Objective: Create a dashboard with 5 tabs where users can reconcile various records. They will do so by using a bulk update button that brings user to a pop-up window where they can enter a list of Purchase Order, Sales Order, Tracking ID or Item Fulfillment numbers. User will then hit an update button on the pop-up window and the recon fields should update for all records entered. In addition, users should be able to edit and update fields noted editable.

❖ Dashboard Tabs – display any record falling on the searches below
- Tab 1 - Handoff Recon (id: customsearch_purchaseorder_handoff_recon)
- Tab 2 - EOD PO Recon (id: customsearch_eod_purchase_order_recon)
- Tab 3 - EOD Box Recon (id: customsearch_eod_box_recon)
- Tab 4 - Layaway Recon (id: customsearch_layaway_recon)
- Tab 5 - Pick-Up Recon (id: customsearch_pick_up_recon)

==**User Stories**==

1. Handoff Recon
   a. User loads dashboard tab
   b. User hits 'Bulk Recon' button
   c. A pop-up page window where user can enter a list of **purchase order** numbers (trandid)
      i. If purchase order # is not found on the current tab's list of records, then return error 'PO # not found'
   d. User hits 'Update'
      i. Hand off Date/Time (custbody_handoff_date_time) updates to today's date/time for all records submitted
   e. Dashboard reloads/refreshes current tab
2. EOD PO Recon
   a. User loads dashboard tab
   b. User hits 'Bulk Recon' button
   c. A pop-up window opens where user can enter a list of **purchase order** numbers (trandid)
      i. If purchase order # is not found on the current tab's list of records, then return error 'PO # not found'
   d. User assigns **all** records on a field called OS Recon Location (custbody_os_recon_location) via a drop down
   e. User hits 'Update'
      i. OS Recon Location (custbody_os_recon_location) should update to value user selects in the OS Recon Location Drop Down
   f. Dashboard reloads/refreshes current tab
3. EOD Box Recon
   a. User loads dashboard tab
   b. User hits 'Bulk Recon' button
   c. A pop-up window opens where user can enter a list of **tracking IDs** (custrecord_tracking_id)

               i.   If tracking ID is not found on the current tab's list of records, then return error 'Tracking ID not found'

      d.   User hits 'Update'

               i.   Customer Package Record field EOD Recon (custrecord_eod_box_recon) should update to the user that submits the update

      e.   Dashboard reloads/refreshes current tab

4. Layaway Recon

      a.   User loads dashboard tab

      b.   User hits 'Bulk Recon' button

      c.   A pop-up window opens where user can enter a list of **sales order** numbers

               i.   If sales order is not found on the current tab's list of records, then return error 'Sales order not found'

      d.   User hits 'Update'

               i.   Layaway Recon Date (custbody_layaway_recon_date) should update to today's date

      e.   Dashboard reloads/refreshes current tab

5. Pick-Up Recon

      a.   User hits 'Bulk Recon' button

      b.   A pop-up window opens where user can enter a list of **item fulfillment internal IDs (internalid)**

               i.   If internal ID is not found on the current tab's list of records, then return error 'Item Fulfilment not found'

      c.   User hits 'Update'

               i.   The Last Pick-Up Recon Date (custbody_last_pick_up_recon_date) should update to today's date for all records submitted

      d.   Dashboard reloads/refreshes current tab

Features:

➢ Highlighting

Tab	Criteria	Color (html)	Type
Handoff Recon	Hand off Date/Time (custbody_handoff_date_time) is null and ship date (actualshipdate) is before today	#ffd1e9	Background
EOD Purchase Order Recon	OS Recon Location (custbody_os_recon_location) is null and ship date (actualshipdate) is before today	#ffd1e10	Background
EOD Box Recon	EOD Recon (custrecord_eod_box_recon) is null and date received (custrecord245) is before today	#ffd1e11	Background
Layaway Recon	Layaway Recon Date (custbody_layaway_recon_date) > 14 days ago or Layaway Recon Date (custbody_layaway_recon_date) is null	#ffd1e12	Background
Pick-Up Recon	item fulfillment date (trandate) > 7 days ago and item fulfillment recon (custbody_last_pick_up_recon_date) is null or item fulfillment recon (custbody_last_pick_up_recon_date) > 7 days ago	#ffd1e13	Background

➤ **Filters**

Tab	Name	Source from	Field Name	Field ID
EOD Box Recon	Received Location	Custom Package Record	Revived Location	custrecord_received_location_
Pick-Up Recon	Pick-Up Location	Item Fulfillment	Pick-Up Location	custbody_pickup_location

➤ **Buttons (display on all tabs)**

Display Name	Function
Update	updates record for any fields value changed
Bulk Recon	opens new pop-up window where user enters a list of records

➤ **Dashboard Columns**

❖ **Handoff Recon**

Display Name	Field Name	Field ID	Source From	Field Type	Notes
Hand off Date	Hand off Date/Time	custbody_handoff_date_time	Purchase Order	Editable	
Vendor	Vendor	enity	Purchase Order	Inline	
PO #	document number	tranid	Purchase Order	Hyperlink	
Sales Order	document number	tranid	Created from (createdfrom)	Hyperlink	
Customer	Customer	enity	Created from (createdfrom)	Hyperlink	omit number in front of name
Delivery Date	Delivery Date	custbody6	Purchase Order	Inline	
Date to Ship	Date to Ship	custbody110	Created from (createdfrom)	Inline	
BE Engraving Status	BE Engraving Status	custbody348	Created from (createdfrom)	Inline	
Delivery Instructions	Delivery Instructions	custbody194	Purchase Order	Inline	
Layaway	Layaway	custbody111	Created from (createdfrom)	Inline	
CS Fulfillment Status	CS Fulfillment Status	custbody140	Created from (createdfrom)	Inline	
Status	Status	status	Purchase Order	Inline	
Pick-Up Location	Pick-Up Location	custbody_pickup_location	Created from (createdfrom)	Inline	
Date Needed by Vendor	Date Needed by Vendor	custbody59	Purchase Order	Inline	
Date Shipped from Vendor	Date Shipped from Vendor	custbody209	Purchase Order	Inline	

❖ EOD Purchase Order Recon

Display Name	Field Name	Field ID	Source From	Field Type	Notes
OS Recon Location	OS Recon Location	custbody_os_recon_location	Purchase Order	Editable	
Vendor	Vendor	enity	Purchase Order	Inline	
PO #	document number	tranid	Purchase Order	Hyperlink	
Sales Order	document number	tranid	Created from (createdfrom)	Hyperlink	
Customer	Customer	enity	Created from (createdfrom)	Hyperlink	omit number in front of name
Delivery Date	Delivery Date	custbody6	Purchase Order	Inline	
Date to Ship	Date to Ship	custbody110	Created from (createdfrom)	Inline	
BE Engraving Status	BE Engraving Status	custbody348	Created from (createdfrom)	Inline	
Delivery Instructions	Delivery Instructions	custbody194	Purchase Order	Inline	
Layaway	Layaway	custbody111	Created from (createdfrom)	Inline	
CS Fulfillment Status	CS Fulfillment Status	custbody140	Created from (createdfrom)	Inline	
Status	Status	status	Purchase Order	Inline	
Pick-Up Location	Pick-Up Location	custbody_pickup_location	Created from (createdfrom)	Inline	
Date Needed by Vendor	Date Needed by Vendor	custbody59	Purchase Order	Inline	
Date Shipped from Vendor	Date Shipped from Vendor	custbody209	Purchase Order	Inline	

❖ EOD Box Recon

Display Name	Field Name	Field ID	Source From	Field Type	Notes
Tracking ID	Tracking ID	custrecord_tracking_id	Custom Package Record	Editable	
Received Location	Received Location	custrecord_received_location_	Custom Package Record	Inline	
Undelivered	Undelivered	custrecord_undelivered	Custom Package Record	Inline	
Transaction	Transaction	custrecord_transaction_record	Custom Package Record	Hyperlink	
Service Type	Service Type	custrecord_package_service_type	Custom Package Record	Inline	

❖ Layaway Recon

Display Name	Field Name	Field ID	Source From	Field Type	Notes
Sales Order	document number	trandid	Sales Order	Hyperlink	
Last Name	Last Name	lastname	Customer	Inline	
First Name	First Name	firstname	Customer	Inline	
Recon Date	Layaway Recon Date	custbody_layaway_recon_date	Sales Order	Editable	
Date to Ship	Date to Ship	custbody110	Sales Order	Inline	
RTS	RTS: Pending CS Action	custbody351	Sales Order	Inline	
Product Category	Product Category	custbodyproduct_category	Sales Order	Inline	

❖ **Pick-Up Recon**

Display Name	Field Name	Field ID	Source From	Field Type	Notes
Date	Date	trandate	Item fulfillment	Inline	
Item fulfillment #	document number	trandid	Item fulfillment	Hyperlink	
Sales Order	document number	trandid	Created from (createdfrom)	Hyperlink	
Customer	Customer	enity	Customer	Hyperlink	omit number in front of name
Pick-Up Location	Pick-Up Location	custbody_pickup_location	Item fulfillment	Inline	
Recon Date	Last Pick-Up Recon Date	custbody_last_pick_up_recon_date	Item fulfillment	Editable	