



DS0704

MFG and RMA Item Revision Levels



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Problem Definition

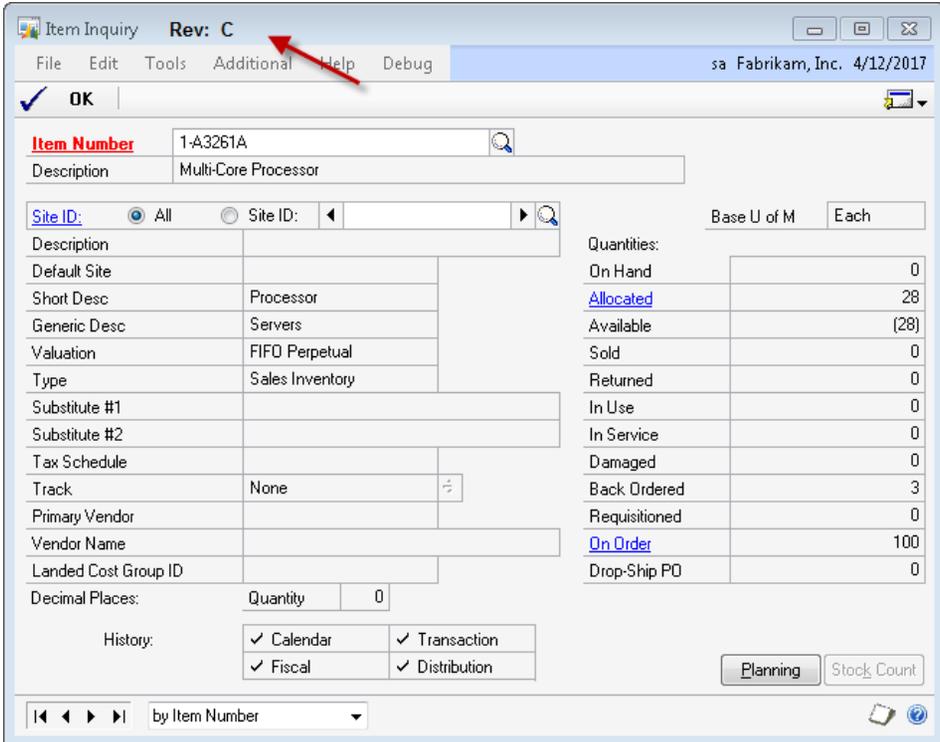
<i>Problem Definition</i>	CCDA
<p>ACME Co. plans to purchase two WilloWare products:</p> <ul style="list-style-type: none">• Purchase Order Revision Levels• Sales Order Revision Levels <p>In addition to the functionality that these two products provide, ACME requires additional features:</p> <ol style="list-style-type: none">1. ACME would like the current Item Revision Level to be displayed on the Item Inquiry window.2. ACME requires the ability to track Item Revision Levels on Manufacturing Orders and Field Service RMA's. They have viewed a demo of the WilloWare product "Purchase Order Revision Levels" and would like an enhancement to function similarly within these 2 modules. <p><u>Manufacturing Orders</u> The enhancement should track the Revision Level of the Item at the time it was manufactured, support tracking a history of revision level changes per MO and support manufacturing the same part at different Revision Levels.</p> <p>The Revision Level should be printable on GP Manufacturing Order Reports.</p> <p><u>RMA's</u> The enhancement should track the Revision Level of the Item at the time it was returned, support tracking a history of revision level changes per RMA Line and support returning the same part at different Revision Levels.</p> <p>The Revision Level should be printable on GP RMA Reports.</p>	



Solution Overview

<i>Solution Overview</i>	CCDA
<p>The solution requires the following:</p> <ol style="list-style-type: none">1. Purchasing Purchase Order Revision Levels separately.2. Purchasing Sales Order Revision Levels separately.3. Purchasing the solution outlined in this design specification DS0704.	

Design Features

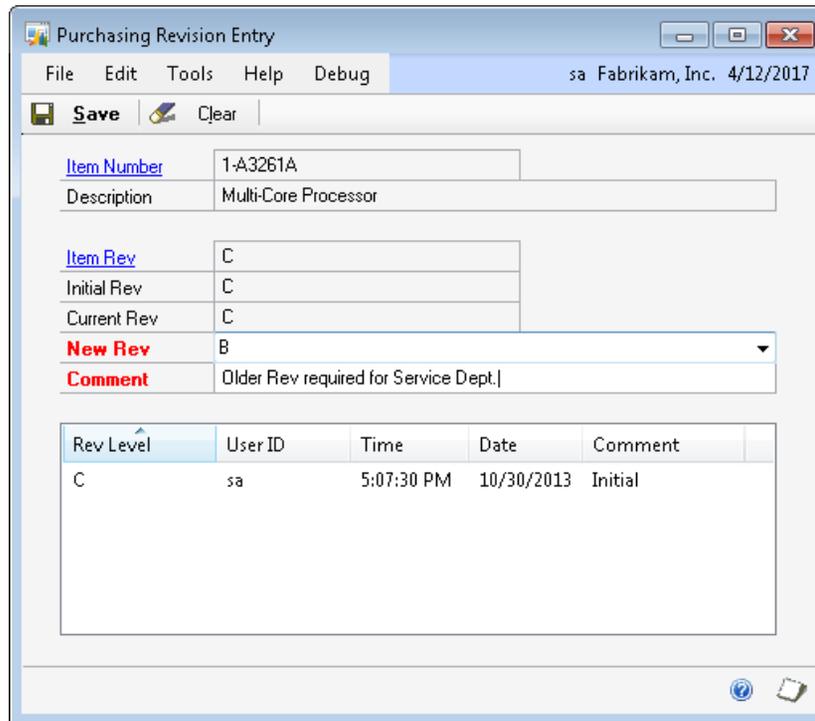
<i>Item Inquiry</i>	CCDA																										
<p>Navigation: Inquiry→Inventory→Item Inquiry</p> <p>The Item Inquiry window will display the current Item Revision Level from the Item Engineering Data Card in the Title Bar of the window. This will appear similar to the example below highlighted by the red arrow.</p>  <p>The screenshot shows the 'Item Inquiry' window with the title bar containing 'Item Inquiry Rev: C'. A red arrow points to 'Rev: C'. The window includes a menu bar (File, Edit, Tools, Additional, Help, Debug), a toolbar with 'OK', and a search field. The main area displays item details for '1-A3261A' (Multi-Core Processor) and a 'Quantities' table.</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <caption>Quantities</caption> <thead> <tr> <th>Quantity Type</th> <th>Value</th> </tr> </thead> <tbody> <tr><td>On Hand</td><td>0</td></tr> <tr><td>Allocated</td><td>28</td></tr> <tr><td>Available</td><td>(28)</td></tr> <tr><td>Sold</td><td>0</td></tr> <tr><td>Returned</td><td>0</td></tr> <tr><td>In Use</td><td>0</td></tr> <tr><td>In Service</td><td>0</td></tr> <tr><td>Damaged</td><td>0</td></tr> <tr><td>Back Ordered</td><td>3</td></tr> <tr><td>Requisitioned</td><td>0</td></tr> <tr><td>On Order</td><td>100</td></tr> <tr><td>Drop-Ship PO</td><td>0</td></tr> </tbody> </table>	Quantity Type	Value	On Hand	0	Allocated	28	Available	(28)	Sold	0	Returned	0	In Use	0	In Service	0	Damaged	0	Back Ordered	3	Requisitioned	0	On Order	100	Drop-Ship PO	0	
Quantity Type	Value																										
On Hand	0																										
Allocated	28																										
Available	(28)																										
Sold	0																										
Returned	0																										
In Use	0																										
In Service	0																										
Damaged	0																										
Back Ordered	3																										
Requisitioned	0																										
On Order	100																										
Drop-Ship PO	0																										

Manufacturing Order Entry

CCDA

Navigation: Transactions→Manufacturing→Manufacturing Orders→Entry→Additional→MO Revision Entry

The screen shot below is of the Purchasing Revision Entry window. ACME would like an identical window to be accessible from the Manufacturing Order Entry window. The MO Revision Entry window should allow entering “Revisions on the Fly.” The user should be alerted to the condition and then allowed to continue.



The screenshot shows a window titled "Purchasing Revision Entry" with a menu bar (File, Edit, Tools, Help, Debug) and a status bar (sa Fabrikam, Inc. 4/12/2017). The window contains the following fields:

- Item Number:** 1-A3261A
- Description:** Multi-Core Processor
- Item Rev:** C
- Initial Rev:** C
- Current Rev:** C
- New Rev:** B
- Comment:** Older Rev required for Service Dept.]

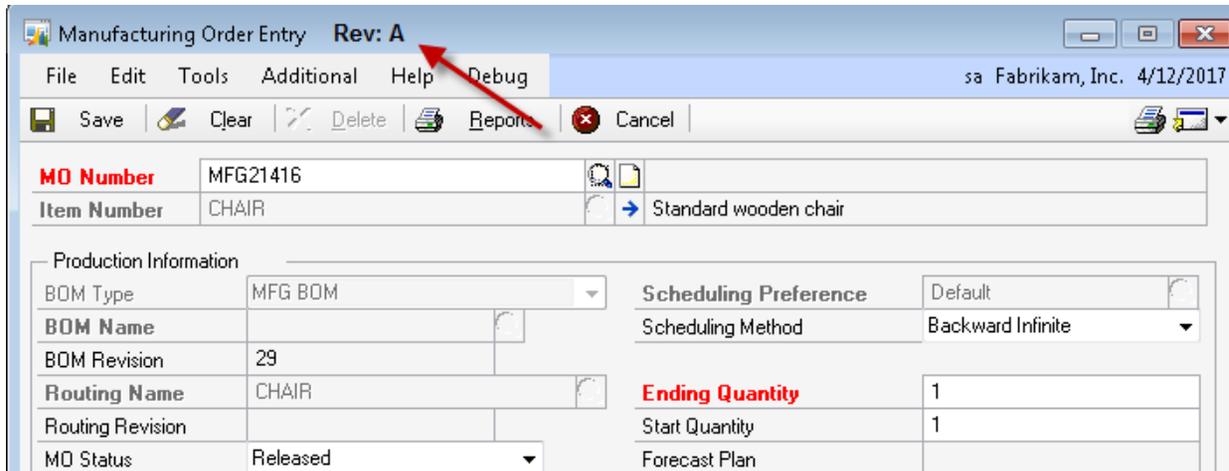
Below the fields is a table showing revision history:

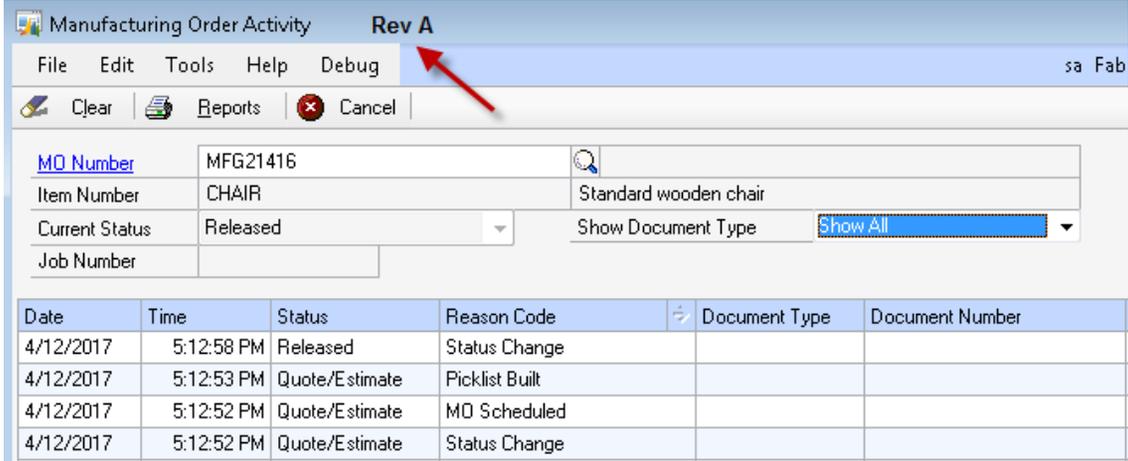
Rev Level	User ID	Time	Date	Comment
C	sa	5:07:30 PM	10/30/2013	Initial

Please Note:

1. The selection of the Revision Level on the MO Entry window will have NO impact on the MO's BOM Revision or Pick List.
2. The Item Revision Level may be updated until the MO is at status CLOSED.

In addition to allowing the user to select the Revision Level, the selected Revision Level should also display in the Title Bar of the Manufacturing Order Entry window. (The user does not need to open the MO Revision Entry window to select the current Revision. The current Revision will default if no Revision is selected. This matches the functionality provided in the WillowWare product "Purchase Order Revision Levels.)



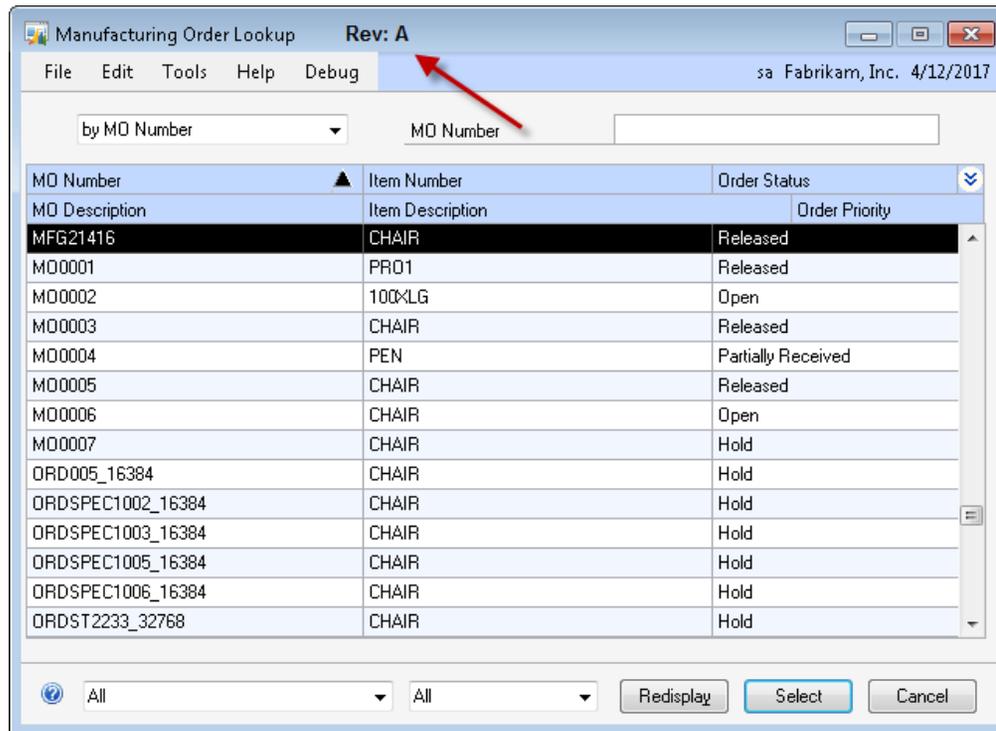
Manufacturing Order Activity	CCDA																														
<p>Navigation: Inquiry→Manufacturing→Manufacturing Orders→Entry→MO Activity</p> <p>The Manufacturing Order Activity window will display the Item Revision Level, which was selected during Manufacturing Order Entry, in the Title Bar of the window. This will appear similar to the example below highlighted by the red arrow.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">  <p>The screenshot shows a software window titled 'Manufacturing Order Activity' with a subtitle 'Rev A'. A red arrow points to the 'Rev A' text. The window has a menu bar with 'File', 'Edit', 'Tools', 'Help', and 'Debug'. Below the menu bar is a toolbar with 'Clear', 'Reports', and 'Cancel' buttons. The main area contains a form with fields for 'MO Number' (MFG21416), 'Item Number' (CHAIR), 'Current Status' (Released), and 'Job Number'. There is also a search icon and a 'Show Document Type' dropdown menu set to 'Show All'. Below the form is a table with columns: Date, Time, Status, Reason Code, Document Type, and Document Number. The table contains four rows of activity data.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr style="background-color: #e1eef6;"> <th>Date</th> <th>Time</th> <th>Status</th> <th>Reason Code</th> <th>Document Type</th> <th>Document Number</th> </tr> </thead> <tbody> <tr> <td>4/12/2017</td> <td>5:12:58 PM</td> <td>Released</td> <td>Status Change</td> <td></td> <td></td> </tr> <tr> <td>4/12/2017</td> <td>5:12:53 PM</td> <td>Quote/Estimate</td> <td>Picklist Built</td> <td></td> <td></td> </tr> <tr> <td>4/12/2017</td> <td>5:12:52 PM</td> <td>Quote/Estimate</td> <td>MO Scheduled</td> <td></td> <td></td> </tr> <tr> <td>4/12/2017</td> <td>5:12:52 PM</td> <td>Quote/Estimate</td> <td>Status Change</td> <td></td> <td></td> </tr> </tbody> </table> </div>	Date	Time	Status	Reason Code	Document Type	Document Number	4/12/2017	5:12:58 PM	Released	Status Change			4/12/2017	5:12:53 PM	Quote/Estimate	Picklist Built			4/12/2017	5:12:52 PM	Quote/Estimate	MO Scheduled			4/12/2017	5:12:52 PM	Quote/Estimate	Status Change			
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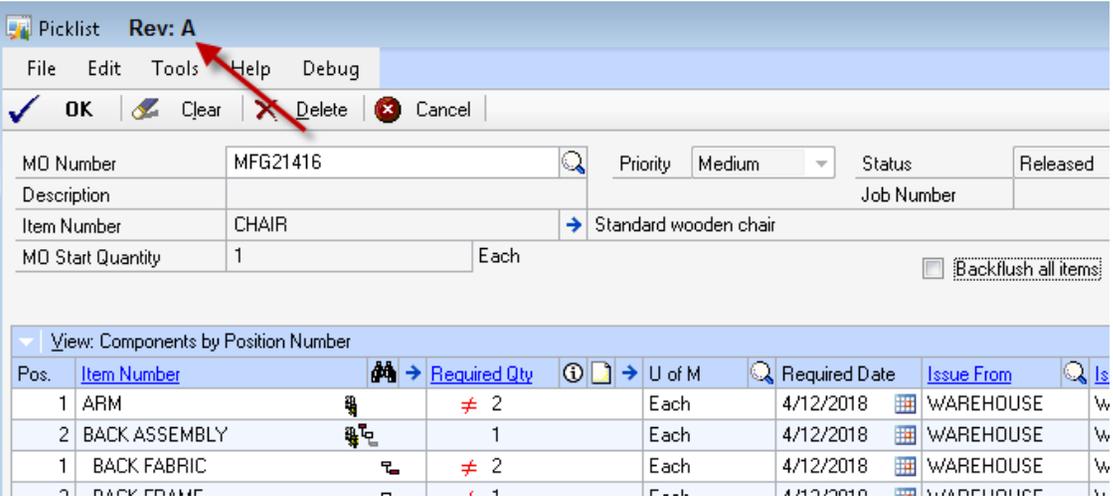
Manufacturing Order Lookup

CCDA

Navigation: Any Manufacturing Order Lookup

The Manufacturing Order Lookup window will display the Item Revision Level, which was selected during Manufacturing Order Entry, in the Title Bar of the window when a MO Number is selected from the scrolling window. This will appear similar to the example below highlighted by the red arrow.



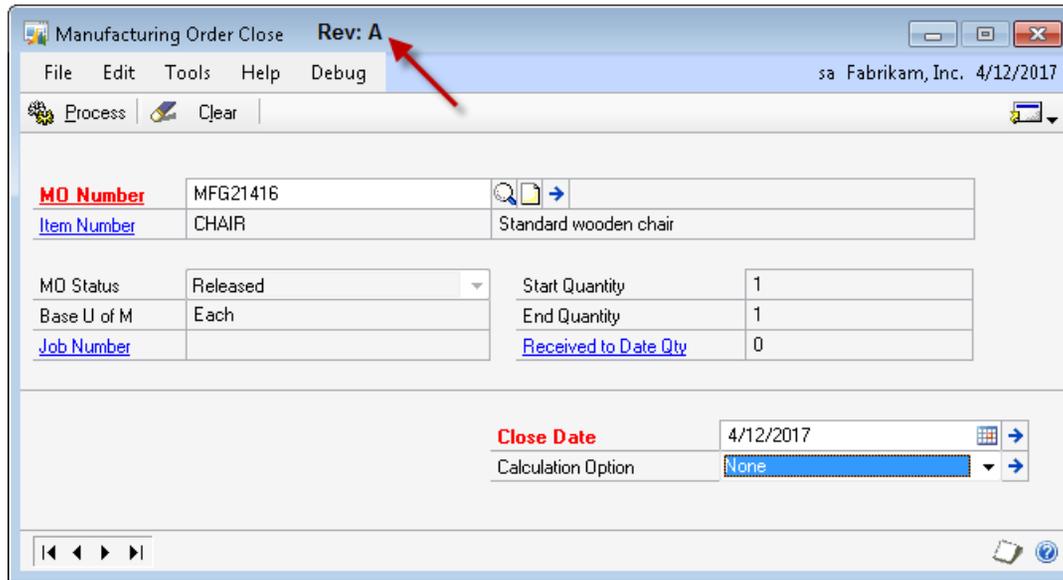
Picklist	CCDA																														
<p>Navigation: Transactions→Manufacturing→Manufacturing Orders→Picklist</p> <p>The Picklist window will display the Item Revision Level, which was selected during Manufacturing Order Entry, in the Title Bar of the window. This will appear similar to the example below highlighted by the red arrow.</p>  <p>The screenshot shows a software window titled "Picklist Rev: A". The title bar includes "Rev: A" which is highlighted by a red arrow. The window has a menu bar with "File", "Edit", "Tools", "Help", and "Debug". Below the menu bar are buttons for "OK", "Clear", "Delete", and "Cancel". The main area contains fields for "MD Number" (MFG21416), "Priority" (Medium), "Status" (Released), "Description", "Item Number" (CHAIR), and "MD Start Quantity" (1). A table below shows components with columns for "Pos.", "Item Number", "Required Qty", "U of M", "Required Date", and "Issue From".</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th>Pos.</th> <th>Item Number</th> <th>Required Qty</th> <th>U of M</th> <th>Required Date</th> <th>Issue From</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>ARM</td> <td>2</td> <td>Each</td> <td>4/12/2018</td> <td>WAREHOUSE</td> </tr> <tr> <td>2</td> <td>BACK ASSEMBLY</td> <td>1</td> <td>Each</td> <td>4/12/2018</td> <td>WAREHOUSE</td> </tr> <tr> <td>1</td> <td>BACK FABRIC</td> <td>2</td> <td>Each</td> <td>4/12/2018</td> <td>WAREHOUSE</td> </tr> <tr> <td>2</td> <td>BACK FRAME</td> <td>1</td> <td>Each</td> <td>4/12/2018</td> <td>WAREHOUSE</td> </tr> </tbody> </table>	Pos.	Item Number	Required Qty	U of M	Required Date	Issue From	1	ARM	2	Each	4/12/2018	WAREHOUSE	2	BACK ASSEMBLY	1	Each	4/12/2018	WAREHOUSE	1	BACK FABRIC	2	Each	4/12/2018	WAREHOUSE	2	BACK FRAME	1	Each	4/12/2018	WAREHOUSE	
Pos.	Item Number	Required Qty	U of M	Required Date	Issue From																										
1	ARM	2	Each	4/12/2018	WAREHOUSE																										
2	BACK ASSEMBLY	1	Each	4/12/2018	WAREHOUSE																										
1	BACK FABRIC	2	Each	4/12/2018	WAREHOUSE																										
2	BACK FRAME	1	Each	4/12/2018	WAREHOUSE																										

Manufacturing Order Close

CCDA

Navigation: Transactions→Manufacturing→Manufacturing Orders→MO Close

The Manufacturing Order Close window will display the Item Revision Level, which was selected during Manufacturing Order Entry, in the Title Bar of the window. This will appear similar to the example below highlighted by the red arrow.



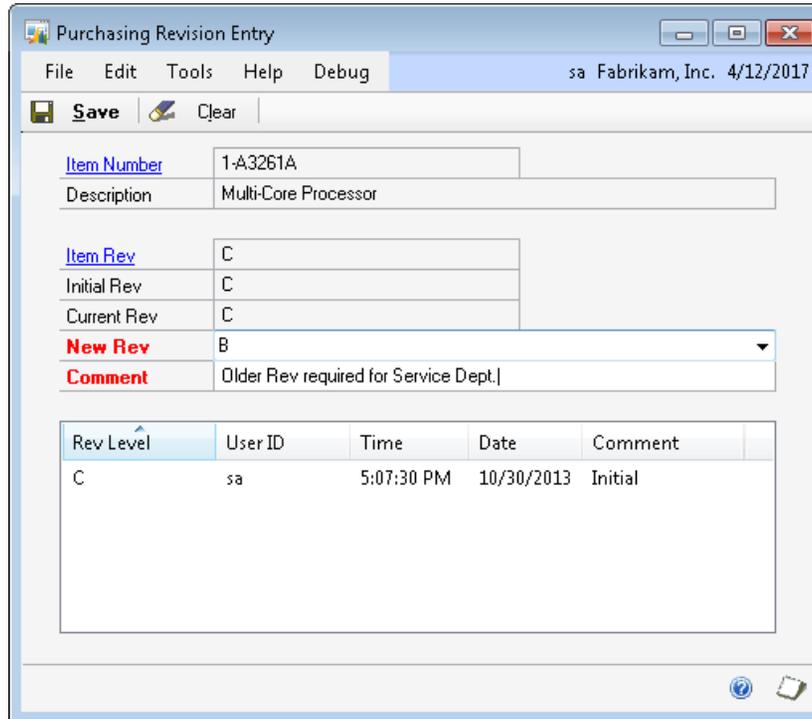
Manufacturing Order Close		Rev: A	
File	Edit	Tools	Help
Process		Clear	
MO Number	MFG21416		
Item Number	CHAIR	Standard wooden chair	
MO Status	Released	Start Quantity	1
Base U of M	Each	End Quantity	1
Job Number		Received to Date Qty	0
Close Date		4/12/2017	
Calculation Option		None	

RMA Entry/Update

CCDA

Navigation: Transactions→Field Service→Returns Management→RMA Entry/Update→Additional→RMA Revision Entry

The screen shot below is of the Purchasing Revision Entry window. ACME would like an identical window to be accessible from the RMA Entry/Update window when a RMA line item is selected. The RMA Revision Entry window should allow entering “Revisions on the Fly.” The user should be alerted to the condition and then allowed to continue.



The screenshot shows a window titled "Purchasing Revision Entry" with a menu bar (File, Edit, Tools, Help, Debug) and a status bar (sa Fabrikam, Inc. 4/12/2017). Below the menu bar are "Save" and "Clear" buttons. The form contains the following fields:

- Item Number:** 1-A3261A
- Description:** Multi-Core Processor
- Item Rev:** C
- Initial Rev:** C
- Current Rev:** C
- New Rev:** B (dropdown menu)
- Comment:** Older Rev required for Service Dept. |

At the bottom, there is a table with the following data:

Rev Level	User ID	Time	Date	Comment
C	sa	5:07:30 PM	10/30/2013	Initial

Please Note:

1. The Item Revision Level may be updated until the RMA is at status CLOSED.

In addition to allowing the user to select the Revision Level, the selected Revision Level should also display in the Title Bar of the RMA Entry/Update window. (The user does not need to open the RMA Revision Entry window to select the current Revision. The current Revision will default if no Revision is selected. This matches the functionality provided in the WillowWare product "Purchase Order Revision Levels.")

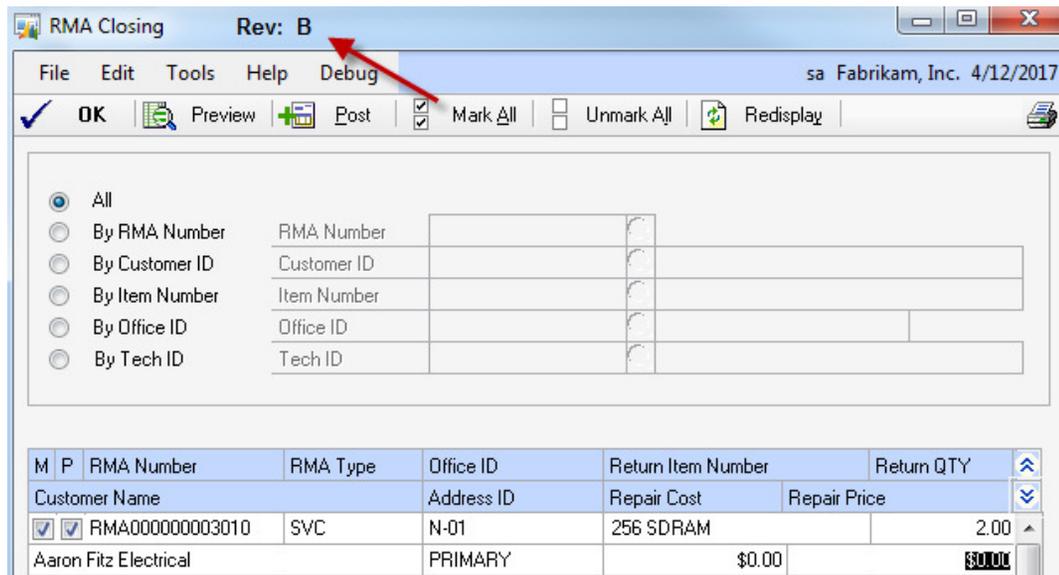
The screenshot shows a software window titled "RMA Entry/Update" with a subtitle "Rev: D". A red arrow points to the "Rev: D" text in the title bar. The window contains a menu bar (File, Edit, Tools, View, Additional, Help, Debug) and a toolbar with icons for New, Save, Clear, Delete, Copy, Ready Close, and Void. The main area is divided into two columns of fields. The left column includes RMA Number (RMA000000003010), RMA Type (SVC), RMA Status (10), RMA Reason Code, Customer ID (AARONFIT0001), Name (Aaron Fitz Electrical), Contact (Bob Fitz), and Address ID (PRIMARY). The right column includes Origin (None), Office ID (N-01), Site ID (RETURNS), Bill To Customer ID (AARONFIT0001), Bill To Address ID (PRIMARY), Currency ID (Z-US\$), and Customer PO. Below these fields is a table titled "Line Items by Order Entered".

R	C	Type	Return Item Number	U of M	Quantity	Qty Received	Return Price	Extended Price
		SVC	256 SDRAM	Each	2	0	\$0.00	\$0.00
		SVC	256 SDRAM	Each	1	0	\$0.00	\$0.00
					0.00	0.00	\$0.00	\$0.00

RMA Closing **CCDA**

Navigation: Transactions→Field Service→Returns Management→RMA Entry/Update→Additional→RMA Revision Entry

The RMA Closing window will display the Item Revision Level (of the RMA Line Item number selected in the scrolling window) in the Title Bar of the window. This will appear similar to the example below highlighted by the red arrow.



Please Note: To select a line in the RMA Closing window, the user must either check the M or P checkbox or click into the Repair Cost or Repair Price field.

Report Integrations	CCDA
<p>Report Integrations</p> <ol style="list-style-type: none">1. To support printing the Item Revision Level on the following Manufacturing Reports, an integration will be provided for a report writer function called <code>RW_TableHeaderString()</code>:<ul style="list-style-type: none">• Manufacturing Order Variance – Production• Working Routing• Picklist Summary Report2. To support printing the Item Revision Level on the following RMA Reports, an integration will be provided for a report writer function called <code>RW_TableLineString()</code>:<ul style="list-style-type: none">• Returns Authorization Form• RMA Recv Report• RMA Invoice Preview Report <p>The documentation provided with the customization will provide step-by-step instructions on how to add a calculated field to existing GP reports which will display the fields.</p> <p>Modifying Reports is NOT included in this estimate.</p>	

<i>Assumptions/Requirements</i>	
<ul style="list-style-type: none">• The enhancement will be written for GP2013. Web Client functionality will not be utilized.	