

ARC ID – 6601 Sales Order User and Phone Validation

Arturo Almaguer, January 2022

Customer: Daystar Products

Business Case: Customer is looking for a way to keep better track of who created the order and who modified the order on new and existing SOs.

This project is launched off SO master populate hook, order selected hook and pre-save hook.

Project's step by step

Scenario 1: Creating a new Sales Order

1. 'Order Sort' and 'Order Sort 2' captions have been renamed.
2. After the user clicks on the 'Save' button, the program will validate if there is a contact phone number in the SO.
 - If 'Contact Number' field is blank, get the phone number set up for the customer in AR Customer Master.
 - If 'Contact Number' field has a number already, it won't be changed.
3. User ID will be stored in 'Creation User' field.

Order Entry System - Add Orders

Order Number: 0000185, Customer ID: DAO, 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
DIAMOND DAVE'S LTD.
777 HEAVEN
P.O. BOX 777
ODELL, TX 77777777
USA
DAVID ALAN O'DELL SR.
Contact Name: , Email: , Contact Phone: , Ext:

ShipTo Address: ☐ Non US
DIAMOND DAVE'S LTD.
777 HEAVEN
P.O. BOX 777
ODELL, TX 77777777
USA
DAVID ALAN O'DELL SR.
Attention:

Order Date: 1/26/2022, Due Date: 1/26/2022, Customer PO: , Contract: , Price Class: , Discount: 0.0000, Order Discount: 0.0000, Price Catg: , Margin: .0000, Project: , Creation User: , Last-Change User: , Facility Code: , Last Item No.: 000, No Back Orders: ☐, Insurance: ☐, Process Group: , Area: , Branch: , Sales Rep: , Comm Type: , Terms: , Waybill Number: , 3rd Party Freight: , FOB Point: , Carrier: , Service Type: , Ship Via: UPS RED, Carrier Account: , Primary Group: , Secondary Group: , Mark Shipment: DAVID ALAN O'DELL SR., Freight Zone: , Shipped Date: , Do Not Allow Over Shipment of Open Quantity on Sales Orders: ☐

Save, Delete, Add/Addr, Print, Lines, User Fields, Taxes, Freight, Order History, Email, Comments, Payment, Drop POs, Script 1, Script 2, Script 3

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Scenario 2: Opening an existing Sales Order

If the user opens an existing SO, they would be able to identify the user who created the SO and the user who last modified the SO too.

Note

If 'Creation User' field is blank, it would mean the SO was created and imported by the customer's web interface, so basically this field would let any user know if the SO was manually created or imported by the web interface.

Order Entry System - Open Orders

Order Number: 0000180
Customer ID: DAO
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: ☐
DIAMOND DAVE'S LTD.
777 HEAVEN
P.O. BOX 777
ODELL, TX 77777777
USA
DAVID ALAN O'DELL SR.
Contact Name:
Email:
ShipTo Address: ☐ Non US: ☐
Name: DIAMOND DAVE'S LTD.
Address 1: 777 HEAVEN
Address 2: P.O. BOX 777
Address 3:
Address 4:
Address 5:
City/State/Zip: ODELL, TX 77777777
Country: USA
Attention: DAVID ALAN O'DELL SR.
Contact Phone: 987654321
Ext:
Order Date: 1/26/2022
Due Date: 1/26/2022
Customer PO:
Contract:
Price Class:
Discount: 0.0000
Order Discount: 0.0000
Price Catg:
Discount All Items: ☐
Margin: .0000
Project:
Creation User: SUPERVSR
Last-Change User: TEST
Facility Code:
Last Item No.: 000
No Back Orders: ☐
Insurance: ☐
Process Group:
Area:
Branch:
Sales Rep:
Comm Type:
Terms:
Waybill Number:
3rd Party Freight:
FOB Point:
Carrier:
Service Type:
Ship Via: UPS RED
Carrier Account:
Primary Group:
Secondary Group:
Mark Shipment: DAVID ALAN O'DELL SR.
Freight Zone:
Shipped Date:
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
Script 1 Script 2 Script 3

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