



# SOP CONFIGURATION MANUAL

Version 1.0

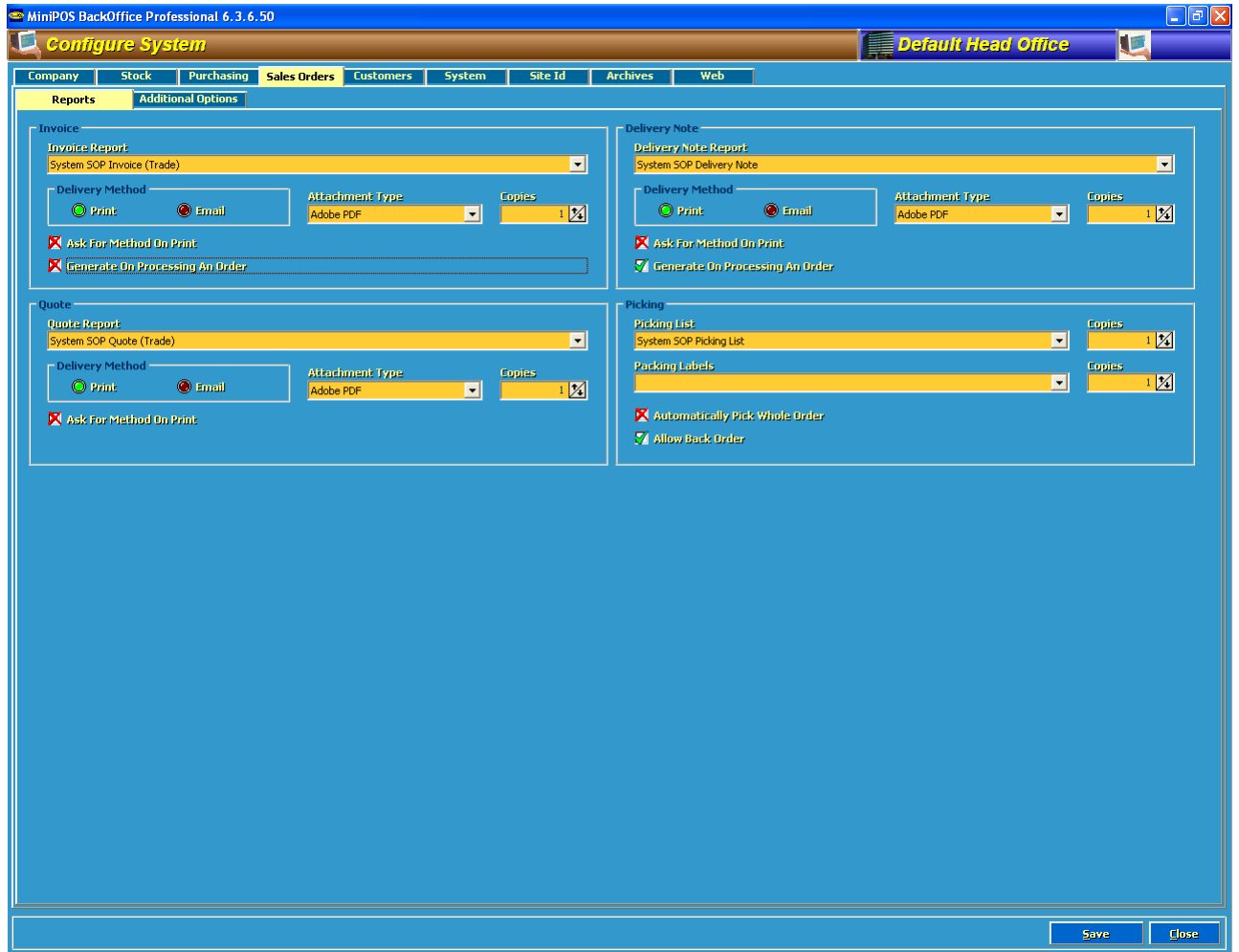
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## SOP Configuration

There are a number of ways to configure MiniPOS® SOP to suit your particular business requirements. This section will describe how to set the various options that control how the MiniPOS® SOP system works and the type of printed output generated.

To make changes to the MiniPOS® SOP configuration settings, navigate to *System / Configure System / Sales Orders* screen:



There are two *Tabs* on the Sales Orders Configuration screen, *Reports* and *Additional Options*.

### Reports Tab

This page allows you to configure which type of report (Invoice, Delivery Note, Quote and Picking List) is output for the various stages of the Sales Order Process and how many copies are required.

## Invoice Options

If you wish to print invoices for sales orders processed, you can select the type of invoice printed and when the invoice should be output. You can assign a specific invoice report to customers in the MiniPOS® Customer Database. If a specific invoice report has been assigned to a customer then the SOP default invoice will be ignored. You can prevent invoice printing if for example you operate a **tele-sales** facility where orders are paid for by cash or credit card and no invoice output is required.

### Invoice Report:

Click on the **drop-down button** to display a list of reports and select the invoice type that you require as the default SOP invoice. *(There are pre-configured SOP System Reports to choose from which can show prices inclusive or exclusive of VAT to be used for standard or trade sales processing. Please contact your dealer if you require a specific invoice layout - this maybe chargeable. Only SOP System Reports created under the **Local** section of the reports designer will display in the above list.)*

The invoice report selected will be used for all sales orders unless a specific invoice report has been assigned to a customer in the MiniPOS® Customer Database.

If the **Invoice Report** field is left or set to blank, then when an invoice is required to be printed, a pop-up box will appear with a list of SOP System Reports for you to choose to print.

### Delivery Method:

You choose to either print the invoice generated from sales orders or email direct to your customers. If you opt to email the invoice you will be asked if you also need a printed copy.

**Print** - If you select this option, invoices will be printed.

**Email** - This option will email invoices to the email address set for the customer in the MiniPOS® Customer Database. The format that the invoice will be emailed in is set in the **Attachment Type** field. When invoices are to be emailed you will also have the option to print a hard copy if required.

*(To email customers, you must configure the **Direct Email Support** settings under **System / Configure System / System Tab.**)*

**Attachment Type** - If invoices are to be emailed, the format that the invoice is emailed in, is set in this field. By default *Adobe PDF* is listed but you can change the attachment format by clicking on the *drop-down button* and selecting an alternative format from the list displayed.

**Copies** - This option allows to set the default number of invoices to be printed.

#### Ask for Method on Print:

If this option is un-ticked X, the *Delivery Method* selected above will automatically apply when a sales order is processed.

If this option is ticked, then you will be asked to select whether to 'print only' or email an invoice when a sales order is processed.

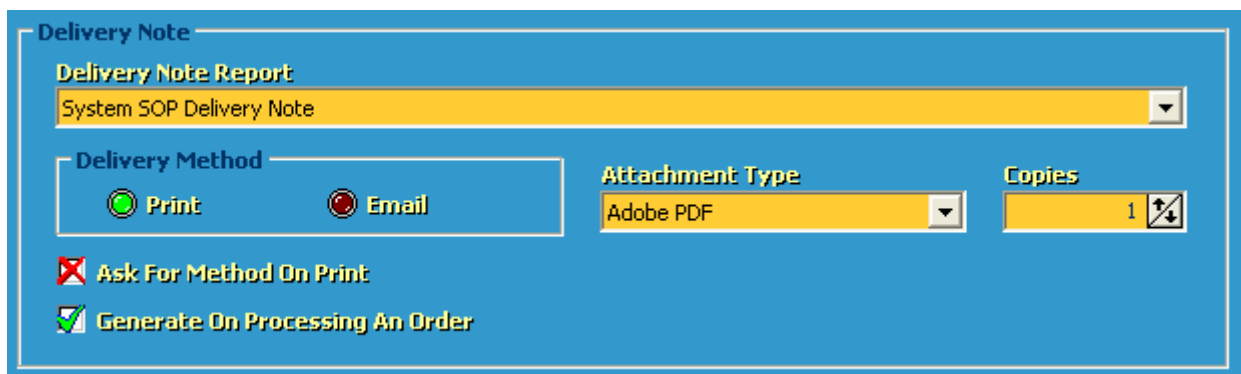
#### Generate On Processing An Order:

If this option is ticked, then invoices are automatically generated when a sales order is processed. If un-ticked X, then no invoice will be printed however, sales recording and stock control will process.

In the MiniPOS® SOP system, invoices can be re-printed on demand, even after a sales order has been processed and original invoices printed. You can do this by choosing the invoice to print on the *Invoices Tab* for a sales order and clicking on the *Print Invoice Button*.

#### Delivery Note Options

Delivery Notes can be printed along with Invoice printing as part of sales order processing. The default Delivery Note report shows all the products being invoiced and despatched but does not show any pricing.



**Delivery Note**

**Delivery Note Report**  
System SOP Delivery Note

**Delivery Method**  
 Print     Email

**Attachment Type**  
Adobe PDF

**Copies**  
1

Ask For Method On Print

Generate On Processing An Order

The configuration settings for Credit Notes is the same as for Invoices described earlier in this guide, please refer to the invoice configuration text substituting the word **Invoice** for **Delivery Note**.

## Quote Options

The MiniPOS® SOP system can be used to produce quotations and either print or email the quote. A quote can be modified and reprinted and processed as a sales order when required.

The configuration settings for Credit Notes is the same as for Invoices described earlier in this guide, please refer to the invoice configuration text substituting the word **Invoice** for **Quote**.

There is no option for *Generate On Processing An Order* as quotes are printed on demand via the *Print Quote Button* at the bottom of the sales order entry screen in MiniPOS® SOP.

## Picking Options

You can print a Picking List as part of your sales order processing routine along with Packing Labels as required. This option enables the order picking to be confirmed before the order is processed to invoicing. Items not picked can be placed on back order for processing at a alter date. If you do not want picking lists and just want to process the order as entered, there is an option to skip the picking list routine.

### Picking List:

Click on the *drop-down button* to display a list of reports and select the Picking List report that you require. *(There are pre-configured SOP System Reports to choose from. Please contact your dealer if you require a specific layout - this maybe chargeable. Only SOP System Reports created under the Local section of the reports designer will display in the above list.)*

### Copies (Picking List):

Enter or adjust the number of copies of Picking List you require to be printed.

**Packing Labels:**

Click on the **drop-down button** to display a list of reports and select the Packing Label report that you require. *(There are pre-configured SOP System Reports to choose from. Please contact your dealer if you require a specific layout - this maybe chargeable. Only SOP System Reports created under the **Local** section of the reports designer will display in the above list.)*

**Copies (Packing Labels):**

Enter or adjust the number of copies of Packing Labels you require to be printed.

**Automatically Pick Whole Order:**

If the **Automatically Pick Whole Order** option is un-ticked X, then you must process sales orders by entering a picked quantity into the **Picked** column of the MiniPOS® SOP entry screen. Once a picked quantity has been entered you can process the sales order and print invoices etc.

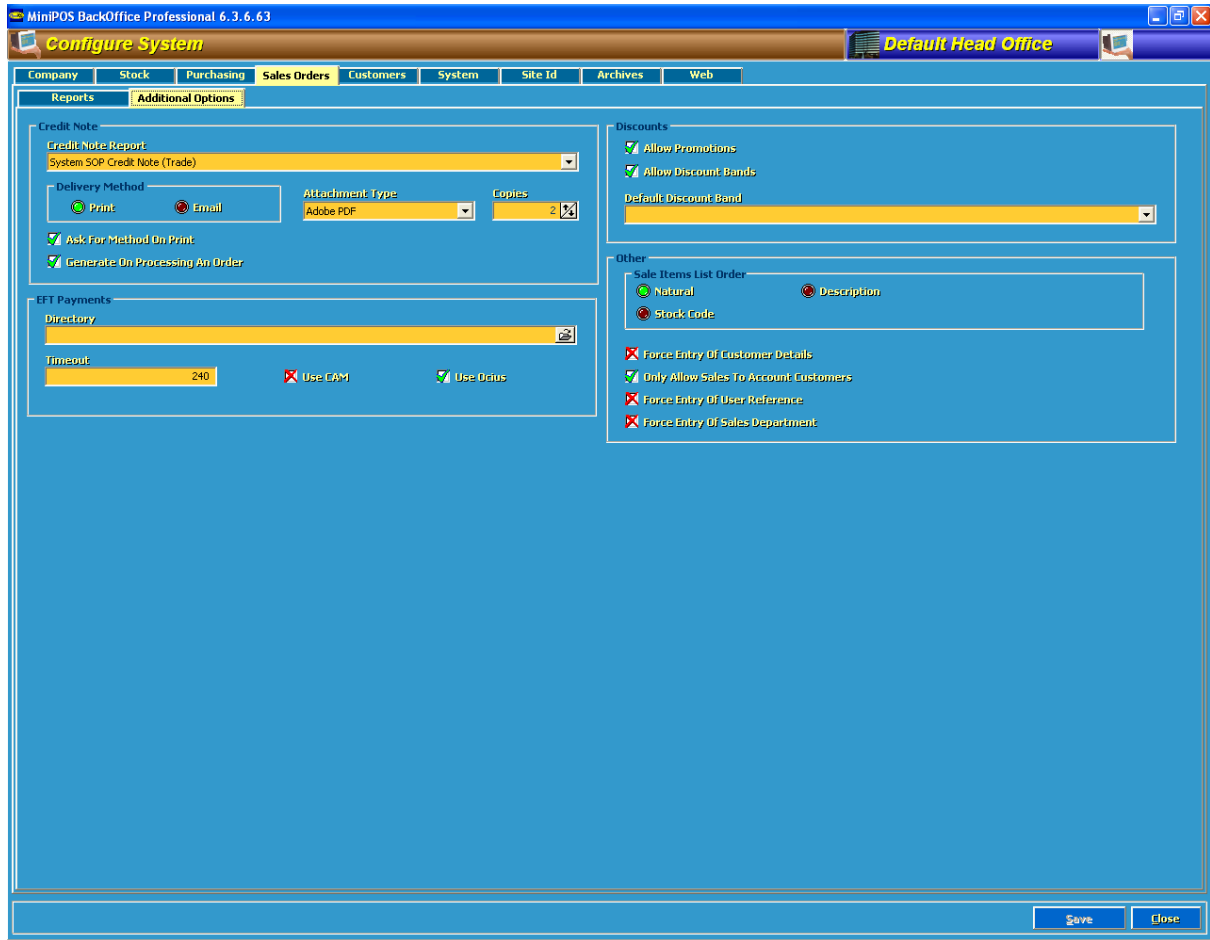
If the **Automatically Pick Whole Order** option is ticked then all sales order quantities entered are automatically entered into the **Picked** column of the MiniPOS® SOP entry screen when the order is processed and invoiced. This option should be set if you do **not** require the picking routine in MiniPOS® SOP processing.

**Allow Back Order:**

You should tick this option if you want to manage back orders for your sale order processing. Any part picked orders that are processed will have the shortfall quantity for each item added to the **On BO** column in the MiniPOS® SOP entry screen. These back orders can be picked and processed at a later date as required or cancelled if necessary.

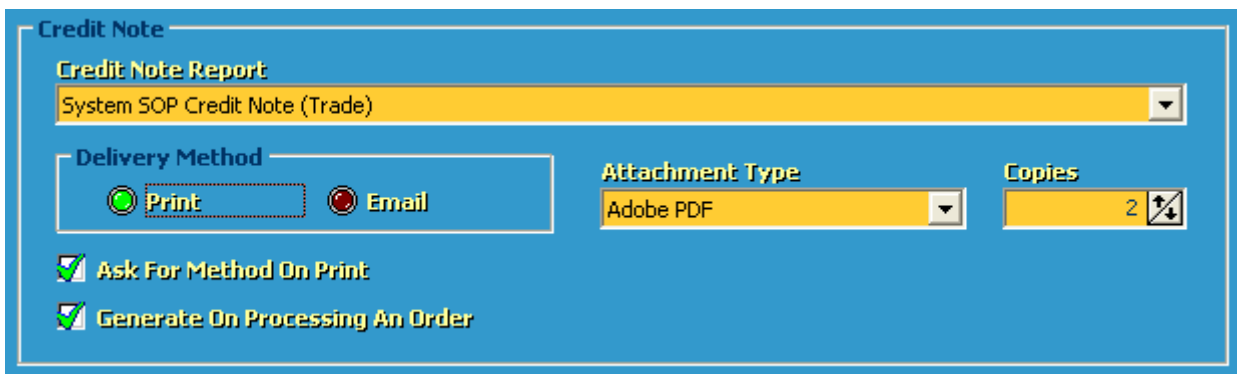
### Additional Options Tab

This is the 2<sup>nd</sup> tab for the MiniPOS® SOP configuration settings and displays the Credit Note Printing options, EFT Payments, Discounts and Other option settings.



### Credit Note Options

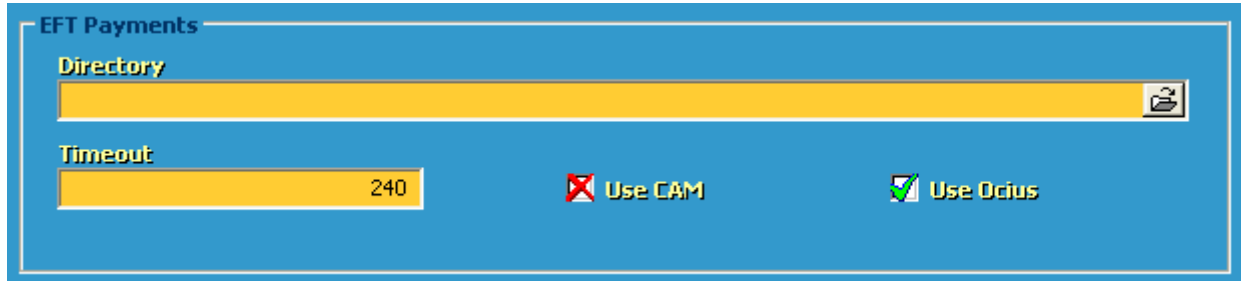
If you wish to print invoices for sales orders processed, you can select the type of invoice printed and when the invoice should be output. You can assign a specific invoice report to customers in the MiniPOS® Customer Database. If a specific invoice report has been assigned to a customer then the SOP default invoice will be ignored. You can prevent invoice printing if for example you operate a **tele-sales** facility where orders are paid for by cash or credit card and no invoice output is required.



The configuration settings for Credit Notes is the same as for Invoices described earlier in this guide, please refer to the invoice configuration text substituting the word **Invoice** for **Credit Note**.

**EFT Payments:**

The MiniPOS® SOP system supports cash payments for sales orders processed in addition to invoicing or credit notes to customers accounts. This is particularly important where the MiniPOS® SOP system is being used as a Tele-Sales facility where pre-payments are required before an order can be processed. Integrated Credit Card payments can be setup using the **EFT Payments** options:



Please consult your dealer for information on integrated Credit Card processing and option settings. *(Requires additional credit card processing software and services.)*

**Discounts:**

MiniPOS® SOP can support Stock Sale Promotions as set up in the MiniPOS® Stock Control Module and Customer Discount Banding as set up in the MiniPOS® Customer Database Module. In addition you can set up a Default Discount Band that will automatically apply discounts or surcharges to all sales orders entered.


**Allow Promotions:**

If this option is ticked then stock sale promotions as defined in the MiniPOS® **Stock / Promotion Manager** will be automatically applied to sales order entry.

**Allow Discount Bands:**

If this option is ticked then customer specific discounts are automatically applied as defined in MiniPOS® **Customers / Discount Bands**.

**Default Discount Band:**

Click on the **Drop-down Button** on right to list all discount bands that have been defined in MiniPOS® **Customers / Discount Bands**.

Select the discount band that you want to automatically apply to sales orders for customers that do not have a specific discount band set up.

*(Uses for this option may be that you want to run a tele-sales facility and apply a discount or surcharge to all orders entered.)*

## Other Options

### Sale Items List Order:

The options here list products in MiniPOS® SOP in a specific order:

**Natural** - Lists products in the order they were entered.

**Description** - Lists products in Description order.

**Stock Code** - Lists products in stock code order.

### Force Entry Of Customer Details:

This option if ticked, forces the selection of a Customer for sales orders. If un-ticked X, customers can still be selected but it is possible to enter sales orders without a customer selected. *(The SOP system can be used to process sales for a remote store or concession that does not have it's own EPoS system. In this case sales information or tag scanning can be implemented for a particular store / branch / concession for stock control and sales reporting. Please refer to the SOP Manual or consult your Dealer for further information.)*

### Only Allow sales To Account Customers:

If this option is ticked then the MiniPOS® SOP system can only process sales orders for customers that have a credit account as defined in **Customers / Customer Details**. If this option is un-ticked X, you will be prevented from processing sales for customers that do not have the **Run Account Flag** set in **Customers / Customer Details**.

*(You should have this option un-ticked if you want to operate a tele-sales facility with pre-payment by cash or credit card for orders in addition to invoiced sales.)*

### Force Entry Of User Reference

With this option ticked, users are forced to enter a **User Reference** for each sales order entered. User references would normally be a purchase order number or name but this a free text field on the Sales Order Entry Screen and the user can enter any appropriate reference.

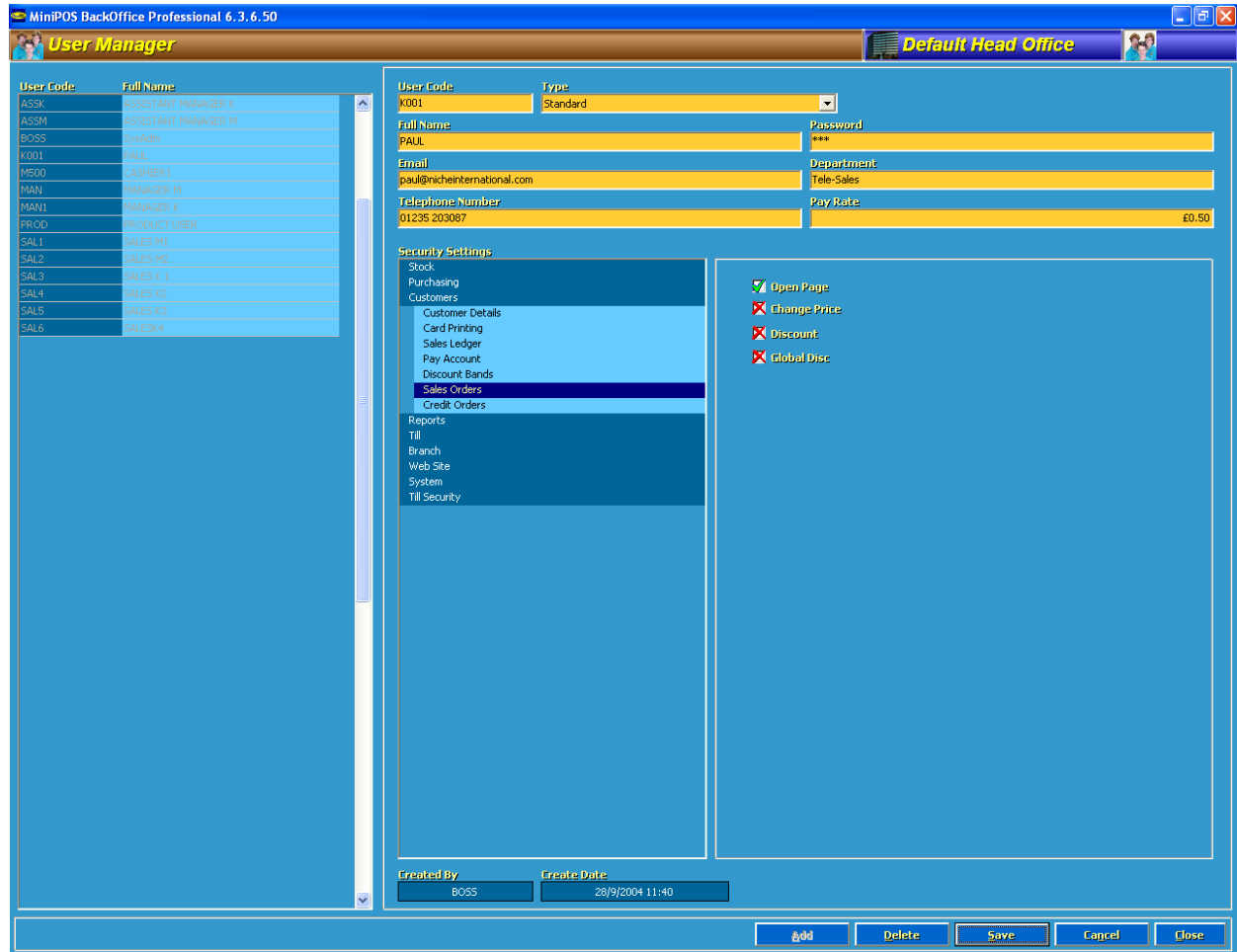
### Force Entry Of Sales Department

This option if ticked will force users to select a **Sales Department** for each sales order entered. Sales Departments are a maintained list of headings that can be used to identify where an order originates, who the sales rep is, what promotion the order is from etc. Forcing this entry on each sales order ensures that all orders have these headings assigned to assist in reporting.

## SOP User Configuration

You can control certain functions that users can access in MiniPOS® SOP. You allow access to Sales Ordering or Credit Orders and allow price changing or discount entry as required.

### Sales Orders Security Settings



Navigate to **System / User Manager** and click on a user name from the list on the left of the screen.

In the **Security Settings** section, click on **Customers** and then click on **Sales Orders**. The Sales Orders Security options will display on the right as shown in the screenshot above.

**Open Page** - This option allows users to access the MiniPOS® Sales Orders system.

**Change Price** - If ticked this option allows users to change product pricing in sales orders.

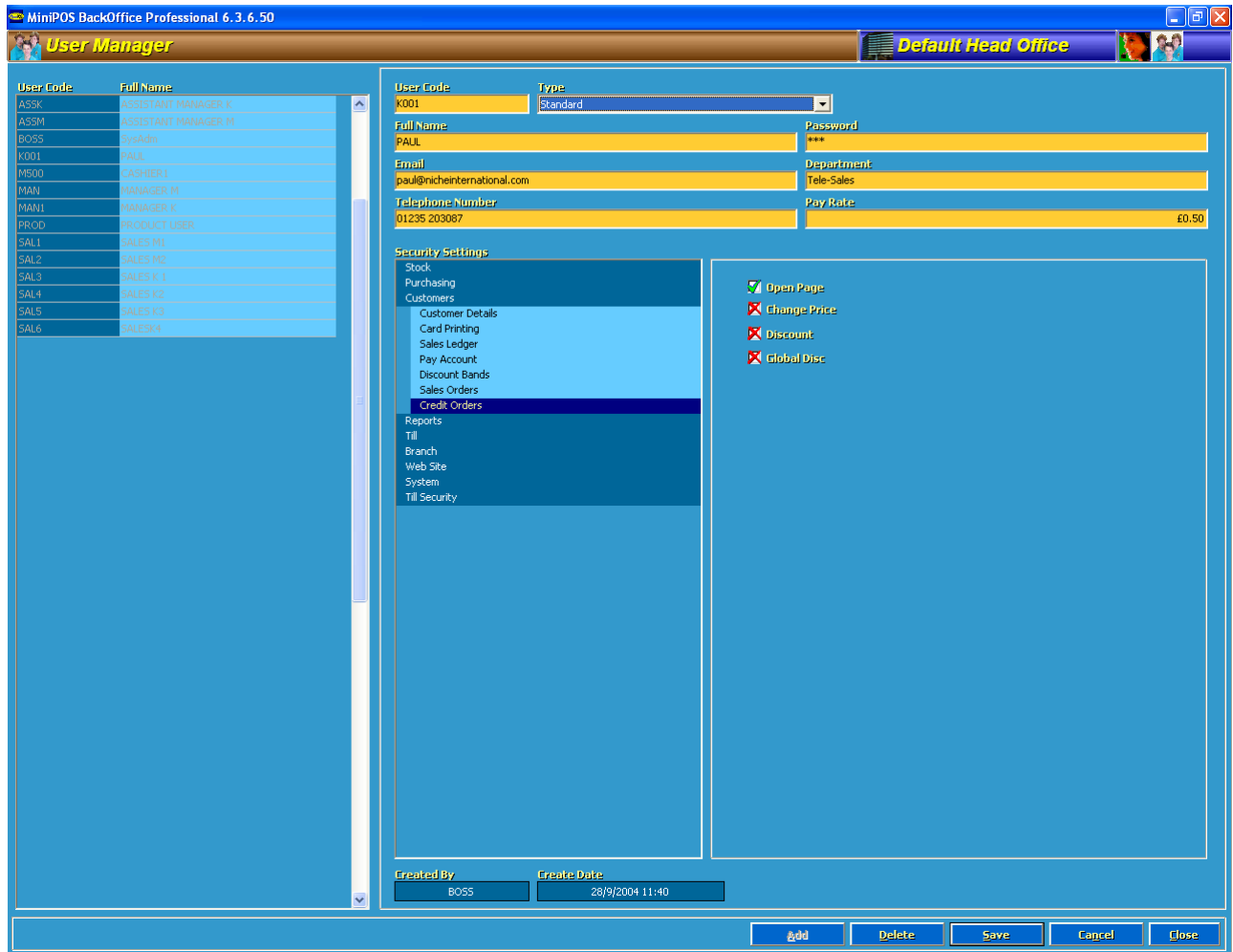
**Discount** - This allows users to enter an item discount for any product entered (line disc).

**Global Discount** - If ticked, users can enter a total discount (Global Discount), which will be applied to the Sales Order Total figure. The Global Discount amount entered will be applied, pro-rata to all the products on the sales order.

*(If the sales order entered is for a VAT Exclusive Customer (trade), the prices shown on-screen will display nett of VAT, any Global Discount entered will be the discount before VAT is calculated. If the order is for a standard retail customer, the prices shown on screen will include any VAT and any Global Discount entered will include VAT.)*

## Credit Orders (Credit Notes) Security Settings

There are separate user security settings for Sales Orders and Credit Orders (Credit Notes) as you may want one or more users processing sales orders only without access to Credit Orders and possibly another user responsible for credit orders.



Navigate to **System / User Manager** and click on a user name from the list on the left of the screen.

In the **Security Settings** section, click on **Customers** and then click on **Credit Orders**. The Credit Orders Security options will display on the right as shown in the screenshot above.

**Open Page** - This option allows users to access the MiniPOS® Credit Orders system.

**Change Price** - If ticked this option allows users to change product pricing in credit orders.

**Discount** - This allows users to enter an item discount for any product entered (line disc).

**Global Discount** - If ticked, users can enter a total discount (Global Discount), which will be applied to the Credit Order Total figure. The Global Discount amount entered will be applied, pro-rata to all the products on the credit order.

*(If the credit order entered is for a VAT Exclusive Customer (trade), the prices shown on-screen will display nett of VAT, any Global Discount entered will be the discount before VAT is calculated. If the credit order is for a standard retail customer, the prices shown on screen will include any VAT and any Global Discount entered will include VAT.)*