

**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: Forecast

Status: Forecast

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?:

<b>General</b>	
Name	EXPIRY_DATE
Item Type	Text Item
Subclass Information	
Comments	
Help Book Topic	
<b>Functional</b>	
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>
<b>Navigation</b>	
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

<b><i>Matt Crisford</i></b>	Development Manager
<b><i>Suk Sandhu</i></b>	TMSCC MTS Product Manager

