



CORE² DYNAMICS

Key User Documentation

Procurement and Logistics – Business Central Core V5.00

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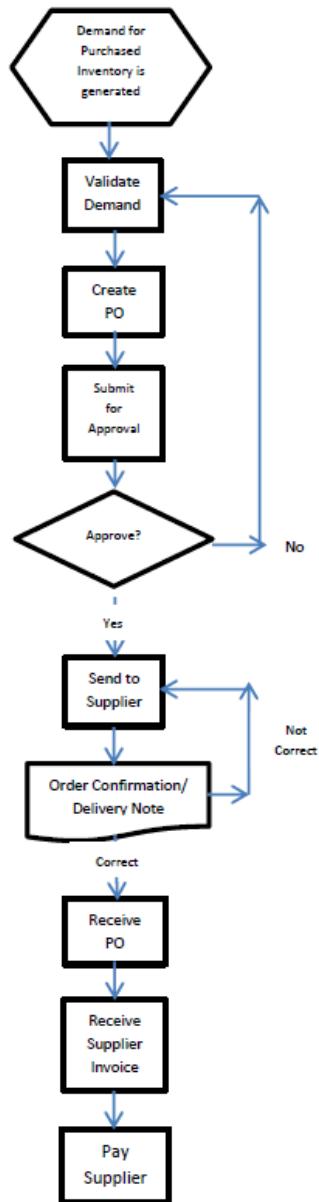
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1 Purchase

1.1 Master Process for Purchase and Procurement



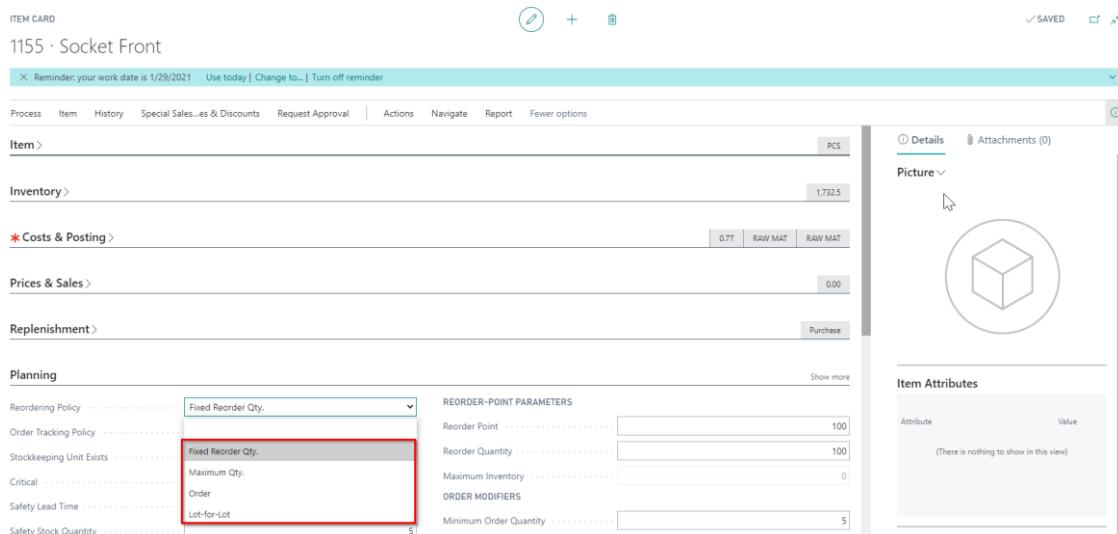
1.2 Requisition Management

1.2.1 Calculating the Requisition Plan

There are two different ways to calculate the requisition:

Using the standard BC requisition worksheet functionality as described below and adjusting the planning parameters at each item manually if necessary. To adjust the planning parameters ABC- and XYZ analysis reports are used. The planning parameters that are normally used in the companies are:

- Reordering Policy = "Order" without additional parameters
- Reordering Policy = "Fixed Reorder Qty." with parameters "Reorder Quantity" and Reorder Point.
- Reorder Policy = "Lot-for-lot" with parameters "Lot Accumulation Period" and "Rescheduling Period".



1.2.2 ABC- and XYZ Analysis Reports (CORE modification)

To adjust planning parameters, Phoenix Mecano companies use ABC- and XYZ analysis for getting adequate results. For the CORE exist two option fields "ABC-Status" (options A,B,C) and "XYZ-Status" (options X,Y,Z). The field "ABC-Status" will be filled with a report as described below. The field "XYZ-Status" has to be filled manually.

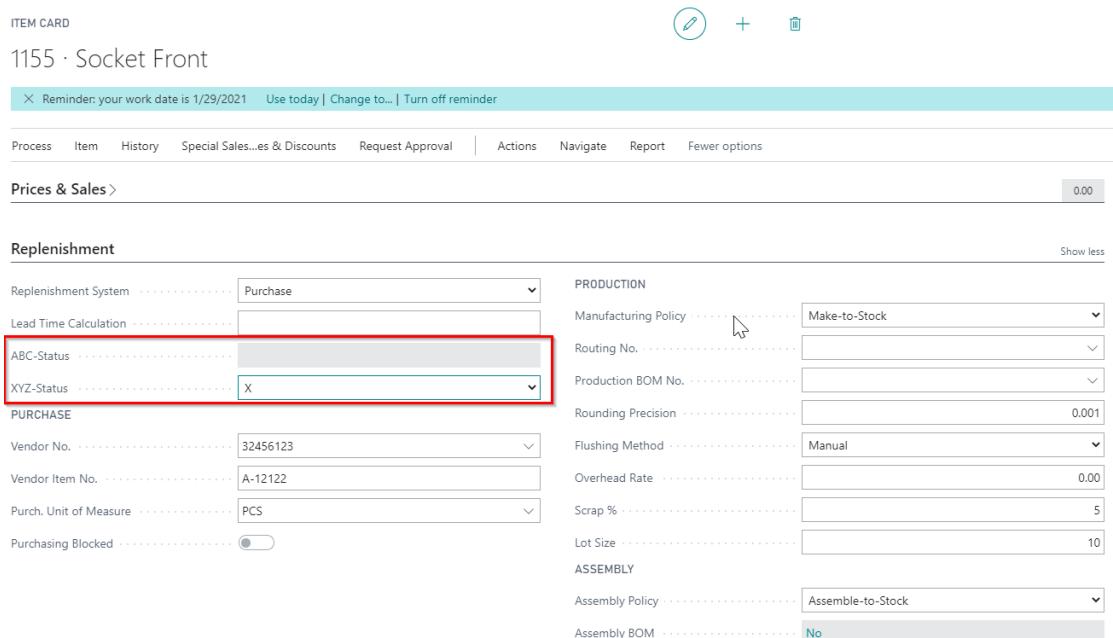
Any algorithm programmed for calculation is treated as local requirement for XYZ:

With the information of the two fields the planning parameters are adjusted. This is done by exporting the items, changing the planning parameters in Excel and reimporting them.

For import- and export the Configuration Package functionality (Rapid Start) can be used. If "Stockkeeping Units" are setup, the planning parameters of the "Stockkeeping Units" must also be changed.

The two fields have been added to the "Item Card" and "Item List" called "ABC-Status" and "XYZ-Status". They can both be found in the "Item Card" in the FastTab Replenishment.

Card:



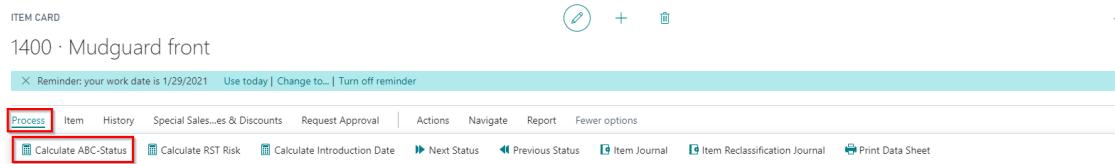
List:

The screenshot shows the 'ITEMS' list for CRONUS US DEMO, Inc. The top navigation bar includes Finance, Cash Management, Sales, Purchasing, Setup & Extensions, Intelligent Cloud Insights, and more. Below the navigation is a toolbar with items like All, Search, New, Delete, Process, Item, Request Approval, Inventory, Attributes, Page, Actions, Navigate, Report, and Fewer options. A reminder message at the top says 'Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder'. The main table lists items with columns: No. #, Production BOM No., Routing No., Base Unit of Measure, Cost is Adj., Unit Cost, Unit Price, Vendor No., Planning Person, QC required, ABC-Status, XYZ-Status, GTIN, and RST Risk. The ABC-Status and XYZ-Status columns are highlighted with a red box. The table shows various items with their respective values across these columns.

No. #	Production BOM No.	Routing No.	Base Unit of Measure	Cost is Adj.	Unit Cost	Unit Price	Vendor No.	Planning Person	QC required	ABC-Status	XYZ-Status	GTIN	RST Risk
1000	1000	1000	PCS	<input type="checkbox"/>	350.595	4.000.00			No	A	X	123456789	
1000COPY	1000	1000	PCS	<input type="checkbox"/>	350.595	4.000.00			No	C	X	1234567891	
1001	1000	1000	PCS	<input type="checkbox"/>	350.595	4.000.00			No	C			
1100	1100	1100	PCS	<input type="checkbox"/>	129.671	1.000.00	20000		No	C			
1110			PCS	<input type="checkbox"/>	1.05	0.00	30000	AHA	No	C			T
1120			PCS	<input type="checkbox"/>	2.00	0.00	01587796		No	C			
1150	1150	1150	PCS	<input type="checkbox"/>	12.441	500.00			No	C			
1151			PCS	<input type="checkbox"/>	0.45	0.00	32456123		No	C	Y		
1155			PCS	<input type="checkbox"/>	0.77	0.00	32456123		No	C	X		
1160			PCS	<input type="checkbox"/>	1.23	0.00	01587796		No	C			
1170			PCS	<input type="checkbox"/>	1.75	0.00	20000		No	C			

The "XYZ-Status" is an option field with the options "X,Y,Z". The value is selected manually by the user.

The "ABC-Status" cannot be changed manually. It is calculated. The action for this can be found under Process → Calculate ABC-Status on item card.



And on item list under Process → Calculate ABC-Status.

No. ↑	Production BOM No.	Routing No.	Base Unit of Measure	Unit Price	Vendor No.	Planning Person	QC required	ABC-Status	XYZ-Status	GTIN	RST Risk	Default Deferral Template
1000	1000	1000	PCS	4.000,00			No	A	X	123456789		
1000COPY	1000	1000	PCS	4.000,00			No	C	X	1234567891		
1001	1000	1000	PCS	350.595	4.000,00		No	C				

The algorithm for the ABC-Status will be established as follows:

- The "volume of usage" is calculated (calculation: Unit Cost * Quantity in base unit of measure). Usage means either the consumption in a production order, or the sale of items, i.e. the bases for this calculation are the "Item Ledger Entries" that are created because of consumption or sale.
- The volume is calculated for every item for the last 12 months.
- The resulting list is sorted according to the volume. The items with the highest volumes first, downwards.
- The total volume is calculated and defines the 100 %.
- All items have "ABC-Status" = A that are in the range of the first item, down to the item where the sum of the volume is less or equal 80 %.
- The item belonging to the next 15 % are categorized as B.
- All other items are categorized as C.

ITEM CARD

1151 · Axle Front Wheel

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Item History Special Sales...es & Discounts Request Approval Actions Name

[Item >](#)

[Inventory >](#)

[* Costs & Posting >](#)

[Prices & Sales >](#)

Replenishment

Replenishment System	Purchase
Lead Time Calculation	
ABC-Status	C
XYZ-Status	Y

PURCHASE

1.2.3 Reports for calculation ABC- and RST-Status

The reports for calculation RST-and ABC-Status in the items as well as the ABC-Status calculation for the customer and vendor have all received a date field in the request page.

CALCULATE ABC-STATUS ITEM ↗

Options

Date	1/29/2021	<input type="button" value="..."/>
------------	-----------	------------------------------------

Filter: Item

x No.	<input type="button" value="..."/>
------------	------------------------------------

+ Filter...

Filter totals by:

+ Filter...

The user can define a date and from there the ABC-Status is calculated for the past twelve months, going back from the user defined date. For the RST-Status it is six months going back from the user defined date.

Instead of calculating one year back from the date defined by the user for the ABC-Status, calculation will now go back one year and jump forward one day, so that the calculation via ledger entries is correct. Same goes for the RST-Status, where calculation goes back 6 months and then jumps forward one day.

Action for the batch report will be found on the Item Card and Item List.

Test case:

Make sure the new fields "ABC-Status" and "XYZ-Status" can be found on the Item List and Item Card.

The "XYZ-Status" should be editable on the card, as this field should be filled by the user. "ABC-Status" should not be editable, as the field will be filled via the new batch report. Before running the report, take ten items and manually calculate, which status each item should have, A, B or C.

Note down your results. Now run the new report and set the filter on the field "No." for your ten items. After the report has finished, compare the results on the item card or list with your own. If you have manually calculated it right, the report should have given the same ten items the same status.

Refere to testscripts: TSTPL0024, TSTPL0041, TSTPL0055, TSTPL0056

1.2.4 Planning Parameters

In BC, the Requisition Management functionality helps automate and coordinate the purchasing process. The requisition worksheet is the central processing tool, and it offers the following features:

- Calculates a current and detailed purchase order plan upon demand
- Creates actual purchase orders from the plan's requisition lines
- Manages stockkeeping units that are replenished by transfer and creates the corresponding transfer orders
- Helps manage drop shipments and special orders

- Manages designated purchase order lines from other areas of the application
- Manages manually created requisition lines
- Controls the flow of relevant information between departments

The screenshot shows the 'Item Card' interface for item 1151 · Axle Front Wheel. At the top, there are navigation icons: a back arrow, a pencil icon for editing, a plus sign for adding new items, and a trash bin icon. Below the header, a reminder message says 'Reminder: your work date is 1/5/2021' with options to 'Use today', 'Change to...', or 'Turn off reminder'. The main content area has tabs for 'Process', 'Item', 'Prices & Discounts', 'Request Approval', and 'More options'. The 'Planning' tab is currently selected. It contains several groups of parameters:

- Reordering Policy:** Fixed Reorder Qty.
- Reserve:** Optional
- Order Tracking Policy:** None
- Stockkeeping Unit Exists:** No
- Dampener Period:** (empty field)
- Dampener Quantity:** 0
- Critical:** (switch is on)
- Safety Lead Time:** (empty field)
- Safety Stock Quantity:** 5
- Planning Person:** (dropdown menu)
- Reorder-Point Parameters:**
 - Reorder Point: 100
 - Reorder Quantity: 100
 - Maximum Inventory: 0
 - Overflow Level: 0
 - Time Bucket: 1M
- Order Modifiers:**
 - Minimum Order Quantity: 5
 - Maximum Order Quantity: 100
 - Order Multiple: 2
- Lot-for-Lot Parameters:**
 - Include Inventory: (switch is on)
 - Lot Accumulation Period: (empty field)
 - Rescheduling Period: (empty field)

The planning parameters are setup in the item card, fasttab "Planning". The most important parameters are:

- The **Reordering Policy** field is used to calculate the lot size for each planning period when this item must be replenished.
- **Reorder Quantity** field is used as the standard lot size for order proposals.
- **Reorder Point** field sets the inventory level at which the planning engine will suggest a new purchase order.
- **Time Bucket** field specifies the planning horizon that the planning engine must consider when either the Fixed Reorder Qty. or Maximum Qty. reordering policies are used.
- **Dampener Period:** This field is used to avoid minor rescheduling of existing supply out in time. Changes from the supply date until one dampener period from the supply date will not generate any action messages.
- **Dampener Quantity:** Specifies a dampener quantity to block insignificant change suggestions for an existing supply if the quantity by which the supply would change is lower than the dampener quantity.

- **Rescheduling Period:** This field is used to determine whether the action message should reschedule an existing order or cancel it and create a new order. The existing order will be rescheduled within one rescheduling period before the current supply and until one rescheduling period after the current supply.
- **Lot Accumulation Period:** With reordering policy Lot-for-Lot, this field is used to accumulate multiple supply needs into one supply order. From the first planned supply, the system accumulates all supply needs in the following lot accumulation period into one supply, which is placed on the date of the first supply. Demand outside the lot accumulation period is not covered by this supply.

1.2.5 Requisition Worksheet

The requisition worksheet is used to calculate a plan that determines which items to order, the quantities and when to order items. This worksheet includes two main batch jobs.

General Remark

Please take note that all different sales status (open, released, pending prepayment, pending approval) generate demands when requisition worksheet or planning worksheet were run.

Calculate Plan Batch Job

Calculates a requisition plan for items and stockkeeping units set up for replenishment by a purchase or transfer order. The batch job performs the following functions:

- Investigates the demand and supply situation of the item and calculates the projected available balance. The balance is defined as: Inventory + Scheduled Receipts + Planned Receipts – Gross Requirement.
- Determines the net requirements for the item.
- Creates an item replenishment plan to fulfill its net requirements. The plan is presented in the requisition worksheet as requisition lines accompanied by action messages that suggest specific user actions.

CALCULATE PLAN - REQ. WKSH.

Saved Settings >

Options

Starting Date

Ending Date

Use Forecast

Exclude Forecast Before

Respect Planning Parameters for S...

Filter: Item

× No.

× Search Description

[+ Filter...](#)

Filter totals by:

× Location Filter

[+ Filter...](#)

OK **Cancel**

REQUISITION WORKSHEETS

× Reminder: your work date is 1/29/2021 [Use today](#) | [Change to...](#) | [Turn off reminder](#)

Name

[Manage](#) [Process](#) [Report](#) [Drop Shipment](#) [Special Order](#) [Line](#) [Item Availability by](#) [Actions](#) [Navigate](#) [Report](#) [Fewer options](#)

[Calculate Plan...](#) [Reserve](#) [Carry Out Action Message...](#)

Type	No.	Message	Meas...	Cutting Item	Description	Location Code	Quantity	Unit of Measure	Direct Unit Cost	Planned Date	Due Date
Item	1850	New	<input checked="" type="checkbox"/>	—	Saddle	BLUE	410	PCS	7.20	12/31/2019	It
Item	1850	New	<input checked="" type="checkbox"/>	—	Saddle	BLUE	94	PCS	7.20	1/29/2021	It

Each requisition line is the result of a unique, time-specific supply and demand situation. Additionally, each line can be a unique combination of planning parameters.

REQUISITION WORKSHEETS

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Name DEFAULT

Manage Process Report Drop Shipment Special Order Line Item Availability by Actions Navigate Report Fewer options

Type	No.	Action Message	Acc. Action	Message	Cutting Item	Description	Location Code	Original Quantity	Quantity	Unit of Measure Code	Direct Unit Cost	Original Due Date	Due Date
Item	1000	Cancel	<input checked="" type="checkbox"/>	—	Bicycle	BLUE	3	0	PCS	0.00	5/1		
Item	1000	Cancel	<input checked="" type="checkbox"/>	—	Bicycle	BLUE	5		PCS	0.00	6/1		
Item	80218	New	<input checked="" type="checkbox"/>	—	Hard Disk Drive	BLUE		101	PCS	3.60		1/2	
Item	1500	New	<input checked="" type="checkbox"/>	—	Lamp	BLUE		2	PCS	28.889		1/2	
Item	1850	New	<input checked="" type="checkbox"/>	—	Saddle	BLUE		410	PCS	7.20		12/	
Item	1850	New	<input checked="" type="checkbox"/>	—	Saddle	BLUE		94	PCS	7.20		1/2	
Item	70062	Change Qty.	<input checked="" type="checkbox"/>	—	cutted item	UNCUT		42	4	M	0.00	1/2	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim			100	PCS	1.05		12/	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim			100	PCS	1.05		12/	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim			200	PCS	1.05		12/	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim			200	PCS	1.05		12/	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim	BLUE		1,133	PCS	1.05		9/2	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim	BLU IF		1,133	PCS	1.05		10/	

Carry Out Action Message Batch Job

As soon as the purchasing agent is satisfied with the requisition worksheets lines, the Carry Out Action Msg.-Req. batch job is used to convert the lines to purchase or transfer orders. Changes to the requisition lines can be made before the batch job runs.

1.2.6 Planning and Req. Worksheet Addon (Modify Pages and New Page) (CORE modification)

In case an item has stockkeeping units (=SKU) for the specific location the FactBox "Item SKU FactBox" will be displayed in the Planning and / or Requisition Worksheet Line. The FactBox "Item Details – Planning" will be hidden.

REQUISITION WORKSHEETS

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Name DEFAULT

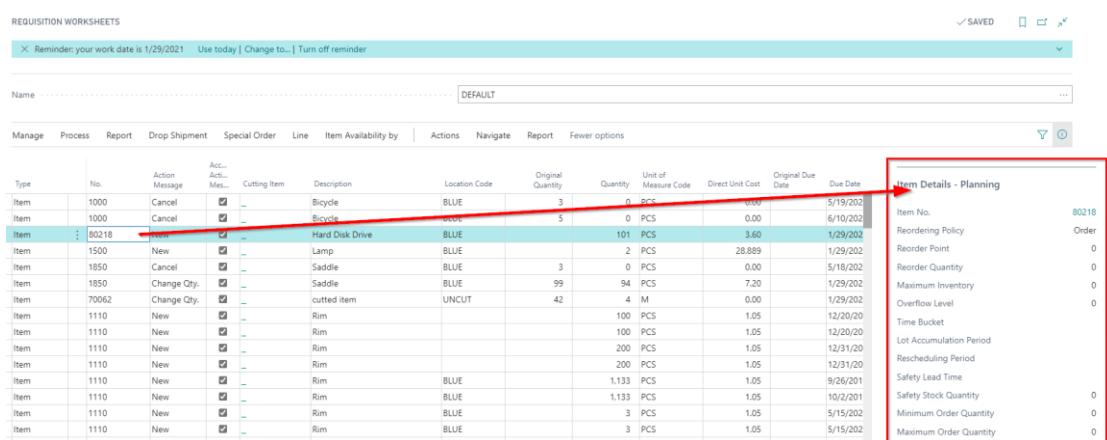
Manage Process Report Drop Shipment Special Order Line Item Availability by Actions Navigate Report Fewer options

Type	No.	Action Message	Acc. Action	Message	Cutting Item	Description	Location Code	Original Quantity	Quantity	Unit of Measure Code	Direct Unit Cost	Original Due Date	Due Date
Item	1000	Cancel	<input checked="" type="checkbox"/>	—	Bicycle	BLUE	3	0	PCS	0.00	5/19/2022	5/19/2022	
Item	1000	Cancel	<input checked="" type="checkbox"/>	—	Bicycle	BLUE	5	0	PCS	0.00	6/10/2022	6/10/2022	
Item	80218	New	<input checked="" type="checkbox"/>	—	Hard Disk Drive	BLUE		101	PCS	3.60		1/29/2022	
Item	1500	New	<input checked="" type="checkbox"/>	—	Lamp	BLUE		2	PCS	28.889		5/19/2022	
Item	1850	Cancel	<input checked="" type="checkbox"/>	—	Saddle	BLUE	3	0	PCS	0.00	5/19/2022	5/19/2022	
Item	1850	Change Qty.	<input checked="" type="checkbox"/>	—	Saddle	BLUE	99	94	PCS	7.20		1/29/2022	
Item	70062	Change Qty.	<input checked="" type="checkbox"/>	—	cutted item	UNCUT		42	4	M	0.00		1/29/2022
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim			100	PCS	1.05		12/20/2022	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim			100	PCS	1.05		12/20/2022	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim			200	PCS	1.05		12/31/2022	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim			200	PCS	1.05		12/31/2022	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim	BLUE		1,133	PCS	1.05		9/26/2021	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim	BLUE		1,133	PCS	1.05		10/20/2021	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim	BLUE		3	PCS	1.05		5/15/2022	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim	BLUE		3	PCS	1.05		5/15/2022	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim	BLUE		5	PCS	1.05		6/8/2020	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim	BLUE		5	PCS	1.05		6/8/2020	
Item	1110	New	<input checked="" type="checkbox"/>	—	Rim	BLUE		2	PCS	1.05		6/24/2022	

Item SKU FactBox
 Item No. 1000
 Location Code BLUE
 Vendor No. V00010
 Replenishment System Purchase
 Lead Time Calculation
 Reordering Policy Order
 Reorder Point 0
 Reorder Quantity 100
 Maximum Inventory 0
 Overflow Level 0
 Time Bucket 1W
 Lot Accumulation Period
 Rescheduling Period
 Safety Lead Time
 Safety Stock Quantity 0
 Minimum Order Quantity 0
 Maximum Order Quantity 0

In case an item has no stockkeeping units created for the specific location the FactBox "Item Details – Planning" will be displayed in the Planning and / or Requisition Worksheet Line. The FactBox "Item SKU FactBox" will be hidden.



Depending on the FactBox type opens the item card or the stockkeeping unit card (in an editable mode) if the user choose the related link for the item no. in the FactBoxes. Furthermore this fields have been added to the FactBox "Item SKU FactBox" and "Item Details – Planning":

- Vendor No,
- Lead Time Calculation
- Inventory
- Qty on Purch. Order
- Qty on Sales order
- Qty on Prod. Order
- Qty on Component
- Discrete Order Quantity
- Manufacturing Policy
- Qty in Transit
- Planned Order Receipt (Qty)
- FP Order Receipt (Qty)
- Rel. Order Receipt (Qty)
- Planned Order Release (Qty)
- Purch. Req. Receipt (Qty)
- Purch Req Release (Qty)
- Qty on Assembled Order

In case an item has no stockkeeping units created for the specific location the FactBox "Item Details – Planning" will displayed in the Planning and / or Requisition Worksheet Line. The following fields are added to this FactBox:

"Purchase (Qty.)"

"Sales (Qty.)"

1.2.7 *Vendor Item No. (CORE modification)*

It is possible to see and edit the BC standard field "Vendor Item No." on purchase document lines.

Therefore the field "Vendor Item No. (70)" will be provided (editable) in the table:

Purchase Lines (39)

The field "Vendor Item No. (70)" will be provided in the following pages for purchase document lines:

- Purchase order – Purchase Order Subform (54)
- Purchase quote – Purchase Quote Subform (97)
- Blanket purchase order – Blanket Purchase Order Subform (510)
- Purchase return order – Purchase Return Order Subform (6641)
- Purchase invoice – Purch. Invoice Subform (55)
- Purchase credit memo – Purch. Cr. Memo Subform (98)

1.2.8 *Responsibility for Planning (CORE modification)*

The items at Phoenix Mecano are assigned to different persons responsible for planning. They use different requisition worksheets and run the planning batch job only for her / his items. In order to do this a customization in the core was made.

Item card FastTab Planning and Item list:

The field "Planning Person" is inserted for the CORE (table "item") in the "Item card" and "Item List". The field contains the responsible purchaser (table relation to "Salesperson / Purchaser") for that item. The batch job "Calculate Plan..." is extended with the possibility to filter on the "Planning Person".

ITEM CARD

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Item History Special Sales...es & Discounts Request Approval Actions Navigate Report Fewer options

Prices & Sales > 500.00

Replenishment > Prod. Order

Planning Show less

Reordering Policy	Fixed Reorder Qty.
Reserve	Optional
Order Tracking Policy	None
Stockkeeping Unit Exists	Yes
Dampener Period	
Dampener Quantity	0
Critical	<input checked="" type="checkbox"/>
Safety Lead Time	
Safety Stock Quantity	5
Planning Person	

LOT-FOR-LOT PARAMETERS	
Include Inventory	<input checked="" type="checkbox"/>
Lot Accumulation Period	
Rescheduling Period	
REORDER-POINT PARAMETERS	
Reorder Point	100
Reorder Quantity	100
Maximum Inventory	0
Overflow Level	0
Time Bucket	1M
ORDER MODIFIERS	
Minimum Order Quantity	5
Maximum Order Quantity	100

Requisition –, Planning – and Subcontracting Worksheet:

The field "Planning Person" is also inserted to the "Requisition –", "Planning –" and "Subcontracting Worksheet" (table "Requisition Line").

PLANNING WORKSHEETS

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Name: DEFAULT

Manage Process Prepare Line Item Item Availability by More options

Warning	Due Date	Starting Date-Time	Ending Date-Time	Description	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status	Vendor No.	Planning Person
Emergency	8/13/2020	8/7/2020 10:20 AM	8/12/2020 4:00 PM	Front Wheel	56	Prod. Order	102135	Planned				
Emergency	8/13/2020	8/7/2020 10:20 AM	8/12/2020 4:00 PM	Back Wheel	56	Prod. Order	102136	Planned				
Emergency	8/13/2020	8/13/2020 8:00 AM	8/13/2020 12:00 ...	Chain Assy	56	Prod. Order	102137	Planned				
Emergency	8/13/2020	8/13/2020 8:00 AM	8/13/2020 12:00 ...	Brake	56	Prod. Order	102138	Planned				
Emergency	8/13/2020	8/10/2020 6:37 PM	8/12/2020 11:00 ...	Front Hub	56	Prod. Order	102143	Planned				
Emergency	8/13/2020	8/10/2020 6:37 PM	8/12/2020 11:00 ...	Back Hub	56	Prod. Order	102144	Planned				

Test case:

Look at the Item Card and check if the field "Planning Person" exists in the Tab Planning and if the table relation to the Salesperson / Purchaser (Table 13) is given.

When creating a new item line in one of the worksheets, the field "Planning Person" should be filled automatically when selecting and validating the item.

Refere to testscripts: TSTPL0025, TSTPL0052, TSTPL0053

1.2.9 Running MRP and MPS in the Job Queue (CORE modification)

The standard BC functionality via MRP and MPS does not deliver a batch function with different parameters for different planning persons. The User can only run the MRP and MPS with different parameters in a manual way.

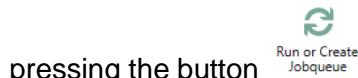
PM needs a possibility to calculate the demands for items via MRP and MPS in a batch job. Also it should be possible to add different parameters like filters for specific items, item groups, planning person, location codes and so on to run the MRP and MPS.

For this requirement a new setup table has been added. The setup table allows to define multiple calculation runs with different parameters for different planning persons. The setup table has a code that identifies the configuration (to allow multiple configurations) and all the option that are available as a user when running the calculate plan manually (staring / ending dates, MPS / MRP, etc.). Part of this setup is an option to specify what worksheet the suggestions should be created in. In column "item view" the sorting and specific filters on the item table will be set. This way the complete MRP run can be separated into different worksheets.

When entering "Calculate Plan Configuration" in the search box and clicking on the related link, the Calculate Plan Configurations opens.

- Code = Code (by choice)
- MPS = A plan is created by using the code. This is required for the project queue because the code is entered in the parameter field

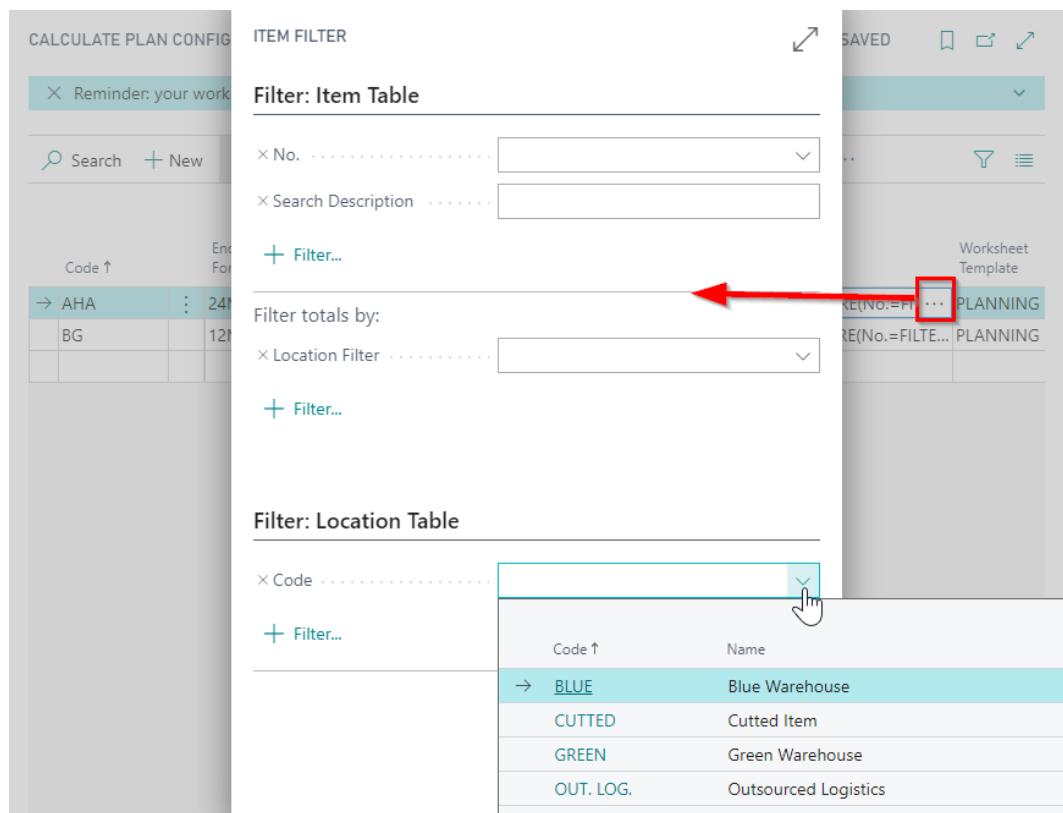
- MRP = Specifies whether to calculate a master production schedule (MPS) based on independent demand. The results will appear on the planning worksheet, and can be changed. It is then possible to calculate a materials requirement plan (MRP) to include the corresponding demand
Starting Date = Specifies the date to use for any new orders. This date is used to evaluate inventory. If inventory is below the reorder point, then the replenishment order is scheduled forward from this date.
(e.g. Starting from Today, 0D must be entered). Only supply and demand events with due dates on or after the starting date are considered by the planning run. Any events with due dates before the planning starting date are consolidated into one emergency supply order for the item to arrive on the planning starting date.
- Ending Date = Specifies the date where the planning period ends. Demand is not included beyond this date. (e.g. End 2 months from today, 2M must be entered)
 - Filter for Today = 0D,
 - Filter for 2 weeks from today = 2W
 - Filter for 6 Months from today = 6M
- Stop and Show First Error = Specifies whether to stop the planning run when it encounters an error. If the planning run stops, then a message is displayed with information about the first error. If an error exists, then only the successful planning lines that were made before the error was encountered are included in the planning worksheet. This does not work over the Job Queue, but it works when



pressing the button manually. If this field is not selected, then the Calculate Plan batch job continues, until it is completed. Errors will not interrupt the batch job. If one or more errors exist, then a message is displayed after completion saying how many items are affected. The Planning Error Log window then opens to provide more details about the error and links to the affected item card or cards.

- Use Forecast = Specifies a forecast that should be included as demand when running the planning batch job
- Exclude Forecast Before = Specifies, which part of the selected forecast should be included into the planning run. Entering a date excludes forecast demands before that date

- Respect Planning Parameters for Exception Warnings: By default, this field is not selected.
- Item View = Filter for Item and Location. By clicking on:  the item filter page opens.



ITEM FILTER

Filter: Item Table

- × No.
- × Search Description
- + Filter...
- Filter totals by:
- × Location Filter
- + Filter...

Filter: Location Table

- × Code
- + Filter...

Code ↑	Name
→ AHA	24H
BG	12H

Code ↑	Name
→ BLUE	Blue Warehouse
CUTTED	Cutted Item
GREEN	Green Warehouse
OUT. LOG.	Outsourced Logistics

- Worksheet Template = Select the Worksheet Template for Req. Worksheet or Planning Worksheet
- Delete Worksheet Lines = Clear existing Worksheet lines, meaning all existing lines will be removed only in this worksheet
- Worksheet Name = Select an Worksheet Name
- Schedule Time = Insert the time for starting the Job Queue.

By default, the button is pressed the first time for this record



then

Run or Create
Jobqueue

creates a job for each day with 00:00 start time. If a time is stored here, this is taken as new Start time in the job Queue

- Batch Status = Only information field about the status

1.3 Creation Date – CORE Modification

It should be possible to see a Creation Date on purchase documents.

Therefore a new field "Creation Date" will be provided in the following tables:

- Purchase Header (38)
- Purchase Line (39)
- Purchase Header Archive (5109)

Field Name	Type	Description
Creation Date	Date	Filled automatically by the system when purchase documents will be created. Will be filled with the corresponding system date (not workdate) and the time stamp. For purchase archive documents the creation Date will be copied from source documents to the archive without any changes.

When new purchase documents will be created, this new field will be filled automatically by the system with the corresponding System Date (not workdate) and time stamp.

A document can be generated via the function "new" as well as via the following functions examples:

Source Document	Function	Target Document
Purchase Quote	Make Order	Purchase Order

This function will also work for every way a document is created, such as:

- Call from blanket order
- Out of requisition worksheet
- From an archived version
- Based on return orders
- Copy from another doc
- Etc.

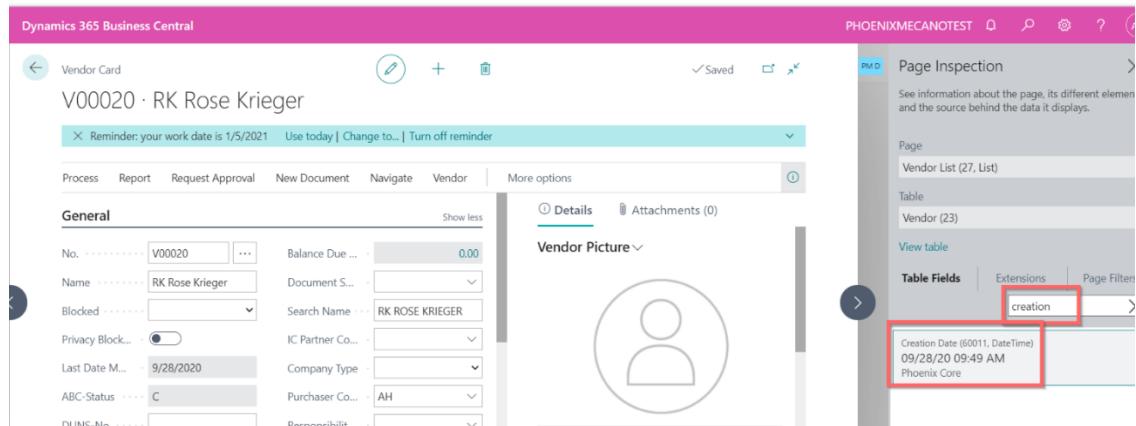
This new field "Creation Date" will also be filled in purchase archive documents. In the archive documents the field will be filled with the value from the corresponding source document (will be copied).

The new field "Creation Date" will not be visible on any page.

When a purchase document will be copied by using the function "copy", then the new documents or items need to get a new creation date according to the actual system date. That means that the field "Creation Date" will not be copied into the new documents or items.

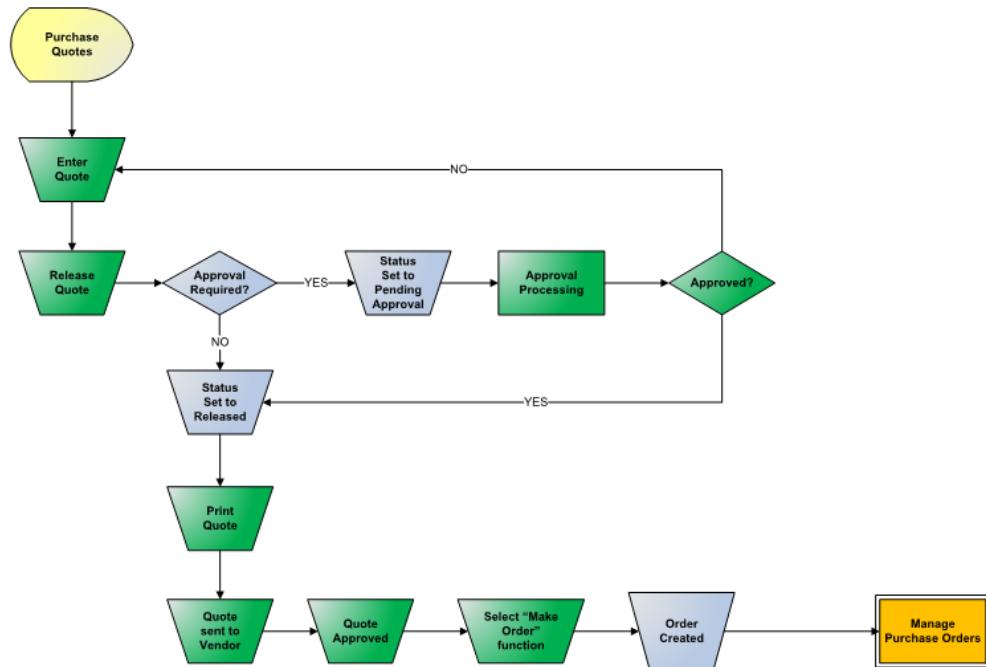
1.4 Creation Date on Vendor Card – CORE modification

It is necessary to have creation date on table / page vendor. This field is only for analyses and therefore not displayed on the vendor card. It can be checked via "STRG+CTRL+F1"



Note: This field is only filled for new created vendors.

1.5 Purchase Quotes



Purchase Quotes are rarely used by PM. If quotes are used they are created manually.

The quote is printed and sent to the vendor.

When the vendor sends his offer the prices can be inserted and if the offer is accepted the batch job Make Order can be used to create a purchase order.

In order to send the Purchase Quote also to other vendors, the batch job Copy Document is used.

PURCHASE QUOTE

1001 · Custom Metals Incorporated

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Request Approval Print/Send Quote Release Navigate More options

General

Vendor Name	Custom Metals Incorporated	...	Requested Receipt Date	...
Contact	Mr. Peter Houston	...	Vendor Shipment No.	...
Document Date	5/19/2020	...	Status	Open
Order Date	5/19/2020	...	Show more	

Lines

Type	No.	Vendor Item No.	Description	Description 2	Location Code	Cancellation Date	Quantity	Unit of Measure Code
→ Item	1110	266666	Rim		BLUE		2	PCS

Subtotal Excl. Tax (USD) 2.10 Total Excl. Tax (USD) 2.10
 Inv. Discount Amount (USD) 0.00 Total Tax (USD) 0.00
 Invoice Discount % 0 Total Incl. Tax (USD) 2.10

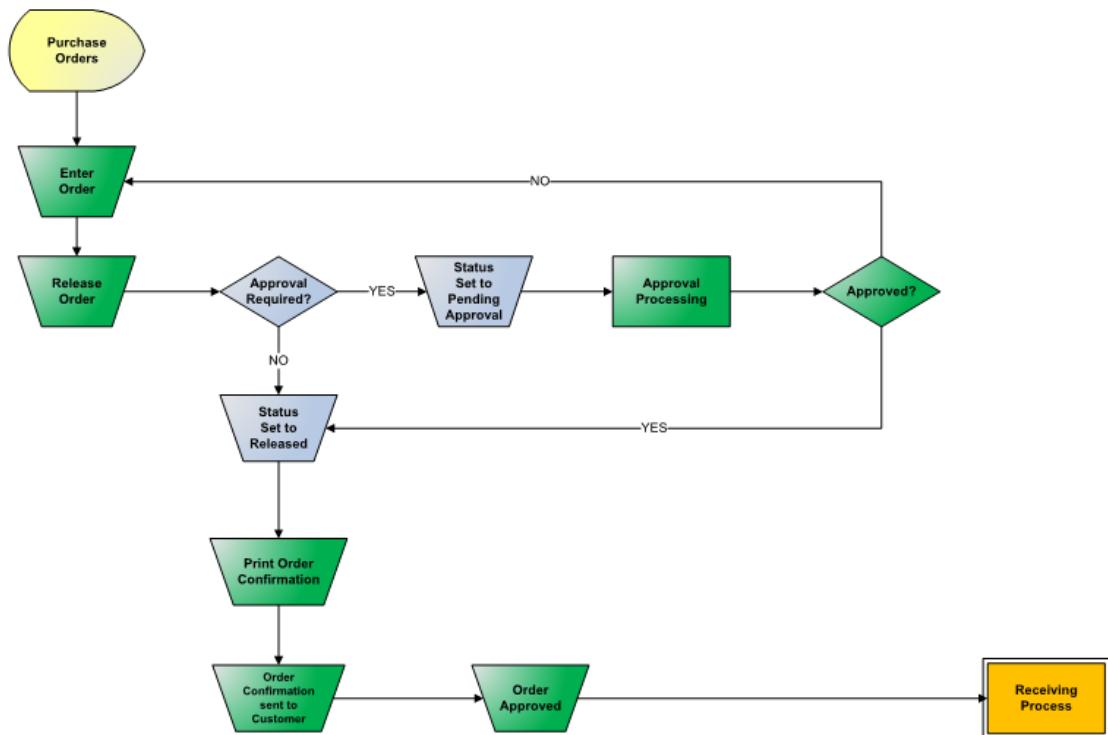
Invoice Details

1.6 Purchase Orders

1.6.1 Creating Purchase Orders

Purchase Orders can be created

- Manually
- Out of the Requisition Worksheet using the batch job Make Order
- Out of the Purchase Blanket Order using the batch job Make Order
- Using the Drop Shipment functionality (see below)
- Using the Special Orders (not discussed in the workshop)



1.6.2 Purchase Prices and Purchase Discounts

Cost information for each item can be found on the item card. When an item is selected on a purchase order line, the program automatically retrieves the last direct cost stored on the item card and copies it to the purchase order line.

When a vendor offers an item at a reduced cost or with a discount from the standard price that may depend on other criteria, such as the order date or a minimum order quantity, the one-cost-per-item-card model cannot accommodate these added requirements.

The purchases prices and line discounts offer a pricing functionality additionally to the standard item card. Discounts can also be applied at the invoice level based on the total invoice amount.

1.6.2.1 Purchase Price

Purchase prices are alternative prices for an item based on a combination of item number, vendor, and optionally, one or more of the following criteria:

- Item variant
- Unit of measure
- Minimum quantity purchased
- Order date
- Currency paid

When a purchasing agent creates a purchase order, BC will do the following:

- Checks, if alternative purchase prices are set up for the vendor
- Determines which alternative prices apply based on if their conditions are met by the purchase header and line details
- Selects the best price from among the applicable alternative prices
- To make sure opportunities obtain a better price are not missed, the purchasing interface also notifies purchasing agents that alternative prices exist, even if the conditions to apply them, can currently not be met.

PURCHASE PRICES											
X Reminder: your work date is 1/29/2021 Use today Change to... Turn off reminder											
GENERAL											
Vendor No. Filter	01254796	...	Starting Date Filter								
Item No. Filter		...									
Manage		Copy Prices		More options							
Vendor No. ↑	Vendor Name	Item No. ↑	Item Name	Unit of Measure Code ↑	Currency Code ↑	Minimum Quantity ↑	Direct Unit Cost	Starting Date ↑	Ending Date		
01254796	Progressive Home Furnishings	1000	Bicycle	PCS		20	23.00	8/26/2020			
01254796	Progressive Home Furnishings	1001	Touring Bicycle	PCS		1	25.00	8/26/2020			
01254796	Progressive Home Furnishings	70062	cutted item	PCS		5	2.00	8/26/2020			
01254796	Progressive Home Furnishings	1850	Saddle	PCS		10	589.00	8/26/2020			

1.6.2.2 Invoice and Line Discounts

There are several ways to reflect the agreed upon discounts that will apply when goods are purchased from different vendors. The commonly used discount type is an invoice discount. This is a percentage discount that is granted when the total invoice amount exceeds a certain minimum.

A purchase line discount is a more complex discount. The line discount calculates percentage for each purchase line, if the line meets certain conditions.

Option	Description
No Discounts	The program will not post discounts but instead will subtract them from the invoice amount before posting.
Invoice Discounts	The program will post invoice discounts when the invoice is posted. However, the program will not post line discounts.
Line Discounts	The program will post line discounts when the invoice is posted. However, the program will not post invoice discounts.
All Discounts	The program will post both invoice and line discounts when the invoice is posted.

Currency Code ↑	Minimum Amount ↑	Discount %	Service Charge
→	20.00	2	0.00

On the Item List or Item Card you can open the page for the Purchase Prices and Line Discounts.

Purchase Order
106033 · Service Electronics Ltd.

X Reminder: your work date is 1/2/2021 Use today | Change to... | Turn off reminder

Process Release Posting Order Request Approval Print/Send Navigate More options

* General > Service Electronics Ltd.

Lines Manage More options

Type	No.	Drop Ship...	Item Reference No.	Description	Description 2	Locati...	Quantity	Cancellation Date	Line Discount %
→ Item	LS-150			Loudspeaker, Cherry, 150W		SILVER *			1 0
Item	LS-150			Loudspeaker, Cherry, 150W		WHITE	32		2 0
Item	LS-150			Loudspeaker, Cherry, 150W		BLUE	115		

ITEM CARD
1200 · Back Wheel

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Item History Special Sales...es & Discounts Request Approval Actions **Navigate** Report Fewer options

History Item Availability Purchases Special Purcha...s & Discounts Sales Bill of Materials W...

Special Purcha...s & Discounts

Set Special Prices
Set Special Discounts
Special Prices & Discounts Overview

Inventory
Shelf No. F9

Blanket Sales Order

1.6.3 Ordered Quantity in Blanket Purchase Order

The information about which part of the blanket order is in an order but not yet posted can be seen under Lines / Unposted Lines / Orders.

Lines Manage Functions **Line** Fewer options

Item Availability by Unposted Lines Posted Lines Dimensions

Unposted Lines

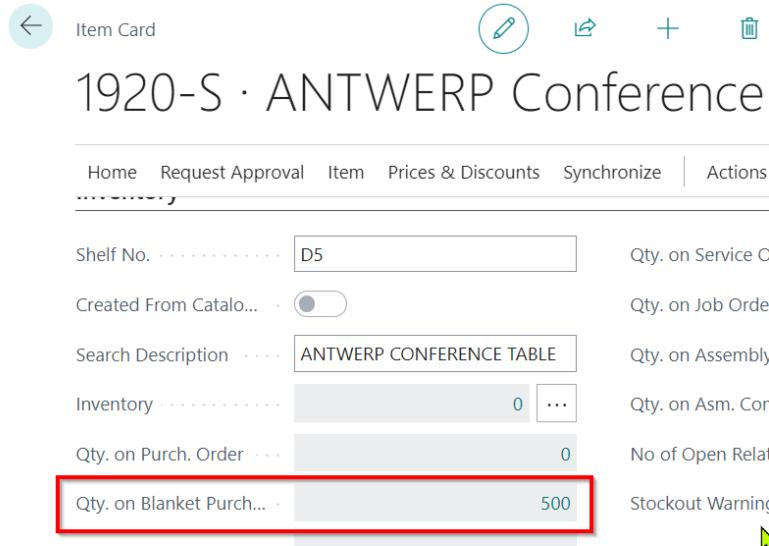
- Orders
- Invoices
- Return Orders
- Credit Memos

Rim

There is no need for customization, standard BC will be used.

1.6.4 Modification for field “Qty in Blanket Purchase Order at Item Card” Core Modification

In case a new Blanket Purchase Order is created the Qty at item card would be visible in field “Qty in Blanket Purchase Order”



In case a Blanket Purchase Order is created and a call of is also done Business Central calculate the correct Qty at item card.

The screenshot shows the 'Item Card' page for item '1920-S · ANTWERP Confer'. At the top, there are navigation icons: a back arrow, a pencil for edit, a magnifying glass for search, and a refresh symbol. Below the title, there are tabs: Home, Request Approval, Item, Prices & Discounts, and Synchronize. A breadcrumb trail shows 'Item >'. The main section is titled 'Inventory' and contains the following fields:

Shelf No.	D5	Qty
Created From Catalog...	<input checked="" type="checkbox"/>	Qty
Search Description	ANTWERP CONFERENCE TABLE	Qty
Inventory	0	Qty
Qty. on Purch. Order ...	100	No
Qty. on Blanket Purch... .	400	Sto

The last two rows ('Qty. on Purch. Order' and 'Qty. on Blanket Purch...') are highlighted with a red box.

1.6.5 *Blanket Purchase Orders from the Requisition Worksheet* (CORE modification)

Often in the requisition worksheet the planning person has to decide whether they can create an order out of a blanket order or not. Therefore a field that indicates if there are blanket orders for the item is required.

There is a field "Blanket Order available" in the "Requisition Worksheet". The field value is "Yes", if there is a blanket order line with the same item with enough quantity, so that a purchase order can be generated out of the blanket order.

REQUISITION WORKSHEETS

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Name DEFAULT

Manage Process Report Drop Shipment Special Order Line Item Availability by Actions Navigate Report Fewer options

Type	No.	Action Message	Acc... Act... Mes...	Cutting Item	Description	Location Code	Blanket Order available	Original Quantity	Quantity	Unit of Measure Co
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim		<input checked="" type="checkbox"/>		100	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim		<input checked="" type="checkbox"/>		100	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim		<input type="checkbox"/>		200	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim		<input type="checkbox"/>		200	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim	BLUE	<input type="checkbox"/>		1,133	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim	BLUE	<input type="checkbox"/>		1,133	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim	BLUE	<input checked="" type="checkbox"/>		3	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim	BLUE	<input checked="" type="checkbox"/>		3	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim	BLUE	<input checked="" type="checkbox"/>		5	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim	BLUE	<input checked="" type="checkbox"/>		5	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim	BLUE	<input checked="" type="checkbox"/>		2	PCS
Item	1110	New	<input checked="" type="checkbox"/>	<input type="text"/>	Rim	BLUE	<input checked="" type="checkbox"/>		2	PCS

In order to create the purchase order out of a blanket order, the requisition line is deleted, the "Qty. to Receive" is filled with the quantity of the requisition line and the function "Make Order..." is used to create the purchase order.

Test case:

If not already existing, create a blanket order with one or more items.

Afterwards, go to the requisition worksheet. Create a line with one of the items from the blanket order. Then, click somewhere out of the line before selecting it again. The program should find the blanket order in the background and set the field "Blanket Order available" to "yes". Create a second line in the worksheet and select an item that is not in a blanket order. The field "Blanket Order available" should stay on "no".

Go back to the blanket order, create an order and post it. When you returning to the worksheet the field should display "no" in the line with the same item as in the blanket order.

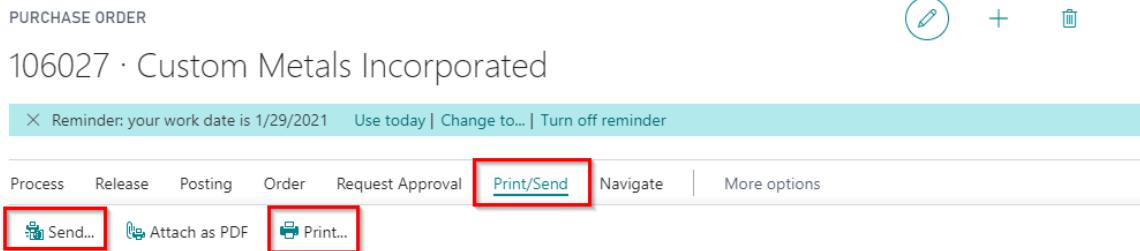
Refere to testscript: TSTPL0026

1.6.6 Importing a Vendor Price List

Phoenix Mecano decided to use the "Configuration Package" (Rapid Start) functionality to import vendor price lists. There is no need for a customization in the core.

1.6.7 Sending the Purchase Order to the supplier

After the order is approved (see the next chapter), the order is manually printed as PDF and manually sent via email. Use the Print button in the Purchase Order List or Purchase Order Card.



1.6.8 Confirmation from the supplier (CORE modification)

There will be a common solution to support both, Sales and Purchasing Approval.

For further information, see 1.3.3. in the Sales Key User Document.

For suppliers of Phoenix Mecano it is obligatory to send a confirmation. When the confirmation arrives in standard BC the purchase order must be re-opened, to insert the confirmed information. Afterwards the purchase order must be released again. If approvals are setup, the document must also be approved again. To avoid re-opening and restarting the approval process, BC will be customized so that the approval process won't start a second time, if not needed.

Type	No.	Customer Cross-Reference No.	Vendor Item No.	Description	Description 2	Informati...	Sales Order No.	Sales Order Line No.	Locati...	Bin Code	Reconfirm...	Confirmati...	Date
→ Item	70069			test script	TSTSAD033			0					t
Item	70069			test script	TSTSAD033			0					t

Test case:

Create an order and release it. Afterwards, change the "Promised Receipt Date". No error message should occur with the release status of the order. Do the same to the "Expected Receipt Date".

Try to change the "Direct Unit cost" in an item line. If you decrease the cost, no error message about the release status should occur. If you increase the cost, an error message should appear and the process should stop.

Try to change the Quantity in an item line. If you decrease the quantity, no error message about the release status should occur. If you increase the quantity, an error message should appear and the process should stop.

Refere to testscript: TSTPL0027

1.6.9 Dates for Confirmation and Reconfirmation (CORE modification)

The fields "Confirmation Date" and "Reconfirmation Date" have been added to the purchase order and blanket order pages and lists.

Both fields were developed for the confirmation performance of the vendor. If the vendor sent his confirmation, the date of the confirmation sent, should be entered in the field confirmation date. If the vendor sent a second or a next reconfirmation then this date should be entered in the field "Reconfirmation" date.

If a date is entered on the header the user will be asked if all lines shall be updated.

No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorization No.	Location Code	Assigned User ID	Confirmation Date	Reconfirmation Date
1001	: 01905777	OakvilleWorld		BLUE		9/6/2020	9/26/2020

BLANKET PURCHASE ORDER

1001 · OakvilleWorld

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Request Approval Print/Send Release Order More options

General

Show more

Vendor Name	OakvilleWorld	Vendor Order No.	
Contact	Mr. Sean P. Alexander	Purchaser Code	RL
No. of Archived Versions	1	Campaign No.	
Document Date	5/19/2020	Responsibility Center	
Due Date	5/31/2020	Assigned User ID	
Order Date	5/19/2020	Status	Open
Vendor Shipment No.		Confirmation Date	9/7/2020
Order Address Code		Reconfirmation Date	9/28/2020

Confirmation Date: 9/7/2020
Reconfirmation Date: 9/28/2020

Lines Manage Functions Line Fewer options

Type	Quantity Received	Quantity Invoiced	Department Code	Project Code	Customergr... Code	Area Code	Businessgroup Code	Salescampaign Code	Cancellation Date	Confirmatio... Date	Reconfirm... Date
→ Item										9/7/2020	9/28/2020

CRONUS US DEMO, Inc. | Finance ▾ Cash Management ▾ Sales ▾ Purchasing ▾ Setup & Extensions ▾ Intelligent Cloud Insights ▾

Vendors Item Charges Purchase Orders Purchase Invoices Purchase Return Orders Posted Purchase Credit Memos Posted Purchase...turn Shipments

Incoming Documents Purchase Quotes Blanket Purchase Orders Purchase Credit Memos Posted Purchase Invoices Posted Purchase Receipts

Purchase Orders: All ▾ | Search + New Delete Print/Send Order Release Posting Navigate Page More options

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

No. ↑	Vendor Order No.	Location Code	Assigned User ID	Document Date	Status	Your Reference	External Document No.	Sub... Confirma... Date	Reconfirm... Date	No. Printed	Amount
106027				5/19/2020	Open	TSTPL0018		8/2/2020	9/26/2020	1	0.00
106030		BLUE		5/19/2020	Open			9/6/2020	9/30/2020	1	84.96
106031		BLUE		5/19/2020	Released	TEST CUTTED ITEM AS DROP SHIPMENT				2	0.00
106033		BLUE		1/29/2021	Released					0	227.00
106034				5/19/2020	Open					0	15.75
P000002				5/19/2020	Open	TSTPL0021	TSTPL0021			0	5.00
PRNNNNNN				5/19/2020	Released	TSTPL0021	TSTPL0021			0	5.00

PURCHASE ORDER

106027 · Custom Metals Incorporated

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Release Posting Order Request Approval Print/Send Navigate More options

General

Vendor Name	Custom Metals Incorporated	Total Invoice Amount	
Vendor Name 2		Invoice Difference	
Contact	Mr. Peter Houston	Your Reference	
Document Date	5/19/2020	External Document No.	TSTPL0018
Vendor Invoice No.	TSTPL0018	Confirmation Date	8/2/2020
Vendor Shipment No.		Reconfirmation Date	9/26/2020
Status	Open	No. Printed	
Subcontract			

Confirmation Date: 8/2/2020
Reconfirmation Date: 9/26/2020
No. Printed: 0

Lines Manage Line Functions Order Page Fewer options

Type	No.	Customer Cross-Reference No.	Vendor Item No.	Description	Description 2	Information	Sales Order No.	Sales Order Line No.	Locati... Code	Bin Co	Reconfirm... Date	Confirmatio... Date	QC required	Cancell Date
→ Item	1850	T5555-FF	Saddle				0	0	BLUE		9/26/2020	8/2/2020	No	

Version: 20210423

Please note that changes to this document are possible at any time without notice.

Refere to testscript: TSTPL0136

1.6.10 Shipping instructions for the supplier (CORE modification)

PM needs fields to define how the supplier should ship the goods. The purchase header was extended with the following fields.

- Shipping Advice
- Shipping Agent code
- Shipping Agent Service Code
- Shipping Payment Type
- Shipping Account Number

Field Name	Type	Description
Shipping Advice	Option: Partial, Complete	
Shipping Agent Code	Code 10	TableRelation to Shipping Agent
Shipping Agent Service Code	Code 10	TableRelation to Shipping Agent Services with Shipping Agent code as above
Shipping Pay- ment Type	Option: Prepaid, Third Party, Freight Collect, Consignee	
Third Party Ship. Account	Code 20	Table Relation to Vendor

The fields "Shipping Advice", "Shipping Agent Code"

and "Shipping Agent Service Code" should be the same type as the corresponding fields in the BC sales order. They are added in Fasttab "Shipping and Payment". The fields are needed only to inform the supplier, no functionality is linked.

PURCHASE ORDER

PO00063 · London Postmaster

Reminder: your work date is 1/29/2021 | Use today | Change to... | Turn off reminder

Process Release Posting Order Request Approval Print/Send Navigate More

Shipping and Payment

Ship-to	Default (Company Address)
Name	CRONUS USA, Inc.
Name 2	
Address	7122 South Ashford Street
Address 2	Westminster
ZIP Code	31772
City	Atlanta
State	
Country/Region	US
Contact	
Shipping Advice	Partial
Shipping Agent Code	
Shipping Agent Service Code	
Shipping Payment Type	Prepaid
Third Part Ship. Account	

Test case

Create an order. Check if the new fields exist in the tab Shipping. Check if the "Shipping Advice" displays the correct options and the "Shipping Agent Code" and "Shipping Agent Service Code" have the correct table relations.

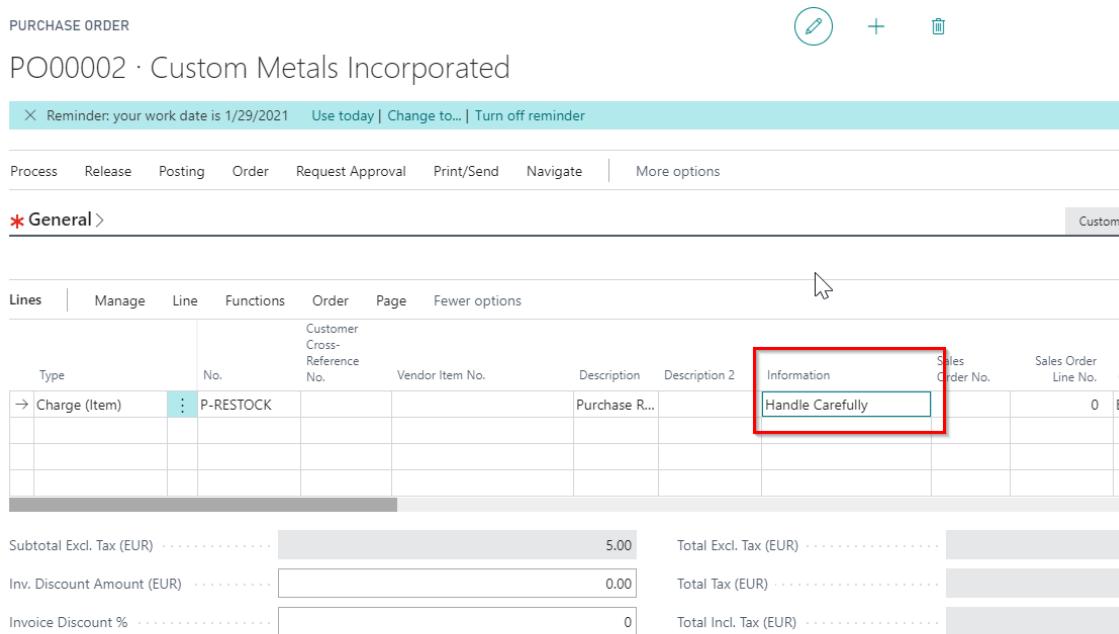
There will be a table behind the field Shipping Payment Type to define the options; Shipping Account Number is a manual entry text field

Refer to testscript: TSTPL0137

1.6.11 Information Field on Purchase Line (CORE modification)

Phoenix Mecano needs the field "Information" (Text 50) in the purchase line where internal information can be entered. The field is only implemented in the purchase line. There is no need to copy the content to warehouse – or posted documents.

The field is visible in the pages "Purchase Lines" and "Purchase Order Subform".

**Invoice Details >****Test case:**

Create a new order. Create a new line and check if the new field "Information" exists. Is it editable and allows the maximum length of 50 characters?

Refere to testscript: TSTPL0029

1.7 Approval Process

Phoenix Mecano works with an approval workflow process for purchase orders. The BC approval workflow process meets the requirements of Phoenix Mecano.

1.7.1 *Approval of the Purchase Order*

Approvals can be used for purchase orders. The sales and purchase document approval workflow enables users to submit a document, typically a sales order or purchase order. The approval workflow follows a predefined hierarchy of approval managers with specified approval amount limits.

1.7.2 *Templates*

The user can use templates to select which types of sales or purchase documents to include in the approval process. A standard set of templates, for both sales and purchase documents, has been provided for this purpose.

If a particular document requires two different reviewers, the user can set up additional approvers. For example, in a small company where the manager or the owner has to approve everything, the user can be set as an additional approver.

1.7.3 *Notification*

The notification system sends e-mail notifications between users and their approvers about documents that need approval. In addition, overdue notifications can be sent by the administrator to be sure all approvers remember to approve their documents.

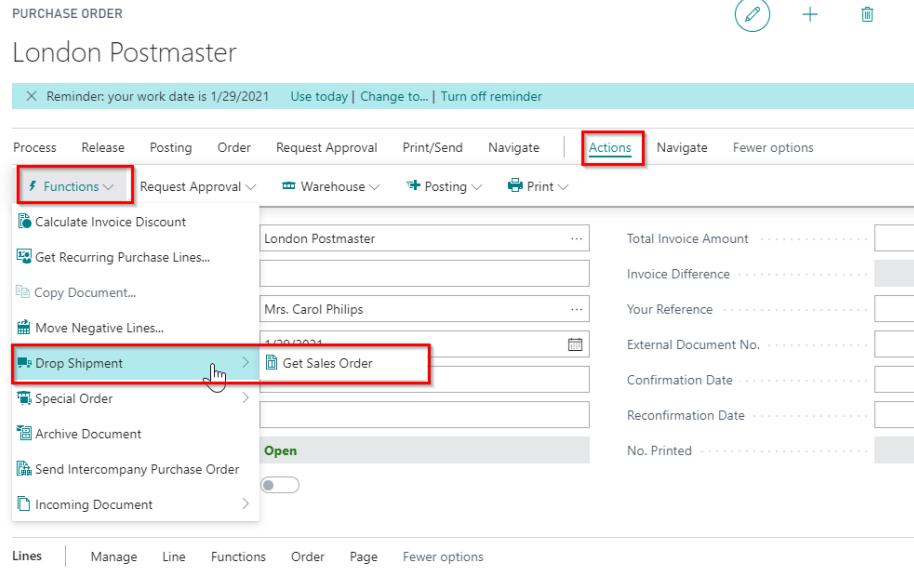
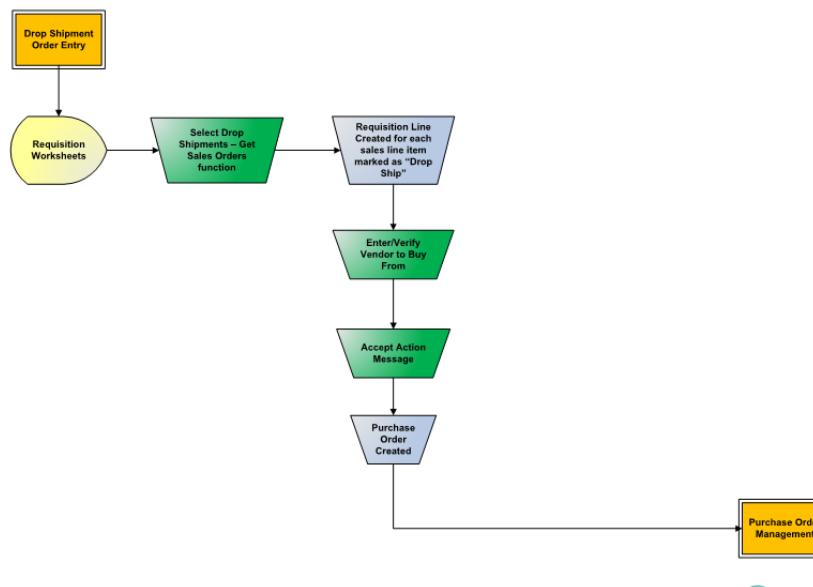
1.7.4 *Delegating Approval*

The users can assign a substitute approver for periods when a primary approver is out of office, so that a process does not get delayed. Since the administrator is responsible for maintaining the document approval system, it is his task to add substitute approvers and ensure that pending notifications are delegated to the substitutes.

With a few exceptions, the overall principles and workflow are the same for both sales and purchase documents.

1.8 Drop Shipment

PM uses also the Drop Shipment functionality to create a purchase order. The purchase order for the drop shipment can either be created via the requisition-worksheet-process, or directly in a new purchase order. Both processes use the function Drop Shipment / Get Sales Order.



After the purchase order is created, there is a one-to-one link to the sales order. The sales order cannot be changed anymore.

Test case:

It should be tested, if the only way for changes is that the purchaser removes the connection and connects the documents after changes are finished again.

Refere to testscript: TSTPL0140

1.9 Transfer content from SO to PO in case of drop shipment (CORE modification)

The content of some fields from the Sales Order should be transferred to the Purchase Order when using drop shipment. When creating a Drop Shipment, either from the Purchase Order or from the Req. Worksheet, the listed fields from the Sales Order must be copied to the Purchase Order.

Listed fields are also visible on the PO page and list.

Purchase order header:

- General tab
 - Field: "Your Reference" – Existing field will be used in the PO
 - Field: "External Document No." – Requires an additional field in PO
- Shipping tab
 - Field: "Shipping Advice" – Existing field will be used in the PO
 - Field: "Shipment Method Code" – Existing field will be used in the PO
 - Field: "Shipping Agent Code" – Existing field will be used in the PO
 - Field: "Shipping Agent Service Code" – Existing field will be used in the PO

Purchase order line:

Field on the PO line called "Customer Cross-Reference No." that is populated by the Field "Cross-Reference No." from the SO line is added. The field will be used only for information, no lookup or other functionality is needed.

The fields will be filled once, when the PO is automatically created. A permanent synchronization between SO and PO is not needed.

In BC it is also possible to paste multiple Sales Orders in one Purchase Order for drop shipment. However the field "Ship-to Code" is checked, that means that it is checked that the goods are delivered to the same place. This error has to be extended, so that the above fields from the sales order header are also checked to be equal in all Sales Orders.

PURCHASE ORDER

PO00082 · Progressive Home Furnishings

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process	Release	Posting	Order	Request Approval	Print/Send	Navigate	Actions	Navigate	Fewer options																																
General <div style="float: right;">Show more</div> <table border="1"> <tr> <td>Vendor Name</td><td>Progressive Home Furnishings</td><td>Total Invoice Amount</td><td>0.00</td></tr> <tr> <td>Vendor Name 2</td><td></td><td>Invoice Difference</td><td>0</td></tr> <tr> <td>Contact</td><td>Mr. Michael Sean Ray</td><td>Your Reference</td><td>this is sales your reference</td></tr> <tr> <td>Document Date</td><td>1/29/2021</td><td>External Document No.</td><td>THIS IS SALES EXTERNAL DOCUMENT NO</td></tr> <tr> <td>Vendor Invoice No.</td><td>*</td><td>Confirmation Date</td><td></td></tr> <tr> <td>Vendor Shipment No.</td><td></td><td>Reconfirmation Date</td><td></td></tr> <tr> <td>Status</td><td>Open</td><td>No. Printed</td><td>0</td></tr> <tr> <td>Subcontract</td><td></td><td></td><td></td></tr> </table>										Vendor Name	Progressive Home Furnishings	Total Invoice Amount	0.00	Vendor Name 2		Invoice Difference	0	Contact	Mr. Michael Sean Ray	Your Reference	this is sales your reference	Document Date	1/29/2021	External Document No.	THIS IS SALES EXTERNAL DOCUMENT NO	Vendor Invoice No.	*	Confirmation Date		Vendor Shipment No.		Reconfirmation Date		Status	Open	No. Printed	0	Subcontract			
Vendor Name	Progressive Home Furnishings	Total Invoice Amount	0.00																																						
Vendor Name 2		Invoice Difference	0																																						
Contact	Mr. Michael Sean Ray	Your Reference	this is sales your reference																																						
Document Date	1/29/2021	External Document No.	THIS IS SALES EXTERNAL DOCUMENT NO																																						
Vendor Invoice No.	*	Confirmation Date																																							
Vendor Shipment No.		Reconfirmation Date																																							
Status	Open	No. Printed	0																																						
Subcontract																																									
Lines Manage Line Functions Order Page Fewer options																																									
Type	No.	Customer Cross-Reference No.	Vendor Item No.	Description	Description 2	Cross-Reference No.	Information	Sales Order No.	Sales Order Line No.																																
→ Item	: 1850	CROSSADDLE	T5555-FFy	Saddle	saddle desc 2			1074	10000																																

PURCHASE ORDER

PO00082 · Progressive Home Furnishings

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process	Release	Posting	Order	Request Approval	Print/Send	Navigate	Ac
Customer: C00010 Ship-to Code: ANHA GmbH Name: ANHA GmbH Name 2: Address: An der Kleinen Mulde 64 Address 2: App 36 ZIP Code: 32549 City: Bad Oeynhausen Country/Region: DE Contact: Andre Haft							
Shipping Advice: Partial Shipping Agent Code: FEDEX Shipping Agent Service Code: NEXT DAY Shipping Payment Type: Prepaid Third Part Ship. Account:							

The field "Your Reference" and "External Document No." have been added to the Purchase Order List.

This screenshot shows the Purchase Order List page in Business Central. A red box highlights the 'Purchase Orders' tab in the ribbon. Another red box highlights the 'More options' dropdown menu at the top right. The main grid displays purchase orders with columns for Vendor, Order Date, Status, and two new columns: 'Your Reference' and 'External Document No.'. The 'Your Reference' column contains values like TSTPL0018, TEST CUTTED ITEM AS DROP SHIPMENT, TSTPL0021, and TSTPL0021. The 'External Document No.' column contains values like TSTPL0018, TEST CUTTED ITEM AS DROP SHIPMENT, TSTPL0021, and TSTPL0021. The status column shows various states such as Open, Released, and Pending.

It is now possible for a sales order with drop shipment to call up the designated purchase order in editable mode. The same functionality is also available on the purchase order to call up the designated sales order in edit mode. Functionality can be called via the "Order" functionality on the lines.

This screenshot shows a Sales Order for 'PO00082 · Progressive Home Furnishings'. A red box highlights the 'Lines' tab in the ribbon. Another red box highlights the 'Order' button in the ribbon. The main grid shows a single line item for a 'Drop Shipment'. A hand cursor is hovering over the 'Order' button. Below the grid, there are buttons for Process, Release, Posting, Order, Request Approval, Print/Send, and Navigate, followed by Actions, Navigate, and Fewer options. At the bottom, there are fields for Subtotal Excl. Tax (USD) and Total Excl. Tax (USD).

Purch.-Get Drop Shpt. Codeunit

Added functionality to copy the named fields from Sales Order to Purchase Order.

Req. Wksh.-Make Order Codeunit

Added functionality to copy the named fields from Sales Order to Purchase Order.

Test case:

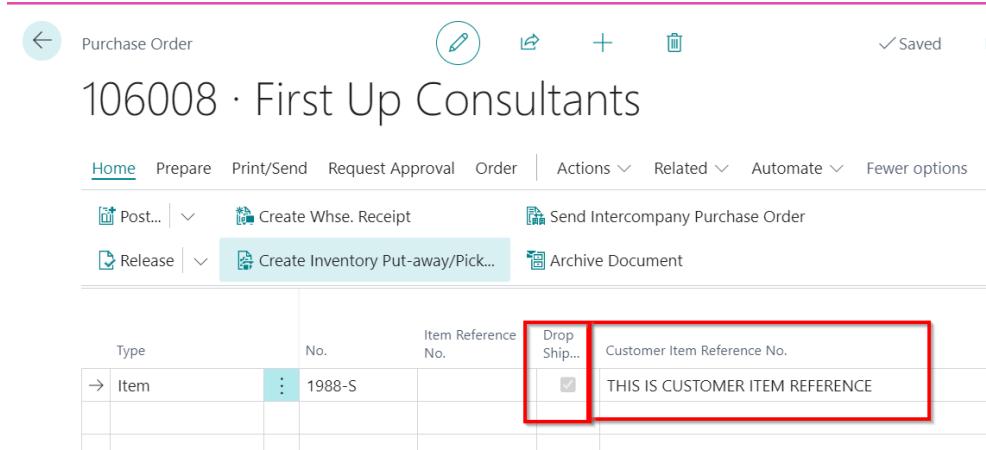
Create a Sales Order and mark it as drop shipment. Make sure that all fields you want to populate to the Purchase Order are entered. Create a Purchase Order and select the right Sales Order for drop shipment. Check that all fields are transferred. Next create the Purchase Order via the Requisition System. Also via the Requisition System the fields should be transferred.

Refere to testscripts: TSTPL0012, TSTPL0050

1.9.1 Change Caption of field 65006 at Purchase Line (Core Modification)

At Purchase Lines exist Core field “Customer Reference No”. This fields displays the “Customer item reference no.” in case this purchase order line is linked to a sales order line for drop shipment or special order.

The caption “Customer reference no.” causes trouble for naming issues. It should be renamed into “Customer Item Reference No.” for better understanding.

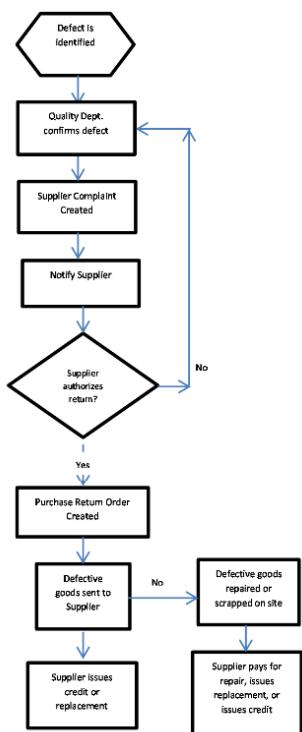


1.10 Purchase Return Management

1.10.1 Master Process for Purchase Returns

When a defective good is detected a complaint is created in BC (see next paragraph). Then the supplier is notified, and it has to be decided how to proceed. If it is decided that the good is scraped PM will send a debit note to the supplier (in BC a debit note is a purchase credit memo). If PM and the supplier decide that the good is sent back a purchase return order is created and the item is sent back together with the debit note.

If PM needs a replacement a purchase order is created for the receipt of the new good.



1.10.2 Returns Management Setup

The setup of returns management consists of two elements:

- **General setup:** Several fields on the **Sales & Receivables Setup** and **Purchases & Payables Setup** pages define the setup of Sales Return Order Management and Purchase Return Order Management.
- **Return Reasons setup:** A company can set up codes that specify the reasons to return items. These apply to both, customer and vendor returns. A return reason code can be selected, when a return agreement in most sales and / or purchase documents is registered.

RETURN REASONS

✓ SAVED ✖️ ↗️ ↘️ ↕️

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Search New Edit List Delete Page Y ≡

Code ↑	Description	Default Location Code	Inventory Value Zero
→ DAMAGED	Damaged in Shipment	<input type="checkbox"/>	
DEFECTIVE	Defective Item	<input type="checkbox"/>	
NONEED	No Current Need	<input type="checkbox"/>	
P-REPAIR	Repair Purchased Item	<input type="checkbox"/>	
S-REPAIR	Repair Sold Item	<input checked="" type="checkbox"/>	
WRONG	Wrong Item	<input type="checkbox"/>	

In addition to setting up return reason codes and descriptions, a default location can be assigned to a return reason. Items that are returned are then received and / or shipped from the assigned location.

1.10.3 Manage Returns to Vendors

Managing returns to vendors involve a series of tasks. Vendor-oriented tasks include the following:

- Register compensation agreement with the vendor
- Ship return items to the vendor, if applicable
- Debit the vendor, either by receiving a credit for physically returned items, or with a purchase allowance if the company is not required to physically return the items
- Create a replacement purchase order(s) if a replacement is specified by the compensation agreement

Additionally, the following internal tasks might have to be completed:

- Receive replaced / repaired items
- Make sure that the inventory value assigned to the returned items is accurate
- Combine several return shipments to the same vendor into one credit memo document

In BC, a purchase return order can be used to register a compensation agreement with a vendor. From this document, other purchase-related documents can be accessed to enter and maintain the return-related information, the method of compensation. These include the following:

Item: This is used for transactions where an item is physically returned to the vendor.

Charge (Item) or G / L Account: These are used for financial transactions where the company receives a credit (in the form of a purchase allowance) for an item without physically returning it to the vendor. The same line types are used for registering fees associated with a return. The Charge (Item) line type supports the correct tracking of item values, and is used any time that a charge is directly related to the item (such as a manufacturing flaw). The G / L Account is used when the charge is not directly related to the item, such as when a shipping carrier damages an item that is manufactured without defect.

The screenshot shows the 'Purchase Credit Memo' screen in Business Central. At the top, there's a header bar with a pencil icon, a plus sign, and a trash bin icon. Below the header, the vendor name '1004 · Custom Metals Incorporated' is displayed. A reminder message at the top says 'Reminder: your work date is 1/29/2021' with options to 'Use today' or 'Change to...'. Below the reminder, there are standard navigation buttons: Process, Request Approval, Credit Memo, Release, Posting, Navigate, Actions, Navigate, and Fewer options. The main area is titled 'General' and contains fields for Vendor Name (Custom Metals Incorporated), Contact (Mr. Peter Houston), Due Date (1/29/2021), Expected Receipt Date, Vendor Authorization No., Vendor Cr. Memo No. (marked with a red asterisk), and Status (Open). Below the general section is a table titled 'Lines' with columns for Type, No., Vendor Item No., Description, Description 2, Location Code, Quantity, Unit of Measure Code, Direct Unit Cost, and Excl. Tax. The table lists two items: a comment and an item (70000 xyz) with a quantity of 20 and a unit cost of 24.216. There are also rows for comments and items with due dates of 1/29/2021 and 1/29/2021 respectively.

Type	No.	Vendor Item No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost	Excl. Tax
Comment			Return Shipment No. 105007:						
Item	70000	xyz	Side Panel		BLUE	20	PCS	24.216	
Comment			Return Shipment No. 105008:						
Item	70000	xyz	Side Panel		BLUE	10	PCS	24.216	

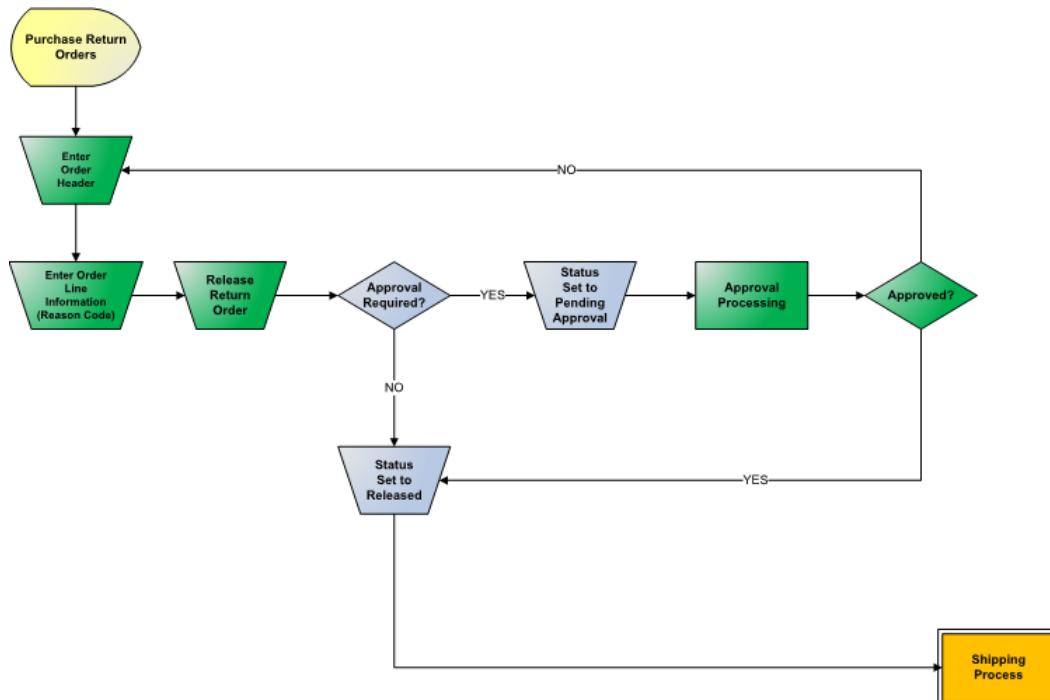
1.10.4 Complaint Management

Complaint Management is described in Key User Documentation for Complaint Mgmt. Complaints are the starting point when goods are defect and cover both, the purchase and sales complaint process.

The Complaint consists of header information, such as who created the complaint, for which customer / vendor, how high is the priority, what is the corrective action and so on. The line information show the related comments.

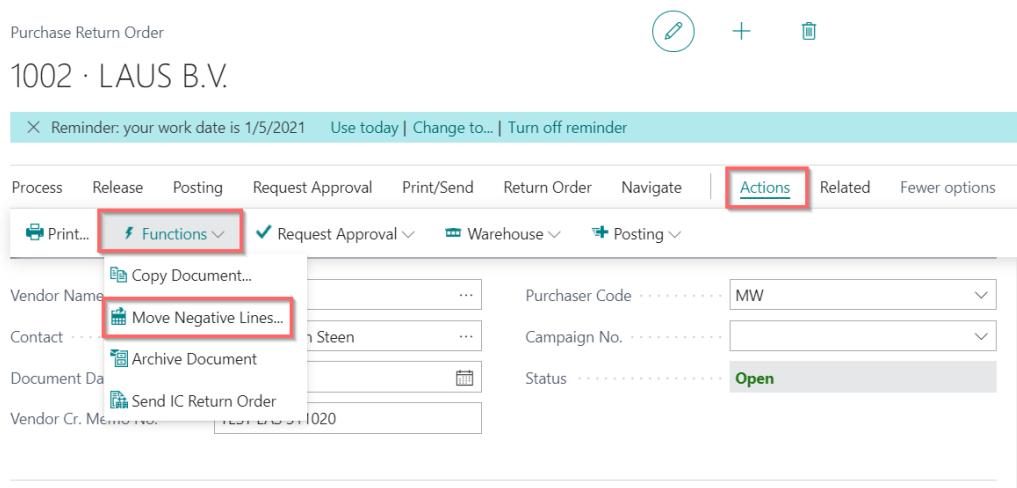
The complaint is linked to all associated documents like return purchase orders, replacement purchase order and so on (the same for sales). There are functions to create such documents out of the complaint. The subsequent return management is done in BC standard as described below.

1.11 Return Management



For the return management the purchase credit memos or the purchase return orders are used. PM will create these documents out of the new complaint module. Nevertheless, it is also possible to create the return documents manually.

If the vendor agrees to ship a compensation for the damaged good, this is done by inserting a negative line in the return document and using the function "Move negative Lines ..." This will create a new purchase order that will be sent to the customer for the compensation.



1.12 Item Status Management (CORE modification)

PM implemented with NAV2013 and NAV2016 the Item Status Management. This modification is completely taken over into BC. For the set up some additional steps have to be done.

1.12.1 Basic Setup

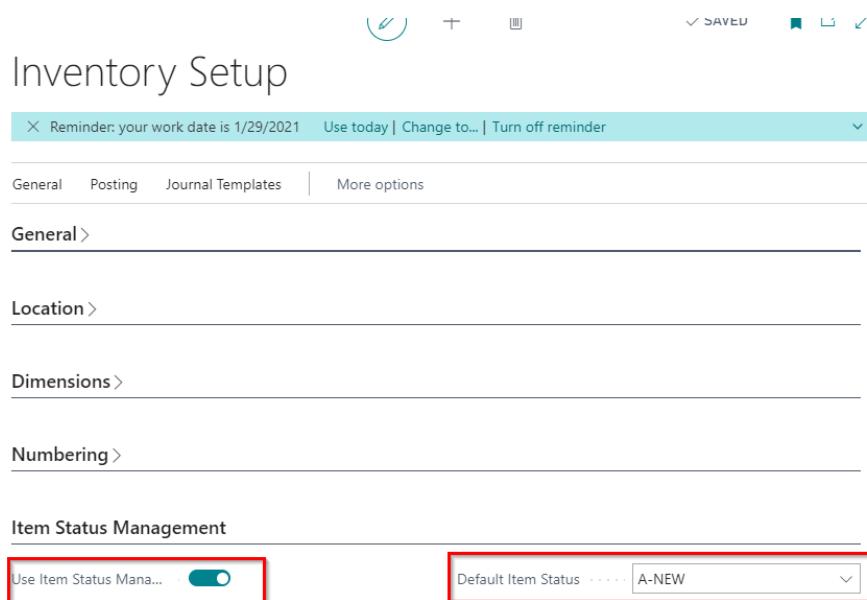
The functionality of the Item Status Management will be activated or deactivated in a general setup. To activate the Status Management Functionality a tab will be provided in the Inventory Setup. The tab is called "Item Status Management".

In this tab there are two new fields:

- Use Item Status Management (Boolean)
- Default Item Status (Table Relation to Table "Item Status")

Two fields in the new tab "Item Status Management" in "Inventory Setup":

Field Name	Type	Description
Use Item Status Management	Boolean	Filled manually To activate or deactivate Item Status Management
Default Item Status	Code (10)	Filled manually Table Relation to table "Status Management"



Use Item Status Management:

To activate the Item Status Management the boolean field "Use Item Status Management" needs to be activated.

Default Item Status:

The status an item will get – as default value – when a new item is generated. This default value can be selected in the field "Default Item Status".

Note: The Item Status Management needs to be activated.

Inventory Setup

The screenshot shows the 'General' tab selected in the 'Item Status Management' section. A red box highlights the list of item statuses, which includes:

Status ↑	Description
5-BLOCKED	Blocked
6-DEAD	Item Dead
→ A-NEW	New
B-PHASEIN	Phase In
C-RELEASED	Released
+ New	

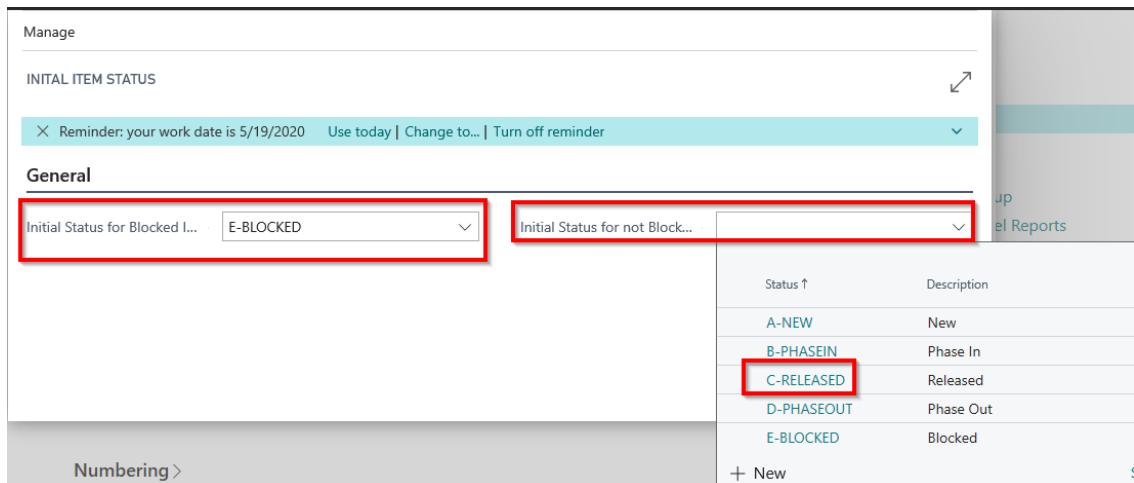
A field "Status" will be provided in the item card. Please see "Item Status Setup".

As soon as the field "Item Status Management" is activated in the setup a new page "Initial Setup" will appear in order to define initial setups for the field "status" in the item card for existing items:

- Initial Status for Blocked Items (Table Relation to table "Status Management")
- Initial Status for not Blocked Items (Table Relation to table "Status Management")

Two fields in the new page "Initial Setup":

Field Name	Type	Description
Initial Status for Blocked Items	Code (10)	Filled manually Table Relation to table "Status Management"
Initial Status for not Blocked Items	Code (10)	Filled manually Table Relation to table "Status Management"



Default Status for Blocked Items:

An existing item in BC will get this "status" on the item card when the item is blocked and without having a status – field "blocked" in the item card is set with true and the field "status" has no value in the item card.

Default Status for not Blocked Items:

An existing item in BC will get this "status" on the item card when the item is NOT blocked and without having a status – field "blocked" in the item card is set with false and the field "status" has no value in the item card.

The field "blocked" in the item card will switch to "not editable" when the field "Item Status Management" is activated in the setup. Then the user can not set the field manually anymore.

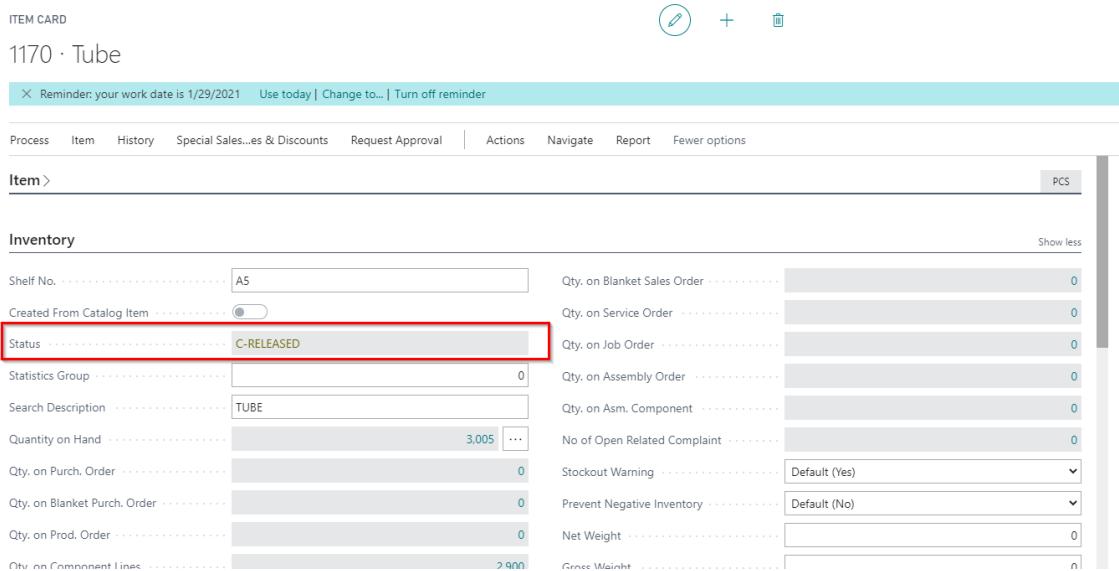
The field "Use Item Status Management" can only be deactivated as long as there are no entries in the field "Status" in table "Item".

In order to accomplish the requirements new functions will be provided as described below.

1.12.2 Item Status Setup

In BC it is possible to set an item as blocked or unblocked. With BC it is also possible to block or unblock items for sales or purchase separate from "all". But PM needs more options in order to indicate the current status of an item.

Therefore a field "Status" is provided in the item card. The field is provided in fast tab "Inventory" below field "Created from Catalog Item".

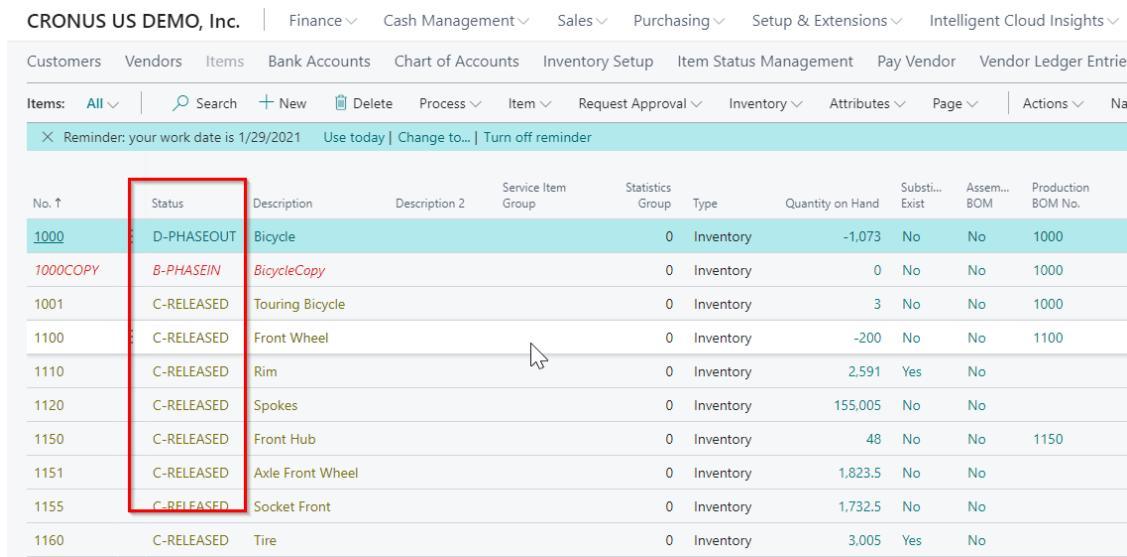


In the "Status Management" page the user can define the different status.

Field "Status" in the Page "Item Card":

Field Name	Type	Description
Status	Code (10)	Filled manually Table Relation to table "Status Management"

The field "Status" is available in the item list next to the Column "No. ".



No. ↑	Status	Description	Description 2	Service Item Group	Statistics Group	Type	Quantity on Hand	Substi... Exist	Assem... BOM	Production BOM No.
1000	D-PHASEOUT	Bicycle			0	Inventory	-1,073	No	No	1000
1000COPY	B-PHASEIN	BicycleCopy			0	Inventory	0	No	No	1000
1001	C-RELEASED	Touring Bicycle			0	Inventory	3	No	No	1000
1100	C-RELEASED	Front Wheel			0	Inventory	-200	No	No	1100
1110	C-RELEASED	Rim			0	Inventory	2,591	Yes	No	
1120	C-RELEASED	Spokes			0	Inventory	155,005	No	No	
1150	C-RELEASED	Front Hub			0	Inventory	48	No	No	1150
1151	C-RELEASED	Axle Front Wheel			0	Inventory	1,823.5	No	No	
1155	C-RELEASED	Socket Front			0	Inventory	1,732.5	No	No	
1160	C-RELEASED	Tire			0	Inventory	3,005	Yes	No	

The table and page "Status Management" have the following fields:

Field Name	Type	Description
Table ID	Integer	Holds the ID of the related table
Code	Code (10)	Filled manually This code is shown on the item card
Description	Text (50)	Filled manually Here you can enter a more detailed description of the status
Text Color / Style	Option	Options for different colors available in BC
Next Status Filter	Code (80)	Item Status Filter – In this field a filter can be entered to determine the workflow from one item status to the next one. When no filter is filled, all status are allowed to be next
Previous Status Filter	Code (80)	Item Status Filter – In this field a filter can be entered to determine the workflow from one item status to the previous one. When no filter is filled, all status are allowed to be previous
Production	Boolean	A checkmark indicates that an item with this status can be used on production orders and BOM Lines

Purchase	Boolean	A checkmark indicates that an item with this status can be used on purchase documents like quotes, orders etc.
Sales	Boolean	A checkmark indicates that an item with this status can be used on sales documents like quotes, orders etc.
Create SKU	Boolean	A checkmark means that it is allowed to create stock keeping units for an item with this status
Check Usage in Production BOMs	Boolean	A checkmark means that the system checks, if the item is used in an active BOM when the item gets this status.
Blocked	Boolean	A checkmark means that the standard BC field "blocked" is set to TRUE when an item gets this status.
Check Mandatory Fields	Boolean	When this field is check marked, the system will check if all mandatory fields are set in the item
Check Mandatory Dimensions	Boolean	When this field is check marked, the system will check if all mandatory dimensions are set in the item

Addittional columns added in BC to new standard fields for Purchase and Sales blocked

Field Name	Type	Description
Sales Blocked	Boolean	It can be defined per each status, if Sales is blocked or not
Purchase Blocked	Boolean	It can be defined per each status, if Purchase is blocked

The screenshot shows the 'Item Status Management' screen. At the top, there are buttons for Search, New, Edit List, Delete, and More options. Below the header is a table with columns: Status 1, Description, Style, Next Status Filter, Previous Status Filter, Production, Purchase, Sales, Create SKU, Check Usage in Production BOMs, Blocked, Check Mandatory Fields, Check Mandatory Dimensions, Sales Blocked, and Purch... Blocked. The table contains rows for various item statuses, each with specific settings for the checkboxes in the columns.

1.12.2.1 Status – color marking

It is possible to define a color for each status.

BC has only a certain pre-defined amount of colors and styles (e.g. Blue + Bold). BC also uses different names for each style (e.g. Blue + Bold is named StrongAccent).

In the table "Status Management" an option field is available with the different styles. See table below for the available options.

Style	BC Style Expression
Standard	Standard
Blue	StandardAccent
Bold	Strong
Blue + Bold	StrongAccent
Red + Italic	Attention
Blue + Italic	AttentionAccent
Bold + Green	Favorable
Bold + Italic + Red	Unfavorable
Yellow	Ambiguous
Grey	Subordinate

ITEM STATUS MANAGEMENT

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Status ↑	Description	Style	Next Status Filter	Previous Status Fi
1-NEW	New	Standard		
2-PURCPROD	Purchase Production Allo...	Standard		
→ 3-RELEASED	Released	Standard		
4-SALES	Sales only	Standard		
5-BLOCKED	Blocked	Standard		
6-DEAD	Item Dead	Standard		
A-NEW	New	Standard		
B-PHASEIN	Phase In	Standard		
C-RELEASED	Released	Standard		
D-PHASEOUT	Phase Out	Standard		
E-BLOCKED	Blocked	Standard		
F-DEAD	Dead	Standard		

If a color for a status is chosen then the following fields in the page "Status Management" are changed into the selected color for the corresponding line.

- Code
- Description

In the pages "Item Page" and "Item List" the following fields will appear in color – according to the defined color for the item status:

- No.
- Description
- Description 2
- Status

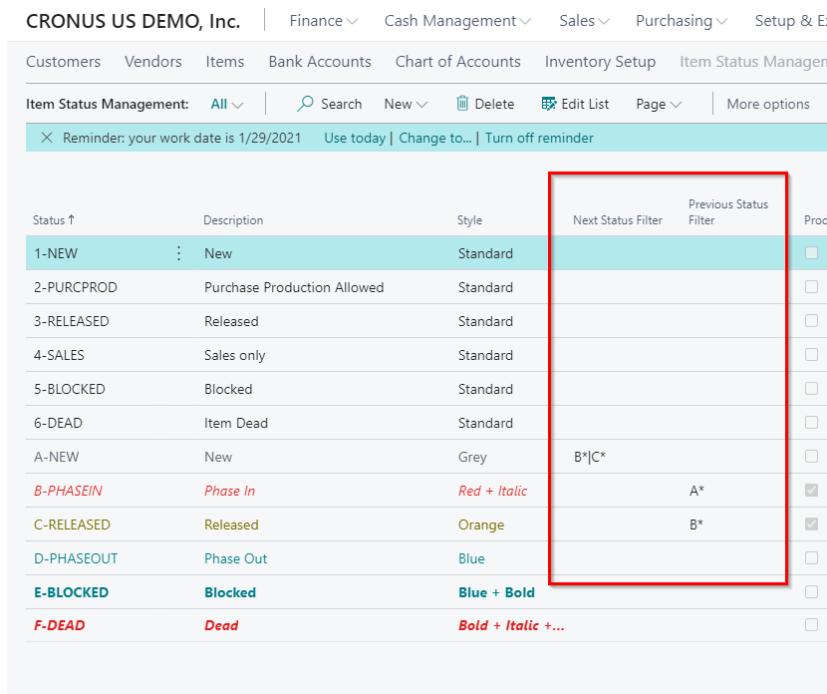
When using an item in sales and purchase lines the following fields will appear in color in the pages "Sales Line" and "Purchase Line"- according to the defined color for the item status:

- No.
- Description
- Description 2

In order to accomplish the requirements new functions are provided.

1.12.2.2 Status Change – Filter to determine the workflow when changing an item status

It is possible to define in which next status or previous status an item status can be changed. Therefore a setup is implemented where the user can define into which next or previous status an item status can be changed.



Status ↑	Description	Style	Next Status Filter	Previous Status Filter	Prod
1-NEW	New	Standard			<input type="checkbox"/>
2-PURCPROD	Purchase Production Allowed	Standard			<input type="checkbox"/>
3-RELEASED	Released	Standard			<input type="checkbox"/>
4-SALES	Sales only	Standard			<input type="checkbox"/>
5-BLOCKED	Blocked	Standard			<input type="checkbox"/>
6-DEAD	Item Dead	Standard			<input type="checkbox"/>
A-NEW	New	Grey	B* C*		<input type="checkbox"/>
<i>B-PHASEIN</i>	<i>Phase In</i>	<i>Red + Italic</i>		A*	<input checked="" type="checkbox"/>
C-RELEASED	Released	Orange		B*	<input checked="" type="checkbox"/>
D-PHASEOUT	Phase Out	Blue			<input type="checkbox"/>
E-BLOCKED	Blocked	Blue + Bold			<input type="checkbox"/>
F-DEAD	Dead	<i>Bold + Italic +...</i>			<input type="checkbox"/>

The setup of the filters can be done in table / page "Status Management" in the fields "Next Status Filter" and "Previous Status Filter".

The change into a defined status will be ensured by this two fields in which the user determines the respective dependencies per status. So for each status the user can define into which next or previous status an item status can be changed.

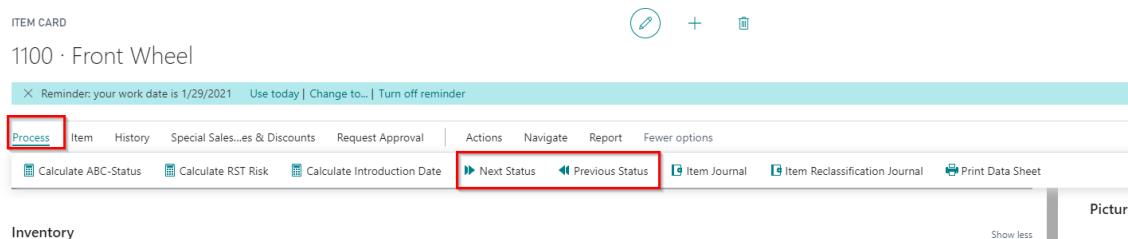
Example:

Next Status Filter	Previous Status Filter	P
2*		
3*		
4*	2*	
5*	3*	
6*	3* 4*	
B* C*		
C*	A*	
D*	B*	
E* F*	C*	
F*	C*	
..		

In order to change an item status there will be two functions on the Item Card:

- Next Status
- Previous Status

These two functions will be available as action buttons on the item card.



These two functions can also be opened through keyboard shortcuts.

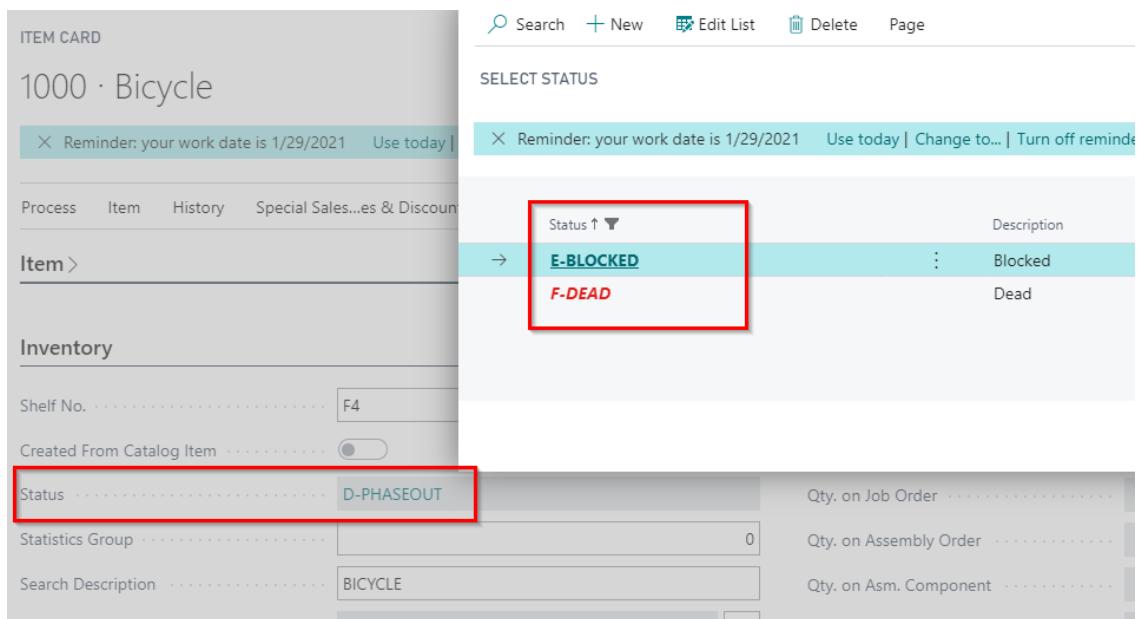
Next Status: Strg+CTRL+6
 Previous Status: Strg+CTRL+4

Next Status:

When using this function the system will check the current item status – value of the field "Item Status" on the Item Card. Then the system will look for the current Item Status Line in table "Status Management" and will check the defined status filters of the field "Next Status Filter".

The status will change to the next status immediately when there is only one status defined as next.

The status will NOT change immediately when there are multiple status defined as next to choose from. In this case the page "Select Item Status" will appear. In the page only those status are shown that correspond with the "Next Status Filter" of the current status. The User can decide to which status the item should change.



Previous Status:

When using this function the system will check the current item status – value of the field "Status Management" on the Item Card. Then the system will look for the current Item Status Line in table "Status Management" and will check the defined status filters of the field "Previous Status Filter".

The status will change to the previous status immediately when there is only one status defined as previous.

The status will NOT change immediately when there are multiple status defined as previous to choose from. In this case a page "Select Item Status" will appear. In the page only those status are shown that correspond with the "Previous Status Filter" of the current status. The User can decide to which status the item should change.

Status ↑	Description	Style	Next Status Filter	Previous Status Filter	Productivity
1-NEW	New	Standard	2*		<input type="checkbox"/>
2-PURCPROD	Purchase Production Allowed	Standard	3*		<input type="checkbox"/>
3-RELEASED	Released	Standard	4*	2*	<input type="checkbox"/>
4-SALES	Sales only	Standard	5*	3*	<input type="checkbox"/>
5-BLOCKED	Blocked	Standard	6*	3* 4*	<input type="checkbox"/>
6-DEAD	Item Dead	Standard			<input type="checkbox"/>
A-NEW	New	Grey	B* C*		<input type="checkbox"/>
B-PHASEIN	Phase In	Red + Italic	C*	A*	<input checked="" type="checkbox"/>
C-RELEASED	Released	Orange	D*	B*	<input checked="" type="checkbox"/>
D-PHASEOUT	Phase Out	Blue	E* F*	C*	<input type="checkbox"/>
E-BLOCKED	Blocked	Blue + Bold	F*	C*	<input type="checkbox"/>
F-DEAD	Dead	Bold + Italic +...			<input type="checkbox"/>

The new page, which is not editable, "Select Item Status" has the following fields:

Field Name	Type	Description
Item Status	Code (10)	Filled automatically – only those status are shown that correspond with the "Next or previous Status Filter" of the current status
Description	Text (50)	Description of the Status

In order to accomplish the requirements functions are provided.

1.12.2.3 Item Usage Restrictions

It should be possible to restrict the usage of an item in documents (Production, Purchase, Sales, Service) depending on the item status.

In standard BC Users can define if an item is blocked or not. However PM needs more options to control items.

For example:

An item can be released for production, but not for sales. Or an item can be released for sales, but not for purchase.

To ensure this, a setup for each status is provided where the user is able to define in which document an item can be used.

The setup of the Item Usage Restriction of each status is provided in the new table / page "Status Management".

Item Status Management									
Status ↑	Description	Style	Next Status Filter	Previous Status Filter	Production	Purchase	Sales	Create SKU	
→ 1-NEW	New	Standard			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2-PHASE IN	Phase In	Standard			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
A-NEW	New	Grey	B*C*		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
B-PHASEIN	Phase In	Red + Italic	C*	A*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
C-RELEASED	Released	Orange	D* E*	B*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
D-PHASEOU	Phase out	Blue	E* F*	C*	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
E-BLOCKED	Blocked	Blue + Bold	F* G*	D*C*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
F-DEAD	Dead	Bold + Italic + Red		E*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
G-TEST	TSTPL0031	Bold + Green		E*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

In this setup the user is able to decide about the following documents individually – by setting a checkmark:

- Production
- Purchase
- Sales
- Create SKU

A checkmark indicates that the usage of an item with this status is permitted for the particular documents.

Production:

A checkmark indicates that an item with this status can be used in production orders and BOM Lines.

Purchase:

A checkmark indicates that an item with this status can be used in purchase documents like quotes, orders etc.

Sales:

A checkmark indicates that an item with this status can be used in sales documents like quotes, orders etc.

Create SKUs:

A checkmark indicates that stock keeping units can be created for an item with this status.

If an user tries to generate SKUs for an item and the setup does not permit the creation of SKUs for items with this status then the system will create an error message. Example: "For Item XY it is not allowed to create SKUs."

Assumption: If an item changes into an status where the creation of SKUs is not allowed – however the item has already SKUs – the following will happen:

The item status will not change – error message

Example: "SKUs exist. Item Status cannot be changed"

In order to accomplish the requirements new functions are provided. A combination of several "checkmarks" is guaranteed.

1.12.2.4 Function – Copy Document

It should be possible to restrict the usage of an item in documents (Production, Purchase, Sales, Service) depending on the item status – see above. This restriction should be checked when using the function "Copy Document".

When using the function "Copy Document" the system is checking the status of the items which are used in the document lines. When an item in the document line is used where

the setup does not permit the usage of it with the status in this document type, then the system will create an error message.

Example: "Item XY is not released for Purchase".

In order to accomplish the requirements this functions are provided.

1.12.2.5 Process of already created documents and generation of text messages – when changing item status

When an item status is changed into a status where it is no longer permitted to use the item in defined documents, then the following will happen:

The usage of the item in new document lines will not be permitted by the system. A corresponding error message will appear.

However it will be possible to process documents which have been already created with this item.

When changing an item status the system will check in the setup which item usage restrictions are defined in the new status. Depending on what is no longer allowed in the next / previous status, the system will generate an appropriate option message to inform the user of existing document lines in the system. The system will check in the documents lines the field "remaining quantity".

The user will be asked if the item status should really be changed.

Example:

"Lines exist: Purchase. Do you really want to change the item status" yes – no.

In order to accomplish the requirements the functions are provided.

SALES ORDER

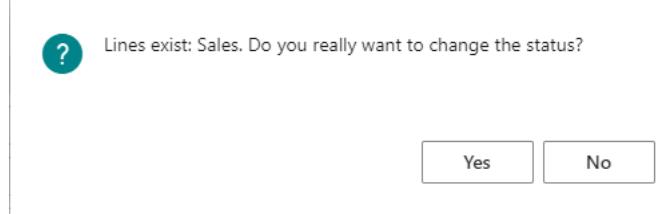
1075 · ANHA GmbH

[Process](#) [Report](#) [Release](#) [Posting](#) [Prepare](#) [Order](#) [Request Approval](#) [Print/Send](#) [Nav](#) The page has an error. Correct the error or try [revert the change](#).[General >](#)[Lines](#) [Manage](#) [More options](#)

Related to Line No.	Line No. ↑	Type	No.	Description	Description
0	10000	Item	70100	Test item introduction	
				Validation Results	
				Item 70100 is not released for Sales.	

However it is possible to process documents which have been already created with this item.

Posting a document which was created before the status was changed will be possible. When changing an item status, the system will check in the setup which item usage restrictions are defined in the status. Depending on what is no longer allowed in the next / previous status, the system will generate an appropriate option message to inform the user of existing document lines in the system.



1.12.2.6 Check of BOM Usage

It is possible to define which status should be checked, if the item is used in a Bill Of Material (BOM) before changing into the next / previous status.

Therefore a setup is provided where the user can define for each status whether the system should look if the item is used in an active BOMs or not.

The setup for checking if the item is used in a BOM of each status is provided in the table / page "Status Management ". The field to set the checkmark for each status line is called "Check Usage in Production BOMs".

When changing an item status the system will check if the "check usage in production BOM" is set in the new status. If the checkmark is set, then the system has to check if the item is used in an "active" BOM.

"Active" BOM means the following:

- field "Status" of a BOM has the value "certified" – Production BOM Header
- field "Ending Date" of the component line has the value ">= working date" – Production BOM Line

The following should happen:

- Item is used in an active BOM → the item status will not change – error message
Example: "Active BOMs exists. Item Status can not be changed"
- Item is not used in an active BOM → the item status will change

In order to accomplish the requirements new functions are provided.

If an user changes the status of a BOM into the value "certified" then the system will check the following for each BOM Line:

Do all item components which are used in the BOM Lines have an item status where the field "Production" has the value "true" inside the "Status Management"?

The following will happen:

If all components from the BOM Lines have the checkmark in the field "Production" → BOM status will change to "certified".

If NOT all components from the BOM Lines have the checkmark in the field "Production" → BOM status will not change to "certified". The system will create an error message:
Example: "Item XY is not released for bill of material."

In order to accomplish the requirements the functions are provided.

Item Status Management

The screenshot shows a table with columns: Status, Description, Style, Next Status Filter, Previous Status Filter, Production, Purchase, Sales, Create SKU, and a column titled "Check Usage in Production BOMs". The "Check Usage in Production BOMs" column is highlighted with a red border.

Status	Description	Style	Next Status Filter	Previous Status Filter	Production	Purchase	Sales	Create SKU	Check Usage in Production BOMs
1-NEW	New	Standard			<input type="checkbox"/>				
2-PHASE IN	Phase In	Standard			<input type="checkbox"/>				
A-NEW	New	Grey	B* C*		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
B-PHASEIN	Phase In	<i>Red + Italic</i>	C*	A*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
C-RELEASED	Released	Orange	D* E*	B*	<input checked="" type="checkbox"/>				
D-PHASEOU	Phase out	Blue	E* F*	C*	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
E-BLOCKED	Blocked	Blue + Bold	F* G*	D* C*	<input type="checkbox"/>				
F-DEAD	Dead	<i>Bold + Italic + Red</i>		E*	<input type="checkbox"/>				
G-TEST	TSTPL0031	Bold + Green		E*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

When changing an item status the system will check if the "check usage in production BOM" is set in the new status. If the checkmark is set then the system has to check if the item is used in an "active" BOM. The following should happen:

- Item is used in an active BOM
→ the item status will not change – error message
- Item is not used in an active BOM
→ the item status will change

If an user changes the status of a BOM into the value "certified" then the system will check the following for each BOM Line:

- Do all item components which are used in the BOM lines have an item status where the field "Production" has the value "true" inside the "Status Management".

The following will happen:

- If all components from the BOM lines have the checkmark in the field "Production" → BOM status will change to "certified".
- If NOT all components from the BOM lines have the checkmark in the field "Production" → BOM status will not change to "certified". The system will create an error message:

PRODUCTION BOM

200 · Bike 23

Process Prod. BOM Actions Navigate Fewer options

✖ The page has an error. Correct the error or try to [revert the change](#).

General

No.	200	...	Search Name
Description	Bike 23		Version Nos.
Unit of Measure Code	PCS	▼	Active Version
Status	Certified	▼	Last Date Mod.

Validation Results

Item 1000COPY is not released for bill of material (No. 200).

Lines Manage More options

Type	No.	Item Status	Description	Description 2	Quantit
→ Item	1000COPY	B-PHASEIN	BicycleCopy		
Item	1100	C-RELEASED	Front Wheel		

1.12.2.7 Block Item

It is possible to define for each status that an item will be set as blocked when changing to this status.

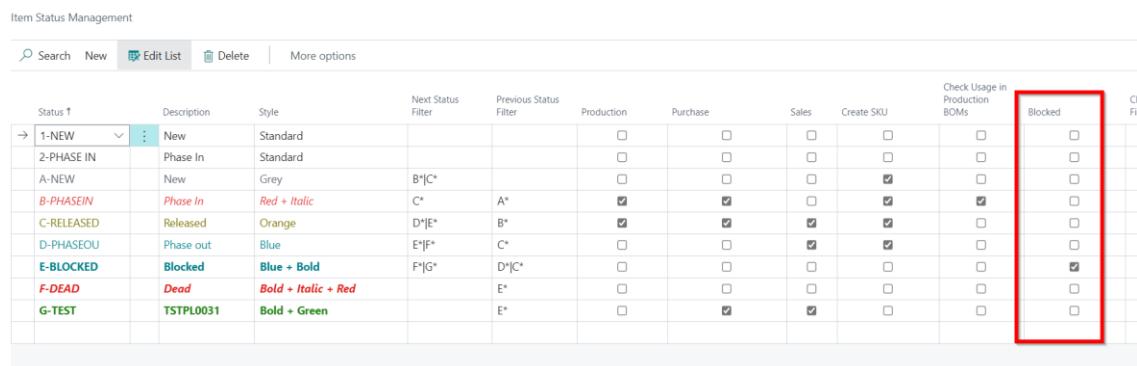
Therefore a setup is provided where the user is able to define for each item status that the item will be set as blocked when changing to this status.

The setup for blocking an item for each status is provided in the table / page "Status Management". The field to set the checkmark for each status line is called "Blocked".

When changing an item into a status – where the field "blocked" is set in the setup – then the standard BC field "blocked" on the item page will be set "true" automatically by the system.

This will work the other way around as well. When changing an item into a status – where the field "blocked" is not set in the setup then the standard BC field "blocked" on the item page will be set "False" automatically by the system.

In order to accomplish the requirements this functions are provided.



The screenshot shows a table titled "Item Status Management" with various columns: Status, Description, Style, Next Status Filter, Previous Status Filter, Production, Purchase, Sales, Create SKU, Check Usage in Production BOMs, and Blocked. A red box highlights the "Blocked" column, which contains checkboxes for each row. The rows represent different item statuses with their descriptions and styles.

Status	Description	Style	Next Status Filter	Previous Status Filter	Production	Purchase	Sales	Create SKU	Check Usage in Production BOMs	Blocked
→ 1-NEW	New	Standard			<input type="checkbox"/>					
2-PHASE IN	Phase In	Standard			<input type="checkbox"/>					
A-NEW	New	Grey	B+C*		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B-PHASEIN	Phase In	<i>Red + Italic</i>	C*	A*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
C-RELEASED	Released	Orange	D+E*	B*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
D-PHASEOU	Phase out	Blue	E+F*	C*	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-BLOCKED	Blocked	Blue + Bold	F+G*	D+C*	<input type="checkbox"/>	<input checked="" type="checkbox"/>				
F-DEAD	Dead	<i>Bold + Italic + Red</i>		E*	<input type="checkbox"/>					
G-TEST	TSTPL0031	Green		E*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

When changing an item into a status – where the field "blocked" is set in the setup – then the standard BC field "blocked" on the item page will be set "true" automatically by the system.

ITEM CARD

70067 · Test Item

[X](#) Reminder: your work date is 1/29/2021 [Use today | Change to... | Turn off reminder](#)

Process Item History Special Sales...es & Discounts Request Approval Actions Navigat

Item

No.	70067	UPG
Description	Test Item	Intro
Description 2	Status2	QC r
Inventory Value Zero	<input checked="" type="checkbox"/>	RST F
Blocked	<input checked="" type="checkbox"/>	RVO
Type	Inventory	Servi
Base Unit of Measure	PCS	Auto
Last Date Modified	7/6/2020	Comi
GTIN		Purch
Item Category Code		Cuttin
UPG 1		

Inventory

Shelf No.		Qty. i
Created From Catalog Item	<input checked="" type="checkbox"/>	Qty. i
Status	E-BLOCKED	Qty. i

1.12.2.8 Mandatory Fields

It is possible to define mandatory fields from the item card for each status and to define that the system should check the defined mandatory fields. Therefore a setup for each item status is provided.

With this setup the user are able to define that the system has to check mandatory fields. When changing an item status the system will check – in the setup – if mandatory fields should be checked.

The setup for checking if mandatory fields exist should be checked for each status by the system is provided in the new table / page "Status Management ". The field to set the checkmark for each status line is called "Check Mandatory Fields".

Furthermore a setup is needed where the user is able to define critical item fields – mandatory fields – for each item status.

The field "Check Mandatory Fields" on the page "Status Management" is a Boolean field. To define mandatory fields an action button is added to the "Status Management" page. This will open the listpage of the table "Mandatory Fields – Status".

The table "Mandatory Fields – Status" will have the following fields:

Field Name	Type	Description
Table ID	Integer	Holds the ID of the relevant table.
Status	Code (10)	Filled manually Table Relation to table "Item Status"
Field	Integer	Filled manually Table Relation to the fields of table "Item"
Field Name		Filled automatically by the system depending on the chosen "field". Shows the caption of the field.

When changing an item status the system will check if all mandatory fields – which are defined for the new status – are filled inside the item card.

The following will happen:

- All mandatory fields are filled → the item status will change
- Not all mandatory fields are filled → the item status will not change – error message.

Example:

"Not all mandatory fields for the item are filled. Following fields are mandatory fields for the new status:

- Item Status cannot be changed."

The system will check the required fields when the user changes the item status on the item card – using the new functions "Next Status" and "Previous Status".

In order to accomplish the requirements the functions are provided.

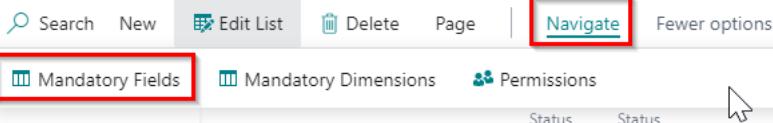
Item Status Management

Status ↑	Description	Style	Next Status Filter	Previous Status Filter	Production	Purchase	Sales	Create SKU	Check Usage in Production BOMs	Blocked	Check Mandatory Fields
→ 1-NEW	New	Standard			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
2-PHASE IN	Phase In	Standard			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
A-NEW	New	Grey	B C*	A*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B-PHASEIN	Phase In	<i>Red + Italic</i>	C*	A*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C-RELEASED	Released	Orange	D E*	B*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D-PHASEOU	Phase out	Blue	E F*	C*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-BLOCKED	Blocked	Blue + Bold	F G*	D C*	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>				
F-DEAD	Dead	Red + Italic + Red	G*	E*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
G-TEST	TSTPL0031	Bold + Green		E*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Define "Status" and "Mandatory Field ID"

ITEM STATUS MANAGEMENT

× Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder



MANDATORY FIELDS - STATUS

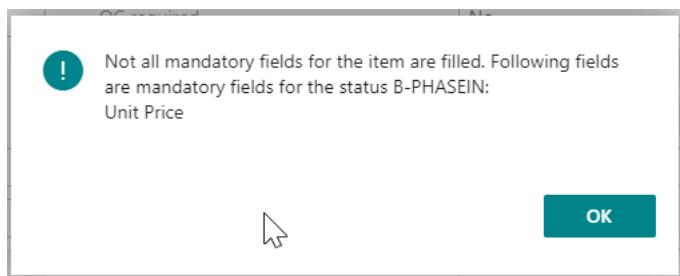
✓ SAV

× Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Search New Edit List Delete Page

Status ↑	Field ID ↑	Field Name
→ B-PHASEIN	8	Base Unit of Measure
B-PHASEIN	18	Unit Price

When changing an item status the system will check if all mandatory fields – which are defined for the new status – are filled inside the item card.



The mandatory fields have to be filled before the status can be changed.

1.12.2.9 Dimension

It is possible to define mandatory dimensions for each status. Therefore a setup for each item status is provided. With this setup the user is able to define that the system should check mandatory dimensions. When changing an item status the system will check – in the setup – if dimensions should be checked.

The field to set the checkmark for each status line is called "Check Mandatory Dimensions". Furthermore a setup is needed where the user is able to define mandatory dimensions for each item status.

The field "Check Mandatory Dimensions" on the page "Status Management" is a Boolean field. To define mandatory dimensions an action button will be added to the "Status Management" page. This will open the listpage of the table "Mandatory Dimensions – Status".

The new table "Mandatory Dimensions – Status" includes the following fields:

Field Name	Type	Description
Table ID	Integer	Hold the ID of the relevant Table
Status	Code (10)	Filled manually Table Relation to table "Item Status"
Dimension	Code (20)	Filled manually Table Relation to table "Dimension" (348)

When changing an item status the system will check if all mandatory dimensions – which are defined for the new status – are set for the item.

The following will happen:

- All mandatory dimensions are filled → the item status will change
- Not all mandatory dimensions are filled → the item status will not change – error message.

Example:

"Not all mandatory dimensions for the item are filled. Following dimensions are mandatory dimensions for the new status:

"Item Status cannot be changed."

In order to accomplish the requirements the functions are provided.

Status ↑	Description	Style	Next Status Filter	Previous Status Filter	Production	Purchase	Sales	Create SKU	Check Usage in Production BOMs	Blocked	Check Mandatory Fields	Check Mandatory Dimensions
→ 1-NEW	New	Standard			<input type="checkbox"/>							
2-PHASE IN	Phase In	Standard			<input type="checkbox"/>							
A-NEW	New	Grey	B*I*C*		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B-PHASEIN	Phase In	<i>Red + Italic</i>	C*	A*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
C-RELEASED	Released	Orange	D*I*E*	B*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D-PHASEOU	Phase out	Blue	E*I*F*	C*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-BLOCKED	Blocked	Blue + Bold	F*I*G*	D*I*C*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
F-DEAD	Dead	<i>Bold + Italic + Red</i>		E*	<input type="checkbox"/>							
G-TEST	TSTPL0031	Green			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

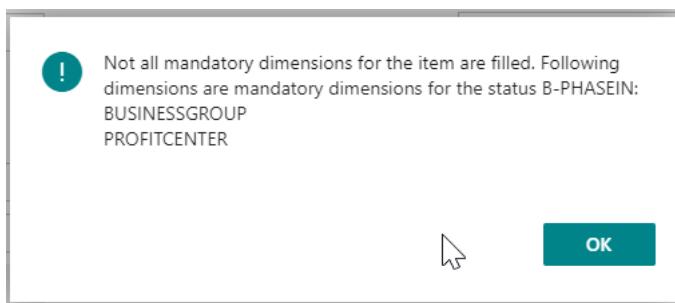
To define mandatory dimensions an action button was added to the "Status Management" page. Item List or Item Card – Item Status Management – Mandatory Dimensions

This will open the listpage of the new table "Mandatory Dimensions – Status".

Status ↑	Dimension Code ↑	Dimension Code Name
→ B-PHASEIN	BUSINESSGROUP	Business Group
B-PHASEIN	PROFITCENTER	Profitcenter

Define "Status" and "Dimension Code"

When changing an item status the system will check if all mandatory dimensions – which are defined for the new status – are set for the item.

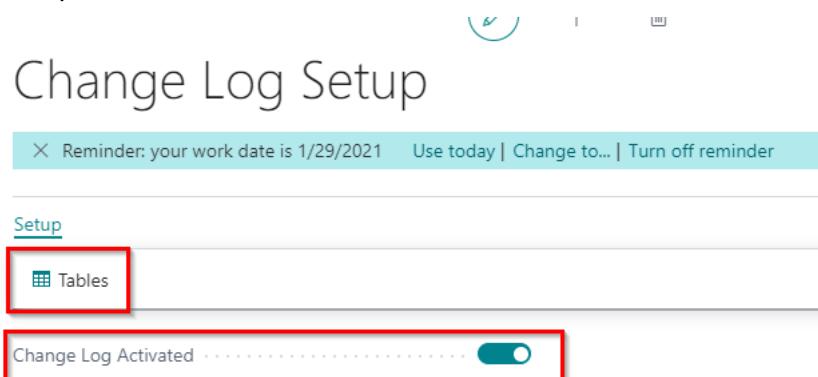


The mandatory dimensions have to be added before the status can be changed.

1.12.2.10 Change Log of the field "Status" from table "Item"

Changes in the field "Status" of table "Item" should be logged.

Therefore the new field "Status" of table "Item" needs to be available in the Change Log Setup.



Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Setup

Tables

Change Log Activated

EDIT - CHANGE LOG SETUP (TABLE) LIST

ID ↑	Name	Log Insertion	Log Modification	Log Deletion
23	Vendor			
24	Vendor Invoice Disc.			
25	Vendor Ledger Entry			
→ 27	: Item	Some Fields	Some Fields	
30	Item Translation			
31	Item Picture Buffer			

EDIT - CHANGE LOG SETUP (FIELD) LIST - 0

No. ↑	Field Caption	Log Insertion	Log Modification
21850	Has Sales Forecast	<input type="checkbox"/>	<input type="checkbox"/>
27000	SAT Item Classification	<input type="checkbox"/>	<input type="checkbox"/>
60000	Introduction Date	<input type="checkbox"/>	<input type="checkbox"/>
→ 60001	: Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
60002	Planning Person	<input type="checkbox"/>	<input type="checkbox"/>
60003	QC required	<input type="checkbox"/>	<input type="checkbox"/>
60004	ABC-Status	<input type="checkbox"/>	<input type="checkbox"/>
60005	XYZ-Status	<input type="checkbox"/>	<input type="checkbox"/>

Corrections have been made to the Live Cycle Management.

- When certifying a BOM, it is also checked if item on lower levels all have a status which allows production
- The error message has been corrected from "Stauts change aborted" to "Status change aborted"
- The error message has been corrected from "The User XY has no permission to modify in the stauts 2-Purchase" to „The User XY has no permission to modify in the status 2-Purchase"
- Colour-coding for "Blue + Bold" has been corrected.
- The action button for the Item Status Management has been removed from the Item Card and Item List and added to the menu "Departments / Warehouse / Setup / Inventory"
- When activating the Item Status Management in the Inventory Setup, and after giving the initial status for blocked and not blocked items, a window opens to

show BC is setting the initial status and another short message, when the setting is finished.

- When the user cannot be found in the permissions for the status then the status with the user [empty] will be called upon to decide, what the user can and cannot do
- Mandatory fields and dimension will not be checked when a user closes the item card
- Error when selecting a resource in the sales or purchase lines has been corrected

In the following pages the functionality displaying the colouring for the item in sales or purchase line has been added:

- Purchase Order Subform
- Blanket Sales Order Subform
- Blanket Purchase Order Subform
- Sales Return Order Subform
- Purchase Return Order Subform

Lines	Manage	More options		
Type	No.	Description	Description 2	Location Cr.
→ Item	: 1850	Saddle	saddle desc 2	

1.12.3 *Item Copy Rules*

With the BC standard function "copy item" it is possible to copy items. When copying an item, all item fields from the item will be copied into the new item. However there will be an exception:

The item field "Status" – above mentioned – will not be copied into the new item. The Status an item will get – when copying an item – will be the default value which is selected in the Basic Setup as default value.

In order to accomplish the requirements new functions are provided.

Note: Mandatory fields and dimensions will not be considered when copying an item.

When using the function "copy item" the entries of the fields "GTIN" and "Introduction Date" will not be copied anymore. There will be no values inside the fields in the new created item. Report 60000 "Set Introduction Date on Item" can be ran to fill the date "introduction date". The field "GTIN" can be filled manually

1.12.4 Non-Stock Items usage in Sales Order

A non-stock item turned into a "normal" item is now set with the default status from the inventory setup.

This is done when either creating an item from a non-stock item directly, or when choosing a non-stock item from the sales order.

ITEM CARD

8008 · test Non stock

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Item History Special Sales...es & Discounts Request Approval Actions Navigate

Item

No.	8008	...	UPG 2
Description	test Non stock	Introdu	
Description 2	test Non stock	QC req	
Inventory Value Zero	<input checked="" type="checkbox"/>	RST Ris	
Blocked	<input checked="" type="checkbox"/>	RVO Ri	
Type	Non-Inventory	Service	
Base Unit of Measure	PCS	Autom:	
Last Date Modified	9/9/2020	Comm:	
GTIN		Purcha:	
Item Category Code		Cutting	
UPG 1			

Costs & Posting	
COST DETAILS	
Costing Method	FIFO
Standard Cost	0.00 ...
Unit Cost	0.00 ...
POSTING	
Gen. Pr	
VAT Prc	
Tax Grp	

ITEM CARD

8008 · test Non stock

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Item History Special Sales...es & Discounts Request Approval Actions Na

Item

No.	8008	...
Description	test Non stock	
Description 2	test Non stock	
Inventory Value Zero	<input checked="" type="checkbox"/>	
Blocked	<input type="checkbox"/>	
Type	Inventory	▼
Base Unit of Measure	PCS	▼
Last Date Modified	9/9/2020	
GTIN		
Item Category Code		▼
UPC 1		▼
Inventory		
Shelf No.		
Created From Catalog Item	<input type="checkbox"/>	
Status	A-NEW	

1.12.5 User Permission

It is possible to define user permissions for every item status. This user permissions will be based on the Standard BC permission process.

With the Role Centers in BC the permissions of every user can be controlled. With this standard BC permission process the users are able to do their daily work.

A new user permission setup will replenish the existing BC permission functions. It will be possible to define user permissions for every item status.

Therefore a setup for each user and item status is provided. With this setup the user will be able to define user permissions for every item status.

In chapter "Item Status setup" a setup "Status Management" is described where the users are able to define the different item status. In this setup page "Status Management" a new function "User Permission" is available as action button.

In the page "Status Management" the user will select a status line for which the user wants to define user permissions. When using the new function "User Status Permission" a new setup page "User Status permission" will appear. There the user can define user permissions for every item status.

The table and page "User Status Permission" has the following fields:

Field Name	Type	Description
Table ID	Integer	Holds the ID of the relevant table
Status	Code (10)	Filled manually Table Relation to table "Status Management"
User ID	Code (20)	Filled manually Table Relation to table "Users"
Modify	Boolean	a checkmark indicates that an item with this status can be modified by the selected user
Delete	Boolean	a checkmark indicates that an item with this status can be deleted by the selected user
Allowed Status Action	Option	Allowed Status Action defines if the user is allowed to activate / deactivate the next / previous status of the current item status. Possible options: <ul style="list-style-type: none"> • All • Activate • Deactivate • None

On the page "User Status Permission" the following options are available to set item status for each user:

- Modify Item
- Delete Item
- Allowed Status Actions

Modify Item:

A checkmark indicates that an item with this status can be modified by the selected user – to modify the fields of the item card

Delete Item:

A checkmark indicates that an item with this status can be deleted by the selected user
Note: the BC standard functionalities to delete an item have priority – that means that if the item cannot be deleted in BC standard, it can also not be deleted when this checkmark is set.

Allowed Status Actions:

Allowed Status Actions means which option of action the user is permitted to change an item status.

There the user should be able to select from the following options:

- All
- Activate
- Deactivate
- None

All → The user is able to change to / from this status

Activate: → The user can change into the selected status – however the user is not able to change into another status if the user is not allowed to deactivate the current status

Deactivate: → The user can change from the selected status – however the user is only able to change into another status if the new item status is selected with "activate"

None: → The user is not able to change to / from this status of an item – however if the checkmark is set in "Modify Item" – the user is allowed to change all other fields of the item card

The following will show the logic behind this and how it should work including examples:

Status	User ID	Allowed Status Actions
2-PURCHASE	PAUL	Deactive
3-PRODUCTION	PAUL	Deactive
5-RELEASED	PAUL	All
6-FADEOUT	PAUL	All
9-BLOCKED	PAUL	Activate
99-DEAD	PAUL	Activate

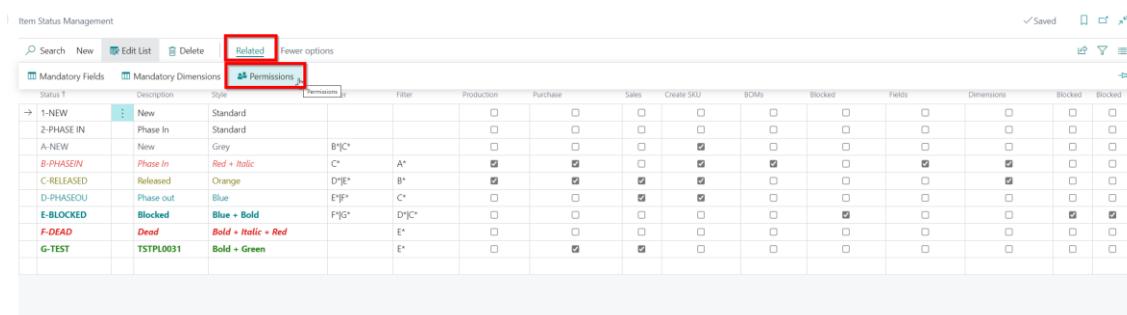
It means that user Paul is allowed to leave (deactivate) status 2 and 3 and is allowed to set (activate Status 5,6,9,99).

For example:

- Item status is 9 : User Paul can not change to another status (permission is only activate).
- Item status is 5 : User Paul is allowed to leave this and switch to 6, 9 and 99
- User Paul wants to change from Status 2 to 3 → is not allowed because permission on Status 3 is only deactivate not activate

A combination of several "checkmarks" must be guaranteed. The setup "User Setup Permission" needs to be done for every user.

Note: If no specific user authorization is used, at least one authorization line for user <empty> should be defined with the required checkmarks set to "true".



PERMISSIONS - STATUS

✓ SAVED

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Search New Edit List Delete Page

Status ↑	User ↑	Modify	Delete	Allowed Status Action
→ 1-NEW	520-D365-CONSULT1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All
1-NEW	BORIS.GRAEBENER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All
1-NEW	MICHAEL.BARGANSKI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All

Modify Item: a checkmark indicates that an item with this status can be modified by the selected user – to modify the fields of the item card

Delete Item: a checkmark indicates that an item with this status can be deleted by the selected user

The setup "User Setup Permission" needs to be done for every user.

Note: If no specific user authorization is used, at least one authorization line for user <empty> should be defined with the required checkmarks set to "true".

1.12.6 **Move field “Status” on item card page from tab inventory to tab item (formerly tab General)**

On page item field “Status”, which displayed current item status, is moved from tab inventory to tab item.

Test case 1:

Check item Status Setup functionalities: Choose Default value and try to generate a new item to see if the item gets the default item status. Check initial status for blocked / unblocked items which already exist.

Test case 2:

Change items to different item status. Setup different color for each status. Check the status color of the defined fields.

Test case 3:

Check functionalities of setup where the user can define into which next or previous status an item status can be changed.

Test case 4:

Create or modify different items with different item status. For one status the field "Purchase" in the Status Management is checkmarked – for the other status the field "Purchase" is not check marked. Create a purchase order with the items and check if you can use the items. Check error messages. Do the same as for test case 2 however do it for the fields Sales, Production.

Test case 5:

Use one item which has an item status where the field "Create SKUs" is checkmarked in the Status Management – and one item where the field "Create SKUs" is not check marked. Try to create SKUs for both items. Check error messages.

Test case 6:

Change an item status into a status where the checkmark "check usage in production BOM" is checkmarked and the item is used in an active BOM. Check if the following will happen: the item status will not change – error message.

Change an item status into a status where the checkmark "check usage in production BOM" is checkmarked and the item is not used in an active BOM. Check if the following happens: the item status will change.

Test case 7:

Check that the field "Blocked" on the "Item Card" turns "True" when you change an item to a status which has the field "blocked" checkmarked in the Status Management.

Test case 8:

Change into an item status where mandatory fields are defined for the new status. Check if the following happens: All mandatory fields are filled → the item status will change
Not all mandatory fields are filled → the item status will not change – error message.

Test case 9:

Change into an item status where mandatory dimensions are defined for the new status.
Check if the following happens: All mandatory dimensions are filled → the item status will change.
Not all mandatory dimensions are filled → the item status will not change – error message.

Test case 10:

Copy an item with the BC standard function "copy item". Check if the following happens:
When copying an item all item fields from the item will be copied into the new item. However there will be an exception:
The item field "Status" will not be copied into the new item. The Status an item will get – when copying an item – will be the default value which is selected in the Basic Setup as default value.

Test case 11:

Define different user permissions for different status and user. (Modify, Delete, Allowed Status Action) and check the functionalities.

Refere to testsscripts: TSTPL0030, TSTPL0031, TSTPL0032, TSTPL0033, TSTPL0034, TSTPL0035, TSTPL0036, TSTPL0037, TSTPL0038, TSTPL0039, TSTPL0040, TSTPL0045, TSTPL0058, TSTPL0059, TSTPL0060, TSTPL0061, TSTPL0062, TSTPL0063, TSTPL0065, TSTPL0066, TSTPL0067, TSTPL0068, TSTPL0069, TSTPL0070, TSTPL0071, TSTPL0072, TSTPL0073, TSTPL0074

1.13 Reporting Fields on the Item / Vendor and Customer Card (CORE modification)

For risk assessment the following fields are needed in the "Vendor –" / "Customer Card" or the "Item Card". The fields are inserted in a "FastTab" "Risk Management".

Requirements were defined at risk meeting / workshop.

New fields for the Vendor / Customer:

Field Name	Type	Description
ABC-Status	Option A,B,C editable	Filled with a Report (see below)
DUNS-No.	Code 10	Filled manually

New fields for the Item:

Field Name	Type	Description
GTIN	Code 14	Only numeric, the field is filled manually
UPG		No customization, Existing field "Item Category" and "Product Group" is used Filled manually
ABC-Status	Option A,B,C	See 1.2.2
XYZ-Status	Option X,Y,Z	Filled manually, See 1.2.2
RST Risk	Option R,S,T,O	Filled with a report, for details see below
RVO Risk	Options: <3M, 3M..12M, 12M..36M, >36M, No usage	Filled with a Report, described in Key User Document Finance Reporting Out of scope for this Key User Document
Introduction Date	Date	Filled by a report

		For details see Key User Document Sales 2.18
--	--	---

ABC-Status (Vendor)

The calculation is the same as for items. Instead of calculating the usage volume per item, the purchase volume per vendor is calculated. Then a list of purchase volumes per vendors is created temporarily and the categorization in A,B or C is made as for items.

ABC-Status (Customer)

As ABC-Status (Vendor) instead of the purchase volume the sales volume is used.

RST Risk:

With this value the dependence per item on one customer is measured. All items that are sold are considered. The net sales amount of one item in the last 6 months is defined as 100 %. Then the percentage X per customer is determined. The rating is as follows:

- T (Very Strong Risk) for all items with $X \geq 75\%$
- S (Strong Risk) for all items with $75\% > X \geq 50\%$
- R (Risk) for all items with $50\% > X \geq 25\%$
- O (Without Risk) for all items with $25\% > X$

For risk assessment the following fields have been created for either the vendor and customer or the item. The fields will be shown in the lists and cards. In the cards the fields be shown in the FastTab General.

For the vendor and customer the new fields "DUNS-No." and "ABC-Status" have been added.

Vendor Card:

VENDOR CARD

01254796 · Progressive Home Furnishings

Process	Report	Request Approval	New Document	Navigate	Vendor	Actions	Navigat
General							
No.	01254796			...	Balance		
Name	Progressive Home Furnishings			Docum			
Blocked				Search			
Privacy Blocked	<input checked="" type="checkbox"/>			IC Parti			
Last Date Modified	9/8/2020			Compa			
ABC-Status	C			Purcha			
DUNS-No.				Respor			
No of Open Related Complaint	0			Disable			
Balance (\$)	125,687.93						

Vendor List:

CRONUS US DEMO, Inc.									Finance	Cash Management	Sales	Purchasing	Setup & Extensions	Intelligent Cloud Insights
Customers		Vendors	Items	Bank Accounts	Chart of Accounts	Inventory Setup	Item Status Management	Pay Vendor	Vendor Ledger Entries					
Vendors:		All	Search		+ New	Delete	Process	New Document	Vendor	Actions	Page	Navigate	Reminder: your work date is 1/29/2021	
X Use today Change to... Turn off reminder														
No. ↑	Name	Locati...	Phone No.	Tax Registration No.	Contact	Comp...	Search Name	ABC-Status	DUNS-No.					
01254796	Progressive Home Furnishings			Mr. Michael Sean Ray	PROGRESSI...	C							F	
01587796	Custom Metals Incorporated			Mr. Peter Houston	CUSTOM M...								D	
01863656	American Wood Exports		503912693	Mr. Jeff D. Henshaw	AMERICAN...								C	
01905283	Mundersand Corporation			Mr. Mike Hines	MUNDERS...									
01905382	NewCaSup			Mr. Toby Nixon	NEWCASU...								AERGQERG	
01905777	OakvilleWorld			Mr. Sean P. Alexander	OAKVILLE...									
10000	London Postmaster	4255550101	895741963	Mrs. Carol Philips	LONDON P...									
20000	AR Day Property Management	YELLOW	274863274	Mr. Frank Lee	AR DAY PR...									
30000100	MLI - MUNICIPAL LOGISTICS INC			Mr. John Doe	MLI - MUN...									

While the first two are filled manually by the user, the "ABC-Status" is filled via calculation.

VENDOR CARD



01587796 · Custom Metals Incorporated

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process	Report	Request Approval	New Document	Navigate	Vendor	Actions	Navigate	Report	Fewer options
Apply Template...	Pay Vendor	Create Payments...	Calculate ABC-Status						

The calculation is the same as for items. Instead of calculating the usage volume per item, the purchase volume per vendor or sales volume per customer is calculated. Then a list is created temporarily and the categorization in A, B or C is made as for items.

For the item the fields "GTIN", "RVO Risk" and "RST Risk" have been created and added.

Item Card:

ITEM CARD



1100 · Front Wheel

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

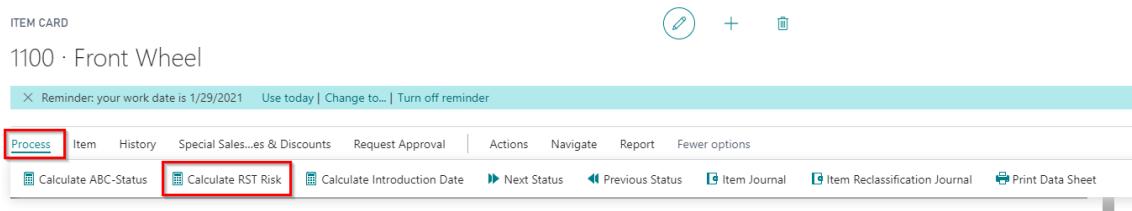
Process	Item	History	Special Sales...es & Discounts	Request Approval	Actions	Navigate	Report	Fewer options	
Item									
No.	1100	UPG 2	Show less						
Description	Front Wheel	Introduction Date							
Description 2		QC required							
Inventory Value Zero	<input checked="" type="checkbox"/>	RST Risk							
Blocked	<input checked="" type="checkbox"/>	RVO Risk							
Type	Inventory	Service Item Group							
Base Unit of Measure	PCS	Automatic Ext. Text							
Last Date Modified	5/3/2020	Common Item No.							
GTIN		Purchasing Code							
Item Category Code		Cutting							
UPG 1									

Item List:

CRONUS US DEMO, Inc. | Finance ▾ Cash Management ▾ Sales ▾ Purchasing ▾ Setup & Extensions ▾ Intelligent Cloud Insights ▾

Items: All											Search	New	Delete	Process	Item	Request Approval	Inventory	Attributes	Page	Actions	Navigate	Report	Fewer options
X Reminder: your work date is 1/29/2021 Use today Change to... Turn off reminder																							
No. ↑	Production BOM No.	Routing No.	Base Unit of Measure	Cost is Adj...	Unit Cost	Unit Price	Vendor No.	Planning Person	QC required	ABC-Status	XYZ-Status	GTIN	RST Risk	Default Deferr. Templa									
1000	1000	1000	PCS	<input checked="" type="checkbox"/>	350.595	4,000.00			No	A	X	123456789											
1000COPY	1000	1000	PCS	<input checked="" type="checkbox"/>	350.595	4,000.00			No	C	X	1234567891											
1001	1000	1000	PCS	<input checked="" type="checkbox"/>	350.595	4,000.00			No	C													
1100	1100	1100	PCS	<input checked="" type="checkbox"/>	129.671	1,000.00	20000		No	C													
1110			PCS	<input checked="" type="checkbox"/>	1.05	0.00	30000	AHA	No	C													
1120			PCS	<input checked="" type="checkbox"/>	2.00	0.00	01587796	AHA	No	C													
1150	1150	1150	PCS	<input checked="" type="checkbox"/>	12.441	500.00	AHA		No	C													

The field "GTIN" is filled manually by the user and only allows numerical values. "RVO Risk" is a text field with text option "Empty,<3M, 3M..12M, 12M..36M, >36M, No usage". The field RVO Risk in the item card has been made "none editable". The "RST Risk" is calculated and can therefore not be inserted manually.



1.13.1 Classification on Item in RVO Fast Tab (CORE modification)

The field classification on the item has been expanded with a new first option for empty ("").

RVO Date	
Classification	
Valuation Allowance %	0
Valuation Allowance Amount	0.00

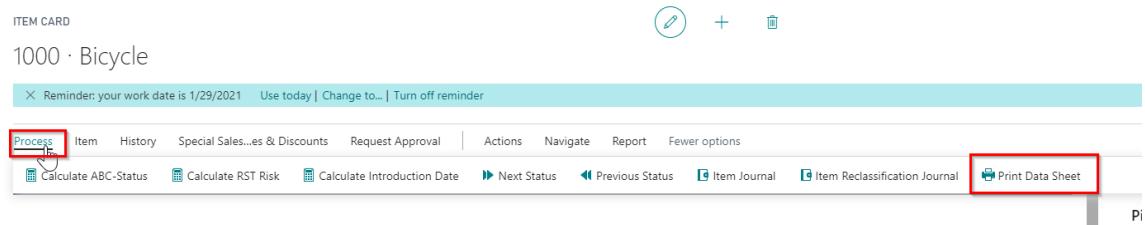
1.13.2 Devitation between BC and Management Handbook (CORE modification)

In table 27 "Item", the field "RVO Risk" was an option field. This is now changed. The field "RVO Risk" inside table / page "item" is now a text field (length20) – not editable

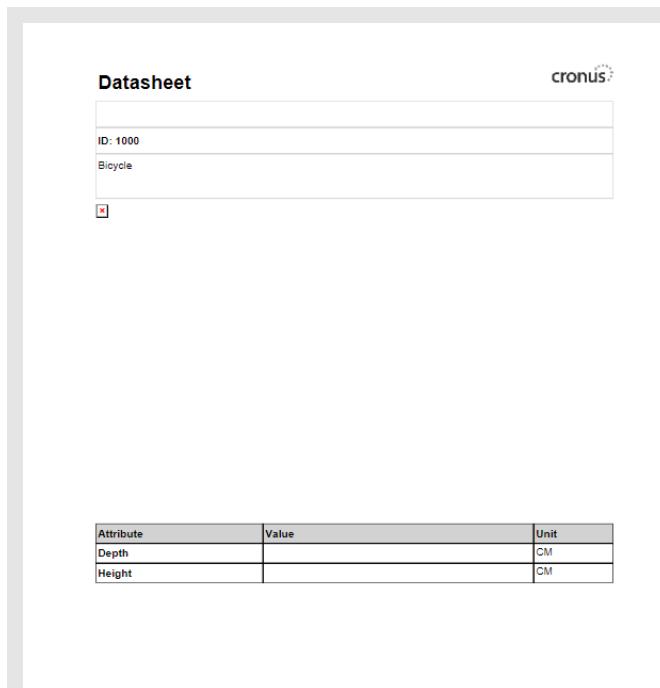
No.	1100	UPG 2	
Description	Front Wheel	Introduction Date	
Description 2		QC required	No
Inventory Value Zero	<input checked="" type="checkbox"/>	RST Risk	
Blocked	<input checked="" type="checkbox"/>	RVO Risk	
Type	Inventory	Service Item Group	

1.13.3 Core DataSheet (CORE modification)

Added new action to the item pages to print item data sheet. The action button opens the report with ID 63017, which is not part of the CORE programming. The report has to be designed on customer side.



With CORE Release 4.05 this new report was added to the item page. The report was not designed for CORE Release 4.05. The design for Report ID 63017 "Print Data Sheet" is now finished.

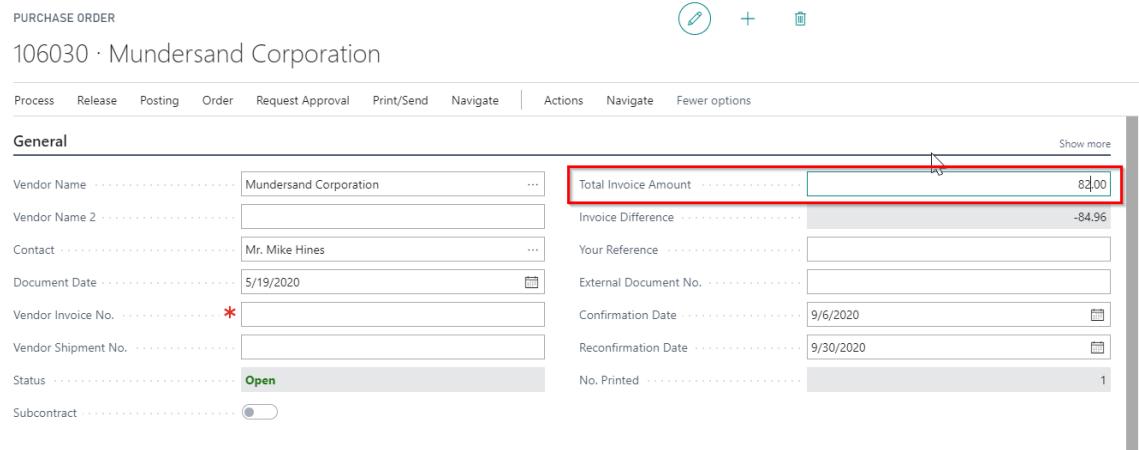


Attribute	Value	Unit
Depth		CM
Height		CM

1.14 Total Invoice Amount (CORE modification)

Purchase Invoice Page Changes

A field "Total Invoice Amount". This Field contains the amount with VAT of the paper invoice.



The screenshot shows the 'Purchase Order' page with the 'General' fast tab selected. The 'Total Invoice Amount' field is highlighted with a red box. The value '84.00' is displayed in the field. Other fields visible include Vendor Name (Mundersand Corporation), Vendor Name 2, Contact (Mr. Mike Hines), Document Date (5/19/2020), Vendor Invoice No. (marked with a red asterisk *), Vendor Shipment No., Status (Open), Invoice Difference (-84.96), Your Reference, External Document No., Confirmation Date (9/6/2020), Reconfirmation Date (9/30/2020), and No. Printed (1).

The field "Total Invoice Amount" has been added to the Purchase Header table and the Purchase Order Page in the FastTab General. The "Total Invoice Amount" must have the same value as the Flowfield "Amount Including VAT" in the Purchase Header before the purchase order can be posted.

1.14.1 CodeUnit 90 – Purch.-Post

Added functionality when posting an invoice, validate that the invoice total amount with VAT is equal to "Total Invoice Amount" on Purchase Header. This will only apply to the document type Invoice.

Test case:

Create a Purchase Order and deliver its lines. Then create an invoice with the same amount as the full order amount and fill the field "Total Invoice Amount" on the Invoice and post the invoice.

Create a Purchase Order and receive the lines. Now create an invoice with "Total Invoice Amount" greater or less than the total order amount and post it. This should generate an error message in BC.

Refere to testscript TSTPL0047, TSTPL0048

1.14.2 *Exception handling and error messages*

The actual code that handles exceptions is in CodeUnit 90 – Purch.-Post. There is one exception to look for:

If "Total Invoice Amount" is not equal to the total value of the invoice then an error message will be sent and the posting will be interrupted.

1.15 Default Posting Value (CORE modification)

1.15.1 *Proposed Changes to BC*

The field "Default Posting Value" has removed Purchase & Payables Setup table and page. Microsoft had delivered with Wave 1 2023 an similar function called "Define an invoice posting policy for various users". This function does the same as the Core modification. Additionally this function allows Administrators or responsible users to define per each single user posting values.

1.15.2 *Purch.-Post (Yes / No) CodeUnit*

Changes in CodeUnit 91 – Purch.-Post (Yes / No). Instead of using the static value (Receive and Invoice) for posting we use "Default posting Value" from the Purchases & Payables Setup.

1.16 "Vendor Shipment No" in "Posted Purchase Receipts" and "Get Receipt Lines" (CORE modification)

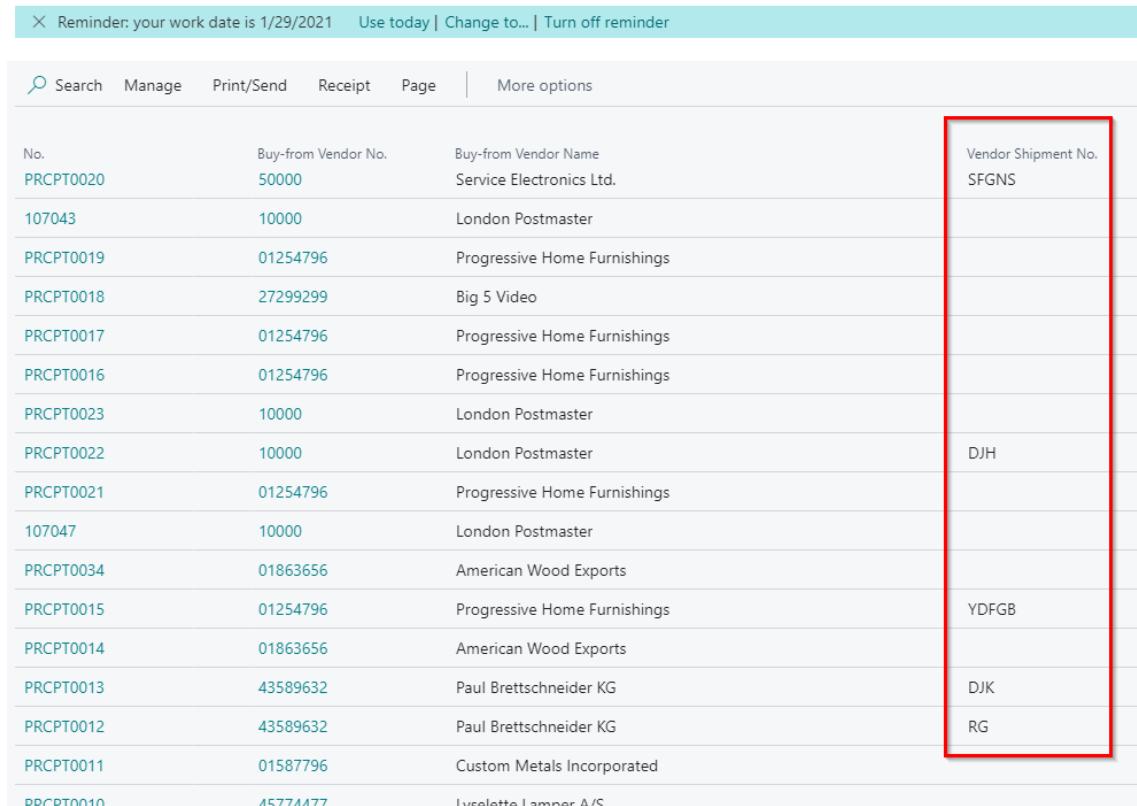
The field "Vendor Shipment No." from the receipt header is shown in:

- Page "Posted Purchase Receipts"
- Page "Get Receipt Lines"

Because the field doesn't exist in the lines, a flowfield is inserted in table "Purch. Rcpt. Line".

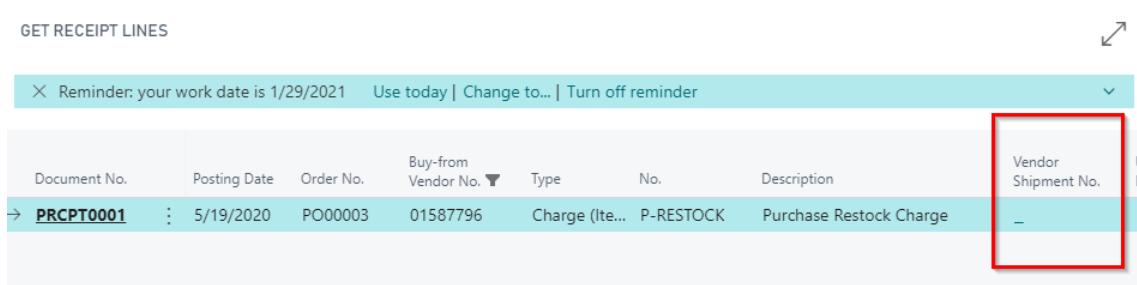
The field "Vendor Shipment No." is inserted in the pages "Posted Purchase Receipts" and in the page "Get receipt Lines".

POSTED PURCHASE RECEIPTS



No.	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Shipment No.
PRCPT0020	50000	Service Electronics Ltd.	SFGNS
107043	10000	London Postmaster	
PRCPT0019	01254796	Progressive Home Furnishings	
PRCPT0018	27299299	Big 5 Video	
PRCPT0017	01254796	Progressive Home Furnishings	
PRCPT0016	01254796	Progressive Home Furnishings	
PRCPT0023	10000	London Postmaster	DJH
PRCPT0022	10000	London Postmaster	
PRCPT0021	01254796	Progressive Home Furnishings	
107047	10000	London Postmaster	
PRCPT0034	01863656	American Wood Exports	
PRCPT0015	01254796	Progressive Home Furnishings	YDFGB
PRCPT0014	01863656	American Wood Exports	
PRCPT0013	43589632	Paul Brettschneider KG	DJK
PRCPT0012	43589632	Paul Brettschneider KG	RG
PRCPT0011	01587796	Custom Metals Incorporated	
PRCPT0010	45774477	Iusellette Lamper A/S	

GET RECEIPT LINES



Document No.	Posting Date	Order No.	Buy-from Vendor No.	Type	No.	Description	Vendor Shipment No.
→ PRCPT0001	5/19/2020	PO00003	01587796	Charge (It... P-RESTOCK	Purchase Restock Charge		—

1.17 Move field status on item card page

At Business Central different item types are avail. If you select item type "Non-Inventory" or "Service" and item status management is active, no status change on item card is possible.

Furthermore no usage in sales or purchase documents is allowed for this item.

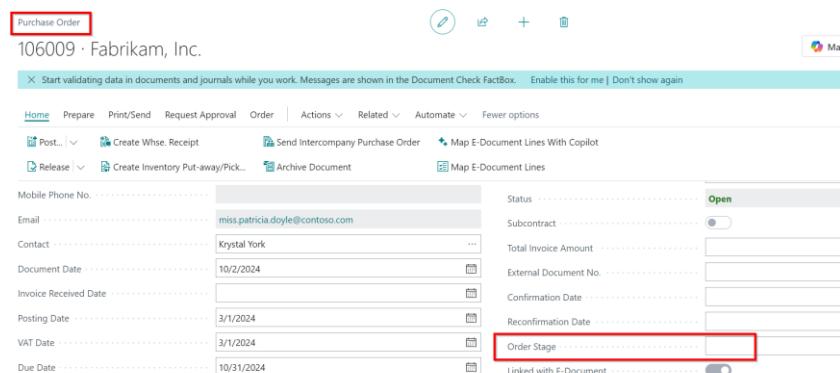
The field “Status” (ID65001) is moved from tab inventory to tab item (former General) at item page card.

1.18 New table at Purchase Header to store additional status (PM Base 11.24.0.6)

Standard Status at Purchase Documents are “ Open, Released, Pending Prepayment, Pending Approval”

To get an better overview of the status an additional field is implemented at Purchase Documents called “Order Stages”.

Behind these fields a table exists where PM Companies can insert – depending on their own needs – a Code field and a description.



Select - Order Stages		<input type="button" value="New"/>	<input type="button" value="Edit List"/>	<input type="button" value="..."/>
<input type="button" value="Search"/>				<input type="button" value="..."/>
Code ↑	Description			
→ <u>001</u>	:	Drawing missing		
002		Approval missing		

1.19 Correction Drop Shipment for item related resources (PM Base 11.24.0.4)

Sales Order and Purchase Order are connected via Drop Shipment. Sales Order contains 4 item lines. 2 of them has a item related resource line. In case you do the receiptment first from purchase order you will get an error message. If you do the shipment first from sales order everything is fine. This is also now possible in cas you do the receiptment first.

1.20 Modification for Drop Shipment to open in editable mode (PM Base 12.25.0.2 + PM Base 11.24.0.8)

Sales Order and Pruchase Order are linked as a Drop Shipment. To insert changes like Qty or Dates users open the related document from source document. The related document opens now in an editable mode. Please take in account that the document status has to changes into “Open” manually.

1.21 Correction Item Card field “Qty in Blanket Purchase Order” (PM Base 11.24.0.5)

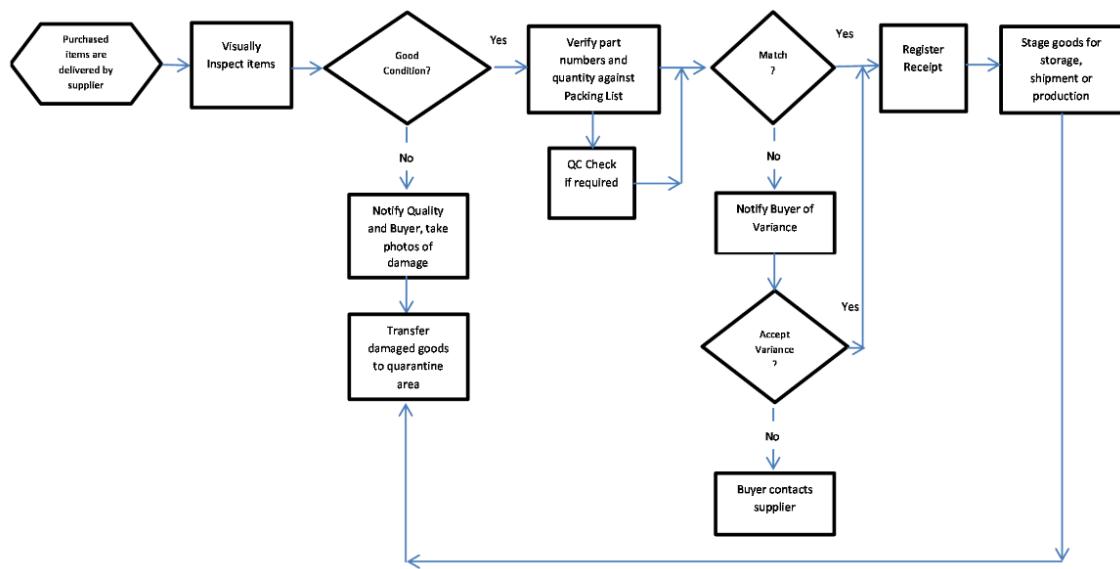
At item card page a new Core field exists - called “Qty in Blanket Purchase Orders”. This field is not calculated correct.

2 Logistics

2.1 Receive and Put-away (using Warehouse)

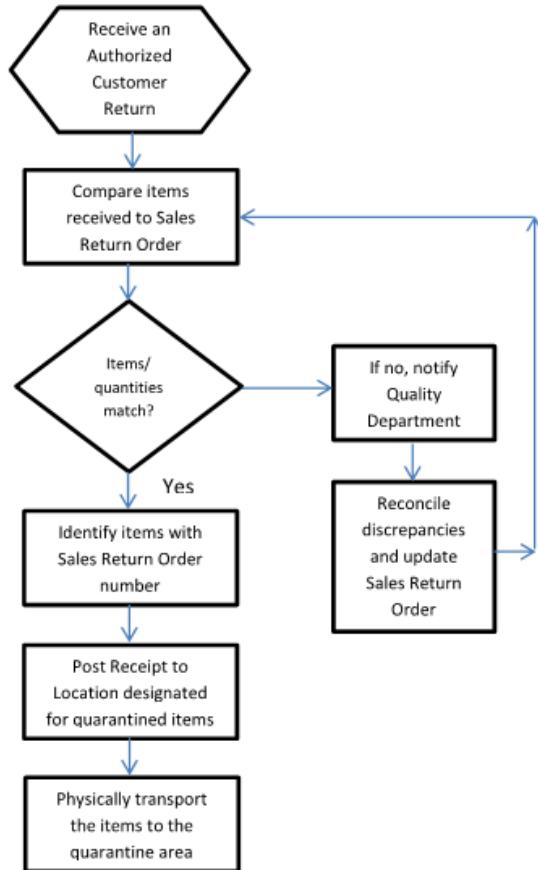
2.1.1 Process Receipt of Purchased Items

When the items arrive, the employee checks, if they are in good condition, the quantity is verified and if the quantity matches the purchase order. If it is an item that needs quality control (field "QC required as defined above") the item is posted to a QC inventory first.



2.1.2 Process of Receipt of Customer returns

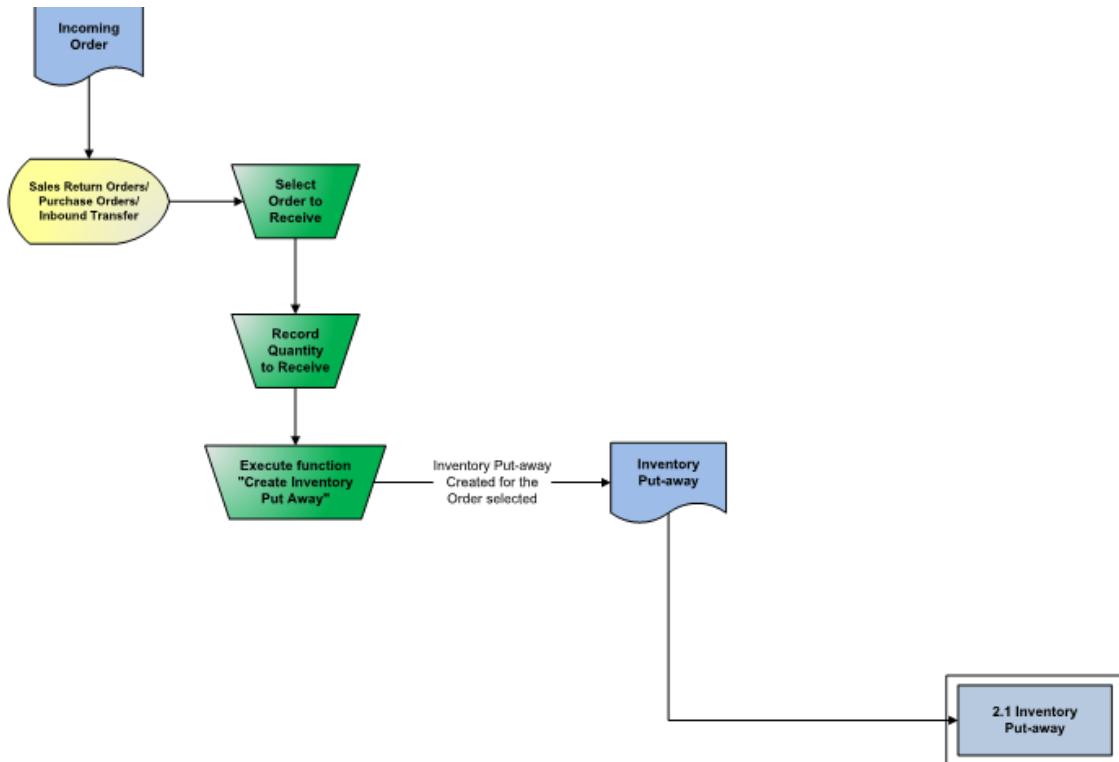
When the items arrive the employee chooses the right return sales order and creates the warehouse receipt. The employee looks whether the item matches the sales return order and if so they are posted to a quarantine area.



2.2 Receiving Goods

2.2.1 Receiving Goods with Warehouse Receipts

The receipt of goods can be posted in the warehouse and / or also directly in purchase orders. It is also possible to use the warehouse only partly, for example one can use only the warehouse receipts, without put-aways.



Receiving orders with Warehouse Management provides new options to define where and how items are received and expedited further in the warehouse process. Prior to receiving, an inbound document must be created and released before the warehouse staff is able to view the order lines. Besides of being a work document, the receipt can also serve as an indication of what is to expect for the warehouse, and thereby allow more efficiency for planning workloads.

The receipt can either be created from an inbound order (i.e. Purchase order, Inbound transfer order) or Sales return order. When a receipt is created, more than one inbound source document can be retrieved. Using the function "Get Source Document..." the employees can register many items arriving from different inbound orders with one receipt.

When items arrive to the warehouse, an employee must handle and register the arrival and insert the exact received amount into the related document. When the warehouse employee posts the receipt, the items become part of inventory available for sale (but not yet ready for picking).

WAREHOUSE RECEIPT

RE000057

[X](#) Reminder: your work date is 1/29/2021 [Use today](#) | [Change to...](#) | [Turn off reminder](#)

Process Print/Send Posting Receipt Navigate Actions Navigate Fewer options

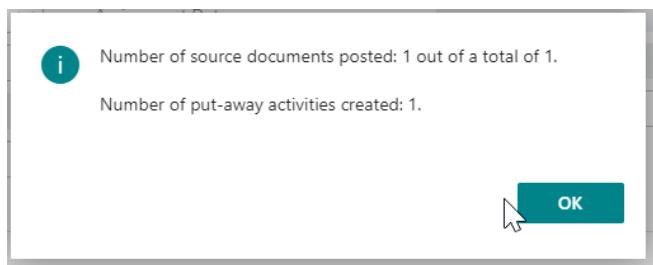
General

No.	RE000057	...	Vendor Shipment No.	ABC123
Location Code	GREEN	...	Assigned User ID	
Zone Code		▼	Assignment Date	
Bin Code		▼	Assignment Time	
Document Status	Partially Received		Sorting Method	None
Posting Date	1/29/2021	Calendar		

[Lines](#) [Manage](#) [Line](#) [Fewer options](#)

Source Document	Source No.	Item No.	Description	Bin Code	Quantity	Qty. to Receive	Qty. to Cross-Dock	Qty. Received	Out
Purchase Or...	106033	1151	Axle Front Wheel		500	0	0	0	
→ Purchase Or...	PO00075	1850	Saddle		100	50	0	50	

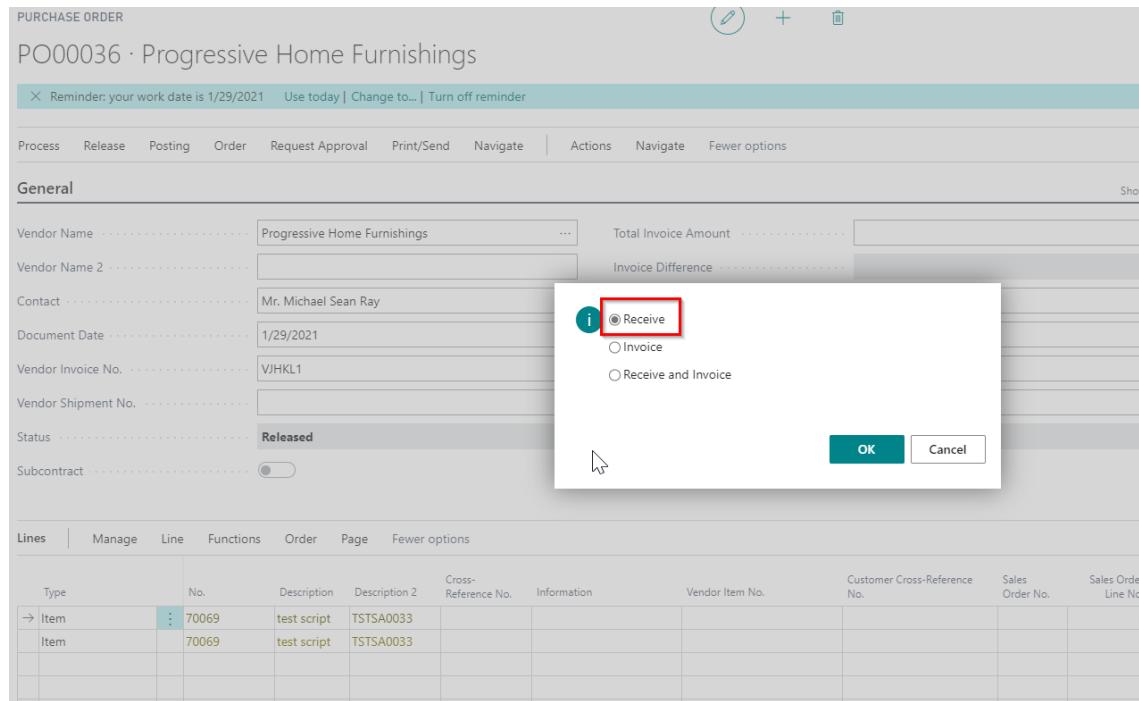
When the receipt document is posted, a put-away document is created. This document is an instruction to the warehouse staff to take the received item and place it in a designated storage place suggested by the program.



Without warehouse there is another possibility (see next paragraph).

2.2.2 Receiving Goods directly in the Purchase Order

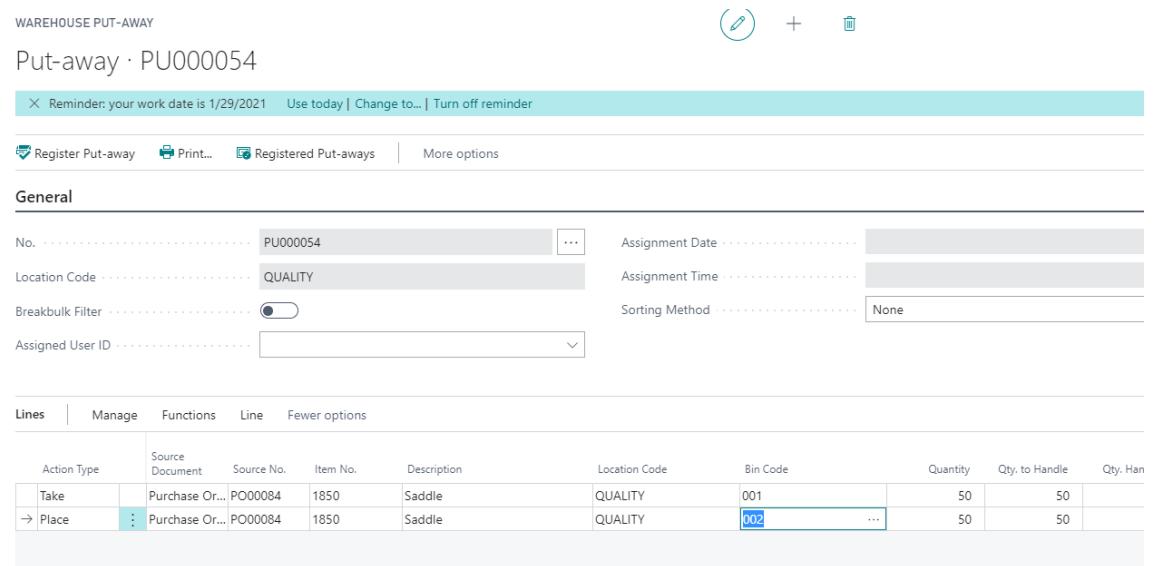
For small companies it is also possible to post the receipt directly in the purchase order (or sales return order). In order to post directly from the purchase order the Vendor Shipment No. has to be entered in the header and the Qty. to Receive has to be entered in the lines. Afterwards the receipt can be posted.



A disadvantage of this approach is that the warehouse employee has access to the purchase order. It could happen that the order is accidentally changed.

2.2.3 Put away Activity

At this point, the suggested zone and bin can be altered if the placement suggested by the program is not convenient.



The put-away document can be registered, and both the receiving and the put-away can be viewed under Posted Receipts and Registered Put-aways. After registering the put-away document, the items are available for picking. When the warehouse has completed these tasks, the source document can be invoiced.

Receipt and Put away in BC fits the processes at the Phoenix Mecano Group.

2.2.4 Quality Control for received items (CORE modification)

In order to see whether the item must be quality controlled when receiving the item from a vendor or customer (return sales order) there should be a field in the item card. If the item must be quality controlled the item is posted manually to a quality control inventory before it is posted to the stock.

Item card FastTab General:

The field "QC required" is inserted for the CORE. The field is from type "bool"

No (No quality control needed)

Yes (Quality control is required)

If the option is yes, then the quality control is done manually.

ITEM CARD

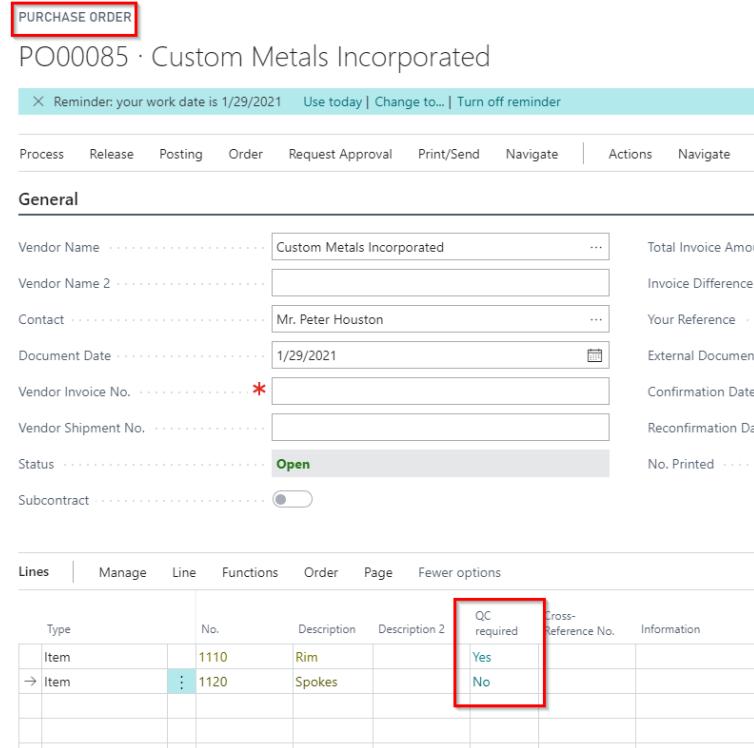
1110 · Rim

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process	Item	History	Special Sales,es & Discounts	Request Approval	Actions	Navigate	Report	Fewer options
Item Show less								
No.	1110	...	UPG 2
Description	Rim		Introduction Date
Description 2			QC required	No
Inventory Value Zero	<input checked="" type="checkbox"/>		RST Risk	No
Blocked	<input checked="" type="checkbox"/>		VVO Risk	Yes
Type	Inventory	▼	Service Item Group
Base Unit of Measure	PCS	▼	Automatic Ext. Text	<input checked="" type="checkbox"/>
Last Date Modified	7/9/2020		Common Item No.
GTIN			Purchasing Code
Item Category Code	...	▼	Cutting	<input checked="" type="checkbox"/>
UPG 1	...	▼						

Warehouse Receipt Line / Purchase Line and Warehouse Shipping Line / Sales Line

The field "QC required" is shown in the relevant lines of purchase orders, the warehouse receipts, sales line and warehouse shipping line.



The screenshot shows the Purchase Order screen for PO00085. The General tab is selected, displaying vendor information like Name and Contact. The Lines grid shows two items: Item 1110 (Rim) and Item 1120 (Spokes). A red box highlights the 'QC required' column in the grid, which contains the values 'Yes' and 'No' respectively.

Type	No.	Description	Description 2	QC required	Gross-Reference No.	Information
Item	1110	Rim		Yes		
→ Item	1120	Spokes		No		

Since some companies work only with locations, others with locations and bin, automatic posting is not customized for the CORE. It is customized locally if needed.

Test case:

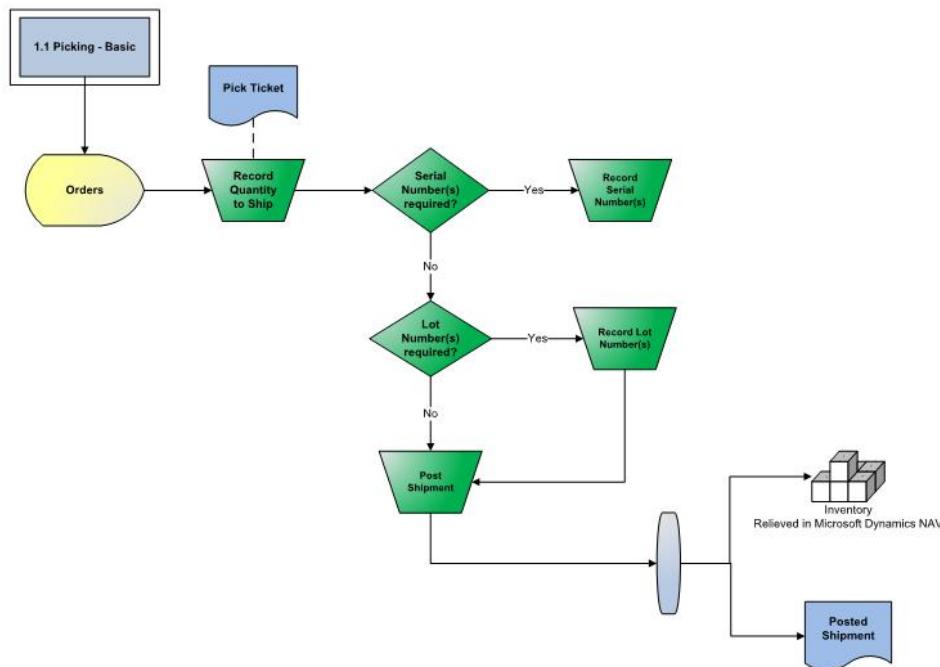
Open the item card and check if field "QC required" exists in the General Tab. Check also if the field has the appropriate options. Open a sales order and check in the item lines, if the field exists and the correct status (sames as in the item card) is shown. Do the same as with the sales order line with the purchase order line, the warehouse receipt line and the warehouse shipment line.

Refere to testscript: TSTPL0043

2.3 Shipping Goods

2.3.1 Shipping Goods with Warehouse Shipments

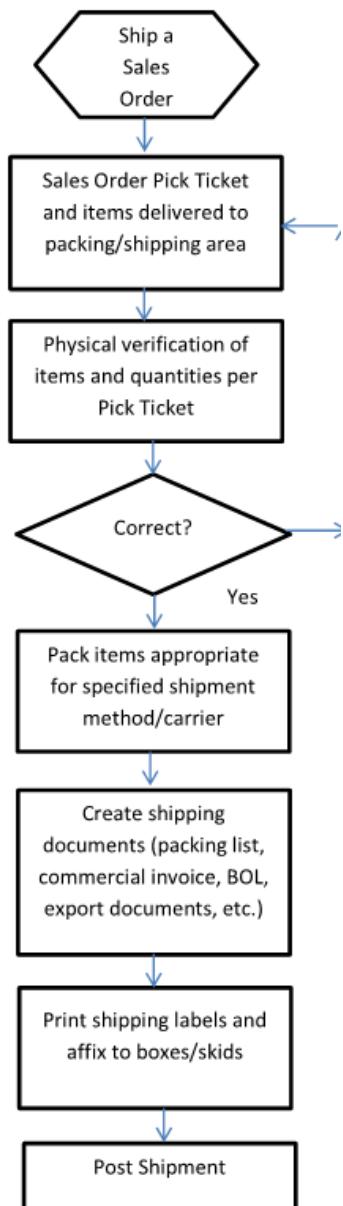
As stated above for incoming goods, the same holds for outgoing goods. Shipments can be posted in the warehouse with or without picking.



However small companies often post the shipping out of the sales order (or purchase return order).

2.3.2 Process Ship a Sales Order

From the warehouse requests (GAP see below) the picking action and the warehouse shipment is created. The good is packed, the documents are created and the shipment is posted.



2.3.3 Process Ship a Purchase Return Order

For purchase return orders the process is the same. Starting point is, as described, the warehouse request. Afterwards the standard BC is used for picking and shipping, The quality control before shipping is done manually and outside of BC.

2.3.4 Warehouse Requests (CORE modification)

Phoenix Mecano needs a list named "Warehouse Requests", where the warehouse can see all shipments that have to be processed during a certain period and whether the

items are available. This list shows only the sales lines. Shipments for purchase return orders and outbound transfers will not be processed out of this list.

With the information in the list the user can go either to the sales order, or to the warehouse shipment in order to proceed. The procedure depends whether the company works with warehouse or not. Because of different procedures in different companies, it was decided that no buttons for creating warehouse shipment and – pick are provided.

A customization was made to provide a page list with the following fields:

- Sales Order No.
- Sell-to Customer No.
- Sell-to Customer Name
- Item No.
- Description
- Location Code
- Quantity
- Outstanding Quantity
- Whs. Outstanding Quantity
- Unit of Measure Code
- Inventory (filtered on the location code of the line)
- Shipment date (of the line)
- Shipping Advice (of the header)
- Shipping Advice (of the line)
- Status (options: ", Ready for Shipment)

With CORE Version 5.00 some additional columns will appear in Warehouse Request Page

- Shipping Agent code
- Shipping Agent Service Code

Furthermore, the users can now use the filter function.

The page shows all released sales order lines together with a status of the related line. When the page is opened, the list is filled and the status is calculated. With a button "Refresh" the list can be recalculated.

To get the lines for a certain period the list can be filtered on the fields "Shipment Date" and "Status".

The status is either empty or "Ready for Shipment" and depends on the field "Shipping Advice" of the sales header in combination with the shipping advice of the sales line.

- If the shipping advice of the header is "Partial", the SO lines are ok to ship independent of one another, based on the shipping advice of the lines. Status shows "Ready for Shipment", if the shipping advice on the line is "Complete" and the inventory is enough to satisfy the demand for the line
- If the shipping advice of the header is "Partial", the SO lines are ok to ship independent of one another based on the shipping advice of the lines. Status shows "Ready for Shipment" if the shipping advice on the line is "Partial" and there is any quantity available against the demand for the line.
- If the shipping advice of the header is "Complete", the status shows "Ready for Shipment" only, if all sales order lines can be satisfied by the inventory. In this case the SO line shipping advice must be "Complete".

Questions:

- How do PM handle a SO if the header advice is "Complete" and the lines are "Partial"?
- Can the programming logic create an error message to indicate this combination is not acceptable?

The page "Warehouse Requests" has been created, where all shipments that have to be processed during a certain period can be seen, whether the items are available. This list shows only the sales lines. Shipments for purchase return orders and outbound transfers will not be processed out of this list.

With the information in the list the user can either go to the sales order, or to the warehouse shipment in order to proceed. The procedure depends whether the company works with warehouse or not. Because of different procedures in different companies, it was decided that no buttons for creating warehouse shipment and – pick are provided.

WAREHOUSE REQUEST

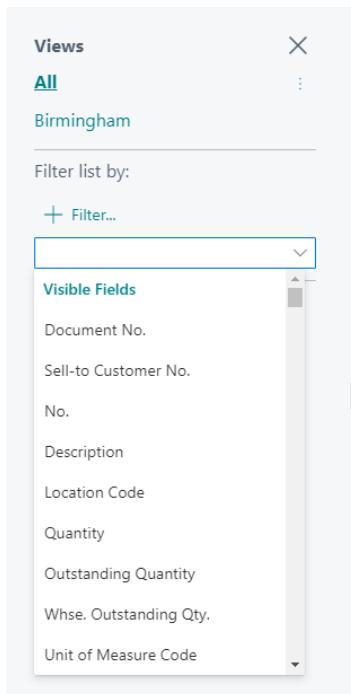
The screenshot shows a list of warehouse requests. The columns include Document No., Sell-to Customer No., Sell-to Customer Name, No., Description, Location Code, Quant..., Outstanding Quantity, Whse. Outstanding Qty., Unit of Measure Code, Inventory, Shipment Date, Shipping Advice (Header), Shipping Advice (Line), Status, Shipping Agent Code, and Shipping Agent Service Code. The list contains several entries for different products like Side Panel, Rim, Saddle, Bicycle, and Socket Front, with various shipping details and statuses.

The page shows all released sales order lines together with a status of the related line. When the page is opened, the list is filled and the status will be calculated. With a button "Recalculate List" the list can be recalculated.

WAREHOUSE REQUEST

The screenshot shows the same Warehouse Request list page as above, but with a red box highlighting the "Recalculate List" button in the top navigation bar. This button is used to refresh the list of sales order lines.

To get the lines for a certain period the list can be filtered on the fields "Shipment Date" and "Status".



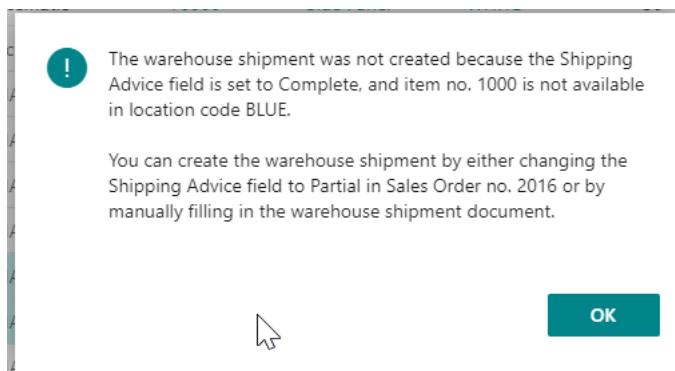
The status is either empty or "Ready for Shipment" and depends on the field "Shipping Advice" of the sales header in combination with the shipping advice of the sales line.

The calculation goes as follows:

If the shipping advice of the header is "Partial", the SO lines are ok to ship independent of one another based on the shipping advice of the lines. Status shows "Ready for Shipment", if the shipping advice on the line is "Complete" and the inventory is enough to satisfy the demand for the line

If the shipping advice of the header is "Partial", the SO lines are ok to ship independent of one another based on the shipping advice of the lines. Status shows "Ready for Shipment" if the shipping advice on the line is "Partial" and there is any quantity available against the demand for the line.

If the shipping advice of the header is "Complete", the status shows "Ready for Shipment" only, if all sales order lines can be satisfied by the inventory. In this case the SO line shipping advice must be "Complete". It cannot be partial. Trying to change it to partial will result in an error upon trying to release the SO.



The first option in the field Status of the Sales Line has been changed from " " to "Not Ready".

2045	70000	Side Panel	BLUE	10	0	—	PCS	-743	8/18/2020	Partial	Partial	Not Ready
2059	1850	Saddle	BLUE	15	15	—	PCS	723	1/29/2021	Partial	Partial	Ready for S...
2061	1850	Saddle	BLUE	50	50	—	PCS	723	1/29/2021	Partial	Partial	Ready for S...
2062	70062	cutted item	BLUE	12	12	—	M	-275,080	1/29/2021	Partial	Partial	Not Ready
2063	70062	cutted item	BLUE	7.28	7.28	—	M	-275,080	1/29/2021	Partial	Partial	Not Ready
2065	70062	cutted item	BLUE	2	2	—	M	-275,080	7/6/2020	Partial	Partial	Not Ready

The calculation of the field Status for the Sales Lines has been amended, so that filtering on the page "Warehouse Request" is possible:

Before filter:

Warehouse Request: All															
Views		Document No.	No.	Description	Location Code	Quant...	Outstanding Quantity	Whse.	Unit of Measure Code	Inventory	Shipment Date	Shipping Advice (Header)	Shipping Advice (Line)	Status	Shipping Agent Code
Birmingham	All	2041	1000	Bicycle	GREEN	0	0	—	PCS	0	8/18/2020	Partial	Partial	Not Ready	
Filter list by:		2041	70000	Side Panel	GREEN	0	0	—	PCS	2,019	8/18/2020	Partial	Partial	Ready for S...	
+ Filter...		2045	1000	Bicycle	BLUE	10	0	—	PCS	-1,073	8/18/2020	Partial	Partial	Not Ready	
		2045	70000	Side Panel	BLUE	10	0	—	PCS	-743	8/18/2020	Partial	Partial	Not Ready	
		2059	1850	Saddle	BLUE	15	15	—	PCS	723	1/29/2021	Partial	Partial	Ready for S...	
		2061	1850	Saddle	BLUE	50	50	—	PCS	723	1/29/2021	Partial	Partial	Ready for S...	
		2062	70062	cutted item	BLUE	12	12	—	M	-275,080	1/29/2021	Partial	Partial	Not Ready	
		2063	70062	cutted item	BLUE	7.28	7.28	—	M	-275,080	1/29/2021	Partial	Partial	Not Ready	
		2065	70062	cutted item	BLUE	2	2	—	M	-275,080	7/6/2020	Partial	Partial	Not Ready	

After filter:

Warehouse Request: Custom filtered															Ship Agent Cod...
Views		Document No.	No.	Description	Location Code	Quant...	Outstanding Quantity	Whse.	Unit of Measure Code	Inventory	Shipment Date	Shipping Advice (Header)	Shipping Advice (Line)	Status	Shipping Agent Code
Birmingham		1036	1850	Saddle	BLUE	10	0	—	PCS	723	1/29/2021	Partial	Partial	Ready for S...	
Filter list by:		1046	1850	Saddle	BLUE	8	8	—	PCS	723	1/29/2021	Partial	Partial	Ready for S...	
+ Filter...		1052	1850	Saddle	BLUE	100	0	—	PCS	723	1/29/2021	Partial	Partial	Ready for S...	
Ready for Shipment		1053	1110	Rim	BLUE	500	0	—	PCS	1,686	1/29/2021	Partial	Partial	Ready for S...	
+ Filter...		1054	1110	Rim	BLUE	100	0	—	PCS	1,686	1/29/2021	Partial	Partial	Ready for S...	
Reset filters		1056	1850	Saddle	BLUE	200	0	—	PCS	723	1/29/2021	Partial	Partial	Ready for S...	
		1057	1850	Saddle	BLUE	111	0	—	PCS	723	1/29/2021	Partial	Partial	Ready for S...	
		1058	70000	Side Panel	CUTTED	100	100	—	PCS	105	1/29/2021	Partial	Partial	Ready for S...	
		1058	1850	Saddle	GREEN	100	100	—	PCS	50	1/29/2021	Partial	Partial	Ready for S...	

It is now possible to create a warehouse shipment directly from the warehouse request page.

WAREHOUSE REQUEST

Warehouse Request: **Custom filtered** | Search Recalculate List Open in Excel **Navigate** | Fewer options

Recalculate List Warehouse Create Whse. Shipment

No.	Description	Location Code	Quant...	Quantity	Outstan...
1036	1850 Saddle	BLUE	10	10	0
Birmingham					

If multiple lines are selected the system will create one warehouse shipment per order and location relation. This means:

One order with 2 locations → 2 warehouse shipments

One order with only one location → 1 warehouse shipment

If multiple lines are selected and for one of the lines a warehouse shipment cannot be created, an error message will occur and no warehouse shipment will be created.

Warehouse Request is not getting filtered anymore after error „Customer is blocked“ and the list gets now recalculated.

Behaviour: If Customer is blocked you will receive an error message like this:

Document No.	Sell-to Customer No.	Sell-to Customer Name	No.	Description	Location Code	Quant...	Outstanding Quantity	Whse. Outstanding Qty.	Unit of Measure Code	Inventory	Shipment Date	Shipping Advice (Header)	Shipping Advice
1036	C00010	ANHA GmbH	1850	Saddle	BLUE	10	0	—	PCS	723	1/29/2021	Partial	Partial
1046	C00020	empa AG	1850	Saddle	BLUE	8	8	—	PCS	723	1/29/2021	Partial	Partial
1052	C00010	ANHA GmbH	1850	Saddle	BLUE	100	0	—	PCS	723	1/29/2021	Partial	Partial
1053	C00020	empa AG	1110	Rim	BLUE	500	0	—	PCS	1,686	1/29/2021	Partial	Partial
1054	20339921	TraxTonic S...					0	—	PCS	1,686	1/29/2021	Partial	Partial
1056	C00030	HTI AG					0	—	PCS	723	1/29/2021	Partial	Partial
1057	C00010	ANHA GmbH					0	—	PCS	723	1/29/2021	Partial	Partial
1058	C00010	ANHA GmbH					100	—	PCS	105	1/29/2021	Partial	Partial
1058	C00010	ANHA GmbH					100	—	PCS	50	1/29/2021	Partial	Partial
1073	C00010	ANHA GmbH	1110	Rim	BLUE	5	5	—	PCS	1,686	1/29/2021	Partial	Partial
1074	C00010	ANHA GmbH	1850	Saddle		5	5	—	PCS	723	1/29/2021	Partial	Partial
2006	C00010	ANHA GmbH	1155	Socket Front	BLUE	0	0	—	PCS	1,200.15	5/19/2020	Partial	Partial

Now: After pushing the OK button the Warehouse Request is still reduced / filtered to the selected lines. However after pushing function "Recalculate List" the list will appear in total.

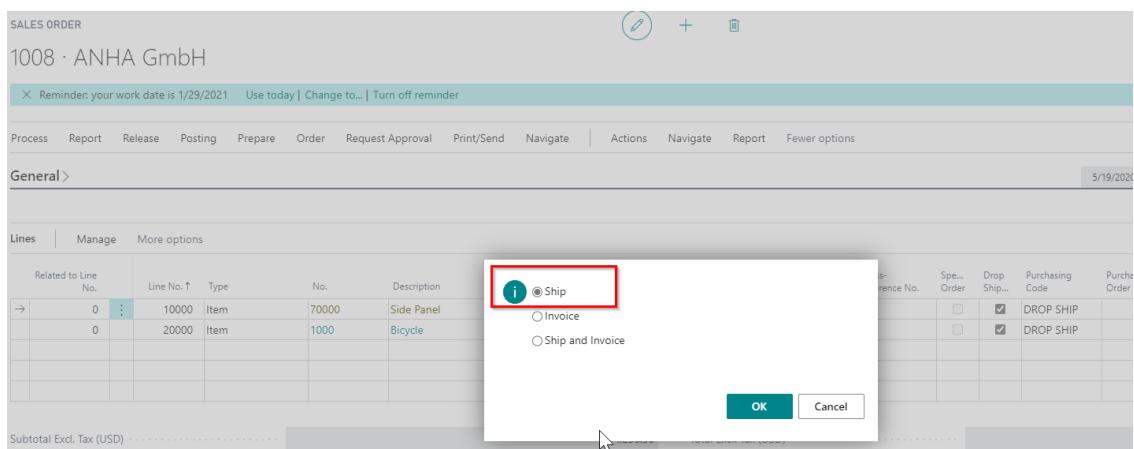
Test case:

Check if the new page can be found in the Department Menu. Run the page. Check if all fields exist and are shown correctly, especially the new field "Status".

Refere to testscripts: TSTPL0044, TSTPL0135, TSTPL0138.

2.3.5 Shipping Goods directly in the Sales Order

In order to post the shipping in the sales order the field Qty. to Ship has to be specified in the lines. Afterwards the shipment can be posted.



Also for shipment the disadvantage of this approach is that the warehouse employee has access to the purchase order and can accidentally change the order.

2.3.6 Shipping the Items in BC

To initiate the shipping process, the source document (sales order, purchase return order and outbound transfer order) must be released, and the request becomes visible to the warehouse staff. The Warehouse Shipment can be created from the source document (i.e. Sales order, Return purchase order or Outbound transfer order) or from the Warehouse shipments with the function "Get Source Documents...").

WAREHOUSE SHIPMENT

SH000033

+

× Remind your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Print/Send Release Posting Shipment | Actions Navigate Fewer options

General

No.	SH000033	...	Posting Date	1/29/2021	<input type="button"/>
Location Code	BLUE	...	Assigned User ID	<input type="button"/>	
Zone Code	<input type="button"/>		Assignment Date	<input type="button"/>	
Bin Code	<input type="button"/>		Assignment Time	<input type="button"/>	
Document Status	<input type="button"/>		Sorting Method	None	
Status	Open				

Lines Manage More options

Source Document	Source No.	Item No.	Description	Quantity	Qty. to Ship	Qty. Shipped	Qty. Outstanding	Due Date	Unit of Measure Code	Qty. per Unit of Measure
→ Sales Order	1076	70000	Side Panel	50	50	0	50	1/29/2021	PCS	1

It is possible to post item or order related resources via the warehouse shipment.

RESOURCE CARD

FREIGHTO · FREIGHT Order

+

× Remind your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Report Resource Navigate Prices Planning | More options

General > Machine PCS

Invoicing

Direct Unit Cost	0.00	Gen. Prod. Posting Group	SERVICES	<input type="button"/>
Indirect Cost %	0.00	VAT Prod. Posting Group	19	<input type="button"/>
Unit Cost	0.00	Default Deferral Template	<input type="button"/>	
Price/Profit Calculation	Profit=Price-Cost	Automatic Ext. Text	<input checked="" type="checkbox"/>	
Profit %	100	IC Partner Purch. G/L Acc. No.	<input type="button"/>	
Unit Price	500.00	Charge Type	Order Related	
Tax Group Code	<input type="button"/>			

When a warehouse shipment is posted and the source of the line is a sales order, BC checks if lines of the type resource are item or order related. If conditions are met (item related: item is fully shipped; order related: order is fully shipped) the specified resource lines are automatically posted as well.

Before post:

SALES ORDER

1077 · ANHA GmbH

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Report

General >

Lines							Manage	More options	
Related to Line	No.	No.	Description	Description 2	Quantity	Qty. to Ship	Quantity Shipped	Cross-Reference No.	S C
	0	1850	Saddle	saddle desc 2	5				
→	0	FREIGHTO	FREIGHT Order		1				

After partial post:

POSTED SALES SHIPMENT

102170 · ANHA GmbH

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Print/Send Shipment Certificate of Supply Actions Navigate Fewer options

General

No.	102170	Requested Delivery Date	
Customer	ANHA GmbH	Promised Delivery Date	
Customer Name 2		Quote No.	
Contact	Andre Haft	Order No.	1077
Posting Date	1/29/2021	Operator Code	AHA

Lines Functions More options

Type	No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Quantity Invoiced	Planned Del. Date
Item	1850	Saddle	saddle desc 2	BLUE	3	PCS		1/2
Resource	FREIGHTO	FREIGHT Order		BLUE		PCS		1/2

SALES ORDER

1077 · ANHA GmbH

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Report Fewer options

General >

Lines Manage More options

Related to Line No.	Line No. ↑	Type	No.	Description	Description 2	Quantity	Qty. to Ship	Quantity Shipped	Cross-Reference No.	Spec. Order
0	10000	Item	1850	Saddle	saddle desc 2	5		3		
→ 0 :	20000	Resource	FREIGHTO	FREIGHT Order			1			
Subtotal Excl. Tax (USD) 5,500.00 Total Excl. Tax (USD) 5,500.00										
Less Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 0.00										

After fully posting:

SALES ORDER

1077 · ANHA GmbH

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate Actions Navigate Report Fewer options

General >

Lines Manage More options

Related to Line No.	Line No. ↑	Type	No.	Description	Description 2	Quantity	Qty. to Ship	Quantity Shipped	Cross-Reference No.
0	10000	Item	1850	Saddle	saddle desc 2	5		5	
0	20000	Resource	FREIGHTO	FREIGHT Order			1	1	

2.3.7 Warehouse Pick Activity

The Warehouse pick activity can be created from the Warehouse shipment using the function "Create Pick...". The pick can be registered and afterwards the shipment can be posted.

As a result of posting, the program deleted the lines from the Warehouse Shipment window and creates both a posted warehouse shipment and a posted sales shipment to register the process.

WAREHOUSE PICK

Pick · PI000028

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Print/Send Pick More options

General

No.	PI000028	...	Assignment Date	...
Location Code	QUALITY		Assignment Time	...
Breakbulk Filter	ON		Sorting Method	None
Assigned User ID		▼		

Lines Manage More options

Action Type	Source Document	Source No.	Item No.	Description	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Out
Take	Sales Order	1079	1850	Saddle	002	25	25	0	
Place	Sales Order	1079	1850	Saddle	001	25	25	0	

WAREHOUSE SHIPMENT

SH000035

X Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Print/Send Release Posting Shipment Actions Navigate Fewer options

Functions ▾ **Posting** ▾ **Print...**

Use Filters to Get Src. Docs...
Get Source Documents...
Autofill Qty. to Ship
Delete Qty. to Ship
Create Pick...

SH000035	...	Posting Date	...
QUALITY	...	Assigned User ID	...
	▼	Assignment Date	...
	▼	Assignment Time	...
		Sorting Method	...

2.3.8 Cross Docking Items

When items are cross-docked, the items are handled through receiving and shipping without ever placing them in storage, thereby expediting the item through the put-away and pick processes and limiting the physical handling of items. Items can be cross-docked for both shipments and for production orders.

When preparing a shipment or pick items for production and using bins, the program will automatically pick the item from a cross-dock bin before considering picking from any other bin.

Comment for testing

When cross docking is tested, it should be tested whether there is a parameterization of BC so that items in stock are consumed first.

2.3.9 Consuming oldest items first

The items can be setup so that "Lot No." is obligatory. When the items are received the lot no. must be inserted. The lot no. can be, for example, the date of receive. In the put away the lot no. and the right bin can be chosen. In the bin table is displayed where the chosen lot is.

Code ↑	Description	Receive	Ship	Put Away	Pick
→ PICK	Pick	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PUT AWAY	Put Away type	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PUTPICK	Put Away and Pick	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QC	No type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RECEIVE	Receive type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SHIP	Ship type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

When posting a shipment a pick is created. In the pick the oldest lot (date = lot no.) and the appropriate bin can be chosen and registered. Doing so the shipment with the oldest item is shipped.

2.3.10 Hide standard fields in standard pages and rename CORE fields

Microsoft delivers with Business Central possibilities to add needed standard fields in a very easiest way. For this reason all additionally added standard fields are hide from

pages and lists. If needed local partners has to made visible these fields with page extensions.

Furthermore all CORE fields are renamed with prefix “PM”. Users will see the field name without the prefix in pages and lists.

3 Add Code to Comment line (CORE modification)

3.1 Add Code to Comment Line

PM needs information which user has add a comment into the comment sheet for different table. For that a CORE field = Initiator lenght 30 in table comment line is created

This field will be filled OnInsert and OnModify triggers with the user name – without domain.

This field and function can be found in the comment lines (see examples):

G / L-Account, Customer, Vendor, Item, Resource , Job ,Resource-Group, Bank-Account, Campaign, Fixed Asset, Insurance, Nonstock Item, IC Partner

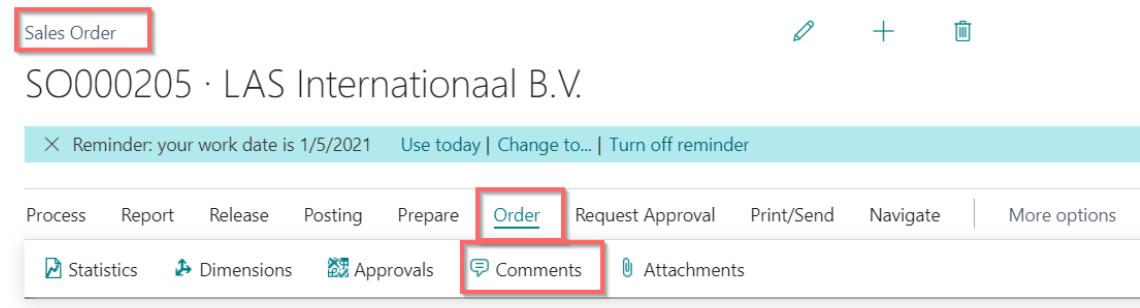
Example:

Customer Card

Date	Comment	Initiator
→ 5/19/2020	: this is a customer comment from Andre sdfg	ANDRE.HAFT
	this is an next comment	ANDRE.HAFT

3.2 Forwarding Initiators within comments

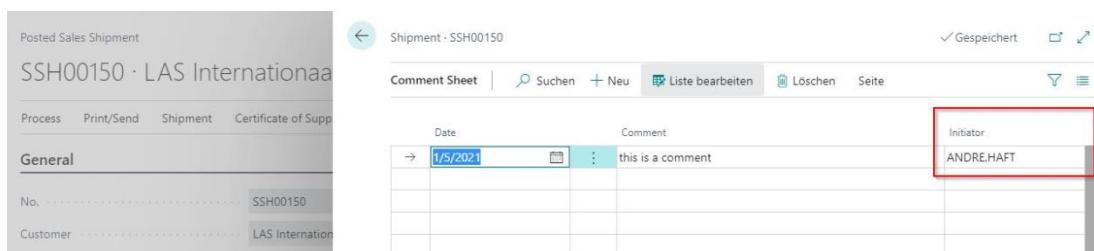
Create a new sales order and add a comment to the sales order.



The screenshot shows the Sales Order screen for document SO000205. The top navigation bar has tabs for Process, Report, Release, Posting, Prepare, **Order**, Request Approval, Print/Send, Navigate, and More options. The **Comments** tab is highlighted with a red box. Below the tabs is a toolbar with Statistics, Dimensions, Approvals, and Comments. The main area shows the order details and a reminder at the top: "Reminder: your work date is 1/5/2021". The Comment Sheet section shows a single comment entry:

Date	Comment	Initiator
→ 1/5/2021	this is a comment	ANDRE.HAFT

Post the sales order (posting shall be done from a different user – not the one who created the comments inside the order). Check on the posted document the comments – especially the field initiator:



The screenshot shows the Posted Sales Shipment screen for document SSH00150. The top navigation bar has tabs for Process, Print/Send, Shipment, and Certificate of Supply. The General section shows No. SSH00150 and Customer LAS Internationaa. The Comment Sheet section shows the same comment entry as the Sales Order screen:

Date	Comment	Initiator
→ 1/5/2021	this is a comment	ANDRE.HAFT

The value of the initiator shall remain the same as inside the order – as this person was the one who created the comment.

