

256637

Aptean Ltd
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1 256637



2 256637 PA-7KPHJ8 EFX Pop-Up box

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3 Functional Overview

3.1 Client Requirement

MTS planning - EFX Pop-Up box - Hide or grey-out 'Trip Cost Man' as a fixed selection, and Hide or grey-out 'Forecast' as a fixed selection

- When allocating a Trip to EFX the Pop-up box offers several options for Cost - hardcode the cost option as 'Trip Cost Man' and hide or grey-out the selection also hardcode 'Forecast' as the status type again hide or grey-out the selection. This leaves 3 boxes for input - Deadline Date, Deadline Time and Rate
- re-adjust the 'Tabbing' sequence to navigate from 'deadline Date' to 'deadline time' to 'rate'

Added by SS 24.10.08 - It may be beneficial to have these controlled by parameters within MTS.

Quicker input of data when the various options are not relevant in this situation

3.2 Solution

Current functionality in TRIP_SUM and TRIP_PLAN, for EFX Payment Details, are as follows:

- The EFX Pop Up Box, named 'Payment Details' in the Trip Screens is only displayed when the checkbox next to 'EFX Ref.' is selected and the current Trip has a Carrier of 'EFX'
- This 'Payment Details' box is pre-populated with Event Ref (Sched_Name || '-' || Trip_Id), Debit Account (Cost Centre) and Credit Account (Carrier_Id), which are greyed out and not editable.
- The user is able to enter a Payment Type and Status, selectable from the drop-down lists
- The user is able to input an Expiry Date, Time and Amount
- When saved table ACC_PAYMENT is updated with the info in the 'Payment Details' box

The Payment Type drop-down list currently contains the following: AM Deliv AL, Demurrage, Extra Drops, FUEL Surch, Fuel Surch, Fuel Surchrg, Premium, Returns, Timed AL, Trip Haul AL, Trip Haul Ma, Trip Haulage

The Payment Status drop-down list currently contains the following: Forecast, Actual, Provisional

Part 1 - EFX Pop-Up Box Input Fields The EFX Pop Up Box will be amended so that when it is displayed, the following items are greyed out and not editable: Event Ref which relates to 'Sched_Name || '-' || Trip_Id' e.g. '081027-MAN-00234567' Debit Account which relates to the Cost Centre of the Trip Credit Account which relates to the Carrier_Id assigned to the Trip Type will be hard coded as 'Trip Haul Ma' Status will be hard coded as 'Forecast'

Therefore, the only fields that will be editable are: Amount, Expiry Date, Expiry Time

The only situation, where the Type and Status are not hard-coded and greyed out will be governed by a User Group having the function ACC_DIFF_EFX_PAYMENT promoted to their Group. If a user is in a particular group with this function promoted, then they will have the ability to select the Type and Status from the drop-down lists.

This therefore requires a new function to be included in table ADM_FUNCTION, with FN_NAME of 'ACC_DIFF_EFX_PAYMENT' and DESCRIPTION of 'Ability to amend Payment Type and Status for a Trip with a Carrier Id of EFX, in the TRIP screens'.

This function will then be available in the 'Functions' tab of the Group Maintenance screen for promoting.

Part 2 - Tabbing Issue When the EFX Pop Up Box is displayed, the tab sequence between fields will be as follows;



When Type and Status Hard-coded: Expiry Date - Expiry Time - Amount - OK - Cancel (Back to Expiry Date at Beginning)
When Type and Status Editable: Type - Status - Expiry Date - Expiry Time - Amount - OK - Cancel (Back to Expiry Date at Beginning)

3.3 Scope

This change will be applied to system version 10.6 on CONTST and once approved CONPRD.

3.4 Data

A new function needs to be created in table ADM_FUNCTION, called ACC_DIFF_EFX_PAYMENT. The only situation, where the Type and Status are not hard-coded and greyed out will be governed by a User Group having the function ACC_DIFF_EFX_PAYMENT promoted to their Group. If a user is in a particular group with this function promoted, then they will have the ability to select the Type and Status from the drop-down lists. Table ADM_FUNCTION will be updated to include the new function as follows



4 Functional Description

Sample Layout

Below is a screenshot of how the ?Functions? tab within the Group Maintenance form will display when the new function has been created, and is ready to be promoted:

Functions Authorised for use by Group	
ACC_Confirm_Payment	Ability to confirm payments.
ACC_Update_Payment	Ability to update payments.
OMS_edit_populated_customer_ref	Ability to edit a customer ref that has already been populated
ORD_Apply_POD	Ability to apply PODs.
ORD_Edit_Invalid	Ability to edit invalid orders.
ORD_Edit_Unscheduled	Ability to edit unscheduled orders.

Functions Available	
ACC_Create_Payment	Ability to manually create payments.
ACC_Delete_Account	Allow the deletion of accounts.
ACC_Delete_Invoice_Rqt	Allow the deletion of invoice requirements.
ACC_Delete_Payment	Ability to manually delete payments.
ACC_Diff_EFX_Payment	Ability to amend Payment Type and Status for a Trip with a Carrier Id
ACC_Edit_Invoice	Ability to edit invoice details.

Below is an example of how the EFX pop-up will be displayed without the promotion of the new function:

Payment Details

Event Ref: 061205-MAN-00214404

Debit Account: EXEL

Credit Account: EFX

Type: Trip Haul Ma

Status: Forecast

Amount:

OK Cancel

Below is how the EFX Pop-Up Box will be displayed when the user has the new function ACC_DIFF_EFX_Payment promoted to their user group:

Payment Details

Event Ref: 061205-MAN-00214404

Debit Account: EXEL

Credit Account: EFX

Type:

Status:

Amount:

OK Cancel

The tabbing sequence between fields within the EFX Pop-Up Box will be as follows:

When Type and Status Hard-coded: Expiry Date - Expiry Time - Amount - OK - Cancel (Back to Expiry Date at Beginning)



When Type and Status Editable: Type - Status - Expiry Date - Expiry Time - Amount - OK - Cancel (Back to Expiry Date at Beginning)

This is achieved by setting the ?Next Navigation Item? property within the Property Palette for each field in the Pop-Up. Below you can see that the Next Navigable item from the ?Expiry Date? will be ?Expiry Time?:

General	
Name	EXPIRY_DATE
Item Type	Text Item
Subclass Information	
Comments	
Help Book Topic	
Functional	
Enabled	Yes
Justification	Start
Implementation Class	
Multi-Line	No
Wrap Style	Word
Case Restriction	Mixed
Conceal Data	No
Keep Cursor Position	No
Automatic Skip	No
Popup Menu	<Null>
Navigation	
Keyboard Navigable	Yes
Previous Navigation Item	<Null>
Next Navigation Item	EXPIRY_TIME

4.1 Code Amendments

Code is required to set up the EFX Pop-Up box either with the Payment Type and Status hard-coded or else selectable from drop-down lists depending on the new function.

A sql script will need to be run against the test and live databases to insert the new function into table ADM_FUNCTION this is to allow the promotion to user groups if desired in the future:



5 References

Ref No	Document Title & ID	Version	Date
1	EFX Trip haul.doc	0	0
2	EST-256637 PA-7KPHJ8 EFX Pop-Up box v1.doc	1	30/10/08



6 Glossary

Not Available



7 Document History

Version	Date	Status	Reason	Initials
1a	13/11/08	Draft	Initial version	LAD
1	13/11/08	Issued	Reviewed and Issued	MJC



8 Authorised By

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