**Business Requirement:**

During Hot Market, our customers may request that their shipping carrier be modified on an order-by-order basis.   To do so, customer service modifies the Customer Group 2 value at the sales order header.   If they are changing the carrier (for example, from FedEx to UPS), they also need to modify the account which is held in the Header-Texts.

Many times, due to the urgency of the order, this step is missed, and deliveries are sent to Menlo with a mismatch between carrier and account. Once this is identified, the delivery must be deleted, the sales order updated, and a new delivery created and sent to the distribution centre. This causes delays in shipping to our customers during these critical shipping periods.

**Functional Specification:**

When sales orders are saved, a user-exit should trigger which determines if there is a match between the carrier, incoterms, and the account number on the document. If there is a mismatch, the sales order should be marked incomplete so that a subsequent delivery cannot be created until the mismatch is resolved.

This user-exit should trigger an incompletion in the following scenarios:

1. Incoterm is TPB and missing Account # in text
2. Incoterm is TPB and Carrier (Cust. Grp. 2) does not match Account # length in text field (\*\* **Note** – incompletion should only trigger if carrier code is maintained in custom table below)
3. Incoterm is PPI and Account # is showing in text field

A custom table will be required to map the carrier codes to the appropriate length of the account number for scenario 2. Example entries below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Cust. Grp. 2** | **Carrier** | **Description** | **Acct. # Length** |
| 059 | FedEx | 2 Day Air | 9 |
| 060 | FedEx | 3 Day Air | 9 |
| 061 | FedEx | FedEx First Overnight | 9 |
| 062 | FedEx | Ground | 9 |
| 063 | FedEx | International 3 Day | 9 |
| 064 | FedEx | International 5 Day | 9 |
| 066 | FedEx | International Next Flight | 9 |
| 067 | FedEx | FedEx Priority | 9 |
| 068 | FedEx | Saturday | 9 |
| 069 | FedEx | Standard | 9 |
| 195 | UPS | 2 Day Air AM | 6 |
| 196 | UPS | 2 Day Air | 6 |
| 197 | UPS | 3 Day Air | 6 |
| 198 | UPS | Ground | 6 |
| 199 | UPS | International 3 Day | 6 |
| 200 | UPS | International 5 Day | 6 |
| 201 | UPS | International 7 Day | 6 |
| 202 | UPS | Next Day AM | 6 |
| 203 | UPS | Next Day Air | 6 |
| 204 | UPS | Next Day Air | 6 |
| 205 | UPS | Next Day Saver | 6 |
| 206 | UPS | Saturday | 6 |
| 207 | UPS | UPS Sonic Air | 6 |

**Assumptions:**

* Incompletion will display in standard report V.02

**Known Issues:**

* None

**Technical Specification:**

| Technical Object | Type | Description |
| --- | --- | --- |
|  |  |  |
|  |  |  |

**Source Control:**

| Change Object | Application | Developer | Description |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |

**TDMS Requirements:**

Is a new TDMS client required? No

**Test Scenarios:**

| No. | Test Scenario | Expected Results | Actual Results | Application / Environment | Tester | Creation  Date | P/F | Panaya |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1 | Create sales order with Incoterms not equal to PPI or TPB | No incompletion should trigger |  | NECNEQ-600 |  |  |  |  |
| 2 | Create a sales order with Incoterms PPI and no account # in text field | No incompletion should trigger |  | NECNEQ-600 |  |  |  |  |
| 3 | Create a sales order with Incoterms PPI and account # in text field | Incompletion should trigger |  | NECNEQ-600 |  |  |  |  |
| 4 | Create a sales order with Incoterms TPB for carrier not contained in custom table | No incompletion should trigger |  | NECNEQ-600 |  |  |  |  |
| 5 | Create a sales order with Incoterms TPB and a match in custom table | No incompletion should trigger |  | NECNEQ-600 |  |  |  |  |
| 6 | Create a sales orders with Incoterms TPB, a carrier entry in the custom table, and no account # in the text field | Incompletion should trigger |  | NECNEQ-600 |  |  |  |  |
| 7 | Create a sales order with Incoterms TPB, a carrier entry in the custom table, and a mismatched account # in the text field | Incompletion should trigger |  | NECNEQ-600 |  |  |  |  |
| 8 | Update incomplete sales order (modify account # text to match carrier code) | Incompletion should be removed |  | NECNEQ-600 |  |  |  |  |

**Panaya Scripts:**

| No. | Panaya Script | Test No. | Tester | Description |
| --- | --- | --- | --- | --- |
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**uPerform / Camtasia:**

| No. | uPerform Script | Creation Date | Language | Description |
| --- | --- | --- | --- | --- |
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