



Sales Order Processing

Enhancements

Contents

| | |
|---|----------|
| Installation via the Internet | 3 |
| Enhancements | 4 |
| Default Customer Delivery Address | 4 |
| Order or Despatch Progress..... | 5 |
| Data Entry Tip | 5 |
| Convert Screens – Filter by Customer Group | 6 |
| Convert Sales Order screen – displays expected Delivery Date | 6 |
| Despatch Notes - Editing..... | 7 |
| Report Library – Create Reports..... | 7 |
| Items Inspector – Ability to add Category, Group and/or Variety.. | 8 |
| Report Library – Copy..... | 8 |
| Sales Credit Notes..... | 8 |
| Finished Customers | 8 |
| Re-export Files to Business Manager | 8 |
| VAT Country Codes - Croatia | 8 |
| Did you know?..... | 9 |
| Farmplan Software Support | 9 |
| Twitter..... | 9 |

Installation via the Internet

- Before you start, ensure that you have up-to-date backups of your Sales Order Processing data.
- Click on the link supplied to 'Install Sales Order Processing'.
- Make sure that the Sales Order Processing program is closed.

It is important that you do not have any other applications open while installing the update (other than any anti-virus software that is normally running in the background).

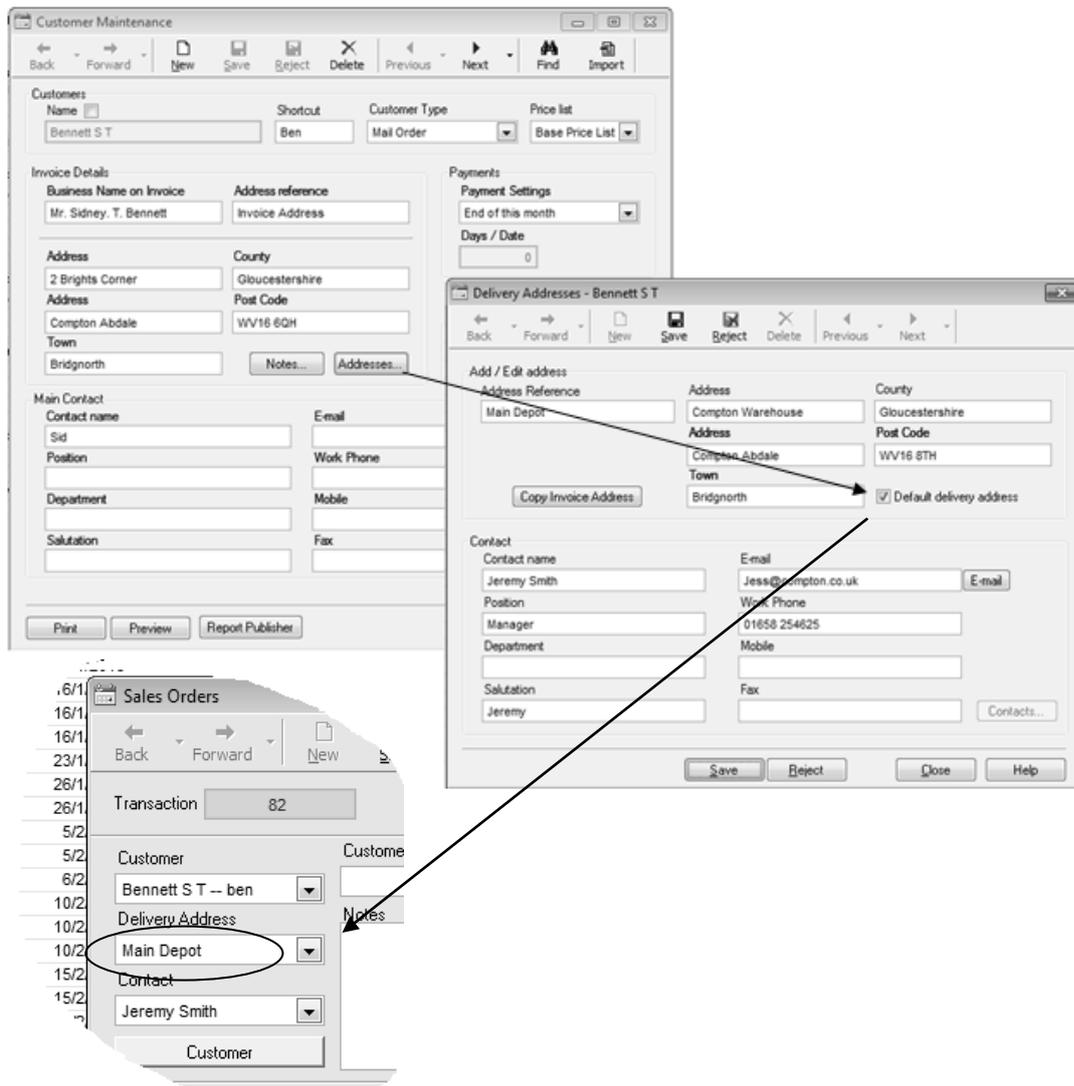
- Follow the on-screen instructions to '**Install Sales Order Processing**'. The exact procedure will vary according to the version of Windows and browser that you use but you will download a file called **setup.exe**, supplied by Reed Business Information (our parent company), which should then be 'Run'.
- If Windows SmartScreen (a green warning message) appears to block the installation, click on **More Information** and then **Run Anyway**.
- A black box will appear on your screen during the installation. Ignore it – it will disappear when the installation is complete.
- When the installation is complete go into the program – your data will be automatically updated to run with the new version (1.43) of the program.
- Remember to update every machine that uses Sales Order Processing.

Enhancements

Please note that full details of each change to this version of the program can be found in the option **Help – Introduction - Enhancements**

Default Customer Delivery Address

If multiple delivery addresses have been set up for a customer, one of them can now be marked as the default.

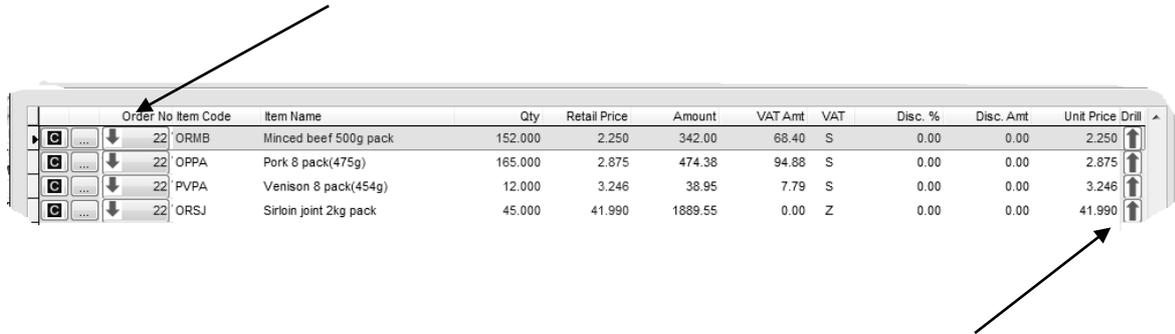


The default delivery address will be automatically presented during data entry but can be changed to an alternative address if applicable. If no default is set, the invoice address will be shown.

Order or Despatch Progress

As well as being able to see where a despatch or sale invoice has been created from, you can now see where each item has been converted to so that you can follow its progress.

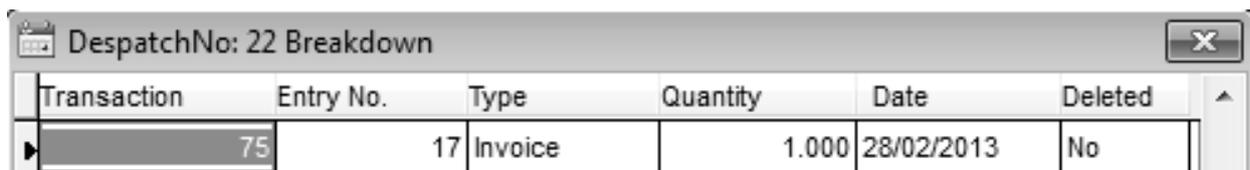
↓ For example if you are looking at a Despatch Note, you can drill down to the originating order of each line:



The screenshot shows a table with columns: Order No, Item Code, Item Name, Qty, Retail Price, Amount, VAT Amt, VAT, Disc. %, Disc. Amt, Unit Price, and Drill. The 'Drill' column contains up and down arrows for each row. An arrow points from the text above to the 'Drill' column header.

| Order No | Item Code | Item Name | Qty | Retail Price | Amount | VAT Amt | VAT | Disc. % | Disc. Amt | Unit Price | Drill |
|----------|-----------|------------------------|---------|--------------|---------|---------|-----|---------|-----------|------------|-------|
| 22 | ORMB | Minced beef 500g pack | 152.000 | 2.250 | 342.00 | 68.40 | S | 0.00 | 0.00 | 2.250 | ↑ |
| 22 | OPPA | Pork 8 pack(475g) | 165.000 | 2.875 | 474.38 | 94.88 | S | 0.00 | 0.00 | 2.875 | ↑ |
| 22 | PVPA | Venison 8 pack(454g) | 12.000 | 3.246 | 38.95 | 7.79 | S | 0.00 | 0.00 | 3.246 | ↑ |
| 22 | ORSJ | Sirloin joint 2kg pack | 45.000 | 41.990 | 1889.55 | 0.00 | Z | 0.00 | 0.00 | 41.990 | ↑ |

↑ You can now also see which Sales Invoice was created when each item was converted using the 'drill up' button.



The screenshot shows a window titled 'DespatchNo: 22 Breakdown' with a table containing transaction details. The 'Drill' column has an up arrow pointing to the first row.

| Transaction | Entry No. | Type | Quantity | Date | Deleted |
|-------------|-----------|---------|----------|------------|---------|
| 75 | 17 | Invoice | 1.000 | 28/02/2013 | No |

In a similar way, you can also look at a converted item on a sales order and see which despatch note(s) it was included on.

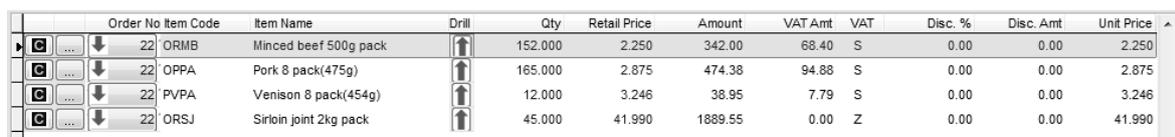
Drill up and down arrows have been included on the column headings.

Data Entry Tip



Did you know that you can rearrange the column headings on the data entry screens?

Just hold down the left hand mouse button and drag the column that you wish to move. You may wish to move the 'drill up' button to a more convenient location.

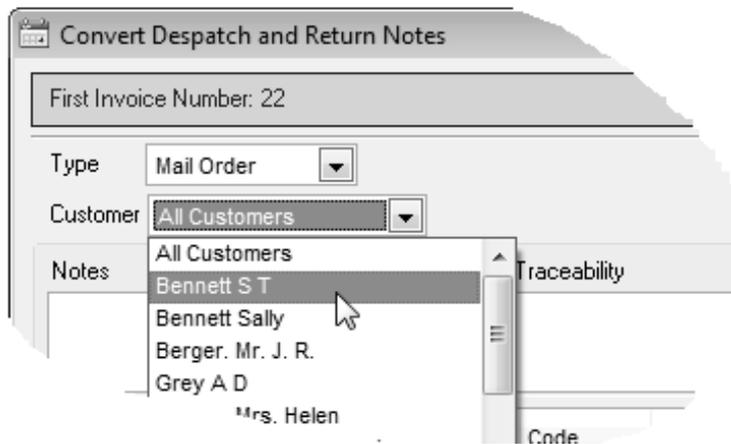


The screenshot shows the same table as before, but the 'Drill' column has been moved to the left of the 'Qty' column.

| Order No | Item Code | Item Name | Drill | Qty | Retail Price | Amount | VAT Amt | VAT | Disc. % | Disc. Amt | Unit Price |
|----------|-----------|------------------------|-------|---------|--------------|---------|---------|-----|---------|-----------|------------|
| 22 | ORMB | Minced beef 500g pack | ↑ | 152.000 | 2.250 | 342.00 | 68.40 | S | 0.00 | 0.00 | 2.250 |
| 22 | OPPA | Pork 8 pack(475g) | ↑ | 165.000 | 2.875 | 474.38 | 94.88 | S | 0.00 | 0.00 | 2.875 |
| 22 | PVPA | Venison 8 pack(454g) | ↑ | 12.000 | 3.246 | 38.95 | 7.79 | S | 0.00 | 0.00 | 3.246 |
| 22 | ORSJ | Sirloin joint 2kg pack | ↑ | 45.000 | 41.990 | 1889.55 | 0.00 | Z | 0.00 | 0.00 | 41.990 |

Convert Screens – Filter by Customer Group

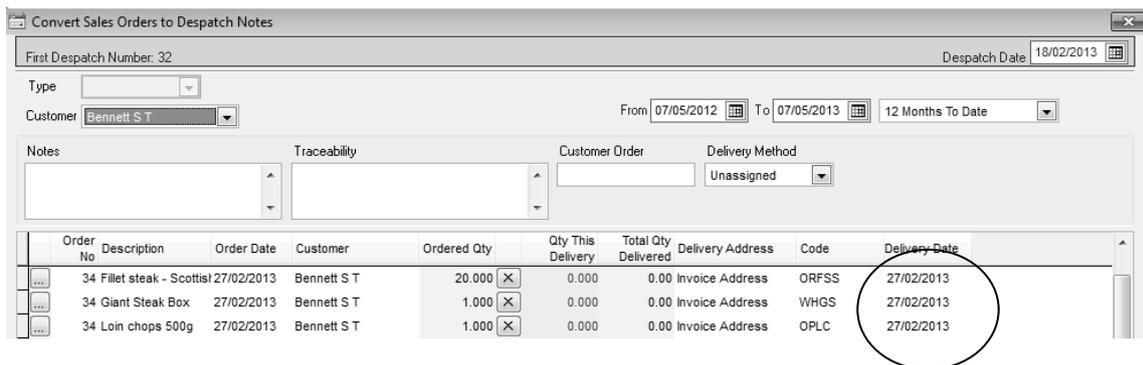
A new filter has been added to both 'Convert' screens ((i.e. Orders to Despatches and Despatches to Invoices) to filter the list of customers and transactions displayed by Customer Type.



If you wish to see all customers and unconverted transactions, leave the Type unselected.

Convert Sales Order screen – displays expected Delivery Date

This screen now shows the expected delivery date allocated for each item as well as the entry date.



| Order No | Description | Order Date | Customer | Ordered Qty | Qty This Delivery | Total Qty Delivered | Delivery Address | Code | Delivery Date |
|----------|-------------------------|------------|-------------|-------------|-------------------|---------------------|------------------|-------|---------------|
| 34 | Fillet steak - Scottis! | 27/02/2013 | Bennett S T | 20.000 | 0.000 | 0.00 | Invoice Address | ORFSS | 27/02/2013 |
| 34 | Giant Steak Box | 27/02/2013 | Bennett S T | 1.000 | 0.000 | 0.00 | Invoice Address | WHGS | 27/02/2013 |
| 34 | Loin chops 500g | 27/02/2013 | Bennett S T | 1.000 | 0.000 | 0.00 | Invoice Address | OPLC | 27/02/2013 |

Again the column headings can be dragged to an alternative position if required.

Despatch Notes - Editing

If you edit a Despatch Note that has been created from a Sales Order, you may want one of 2 things to happen if you subsequently want to reduce the quantity despatched.

Either:

- Reinstates the balance as outstanding on the Order so that it is available for despatching at a later date. This is the default behaviour of the program and how it is currently treated.

OR/

- Assume that the Order is still finished and the balance is not to be despatched in the future. Editing the quantity will not affect the originating sales order.

If you wish to apply the second option when you edit a Despatch Note, go to **Tools – Options** and remove the tick from '**Edit Despatch to Affect Originating Order**'.

NB – Sales Invoices. As it is not possible to part convert a despatch item to an invoice, editing the amount on a Sales Invoice will not affect the quantity or status of the originating Despatch Note.

If an item is deleted from a Sales Invoice it will also not affect the Despatch Note which will remain converted. However the new 'drill up' option from the Despatch Note will indicate if this item has been deleted.

Full rules for editing and cancelling entries can be found in the **Help** option within the program.

Report Library – Create Reports

The option to create and edit report within the Report Library has now been extended to the Invoice Manager level of the program as well as the full Sales Order Processing option. An easy to use Wizard will guide you through the process of creating a new report. If you want to edit an existing report we recommend that you copy it first.

More details can be found within the **Help** option in the program.

Items Inspector – Ability to add Category, Group and/or Variety

The Detailed Items Inspector report normally just displays the Product Description on the report. It is now possible to also add the Category, Group and/or Variety to this report layout by using the **Report Publisher – Edit** option.

Use the expression for the appropriate field:

- Curitems.category
- Curitems.group
- Curitems.variety

NB these columns will also now appear on the exported Excel version of the report.

Report Library – Copy

To copy an existing report within the Report Library – for example before you make any changes, highlight it from the list and click on the new 'Copy' button.

Sales Credit Notes

These now display the due date as well as the entry date using the payment terms set up against each customer.

Finished Customers

The customer selection box on the Convert screens no longer display finished customers.

Re-export Files to Business Manager

Previously exported files are now listed in chronological order with the latest at the top of the list.

VAT Country Codes - Croatia

Croatia has now been added to the list of available EC countries using the **HR** prefix. If you have any Croatian customers please let us know so that we can make a small change to Business Manager for you.

Did you know?

Tools – Options contains several settings that might improve the way that Sales Order Processing works for you.

For example:

- Turn on grid lines to make it easier to read the information displayed on the front page or in data entry
- Reduce the size of your emailed documents by setting 'PDF export to include font' to No
- Include or exclude finished customers and products in data entry.



Default Screen on Entry

Do you want to see the Sales Orders as the first screen when you go into the program? Maybe you would rather see the Invoices? Right click on the Side Bar to choose your default screen display.

Farmplan Software Support

Please contact the Farmplan Software Support for help with operating the program either by telephoning **01594 545022** or emailing support@farmplan.co.uk

Alternatively visit our website at www.farmplan.co.uk for the most up to date version of **Frequently Asked Questions**.

Twitter

Why not follow Farmplan on Twitter? We regularly post current news and advice on topical issues relating to our programs.



Farmplan Computer Systems
Alton House
Alton Road
Ross-on-Wye
Herefordshire
HR9 5BP

Phone: **01594 545011**
Fax: **01594 545012**
www.farmplan.co.uk

support@farmplan.co.uk

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