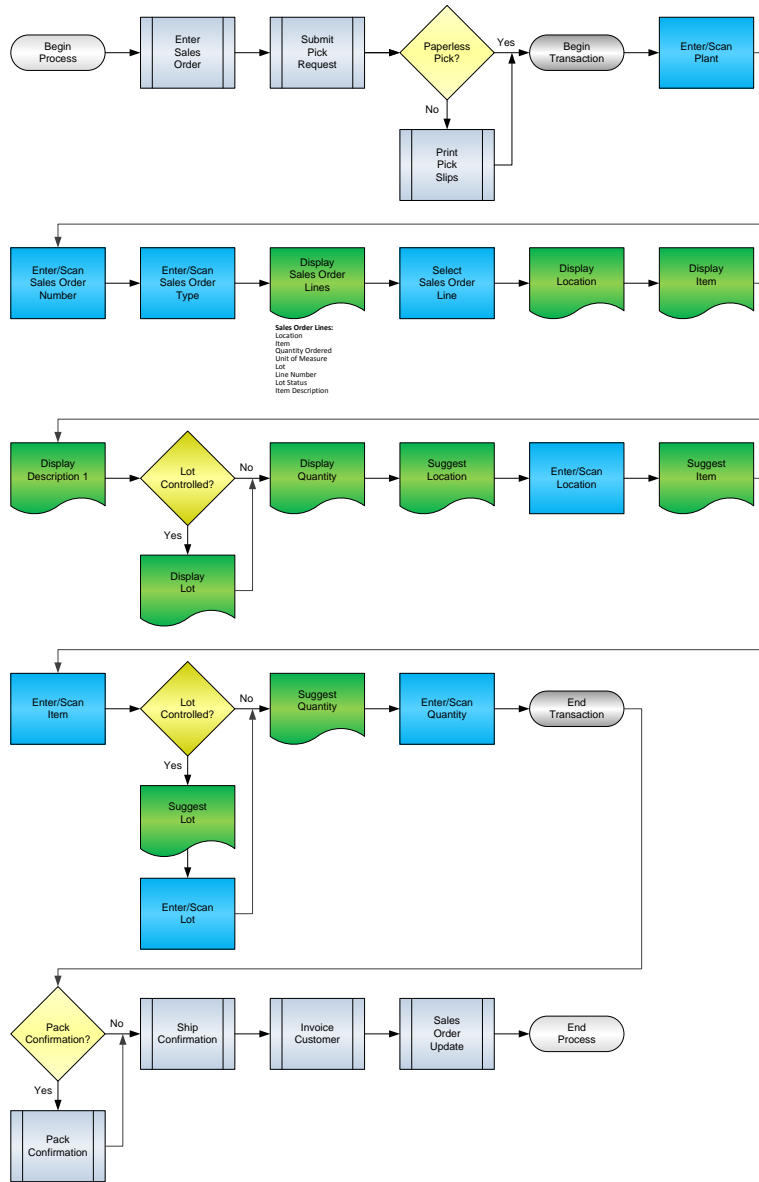


# SO Advanced Pick Confirmation



**RFgen Software**  
1101 Investment Boulevard, Suite 250  
El Dorado Hills, CA 95762  
888-426-3472

## License Agreement

All information contained in this document is the intellectual property of RFgen Software, a division of the DataMAX Software Group, Inc. This document may not be published, nor used without the prior written consent of RFgen Software. Use of the RFgen Software Open Source code is at all times subject to the DataMAX Software Group Open Source Licensing Agreement, which must be accepted at the time the source code is installed on your computer system. For your convenience, a text copy of the DataMAX Software Group Open Source Licensing Agreement is also loaded (and may be printed from) your RFgen-based system.

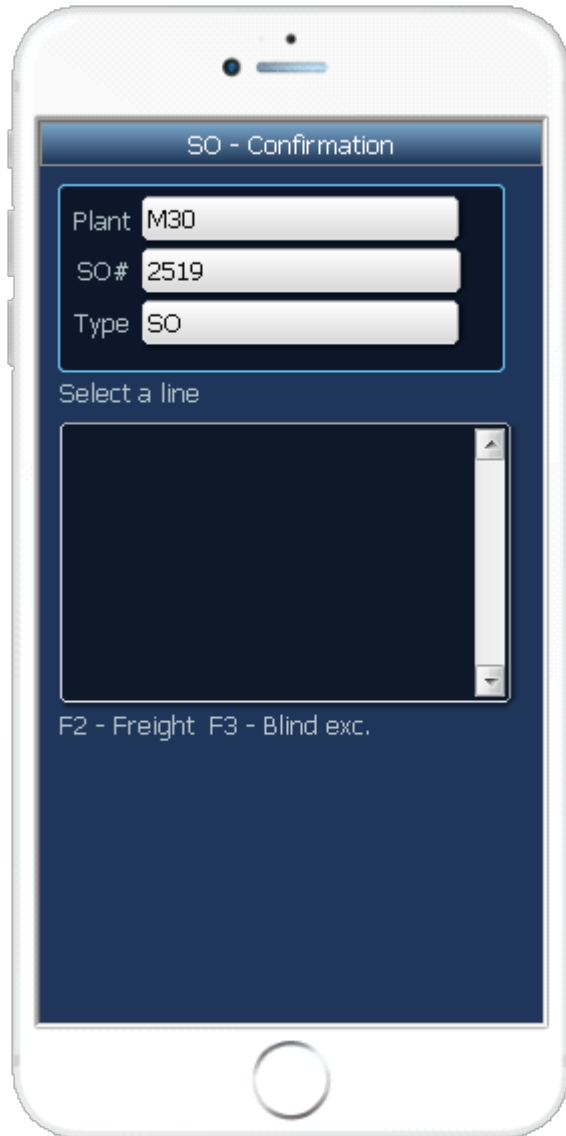
## Requirements

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

## Table of Contents

SO_ADVANCED_PICK_CONFIRMATION.....	1
FSOSC0100 – SO PICK CONFIRMATION.....	3
✓ VALIDATIONS .....	4
✓ EDITS .....	4
⇨ FUNCTION KEYS .....	4
CONSIDERATIONS .....	5
ENTERPRISEONE PROGRAMS – REFERENCE .....	6
ENTERPRISEONE SALES ORDER: P4201 .....	6
ENTERPRISEONE CARDEX:P4111 .....	6
HOW JDEEDWARDS® PROCESSING OPTION AFFECTS RFGEN.....	7
AFFECTED RFGEN FORMS AND TRANSACTION MACROS .....	7
SETUP AN RFGEN MENU .....	7
PROCESSING OPTIONS: P4205 SHIPMENT CONFIRMATION .....	8
BASIC TEST SCRIPT .....	11
TEST SCRIPT DESCRIPTION: ADV. PICK CONFIRMATION (P4205).....	12
RFGEN INPUT REQUIREMENTS .....	12
JD EDWARDS PROCESSING OPTION SETTINGS.....	12
EXECUTION PROCEDURES .....	13
OVERALL TEST CASE RESULTS .....	15

## FSOSC0100 – SO Pick Confirmation



This transaction identifies the items on Sales Orders at Pick status and displays the line items for the user confirm. The transaction will automatically confirm all lines with a 1 in the Option field. Click on each line to select or deselect the lines to be confirmed. The F3 key will pick confirm the lines selected and update the locations. Additionally, it updates the status of the items so that pack confirmation, or ship confirmation transactions can occur. Depending on EnterpriseOne processing options and Order Activity Rules, Inventory can be hard committed at Pick Confirmation, Pack Confirmation, or Ship Confirmation.

The following conditions apply to the RFgen implementation for the Pick Confirmation 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	F41001	CIMCU
Sales Order Number	F4201	SDDOCO
Item	F4211	SDLITM
Location	F41021	LILOCN
Lot	F4108	IOLOTN
Quantity	F41021	LIPQOH

## ✓ Edits

Condition	Table
Default Branch Plant	F40095
Quantity not greater than Quantity on Hand	F41021
Quantity entered <=0	NA

## ↔ 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 Pick Status transaction?
2. What processing options are set to process Pick Confirmation (i.e. Hard Commit)?
3. Are different document types and line types processed through Pick Confirmation?
4. Does Branch default based on user?
5. Will negative quantities be processed?
6. Is lot control used for items?
7. Is serialization used for items?

## EnterpriseOne Programs – Reference

Application Name(s)	Code	Table
Sales Order	P4201	NA
Item Ledger (Cardex)	P4111	F4111

### EnterpriseOne Sales Order: P4201

OK  Can...  New...  Dis...  Abo... Links ▾ AVB Inf...  OLE ...  Internet

**Detail Revisions** | **Line Defaults**

Order Number: 23192 SO 00001 Branch/Plant: 30  
 Sold To: 4242 Capital System Order Date: 6/1/2005  
 Ship To: 4242 Capital System Cust PO:  
 Currency: USD Exchange Rate: Base: USD  Foreign

Quantity Ordered	UoM	Secondary Quantity	Secondary UoM	Item Number	Ln Ty	Unit Price	Extended Price	Branch/Plan	Location	Last Status	Next Status	L Num
20	EA			210	S	798.0000	15,960.00	1 A .1	540	560		

### EnterpriseOne Cardex:P4111

Select  Find  Close  Seg...  New...  Dis...  Abo... Links ▾ Detail  OLE ...  Internet

Item Number: 210 Mountain Bike, Red  
 Branch/Plant: 30  
 Location: 1 A .1 Transaction Date: \* - \*  
 Lot/Serial: \* Document Type: \*  
 Quantity On Hand: 30 EA Value:  
 Secondary On Hand: EA

Document Number	Doc Type	Doc Co	Transaction Date	Branch/Plant	Quantity	Trans UoM	Secondary Transaction Qty	Secondary Trans UoM
23192	SO	00001	8/16/2005	30	20	EA		

## 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 - Pick Confirm	FSOPC0100	TSOPC0100
SO - Confirmation P4205	FSOSC0100	TSOSC0100
SO - Add Freight Line	FSOAL0100	TSOAL0100

### 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 “-Vers=” and the JDE Version.

Form/Menu	Description to Display
FSOPC0100 -Vers=ZJDE0001	Pick / Pack / Ship Confirm
FSOSC0100 -Vers=ZJDE0001 -OrderBy=sdlocn, sdlitm	Pick Confirm
FSOSC0100 -Vers=ZJDE0001 -OrderBy=sdlnid	Ship Confirm
SO – Add Freight Line is called from the Pick / Ship Confirm scripts regarding the JDE Processing Options.  If it has to run as a single script: FSOAL0100 -Vers=ZJDE0001	Add Freight Line



## Processing Options: P4205 Shipment Confirmation

---- <-- Selection -->

0001 1 1> **Next Status From (Required)** --> [555]

RFgen uses this value to filter on next Status (SDNXTR) Status from....

0002 1 2> **Next Status Thru (Required)** --> [560]

RFgen uses this value to filter on next Status (SDNXTR) Status to....

0003 1 3> Sales Order Type (Required) --> [ \* ]

---- <-- Defaults -->

0004 2 1> **Line Type for New Sales Detail Lines** --> [S]

Add Freight Line only: (FSOAL0100)

This value is used as Line type (SDLNTY), when a new line is created.

0005 2 3> Confirmed Sales Detail Lines --> [580]

0006 2 4> **Additional Non-inventory Line Items Ente** --> [580]

Add Freight Line only: (FSOAL0100)

This value is used as next Status (SDNXTR), when a new line is created.

0007 2 5> Remaining Backordered Quantities --> [580]

0008 2 6> Authorized Lines --> [ ]

0009 2 7> Settled Lines --> [ ]

---- <-- Display -->

0010 3 1> **Allow Additional Line Entry** --> [ ]

If "1" RFgen allows to call "Add Freight Line" (FSOAL0100)

0011 3 2> Display Kit Component Lines --> [ ]

0012 3 3> Display Text Lines --> [ ]

0013 3 4> Item Location Hold Error --> [1]

0014 3 5> **Pre-select Detail Lines for Confirmation** --> [1]

FSOSC0100 only:

When this Processing Option is blank the RFgen scripts enables confirmation in a line mode. All details need to be confirmed; typical use is SO Picking.

When this Processing Option is "1" the RFgen scripts enables to confirm in a blind execution mode. All lines will be confirmed as is. Typical use is SO Ship Confirm.

---- <-- Edits -->

0015 4 1> **Check Availability** --> [ 1 ]

RFgen calculates and validates the max qty. to Confirm regarding to this value.

0016 4 2> **Ship from Negative On-hand Quantity** --> [ 1 ]

RFgen calculates and validates the max qty. to Confirm based on this value.

0017 4 3> **Prevent Over-shipping** --> [ 1 ]

If "1" RFgen prevents to pick / ship more than ordered.

---- <-- Process -->

0018 5 1> **Override Line Type** --> [ ]

0019 5 2> **Override Ship To Address** --> [ ]

0020 5 3> **Backorder or Cancel Unshipped** --> [ 1 ]

If "1" RFgen creates a warning message when the User confirms less than line qty. If set to blank, the BSNF will split the line and the user can continue picking.

0021 5 4> **Relieve On Hand Inventory Override** --> [ ]

If "1" and RFgen Offline Inventory is switched off RFgen updates the Offline Inventory tables.

0022 5 5> **Ship and Debit Processing** --> [ ]

0023 5 6> **Sales Order Batch Price/Cost Update** --> [ ]

0024 5 7> **Display Warning/Error for Ascending Date** --> [ ]

0025 5 8> **Process New Lots for Credit Orders** --> [ ]

0026 5 9> **Enable Next Order Status Preference** --> [ 1 ]

---- <-- Freight -->

0027 6 1> **Freight Program (FUTURE)** --> [ ]

0028 6 2> **Override Freight (FUTURE)** --> [ ]

---- <-- Print -->

0029 7 1> **Subsystem Invoice (R42565)** --> [ ]

---- <-- Versions -->

0030 8 1> **Sales Order Entry (P4210)** --> [ ZJDE0022 ]

0031 8 2> **Print Invoices (R42565)** --> [ ]

0032 8 3> **Ship and Debit (R45100)** --> [ ]

0033 8 4> **Sales Order Batch Price/Cost Update (R42** --> [ ]

0034 8 5> **Carton Reorganization (P4620)** --> [ ZJDE0004 ]

---- <-- Warehouse -->

0035 9 1> **Pack Confirmation** --> [ ]

0036 9 2> **Pack Confirmation Version (P4216)** --> [ ]

---- <-- Quality -->

0037 10 1> **Test Results Revisions Version (P3711)** --> [ ]

0038 10 2> **Certificate of Analysis** --> [ ]

0039 10 3> **Certificate of Analysis Extract Version** --> [ ]

```

0040 10 4> Certificate of Analysis Subsystem          --> [ ]
0041 10 5> Evaluate Quality Tests                   --> [ ]

---- <-- Agreements -->
0042 11 1> Specify Borrow Agreement Destination     --> [ ]
0043 11 2> OR...                                     --> [ ]
0044 11 3> Agreement Search Method                  --> [ ]

---- <-- Interop -->
0045 12 1> Interoperability Transaction Type        --> [ ]
0046 12 2> Run the Outbound Subsystem UBE           --> [ ]

---- <-- Bulk -->
0047 13 1> Bulk Transaction Volumes                 --> [ ]

---- <-- InterBranc -->
0048 14 1> Enter the version for the Create          --> [ ]
0049 14 2> Call the Create Intercompany Sales Order --> [ ]

---- <-- Prepayment -->
0050 15 1> Prepayment Processing                     --> [ ]
0051 15 2> Process Authorization                    --> [ ]
0052 15 3> Process Settlement                       --> [ ]
0053 15 4> Authorize Prepayment Transaction         --> [ ]
0054 15 5> Settle Prepayment Transaction            --> [ ]
0055 15 6> Authorization Hold For Prepayment       --> [ ]
0056 15 7> Settlement Hold For Prepayment          --> [ ]

---- <-- Carton Det -->
0057 16 1> Shipment Confirmation Carton Status      --> [30]
0058 16 2> Reconcile Carton Detail to Shipment Deta --> [1]

```

## Basic Test Script

1. Record quantities on hand from the Item Ledger for the Branch Plants, Item Numbers and their associated lots and locations that you will perform the Pick Confirmation Issues on.
2. Create and document the following scenarios:
  - a. Attempt to select an item for pick confirmation that is not at the proper status. An error message should appear.
  - b. Attempt to transact on items that are not set up in particular branch plants.
  - c. Select Sales Orders eligible for Ship Confirmation and process through RFgen. Test for over shipment of items if allowed.
3. Review the Sales Order Table for status updates and the Item Ledger for the proper document types, transaction records, and that the quantity on hand updates the correct amounts on processed transactions.

## Test Script Description: Adv. Pick Confirmation (P4205)

### RFgen Input Requirements

Before you begin testing, ensure, for the combination of branch/plant(s) and item(s) 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 pick confirmation
- e. An order activity status for non-inventory line items

### 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
Selection	<ol style="list-style-type: none"> <li>a. Next Status From (Required)</li> <li>b. Next Status Thru (Required)</li> </ol>	
Defaults	<ol style="list-style-type: none"> <li>a. Line Type for New Sales Detail Lines</li> <li>b. Add'l Non-inventory Line Items Entered</li> </ol>	
Display	<ol style="list-style-type: none"> <li>a. Allow Additional Line Entry</li> <li>b. Pre-select Detail Lines for Confirmation</li> </ol>	
Edits	<ol style="list-style-type: none"> <li>a. Check Availability</li> <li>b. Ship from Negative On-hand Quantity</li> <li>c. Prevent Over-shipping</li> </ol>	
Process	<ol style="list-style-type: none"> <li>a. Backorder or Cancel Unshipped Quantity</li> <li>b. Relieve On Hand Inventory Override</li> </ol>	

## Execution Procedures

ID	Test Case	Expected Result	Pass	Fail
1	Type in a valid Branch/Plant _____ Press the <b>ENTER</b> key	RFGEN will validate and accept the branch/plant entered.		
2	Type in a valid Sales Order# _____ Press the <b>ENTER</b> key	RFGEN will validate and accept the sales order number entered.		
3	Type in a valid Item# ____ for the order Press the <b>ENTER</b> key	RFGEN will validate and accept the item entered		
4	Type in a valid locn _____ for the item Press the <b>ENTER</b> key	RFGEN will validate and accept the location entered		
5	Type in a valid order qty _____ for the item	RFGEN will validate and accept the quantity entered		
6	Type in an invalid Branch/Plant _____ Press the <b>ENTER</b> key	RFGEN will validate the branch/plant entered and display an error message – the field will continue to error out until corrected		
7	Type in an invalid Item# ____ for the order Press the <b>ENTER</b> key	RFGEN will validate and display an error message – the field will continue to error out until corrected		
8	Type in an invalid locn _____ Press the <b>ENTER</b> key	RFGEN will validate and display an error message – the field will continue to error out until corrected		
9	Type in and invalid order qty _____ for the item	RFGEN will validate and display an error message – the field will continue to error out until corrected		
10	Press the “F1” key with the cursor in the branch/plant field	RFGEN will display a list of branch/plants		
11	Press the “F1” key with the cursor in the branch/plant field to select and return a branch/plant to the branch/plant field	RFGEN will display a list of branch/plants and when selected, the branch/plant will be returned		
12	Press the “F1” key with the cursor in the item# field	RFGEN will display a list of items for the order		
13	Press the “F1” key with the cursor in the locn field	RFGEN will display a list of locations for the item		
14	Press the “F1” key with the cursor in the locn field to select and return a location to the locn field	RFGEN will display a list of locations for the item and when selected, the item will be returned		
15	Press the “F1” key with the cursor in the item# field to select and return an item to	RFGEN will display a list of items for the order and when selected, the		

	the item# field	item will be returned		
16	If the Next Status From correctly matches the Order Activity Rules for the order/line type	RFGEN will include the order for processing		
17	If the Next Status From incorrectly matches the Order Activity Rules for the order/line type	RFGEN will not include the order for processing		
18	If the Relieve the On Hand Override processing option is set to "1"	RFGEN will not relieve on hand inventory—the order will advance to the "Next Status To" in the processing options		
19	If the Relieve the On Hand Override processing option is set to "blank"	RFGEN will relieve on hand inventory—the order will advance to the "Next Status To" in the processing options		
20	If the Additional Non-Inventory Line Items Entered is activated and the Allow Additional Line Item Entry is set to "1"	(See the "Add Freight Line" test script)		
21	If the Additional Non-Inventory Line Items Entered is deactivated and the Allow Additional Line Item Entry is set to "blank"	(See the "Add Freight Line" test script)		
22	If the Pre-Select Detail Lines for Confirmation processing is set to "1"	RFGEN will automatically select the detail line for confirmation		
23	If the Pre-Select Detail Lines for Confirmation processing is set to "blank"	RFGEN will not automatically select the detail line for confirmation		
24	If the Check Availability processing option is set to "1"	RFGEN will perform availability checking and display a notification message and allow the transaction to continue		
25	If the Check Availability processing option is set to "blank"	RFGEN will perform availability checking—a notification message will not be displayed		
26	If the Ship from Negative On-Hand Quantity processing option is set to "1"	RFGEN will not allow confirmation of the detail the line		
27	If the Ship from Negative On-Hand Quantity processing option is set to "blank"	RFGEN will allow confirmation of the detail the line		
28	If the Prevent Over-Shipping processing option is set to "1"	RFGEN allows the increase in quantity of an order detail line during confirmation		
29	If the Prevent Over-Shipping processing option is set to "blank"	RFGEN disallows the increase in quantity of an order detail line during confirmation		

30	If the Backorder or Cancel Unshipped Quantity processing option is set to "1"	RFGEN will allow backorder or cancel of an unshipped quantity		
31	If the Backorder or Cancel Unshipped Quantity processing option is set to "1"	RFGEN will disallow backorder or cancel of an unshipped quantity		
32	At the RFGEN "Enter to Accept Prompt" the transaction is added to EnterpriseOne	Confirm the pick confirmation results		

## Overall Test Case Results

<b>Pass/Fail</b>	
<b>Tester/Date</b>	
<b>RE-Tester/Date</b>	

<b>Actual Results</b>	
-----------------------	--

<b>Comments</b>	
-----------------	--