

Sales Order Prefs

Last Modified on 01/03/2024 10:24 am CST

These settings on the *Sales Order Prefs* tab at *Planning / Setup / Location Preferences* control the preferences for Sales Orders for the selected Location.

Blending/Planning Preferences For Location '00MAIN' SSI Farm Services - IL

Blend Setup | Print Prefs | Miscellaneous | **Sales Order Prefs** | GHS SDS Template | Custom App Sheet

Default Offer Expires Date
Number of Day(s) (0 = Today) Exclude Weekends
 Lock Offer Expires Date
 Require Offer Expires Date
 Disallow Approval of an Expired Sales Order
 Disallow Edit of an Approved Sales Order
 Disallow Edit of Declined Sales Order
 Disallow Edit of an Offered Sales Order except to set Status to Approved or Declined
 Disallow Save of Sales Orders with Products from different Locations
 Disallow Save of Sales Order Exceeding Allocation Amount
 Disallow Delete of Sales Order in Mobile Sales
 Disallow Save of Sales Order with a negative Quantity
 Allow users to create DT from Sales Order in Agvance Sales app

Print Location Heading
 Center Location Heading
 Print Zero Quantity Line Items
 Print Department ID
 Print Unit Price
 Print Product ID
 Print List Prices
 Print Net Pricing Summary
 Print Sales Order Contract

Purchase Terms Message

Document Counters: 00MAIN

Save Cancel

- **Default Offer Expires Date** – Selecting this option sets the expiration date automatically when entering Sales Orders.
 - **Number of Days** – Enter the number of days for the default expiration date.
 - **Exclude Weekends** – Marking this option skips weekends when calculating the *Offer Expires* date.
 - **Lock Offer Expires Date** – With this option unchecked, the *Expiration Date* may be edited on the Sales Order. Selecting this option locks the *Expiration Date* so it is not available to be edited.
- **Require Offer Expires Date** – This option verifies that an *Offer Expires Date* is entered on the Sales Order.
- **Disallow Approval of an Expired Sales Order** – When selected, expired Sales Orders may only have the *Status* changed to *Declined*.
- **Disallow Edit of an Approved Sales Order** – With this option selected, the only change allowed to an *Approved* Sales Order is changing the status to *Declined*.
- **Disallow Edit of Declined Sales Order** – Once a Sales Order is marked as *Declined*, with this option selected, edits to that Sales Order are not allowed.
- **Disallow Edit of an Offered Sales Order except to set Status to Approved or Declined** – This preference,

when marked, restricts editing Sales Orders except changing the *Status* to *Approved* or *Declined*.

- **Disallow Save of Sales Orders with Products from Different Locations** – Selecting this option verifies the Products on the Sales Order are from one Location. If multiple Locations' Products have been selected, saving the Sales Order is not allowed.
- **Disallow Save of Sales Order Exceeding Allocation Amount** – This option, when enabled, checks the Sales Allocation amounts to confirm the Sales Order does not exceed the Sales Allocation amounts.
- **Disallow Delete of Sales Order in Mobile Sales** – With this option selected, Sales Orders are not allowed to be deleted in the Mobile Sales module.
- **Disallow Save of Sales Order with a negative Quantity** – Marking this option does not allow negative quantities to be entered for Products on Sales Orders.
- **Allow users to create DT from Sales Order in Agvance Sales app** – With this option selected, Delivery Tickets can be created from Sales Orders in the Agvance Sales app.
- **Print Location Heading** – This prints the Location information on the heading of the Sales Order document.
- **Print Zero Quantity Line Items** – When this option is selected, line items on the Sales Order with a zero quantity are included on the printed document.
- **Print Unit Price** – When this option is selected, the Unit \$ is included for each Product line item on the printed document.
- **Print List Prices** – When this option is selected, the List Price for each Product line item is included on the printed document.
- **Print Sales Order Contract** – When this option is selected, the *Sales Order Contract Verbiage* will be printed on a separate sheet with the Sales Order.
- **Center Location Heading** – When this option is selected, the Location information is centered on the heading of the printed document.
- **Print Department ID** – When this option is selected, the Department ID for each Product line item is included on the printed document.
- **Print Product ID** – When this option is selected, the Product ID for each Product line item is included on the printed document.
- **Print Net Pricing Summary** – When this option is selected, the Net Pricing Summary will be printed on the Sales Order document.
- **Purchase Terms Message** – A *Purchase Terms Message* can be manually input and printed on the Sales Order document.
- **Document Counters** – Selecting this opens the *Setup Document Counters* window, where Blend Ticket and Sales Order numbers can be determined. Each can be set to *Use Global Number* or *Auto-number Document*. Additionally, the *Last Document Number* can be manually overwritten. Selecting **Set Location Counter** allows for counters to be set individually for each Location.

Note: If setting Location Counters, it is important to set wide enough ranges to avoid overlapping transaction

numbers. Caution should be taken when updating document counters. To ensure transactions are not being made when the Document Counters are being updated, make sure all users are signed out of Agvance. Contact SSI support for help with this process.