DS0290

Date Rolldown & PO Inquiry

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Problem Definition

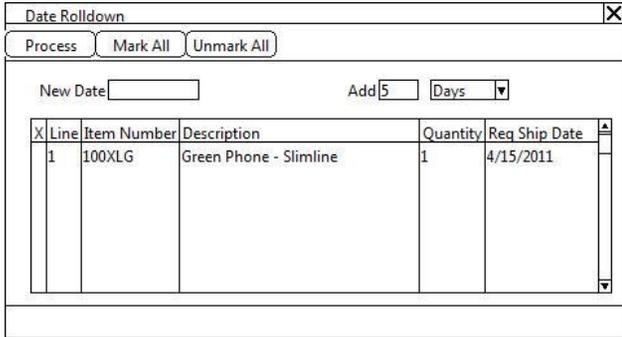| Problem Definition	CCDA
Changing the Requested Ship Date (RSD) in Sales Transaction Entry, and Current Promise Date (CPD) in Purchase Order Entry, can be tedious if the documents have multiple lines. There is no ability to view the RSD/CPD for all lines at the same time, and the available ability to roll-down a new date automatically applies to ALL lines without ability to only roll-down to some lines. ACMECO needs the ability to view and edit the RSD/CPD for all lines at the same time, to set a new date and selectively roll-down to some or all of the lines. A second requirement is to be able to perform a purchase receipts history inquiry directly from the PO Line. They need to frequently look up the order history of a part for cost estimation, and it is time consuming to have to manually enter the parameters into the Purchase Order Processing Item Inquiry and/or Inventory Purchase Receipts Inquiry windows. The desired window would open automatically from a selected PO Line, and display: • Vendor ID • Vendor Name • Item Number • Item Description • Receipt Date • Receipt Quantity • Unit Price • Linked MO Number (if present) • MO Item Number (if present)	

Solution Overview

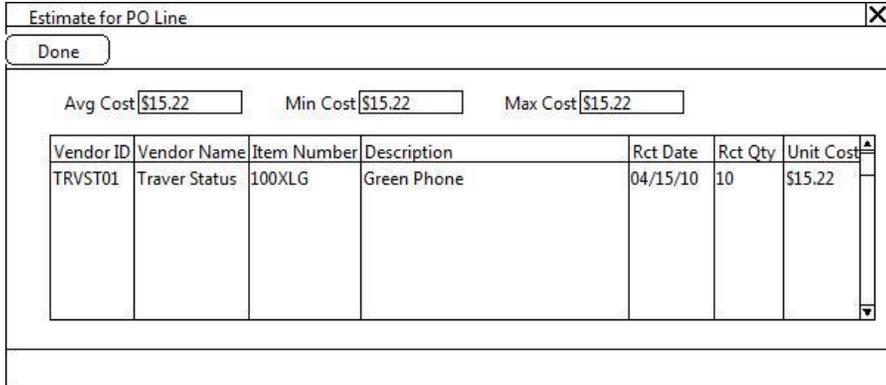| Solution Overview	CCDA
A new window, Date Rolldown, will be added to Sales Transaction Entry and Purchase Order Entry. It will display all of the lines from a selected document (SOP or POP), provide the ability to manually edit each line, or set a new date and rolldown to all lines or to mark specific lines to which the new date will be applied. A new window, Estimate For PO Line, will be added to the PO Entry window. After entering an Item Number on the PO Line, the user will be able to open the new inquiry window via the Additional menu.	

Design Features

Date Rolldown	CCDA

The same window will be used for both Sales and Purchasing.
Navigation: Additional >> Date Rolldown

Field	Function
New Date	The New Date will be rolled-down to Marked lines
Add / Days	Add / Days. The value (shown as 5 above) can be positive or negative. The drop-down box will have two options: Days or Months. As shown above, 5-days would be added to the Req. Ship Date of each line. This provides the ability to move each Req Ship Date on the document forward/backward by the same amount, while keeping the date different on each line.
	SCROLLING WINDOW
X	A checkbox for marking/unmarking the line (editable)
Line	Displays Line Number
Item Number	Displays Item Number
Description	Displays Item Description

Quantity	Displays Quantity
Req. Ship Date / Curr. Prom. Date	The Date field is editable. The user can manually change the Date by editing this field. Changes are immediately applied to the SOP or POP document.
	BUTTONS
Process	Applies the New Date or Add-Days value to each selected line. The user will be prompted to confirm they are ready to apply the change.
Mark All / Unmark All	Marks/Unmarks the checkbox on all of the lines.

Changes made directly to the Date on each line is immediately applied to the document. When the Process button is clicked, the change will be applied to all marked lines. There is no ability to automatically "un-do" either change.

If lines are linked to Manufacturing Orders, or have SOP-POP links, the lines for the selected document will be updated but the change will not be rolled-down to the linked document. In other words, if a SOP Line is updated, the new RSD will not be applied to the Required Date on the PO.

Estimate for PO Line	CCDA

Navigation: Additional >> Estimate for PO Line

When the window opens it will pull the Item Number from the selected PO Line, then display all purchase receipt lines for that same Item Number. If the PO Line displays "Item Number", the search will be by Item Number. If the PO Line displays "Vendor Item", the search will be by Vendor Item Number.

Field	Function
Avg Cost	Displays the average unit cost of all receipts for the item
Min Cost	Displays the minimum unit cost of all receipts for the item
Max Cost	Displays the maximum unit cost of all receipts for the item
	SCROLLING WINDOW – Line 1
	As shown above
	SCROLLING WINDOW - Line 2 (not shown)

	Expanding the window to show 2 lines will display the following fields: Vendor Item, Vendor Item Description, MO Number, MO Item Number.	