

# P-2 from Suddensource

## Order Processing

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 Document No)

Order Header Reference Order Items

Order No: SORD104043  
Originator: SQSDBA  
Nett Weight: 12.0  
Gross Weight: 14.0  
Dimensions: 16 x 14 x 20

Order Date: 06/Jul/2023  
Customer's Reference: 321/14A  
Customer No.: 01/ROTORK  
Customer Name: Rotork Controls Ltd  
Delivery date:

Division: [none]  
Currency: GBP  
Exch Rate: 1.0000  
Early Payment Discount Due date:  
Authorised:   
Actions on Save: Print  Mail  Create Purch Order

Address: Rotork Controls Ltd, Brassmill Lane, Lower Weston, BATH, Avon, BA1 3JQ  
Delivery address: Rotork Controls Ltd, Brassmill Lane, Lower Weston, BATH, Avon, BA1 3JQ  
Invoice address: 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.

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

Item ID	External ID	Description	Price before Discount (£)	Price (£)	Quantity	UoM	Net Value
RCCC		Conference Costs Rechar	2,000.00	2,000.00	1 ea		2,00
EXPRCE		Entertaining Expense Rech	500.00	500.00	1 ea		50
Group Items Ordered:		2	Group Total Value:				2,50
Total Items Ordered:		2	Grand Total Value:				2,50

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 and a maintenance screen enables the items to be reorganised within the tree by dragging and dropping them.

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 by entering a quantity.

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.

Item Id	Item Description	External Id
ACBLN/M20	M20 x 1.5mm Pitch Brass Locknut	
ACBLN/M25	M25 x 1.5mm Pitch Brass Locknut	
ACBLN/M25LM25	M25 x 1.5mm Pitch Brass Locknut 6mm Thick	

## Order Processing

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

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 field. Users can set up favourites which can be entered by clicking the list at the bottom left.

All orders, when saved, update the required quantities within P-2 which can be seen in the Item Enquiry screen (shown right).

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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 generate 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 Catering Ltd  
Fride Park Stadium  
Fride Park  
DERBY  
DE24 8XL

**DREAM User Group**

An independent association chartered with promoting interaction amongst users of DREAM corporate accounting software and coordinating a group development feedback.



**PURCHASE ORDER**

Order No:	PORD2
Date:	12/11/2007
Account No:	5/FRIDEFK
Our VAT Number:	GB 908 8017 47
Your Ref:	Book ing 47008
Delivery Date:	

**Our Reference:** Autumn 2007 Meeting

Please supply the following:

Item	Description	Qty	Unit Price	Value
WGX/RDGMHIRE	Meeting Room Hire Legends Suite	1	382.98	382.98
WGX/RDGMHIRE	Meeting Room Hire MFC Box 16	1	51.06	51.06
WGX/CATE RING	Catering Costs Teat coffee/ biscuits	150	1.66	248.94
WGX/CATE RING	Catering Costs Lunch	50	9.79	489.36
WGX/EQUIP	Equipment Hire Screen	1	42.55	42.55
WGX/EQUIP	Equipment Hire Lectern	1	8.51	8.51
WGX/EQUIP	Equipment Hire Projector	1	170.21	170.21
<b>Total Order Value (exc. VAT):</b>				<b>£ 1,393.61</b>

Please Note:

Deliver To: DREAM User Group  
1 Ambarrow Crescent  
SANDHURST  
GU47 8JA

Authorised by: \_\_\_\_\_  
 Signed: \_\_\_\_\_  
 Supplier Fax No: 01252 878883

1 Ambarrow Crescent, SANDHURST, GU47 8JA, UK  
 Telephone: 01252 878841      http://www.suddensource.org  
 Facsimile: 01252 878883      email: info@suddensource.org

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

- Overview
- Stock Control
- Invoicing
- Utilities



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