



All screenshots in this document are from P-2. The screen below is the 2-tabbed standard input screen. The sales and purchase order screens are very similar to each other.

🛃 Sales Order - SORD104043 (Provisional Do	cument No)	
Order Header Reference Order Items		
Order No Originator SORD104043 SQSDBA	Nett Weight 12.0 Gross Weight 14.0 Dimensions 16 x 14 x 20	
Order Date Customer's Reference 06/Jul/2023	Customer No. Customer Na 01/ROTORK Store Rotork Contr	ame Delivery date
Divisionio [none] partamento Commercially s Exch Rate	BP V Early Payment Discount Due date	Actions on Save Print Mail Create Purch Order
Address	Delivery address Rotork Controls Ltd Brassmill Lane Lower Weston BATH Avon BA1 3JQ	Rotork Controls Ltd Brassmill Lane Lower Weston BATH Avon BA1 3JQ

On the first tab the details of the order header are entered in an intuitive way. Customer or supplier details are retrieved using wildcard searches or dropdowns. The customer or supplier details can be retrieved directly from Dream By Unit 4 or PS Financials by Iris for those users. Alternatively the details can be copied into a separate data table, and then multiple addresses, favourite items, price lists, or comments and references can be linked to the customer or supplier account.

In this example, three of the document reference fields have been configured to hold packing specifications, but these can be configured as dropdown lists, dates or Yes/No choices. These fields can be hidden, disabled, renamed or made mandatory according to system settings.

When this screen is completed, items will be entered (as over) and then return to this screen to authorise, print and save. On saving, the invoice can (if the option is implemented) automatically create purchase orders for the items on sales orders.

There is a range of right-click menus used to set order header options. These can be demonstrated on request.



Order Items are added by selecting them from the tree shown below.

)rder Header Reference	Order Items							
Oltem ID 💿 Item Description								
	n ⊖External ID	Search (Item De	scription) :		Search			
Peppers Cable Glands	Item ID	External ID	Description	Price before Discount. (£)	Price (£)	<u>Q</u> uantity	UoM	Net Valu
Dynamic Items	RCCC		Conference Costs Recharg	2,000.00	2,000.00	1	ea	2,0
Documentation Materials and Swarf Non Stock Items Stock Supplementaries Carriage			Entertaining Expense Reen	300.00	500.00			
	Group Items Ord	lered: 2	Group Tot	al Value:				2,5
	Total Items Ord	lered: 2	Grand Tot	al Value:				2,5

Prices may be set in the database or may need to be entered every order, depending on the set-up.

The item tree is user-configurable	🞐 Item Sear	ch Results (Item like 'ACBLN/M2*')		\times
and a maintenance screen enables	Item Search R	esults		
the items to be reorganised within	ltem Id	Item Description	External Id	
the tree by dragging and dropping	ACBLN/M20	M20 x 1.5mm Pitch Brass Locknut		Cancel
the tree by tragging and tropping	ACBLN/M25	M25 x 1.5mm Pitch Brass Locknut		(C. 11. 1
them.	ACBLN/M25L	M25 x 1.5mm Pitch Brass Locknut 6mm Thick		Help
Items are selected by clicking round the tree or by searching on an item's ID, description or external ID (manufacturer part number). Search results are as shown on the right. Items are added to the order simply				

The bottom of the screen shows the order value as a running total, and the 'Ordered Items' branch at the top just shows the items so far added to the order.

As with the order header there are extensive right-click options.

by entering a quantity.



Orders can be entered using **simple input**, a quick option if staff know the organisation's part numbering.

🖆 Purchase Or	rder - PC	ORD5 (Provi	isional Doci	ument No)						C	
Header Ad	dresses	Comments	Currency	Delivery								
Supplier S/SUDDEN Delivery Date	Order Su Su De	No: PORD upplier Title uddensource Division [n epartment [n	5 Supplier Acc one] one]	ount	Order Date: 06/07 Suppl Annua Annua Authorised	7/2023 ier's Reference al Fee Print on Save	e Discount	(%)				
<u>I</u> tem ID		External ID		Descr	iption	Price before Discount. (£)	Price (£)	<u>Q</u> uantity	UoM	Net Value (£)	VAT (£)	Gross Value (£)
CSW/SUPPORT	Г		Compute	er Support		2,500.0	0 2,500.00	1	Unit	2,500.00	500.00	3,000.00
Total Items	Ordered:	1								2,500.00	500.00	3,000.00
Available items Item Id ASS/COMPU CA CSW/SUPPC Co UGI/HOSTIN W UGI/INSUBA Ins	APITAL: C omputer S 'eb Site H surance F	Item Descri Computer Har upport osting Month Premium	iption dware Ily Charge		Item selection All items Price list items Account items Contract items	Ctrl+1 Ctrl+2 Ctrl+3 Ctrl+4 Ctrl+5	ular Items Item Id		Descrip	tion	[

When using simple input, the header is entered using the tabs across the top of the screen, and a lot of detail can be pre-populated by using either different order templates (which have different 4-letter codes) or by using prototypes, which can have pre-set terms such as transport, Intrastat options, or customers and suppliers, for example.

The items are entered by keying the item IDs (part numbers) in and tabbing from field to	Search Method Group Tree O Item List O Criteria Description O Item ID O	Summary Locations Docum	nents Usage Suppliers	Illustration antity in stock and item	Hide tab headings
field. Users can set up favourites which can be	Supplier Ref C External ID C ACBLN/M16	Item ID:	External I	D:	Item Status:
entered by clicking the list at the bottom left.	ACBLN/M16 M16 x 1.5mm Pitch B	Stock Currently in Stock: On order from Suppliers:	22,347 ea	Prices Purchase Average	0.08 per ea
All orders, when saved, update the required quantities within P-2 which can be seen in the Item Enquiry screen (shown right).		On order from Works: Available Stock: Allocated to Works Orders On order to Customers: Being Transferred Free Stock:	ea = 22,347 ea = 203 ea = 203 ea = 0 ea = 22,144 ea	Alternative Fixed Sales Cost of Sales – Profitability = Retail Price	0.00 per ea 0.110156 per ea -0.110156 per ea 0 per ea
(0					



Orders can be **output** in a number of ways. **P-2** has simple in-built print formats for all generic document types (sales orders, GRNs, and so on). It also has a **user-defined** output function, which is most commonly used to gener-

ate prints in Word, as shown (right). A Word print type can be set as the default for a particular order template.

User defined output can also be used to generate simple HTML orders and electronic orders in an XML format to the BASDA eBIS specification.

P-2 can also output orders in a "P-2 Report" format, which can be read by other users of P-2 or by anyone having the P-2 Report Viewer, a small program which users of P-2 can give to their colleagues, customers or suppliers.

P-2 can output orders in other ways. Suddensource has recently implemented document output in **PDF** format for several users. In summary, P-2 can output in these formats:

- Word
- XML/HTML
- Excel (P-Ex only)
- PDF (P-Ex only)
- Text files (to create EDI files), subject to specification
- QuickBooks IIF format (P-Ex only)

lindley Cetering It Inde FarkStadium Inde Fark DERBY	D with the soft accord	REAM User GI nospono ent association cha promoting intera doin amo s of DEAM corporate a con ware and cost mating a rou aspment reedbads.	roup Incered Mgac Janong P		
DE24 8XL		Order No: Dete:	PL	IRCHASE	ORDER 10802 12/11/2007
		Account No:			S/FRIDEFK
		OurVAT Humi	oen 🛛	Gi	3906 3017 47
		Petren: Deter	2		00N ng +/000
)ur Reference : wease Supply the folio	Autmn 2007 Meeting				
Dur Reference: , wase Supply the folio kern ugx/reggw4185	Autrim 2007 Meeting		QCY 1 JIN'S	Unit: Pritce 382.98	Va Kuc 382.98
Dur Reference: , hease Supply the folio kem UGX/ROGMHIRE UGX/ROGMHIRE	Autom 2007 Meeting volng: Description Meeting Boom Hire Legenss Sur Weeting Boom Hire Legenss Sur	te	Qcy + Unic + Unic	Unit: Price 382.98 51.06	Va Kuc 382.98 51.06
Dur Reference: , hease Supply the folio kern ugx/Rogawilke ugx/Rogawilke ugx/Catering	Automa 2007 Meeting wing : Description Meeting Boom Hire Legends Sa Meeting Boom Hire Hird Box H Cate ing Costs Teal Conferences	πα 1 30 πΔ	Quy 1 Jinto 1 Jinto 1 Sti Jinto	Unit: Price 382.98 51.06 1.66	Varus 382.98 \$1.06 248.94
Dur Reference: , wease Supply the folio kem ugar tagawhite ugar tagawhite ugar care ting ugar care ting ugar care ting	Autom 2007 Meeting wing: Description Meeting Boom Hire Legens: Su Meeting Boom Hire MirC Box (4 Case-Hig Costs: Teal Order Office Case-Hig Costs: Lind Office	ίτφ i λι / έ	Qey - i dinic - i dinic - i S0 dinic - S0 dinic	Unit. Pritce 382.98 51.06 1.66 9.79	Va Ma 342,94 51,06 244,94 449,36
Dur Reference: , wesse Supply the folio исклюдамнике исклюдамнике исклюдения исклюдения исклюдения	Autom 2007 Meeting volng: Description weeting isom the Legends Sur weeting isom the interfection Case ing Cases Teal Conferences Case ing Cases Lind Equipment the Screen Providence in	ηφ j η ης 	257 1 μης 1 μης 150 μης 50 μης 1 μης	Unit: Pritce 382.98 51.06 1.66 9.79 42.55 42.55	Value 342.94 51.06 243.94 439.36 42.55
bur Reference: , wase Supply the folio kem uGX/ROGMHIRE uGX/ROGMHIRE uGX/CAFERING uGX/CAFERING uGX/CQUIP uGX/EQUIP	Automa 2007 Meeting wing: Description Meeting Boom Hire Legens Sui Accella Boom Hire Legens Sui Cate-thg Cates Lind Cate-thg Cates Lind Eautomant Hire Excent Bautomant Hire Excent	100	257 1 1107 1 1107 1 1107 1 107 1 107 1 107 1 107	Unk Price 132.93 51.06 1.66 9.79 42.55 8.51 170.21	Value 342.94 51.06 243.94 449.36 42.55 3.51 17.05
нит Reference: кет исхлеадамие исхлеадамие исхлеадамие исхлеадие исхлеадие исхлеацие исхлеацие исхлеацие исхлеацие тоданствая чало ве	Autom 2007 Meeting wing: Peachaloon Weechalloon fire Legens Sui Weechalloon fire fird Les II Caseing Coss Tail orrestrics Caseing Coss Suind Fourpment fire Lecterin Tourpment fire Lecterin Tourpment fire Lecterin Tourpment fire Lecterin Caseing Coss Suind	ηφ i 3) η κ	26.9 - 1 ปกกั - 1 ปกกั - 1 ปกกั - 1 ปกกั - 1 ปกกั - 1 ปกกั - 1 ปกกั	Unk Price 342.98 51.06 1.66 9.79 42.55 8.51 (70.2)	Value 332.98 51.06 243.94 439.36 42.55 3.51 170.21 £ 1,393.61
Dur Reference: hease Supply the folio ken UDX: KODAHIEF UDX: KODAHIEF UDX: CATERIA UDX: CATERIA UDX: CATERIA UDX: CATERIA UDX: CATERIA UDX: CATERIA UDX: CATERIA UDX: CATERIA UDX: CATERIA DOX: CATERIA CATE	Autom 2007 Meeting wrine: Description #deeding Boom files Legends Sui deeding Boom files Hird Boot Gate-sing Costs Lunch Eautyment Hird Leadem Eautyment Hird Leadem Eautyment Hird Leadem	ίος i 2χθα 	2007 1 ปกก 1 ป	unit: Pritce 182,98 51,06 1,66 9,79 42,55 8,51 170,21	Vanue 1432.48 51.66 244.94 449.36 42.55 8.51 170.22 £ 1,393.61
Aur Reference: heave Supply the folio kem UCXY FOGM-HER UCXY FOGM-HER UCXY FOGM-HER UCXY FOGM-HER UCXY FOGM-HE UCXY FOGM-HE Heave Hoos: Deltiver To:	Automa 2007 Meeting wing : Description Accords Boam file in Legends Su Accords Boam file in C Board Catering Cases Lind 1 Catering Cases Lind 1 Bougment Airs Leasen Bougment Airs Leasen Bougment Airs Projector xer VATI: DREAM User Group		Qev i Unic i Unic S0 Unic i Unic i Unic i Unic i Unic i Unic	Unik Frise 332.93 31.06 1.65 9.79 42.55 3.51 170.21	Va sa 342.44 54.44 449.36 42.55 3.57 170.21 £ 1,393.61
Aur Reference: , wase Supply the folio uax readwhite uax readwhite uax readwhite uax require uax require uax require uax require uax require uax require uax require uax require uax require between To:	Autom 2007 Meeting wing: Peachaloom Hire Legens Su Meechaloom Hire Legens Su Accela Boom Hire Hird Les H Casening Coss Tail of Area Hird Casening Coss Tail of Area Boulgment Hire Leaden Boulgment Hire Leaden Eougnment Hire Proteocor xc VATI: DREAM User Group 1 Ambarrow Cressent SANDUIRST GU47 SUA	Rφ i	Qev/ i Un/t, i Un/t, i S0 Un/t, S0 Un/t, i Un/t, i Un/t, i Un/t,	Unit: Price 382.98 51.06 1.66 9.79 42.55 8.51 170.21	Va n.a 382, 48 51 0 60 248, 94 449 7, 86 42, 75 8, 51 170, 21 £ 1, 393, 61
Aur Reference: , hease Supply the folio kem UGX/RGGMHIRE UGX/CATERING UGX/CATERIN	Automa 2007 Meeting wing: Description Meeting Boam Hife Legens Sui Accords Boam Hife Legens Sui Catering Cases Lind Catering Case	hφ j	Q4// 1 μη/ς 1 μη/ς 1 μη/ς 30 μη/ς 1 μη/ς 1 μη/ς 1 μη/ς	unit, Fritce 382,94 51,06 1,66 9,79 42,55 3,55 170,21	V2888 342,49 244,94 449,36 42,55 8,51 170,22 170,22 € 1,393,61
Dur Reference: ; iwass Supp v the folio kern udx roddwiller udxreddwiller udxred i v udxred i v udxred i v udxred i v udxred i v v Pease Hoce: Delt ver To: whorese by: gree: uppfor Fax Ho:	Autom 2007 Meeting wing:	Rφ i i jη RΔ	Q4/ 1 Unit 1 Unit 1 Unit 30 Unit 1 Unit 1 Unit 1 Unit 1 Unit 1 Unit 1	unk Price 382.98 51.06 1.66 9.79 42.55 8.55 170.21	¥2888 382,93 248,94 449,55 422,55 8,51 170,22 € 1,393,61

For more information about P-2, please download one of our other P-2 brochures:

- Overview
- Stock Control
- Invoicing
- Utilities

SUDDENSOURCE

Suddensource Ltd 1 Ambarrow Crescent SANDHURST

GU47 8JA ☎ 01252 878841 sales@suddensource.com www.suddensource.com