

255576

Aptean Ltd
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Contents

1 255576.....	1
2 255576 PA-7JYHVP / Order Debrief Return Option.....	2
3 Functional Overview.....	3
3.1 Client Requirement.....	3
3.2 Solution.....	3
3.3 Scope.....	4
3.4 Data.....	4
4 Functional Decsription.....	5
5 References.....	8
6 Glossary.....	9
7 Document History.....	10
8 Authorised By.....	11

1 255576



2 255576 PA-7JYHVP / Order Debrief Return Option

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3 Functional Overview

3.1 Client Requirement

TripDtl v2.56 - Non Conformance Screen - add a button to create an image of the selected order with a suffix of [RET] to specify an order that has to be returned (decision made at delivery point) with the ability to edit the detail to cover chargeable or not, storage location if not direct return and collection date.

Added by SS 02/10/08 - When creating a non conformance user should have the option to create a return order in similar fashion to current rebook process, followed by the option to create a rebook order also where required.

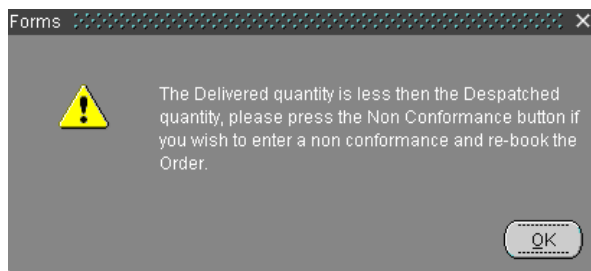
When order details for the return order are displayed user should be able to enter both from and to location. Return order should be identifiable by adding _RET1 to the customer ref.

3.2 Solution

Changes will be applied to the Trip Detail screen, in the Order Debrief tab.

This process will be driven by the delivered qty being less than the despatched qty. The when-validate-item trigger will run after the delivered qty is entered in the order debrief tab.

If the qty is less than the despatched qty, currently a pop-up message will be displayed informing the user that they should select non conformance and create a RETURN order. A global variable called NEED_TO_RETURN will be set to ?Y?.



Once the non conformance screen has been populated, the user will select the save button. At this point the value of NEED_TO_RETURN variable is checked. If this is set to Y, then the user is asked ?Do you want to create a RETURN order for the undelivered stock? If the user selects yes, the RETURN screen is called.

The RETURN screen will be almost identical to the RE-BOOK screen with the following exceptions:

- >The location to and from fields will be set to null, and must be populated.

- >A CHARGEABLE radio button will be displayed

- >All text will be relevant to RETURN and not REBOOK.

Once the user has populated the screen, and selected OK, the return procedure will run.

The RETURN procedure will be almost identical to the REBOOK procedure with the following exceptions:

- >Customer Ref will be appended with _RET

- >Financial information from the original order will not be inherited by the return order, if the return order has been flagged as NOT CHARGEABLE. Package OMS.copy_order and OMS.copy_order_for_rebook will be copied and re-written for return orders.



At the end of the RETURN process, the value of the existing global variable: NEED_TO_REBOOK will be checked. If this is Y, the message ?Do you want to rebook the rest of the order? will be displayed. If the user selects yes, the RE-BOOK process will be run as per current functionality.

We must ensure that the process of creating the RETURN order does not inhibit the ability to create the REBOOK order. The REBOOK process must be run against the original order and not the RETURN order record, for this reason we cannot clear the original order record from the screen after the RETURN process has completed.

If the user selects not to create a RETURN order, the return process will be cancelled and they will be asked if they want to create a REBOOK order as per current functionality.

3.3 Scope

This change will be applied to system version 10.5.0 on CONTST and once approved CONPRD.

3.4 Data

The Return process will create new sch_ord and sch_order_line records. The EXTERNAL_REF and INFO fields of the new records will be updated as will the QTY ordered, this will be set to the difference between despatched and delivered.

A new record will be added into the SCH_ORD_NON_CONFORM table. All audit tables will be updated in line with existing functionality using database triggers.



4 Functional Description

The returns process will be available in the Trip Debrief screen, in the Order Debrief tab. When the delivered quantity is less than the despatched quantity a popup message will be displayed on screen

The screenshot shows the 'Trip Debrief' application window. At the top, there's a menu bar with 'Action', 'MTS Modules', 'Administration', 'Edit', 'Help', and 'Window'. Below the menu bar, there's a header area with navigation buttons (back, forward, search, etc.) and a status bar indicating 'TRIPDTL v2.57' and 'MTS v10.5.0'. The main area contains a form with various input fields and buttons. A modal dialog box is open in the center, displaying a warning message about the delivered quantity being less than the despatched quantity. The dialog has an 'OK' button.

Stop	Load Location	Unload Location	Cust Ref	Line	Prod Type	DU Type	Quantity Plan	Quantity Despatch	Quantity Deliver	Weight Plan	Weight Actual	Volume Plan	Volume Actual	Cases Plan	Cases Actual	C	D
1	Lutterwo_New C	2 Washingt_Asda	448042021	1	AMBIENT	CHEP PA	5.000	5.000	3		0.00	5.00					
1	Lutterwo_New Con	2 Washingt_Asda W	4480420206	1	AMBIENT	CHEP PALI	2.000		2.000		0.00	2.00					
1	Lutterwo_New Con	3 Gateshead_Morriso	4480420212	1	AMBIENT	CHEP PALI	3.000	.000	.000		0.00	3.00					

The Delivered quantity is less than the Despatched quantity, please press the Non Conformance button if you wish to enter a non conformance, a return and /or re-book the Order?

In addition to the message being displayed, two variables NEED_TO_REBOOK and NEED_TO_RETURN will be set to Y.

After selecting OK, the user will select Non-Conformance. The non-conformance screen will be displayed. There are no amendments required for this screen.

Once the non-conformance information is entered and the user has selected OK, the system will check the values of the global variables NEED_TO_RETURN and NEED_TO_REBOOK. If NEED_TO_RETURN is equal to Y, a pop-up message will be displayed on screen

?Do you want to return the quantity that has not been delivered??

If the user selects OK, they will be directed to the returns screen. This screen will be a copy of the re-book screen with some differences, the ?to? and ?from? locations will be set to null and must be populated by the user. There will be an additional field labelled: ?Chargeable?, which will be displayed as a check box.

Once this screen has been populated the return process will be launched, which copies the original order to a new return order. If the chargeable check box is not selected, all the financial data will be set to NULL in the new return order.

The EXTERNAL_REF will have _RET concatenated at the end of the field and the INFO field will be populated with the value ?RETURN?. This will be used to identify Return orders in the future.

At the end of the return process a message will be displayed on screen



?Do you want to rebook the quantity that has not been delivered??

The screenshot displays the 'Non Conformance' window in the MTS Modules Administration software. At the top, there are input fields for 'Schedule Name' (071112), 'Trip ID' (MAN-00008249), and 'Customer Ref' (4480420215). Below these are fields for 'Reason Code' (Weight Excess), 'Activity' (Load), and 'Comments' (test non conformance). A table with columns 'Stop', 'Planned Arr.', 'Dep.', 'Actual Arr.', 'Dep.', 'Type', and 'Location' is visible, containing data for stops 1 through 4. A modal dialog box titled 'Forms' is open in the center, asking 'Do you want to re-book the quantity that has not been delivered?' with 'OK' and 'Cancel' buttons. The right sidebar contains various controls like 'Set Status', 'POC', 'POD', and 'Set All Actuals'.

If the user selects OK, the re-book process will be launched. No changes will be made to this process. However, a minor functional change will be needed to prevent the re-booking of a return order.

Return Records Functionality

In order to maintain system integrity the following rules will be applied:

- >An order can be returned and then rebooked, creating 2 new orders.
- >A re-booked order can be re-booked
- >A re-booked order can be returned
- >A returned order cannot be RE-BOOKED or RETURNED. A new order should be generated.

In short this means the system will not allow repeat ?actions? against a RETURN order.

When a trip is debriefed and the despatched quantity is greater than the delivered quantity, a return check will run. If the order is a RETURN (_RET), the user will be asked to complete the non-conformance screen but will not be offered the chance to create a return or a re-book order, the message displayed will be: ?The Delivered quantity is less than the Despatched quantity, please press the Non Conformance button if you wish to enter a non conformance for this RETURN order?

A return order will be identified using the INFO field in the SCH_ORD table. When a return order is identified the global variables NEED_TO_RETURN and NEED_TO_REBOOK will be set to N, ensuring that the RETURN and REBOOK processes are not available.





5 References

Ref No	Document Title & ID	Version	Date
1	EST 255576 PA-7JYHVP Order Debrief return option v1.doc	1	14/11/08



6 Glossary

Not Available



7 Document History

Version	Date	Status	Reason	Initials
1a	26/11/08	Draft	Initial version	SW
1	26/11/08	Issue	Reviewed and Issued	MJC



8 Authorised By

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