Freight Rate Dashboard 6479

United Tool and Mold Inc

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Use Case:

United Tool's dashboard displays all delivery freight rates for customers from customer master, as well as any customers that have additional ship-to addresses. Cells freight rate value are calculated depending on the one way miles and additional flat charge following formula:

((2 * Miles) * Rate) + Add Flat Charge)

Cells can be set to be "static", and are marked as yellow. This means that the user will be able to manually set the value, and is not affected by the calculation.

Features:

Dashboard with Edit

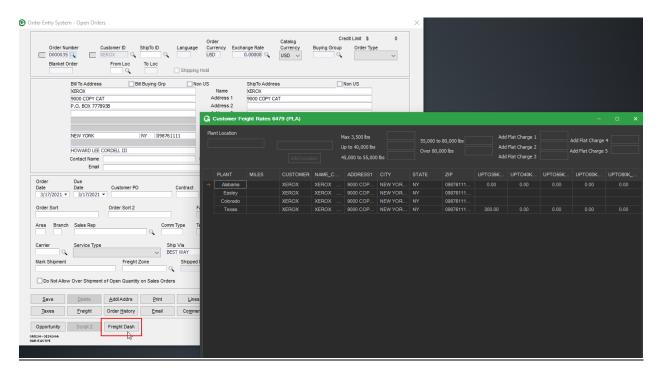
- This version of the dashboard allows user to add new locations, set freight rates, set up miles for customers, and set rates for weight categories to static.
- Launched from Shipping & Receiving>View>Custom Freight Rates Dashboard (6479)

Dashboard No Edit

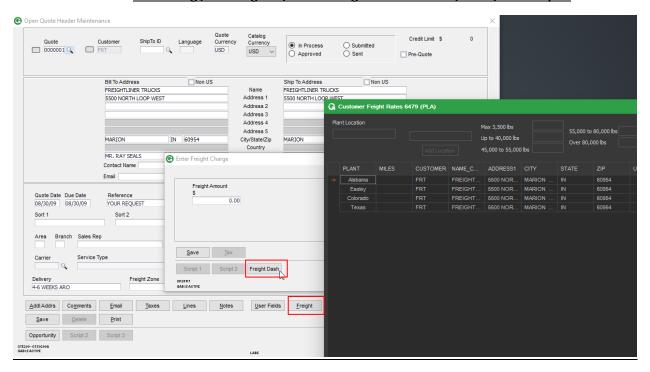
- This version only shows the grid set up from the above menu item for the customer on either the quote or order entry header.
- Orde<u>r Entry Header</u>
 - Order Entry > File > Sales Orders > Open

***Note: Customer has since requested text panel at the top be changed to the following

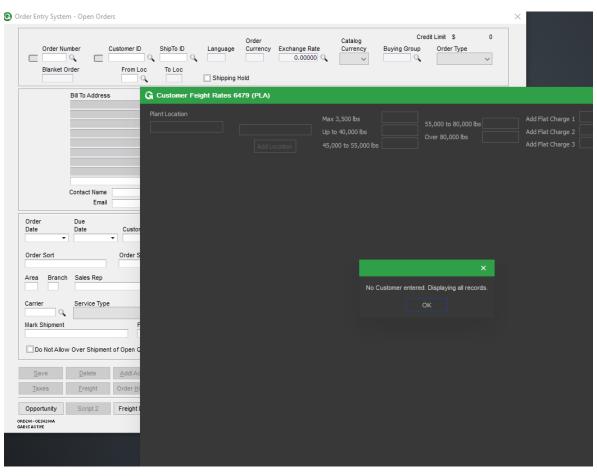


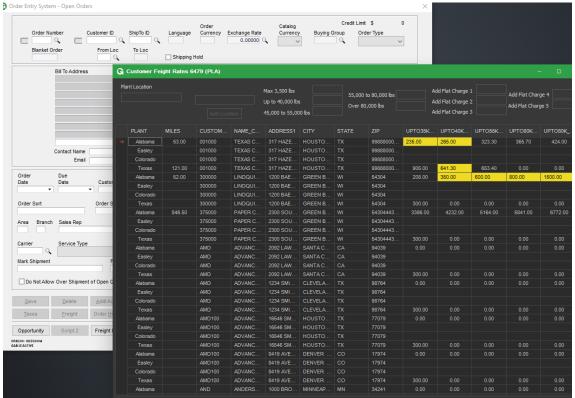


- Launched by Script 3 button
- Quote Header
 - Estimating / Routing & Quote Management > File > Quick Quote > Open



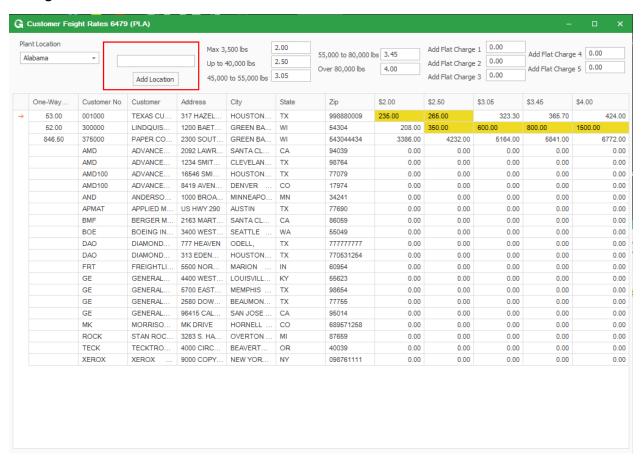
 Launched from core freight button > clicking on Script 3 button, labeled as "Freight Dash"





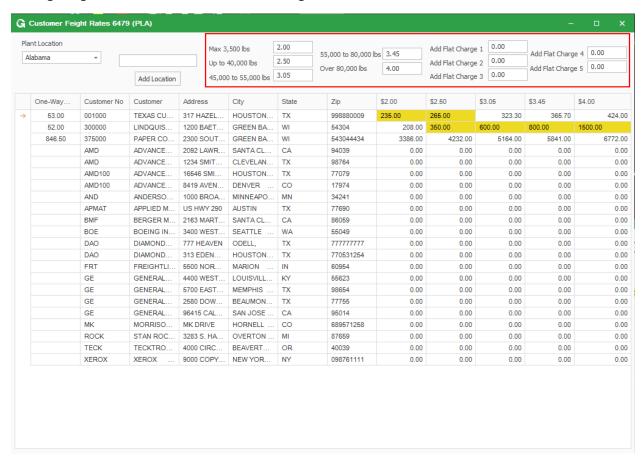
***For both screen locations, if no customer is entered on the header screens, all customer records and all location records will be displayed

Adding Plant Locations



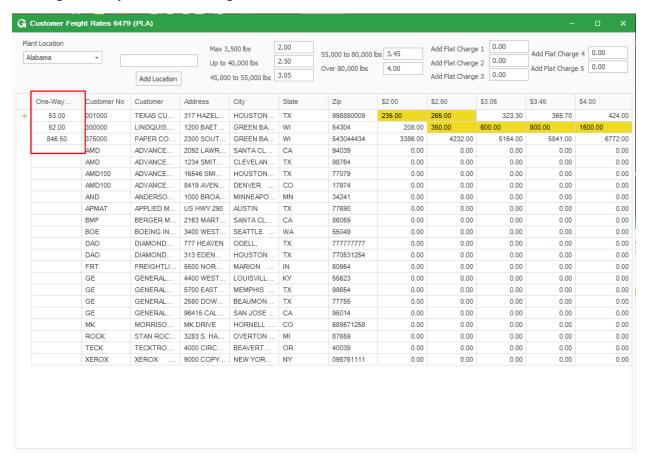
- Upon initial open, need to enter plant locations by entering in location name in the highlighted box, and clicking "add location".
- Location will then be available to select in the Plant location drop down list
 - *If a location needs to deleted, please contact Global Shop Solutions, as the entry will need to be deleted from GCG_6479_PANEL_VALUES as well as all entries w that plant name in GCG_6479_FREIGHT_RATES

Setting Freight Miles Rates and Additional Charges



- Panel values need to be set next. Each box has the weight category range.
 - Numbers should be in format X.XX. T
 - his is the dollar rate value for each mile for the grid below. Upon setting the value, the corresponding column caption will change to match what was entered in the box, and the calculation will be done to the entire column and written back to the custom database table.
 - *Depending on the number of records in CUSTOMER_MASTER and OE_MULTI_SHIP, after setting the value and tabbing out, writing back to the custom Database table can take up to 15 seconds each. This will only need to be done once, as these values should not really be changed once set for the plant location.

Entering One-Way Miles & Resulting Calculations



- Enter in the one way miles from the entered plant location to the customer's address
 - o Calculation will be done and written/updated in the db custom table.
 - Enter miles value with up to 2 decimal places.
 - *When dashboard opens, trailing 0s will be added to make this true. So for example, if user enters 52 as the miles, upon opening the dashboard again, the value will be 52.00.
 - Calculation is: ((2 * Miles) * Rate) + Add Flat Charge)
- When the row's miles are set, script checks that the resulting calculated cost is more than the
 preset minimum dollar amount for each weight category. Currently United Tool has those set
 according to the table below:

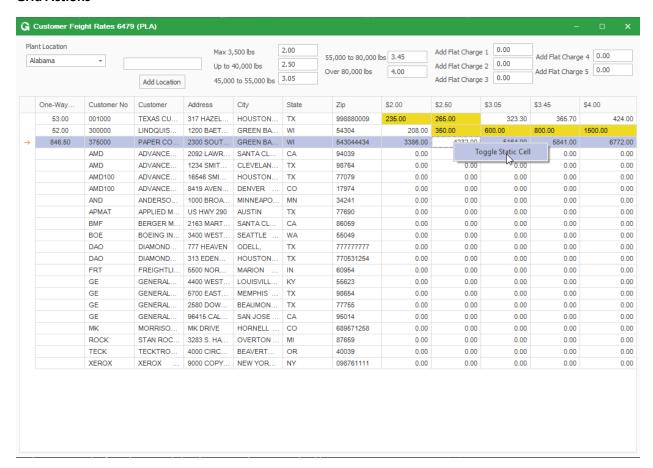
	Dollar Minimum
Max 3,500 lbs	100
Up to 40,000 lbs	350
45,000 to 55,000	600
55,000 to 80,000	800
Over 80,000 lbs	1500

^{***}Note: Updated table below to reflect changes in the panel

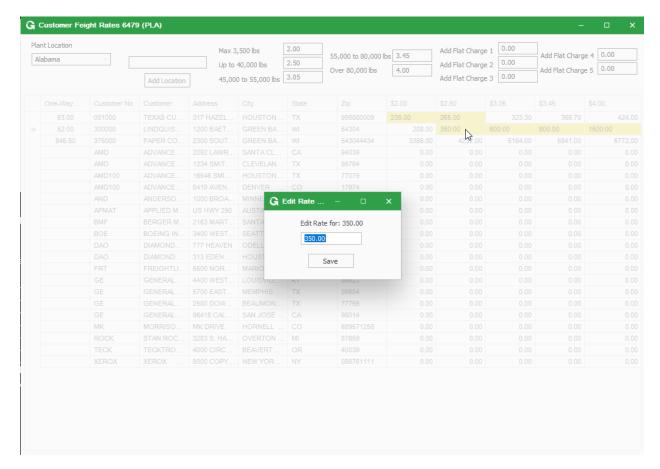
	Dollar Minimum
Up to 3,500 lbs	100
3,501-40,000 lbs	350
40,001-73,000 lbs	600

• If resulting product is not over the dollar minimum, the script will automatically set the cell to be static and mark it as such with the color yellow.

Grid Actions



• If user wants to set a cell's value to be static, right click and toggle. Cell will no longer be affected by changes to its miles or the miles freight rate in the panel in the top right corner.



• To change the value, left click and an additional pop up will come up where user can enter the flat dollar value. This writes that back to the grid when save button is clicked.

Notes for Programmers

- Entire customer data set is stored in GCG_6479_FREIGHT_RATES custom db table. Key value is PLANT, CUSTOMER, ADDRESS1. The rest of the information is filled via dictionaries every time the dashboard is opened to reflect any changes in information from CUSTOMER_MASTER or OE_MULTI_SHIP.
 - ***With ADDRESS1 being a key column, in order to change an address for the customer, the previous record with the old address will need to be removed for all locations from GCG 6479 FREIGHT RATES via SQL
- Grid is formatted via the formatBulk subroutine
 - This is done once when the user selects their first location in the edit version, and once as well for the view only version.
- Grid control's grid view has a dataview of the overall datatable (dtFreightRates) that is filtered using
 the selected plant location's name. This filter is changed and reapplied whenever the user changes
 locations.
- Writing records to db tables
 - o One way miles changed
 - Underlying dataview row changed and this is written via SavetoDB
 - o Panel Value changed
 - Underlying dataview column changed and is written via SavetoDB
 - Only the changed column is written, but performance is still slow (~15 seconds) depending on the number of customer records
 - Panel values also saved to GCG_6479_PANEL_VALUES via SavetoDB
 - Static cell toggle
 - Underlying datatable is changed, and only the row is written via SavetoDB