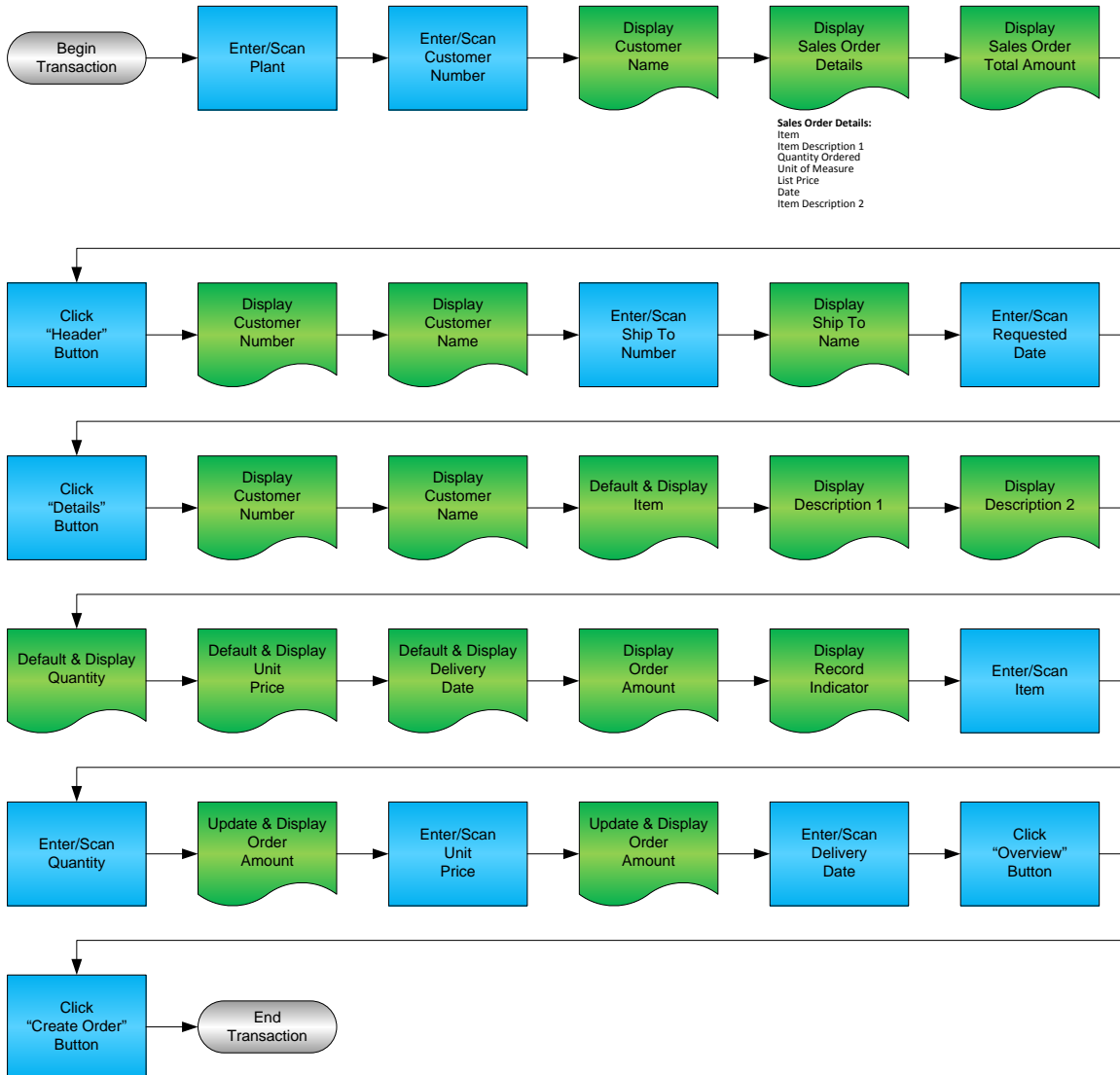


Sales Order Entry by Price List



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Requirements

- RFgen Version 5.0 or later
- RFgen JD Edwards Integration Suite

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FSOEN0100 – Sales Order Entry by Price List



This transaction matches price list records with customer information to generate potential sales order entries that can be edited to create lines on a new sales order.

The following conditions apply to the RFgen implementation for the Information Entry transaction within the EnterpriseOne environment.

Note: any of these parameters may be easily adjusted to meet the unique requirements of your company.

✓ Validations

Prompt	Table	Field
Plant	F0006	MCMCU
Customer	F0101	ABAN8
Item	F4101	IMLITM
Ship To	F0101	ABAN8

✓ Edits

Condition	Table
Quantity > 0	N/A
Unit Price > 0	N/A

↔ Function Keys

Key	Function
F1	Search Data for Current Field
F2	Refresh the Current Screen Display
F3	
F4	Exits Transaction

Considerations

1. What EnterpriseOne version is used to process the Sales Order Entry transaction?
2. What processing options have been set to process Sales Order Entry?
3. Are different document types and line types processed through Sales Order Entry?

EnterpriseOne Programs – Reference

Application Name(s)	Code	Table
Sales Order Entry	P4210	F4211

EnterpriseOne Sales Order Entry:P4210

Quantity Ordered	UoM	Secondary Quantity	Secondary UoM	Item Number	Ln Ty	Unit Price	Extended Price	Branch/Plant	Location
12	EA	12	EA	2001	S	500.0000	6,000.00	30	..
6	EA	6	EA	210	S	350.0000	2,100.00	30	..
6	EA	6	EA	220	S	350.0000	2,100.00	30	..
					S	0.0000			

How JD Edwards® Processing Option affects RFgen

This documentation explains which of the JDE Processing Options are used by RFgen and how the red highlighted Proc.Options effect the RFgen script.

Affected RFgen Forms and Transaction Macros

Description	Form Name	Transaction Macro Name
SO – Sales Order Entry	FSOEN0100	TSOEN0100

Setup an RFgen Menu

To implement an RFgen Form using JDE Processing Options in an RFgen Menu the JDE Version needs to be specified.

Enter the Form name, followed by a Space. Enter “-Pgm=” and the JDE Program, and enter “-Vers=” and the JDE Version.

Form/Menu	Description to Display
FSOEN0100 -Pgm=P4210 -Vers=ZJDE0001	C- SO Entry from Pricelist

Processing Options: P4210 Sales Order Entry

----- <-- Defaults -->

0001 1 1> Order Type (Required) --> [SO]

RFgen defaults the document type based on this value.

0002 1 2> Line Type --> [S]

RFgen defaults the line type based on this value.

```

0003 1 3> Beginning Status --> [520]
0004 1 4> Override Next Status --> [ ]
0005 1 5> Line Number Increment --> [1.000]
0006 1 6> Reason Code --> [ ]
0007 1 7> Override Transaction Unit of Measure --> [ ]
0008 1 8> Default Transaction Unit of Measure --> [1]
0009 1 9> Address Book Revisions --> [ ]
0010 1 10> Update Header to Detail --> [1]
0011 1 11> Header Branch/Plant --> [ ]
0012 1 12> Default Branch/Plant --> [ ]
0013 1 13> Order Template --> [ ]
0014 1 14> Customer Self Service Structure Type --> [ ]
0015 1 15> User ID default (CSS only) --> [ ]
0016 1 16> Override Sold To and Ship To Header (CSS --> [1]
0017 1 17> Override Carrier Number (CSS only) --> [ ]
----- <-- Duplicatio -->
0018 2 1> Order Type --> [ ]
0019 2 2> Beginning Status --> [ ]
0020 2 3> Next Status --> [ ]
0021 2 4> Copy Associated Text --> [ ]
----- <-- Order Hold -->
0022 3 1> Customer Credit Check --> [ ]
0023 3 2> Order Margin Check --> [ ]
0024 3 3> Order Line Margin Check --> [ ]
0025 3 4> Order Minimum Value Check --> [ ]
0026 3 5> Order Maximum Value Check --> [ ]
0027 3 6> Partial Order Hold --> [ ]
0028 3 7> Product Allocation Hold --> [ ]
0029 3 8> Authorization Hold for Prepayment Proces --> [ ]
0030 3 9> Settlement Hold for Prepayment Processin --> [ ]
0031 3 10> Order Process Hold --> [ ]
0032 3 11> Approval Hold --> [ ]
0033 3 12> Exclusive Adjustment Hold --> [ ]
----- <-- Display -->
0034 4 1> Display or Hide Cost Fields --> [ ]
0035 4 2> Display or Hide Price Fields --> [ ]
0036 4 3> Disable Pricing Related Fields --> [ ]
0037 4 4> Disable or Hide Status Codes --> [ ]
0038 4 5> Hide Closed Detail Lines --> [ ]
0039 4 6> Hide Credit Card Information --> [ ]
0040 4 7> Hide Freight and Carrier Information --> [ ]

```

0041	4	8>	Hide Commission Information	-->	[]
0042	4	9>	Hide Kit Components	-->	[]
----		<--	Commitment	-->	
0043	5	1>	Activate Availability Checking	-->	[1]
0044	5	2>	Commit to Quantity 1 or Quantity 2	-->	[]
0045	5	3>	Display Supply and Demand Inquiry Form	-->	[]
----		<--	Currency	-->	
0046	6	1>	Tolerance Limit	-->	[0]
0047	6	3>	Currency Code	-->	[]
0048	6	4>	"As Of" Date	-->	[]
----		<--	Process	-->	
0049	7	1>	Status Code Limit for Changes	-->	[]
0050	7	2>	Subsystem Processing	-->	[]
0051	7	3>	Display Header or Detail	-->	[]
0052	7	4>	Auto Order Repricing	-->	[]
0053	7	5>	Display Before Accept Prompt	-->	[1]
0054	7	6>	Order Template Processing	-->	[]
0055	7	7>	Blanket/Quote Order Processing	-->	[]
0056	7	8>	Agreement Processing	-->	[]
0057	7	9>	Customer Self-Service Functionality	-->	[]
0058	7	10>	Cost or Base Price Markup	-->	[]
0059	7	11>	Ship and Debit Processing	-->	[]
0060	7	12>	Issue Warning for Default Free Good	-->	[]
0061	7	13>	Adjust Accumulated Values in the Volume	-->	[]
0062	7	14>	Prompt for Customer Segment Items	-->	[]
0063	7	15>	Display Warning/Error for Ascending Date	-->	[]
0064	7	16>	Default Selection for Multiple Blanket O	-->	[]
0065	7	17>	Default Selection for Single Blanket Ord	-->	[]
----		<--	Cross Ref	-->	
0066	8	1>	Substitute Items	-->	[S]
0067	8	2>	Complementary Items	-->	[A]
0068	8	3>	Replacement Items	-->	[R]
0069	8	4>	Pricing for Substitute Items	-->	[]
0070	8	5>	Promotional Items	-->	[]
----		<--	Versions	-->	
0071	9	1>	Pick Slip Print Subsystem (R42520)	-->	[]
0072	9	2>	Supply and Demand Inquiry (P4021)	-->	[]
0073	9	3>	Pick Slip Print On Demand (R42520) from	-->	[]
0074	9	4>	Adv Order/Basket Reprice (R42750)	-->	[]
0075	9	5>	Online Invoice Inquiry (P42230)	-->	[]
0076	9	6>	Preference Profile (R40400)	-->	[]
0077	9	7>	Check Price and Availability (P41261)	-->	[]
0078	9	8>	Purchase Order Entry (P4310)	-->	[]
0079	9	9>	Sales Ledger Inquiry (P42025)	-->	[]
0080	9	10>	Bill of Material Inquiry (P30200)	-->	[]
0081	9	11>	Work Order Entry (P48013)	-->	[]
0082	9	12>	Print Invoice (R42565)	-->	[]
0083	9	13>	Online/Subsystem Commitment (R42997)	-->	[]
0084	9	14>	Configured Items (P32942)	-->	[]
0085	9	15>	Sales Order Batch Transaction Editor (R4	-->	[]
0086	9	16>	Credit Check (P42050)	-->	[]
0087	9	17>	Work with Shipments (P4915)	-->	[]

```

0088  9 18> Customer Master (P03013)          --> [ ]
0089  9 19> Ship and Debit (R45100)          --> [ ]
0090  9 20> Apply Volume Level Adjustment (R45900) --> [ ]
0091  9 21> Automatic Document Generation (P00391) --> [ ]
0092  9 22> Customer Segment Items (P42440)    --> [ ]
0093  9 23> Product Variants (P41902)         --> [ ]
0094  9 24> Order Processing (R31410)         --> [ ]
----- <--- Preference --->
0095 10 1> Preference Profile Processing       --> [1]
0096 10 2> Inventory Commitment Preference   --> [ ]
0097 10 3> Override Schedule For Advanced Preferenc --> [ ]
----- <--- Transfers --->
0098 11 1> Activate Transfer Order Entry     --> [ ]
0099 11 2> Sales and Purchase Order Taxable  --> [ ]
0100 11 3> Mandatory Landed Cost            --> [ ]
----- <--- Order Inqu --->
0101 12 1> From Status                       --> [ ]
0102 12 2> To Status                         --> [ ]
0103 12 3> Search on Last or Next Status     --> [ ]
0104 12 4> Date Range                       --> [ ]
0105 12 5> Display Text Lines                --> [1]
0106 12 6> Display Backordered/Canceled lines --> [3]
0107 12 7> Customer Cross Reference Type     --> [ ]
----- <--- Warehouse --->
0108 13 1> Request Processing Mode           --> [1]
0109 13 2> Subsystem Print Pick Request      --> [ ]
0110 13 3> Override Next Status              --> [ ]
----- <--- Store && F --->
0111 14 1> Mode                              --> [ ]
----- <--- Workflow --->
0112 15 1> E-mail Work Order Planner         --> [ ]
0113 15 2> Sales Order Entry Workflow        --> [ ]
----- <--- Multiples --->
0114 16 1> Multiple Schedule                 --> [ ]
0115 16 2> Schedule Line (Future)           --> [ ]
----- <--- Interbranc --->
0116 17 1> Intercompany Invoice              --> [ ]
0117 17 2> Interbranch Order Types          --> [ ]
----- <--- Interop --->
0118 18 1> Transaction Type                  --> [JDES00UT]
0119 18 2> Before/After Image Processing     --> [ ]
----- <--- Prepayment --->
0120 19 1> Prepayment Processing            --> [ ]
0121 19 2> Process Authorization            --> [ ]
0122 19 3> Process Settlement                --> [ ]
0123 19 4> Authorize Prepayment Transaction version --> [ ]
0124 19 5> Settle Prepayment Transaction version --> [ ]
0125 19 7> Authorized lines                  --> [ ]
0126 19 8> Settled lines                     --> [ ]
----- <--- Audit Log --->
0127 20 1> Use Audit Log for Sales Order Changes --> [ ]
0128 20 2> Reason Code required for Sales Order Cha --> [ ]

```

```
0129 20 3> Approval process required for Sales Orde --> [ ]
----- <-- Volume UpS -->
0130 21 1> Alert for Volume Based Up-Sell within To --> [.00]
----- <-- Profit Mar -->
0131 22 1> Enable Gross Profit Margin Pricing --> [ ]
0132 22 2> Adjustment Reason Code for Overrides --> [ ]
0133 22 3> Resolve and Test Target Gross Profit Per --> [ ]
----- <-- Promotion -->
0134 23 1> Default Promotion ID --> [ ]
----- <-- Order Prom -->
0135 24 1> Order Promising --> [ ]
0136 24 2> Order Promising (Future) --> [ ]
----- <-- Matrix -->
0137 25 1> Inventory Parent --> [ ]
```

Test Script Description: Sales Order Entry (P4210)

RFgen Input Requirements

Before you begin testing, ensure, for all equipment numbers you will be testing, that the following is setup in EnterpriseOne or PeopleSoft World.

- a. Item
- b. Quantity Available
- c. Quantity On Hand
- d. An order activity status code for new sales order creation

JD Edwards Processing Option Settings

Enter the Processing Option values, which correspond, to the version you selected for testing.

JDE Version: ZJDE0001_____

Tab	Processing Option Description	Value

Execution Procedures

ID	Test Case	Expected Result	Pass	Fail
1	Type in a Plant _____ Press the ENTER key	RFGEN will validate and accept the plant entered—if the plant is invalid, an error message will be displayed.		
2	Type in a Customer _____ Press the ENTER key	RFGEN will validate and accept the customer entered—if the customer is invalid, an error message will be displayed.		
3	Select a row in the listbox by double-clicking the row or by clicking the row and pressing the ENTER key.	RFGEN will display the selected row as a record that can be edited.		
4	Type in an Item _____ Press the ENTER key	RFGEN will validate and accept the item entered—if the item is invalid, an error message will be displayed		
5	Type in a Quantity _____ Press the ENTER key	RFGEN will validate and accept the quantity entered—if the quantity is invalid, an error message will be displayed		
6	Type in a Unit Price _____ Press the ENTER key	RFGEN will validate and accept the unit price entered—if the unit price is invalid, an error message will be displayed		
7	Type in a Delivery Date _____ Press the ENTER key	RFGEN will validate and accept the delivery date entered—if the delivery date is invalid, an error message will be displayed		
8	Click the “Up” and “Down” buttons	RFGEN will scroll through the list of records associated with the selected customer.		
9	Click the “Overview” button	RFGEN will return to the initial screen displaying the customer and the order details.		
10	Click the “Details” button	RFGEN will display the current row as a record that can be edited.		
11	Click the “Header” button	RFGEN will display the sales order header screen.		
12	Type in a Ship To _____ Press the ENTER key	RFGEN will validate and accept the ship to customer entered—if the ship		

		to customer is invalid, an error message will be displayed		
13	Type in a Request Date _____ Press the ENTER key	RFGEN will validate and accept the request date entered—if the request date is invalid, an error message will be displayed		
14	Press the “F1” key with the cursor in the Item# field to select and return an item number	RFGEN will display a list of items and when selected, item number will be returned to the Item number field—if the item number is invalid, an error message will be displayed.		
15	Click the “Create Order” button	RFGEN will create the sales order in JDE.		

Overall Test Case Results

Pass/Fail	
Tester/Date	
RE-Tester/Date	

Actual Results	
-----------------------	--

Comments	
-----------------	--