

# Suggested Order Export / SO Export

Target Release	2017R4	2017R6	2018R4	2019R2	2019R3
Feature Request	<p><b>INF-3987</b> - Track changes to suggested orders <b>DONE</b></p>	<p><b>INF-7403</b> - Suggested Order Export - Include more details from suggested orders to AWS <b>DONE</b></p> <p><b>INF-7371</b> - Suggested Order Export - Need to export all Suggested Items, including those not ordered <b>DONE</b></p>	<p><b>INF-9415</b> - SO - User would like to set standard purchase order item quantities to default on PO <b>DONE</b></p>	<p><b>INF-8754</b> - SO - Create Allocations Functionality for Ordering <b>DONE</b></p>	<p><b>INF-11694</b> - SO-Add Cover Until Date/Timestamp, Order Status &amp; Invoice # fields to SO export <b>IN DEVELOPMENT</b></p> <p><b>INF-11761</b> - SO- Restaurant-facing configuration to toggle suggested quantities on and off <b>IN DEVELOPMENT</b></p>
Changes	Initial Implementation			Allocations added	Added new fields
Analyst	George Sandru				
Product Manager	Will Englefield				

## Business Requirement

Need the ability to capture user entered order quantities vs the system suggested order and exported data is persisted to AWS for analysis.

- **INF-7371** - Suggested Order Export - Need to export all Suggested Items, including those not ordered **DONE**
- Include all items that were suggested, including those that set to zero by the user (i.e. not ordered)
- **INF-7371** - Suggested Order Export - Need to export all Suggested Items, including those not ordered **DONE**
- Add more data points to the export, also ensure that all items are included in the export where:
  - Suggested Quantity > 0
  - Ordered Quantity > 0
  - Received Quantity > 0
  - In other words, the only items that are not included in this export are those items that are NOT suggested items, and are not ordered
    - All suggested items, ordered items and received items are included in the export
  - The export is only triggered when the order is received (previously in 2017R4, INF-3987), the export was triggered when the order was placed
- **INF-9415** - SO - User would like to set standard purchase order item quantities to default on PO **DONE**
  - **INF-10419** - Suggested Order Export - Include Default Order Quantity **DONE**
- **INF-11694** - SO-Add Cover Until Date/Timestamp, Order Status & Invoice # fields to SO export **IN DEVELOPMENT**
  - Add Cover Until Date
  - Add Order Status
  - Add Forecast Range
  - Add Distributor Invoice Number
  - Trigger Export when order is canceled
- **INF-11761** - SO- Restaurant-facing configuration to toggle suggested quantities on and off **IN DEVELOPMENT**
  - Include a field, at the order level (not line item) to indicate that for this order the store was configured to Set Suggested Quantities to Zero

## Scenarios being solved

### When is the export sent?

1. SO Export sent when order is Created
2. SO Export sent when order is Received
3. SO Export sent when Correct Receive Action is performed
4. SO Export sent when Change Apply Date action is performed
5. SO Export sent when order is Cancelled

### Scenarios that impact the Header records

1. Change Apply Date - OriginalOrderNumber included
2. Recieve Order - DateReceived & DateApplied Included
3. Associate an ASN to the order, and Auto Recieve via ASN - Changes AutoReceived, form FALSE to TRUE
4. Order Status
  - a. Placed - When the order is created
  - b. Received - When the order is Recieved / Correct Recieve / Change Apply Date
  - c. Cancelled - When the order is Cancelled
5. Forecast Range - Closed Days should be excluded when calculating the forecast range
6. SuggestedStatus - Based on the Store level Order Setting "Set Suggested Quantity to Zero"
  - a. Set Suggested Quantity to Zero = Checked Suggested Values Auto Cleared
  - b. Set Suggested Quantity to Zero = Unchecked Suggested Values Used

### Scenarios the impact the Detail records

1. Item Suggested - ForecastUsage, SafetyStock, OnHand, OnOrder & SuggestedQty - All included
2. Item not Suggested - ForecastUsage, SafetyStock, OnHand, OnOrder & SuggestedQty - These fields will not be included
3. Item Suggested but not Ordered - ReceiveQty not icluded
4. Item Ordered - Both OrderedQty and RecievedQty are present
5. Item is on allocation - RemainingAllocationQty included, shows teh remianing allocaiton quantity at the time the order was created
6. DefaultOrderQuantity - Included when the item is configured with a Default Order Quantity, whether the item is ordered or not
7. Correct Receive - Perfomign a correct receive will change the RecivedQty, but the OriginalReceivedQty should remain constant

## File Format/Layout

**Note:** Example data is not from just one order, so may not make sense, its shown to represent the data format

Element	Example	Optional *	Comments	Release	XML
<b>Header</b>					
OrderNumber	2104525	N			<pre>&lt;?xml version="1.0" encoding="utf-8"?&gt; &lt;SuggestedOrder xmlns:xsi="..." xmlns:xsd="..."&gt;   &lt;OrderNumber&gt;2104500&lt;/OrderNumber&gt;   &lt;StoreNumber&gt;01580&lt;/StoreNumber&gt;   &lt;Vendor&gt;MBM CORPORATION&lt;/Vendor&gt;   &lt;Date&gt;2019-04-30T10:51:07&lt;/Date&gt;   &lt;VendorNumber&gt;21586&lt;/VendorNumber&gt;   &lt;DatePlaced&gt;2019-04-30T10:51:07&lt;/DatePlaced&gt;   &lt;AutoReceived&gt;FALSE&lt;/AutoReceived&gt;   &lt;DateCreated&gt;2019-04-30T10:50:25&lt;/DateCreated&gt;   &lt;CoverUntil&gt;2019-05-01T06:45:00&lt;/CoverUntil&gt;   &lt;OrderStatus&gt;Placed&lt;/OrderStatus&gt;   &lt;ForecastRange&gt;0.83&lt;/ForecastRange&gt;   &lt;SuggestedStatus&gt;Suggested Values   Used&lt;/SuggestedStatus&gt;</pre>
OriginalOrderNumber	2104500	Y	Only included after Change Apply Date action is performed		
StoreNumber	01580	N			
Vendor	MBM CORPORATION	N			
Date	2019-05-02T13:00:00	N			
VendorNumber	21586	N			
DatePlaced	2019-05-02T13:00:00	N			
DateReceived	2019-04-30T11:21:28	Y	Only present once the order has been received		
DateApplied	2019-04-30T07:33:00	Y	Only present once the order has been received/applied		
AutoReceived	FALSE	N	Indicates if the Order was Auto Recieved via ASN		

DateCreated	2019-05-02T12:59:35	N		
CoverUntil	2019-05-04T06:45:00	N		2019R3
OrderStatus	Cancelled	N	Placed / Received / Cancelled	2019R3
ForecastRange	1.74	N	Difference between Date Created and CoverUntil, minus and Closed Days	2019R3
SuggestedStatus	Suggested Values Auto Cleared	N	Suggested Values Used / Suggested Values Auto Cleared  <ul style="list-style-type: none"> <li>This indicates whether a store switched off SO or not</li> </ul>	2019R3
DistributorInvoiceNumber	INV-78945613	Y	The invoice number provided, in the ASN file, by the Distributor	2019R3
<b>Detail</b>				
ItemCode	030014	N		<SuggestedOrderDetails> <SuggestedOrderDetail> <ItemCode>478659</ItemCode> <Description>Chicken Pie</Description> <ForecastUsage>0</ForecastUsage> <SafetyStock>0</SafetyStock> <OnHand>0.3</OnHand> <OnOrder>0</OnOrder> <SuggestedQty>0</SuggestedQty> <OrderedQty>1</OrderedQty> <ReceivedQty>2</ReceivedQty> <OriginalReceivedQty>1</OriginalReceivedQty> <DefaultOrderQuantity>5</DefaultOrderQuantity> </SuggestedOrderDetail> </SuggestedOrderDetails>
Description	DILL CHIP, CFA	N		
ForecastUsage	1.2	Y		
SafetyStock	0.66	Y		
OnHand	22.82	Y		
OnOrder	0	Y		
SuggestedQty	0	Y		
OrderedQty	1	N		
ReceivedQty	2	Y	Included if OrderedQty <> 0.  In other words, if the item was Suggested but not Ordered.  Represents the most recent received quantity.  Can be updated via Correct Receive.	
OriginalReceivedQty	1	Y	The original Quantity recieved, matches the Recieved Qty when teh order is first received. This value does not change with Correct Receive.	

RemainingAllocationQty	10	Y	Indicates the remaining allocation quantity for an item, at the time the order was created.	2019R1
DefaultOrderQuantity	5	Y	If configured, this indicates that the item has a Default Order Quantity configured.	2018R4
*Fields that are optional, may not always be present in the file				

## Sample of SO Export Sent at Create

### SO Export - Create Order # 2104500

```

<?xml version="1.0" encoding="utf-8"?>
<SuggestedOrder xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <OrderNumber>2104500</OrderNumber>
  <StoreNumber>01580</StoreNumber>
  <Vendor>MBM CORPORATION</Vendor>
  <Date>2019-04-30T10:51:07</Date>
  <VendorNumber>21586</VendorNumber>
  <DatePlaced>2019-04-30T10:51:07</DatePlaced>
  <AutoReceived>FALSE</AutoReceived>
  <DateCreated>2019-04-30T10:50:25</DateCreated>
  <CoverUntil>2019-05-01T06:45:00</CoverUntil>
  <OrderStatus>Placed</OrderStatus>
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  <SuggestedStatus>Suggested Values Used</SuggestedStatus>
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    <SuggestedOrderDetail>
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    <SuggestedOrderDetail>
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      <SafetyStock>0.49</SafetyStock>
      <OnHand>-0.51</OnHand>
      <OnOrder>0</OnOrder>
      <SuggestedQty>8</SuggestedQty>
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      <ReceivedQty>0</ReceivedQty>
    </SuggestedOrderDetail>
    <SuggestedOrderDetail>
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      <OnOrder>0</OnOrder>
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      <RemainingAllocationQty>10</RemainingAllocationQty>
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</SuggestedOrderDetails>  
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## Sample of SO Export Sent at Receive

### ▼ SO Export - Receive Order # 2104500

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ï»¿ <?xml version="1.0" encoding="utf-8"?>
<SuggestedOrder xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <OrderNumber>2104500</OrderNumber>
  <StoreNumber>01580</StoreNumber>
  <Vendor>MBM CORPORATION</Vendor>
  <Date>2019-04-30T10:51:07</Date>
  <VendorNumber>21586</VendorNumber>
  <DatePlaced>2019-04-30T10:51:07</DatePlaced>
  <DateReceived>2019-04-30T10:52:00.097</DateReceived>
  <DateApplied>2019-04-30T06:51:00</DateApplied>
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  <CoverUntil>2019-05-01T06:45:00</CoverUntil>
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<Description>CHICKEN, BREAKFAST FILETS BRK</Description>
<ForecastUsage>0.63</ForecastUsage>
<SafetyStock>0.35</SafetyStock>
<OnHand>124.1</OnHand>
<OnOrder>0</OnOrder>
<SuggestedQty>0</SuggestedQty>
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</SuggestedOrderDetail>
</SuggestedOrderDetails>
</SuggestedOrder>
```

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**Sample of SO Export Sent at Correct Receive**

▼ SO Export - Correct Receive Order # 2104500

```
ï»¿ <?xml version="1.0" encoding="utf-8"?>
<SuggestedOrder xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <OrderNumber>2104500</OrderNumber>
  <StoreNumber>01580</StoreNumber>
  <Vendor>MBM CORPORATION</Vendor>
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  <VendorNumber>21586</VendorNumber>
  <DatePlaced>2019-04-30T10:51:07</DatePlaced>
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  <AutoReceived>FALSE</AutoReceived>
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  <CoverUntil>2019-05-01T06:45:00</CoverUntil>
  <OrderStatus>Received</OrderStatus>
  <ForecastRange>0.83</ForecastRange>
  <SuggestedStatus>Suggested Values Used</SuggestedStatus>
  <DistributorInvoiceNumber>INV-78945613</DistributorInvoiceNumber>
  <SuggestedOrderDetails>
    <SuggestedOrderDetail>
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      <Description>SODA, HI-C ORANGE BIB</Description>
      <ForecastUsage>0</ForecastUsage>
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      <SuggestedQty>0</SuggestedQty>
      <OrderedQty>0</OrderedQty>
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    <SuggestedOrderDetail>
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      <Description>CHICKEN, FILETS</Description>
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      <OriginalReceivedQty>1</OriginalReceivedQty>
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      <OriginalReceivedQty>1</OriginalReceivedQty>
      <RemainingAllocationQty>10</RemainingAllocationQty>
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      <Description>EGGS, DICED FROZEN</Description>
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      <SuggestedQty>0</SuggestedQty>
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    <SuggestedOrderDetail>
      <ItemCode>063783</ItemCode>
      <Description>BAG, COOKIE INDV</Description>
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## Sample of SO Export Sent at Change Apply Date

### ▼ Change Apply Date - Order 2104500 replaced with 2104502

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<StoreNumber>01580</StoreNumber>
<Vendor>MBM CORPORATION</Vendor>

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<CoverUntil>2019-05-01T06:45:00</CoverUntil>  
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<SuggestedOrderDetail>  
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<SuggestedOrderDetail>  
<ItemCode>030002</ItemCode>  
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<OnHand>19.31</OnHand>  
<OnOrder>0</OnOrder>  
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<OrderedQty>0</OrderedQty>  
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<Description>WHIPPED CREAM AEROSOL D</Description>  
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## Sample of SO Export Sent at Cancel

### ▼ Cancelled Order - Order # 2104525

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<Vendor>MBM CORPORATION</Vendor>
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<AutoReceived>FALSE</AutoReceived>
<DateCreated>2019-05-02T12:59:35</DateCreated>
<CoverUntil>2019-05-04T06:45:00</CoverUntil>
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<ItemCode>030002</ItemCode>  
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<ItemCode>101562</ItemCode>
<Description>CHICKEN, BREAKFAST FILETS BRK</Description>
<ForecastUsage>2.11</ForecastUsage>
<SafetyStock>0.56</SafetyStock>
<OnHand>430.81</OnHand>
<OnOrder>0</OnOrder>
<SuggestedQty>0</SuggestedQty>
<OrderedQty>0</OrderedQty>
</SuggestedOrderDetail>
<SuggestedOrderDetail>
<ItemCode>101627</ItemCode>
<Description>SYRUP, LIME CONCENTRATE</Description>
<OrderedQty>8</OrderedQty>
<ReceivedQty>0</ReceivedQty>
</SuggestedOrderDetail>
<SuggestedOrderDetail>
<ItemCode>212121</ItemCode>
<Description>Chili</Description>
<ForecastUsage>0</ForecastUsage>
<SafetyStock>0</SafetyStock>
<OnHand>18</OnHand>
<OnOrder>0</OnOrder>
<SuggestedQty>0</SuggestedQty>
<OrderedQty>7</OrderedQty>
<ReceivedQty>0</ReceivedQty>
<DefaultOrderQuantity>7</DefaultOrderQuantity>
</SuggestedOrderDetail>
</SuggestedOrderDetails>
</SuggestedOrder>

```

---

[Link to data originally on this page, removed in 2019R3](#)

- [OLD Page - Suggested Order Tracking Export](#)

---

## Implementation

1. When a PO is successfully received, an export file is generated, which contains data that is relevant to the order that was submitted
2. The export should contain both the Suggested Quantity and the Ordered Quantity for all items in the order
3. If the item is not a suggested item, a Suggested Qty of zero should be exported
4. If the Suggested Quantity is zero, a Suggested Qty of zero should be exported
5. If the Suggested Qty = The Ordered Qty, both values should be exported
6. If Suggested Qty <> 0 and Order Quantity = 0, both values should be exported (This was implemented as INF-7371 with 2017.R6)
7. If an order goes On Hold, the export should not be exported until the order is successfully re-submitted and received

## User Interaction

When the purchase order is successfully submitted, the export is generated on Server Manager in an XML file and persisted to the AWS Endpoint

## Configuration

1. Store needs to be configured in the export Zone

The screenshot shows the 'Server Manager - CFATesting' interface. The 'XSLT Export' section is active, displaying configuration for the 'Suggested Order Export' task. The 'Export Tasks' list includes 'Suggested Order Export (With Status Check)' which is checked. The 'Zones' list includes '2017R4' which is checked. The 'Export Rule' section shows 'Fire on Event' set to 'SupplyOrderCreated', 'Date Range Type' set to 'CurrentDay', and 'Number of Retries' set to 0. Buttons for 'Save Export Task', 'Delete', 'New', and 'Reload Lists' are visible at the bottom.

Vendor must include the **Since Date** in order for the suggested values to be exported

The screenshot shows the 'Suppliers' configuration page in the InFORM system. The supplier name is 'THE MARTIN-BROWER COMPANY'. The 'Relationship' is '3rd Party Organization' and the 'Type' is 'Distributor'. The 'Rating' is 'Preferred'. The 'Since' date is set to '3/27/2011'. The 'Accounting Information' section shows 'Tax Code' as 'No Tax' and 'Terms Code' as '30 Days'. The 'Services' section shows 'Main' and 'Other' as 'Not Set'.

Export Format 2017.R6:

```
<?xml version="1.0" encoding="utf-8"?>
<SuggestedOrder xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <OrderNumber>1451763</OrderNumber>
  <StoreNumber>01640</StoreNumber>
  <Vendor>QCD SVCS</Vendor>
  <Date>2017-10-30T17:38:23</Date>
  <VendorNumber>184774</VendorNumber>
  <DatePlaced>2017-10-30T17:38:23</DatePlaced>
  <DateReceived>2017-10-31T14:17:20</DateReceived>
  <DateApplied>2017-10-31T14:16:55</DateApplied>
  <AutoReceived>FALSE</AutoReceived>
  <SuggestedOrderDetails>
    <SuggestedOrderDetail>
      <ItemCode>007872</ItemCode>
      <Description>APRON, DISPOSABLE</Description>
      <ForecastUsage>0.05</ForecastUsage>
      <SafetyStock>0.49</SafetyStock>
      <OnHand>3040.13</OnHand>
      <OnOrder>0</OnOrder>
      <SuggestedQty>0</SuggestedQty>
      <OrderedQty>5</OrderedQty>
      <ShippedQty>5</ShippedQty>
      <ReceivedQty>5</ReceivedQty>
    </SuggestedOrderDetail>
  </SuggestedOrderDetails>
</SuggestedOrder>
```

### Rollout Related

- Document any steps that relate to the roll out of this feature.

---

## Talent, Learning and Communication Information

### User Impact

- Who does this change need to be communicated to (e.g. Service Desk, Operators, both, neither)?
  - TBD
- Why was this change needed or how does it benefit the impacted user(s)?
  - TBD

### Recommended Verbiage (for both)

"TBD."

### Knowledge Base Article Impact

- Does a new knowledge base article need to be created?  
TBD
  - Does an existing knowledge base article need to be updated?  
TBD
-

## Training

- Are there any specifics that will be needed with regards to training?