Account Backorder

Summary:

The purpose of this tool is to provide a weekly update on backordered orders/items for a specific client.

1. What is it you want to know exactly?
    a. What orders/items are currently backordered with ETA split by two categories
        i. Client systems
        ii. Networking
2. What is your hypothesis on this?
    a. Automating this process will dramatically improve time spent preparing the report.
3. What is a realistic outcome for you?
    a. A process that has historically taken 4.5 – 5 hours to complete can be done in 30 minutes or less.
4. What will you do with the outcome?
    a. Share with team & client contacts
5. Do we have the right data in place?
    a. Yes

Data Sources:

- Order Inquiry
- BMG – report provided weekly

Notes:

The reports will run based on client bill-to account numbers

- The "Reports" section of the Dashboard with identify the report names
    - Any applicable account number should be identified in the appropriate report name column
- The "Email to" section of the Dashboard will identify the individuals who should receive the completed reports
- The "On Hand" section of the Dashboard will track custom Sku stock quantities – manually updated
- "Overdue ETA" worksheet will be used for ongoing management of ETAs for overdue Skus.
- Data fields required:
    - Inquiry
        - Sold To
        - Sold to Name
        - Order Number
        - 2nd Item Number
        - Description
        - Customer PO
        - Secondary PO 1
        - Promised Delivery Date
        - Quantity Backordered
        - Ext. Backordered
    - BMG
        - Bill To AB
        - Bill to Customer
        - Order No.
        - PCC Sku
        - Product Description
        - Manufacturer
        - Customer PO
        - Secondary Cust PO
        - Ordered By
        - Order Date

- ETA
- Qty. Shippable
- Ext. Shippable
- Qty. on BO
- Ext. Backorder
- Comments

Processing – Run:

- Capture reports list
- Validate reports list
- Clear old data
- Add new backorder items
- Update ETAs
- Clear old data from Overdue ETA list
- Provide tally of new items added to each report

Processing – Save:

- Capture reports list
- Validate reports list
- The file path will match that of the Account Backlog workbook
- The file name will be "[Client Name] [Group] Backorders " with the current date appended
- Save each report to a separate workbook

Processing – Send:

- Capture reports list
- Validate reports list
- The file path will match that of the Account Backlog workbook
- The file name will be "[Client Name] [Group] Backorders " with the current date appended
- Verify file exists
    - Create email subject line & body
    - Build list of email addresses provided in the "Send To" section of the "Control Panel" worksheet
    - Attach the pdf doc
    - Open prepared email for sending

Version History:

- **Version 1.0 – 3/15/2021**
- **Version 1.1 – 3/25/2021**
    - Dashboard update
        - Added indicator for which report an email address should be applied to
        - Implemented headers to the separate sections of the Dashboard for easy identification
            - “Send to:”
            - “On Hand Items:”
            - “Reports:”
    - Email address validation check
        - Leveraging code from "Microsoft Excel 2019 VBA and Macros" by Bill Jelen & Tracy Syrstad
- **Version 1.2 – 3/31/2021**
    - Check for existing file before saving results & prompt user to overwrite existing file.
    - Capture the “on hand items” to automatically include in body of client report
- **Version 1.5 – 5/10/2021**
    - Realignment of the Dashboard
        - Control buttons moved to the far left side
        - “Reports:”, “Send to:” then followed by “On Hand Items:”
- **Version 2.1 – 10/18/2021**
    - Implementation of SumIf() function to capture count of backordered quantities for “On Hand Items:” list.
    - Addition of PO Quantity to “On Hand Items:” list to ensure POs are being created for Skus as they are ordered.
    - Leverage code by Ron de Bruin 28-Oct-2006 to range capture “On Hand Items:” for inclusion in email notifications for client reporting.
    - Implementation of Pivot Tables to summarize per Sku the following for client systems data:
        - Sum of Quantity on Backorder
        - Total Backorder $ Amount
        - Max ETA Days, Weeks, Months