes, enter Analysis fields, delete the Sales Order, Print, check Sales Account details and return to the Order Line menu.



Accept

Accepts the Sales Order and returns to Enter Order menu.

Above

Allows amendments to the following fields on the Sales Order Header

Date	Delivery Address Number
Account	Name
Invoice Address	Del Addr
Post Code	PC
Their Ref	Con
Contact	Tel
Telephone	Settlement
	Pay Terms

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Unit A, Tayside Software Centre, Technology Park, Dundee, DD2 1TY

Email: sales@bluestone-solutions.co.uk www.bluestone-solutions.co.uk

Offices in Leicester & Bristol. For all locations contact (0800) 027 3775

Acc Notes

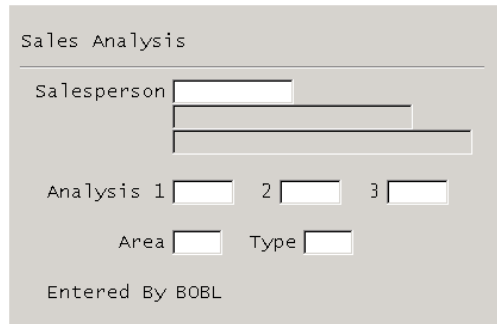
Opens the Accounts Notes function.

Ord Notes

Opens the Order Notes function.

Analvsis

These are analysis fields that can be entered in the Sales Order Header, and are shown below. Once entered, Sales Order Headers can be analysed using these codes.



Sales Analysis

Salesperson

Analysis 1 2 3

Area Type

Entered By BOBL

The information available for entry into the Salesperson and Area fields are defined using the Sales Representatives and Area Code options found in the Parameters menu.

The Analysis Codes 1-3 are entered into the system from the Accounting System Manager, Parameters option.

Delete

Allows the user to delete the Sales Order but only if no Order Lines are attached at that time. It deletes the Sales Order header and information only. If Sales Lines are attached the system will warn the user and will not allow deletion from this function.

Note: The parameter 'Ability to delete order during create' influences this delete Sales Order option. If this parameter is not active (Set at 'NO') then a user will be unable to see the option during the Enter Order function.

Note: The Delete Order function in the Order Maintenance menu allows deletion of a Sales Order including Order Lines, Scheduled Lines. See the Delete Order section for further details.

Print

Sends the Sales Order Acknowledgement to the Print Spooler.

Note: This option is only available from the Sales Order Header Menu if the parameter 'Separate Order Confirmation Printing' is inactive (Set at 'NO'). When active (set at 'YES') this option is removed.

The Order Acknowledgement is always available using the Order Confirmation option in the Reports menu.

Note: The parameter 'Print Works Loading with Order Acknowledgement' is used to add Works Loading information to the Order Acknowledgement print out.

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CR Status

This option allows the user to view the financial credit status of the Sales Account added to the Sales Order Header.

Lines

Returns the user to the Order Line menu screen.

Pick Lists

The Pick Lists option is used to display any Picking Lists that contain items from the selected Sales Order. When selecting this option the Picking List Header will be displayed initially as shown below.

View Picking List

Note: If no Order Lines from a Sales Order are part of a Picking List then the following message will be displayed

'None of the Lines on the Sales Order are in use on a Picking List'.

The base menu from the Pick List function offers the user further options to view:

Account Notes

View any notes attached to the Account.

Order Notes

View any notes attached to the Sales Order.

List Lines

Lists any Order Line(s) attached to a Picking List on that Sales Order. User can view any of the Order Lines allocated to Picking List by using cursors for selection.

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Note: The user is unable to amend Order Line details from this option, the Lines option from the Amend Menu allows this task.

Double clicking the Order Line provides a further level of menu detail

Order Details

Displays the original Order Line on screen that the Picking List Line was created from.

Line Details

Displays the Picking List Line in detail including Required and Picked Quantity.

Line Notes

Displays any Line Notes attached to the Order Line.

Exit

Exits the List Line menu and returns to the Pick List menu.

Sales Order Processing, Order Maintenance, Amend Order

The Amend Order program allows Sales Order details on the header to be amended. Order Lines can also be added, amended and deleted using this program.

Note: Sapphire provides an Amendments Log facility where certain changes made during the Amend Sales Order program will be logged. This amendment log facility is turned on by the parameter 'Keep Amendments Log' in SOP, Utilities, Parameters, General. Changes such as deleting an Order Line, amending the ordered quantity or amending the delivery date will be recorded within the Amendments Log. Any amendments within the log can then be viewed using the enquiry facilities in SOP or printed using a print facility.

Note: The ability to print an Order Acknowledgement for the customer from within the Enter or Amend programs is controlled by the parameter Sales Order Processing, Utilities, Parameters, Options, General, 'Separate Order Confirmation printing Y/N'

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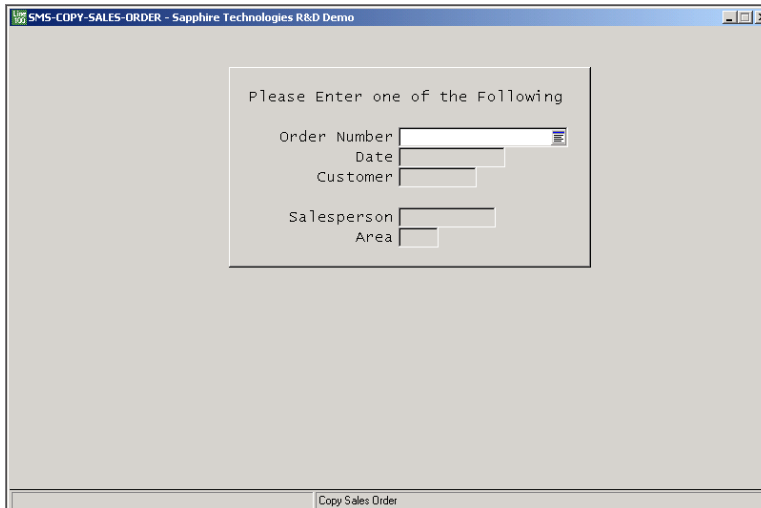
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Sales Order Processing, Order Maintenance, Copy Order

This program allows a user to copy any Sales Orders entered into the system as a new Sales Order. The Customer Account can be changed. All Order Line details, Prices, Discounts Rules and Notes will be copied across during the copy process.

The copied Sales Order is then a completely new Sales Order. No despatch or invoice quantity details from the original Sales Order are copied.

The copied Sales Order program provides an unlimited template based Sales Processing mechanism allowing any Sales Order entered into Sapphire to be used as a template to construct other Sales Orders.



SMS-COPY-SALES-ORDER - Sapphire Technologies R&D Demo

Please Enter one of the Following

Order Number

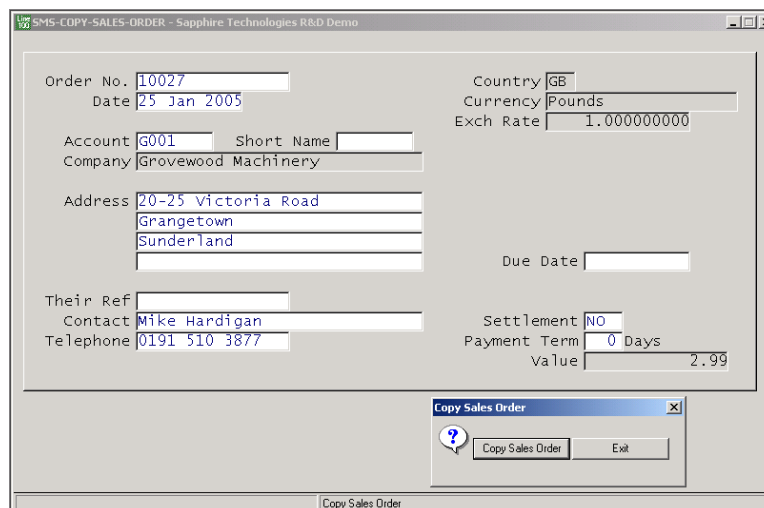
Date

Customer

Salesperson

Area

Copy Sales Order



SMS-COPY-SALES-ORDER - Sapphire Technologies R&D Demo

Order No. Country
Date Currency
Exch Rate

Account Short Name
Company

Address

Due Date

Their Ref
Contact Settlement
Telephone Payment Term Days
Value

Copy Sales Order

Copy Sales Order Exit

Copy Sales Order

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Copy Sales Order

To create a new Sales Order. Sapphire allows the user to amend the newly created Header.

Exit

To return to the Order Maintenance menu without copying the order.

After selecting Copy Sales Order the user must enter the Header details. After these details have been entered the Sales Order, Order Lines and Notes will be saved as a new Order.

Sales Order Processing, Order Maintenance, Delete Order

The Delete Order Program allows a user to delete the entire Sales Order. The program will remove the Order Header, all Order Lines and any notes held against the Order Lines.

Warning ! Take care when deleting orders as this may affect the data integrity and traceability within the system

If the amendment log for Sales Order Processing is active then all lines deleted from the Sales Order will be recorded. These lines can then be viewed at a later date.

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