

Justin Pope

From: Ben Erickson
Sent: Wednesday, December 21, 2022 11:33 AM
To: Justin Pope
Subject: RE: SCT/PO Automation for Retail Initial Discussion

- Only applies to 3## branches
- Need to create a new custom form field for the SpecialOrder (ticket #)
- Need to determine when an order is OK to do this (Shawn Feely) Credit terms, order status, etc.
 - At a minimum has to be SorMaster.OrderStatus IN 1, 2, 3 AND SorDetail.MBackOrderQty > 0 And New SpecialOrder custom form field flag = Y
- Quantity to be used on the SCT/PO would be the MBackOrderQty value
- Kit Parents are excluded (those are identified by SorDetail.MBomFlag = P)
- To determine if SCT or PO to be created, look at InvWarehouse record for that StockCode/Warehouse combination and if TrfSuppliedItem = Y then it would be an SCT otherwise it would be a PO to the default supplier (InvMaster.Supplier)
- If SCT then the Source Warehouse is the InvWarehouse.DefaultSourceWh and the Target Warehouse is the SorDetail.MWarehouse If they are the same, then do nothing. Note you could have multiple SCT's due to have multiple DefaultSourceWh values for the sales order
- If PO, then the Warehouse is the SorDetail.MWarehouse Note you could have multiple PO's based off the Supplier being different for different items.
- SORTTR for creating the SCTs
- After creating, on the Sales Order side Field to update on SorDetail is MReviewFlag – set to P if a purchase order was created and set to S if a Supply Chain Transfer was created.
- On the SCT side, SorDetail.MCreditOrderNo would equal the linked sales order number on the 300 side and SorDetail.MCreditOrderLine would equal the linked sales order line number
- On the PO Side, It's PorMasterDetail.MSalesOrder and MSalesOrderLine
- If there are comments linked to the Sales Order line, then we would want to include those in the PO or SCT
 - Line Type 6 is a comment. NCommentFromLin would match the stocked item that the comment is related to. NComment is the value of the Comment Line
 - When creating the SCT, link the comment to the stocked item using <AttachedLineNumber>

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From: Ben Erickson
Sent: Wednesday, December 21, 2022 10:45 AM
To: Justin Pope <JustinP@summerclassics.com>
Subject: FW: SCT/PO Automation for Retail Initial Discussion

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From: Ben Erickson

Sent: Thursday, September 15, 2022 4:13 PM

To: Nicholas Vasquez <NicholasV@summerclassics.com>

Cc: Richard Bentley <RichardB@summerclassics.com>

Subject: RE: SCT/PO Automation for Retail Initial Discussion

Field to update on SorDetail is MReviewFlag – set to P if a purchase order was created and set to S if a Supply Chain Transfer was created.

We would want a new Syspro custom form field created which would live in the CusSorDetailMerch+ table (Richard would create this field). Options would be “Stock” and “Special Order” Only special order lines for sales orders in status 1 where MQtyOnBackOrder is >0 and MReviewFlag is blank would be considered for a PO/SCT. We would also only be doing this for specific warehouses, so we probably need to create a flag in InvWhControl or have a table that defines which warehouses to consider.

SCJ is the automated WIP Jobbing service that creates jobs – some similar functionality you could possibly copy. PCF is the program for creating purchase orders for just in time materials – this would have some logic for using the PORTOI object and possibly how to select the contract price for the PO.

To determine if it needs a PO or an SCT would be based off the InvWarehouse TrfSuppliedItem flag (link on stock code and warehouse to SorDetail). If it's a Y then we need an SCT, if it's not a Y (could be N or blank) then it needs a PO. If it's an SCT, then the InvWarehouse.DefaultSourceWh would indicate which warehouse to use as the source warehouse on the SCT. The Target Warehouse and PO warehouse would be the warehouse on the sales order line.

On the SCT side, SorDetail.MCreditOrderNo would equal the linked sales order number and SorDetail.MCreditOrderLine would equal the linked sales order line number

On the PO Side, It's PorMasterDetail.MSalesOrder and MSalesOrderLine

San Antonio Store manager – Jason Matej – Backorder Review process

On the sales order header side to know it's an SCT – InterWhSale = Y and fields SourceWarehouse and TargetWarehouse would be populated.

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-----Original Appointment-----

From: Nicholas Vasquez <NicholasV@summerclassics.com>

Sent: Thursday, September 15, 2022 8:46 AM

To: Nicholas Vasquez; Ben Erickson

Cc: Richard Bentley

Subject: SCT/PO Automation for Retail Initial Discussion

When: Thursday, September 15, 2022 3:30 PM-4:30 PM (UTC-06:00) Central Time (US & Canada).

Where: Microsoft Teams Meeting

All,

Just wanted to have a meeting to go over what this Rock is intending to accomplish. I'd like to talk about the area it deals with, what is the goal for this quarter, and what is the goal after that.

This may not take an hour, just wanted to set that in case.

Thanks,
Nicholas Vasquez

Microsoft Teams meeting

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