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

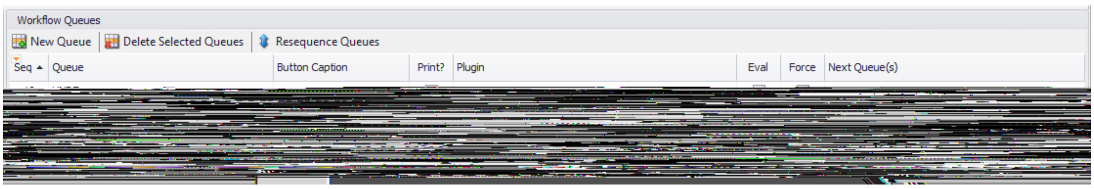
Auto Release for sales documents is a functionality that sends a notification to Operations Core each time a sales document is moved to a specific queue/batch (released); Operations Core then sends the sales document to the WMS for processing.

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

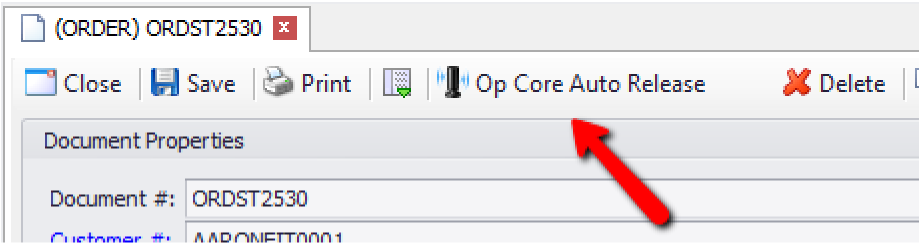
Create a workflow according to your business process, and include a queue that runs the Operations Core Auto Release plugin:



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_PO_Type, po.val_PO_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

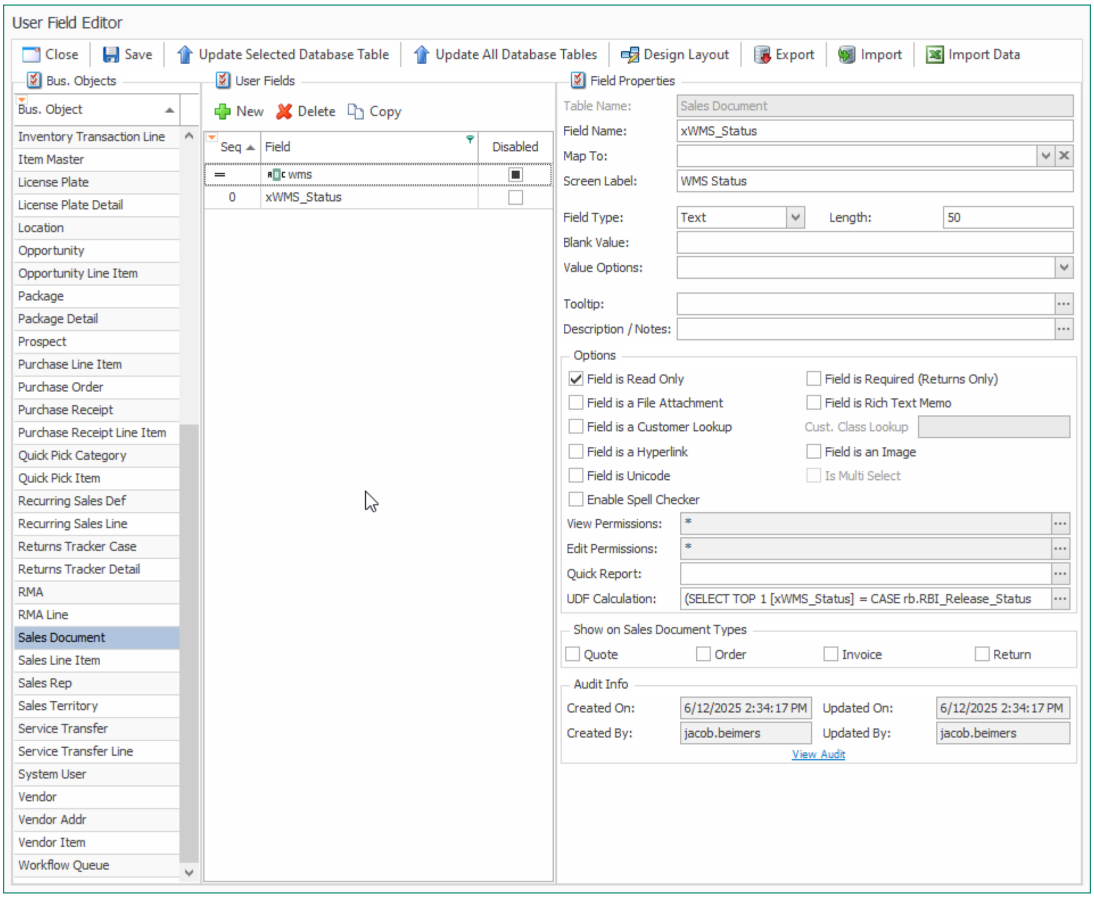
Operations Core keeps track of the status of the sales order that has been sent to the WMS. These are the possible statuses:

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:

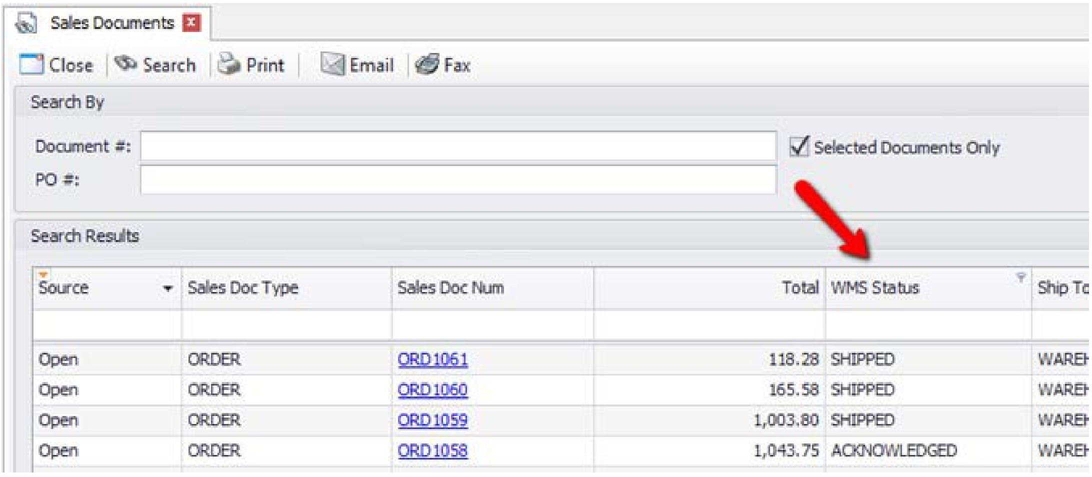


The UDF Calculatation will need to be set to:

```
(
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:



To view the WMS Status in Sales Monitor, create a custom stored procedure called spcpSalesMonitor (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
```

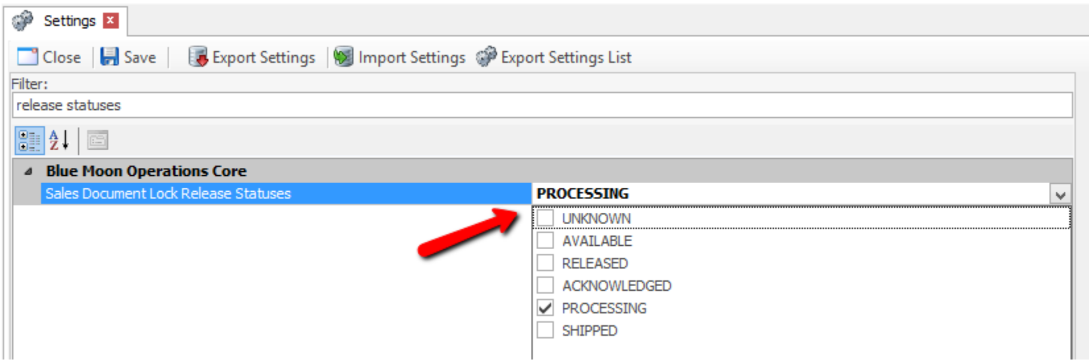
to

```
,[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.

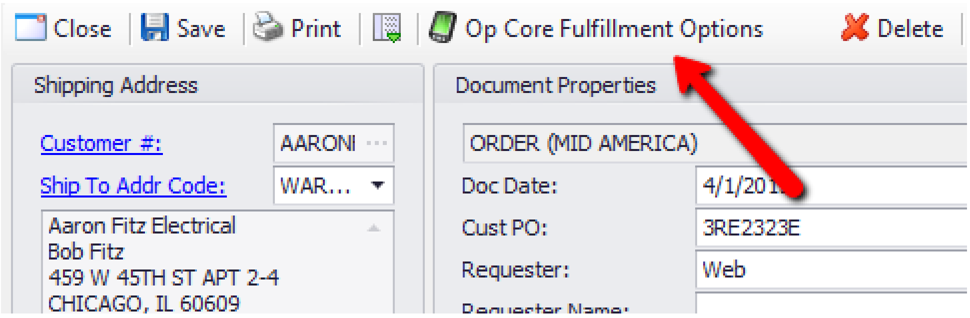
Setup

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

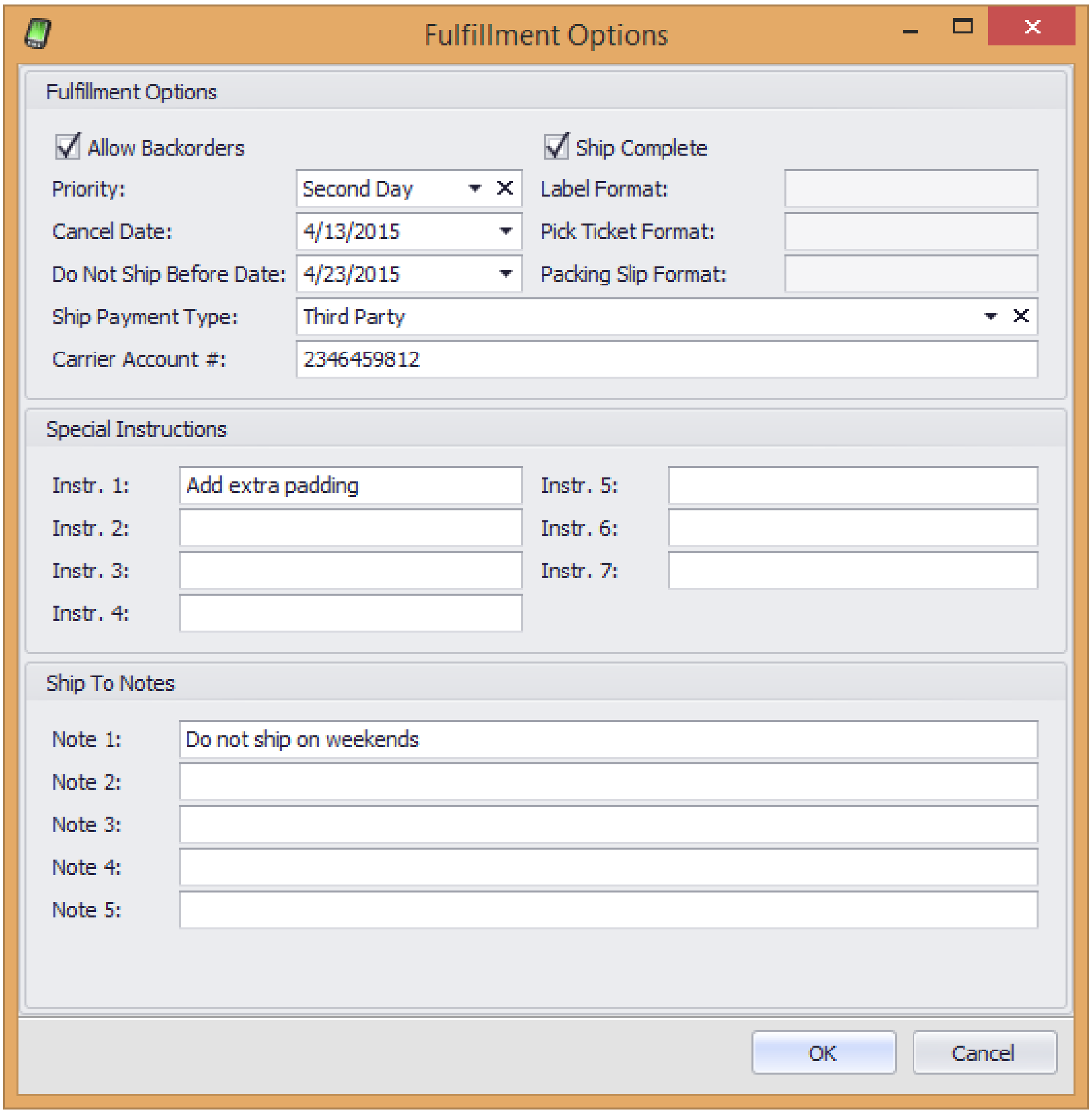
Read Only - If set to False, it allows users to make changes and save them; defaults to False

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.



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