

Suggested Order - Auto Create Order using InFORM Schedule

Target Release	2017R2
Feature Request	INF-3242
Analyst	Andrew Chupp
Product Manager	Will Englefield

Business Requirement

An order schedule can be manually configured in InFORM, as opposed to a schedule being created by a successful PO Import. The order schedule supports the Order Day and the time at which the order needs to be submitted on that day. This feature creates an order, which is linked to the schedule for the store, and then auto submit the order at the configured time.

Implementation

Order schedule can be added manually using Store Calendar page (MMS_Stores_Calendar2.aspx) or it can be imported using ScheduledOrder import type.

Calendar Action Item
X

Series
Order

Order Type

Auto Select

▼

Supplier

MBM CORPORATION

▼

Standard Order

▼

Auto Submit

Cut Off Time

10:00

🕒

For Delivery

1

days after order

Save

Cancel

As soon as schedule is created, an user will be able to see a link under Suggested Order tab allowing to create an order manually.

00440 - Colony Square

Orders
Suggested Orders

Search Orders...

←
Wed, Mar 15, 2017
→

Distributor	Order #	Auto-Submit Time	Delivery Date	Status	
MBM CORPORATION		10:00 AM	Thu, Mar 16, 2017	Pending	<div style="border: 1px solid #008000; padding: 5px 10px; background-color: #008000; color: white; display: inline-block;">Create New Order</div>

There is a scheduled task that will run at the beginning of day (right after midnight) and will create orders in Draft status for the stores that have order schedules for that day and auto-submit flag checked. Order creation process will ignore any schedules without auto submit/cut off time or with auto submit/cut off time of 00:00. When the auto submit time is reached, the orders will be auto submitted.

User Interaction

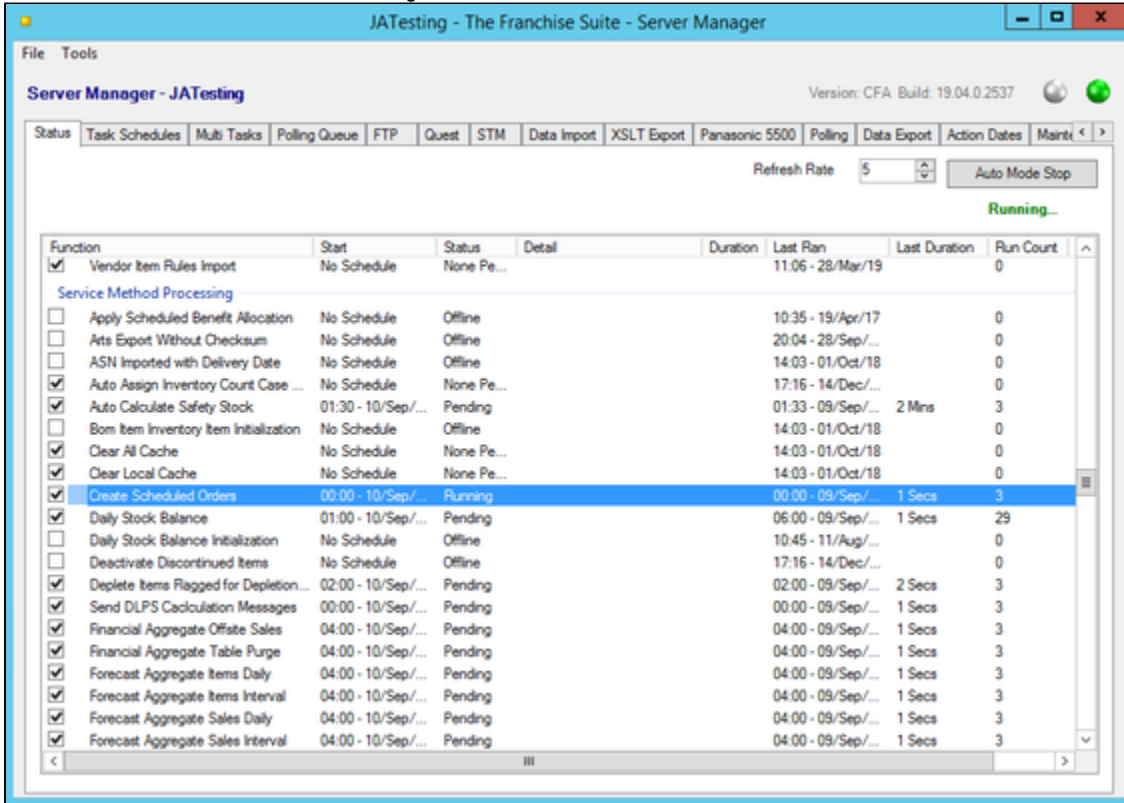
Configuration

- Order schedules will need to entered manually using Store Calendar using Order schedule type

- Order schedules can be imported, Scheduled order import will need to be configured to pull files from vendors using AS2 server. These imports will run daily and create schedules one day at a time
- Create Scheduled Orders Task needs to be schedule to run after midnight

Server Manger Task

- Task to Auto Create Purchase Orders using an Order Schedule



- Service Method Name: Create Scheduled Orders

Example of Order that is Auto Created/Submitted by InFORM

Order Schedule

- Maintain Store Calendar
 - Review Series

Edit Series for Store

Series Order

Title: WB - Auto Test

Description:

Workflow Injection:

Recurrence

Daily Every 1 day(s)

Weekly

Monthly Start Date: Sep-09-2019 09:00

Yearly

Does not end

Ends on: Dec-31-2099

Ends after: 1 occurrence(s)

Save Cancel

Edit Series for Store

Series Order

Order Type: Auto Select

Supplier: MBM CORPORATION

Standard Order

Auto Submit:

Cut Off Time: 11:00

For Delivery: 2 days after order

Delivery Time: 09:00

Save Cancel

- Create Order
 - Defaults to Suggested Orders tab
 - Schedule is displayed, note, the order has not yet been created
 - Note:
 - Status = Pending (Order has not yet been created)
 - Button label = Create New Order (The order can be created manually before the task creates it)

macromatiX Suggested Orders 01580 - Castle Rock FSU

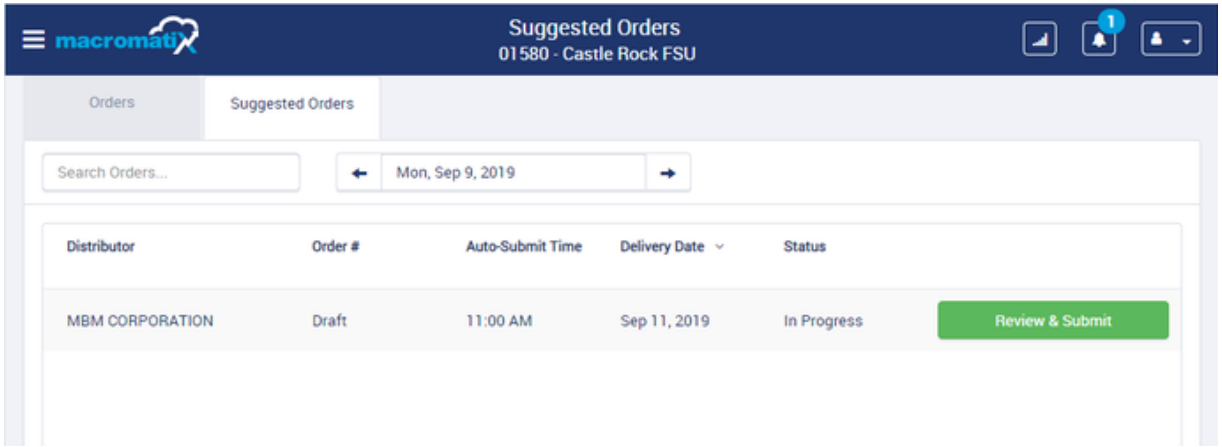
Orders Suggested Orders

Search Orders... Mon, Sep 9, 2019

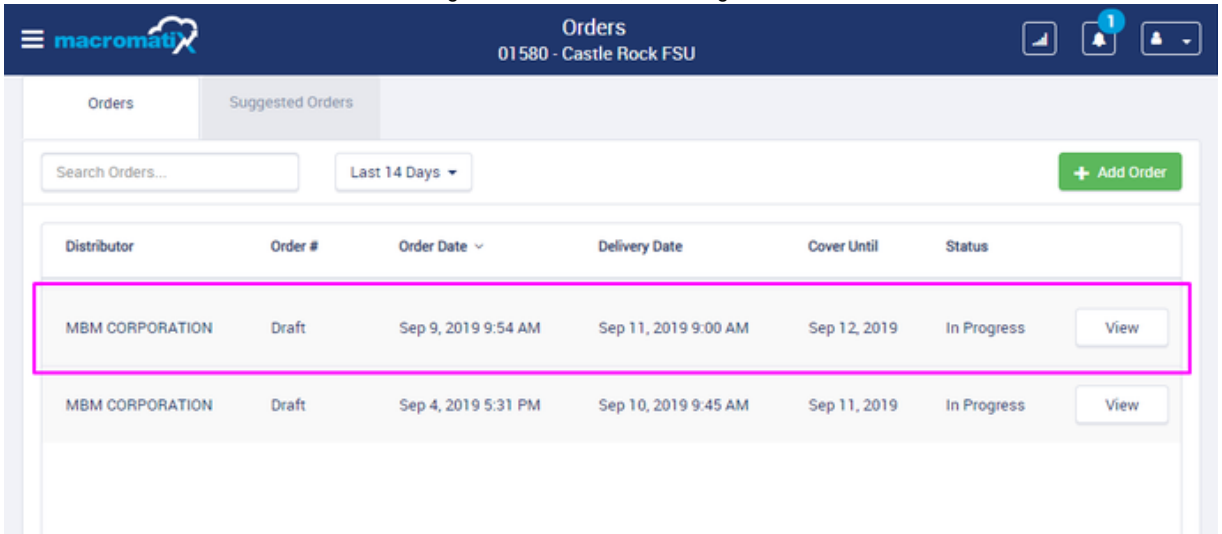
Distributor	Order #	Auto-Submit Time	Delivery Date	Status
MBM CORPORATION		11:00 AM	Sep 11, 2019	Pending

Create New Order

- Execute the task in Server Manager
 - Service Method Name: Create Scheduled Orders
- Create Order
 - Again, the Suggested Order tab is loaded by default
 - The following has changed:
 - Status = In Progress
 - Button label = Review & Submit



-
- Going to the Orders tab
- The order that has been created, is shown alongside other orders, an In Progress



-
- Create Order
- Review the order that was created

macromati Order Details - Order # Draft
01580 - Castle Rock FSU

Search Items... All Items All Categories Manage Columns + Add item(s) Actions

Distributor	Delivery Date	Cover Until	Items In Order	Order Total
MBM CORPORATION	Sep 11, 2019 9:00 AM	Sep 12, 2019 9:00 AM	5 (36 Cases)	\$0.00

Description (Code)	Unit	Quantity	Build To	Forecast	On Hand	For Review
AIR FRSHNR DISPNSR & REFILL (100182)	1 Ct Case	0 <small>Quantity Not Suggested</small>	3	0	139	<input type="checkbox"/>
BISCUIT MIX, LG, 5.25 # 2018 (101622)	8/5.25 # Bag Case	1	-	1.19	0.66	<input type="checkbox"/>
BISCUIT MIX, SM, 2.625 # 2018 (101621)	12/2.625 Lb Bag Case	2	-	1.59	0.88	<input type="checkbox"/>
BISCUIT MIX, SMALL, 2.25# (100328)	12/2.25 Lb Bag Case	1	-	1.85	1.03	<input type="checkbox"/>
SAUCE, BBQ 2/1 GAL (101385)	2/1 Gallon	3 <small>Quantity Not Suggested</small>	0	0	68	<input type="checkbox"/>

Suggested Details
Correct On Hand
Previous Orders
Item Details

- Quantities are populated based on the Time at which the order was created and the Cover Until date/time
- Auto Submit
 - The Order Schedule was configured to Auto Submit the order at 11:00am

Series Order

Order Type: Auto Select

Supplier: MBM CORPORATION

Standard Order

Auto Submit

Cut Off Time 11:00

For Delivery: 2 days after order

Delivery Time: 09:00

- Auto Submit = true
- Cut Off Time = The time by which the order needs to be submitted, if the order is not manually submitted by this time, it will be Auto Submitted
- Create Order
 - Order Auto Submitted

Orders 01580 - Castle Rock FSU

Orders Suggested Orders

Search Orders... Last 14 Days + Add Order

Distributor	Order #	Order Date	Delivery Date	Cover Until	Status	
MBM CORPORATION	2104694	Sep 9, 2019 9:54 AM	Sep 11, 2019 9:00 AM	Sep 12, 2019	Placed	View
MBM CORPORATION	Draft	Sep 4, 2019 5:31 PM	Sep 10, 2019 9:45 AM	Sep 11, 2019	In Progress	View

11:03 AM
9/9/2019

-
- Order Details

Orders 01580 - Castle Rock FSU

Orders Suggested Orders

Search Orders... Last 14 Days + Add Order

Distributor	Order #	Order Date	Delivery Date	
MBM CORPORATION	2104694	Sep 9, 2019 9:54 AM	Sep 11, 2019 9:00 AM	View
MBM CORPORATION	Draft	Sep 4, 2019 5:31 PM	Sep 10, 2019 9:45 AM	View

Order Details

Status

Placed

Cover Until

Sep 12, 2019

Created

Sep 9, 2019 9:54 am (ET) Auto Submitted

Placed

Sep 9, 2019 11:00 am (ET) Auto Submitted

Received by Distributor

Distributor Estimated Delivery Date/Timestamp

Rollout Related

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

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?