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Blue Moon Operations Core Integration

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Overview

SalesPad integration with Blue Moon's Operations Core features several components such as Auto Release for sales documents, purchase orders, and inventory item, as well as WMS Status and Lock, and Fulfillment Options. This document describes these components and how to enable and use them in SalesPad.

Blue Moon's Operations Core integration also includes the Shipment Inquiry tool. Please refer to documentation [Blue Moon Operations Core Shipment Inquiry](#) for more details.

Note: The Blue Moon Operations Core Integration is a licensed addon. Please reach out to your Account Manager for more information on licensing and implementation.

Sales Document Auto Release

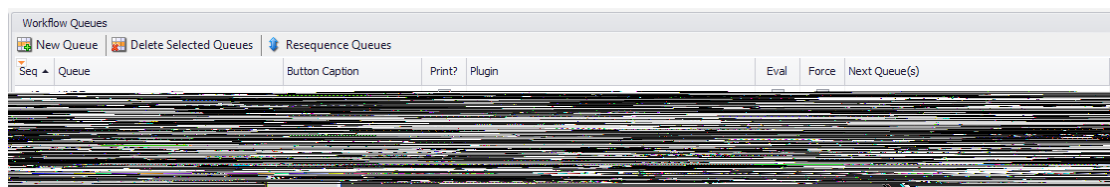
Auto Release for sales documents is a functionality that sends a notification to Operations Core each time a sales document is moved to a specific queue/batch (released); Operations Core then sends the sales document to the WMS for processing.

Setup

Enable plugin Blue Moon Operations Core Auto Release for all user groups that have access to Sales Documents. The plugin has the following setting:

- *Allow Auto Release When Locked By The Plant* - If set to True, it allows the user to send the auto release notification even if the sales document is locked by the plant; defaults to "False"
- *Create Sales Document Audit* - If set to True, it creates a log entry in Sales Document Audit when the Auto Release notification is sent to the WMS; defaults to False

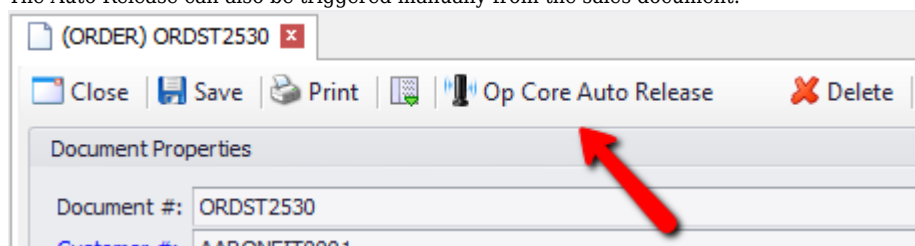
Create a workflow according to your business process, and include a queue that runs the Operations Core Auto Release plugin:



Usage

In the example above, when a sales document leaves the WAREHOUSE+ queue, the plugin runs in the background and sends the appropriate notification to Operations Core.

The Auto Release can also be triggered manually from the sales document:



Order Delete

To enable the notification each time a sales document is deleted, place the following script in Security Editor > Sales Document Entry > Pre Save Script:

```
if (sd.IsMarkedToDelete && sd.SaveAction == SalesDocumentSaveActions.None)
OpCoreAutoRelease.NotifyDocumentDeleted(sd, true);

return "";
```

Note: Sales Document Auto Release is available in the extended module Blue Moon Operations Core in SalesPad 4.4.0.1 or newer.

Purchase Order Auto Release

Auto Release for purchase order sends a notification to Operations Core each time a purchase order is saved, allowing Operations Core to forward the message to the WMS for processing.

To enable the Purchase Order Auto Release, copy and paste the following script into Security Editor > Purchase Order Entry > Pre Save Script:

```
try
{
    if (po.IsNew)
    {
        // We need to force a first save in order to get the po num
        po.Save(true);

        // Since we save the document here, we need to manually show the
message box with the po number
        po.SaveMessage = String.Format("Saved {0}:{1}.", po.val_P0_Type,
po.val_P0_Number) + "\n\n" + po.SaveMessage;
        if (po.SaveMessage.Contains("error"))
            Messenger.Show(null as Form, po.SaveMessage, String.Empty);
        else if (SalesPad.Module.Common.Settings.Show_Pop_Up_Save_Message)
            Messenger.Show(null as Form, po.SaveMessage, String.Empty);

        po.SaveMessage = ""; // Otherwise the message appears twice
    }
}
catch (Exception)
{
    // We need this because any exception thrown during save would be shown twice
    return "";
}
// Send the notification
OpCoreAutoRelease.NotifyPurchaseOrderCreated(po, true);

return "";
```

Note: Purchase Order Auto Release is available in the extended module Blue Moon Operations Core in SalesPad 4.4.0.6 or newer.

Item Number Auto Release

Auto Release for inventory items sends a notification to Operations Core each time an item is created (or updated) in SalesPad, allowing Operations Core to send the item number to the WMS.

Setup

Create the following SQL stored procedure in the GP company database to enable the Item Number Auto Release:

```
SET ANSI_NULLS ON
GO

SET QUOTED_IDENTIFIER ON
```

GO

```
CREATE PROCEDURE [dbo].[spcpUpdateItemMaster] @Item_Number CHAR(31)
AS
IF (@Item_Number = '')
RETURN

--Item auto release notification for when items are created in SalesPad
--This INSERT must happen in the same transaction as sppUpdateItemMaster
--that is why we don't use a trigger (it would not be reliable) IF NOT EXISTS

SELECT 1>
FROM WMI10500 AS w(NOLOCK
WHERE ITEMNMBR = @Item_Number
AND w.Transaction_Type = 20
)
BEGIN
INSERT INTO WMI10500 ( TIMESTMP
,DOCNUMBR
,WMI_Document_Type
,ITEMNMBR
,Transaction_Type
)
SELECT TOP 1 substring(cast(newID() AS CHAR(100)), 1, 24)
, ''
, 0
, im.Item_Number
, 20 -- 'Item_Number' Transaction Type
FROM spItemMaster AS im WITH (NOLOCK)
WHERE im.Item_Number = @Item_Number
AND lower(app_name()) LIKE 'salespad%'
END
```

Usage

When a new item is created in SalesPad (for instance, from the “Item Maintenance” screen), the stored procedure will send the appropriate notification to Operations Core, which will then send the item number to the WMS.

WMS Status and Lock

Status

Operations Core keeps track of the status of the sales order that has been sent to the WMS. These are the possible statuses:

1. AVAILABLE: The document has not been sent to the WMS, yet;
2. RELEASED: The order was sent to the WMS but the warehouse has not acknowledged it, yet;
3. ACKNOWLEDGED: The WMS has received and acknowledged the document;
4. PROCESSING: The warehouse is actively working on the order allocating the items;
5. SHIPPED: The order has been completed and the items are ready to be shipped.

Note: If the status is NOT RECEIVED, this indicates that the Auto Release notification was never sent to the WMS.

The WMS status of an order can be viewed in SalesPad in a Sales Document User Defined Field (UDF).

Create this xWMS_Status User Field below:

User Field Editor

Close Save Update Selected Database Table Update All Database Tables Design Layout Export Import Import Data

Bus. Objects User Fields Field Properties

Bus. Object: Sales Document

Inventory Transaction Line

Item Master

License Plate

License Plate Detail

Location

Opportunity

Opportunity Line Item

Package

Package Detail

Prospect

Purchase Line Item

Purchase Order

Purchase Receipt

Purchase Receipt Line Item

Quick Pick Category

Quick Pick Item

Recurring Sales Def

Recurring Sales Line

Returns Tracker Case

Returns Tracker Detail

RMA

RMA Line

Sales Document

Sales Line Item

Sales Rep

Sales Territory

Service Transfer

Service Transfer Line

System User

Vendor

Vendor Addr

Vendor Item

Workflow Queue

User Fields

New Delete Copy

Seq	Field	Disabled
0	xWMS_Status	<input type="checkbox"/>

Field Properties

Table Name: Sales Document

Field Name: xWMS_Status

Map To: [v] [x]

Screen Label: WMS Status

Field Type: Text Length: 50

Blank Value:

Value Options:

Tooltip:

Description / Notes:

Options

☒ Field is Read Only ☐ Field is Required (Returns Only)

☐ Field is a File Attachment ☐ Field is Rich Text Memo

☐ Field is a Customer Lookup Cust. Class Lookup

☐ Field is a Hyperlink ☐ Field is an Image

☐ Field is Unicode ☐ Is Multi Select

☐ Enable Spell Checker

View Permissions: *

Edit Permissions: *

Quick Report:

UDF Calculation: (SELECT TOP 1 [xWMS_Status] = CASE rb.RBI_Release_Status

Show on Sales Document Types

☐ Quote ☐ Order ☐ Invoice ☐ Return

Audit Info

Created On: 6/12/2025 2:34:17 PM Updated On: 6/12/2025 2:34:17 PM

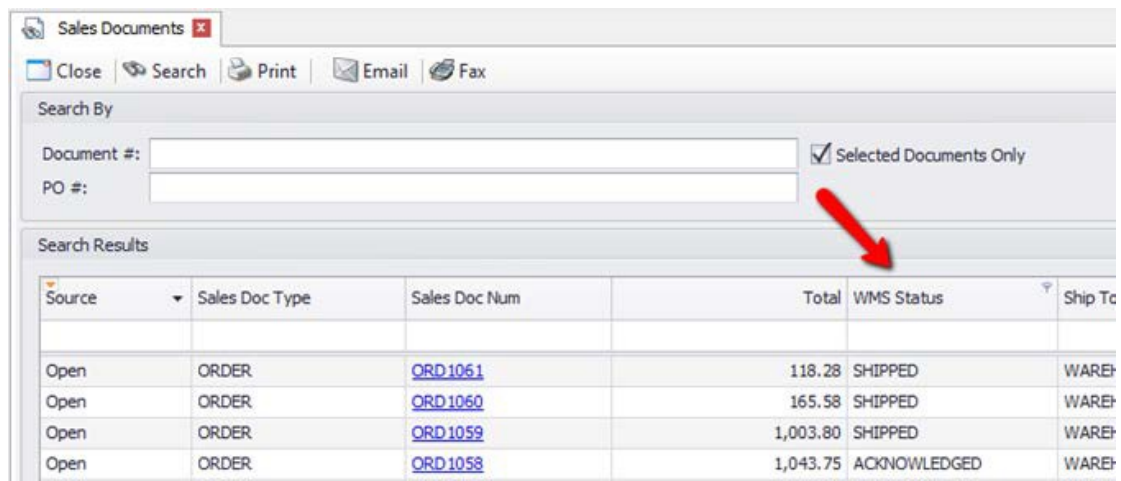
Created By: jacob.beimers Updated By: jacob.beimers

[View Audit](#)

The UDF Calculation will need to be set to:

```
(
SELECT TOP 1 [xWMS_Status] = CASE rb.RBI_Release_Status
    WHEN 1
        THEN 'AVAILABLE' --The document has not been sent to the WMS yet
    WHEN 2
        THEN 'RELEASED' --The document was sent to the WMS but the warehouse has not acknowledged it yet
    WHEN 3
        THEN 'ACKNOWLEDGED' --The WMS has received the document and acknowledged it
    WHEN 4
        THEN 'PROCESSING' --Or LOCKED. The WMS is actively working with the order (allocating the items)
    WHEN 5
        THEN 'SHIPPED' --Or CONFIRMED. The WMS has completed the order
    ELSE 'NOT RECEIVED' --The WMS has never received the document: the Auto Release notification must
    be resent
END
FROM RBI13000 AS rb(NOLOCK)
LEFT JOIN spvSalesDocType AS t ON t.Sales_Doc_Type = b.Sales_Doc_Type
WHERE rb.RBI_Order_Number = b.Sales_Doc_Num
    AND rb.DOCTYPE = t.SOPTYPE
ORDER BY DEX_ROW_ID Desc
)
```

The WMS Status field will be visible in all the main Sales Documents forms:



Sales Documents

Close Search Print Email Fax

Search By

Document #: ☒ Selected Documents Only

PO #:

Search Results

Source	Sales Doc Type	Sales Doc Num	Total	WMS Status	Ship To
Open	ORDER	ORD 1061	118.28	SHIPPED	WAREH
Open	ORDER	ORD 1060	165.58	SHIPPED	WAREH
Open	ORDER	ORD 1059	1,003.80	SHIPPED	WAREH
Open	ORDER	ORD 1058	1,043.75	ACKNOWLEDGED	WAREH

To view the WMS Status in Sales Monitor, create a custom stored procedure called `sppSalesMonitor` (based off of the stored procedure `sppSalesMonitor` in your company database), and add the field `xWMS_Status` and the left join (`RBI13000`) as shown:

-- Beginning of your current stored procedure

```
,[xWMS_Status] = CASE rblock.RBI_Release_Status
WHEN 1
THEN 'AVAILABLE'
WHEN 2
THEN 'RELEASED'
WHEN 3
THEN 'ACKNOWLEDGED'
WHEN 4
THEN 'PROCESSING'
WHEN 5
THEN 'SHIPPED' ELSE 'NOT RECEIVED'
END
FROM SOP10100 AS sh(NOLOCK)
LEFT JOIN RBI13000 AS rblock ON sh.SOPNUMBE = rblock.RBI_Order_Number AND sh.SOPTYPE =
rblock.DOCTYPE
```

-- End of your current stored procedure

Also, change the following line

```
,[Warehouse_Code] = LOCNCODE
```

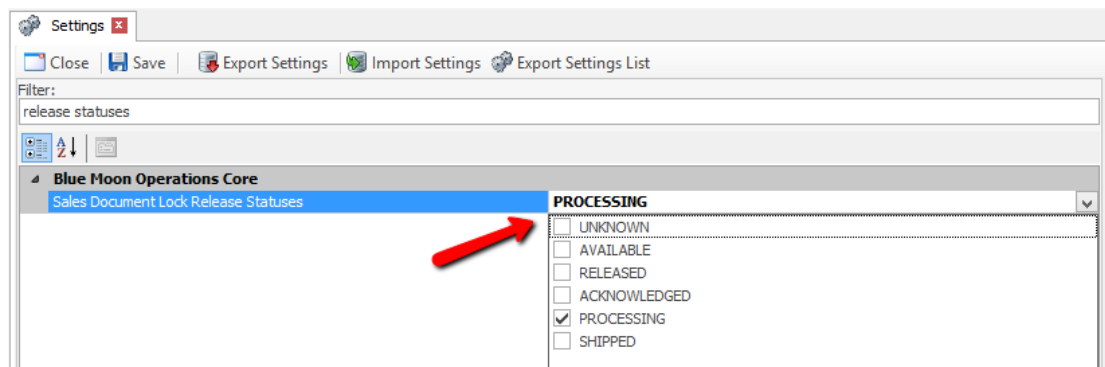
to

```
,[Warehouse_Code] = sh.LOCNCODE
```

Lock

The WMS Status can also be used to lock a sales document when the order is being processed by the warehouse. When the WMS Status is `PROCESSING`, the document will be read-only, therefore CSR cannot modify it.

Note: With SalesPad versions 4.4.1.4 and above, there is a Setting called *Sales Document Lock Release Statuses* that allows administrators to select the release statuses that will lock the sales document:



To enable the WMS lock copy and paste the following script into Security Editor > *Sales Document Entry* > *On Load Script*:

```
if (!sd.IsNew && !sd.val_ReadOnly)
    sd.val_ReadOnly = OpCoreRelease.IsWMSLocked(sd); // Make the doc read-only if it's
"locked" by the plant

return "";
```

Note: WMS Lock requires the extended module Blue Moon Operations Core available in SalesPad 4.4.0.1 or newer.

Sales Document Fulfillment Options

Fulfillment Options is a sales document plugin that allows users to view and edit options such as priority, payment type, cancel and do not ship before data, as well as any additional instructions for the plant.

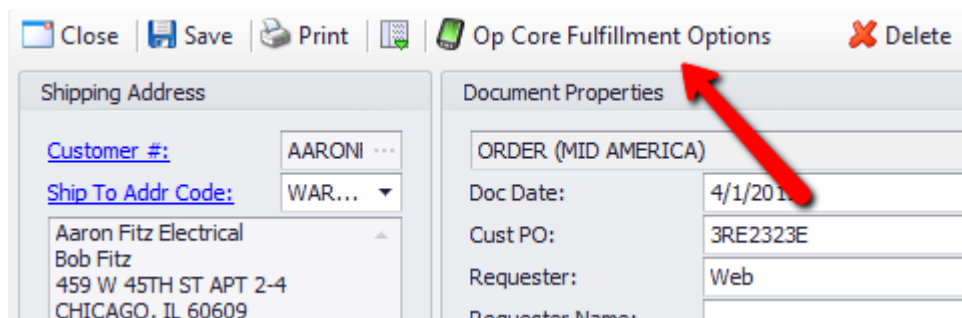
Setup

Enable plugin Blue Moon Operations Core Fulfillment Options in Security Editor for the appropriate user groups. The plugin has the following setting:

Read Only - If set to False, it allows users to make changes and save them; defaults to False

Usage

Plugin Op Core Fulfillment Options is available in the sales document header under Actions menu.



In the window that pops up, make the appropriate changes and click **OK** to save.

Fulfillment Options

☒ Allow Backorders ☒ Ship Complete

Priority: Second Day X Label Format:

Cancel Date: 4/13/2015 Pick Ticket Format:

Do Not Ship Before Date: 4/23/2015 Packing Slip Format:

Ship Payment Type: Third Party X

Carrier Account #: 2346459812

Special Instructions

Instr. 1: Add extra padding Instr. 5:

Instr. 2: Instr. 6:

Instr. 3: Instr. 7:

Instr. 4:

Ship To Notes

Note 1: Do not ship on weekends

Note 2:

Note 3:

Note 4:

Note 5:

OK Cancel

Note: Fulfillment Options is available in the extended module Blue Moon Operations Core in SalesPad 4.4.0.1 or newer.