**P-2** includes a wide range of other functions in addition to the Order Processing, Stock Control and Invoicing described in our other brochures.

## Enquiries and Reporting

Users can use the **Document Viewer** to find all documents of a certain type that meet the search criteria entered. The document viewer displays information about addresses, values, term and conditions, as well as a list of the items on the document. A context menu on the document header lets you carry out actions such as checking profitability, authorising unauthorised documents, printing documents, or posting un-posted invoices. A context menu on the item list lets you do things like check stock or do an item enquiry.

**P-2** has three main **Enquiry** screens. The **Item Enquiry** shows a summary of an item's pricing, stock levels, allocations, stock locations, approved suppliers and (if you've entered one) a picture of the item. It also shows a document and stock transaction history. For most users this is probably the most used feature of P-2.

The **Account Enquiry** shows a customer or supplier's account details including aged debt/credit, document history, correspondence diary (as shown), linked items and comments, including data from eight user-configurable reference fields.



The **Stock Enquiry** shows the items and stock levels by main location and sublocation. Context menus take the user to information about the item selected.

The in-built **Reporting** is designed mostly for the everyday user. The on-screen reports are too numerous to list but include stock usage, aged debt, sales and purchase analysis, expected deliveries, planned despatches and item profitability. Other reports focus on individual items, accounts and nominal codes. The reports menu can be fully customised by user group.

## XML Orders/Invoices

P-2 can import accept purchase invoices and sales orders from XML documents. Documents in the standard BASDA V3.0 format should import with little configuration, though custom format XML documents can be imported using P-Ex Automation. P-2 can export purchase orders and sales invoices as XML, to BASDA 3.0 or any other similar standard with very little configuration.

## Bundled Products

Sales Orders can be raised for kitted or bundled items. The part number used on the order, despatch and invoice need not exist as a sales or stock item on the system, but can be an alias for a set of other parts.

P-2 supports normal bills of materials for bundled items, but it also has a very sophisticated system of 'dynamic' kits, where the description, cost and component makeup are determined dynamically using elements of a part number. This is a complex system which was invented so that a client could maintain fewer than 20 bills of materials instead of over 500,000. We would be very happy to explain this to potential clients, and if you need more details, please download our Case Study entitled *Selling Bundled Products*.

## Works Orders

P-2 includes a simple Works Orders function:

- One or more stock items are used up to make a different (finished) stock item
- The stock levels of items made and used are adjusted automatically
- Finished items can have one or more single-level bills of materials (or a temporary BOM can be used)
- The finished item is costed at the cost of all the items used, plus a conversion cost if specified
- Parts to be used are allocated to works orders not yet made, and those to be made are flagged as on order

## Credit Management

The "Dream" version of P-2 features a credit management module. A series of letters can be set up to chase debts which have been outstanding for different lengths of time. You can decide how old a debt has to be for a certain letter to be triggered and which letter is sent to which customers.
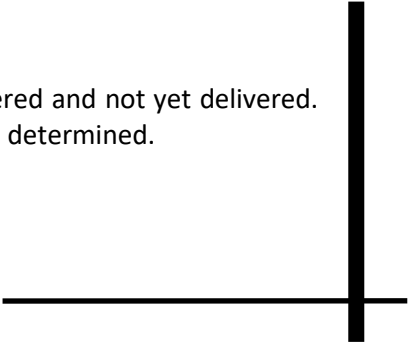
You can also edit the Word master and view previously sent batches of letters using the same system screen (shown).

Credit Management Letter Maintenance

| Code | Description | Location of File |
|---|---|---|
| UK30 | Home sales - standard 35 day letter | W:\DSCM\UK30.doc |
| UK60 | Home sales - standard 65 day letter | W:\DSCM\UK60.doc |
| UKDIST60 | Home sales - distributors 65 day letter | W:\DSCM\UKDIST60.doc |
| UKSPEC60 | Home Sales - contract customers 65 day let | W:\DSCM\UKSPEC60.doc |

## Accruals

P-2 can set up accruals for items delivered but not yet invoiced, or for items ordered and not yet delivered. They show any anomalies on documents, where cost codes may not yet have been determined.

These can be saved and printed, posted to Dream, or just viewed and deleted.

Optional Features

There are some licence modules and several smaller features in P-2 which can be implemented according to your needs:

- There is a **Contracts** feature, where prices are held against items for a particular supplier of customer. See 'Price hierarchy' below for more information.
- **Stock Replenishment** can be set up to re-stock a main location by placing purchase orders on approved suppliers. This uses a minimum stock level and re-order quantity for the location.
- **Account Items** can be used to link a supplier or customer to a particular item. This record can contain multiple prices for date ranges, a supplier-specific part code and description, and a status (e.g. listed, approved).
- Supplier or customer **Price Lists** can be set up. Each list has its own prices for the items on the list. Multiple lists can be used for a given supplier of customer.
- The **Buyer's In-tray** is a tool for managing incomplete purchase requisitions and orders.
- **Timesheets** can be implemented subject to a requirement analysis.
- **Project Accounting** can be implemented subject to a requirement analysis.
- **Sourcing** can be implemented subject to a requirement analysis.
- **Stores Requisitions** can be used to request items from a stores location rather than from a supplier.
- **Matrix Ordering** is a specialised order input screen for entering orders of a product in various prices and sizes. It requires specialist implementation.

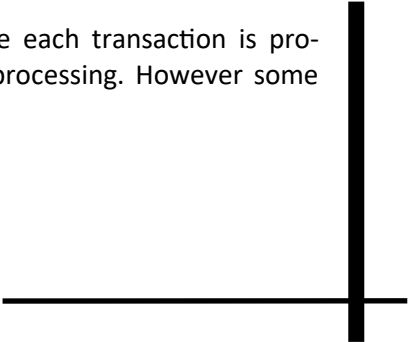Any other requirements will be made available in P-EX, not P-2.

Price hierarchies

P-2 features a price hierarchy, which some users will find helpful. On creating a new order, prices are applied in this sequence:

1. If the item is on a purchase or sales contract, that price is used first
2. Otherwise, if the item is linked to the chosen supplier or customer, the price from the link is used next
3. Otherwise, if the item is on a price list which is linked to the supplier or customer's account, this is used next
4. Otherwise, if the item is on a price list which is linked to the document template being used, this is used next
5. Failing all that, the item master (purchase or sale) price is used.

Timesaving Features

Generally P-2 follows the unitary ledger and document-based principles, where each transaction is processed, referenced and then filed away. As standard there is not much batch processing. However some tasks can be left to be carried out later in batches:

- Posting invoices to Dream or PS Financials
- Printing multiple orders or invoices
- Maintaining items in the same item group
- Stocktake import using text files which you can prepare in Excel

## System Administration

A full maintenance menu is available where the System Administrator can set up the program's infrastructure. This consists of:

- An **Admin** menu where security is set for each user group; system settings are controlled; user groups are linked to customers, suppliers or item groups; the system licence is maintained, and the records of employees are maintained;
- A **General** menu where the following are maintained: customers and suppliers; users' rights to reports; credit management; addresses; Intrastat settings; print types; stock locations and VAT. Additionally a 'codes' menu allows the administrator to set up all the user-defined lists used in the program, including amongst others: departments & divisions, units of measure, trading & transport terms.
- An **Items** menu where items are maintained, along with their groups, their sequencing within groups, specifications, bills of materials and associations with buyers.
- A **Documents** menu where document Templates and Prototypes are maintained.
- A **Prices** menu where price lists, average prices and cost of sales are maintained.

The **Database Manager** program allows administrators to create new databases and run upgrade scripts provided by the Suddensource support team when a new version is implemented.

## Programmer's choice

The original authors of P-2 put a few things in 'because they could' to help you out:

- A daily tip (you can configure your own tips for your own users)
- The ability to run Dream from the menu with your own credentials
- The ability to add commands to launch other programs

## Finally

P-2 is the basis of a good investment for the future. The newer programs in the family will continue to be developed to be independent of your Windows version, whilst P-2 works on all Windows versions up to Windows 11.

The P-2 database schema will remain at the heart of this and other systems into the future.

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

- Overview
- Order Processing
- Stock Control
- Invoicing

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