

Justin Pope

From: Ben Erickson
Sent: Thursday, May 5, 2022 1:58 PM
To: Justin Pope
Cc: Cather Cheese; Maureen Minard
Subject: RE: Testing Freight process

FYI for everyone, Justin and I met today and went through 20+ test orders with a wide variety of order scenarios. All worked flawlessly! The only issue we ran into was a SQL permissions issue. Basically the Syspro users need permissions to the new staging table which is in a different database. Not a heavy lift there, Justin will work with David to update the new user setup process and modify permissions for all the existing users to have access to that one new table.

Justin is now tidying things up and setting this up as a service. I think the only other piece is to review with accounting and get clarify on the change required for the custom calculated field in Syspro that shows them the open reserve value.
R

Ben Erickson Vice President of Information Technology

ben@summerclassics.com
[3140 Pelham Parkway, Pelham, AL 35124](#)
[Telephone: 205-358-9295](tel:205-358-9295)

Visit Gabriella White's Brands:

- [Summer Classics®](#)
- [Gabby®](#)

From: Justin Pope <JustinP@summerclassics.com>
Sent: Wednesday, May 4, 2022 11:02 AM
To: Ben Erickson <ben@summerclassics.com>
Cc: Cather Cheese <CatherC@summerclassics.com>; Maureen Minard <MaureenM@summerclassics.com>
Subject: RE: Testing Freight process

Ben,

Correct me if I am wrong, the request to modify the reserve value is going into the process to add charges to the dispatch and appropriately backorder the remaining. We don't want to modify the Reserve Quantity on the SorDetail record?

I'm attaching the main function to process charges onto this email for you to look at. I have updated the procedure to match the calculations that you provided me. Let me know if you would be interested in meeting and going through the code.

As for the scripts attached:

SalesOrderProcessCharges_Get: Processes the order and dispatch and returns actions to do in the application.
The svfs: helps set up the SORTOIDOC.xml

Also, just touching base on Dispatching orders on DEV, let me know if you can get to it. My process can run when the

Dispatch process hits the [trg_AdmSignatureLog_625100_AfterUpdate] trigger. Attached update trigger for your viewing pleasure. That is when the Order and Dispatch will be staged to be processed.

If there is any way for you to show me to dispatch an order or we can try and get Michael or somebody else to do it in the office that would be great.

Justin Pope Software Developer

JustinP@summerclassics.com
[3140 Pelham Parkway, Pelham, AL 35214](#)

Visit Gabriella White's Brands:

- [Summer Classics®](#)
- [Gabby®](#)

From: Ben Erickson <ben@summerclassics.com>
Sent: Tuesday, May 3, 2022 9:33 PM
To: Justin Pope <JustinP@summerclassics.com>
Cc: Cather Cheese <CatherC@summerclassics.com>
Subject: RE: Testing Freight process

Close. Some adjustments below. Regarding the Waybill, I just mean that when I dispatch it, that will affect all orders on the waybill.

In hindsight, you really don't need the original order value, we just need the value dispatched plus the remaining open value as we're just comparing the freight and surcharge on the order to that amount. Also note it's NMscChargeValue not Qty. So you would end up with 3 scenarios. 1) There's no open freight or surcharge on the order, so don't need to do anything. 2) There's freight and/or a surcharge on the order but no open stocked lines, so just need to take the open freight and/or surcharges and add them to the Dispatch Note. And 3) there's freight and/or a surcharge on the order AND open stocked lines. In that case we would take the Freight value divided by the sum of the open value and dispatched value to get freight percent (and similar logic for surcharge). Then make your adjustments to the line items and add the applicable line to the dispatch.

Open stocked line value:

```
select
    sum(CASE SD.[MDiscValFlag]
WHEN 'U' THEN ROUND((SD.MShipQty+SD.MBackOrderQty+SD.QtyReserved)*(SD.[MPrice] - SD.[MDiscValue]),2)
WHEN 'V' THEN ROUND((SD.MShipQty+SD.MBackOrderQty+SD.QtyReserved)*(((SD.[MOrderQty] * SD.[MPrice]) - SD.[MDiscValue])/SD.MOrderQty),2)
ELSE ROUND((SD.MShipQty+SD.MBackOrderQty+SD.QtyReserved)*(SD.[MPrice] * (1 - SD.[MDiscPct1] / 100) * (1 - SD.[MDiscPct2] / 100) * (1 - SD.[MDiscPct3] / 100)),2)
    END) as Product_Value
from [SysproCompany100].[dbo].[SorDetail] as SD
where LineType = 1
```

Open Freight

```
select
    sum(SD.NMscChargeValue) as Freight_Value
from [SysproCompany100].[dbo].[SorDetail] as SD
left join [SysproCompany100].[dbo].[MdnDetail] as MD on MD.SalesOrder = SD.SalesOrder
and MD.SalesOrderLine = SD.SalesOrderLine
where LineType = 4 and NMscInvCharge <> 'I' and MD.SalesOrderLine is null
```

Open Surcharge

```
Select
```

```

sum(SD.NMscChargeValue) as Charge_Value
from [SysproCompany100].[dbo].[SorDetail] as SD
left join [SysproCompany100].[dbo].[MdnDetail] as MD on MD.SalesOrder = SD.SalesOrder
                                                    and MD.SalesOrderLine = SD.SalesOrderLine
where LineType = 5 and NMscInvCharge <> 'I' and MD.SalesOrderLine is null

```

Dispatched value (filtering on dispatch note being reviewed)

```

Select SUM(MdnDetail.TotalValue) AS DispatchedValue FROM SysproCompany100.dbo.MdnDetail where LineType
= 1 AND DispatchNote = @DispatchNote

```

Ben Erickson

Vice President of Information Technology

ben@summerclassics.com
 3140 Pelham Parkway, Pelham, AL 35124
 Telephone: 205-358-9295

Visit Gabriella White's Brands:

- [Summer Classics®](#)
- [Gabby®](#)

From: Justin Pope <JustinP@summerclassics.com>
Sent: Tuesday, May 3, 2022 4:54 PM
To: Ben Erickson <ben@summerclassics.com>
Cc: Cather Cheese <CatherC@summerclassics.com>; Maureen Minard <MaureenM@summerclassics.com>
Subject: RE: Testing Freight process

Ben,

I apologize for not knowing how to phrase the question, I know that it was requested that modifications need to be made to calculate amount in the reserve value.

To do the following that you requested:

- 1) the original order value of the product vs freight vs surcharge

This would be the sum of the Order lines on the order:

```

select
sum(SD.MOrderQty * SD.MPrice) as Product_Value
from [SysproCompany100].[dbo].[SorDetail] as SD
where LineType = 1

```

```

select
sum(SD.NMscChargeQty) as Freight_Value
from [SysproCompany100].[dbo].[SorDetail] as SD
where LineType = 4

```

```

Select
sum(SD.NMscChargeQty) as Charge_Value
from [SysproCompany100].[dbo].[SorDetail] as SD
where LineType = 5

```

2) the open freight and open surcharge not linked to existing dispatches

This would be something like the following:

```
select
    sum(SD.NMscChargeQty) as Open_Freight_Value
from [SysproCompany100].[dbo].[SorDetail] as SD
    left join [SysproCompany100].[dbo].[MdnDetail] as MD on MD.SalesOrder = SD.SalesOrder
                                                and MD.SalesOrderLine = SD.SalesOrderLine
where SD.LineType = 4
    and MD.SalesOrderLine is null
```

```
Select
    sum(SD.NMscChargeQty) as Open_Charge_Value
from [SysproCompany100].[dbo].[SorDetail] as SD
    left join [SysproCompany100].[dbo].[MdnDetail] as MD on MD.SalesOrder = SD.SalesOrder
                                                and MD.SalesOrderLine = SD.SalesOrderLine
where SD.LineType = 5
    and MD.SalesOrderLine is null
```

3) the newly dispatched value of the product

This would be something like the following:

```
select
    MM.DispatchNote,
    sum(StockItems.ExtPrice + Charges.ExtPrice) as Dispatched_Value
from [SysproCompany100].[dbo].[MdnMaster] as MM
    left join (
        select
            MD.DispatchNote,
            sum(MD.MQtyDispatched * MD.MPrice) as ExtPrice
        from [SysproCompany100].[dbo].[MdnDetail] as MD
        where MD.LineType = 1
        group by MD.DispatchNote) as StockItems on MM.DispatchNote =
StockItems.DispatchNote
    left join (
        select
            MD.DispatchNote,
            sum(MD.NMscChargeValue) as ExtPrice
        from [SysproCompany100].[dbo].[MdnDetail] as MD
        where MD.LineType in (4,5)
        group by MD.DispatchNote ) as Charges on MM.DispatchNote =
Charges.DispatchNote
group by MM.DispatchNote
```

Once we have these values, what tables do we need to update?

As for Waybill, how do I access Waybill? As far as the sales orders that I gave you, these should be the corresponding waybill:

Waybill	Sales Order
31309	100-1045135
31361	100-1044762
31361	200-1083342
31361	200-1085740
31361	200-1087528
31367	220-1129185
31367	220-1132559

31371	200-1090734
31371	200-1090777
31372	200-1082230

Justin Pope Software Developer

JustinP@summerclassics.com
3140 Pelham Parkway, Pelham, AL 35214

Visit Gabriella White's Brands:

- [Summer Classics®](#)
- [Gabby®](#)

From: Ben Erickson <ben@summerclassics.com>
Sent: Tuesday, May 3, 2022 4:09 PM
To: Justin Pope <JustinP@summerclassics.com>
Cc: Cather Cheese <CatherC@summerclassics.com>; Maureen Minard <MaureenM@summerclassics.com>
Subject: RE: Testing Freight process

Note for dispatching, it's by Waybill, So might want to change more on the individual waybills.

For reserve value, not sure what you mean by mark it? I don't think reserve value plays into the calculations. We would need to know the original order value of the product vs freight vs surcharge. The open order value after the dispatch, the open freight and open surcharge not linked to existing dispatches, and the newly dispatched value of the product.

Ben Erickson Vice President of Information Technology

ben@summerclassics.com
3140 Pelham Parkway, Pelham, AL 35124
Telephone: 205-358-9295

Visit Gabriella White's Brands:

- [Summer Classics®](#)
- [Gabby®](#)

From: Justin Pope <JustinP@summerclassics.com>
Sent: Tuesday, May 3, 2022 3:31 PM
To: Ben Erickson <ben@summerclassics.com>
Cc: Cather Cheese <CatherC@summerclassics.com>; Maureen Minard <MaureenM@summerclassics.com>
Subject: RE: Testing Freight process

Ben,

I'm adding Maureen on to this email to let her know where I am at with testing.

Maureen – Currently I'm trying to organize orders on the dev system to be dispatched so I can validate the functionality of the service is working.

Ben – To respond to your message from yesterday, I have sent an issue ticket to Geoff's team to get DataScope access. I'm still waiting on getting access.

As of the orders to dispatch can you dispatch the following:

100-1044762
100-1045135
200-1082230
200-1090734
200-1090777
200-1083342
200-1085740
200-1087528
220-1129185
220-1132559

Also, there is an open question that I have not been able to ask:

For accounting purposes, we need to be able to mark the reserve value for the charges on the order. How do you want this to happen? In my research of the SORTIO business object, I did not see that the Freight and Miscellaneous lines had tags to populate to change Reserve fields.

Justin Pope **Software Developer**

JustinP@summerclassics.com
[3140 Pelham Parkway, Pelham, AL 35214](#)

Visit Gabriella White's Brands:

- [Summer Classics®](#)
- [Gabby®](#)

From: Ben Erickson <ben@summerclassics.com>
Sent: Monday, May 2, 2022 5:07 PM
To: Justin Pope <JustinP@summerclassics.com>
Cc: Cather Cheese <CatherC@summerclassics.com>
Subject: RE: Testing Freight process

They're dispatched from Datascope. Do you have a Datascope login? If so, we can touch base in the morning and walk through how to dispatch. If not, we'll need Geoff's team to get you setup first. In the interim, I can dispatch any of those waybills as needed.

Ben Erickson **Vice President of Information Technology**

ben@summerclassics.com
[3140 Pelham Parkway, Pelham, AL 35124](#)
[Telephone: 205-358-9295](#)

Visit Gabriella White's Brands:

- Summer Classics®
- Gabby®

From: Justin Pope <JustinP@summerclassics.com>
Sent: Monday, May 2, 2022 4:33 PM
To: Ben Erickson <ben@summerclassics.com>
Cc: Cather Cheese <CatherC@summerclassics.com>
Subject: RE: Testing Freight process

Ben,

I have attached a Test plan I have that I am working on.

As far as what I am understanding right now, what dispatches them? I understand Datascope loads them on the truck. Also, my process starts the same place as the old process did. I added to the trg_AdmSignatureLog_625100_AfterUpdate, I have it attached. What needs to happen for the AdmSignatureLog trigger?

Justin Pope **Software Developer**

JustinP@summerclassics.com
[3140 Pelham Parkway, Pelham, AL 35214](#)

Visit Gabriella White's Brands:

- Summer Classics®
- Gabby®

From: Ben Erickson <ben@summerclassics.com>
Sent: Monday, May 2, 2022 3:35 PM
To: Justin Pope <JustinP@summerclassics.com>
Cc: Cather Cheese <CatherC@summerclassics.com>
Subject: Testing Freight process

Attached is a list of orders that are ready to be dispatched in the test environment. Dispatching occurs by Waybill, so we can do those in batches to test a few and adjust and move forward. These are the scenarios I could think of to test:

1. Has open freight line and open surcharge
2. Has open freight line and no surcharge
3. Has open surcharge and no open freight line
4. Has no open surcharge or freight line
5. Has open freight line linked to open dispatch and open freight line not linked to dispatch
6. Has open surcharge linked to open dispatch and open surcharge not linked to dispatch
7. Has open freight line and open surcharge both linked to open dispatch and has open freight line and open surcharge not linked to open dispatch.

This query gives a list of pick slips that are in shipping status. Shipping status means the items have been picked, it just haven't been loaded/dispatched yet. So the next step is to "load" the items on the scanner in Datascope. And then they can be dispatched. I'm going to go ahead and load everything so then they're just ready for dispatching. To do that, you have to have a scan gun, which you don't have. But basically on the scanner, go to the shipping menu, and select truck loading, Input the vehicle, Waybill, and then scan each package.

```
SELECT WBO.Waybill, WBM.Vehicle, PS.PickingSlipNumber, PSS.SourceNumber AS [SalesOrder]

FROM [WarehouseCompany100].[dbo].[tblPickingSlip] PS
INNER JOIN [WarehouseCompany100].[dbo].[tblPickingSlipSource] PSS
ON PS.PickingSlipNumber = PSS.PickingSlipNumber
INNER JOIN [WarehouseCompany100].dbo.tblWaybillOrder WBO
ON WBO.PickingSlipNumber = PS.PickingSlipNumber AND WBO.Selected = 1
INNER JOIN [WarehouseCompany100].dbo.tblWaybillMaster WBM
ON WBM.Waybill = WBO.Waybill
where PS.[Status] = 'SHIPPING'
```

Ben Erickson
Vice President of Information Technology

ben@summerclassics.com
3140 Pelham Parkway, Pelham, AL 35124
Telephone: 205-358-9295

Visit Gabriella White's Brands:

- [Summer Classics®](#)
- [Gabby®](#)