

6573: Modifications to Sales Order Approval Workflow

Safety Technology international Inc

Overview of changes:

- Addition of “On Hold” checkbox for sales orders, both at header and line level
 - Set to view only on line level, changed if user is in SOAPP security group at the header level.
- When Sales order is marked as on hold, find all associated work orders & sequences that correspond to all lines and mark them on hold as well.
- Add user field 1 from order header, on hold, and approved columns to core Open sales order review dashboard.

Assumptions:

- All Sales orders at time of creation must be marked as approved or on hold prior to saving.
 - To ensure this, script will not allow you to save from sales order header screen until you mark it as on hold or approved. Checking one unchecks the other, and vice versa. For example, if an order is marked as approved, and the user unchecks the approved checkbox, it will automatically check the “on hold” checkbox.

Description:

- New table “GCG_6573_SO_LINE_APP” is used to save every sale order line that has been saved since this project has been installed. Script reads this to set the checkbox states of the approved and on hold check boxes on the order header, order lines, and custom dashboard. Also records the date the sales order was first approved.

Order Entry System - Open Orders

☒ Approved ☐ On Hold

Order Number: 0000204 Customer ID: BMM ShipTo ID: Language: Order Currency: USD Exchange Rate: 0.00000 Catalog Currency: USD Buying Group: Order Type: Credit Limit: \$ 0

Blanket Order: From Loc: To Loc: Shipping Hold: ☐

Bill To Address: ☐ Bill Buying Grp: ☐ Non US: ☐

BERGER METAL FABRICATION
2163 MARTIN AVE.
SANTA CLARA CA 86059
MR. JIM HURLEY
Contact Name: Contact Phone: Ext: Email:

ShipTo Address: ☐ Non US: ☐

BERGER METAL FABRICATION
2163 MARTIN AVE.
SANTA CLARA CA 12345678
MR. JIM HURLEY
Contact Name: Contact Phone: Ext: Email:

Order Date: 2/17/2005 Due Date: 10/22/2005 Customer PO: 006834928 Contract: Price Class Discount: 0.0000 Order Discount: 0.0000 Price Catg: ☐ Discount All Items: ☐ Insurance: ☐ Margin: -291.4285 Project: ☐

GS Quote #: Quote Log #: Facility Code: Last Item No: 006 No Back Orders: ☐ Process Group: ☐

Area: Branch: Sales Rep: Comm Type: Terms: NET30 Waybill Number: 3rd Party Freight: ☐ IncoTerms: OUR DOCK ☐

Carrier: Service Type: Ship Via: BEST WAY Carrier Account: Primary Group: Secondary Group:

Mark Shipment: MR. JIM HURLEY Freight Terms: Shipped Date: 10/12/2021

☐ Do Not Allow Over Shipment of Open Quantity on Sales Orders

Save Delete Addl Addr Print Lines User Fields
Taxes Freight Order History Email Comments Payment Drop POs

Order Entry System - Lines

Order: 204 Line: 001 ShipTo ID: Line Type: Standard ☒ Approved ☐ On Hold ☐ Billing Price and Mat Item ☐ Open Qty: ☐ Insert At Line: ☐

☐ Part: 0050-16083 Rev: Loc: To Loc: Description: GAS LINE Customer Part: ☐ Do Not Print

Qty On Hand: 10 Orig Qty: 25 UM: EA ☐ Inactive Part: Order Qty: 25 Ship Qty: 3 BO Qty: 22 Staged Qty:

Price: USD 5.3900 Discount Price: USD 5.3900 Price Desc: Quoted Price ☐ Include Freight in Price

Prom Date: 10/14/2009 Margin: -291.4285 Cost: 74.998000

Apply Discount: ☐ Yes ☐ No ☒ Use Default Disc Amt: USD 0.00

Order: Price Class: Prod Line:


Prod Line: FG Bin: GL Acct: 400 Part Price Code: Weight: Sort: Comm Type: Price per Pound: USD Taxable: ☐ Allocated Part: ☐ Apply Material Surcharge: No Delivery Before: Must Deliver By: User 1 Defined: User 2 Defined: Group ID: field 1 test: USER FIELD 2: field 3 test: USER FIELD 4: USER FIELD 5:

☐ Do Not Allow Over Shipment of Open Quantity on Sales Orders

Currency	Extended Price	Gross Order Total	Taxes	Freight	Discount	Net Order Total
Order USD	134.75	808.50	.00	.00	.00	808.50

Save Delete Clear Copy Line Ship Sched Status Taxes Text Exit
History COGS Gen WO Allocate Purch Notes Configurator Blanket

- In this example, sales order 204 is marked as approved, set as editable at header level due to this user being in the SOAPP security group. All of sales order's 204 lines will show as approved, and as view only.

Sales Order Dashboard (PLA)									
<div>  <div> <input checked="" type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Ship </div> <div> <div>Customer On Hold</div> <div>Ready To Ship</div> </div> </div>									
<div> <div>All Open SOs</div> <div>Due Today & Past Due</div> <div>Sales Statistics</div> </div>									
Drag a column header here to group by that column									
Customer	Customer Name	Line Type	Terms	Qty On H...	Order No	Approved	On Hold	On Hold Reason	
→ 001000	TEXAS CUSTOM	S	NET30	0.00	0000206	<input type="checkbox"/>	<input type="checkbox"/>		
GE	GENERAL ELECTRIC	S	NET 30	40.00	0000002	<input type="checkbox"/>	<input type="checkbox"/>		
GE	GENERAL ELECTRIC	S	NET 30	40.00	0000002	<input type="checkbox"/>	<input type="checkbox"/>		
BMF	BERGER METAL FABRICATION	S	NET30	10.00	0000204	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
AND	ANDERSON WINDOWS	S	NET30	1.00	0000203	<input type="checkbox"/>	<input type="checkbox"/>		
GE	GENERAL ELECTRIC	S	NET 30	40.00	0000002	<input type="checkbox"/>	<input type="checkbox"/>		
GE	GENERAL ELECTRIC	S	NET 30	40.00	0000002	<input type="checkbox"/>	<input type="checkbox"/>		
BMF	BERGER METAL FABRICATION	S	NET30	10.00	0000204	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
GE	GENERAL ELECTRIC	S	NET 30	40.00	0000002	<input type="checkbox"/>	<input type="checkbox"/>		
BMF	BERGER METAL FABRICATION	S	NET30	10.00	0000204	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
GE	GENERAL ELECTRIC	S	NET 30	40.00	0000002	<input type="checkbox"/>	<input type="checkbox"/>		
001000	TEXAS CUSTOM	S	NET30	0.00	0000202	<input type="checkbox"/>	<input type="checkbox"/>		
BMF	BERGER METAL FABRICATION	S	NET30	10.00	0000204	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
GE	GENERAL ELECTRIC	S	NET 30	40.00	0000002	<input type="checkbox"/>	<input type="checkbox"/>		
FRT	FREIGHTLINER TRUCKS	S	NET30	126.00	0000201	<input type="checkbox"/>	<input type="checkbox"/>		
BMF	BERGER METAL FABRICATION	S	NET30	10.00	0000204	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
BMF	BERGER METAL FABRICATION	S	NET30	10.00	0000204	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
XEROX	XEROX	S		0.00	0000031	<input type="checkbox"/>	<input type="checkbox"/>		
XEROX	XEROX	S		0.00	0000032	<input type="checkbox"/>	<input type="checkbox"/>		
XEROX	XEROX	S		0.00	0000033	<input type="checkbox"/>	<input type="checkbox"/>	Field 1 data change. Change	
XEROX	XEROX	S		0.00	0000034	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
XEROX	XEROX	S		0.00	0000035	<input type="checkbox"/>	<input type="checkbox"/>		
XEROX	XEROX	S		0.00	0000036	<input type="checkbox"/>	<input type="checkbox"/>		
XEROX	XEROX	S		0.00	0000037	<input type="checkbox"/>	<input type="checkbox"/>		
XEROX	XEROX	S		100.00	0000038	<input type="checkbox"/>	<input type="checkbox"/>		
TECK	TECKTRONIX INC.	S		20.00	0000039	<input type="checkbox"/>	<input type="checkbox"/>		
XEROX	XEROX	S		22.00	0000040	<input type="checkbox"/>	<input type="checkbox"/>		

- Much like the core order entry screen, the dashboard only allows one checkbox to be checked for each sales order, either approved or on hold that have been added or saved since the project was installed.
- Toggling a given sales order's approved or on hold checkbox will toggle the other checkbox and apply it to the entire sales order. i.e. If on sales order 204, a user unchecks the approved checkbox, the script will automatically uncheck all lines for SO 204, and check the on hold checkbox for those same lines.

Order Entry Tables Maintenance

Exit

Please Select a Table

- State Taxable Table
- State Taxable by Tax Category
- RMA Services
- Warranty Terms
- Shipping Charges
- Order Number Range Code
- Product Lines & Branches
- Freight Rate Table
- User Fields
- Customs Invoice Forms
- Commodity Table
- Container Table

Order Entry - User Fields

Order Header Order Line

Prints On:

Field Label	Acknowledgment	Packing List	Invoice	Validate	Required
User Field 1: On Hold Reason	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User Field 2: USER FIELD 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User Field 3: USER FIELD 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User Field 4: USER FIELD 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User Field 5: USER FIELD 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ORDSUSR Save Apply Tables Val Tables Exit

- User field 1 (here titled “On Hold Reason”) caption can be set in Company Options (Standard) > Order Entry Table Maintenance > User Fields, under the header section. This data is read from whatever is in the user field 1 textbox on the order header screen. This dashboard writes back to this core screen.

Order Entry System - Open Orders

Order Number: 0000033, Customer ID: XEROX, ShipTo ID: , Language: , Order Currency: USD, Exchange Rate: 0.00000, Catalog Currency: USD, Buying Group: , Order Type: , Credit Limit: \$ 0

Blanket Order: , From Loc: , To Loc: , Shipping Hold: ☐

Bill To Address: XEROX, 9000 COPY CAT, P.O. BOX 777893B, 1 data change. Change, NEW YORK, NY, HOWARD LEE CORDELL III, Contact Name: , Email: , Bill Buying Grp: ☐ Non US

ShipTo Address: XEROX, 9000 COPY CAT, Address 1: , Address 2: , Address 3: , Address 4: , Address 5: 1 data change. Change, Non US: ☐

Order Date: 3/17/2021, Due Date: 3/17/2021, Customer PO: , GS Quote #: , Quote Log #: , Area: , Branch: , Sales Rep: , Carrier: , Service Type: , Mark Shipment: , Freight Term: , Do Not Allow Over Shipment of Open Quantity on Sales Orders: ☐

Buttons: Save, Delete, Add/Addr, Print, Lines, User Fields, Taxes, Freight, Order History, Email, Comments, Payment, Drop POs, Script 1, Notes, WF View

Header User Fields Dialog:

Order: 33

On Hold Reason: Field 1 data change. Change

USER FIELD 2: , USER FIELD 3: , USER FIELD 4: , USER FIELD 5:

Buttons: Save, Script 1, Script 2, Script 3

Footer: ORD200 - 0E50200A, GAB IS ACTIVE, FUJL, ORD200 - 061721.1400

- *****NOTE***:** If this field's value is changed while someone else has the same sales order open on the core screen, changes will not be reflected on that core order header screen until that user either relaunches the screen, or changes the sales order selected, and goes back to it.

Scenarios of when script writes to tables

Below shows all the instances that each of the 4 tables this project uses are written to/read from (2 core and 1 custom). Custom table starts with "GCG"

	JOB_HEADER	GCG_6573_SO_LINE_APP	SO_LINE_APPROVAL
SO Header: Check “approved” or uncheck “on-hold”	Removes on hold flag for all work orders tied to the given sales order lines’ on screen	If record exists (sales order and line combination) updates accordingly i.e. flag it as approved, and remove on hold flag.	Flags all sales order & line combinations as approved.
SO Header: Uncheck “approved” or check “on-hold”	Adds on hold flag for all work orders tied to the given sales order lines’ on screen	If record exists (sales order and line combination) updates accordingly i.e. remove approved flag, and add on hold flag.	Flags all sales order & line combinations as not approved.
SO Header: Save Order Checks states of checkboxes (if neither is marked or both are checked will cancel operation and warn user).	Reads check boxes and writes accordingly (update on hold flag for all work orders tied to the given sales order lines’ on screen).	If sales order/ line combo is being approved for the first time, will record today’s date as well as write appropriately. Any SO line records that were not previously in this table will be added, otherwise will just update the entry with the new flag values.	Flags all sale order/ line combinations appropriately
Dashboard: Toggle “Approved” or Toggle “On Hold”	Updates on hold flag for all work orders tied to the given sales order	Updates approved and on hold flags for sales order/line combo accordingly. New sales order/line combo must be added via core screen, which will not allow any records to be saved that are not marked one way or the other.*	Flags all sales order/line combos accordingly

	ORDER_HEADER
User field 1 value is changed	Writes to the sales order User_1 Field

*The dashboard will not be writing new entries to the custom table that aren't already in there. Ensure that any new lines that are added to a sales order are added through the core screen so that either the approved checkbox or on hold checkbox is checked. This way the new line can be added to the custom table. If a sales order has neither checkbox checked, then either the SO was added via some other method not from the cores screen, or the SO was created prior to installing this project. To fix, user should open those sales orders up in the core order header screen, check the box desired, and save.