

# OPUS

**ORDER PROCESSING UTILITY SOLUTIONS**

*Sales Order Notifications*



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## 1. SOP Notifications

OPUS includes a number of notification features that can warn the user if an order line has not reached a minimum margin level, the order as a whole has not reached a set minimum value, and whether carriage is included as an item. The user can also set a 'current message' which can automatically be transferred to all new order headers.

### 1.1 Minimum Margins

A global minimum margin level may be set via the SOP Utilities Set Options form and the OPUS tab. If this is set, and changing any of an order-line quantity, discount, or selling price brings the margin below the set minimum level, the user is asked if they wish to accept the order or not. If the user selects to accept the order despite the margin going below the minimum value, the margin is highlighted as white text on a red background.

The screenshot shows the 'Set Options' dialog box with the 'OPUS' tab selected. The 'SOP Notifications' section contains the following fields and options:

- Min Margin % : 20.00
- Min Order Value : 100.00
- Carriage Code : SHIP01
- Use Sales Code for Carriage Code
- Use Stock Code for Carriage Code

The 'SOP Utilities' section contains:

- Edit Cost Price

The 'Default History Seq' section contains:

- Product
- Date

Figure 1 – SOP Set Options showing the Notifications options

**New Order Details : ADA0001 - Adams Light Engineering Ltd**

General Memo

Reference : CMAT044 Warehouse : MAIN In Stock : 183 P.Orders : 60

Description : Car Mat - Smallsh Qty : 1 Factor :

Analysis : ACCE01 VAT : 1 Sell : 12.00 Line Disc : 20.00 Ext : 9.60

Job Date : // Cost inc. LC : 7.80 Margin %: 18.75 Profit : 1.80

Job Ref : Due : 06/02/2020 Priority : 1  W/O  P/O

Project : Department :  Costing Analysis

**Figure 2 – Minimum Margin Warning**

Within Stock Category maintenance the global minimum margin percentage can be overridden. This provides additional flexibility by having multiple percentage settings.

**Categories : ACC - Accessories**

General List

Code: ACC

Description: Accessories

Goods In :

Goods Out :

Stock :

BOM WIP

Mymnt :

BOM WIP :

Transfers In :

Transfers Out :

Min Margin % : 25.00 Set to zero to use value set in SOP options

**Figure 3 – Setting the Minimum Margin in Stock Categories**

### 1.2 Minimum Order Value

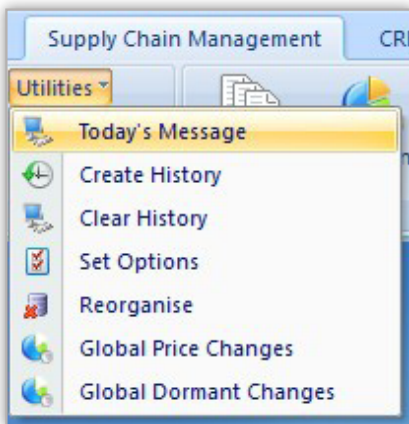
A minimum order level may be set via the SOP Utilities Set Options form. Upon saving an order, if a minimum-order level has been set and the order total is less than set amount the user is notified and asked to accept the order or not.

### 1.3 Carriage Charged

If a carriage code has been entered in the Set Options form, all items in the order are checked upon saving to ensure that at least one item has the designated carriage code. If not found, the user is warned "Carriage has not been charged. Accept the order?" and the user has the choice of accepting the order or not. The carriage code can either be a Stock Code or Sales Code.

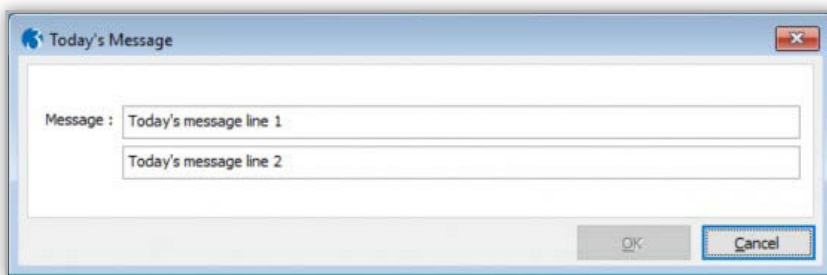
If a carriage order line is found but has a zero (or negative) value, the user will be asked if they wish to accept the order.

## 1.4 Daily Document Message



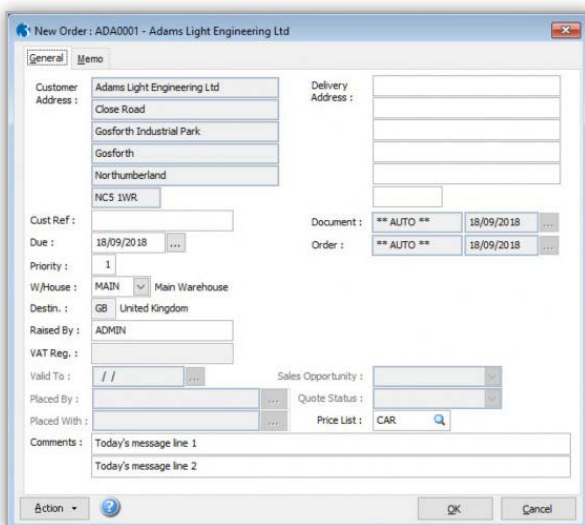
**Figure 4 – SOP (Invoicing) Utilities menu**

This can be accessed from the 'Today's Message' option from the SOP or Invoicing Utilities menu.



**Figure 5 – Today's Message entry form**

Up to 2 lines of text may be entered, each containing up to 75 characters. When a new order is raised, by default these values are inserted by default into the comments fields at the bottom of the order form, and can be overwritten if required. The saved comments can also be displayed on any report which uses data from the header table.



**Figure 6 – SOP Header form with 'Today's Messages' populating comments fields**

## 2. File Formats

### 2.1 Sales History

HSOP

IT_ACCOUNT	C	8	Account
IT_TRREF	C	10	Reference
IT_DATE	D	10	Date
IT_DOC	C	10	Document
IT_RECNO	N	7	Line Number
IT_STOCK	C	16	Stock Reference
IT_QUAN	N	9	Quantity
IT_PRICE	N	10	Price
IT_EXVAT	N	10	Ex Vat
IT_DISC	N	6 2	Discount Pct.
IT_COST	N	10	Cost Price
IT_DISCVAL	N	10	Discount Value
IT_DOCSTAT	C	1	Document Status
IT_ID	N	10	Transaction ID
IT_FCURRE	C	3	Foreign Currency
IT_FCRATE	N	11 6	FC Exchange Rate
IT_FCDEC	N	1	FC Dec.pl.
IT_FUNDEC	N	1	Unit. dec.pl. power

### 2.2 Purchase History

HPOP

DO_ACCOUNT	C	8	Account
DO_DCREF	C	10	Reference
DO_RECSTAT	D	10	Received
DO_CNREF	C	16	Stock Reference
DO_DESC	C	40	Description
DO_DCLINE	N	7	Line Number
DO_REQQTY	N	9	Quantity
DO_PRICE	N	12	Price
DO_ID	N	10	Transaction ID
DO_CURRCY	C	3	Foreign Currency
DO_DPLACE	N	1	FC Dec.pl.
DO_FUNDEC	N	1	Unit. dec.pl. power

### 2.3 SOP Options

IPARM

MINMARG	N	7	2	Minimum Margin
MINORDER	N	12	1	Minimum Order Value
CARRCODE	C	16		Carriage Code
DEFNARR1	C	75		Default SOP Narrative 1
DEFNARR2	C	75		Default SOP Narrative 2
EDITCOSTPRICE	L	1		Edit Cost Price
IP_DEFHISTSEQ	N	2		Default History Sequence
IP_CRCCTYPE	N	1		Carriage Code Type

### 2.4 Customer Products

ISPROD

IS_ACCOUNT	C	8		Customer Account
IS_CNREF	C	16		Our Stock Ref.
IS_CUSREF	C	32		Customer Stock Ref.
IS_CUSDESC	C	40		Description
SQ_CRDATE	D	8		Date Created
SQ_CRTIME	C	8		Time Created
SQ_CRUSER	C	8		User Created
SQ_AMDATE	D	8		Date Amended
SQ_AMTIME	C	8		Time Amended
SQ_AMUSER	C	8		User Amended
IS_MEMO	M	10		Comments
IS_AUTO	L	4		Invoice Memo Auto

### 2.5 Other Table Additions

CCATG	CATMARG	N	7	2	Minimum Margin
IHEAD	IH_PRCLST	C	8		Price List
CLIST	CL_SHOWINLIST	L	1		Incl. in price-selection lists
DPARM	DP_BATCHORDIN	L	1		Incl. unit vol. in wt.calc
	CLUNITV				
	DP_BATCHORDS	L	1		Calculate batch order weight
CDETL	CD_SOPNOTE	C	20		SOP Note
	CD_FXDPRC	L	1		Fixed Price?
ITRAN	IT_SOPNOTE	C	1		SOP Note





