

Sales Order Processing Transaction Desktop Evaluation Release

Service pack ZS60_000027_000 introduces the new Transaction Desktop for Global 3000 Sales Order Processing.

Important Note: The version of the SOP Transaction Desktop option included in this service pack is for reseller evaluation only and cannot be used at end user sites. At the end of the evaluation period a final version of the Transaction Desktop will be released, for general use, in a subsequent service pack. Please report any problems with, or suggestions for, the SOP Transaction Desktop to the Hotline using the On-Line Support Evaluation Web form (<http://www.global3000.com/eval.htm>) clearly stating either "SO900" or "Transaction Desktop" in the problem section of the form.

The Transaction Desktop is fully compatible with the traditional version of Global 3000 Sales Order Processing Transaction Entry. It can be activated on a per operator basis and is designed to minimise retraining overheads and facilitate take-up by sites already using Global 3000 Sales Order Processing.

In addition to the operating advantages inherent in open desktop operation, the new format introduces the following new features not provided by the traditional transaction entry dialogue:

- Individual desktop profiling for each operator;
- Creation of new customer accounts directly from the desktop;
- Customer find incorporating latest address & post code look-up;
- Entry of different transaction types without leaving the desktop;
- Access to customer, transaction and product enquiries at any time without leaving the desktop;
- Created by and last amended by operator information added to header details;
- Product find to aid locating products during line entry;
- Price, pricing unit and line value displayed for each line in the scrolled section of the desktop;

- Minimal dialogue input during initial transaction and transaction line entry, items are only prompted for in cases where a default is not available.

The service pack also supplies a new version of the Sales Order Processing menu file, SO-Menus, which includes a Transaction Desktop option in the main menu.

A Brief Overview of the Transaction Desktop

The transaction desktop provides an open friendly work space in which to enter and amend sales orders, quotations, invoices or credit notes for Global 3000 Sales Order Processing.

The desktop consists of the following operating areas:

- **Transaction Details Panel** - Located at the top of the window, this panel becomes active when you first open the desktop and when you close a transaction (via the 'Finish' button) without leaving the desktop. It identifies the customer's account and the transaction being entered or amended and provides up to date totals for the transaction.
- **Transaction Line List** - Located directly below the transaction details panel, this scrolled list of lines on the transaction lets you add new lines to the transaction and amend or delete existing lines, subject to status. (e.g. invoiced order lines can't be changed or removed.)
- **Line Details Panel** Located directly below the scrolled list, this panel of three boxes provides detailed information on quantities, values and code settings for the line you've currently selected in the transaction line list.

The bottom of the desktop contains three banks of control buttons:

- the **Function bank** providing a handy combination of features used across the desktop;
- the **Transaction bank** providing access to the different groups of information held for the current transaction;
- the **Line Details bank** providing access to the comprehensive range of information held for each transaction line.

The transaction desktop was specifically designed to meet individual operating needs through its ability to record data processing preferences onto each operators own **desktop profile** which it brings into effect automatically when activated using their operator-id. Desktop profiles are simple to set up and update and offer operators a real opportunity to reduce their workload by using preset defaults and responses to optimise keyboard operation.