

Special Order POs: Automatic Generation and Distribution (Spec 5287)

Date Released: July 2017

Modules: Navigator Order Entry

Description: New functionality for automating the generation and distribution of Special Orders.

Reason for Change: This enhancement includes two updates for working with Special orders:

- Automatic Generation - Prior to the introduction of this functionality, special orders were generated by manually running menu option PUR 4 - Print Special Order Purchases.
- Automatic Distribution of Special Order POs via ODS

Automatic Generation of Purchase Orders for Special Orders

System Wide Setting - Options for Special Orders

The following options were added.

```
INQUIRY                               System Wide Settings Maintenance

Options for Special Orders

Update Special Order Line to status = Y when Special Order PO is processed.
Update Order Status of Linked Back Order when P.O. Status is Changed? Y (Y/N)
Update Ship Date of Linked Back Order when P.O. ETA Date is Changed? Y (Y/N)

Block Creation of Special Order Purchase Orders for Held Orders. N (Y/N)
Limit Creation of Special Order POs to those added/changed today. N (Y/N)
Set Special Order PO Warehouse to X Customer Order Header Warehouse or
to _ Customer Order Detail Line Warehouse

Enable Auto-creation of Special Order POs during order processing? Y (Y/N)
Auto-distribute special orders via ODS to supplier? N (Y/N)
  Suppress distribution of PO when items have policy code: _ _ _
Update Special Order Line to status = ? when PO is distributed.
```

If the setting **Enable Auto-creation of Special Order POs during order processing** is activated, Special Order POs are automatically created just like POs for regular orders.

The default setting is “N”.

Note: The setting **Allow suppression of special order PO auto-creation**, in the three Navigator menu options, provides a user with the option to suppress individual PO creation via the End-of-Order options.

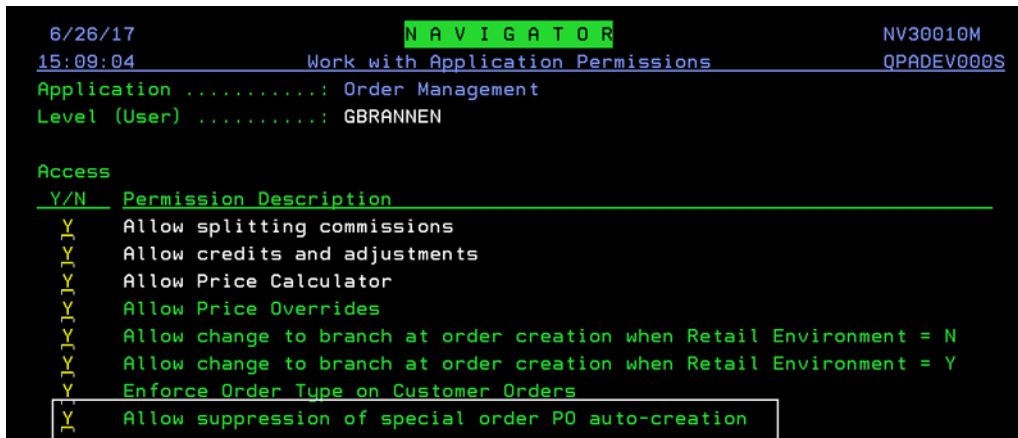
Interactions with other special order settings

- This process respects the SET 3 company setting flag **Allow Special Order POs To Print If On Credit Hold**. If this setting is set to N, automated special order PO creation will take place when the order is released from Credit Hold via Navigator. Releasing from Credit Hold via GS is not supported with the automatic creation of special order PO process.
- The automatic creation of special order PO process does not look at the SET 4 setting **Limit Creation of Special Order POs to those added/changed today**. Automatic special order PO processing occurs regardless of order date.

Navigator Menu (Automatic Generation of Special POs)

The option **Allow suppression of special order PO auto-creation** has been added to all three Navigator Access/Security levels (Nav 1, 2, and 5).

Enter an “A” for Order Management and then activate the setting.

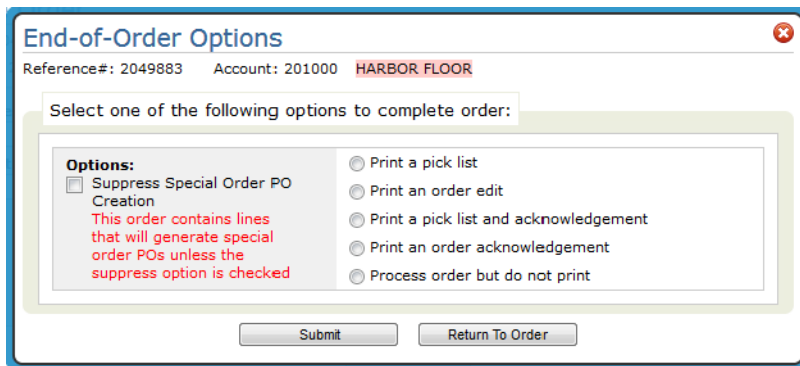


Note: For NAV 2 and NAV 5, you need to enter a “W” to get to the Web Apps.

The default is “N”.

No setting (blank) is the same as an “N”.

If the setting is activated, the option **Suppress Special Order PO Creation** option gets added to the End-of-Order options window.



If the **Suppress Special Order PO Creation** option is checked, the order gets processed, but no PO is created for the order.

If an order has been marked with the suppression flag, in order to generate the special order PO for this order, you will have to access order change for this order, and then during the end-of-order options during processing, remove the Suppress Special Order PO Creation flag.

Automatic Distribution of POs for Special Orders

System Wide Setting - Options for Special Orders

The following options were added.

```
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Options for Special Orders

Update Special Order Line to status = Y when Special Order PO is processed.
Update Order Status of Linked Back Order when P.O. Status is Changed? Y (Y/N)
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Block Creation of Special Order Purchase Orders for Held Orders. N (Y/N)
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Set Special Order PO Warehouse to X Customer Order Header Warehouse or
to _ Customer Order Detail Line Warehouse

Enable Auto-creation of Special Order POs during order processing? Y (Y/N)
Auto-distribute special orders via ODS to supplier? N (Y/N)
  Suppress distribution of PO when items have policy code: _ _ _
Update Special Order Line to status = ? when PO is distributed.
```

Auto-distribute special orders via ODS to supplier activates this functionality.

Use the setting **Suppress distribution of PO when items have policy code** to enter up to three item policy codes that disable automatic distribution. When enabled, if a special order PO is created for an item with one of these policy codes, the email distribution to the supplier will be suppressed.

After special orders are distributed, they are automatically assigned the status entered in the setting **Update Special Order Line to status = when PO is distributed**. This can help group, track and report on special orders.

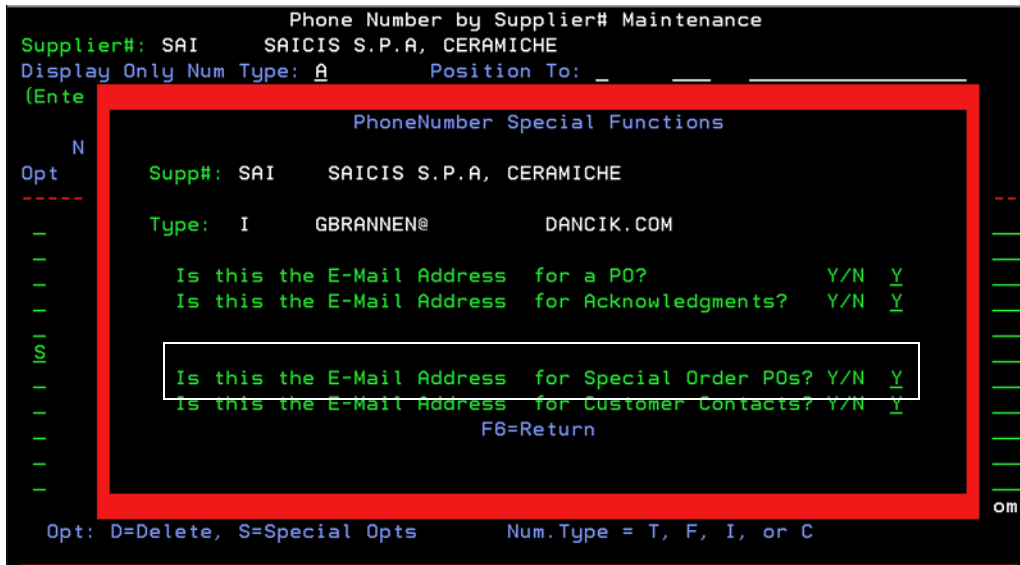
Supplier File

The setting **Is this the Email Address for special order POs** in the Supplier Phone Number file determines where the special PO is distributed.

To get to the Special Functions screen:

- Access the Supplier File
- Press F9 to access the Phone Number Maintenance window.

- Enter an “S” in the Opt field for the contact you want to work with.



Example workflow

Example workflow to generate and distribute a special order PO.

1. Access Navigator Order Management and begin a new order.
2. Enter an item number from a supplier that has a contact set-up to receive an email when a special order is created.

- On the Add Line window, ensure the **Special Order** checkbox is activated.

Add Line ✖

Reference#: 2050742 Account#: 201000 **HARBOR FLOOR**

Item#: SAI10900	Quantity: 2.00	UM: CT
Description: GENOVA 5" FLORENCE 1/2"X34.45SFXR L HICKORY	Lot: S	Warehouse: RAL
<input checked="" type="checkbox"/> Special Order:	Price: 4.290	Serial#: <input type="text"/>
Supplier#: SAI	Extended Price: <input type="text"/>	Location: <input type="text"/>
Ship Via: <input type="text"/>	Price List:	Restriction Code: <input type="text"/>
FOB: <input type="text"/>	Price Method:	Received?: B
Direct Ship: <input type="radio"/> Yes <input checked="" type="radio"/> No	Cost: .000	Restock%: <input type="text"/>
	Extended Cost:	Crdt/Cmsn Code: <input type="text"/>
		Ship Date: 07/26/17

Messages: No Broken. Comments: NO BROKEN CARTONS

Inventory **Message Lines** Inventory Analysis

Serial#	Shade	Ware	Quantity Available	UM	Status	Location	Quantity	UM	Other Ref#	Lot	Quantity Onhand	Quantity Allocate
800108A	K	RAL	0.10	CT		C20	<input type="text"/>	<input type="text"/>			0.10	
ABCDEF3	ZZZZ	RAL	0.17	CT	+	K11	<input type="text"/>	<input type="text"/>			241.37	
080200		RAL	1.31	CT		FNYC	<input type="text"/>	<input type="text"/>			2.60	
MAY1413V2	BL02	RAL	6.00	CT		RK2	<input type="text"/>	<input type="text"/>	12345678901234567890		7.00	
MAY1413V3	BL03	RAL	8.21	CT		RK1	<input type="text"/>	<input type="text"/>	ABCDEFGHIJKLMNQRST		30.00	
000003	BLUE	RAL	10.00	CT		BB22	<input type="text"/>	<input type="text"/>	JAMES JOHNSON		30.00	
ABC		RAL	8.00	CT			<input type="text"/>	<input type="text"/>			-2.00	
ABCDEFG		RAL	1.92	CT		K10	<input type="text"/>	<input type="text"/>			12.73	
ABC123		RAL	0.50	CT	Q	B98	<input type="text"/>	<input type="text"/>			5.50	
WGB1234	RED1	RAL	20.00	CT		RK1	<input type="text"/>	<input type="text"/>			40.00	

Sort By: Bin Location UM: CT Refresh Future show/hide totals Run ISO

Add Line

- Click **Add Line** twice to add the item to the order.
- Click **Complete Order**.
- If the preview window comes up, click Continue to proceed to the Complete Order window.
- Enter the payment information and click Continue.
- On the End-of-Order Options window, click **Process order but do not print**.

At this point, the Special Order PO is emailed to the Supplier Contact set-up in the Supplier File.

PURCHASE ORDER		DANCIK INTERNATIONAL		RAL		7/24/17 15:57		PAGE 1	
* Special Order *		333 COUNTRY CLUB DRIVE		00000		PURCHASE ORDER#		707154-RAL	
		SUITE 250							
TO: SAI #1			SHIP TO:			BILL TO:			
SAICIS S.P.A, CERAMICHE			DANCIK INTL / RALEIGH KCS			WYETH FLOORING			
VIA GIARDINI, 32,44,46			2000 CENTER GREEN CT.			952 MAIN STREET			
AA			SUITE 250 - WAREHOUSE FILE			PBEKSKILL NC 27513-1234			
SPEZZANO MO 41040 ITALY			RALEIGH NC 27513						
ITALY									
ORDER DT	DATE REQ	SHIP VIA	F.O.B.	ACCOUNT#	CUST P.O.#/JOB	WAREHSE/TERMS	ORDER REFERENCES		
7/24/17	7/26/17	OUR TRUCK	FRT COLLECT	200001	WGB123	RAL 3.00% 15	SAI/2050742/S GB		
		BTA: 7/26/17	HARBOR FLOOR				BC/RAL/ /		
LINE#	ITEM#	DESCRIPTION			QTY ORD	U/M	UNIT PRICE	PRICE	
0010	L654408C	GENOVA 5" FLORENCE HICKORY			2.00	CT	3.050 SF	61.00	
		1/2"X34.45SFXRL							
							TOTAL PRICE..\$	61.00	
Order Weight:	80 LBS	Supp Fax:	53-684-3921						
		Supp Phone#:							
Please include our P.O.# on all billing.					Authorized By				

Note: A an entry is made in the order's notepad denoting that a special order PO was distributed.