



DS0546

Track and Display Incoterms on SOP Documents



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Problem Definition

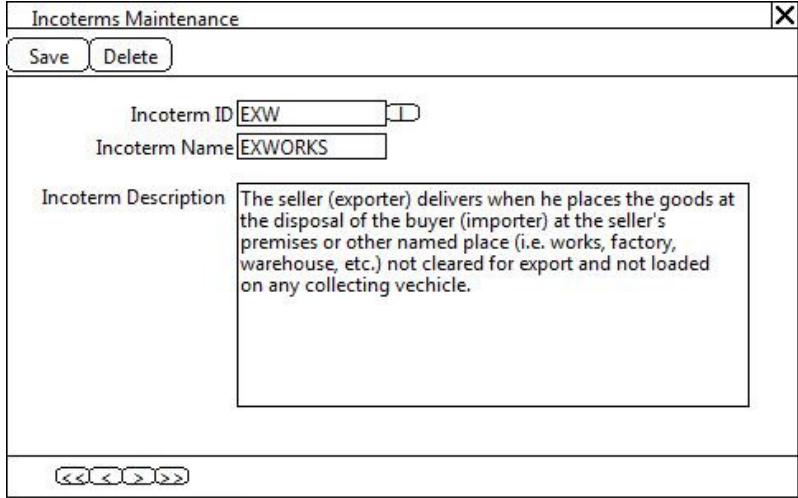

<i>Problem Definition</i>	CCDA
<p>ACME Co. has the need to display Incoterms on all invoices created in GP. This includes the 3 digit Incoterm acronym, Incoterm Name and the Detailed Description. A sample of the fields and data required are as follows:</p> <p>Incoterm: <u>EXW</u> Incoterm Name: <u>Ex Works</u></p> <p>Detailed Description: <i>The seller (exporter) delivers when he places the goods at the disposal of the buyer (importer) at the seller's premises or other named place (i.e. works, factory, warehouse, etc.) not cleared for export and not loaded on any collecting vehicle. This term thus represents the minimum obligation by the seller (exporter), and the buyer (importer) has to bear all costs and risks involved in taking the goods from the seller's premises. However, if the parties wish the seller (exporter to be responsible for the loading of the goods on departure and to bear the risks and all costs of such loading, this should be made clear by adding explicit wording to this effect in the contract.</i></p>	

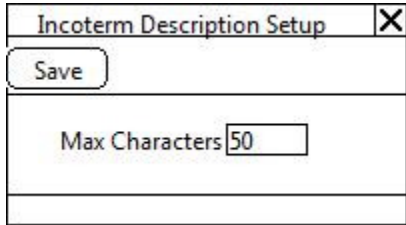


Solution Overview

<i>Solution Overview</i>	CCDA
Please see Design Features below.	

Design Features

<i>Incoterms Maintenance</i>	CCDA								
<p>Navigation: Tools >> Setup >> Sales >> Incoterms Maintenance</p> <p>This window is used to maintain the list of Incoterms which can be utilized on Sales Documents.</p>  <p> = Lookup Button</p> <table border="1" data-bbox="191 1174 1270 1304"> <thead> <tr> <th>Field</th> <th>Function</th> </tr> </thead> <tbody> <tr> <td>Incoterm ID</td> <td>User enter an Incoterm ID, or selects one from the Lookup</td> </tr> <tr> <td>Incoterm Name</td> <td>User enters or updates an Incoterm name</td> </tr> <tr> <td>Incoterm Description</td> <td>User enters or updates an Incoterm description</td> </tr> </tbody> </table>	Field	Function	Incoterm ID	User enter an Incoterm ID, or selects one from the Lookup	Incoterm Name	User enters or updates an Incoterm name	Incoterm Description	User enters or updates an Incoterm description	
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<i>Incoterm Description Setup</i>	CCDA				
<p>Navigation: Tools >> Setup >> Sales >> Incoterms Description Setup</p> <p>This window is used to maintain the maximum number of Incoterms Description characters per line that will print on the Sales document.</p> <div data-bbox="527 542 930 764" data-label="Form">  </div> <p>The MAX CHARACTERS field will be limited to 80 characters due to Report Writer restrictions.</p> <table border="1" data-bbox="191 889 1272 954"> <thead> <tr> <th>Field</th> <th>Function</th> </tr> </thead> <tbody> <tr> <td>Max Characters</td> <td>User enters the maximum characters</td> </tr> </tbody> </table>	Field	Function	Max Characters	User enters the maximum characters	
Field	Function				
Max Characters	User enters the maximum characters				

Sales Transaction Entry	CCDA								
<p>Navigation: Transactions >> Sales >> Sales Transaction Entry >> Additional >> Sales Document Incoterm</p> <p>This window is used to select the appropriate Incoterm for the Sales document.</p> <div data-bbox="268 509 1188 1049" style="border: 1px solid black; padding: 5px;"> <p>Sales Document Incoterm X</p> <p>Save Delete</p> <p>Incoterm ID <input type="text" value="EXW"/> <input type="button" value="Lookup"/></p> <p>Incoterm Name <input type="text" value="EXWORKS"/></p> <p>Incoterm Description <div style="border: 1px solid black; padding: 5px; width: fit-content;"> The seller (exporter) delivers when he places the goods at the disposal of the buyer (importer) at the seller's premises or other named place (i.e. works, factory, warehouse, etc.) not cleared for export and not loaded on any collecting vehicle. </div></p> </div> <p><input type="button" value="Lookup"/> = Lookup Button</p> <table border="1" data-bbox="191 1136 1270 1263"> <thead> <tr> <th>Field</th> <th>Function</th> </tr> </thead> <tbody> <tr> <td>Incoterm ID</td> <td>User enters and Incoterm, or selects one from the Lookup</td> </tr> <tr> <td>Incoterm Name</td> <td>The Incoterm name defaults</td> </tr> <tr> <td>Incoterm Description</td> <td>The Incoterm description defaults</td> </tr> </tbody> </table> <p>The user is only allowed to select an existing Incoterm ID from this window. The user is NOT allowed to update the Incoterm Name or Incoterm Description from this window or</p>	Field	Function	Incoterm ID	User enters and Incoterm, or selects one from the Lookup	Incoterm Name	The Incoterm name defaults	Incoterm Description	The Incoterm description defaults	
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Incoterm ID	User enters and Incoterm, or selects one from the Lookup								
Incoterm Name	The Incoterm name defaults								
Incoterm Description	The Incoterm description defaults								

create a new Incoterm ID. All new Incoterm ID's or any updates to Incoterm Names and Descriptions must be completed from the Incoterm Maintenance window.

Only ONE Incoterm can be selected per Sales Document.

The Incoterm Description will print in the Item Description field of the Sales Document beneath the last entered Sales Line Item. The text will be parsed so that it fits in the Item Description field and will be wrapped to the next line. The MAX CHARACTERS set in the Item Description Setup window will determine the length per line to print.

When a Sales Document is transferred (Sales Quote → Sales Order → Sales Invoice) the Incoterm ID assigned to the Sales Document will transfer as well.

Report Integration

To support printing the Incoterm ID and Incoterm Name on GP Sales reports, an integration will be provided for a report writer function called `RW_GetTableLineString()`. The documentation provided with the customization will provide step-by-step instructions on how to add a calculated field to an existing GP report which will display the fields.