

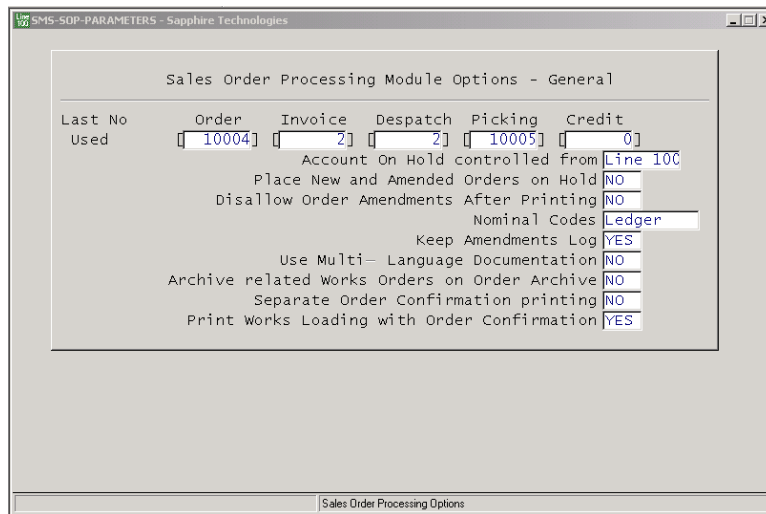
**CAUTION !!** All new procedures and processes should be checked in the 'Test' environment before being applied to the 'Live' business system.

**SALES ORDER PROCESSING PARAMETERS – Ver 3**

*Sales Order Processing, Utilities, Parameters, Options*

The options menu contains nine main headings, each of which contains parameters related to the SOP module.

**General**



**CAUTION** –It is not recommended to amend the following 'Last Number Used' fields once the system is operational.

**Last Number Used - Order**

This field displays the last Order Number created. Adjusting this number causes a newly created Order to use the next occurring number entered into this field as its unique reference.

If the parameter 'Ability to edit Order Number' = 'YES', (*Sales Order Processing, Utilities, Parameters, Options, Order Entry – General*) the user can override the incrementing Order Number. Note that this may present a risk where two or three users are entering orders simultaneously. The system will not accept an Order Number that already exists, and will wait for a valid entry.

**CAUTION** – once manual numbering has been selected, it is not recommended to return to automatic incrementing numbers.

### **Last Number Used - Invoice**

This field displays the last Invoice Number created. Adjusting this number causes a newly created Invoice to use the next occurring number entered into this field as its unique Order Number.

### **Last Number Used - Despatch**

This field displays the Last Despatch Number created. Adjusting this number causes a newly created Despatch Note to use the next occurring number entered into this field as its unique reference.

### **Last Number Used - Picking**

This field displays the last Picking List Number created. Adjusting this number causes a newly created Picking List to use the next occurring number entered into this field as its unique Order Number.

### **Last Number Used - Credit**

This field displays the Last Credit Number created. Adjusting this number causes a newly created Credit Request to use the next occurring number entered into this field as its unique Order Number.

### **Account On Hold controlled from**

The parameter 'Account On Hold controlled from' can be set to allow Sapphire or Line 100 to control the ability to place an Account on Hold.

### **Place New and Amended Orders on Hold**

### **Disallow Order Amendments After Printing**

### **Nominal Codes**

The 'Nominal Codes' setting is used to select the Nominal Account as either a Ledger, a Stock File or a Default.

### **Keep Amendments Log**

The parameter 'Keep Amendments Log' is used to toggle the use of a file that records changes within SOP.

### **Use Multi-Language Documentation**

This parameter is used to toggle the use of Language Tables that when defined can add a variety of languages to SOP documents.

### **Archive related Works Order on Order Archive**

Used to enable the archiving of attached Works Order on a Sales Order to the Order Archive.

### **Separate Order Confirmation Printing**

### **Print Works Loading with Order Confirmation**

## **BlueStone Solutions for Business**

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## **Order Entry - Defaults**

The screenshot shows a window titled 'SMS-SOP-PARAMETERS - Sapphire Technologies' with a sub-header 'Sales Order Processing Option - Order Entry - Defaults'. The window contains several configuration fields:

- Default overall Order Due Date to Today's date:  NO plus  days
- Default Delivery Address to Invoice Address:  NO
- Sales Line VAT Code From:
- Default Depot for New Orders:
- Return to New Order After Accept:  NO
- Default Order Type:
- Use Intelligence on Sales Order Line Type:  NO
- Default Order Line Type:
- Default Quick Line Entry Type:
- Default Line Our Due Date to:  plus  days
- Default Line Client's Due Date to:  plus  days

At the bottom of the window, there is a label 'Sales Order Processing Options'.

### **Default overall Order Due Date to Today's Date**

This field can only be amended if parameter 'Ability to edit overall order due date' (Order Entry - General) is active.

If the parameter = 'YES' then Today's Date will be selected as the Due Date on the Sales Order Header.

In addition, if any number between 1-999 is entered in the 'days' field, this number of days is added to 'Today's Date', which is then the value entered into the Due Date field. For example, if today's date was 01/01/2000, entering 7 into the 'days' field would enter 08/01/2000 into the Due Date field on the Sales Order Header.

### **Default Delivery Address to Invoice Address**

### **Sales Line VAT Code From**

### **Default Depot for New Orders**

### **Return to New Order After Accept**

### **Default Order Type**

### **Use Intelligence on Sales Order line type**

Parameter set to 'YES'

- if the item is an 'M' type (manufactured) the Sales Order line type will be MFR
- if the item is a 'P' type (purchased) the Sales Order line type will be STK

Parameter set to 'NO'

- Check and use the Stock Item line type
- If the Stock Item line type is blank, use the Default Order Line Type

## **BlueStone Solutions for Business**

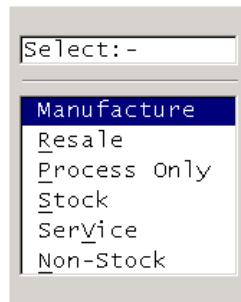
Unit A, Tayside Software Centre, Technology Park, Dundee, DD2 1TY

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## Default Order Line type

If parameter 'Use Intelligence on Sales Order Line type' is inactive then this parameter becomes active. It allows a user to select the default setting for the Order Type field by selecting one of the values shown below. This value is then inserted on all new Order Lines if the Stock Item line type is blank, but can be changed during Order Line entry.



## Default Quick Line Entry Type

The parameter 'Default Quick Line Entry Type' may be set to automatically default to a specified filter when a user enters the Quick Line Entry Screen. To display all filters, select 'Allow Selection'.

## Default Line Our Due Date to

Allows a choice of Today's Date or the order Due Date to be defaulted as the Due Date on the Sales Order line.

In addition, if any number between 1-999 is entered in the 'days' field, this number of days is added to 'Today's Date', which is then the value entered into the Due Date field. For example, if today's date was 01/01/2000, entering 7 into the 'days' field would enter 08/01/2000 into the Due Date field on the Sales Order line.

## Default Clients Due Date to

Allows a choice of Today's Date or the order Due Date to be defaulted as the Due Date on the Sales Order line.

In addition, if any number between 1-999 is entered in the 'days' field, this number of days is added to 'Today's Date', which is then the value entered into the Due Date field. For example, if today's date was 01/01/2000, entering 7 into the 'days' field would enter 08/01/2000 into the Due Date field on the Sales Order line.

### BlueStone Solutions for Business

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## Order Entry - General

Parameter	Value
Account Selection By	Both
Margin Analysis	Standard Cost
Ability to edit Order Number	NO
Place over credit orders on hold automatically	NO
Ability to edit overall order due date	YES
Ability to edit delivery address on orders	YES
Ability to delete order during create	YES
Depot is mandatory	NO
Prompt for Analysis Code Entry	NO
Ability to edit VAT Code	YES
Ability to edit VAT Type	Allow Selection
Warn if duplicate item is entered	YES
Link Sales Orders To	None
Auto Create Works Orders for New Order	NO
Auto Run Buyer's Schedule for New Order	
Stock Status on New Line Entry	Standard
Warn if Line Quantity Exceeds Physical Stock	NO

### Account Selection By

This parameter sets the way a user searches for an account. The options are:

Account/Short	User must select account by account short name only
Delivery	User must select account by Delivery details only
Both	Gives user option to select account by short name or delivery.

### Margin Analysis

Allows options None, Standard Cost and Last Buy to be selected as the default analysis value on a Sales Order (See Margin Analysis field for further details).

### Ability to edit Order Number

If the parameter 'Ability to edit Order Number' = 'YES', the user can override the incrementing Order Number. Note that this may present a risk where two or three users are entering orders simultaneously. The system will not accept an Order Number that already exists, and will wait for a valid entry.

### Place over credit orders on hold automatically

This parameter operates during Sales Order entry, and allows a user to define whether or not an account is stopped automatically after exceeding the Credit Limit. Order Lines may still be added to the Sales Order but it is automatically placed on hold.

### Ability to edit overall order due date

### Ability to edit Delivery Address on orders

If 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 field are not amenable from the Sales Order Header.

That 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.

## BlueStone Solutions for Business

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

### **Ability to delete order during create**

The parameter 'Ability to delete order during create' influences this delete Sales Order option. If this parameter is not active then a user will be unable to see the option during the Enter Order.

### **Depot is mandatory**

### **Prompt for Analysis Code Entry**

### **Ability to edit VAT Code**

### **Ability to edit VAT Type**

### **Warn if duplicate item is entered**

### **Link Sales Orders to**

### **Auto Create Works Orders for New Order**

### **Auto Run Buyers Schedule for New Order**

### **Stock Status on New Line Entry**

### **Warn if Line Quantity Exceeds Physical Stock**

#### **BlueStone Solutions for Business**

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## Order Entry - Pricing

Sales Order Processing Options - Order Entry - Pricing	
VAT Inclusive Prices Only	NO
Ability to override Customer Prices on orders	YES
Do not allow price override	NO
Do not allow discount override	NO
Ability to override cost price on orders	YES
Ability to override customer prices using price band	YES
Enable advanced discounting/pricing system	NO
Automatically accept advanced discounts/prices	NO
Use Customer Prices Only	NO
Customer Prices/Discounts override Discount/Price Rules	NO
Default Cost Price to Selling Price on Non- Stock Order Lines	YES
Ability to Edit Exchange Rate on FC Orders	YES
Use Stock Price as Master Sterling Price	NO
Apply Line Discount to Unit Price	NO
Maximum Line Discount	100.00%

### VAT Inclusive Prices Only

### Ability to override Customer Prices on Orders

This parameter is only ever considered when a Customer Specific Price is applicable.

This affects the Selling Price field on an Order Line. If the parameter is set to 'YES' a user can move the cursor onto this field when a Customer Specific Price comes into effect.

If set at 'NO' then a user will not be able to move the cursor onto the field when a Customer Specific Price comes into effect.

### Do not allow price override

If set to 'YES', will prevent the user entering data directly into the Selling Price field on an Order Line.

### Do not allow discount override

If set to 'NO', the Discount field on an Order Line will take the default value from the discount table, but a user may then change this value on an Order Line simply by moving to the field. If the parameter is set to 'YES', this function will automatically insert the appropriate percentage and the user will be unable to adjust the figure.

### Ability to override cost price on orders

### Ability to override customer prices using price band

If set to 'YES' then changing the Price Band on the Order Line will influence the selling price. If the parameter is set to 'NO' then a user will be prompted to confirm the Price Band change.

### Enable advanced discounting/pricing system

If set to 'YES' then upon entering a quantity on an Order Line, a user will be presented with the Apply Sales Discount Rule shortlist screen.

## BlueStone Solutions for Business

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## **Automatically accept advanced discounts/prices**

In addition the parameter 'Automatically accept advanced discount/prices' when activated will cause the table Apply Sales Discount Rule not to appear during Order Line entry.

If this parameter is active however, along with the parameter 'Enable advanced discounting / pricing system', then the advanced discounting and pricing system will still come into effect but the selection of the appropriate rules will be carried out automatically, hidden from the users view. See the Pricing Methodology Interrelation Matrix for further Reading on the Process of Rule application under each Pricing combination.

## **Use Customer Prices Only**

### **Customer Prices/Discounts override Discount/Price Rules**

### **Default Cost Price to Selling Price on Non-Stock Order Lines**

If set at 'YES' simply enters the Cost Price for a Non-Stock item into the Selling Price field on an Order Line.

## **Ability to Edit Exchange Rate on FC orders**

If the parameter 'Ability to edit exchange rate on FC order' = 'YES', a user may enter the current exchange rate upon completion of the Sales Order Header before Order Line entry.

## **Use Stock Price as Master Sterling Price**

## **Apply Line Discount to Unit Price**

## **Maximum Line Discount**

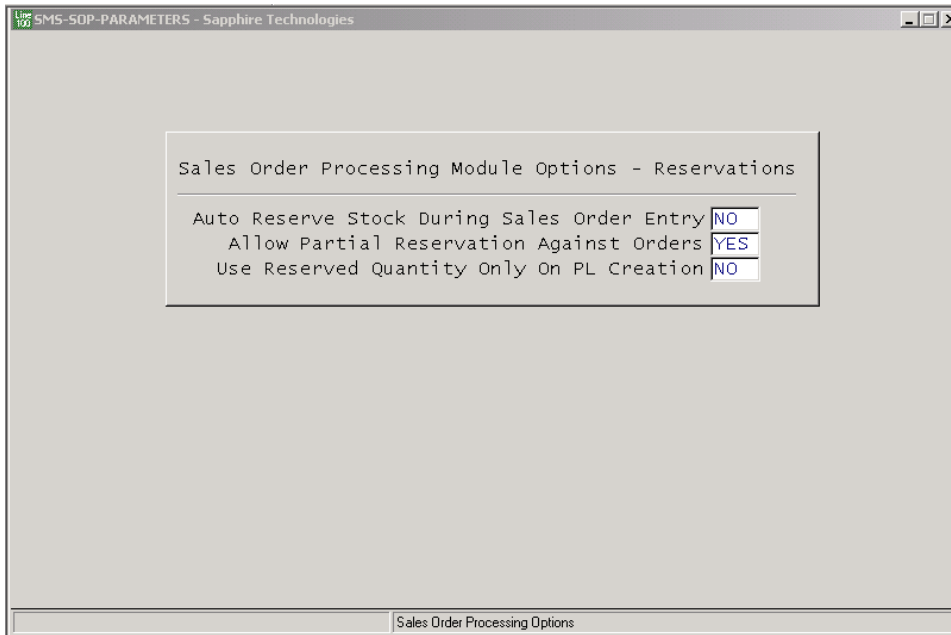
### **BlueStone Solutions for Business**

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## Reservations



The screenshot shows a software window titled "SMS-SOP-PARAMETERS - Sapphire Technologies". Inside the window, there is a section titled "Sales Order Processing Module Options - Reservations". This section contains three options, each with a corresponding dropdown menu:

- Auto Reserve Stock During Sales Order Entry:
- Allow Partial Reservation Against Orders:
- Use Reserved Quantity Only On PL Creation:

At the bottom of the window, there is a label "Sales Order Processing Options".

### BlueStone Solutions for Business

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## Credits

SMS-SOP-PARAMETERS - Sapphire Technologies

Sales Order Processing Module Options - Credits

Allow Credit Action from Create / Amend Program  YES

Print discount details on Credit Note

Sales Order Processing Options

## Picking Lists - General

SMS-SOP-PARAMETERS - Sapphire Technologies

Sales Order Processing Module Options - Picking Lists - General

Auto- create Picking List for new Order  NO

Default Picking List Creation Optimisation  Allow Selection

Default Picking List Creation Type  Allow Selection

Calculate Free Stock During Picking List Creation  YES

Allow Automatic PL Confirm to Borrow Stock  NO

Automatic PL Confirm Mode  FIFO

Part Despatch Orders  YES

Quick Processing Defaults

1. Print <input type="checkbox"/>	4. Complete <input type="checkbox"/>	7. Consignment Note <input type="checkbox"/>
2. Confirm <input type="checkbox"/>	5. Despatch <input type="checkbox"/>	8. Invoice <input type="checkbox"/>
3. Print <input type="checkbox"/>	6. Address Labels <input type="checkbox"/>	

Auto-quick process Picking List after Create/Amend  NO

Automatically Use Quick Processing Defaults  NO

View Picking List in Original Order Sequence  YES

Prompt for use of Default Location during Confirmation  YES

Sales Order Processing Options

### BlueStone Solutions for Business

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

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

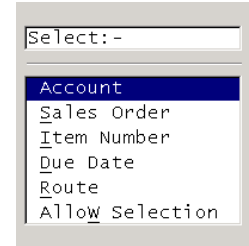
Offices in Leicester & Bristol. For all locations contact (0800) 027 3775

### **Auto create Picking List for New Order**

If set to 'YES', creates a Picking List containing Pick Lines derived from the Order Lines on a Sales Order upon creation.

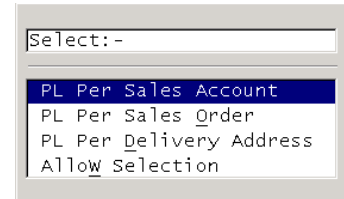
### **Default Picking List Creation Optimisation**

Will optimise the Picking List by one of the five options as selected, or alternatively 'Allow Selection' will present the user with the options and allow the choice to be made at run time.



### **Default Picking List Creation Type**

Can be set to produce a Picking List by one of the three options or alternatively allow the choice to be made at run time



### **Calculate free stock during Picking List Creation**

### **Allow Automatic PL Confirm to Borrow Stock**

### **Automatic PL Confirm Mode**

### **Part Despatch Orders**

### **Quick Processing Defaults**

Defines the number of processes the Picking List will actually go through during Quick Processing. The options are:

Print - Confirm - Print - Complete - Despatch -Address Labels - Consignment Note - Invoice

### **BlueStone Solutions for Business**

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

### **Auto quick process Picking List after Create/Amend**

If set to 'YES', affects all Picking List creation processes. This parameter is used in conjunction with the parameter 'Quick Processing Defaults' above that defines the number of processes the Picking List will actually go through.

### **Automatically use Quick Processing Defaults**

### **View Picking List in original Order sequence**

If set to 'YES' allows Sapphire to arrange the Picking List in order of the earliest Sales Order created during the View Picking List program in Enquires under SOP.

### **Prompt for use of Default Location during Confirmation**

If set to 'YES' then the user will, after selecting the Picking List, be prompted with the option to 'Use Item Default Depots / Bins'.

Selecting 'YES' will then automatically select the Depot and Bin attached to the Stock Item in Stock Control. This then hides any other Depots and Bins where the Stock Item may be stored. Selecting 'NO' simply displays all Depots and Bins that store the Stock Item attached to the Order Line.

### **BlueStone Solutions for Business**

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## Picking List - Printing

The screenshot shows a window titled 'SMS-SOP-PARAMETERS - Sapphire Technologies' with a sub-header 'Sales Order Processing Module Options - Picking Lists - Printing'. The window contains a list of 18 parameters, each with a dropdown menu. The parameters and their current values are:

Parameter	Value
Printing of Picking List optional	NO
Free Text Notes on Picking List Despatch Document	YES
Print Free Text Notes on Final Page Only (Footer)	NO
Print Batch details on Picking List Despatch Doc	YES
Show lines with zero picked quantity on Despatch Document	
Auto Print Picking List in Single Order Mode	
Print Batch details on Picking List	YES
Show Allocations by Batch or Location	Batch
ASCII Export Picking List when printed	NO
Enable Despatch Notes	YES
Picking List Printing Sequence	Order Sequence
Print Despatch Note in original Order sequence	YES
Print Invoice in original Order sequence	YES
Multiple Despatch Note / Label Printing Sequence	Pick List
Print Material Certificate with Delivery Note	NO
Print delivery address notes on Despatch Note	NO

The window title bar includes 'Line 100' and standard window controls. The bottom status bar reads 'Sales Order Processing Options'.

### Printing of Picking List optional

For organisations that do not print a Picking List for stores to select the relevant goods, the parameter 'Printing of Picking List optional' disables this option. If set to 'YES' Sapphire allows the user to decide whether or not to Print a Picking List before Confirmation. If this parameter is set to 'NO' then a Picking List must be printed before it can be confirmed.

### Free Text Notes on Picking List Despatch Document

Prompts the Despatch Note screen if set to 'YES'. Selecting 'NO' in this parameter will hide the Despatch Notes screen.

### Print Free Text Notes on Final Page Only (Footer)

### Print Batch details on Picking List Despatch Doc

Prints the Batch numbers of each Stock Item Confirmed on the Picking List if set to 'YES'. Selecting 'NO' hides these details.

### Show lines with zero picked quantity on Despatch Document

### Auto Print Picking List in Single Order Mode

### Print Batch details on Picking List

The parameter 'Print Batch Details on Picking List' if set at 'YES' enables Sapphire to add the Stock Item Batch number to the Picking List. Selecting 'NO' produces no details on the List.

### Show Allocations by Batch or Location

## BlueStone Solutions for Business

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

### **ASCII Export Picking List when printed**

Creates an ASCII file of the print out if set to 'YES'. The file is not created if set to 'NO'.

### **Enable Despatch Notes**

### **Picking List Printing Sequence**

#### **Print Despatch Note in original Order sequence**

The parameter 'Print Despatch Note in original Order sequence' if set at 'YES', allows Sapphire to arrange the Pick Lines in order that they were added to the Picking List on the actual Despatch Note. Selecting 'NO' in this field will arrange the Lines on the Despatch Note alpha numerically.

#### **Print Invoice in original Order sequence**

The Invoice will be in the same order as the Picking List if set to 'YES'. Selecting 'NO' in this field will arrange the lines on the Invoice alpha numerically.

### **Multiple Despatch Note/Label Printing Sequence**

#### **Print Material Certificate with Delivery Note**

#### **Print delivery address notes on Despatch Note**

### **BlueStone Solutions for Business**

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## Picking Lists - Invoicing

Sales Order Processing Module Options - Picking Lists - Invoicing

Update Exchange Rate During Invoicing	YES
Allow editing of Payment Due Date During Invoicing	NO
Use Sales Order Number as Invoice Number	NO
Use Order Date as Invoice Date	NO
Allow editing of 2nd invoice reference During Invoicing	YES
Invoice Rounding Mode	Line Total
Print delivery details on Invoice	YES
Print Batch Details on Invoice	NO
Print Materials Certificate with Invoice	NO
Hide Carriage During Invoicing	

Carriage Nominal - Account  CC  Dept

Sales Order Processing Options

### Update Exchange Rate During Invoicing

If set at 'YES' Sapphire will use the most recent Exchange Rate value to make calculations during Invoice creation.

### Allow Editing of Payment Due Date during Invoicing

The Payment Due By field can be influenced when the parameter is active (Set at 'YES'). The Accounting System is updated with the date and it may also be added to the Invoice through Amend Stationary and adding the field 'Payment Due By'.

### Use Sales Order Number as Invoice Number

### Use Order Date as Invoice Date

### Allow editing of 2<sup>nd</sup> invoice reference During Invoicing

### Invoice Rounding Mode

### Print Delivery details on Invoice

When set at 'YES' Sapphire will add the Customer account Delivery Details onto the Invoice.

### Print Batch Details on Invoice

### Print Materials Certificate with Invoice

When active (Set at 'YES') adds the Material Certificate to the Invoice when printing.

### Hide Carriage During Invoicing

## BlueStone Solutions for Business

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

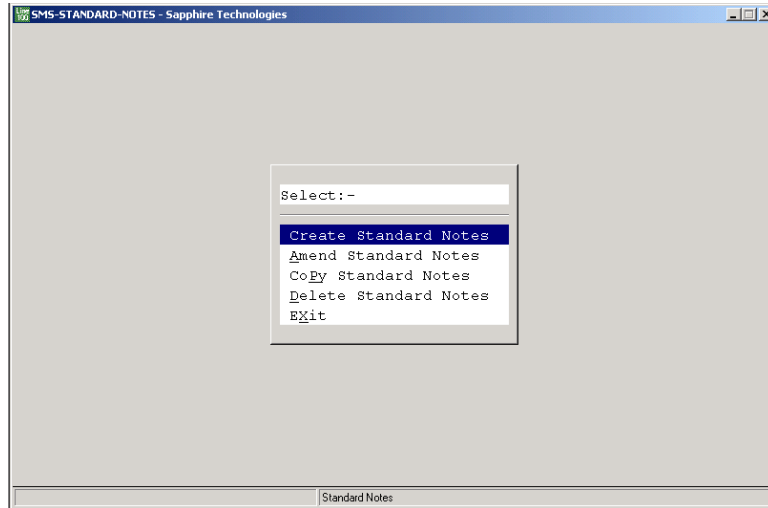
## Carriage Nominal - Account / CC / Dept

Allows a default Nominal Account to be set for the Carriage charge. If the details are entered into these fields they will automatically be entered when prompted to enter the Carriage cost.

## Standard Notes

*Sales Order Processing, Utilities, Parameters, Standard Notes*

The Standard Notes feature allows the user to enter several lines of text that can then be selectively added to the Order Acknowledgement, Picking List, Despatch Note, Invoice or the Works Orders. Each line may contain up to 60 alphanumeric characters.

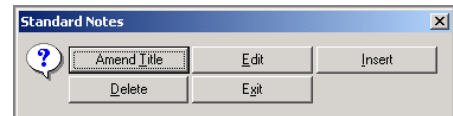
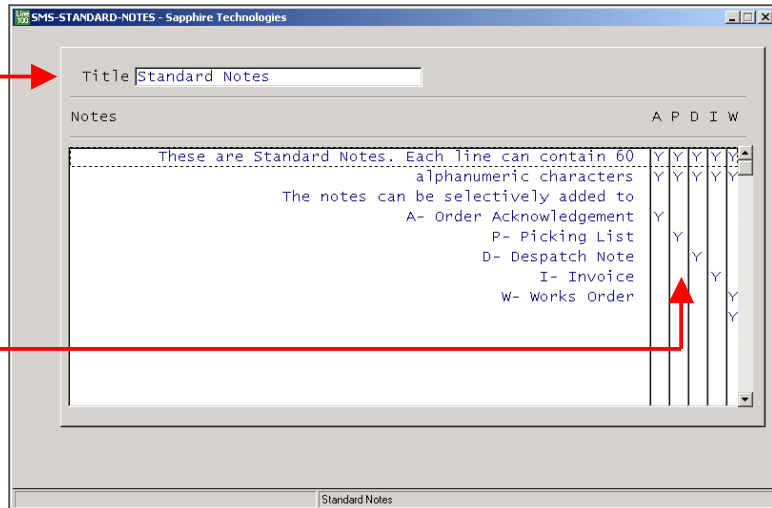


Use Create Standard Notes to define a new set of notes consisting of a Title and various Lines.

Each set of Notes can be identified easily by this Title. The Title does not need to be unique however as each set of Notes has a unique reference number which is automatically incremented

These fields are used to selectively add the individual Line as shown.

Press 'ESC' to cease entering notes and display the menu shown



## BlueStone Solutions for Business

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

**Amend Title**

Selecting this option highlights the Title field for amendment

**Edit**

The Edit function will highlight the first line allowing the user to select and amend any Line.

**Insert**

Use this option to insert a new Line indicated by the cursor

**Delete**

Deletes the line indicated by the cursor

**Exit**

Returns to the Standard Notes menu, saving the entered details

**BlueStone Solutions for Business**

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

Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## Amend Standard Notes

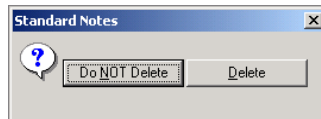
The amend option allow the user to select a Standard Note for amendment. After selecting the amend option the Notes may be selected by the Reference Number or Title. The '/' Search Facility is also available.

## Copy Standard Notes

Copies an existing note and creates a new one with the same Title but different Reference Number. When selecting this option the user is asked to select a current Standard Note entry by Reference Number or Title. The new note can then be amended

## Delete Standard Notes

Use this option to delete Notes. After selecting Delete Standard Notes the user must that select a set of Standard Notes using the Reference Number or the Title. Sapphire than displays the options



'Do Not Delete'  
'Delete'

returns to the Standard Notes menu without deletion.  
deletes the Notes then returns to the Standard Notes menu.

## Exit

Selecting Exit returns Sapphire to the Parameters menu.

### BlueStone Solutions for Business

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

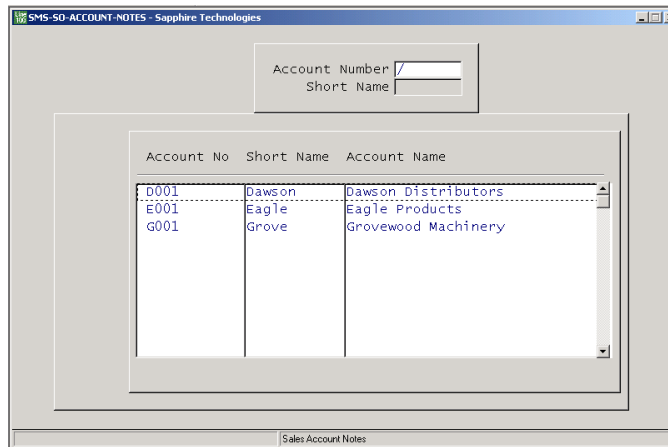
Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

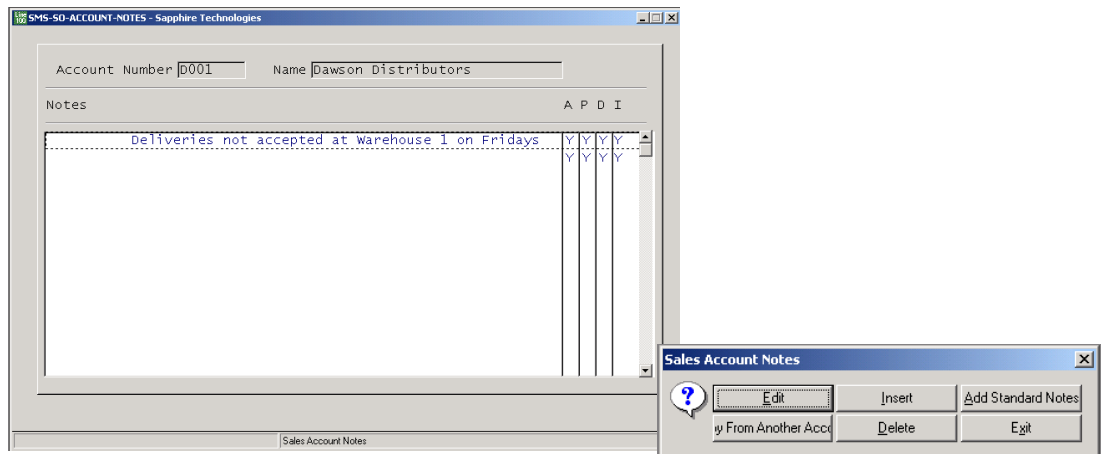
## Sales Account Notes

Sales Order Processing, Utilities, Parameters, Sales Account Notes

This parameter allows access to the Sales Account Notes held in the Sales Ledger. When selecting this option the user must select a Sales Account.



After Sales Account selection the associated Notes are displayed.



Press 'ESC' to display the menu

### Insert

Used to Insert a new Line. After entering text the Line may be selectively added as for the Standard Notes

### Add Standard Notes

This option adds selected Standard Notes to the Sales Accounts Notes. Selected Standard Notes appear on the Sales Account Notes and will be printed as Sales Account Notes.

### Copy From Another Account

The user is asked to select another Sales Account. After selection any Notes are copied to the first Account.

### Delete

Removes the selected Line.

### Exit

Exit to the Parameters menu.

## BlueStone Solutions for Business

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

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

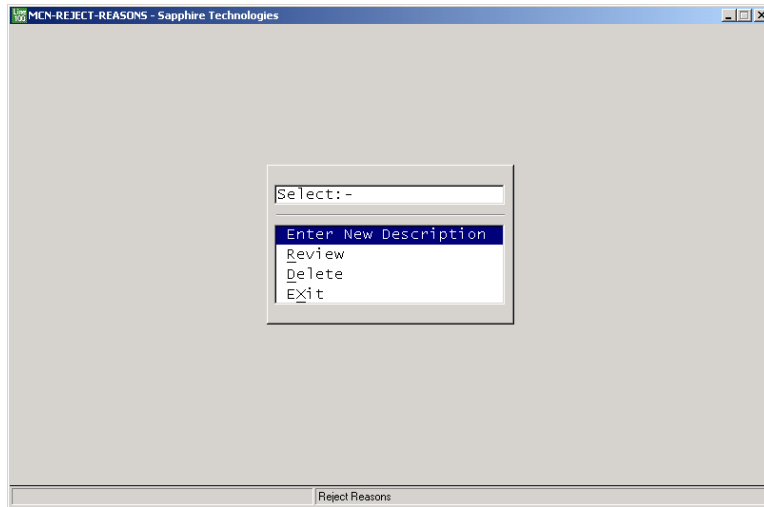
Offices in Leicester & Bristol. For all locations contact (0800) 027 3775

## Reject Reasons

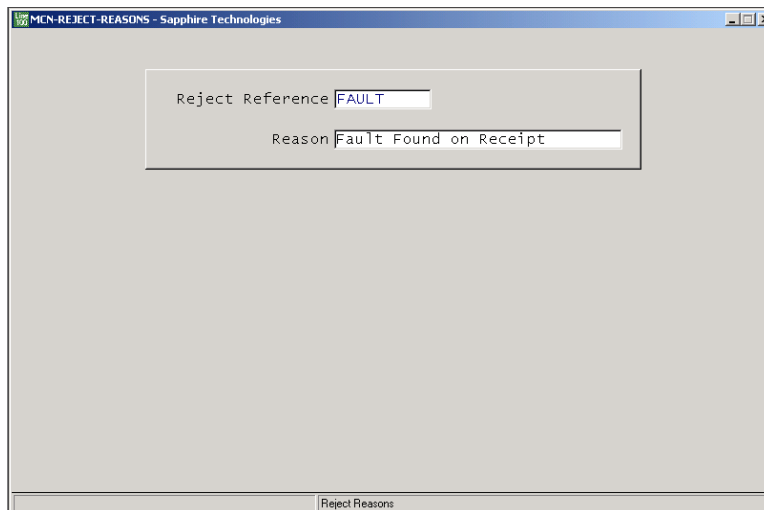
*Sales Order Processing, Utilities, Parameters, Reject Reasons*

The Reject Reasons are predefined options used when creating a Credit Line.

Note: For further information regarding the implementation of Reject Reason, please read the section entitled Credit Line.



The Enter New Description option displays two fields.



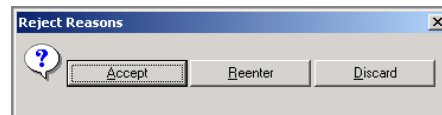
### Reject Reference

Enter the Reject Code into this field. (up to 10 alphanumeric characters)

### Reason

Enter the description into this field. (up to 30 alphanumeric characters)

Press Return and Sapphire displays the options



Accept Select Accept to save the above details.

Reenter Select Reenter to amend any details.

Discard Select Discard to return to the Reject Reasons menu.

## BlueStone Solutions for Business

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

**Review**

Use this option to review and amend any Reject Reason. The Search Facility is available if the Reference is not known.

**Delete**

Select Delete to completely remove the Reject Reason. When selecting Delete the user is asked to select the correct entry. After selection Sapphire displays the following options:

**No Deletion** Does not delete selection.

**Delete** Deletes the selection.

**Exit**

Return to the Parameters menu.

**BlueStone Solutions for Business**

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

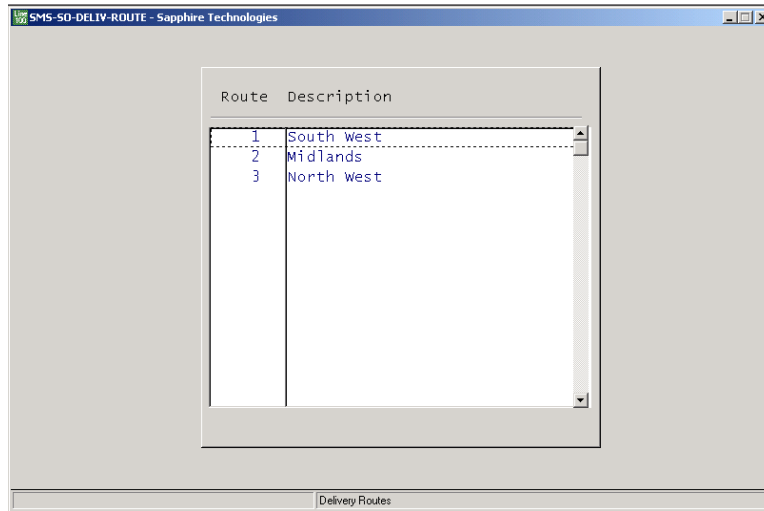
Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## **Delivery Routes**

*Sales Order Processing, Utilities, Parameters, Delivery Routes*

This option is used to enter, amend or delete Delivery Routes. A Delivery Route consists of a Reference Route number and a Description. These Routes can then be added to Delivery Addresses created from another program.



### **Route**

A unique identifier number for each entry, and can be up to 3 alphanumeric characters.

### **Description**

Use this field to describe the Delivery Route. This field may contain 30 alphanumeric characters.

Delete the Route reference to remove the complete route entry.

To exit press the 'Esc' (Escape) key

## **BlueStone Solutions for Business**

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

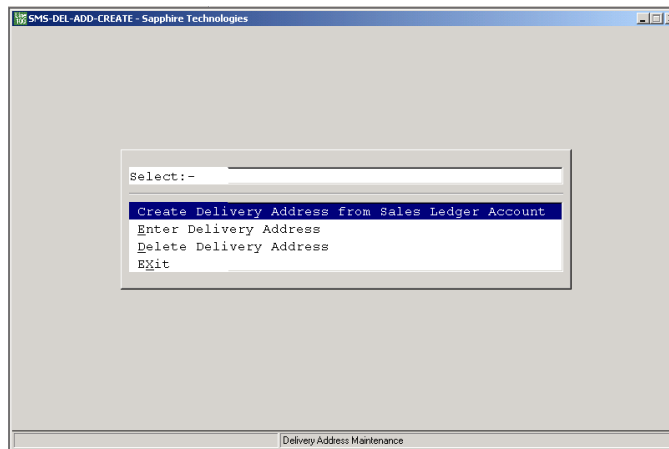
Email: [sales@bluestone-solutions.co.uk](mailto:sales@bluestone-solutions.co.uk) [www.bluestone-solutions.co.uk](http://www.bluestone-solutions.co.uk)

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

## **Create/Delete Delivery Addr**

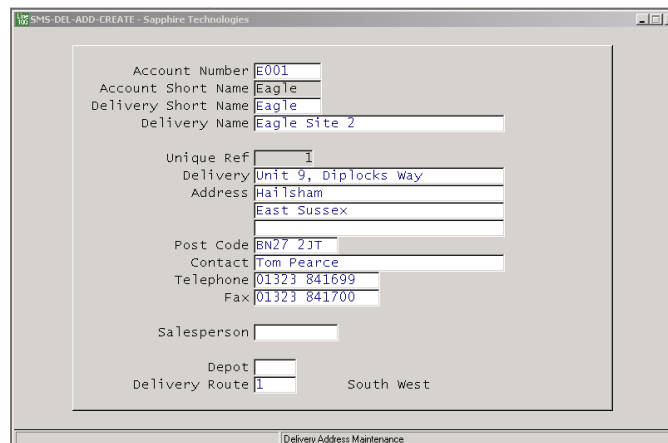
*Sales Order Processing, Utilities, Parameters, Create/Delete Delivery Addr*

This option allows the user to define several Delivery Addresses for each Sales Account. The selected Delivery Address is then added to the Sales Order Header during the creation of an order.



## **Create Delivery Address From Sales Ledger Account**

This option creates a Delivery Address from a Sales Ledger Account, automatically defaulting the details into the appropriate fields in the Delivery Address screen.

A screenshot of a software window titled 'SMS-DEL-ADD-CREATE - Sapphire Technologies'. The window displays a form with the following fields and values: Account Number: E001; Account Short Name: Eagle; Delivery Short Name: Eagle; Delivery Name: Eagle Site 2; Unique Ref: 1; Delivery: Unit 9, Diplocks Way; Address: Hailsham; East Sussex; Post Code: BN27 2JT; Contact: Tom Pearce; Telephone: 01323 841699; Fax: 01323 841700; Salesperson: (empty); Depot: (empty); Delivery Route: 1; South West. At the bottom of the window, there is a status bar that reads 'Delivery Address Maintenance'.

### **Account Number**

The new Delivery Address will be related to the Sales Account entered into this field.

### **Account Short Name**

Default Short Name for the Sales Account.

### **Delivery Short Name**

Use this field to enter a brief reference for the Delivery Address. This field may contain 8 alphanumeric characters. The value entered should be unique to the Sales Account (Sapphire displays a warning otherwise) but a duplicated value may be entered if required.

## **BlueStone Solutions for Business**

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

### Delivery Name

A 30 character alphanumeric field used to enter a name for the Delivery Address.

### Unique Ref

This reference number is unique to the Sales Account and is automatically incremented when creating new details.

### Delivery Address

The Delivery Address consists of four fields that may contain 30 alphanumeric characters.

### Post Code

Delivery address post code

### Contact

This field may contain 30 alphanumeric characters used to enter a related Contact Name.

### Telephone

15 character alphanumeric field used to record a related telephone number.

### Fax

15 character alphanumeric field used to record a related telephone number.

### Salesperson

The user may only enter a predefined Salesperson into this field. Simply enter the value or use Search. It is not mandatory to enter a value. (please see Sales Representative section for details).

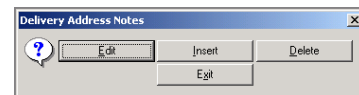
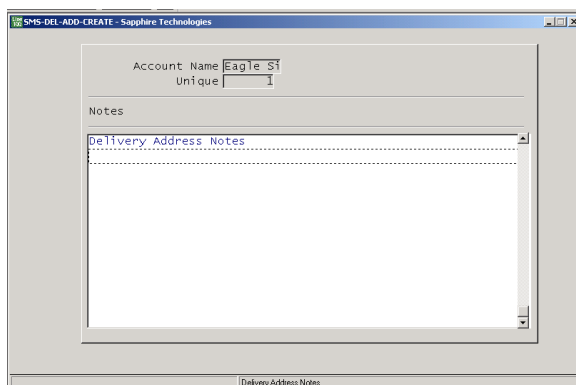
### Delivery Route

The user may only enter a predefined Delivery Route into this field. Simply enter the value or use Search. It is not mandatory to enter a value. (please see Delivery Route section for details).

- |                |   |
|----------------|---|
| <b>Accept</b>  | Saves the Route and display Notes option.                             |
| <b>Reenter</b> | Allows the user to amend the details entered.                         |
| <b>Discard</b> | Deletes the details and returns to Delivery Address Maintenance menu. |

After accepting the details the following options are available:

**Notes** The Notes options give the user access to the Delivery Route Notes. Each line can be up to sixty alphanumeric characters.



The exit menu has the following options

- |               |   |
|---------------|---|
| <b>Edit</b>   | Allows the user to edit the selected Line.        |
| <b>Insert</b> | Inserts a Line at the cursor.                     |
| <b>Delete</b> | Deletes the Line indicated by the cursor.         |
| <b>Exit</b>   | Exit to to the Delivery Address Maintenance menu. |

### BlueStone Solutions for Business

Unit A, Tayside Software Centre, Dundee Technology Park, Dundee, DD2 1TY  
Tel: 0870 086 9055 Fax: 0870 086 9056 Email: sales@bluestone-solutions.co.uk www.bluestone-solutions.co.uk

### **Enter Delivery Address**

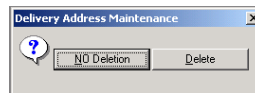
This option presents the user with a blank form to enable all details to be entered instead of defaulting from the Sales Account.

### **Delete Delivery Address**

Use the delete option to completely remove the Delivery Address. Sales Orders that use the Delivery Address will continue to hold the details.

When selecting this option the user must select a Delivery Address by using the search facility in the Account Number field.

Select the address to be deleted by scrolling to the line and pressing Return. The options are then given to Delete or NO Deletion



### **Amend Delivery Address**

Used to amend a previously entered Delivery Address. When selecting this option the user must select a Delivery Address by using the search facility in the Account Number field.

Sales Orders that already use the Address will continue to use the Delivery Address before amendments.

### **Customer Details**

Please see the separate datasheet

### **Discount Rules**

Please see the separate datasheet

### **Price Lists**

Please see the separate datasheet

### **Sales Representatives**

Please see the separate datasheet

### **Sales Area**

Please see the separate datasheet

### **Language Tables**

Please see the separate datasheet

### **Customer Languages**

Please see the separate datasheet

## **BlueStone Solutions for Business**

Unit A, Tayside Software Centre, Dundee Technology Park, Dundee, DD2 1TY  
Tel: 0870 086 9055 Fax: 0870 086 9056 Email: sales@bluestone-solutions.co.uk www.bluestone-solutions.co.uk