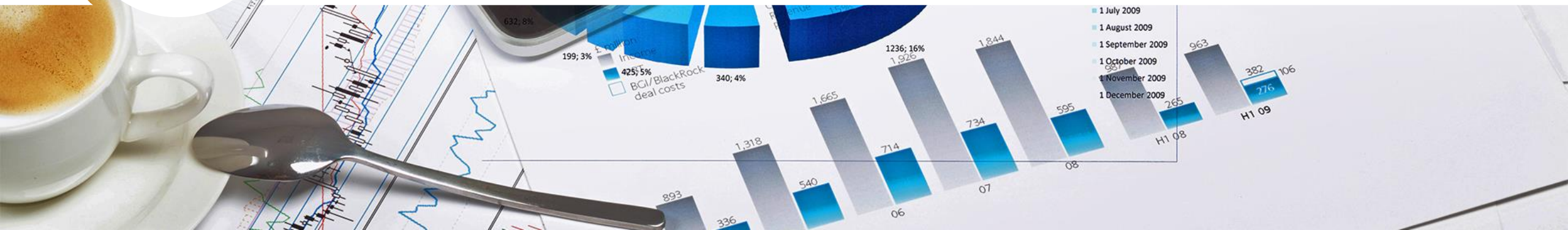




Priority ERP Hints & Tips

Fode Sylla & Dan Murray

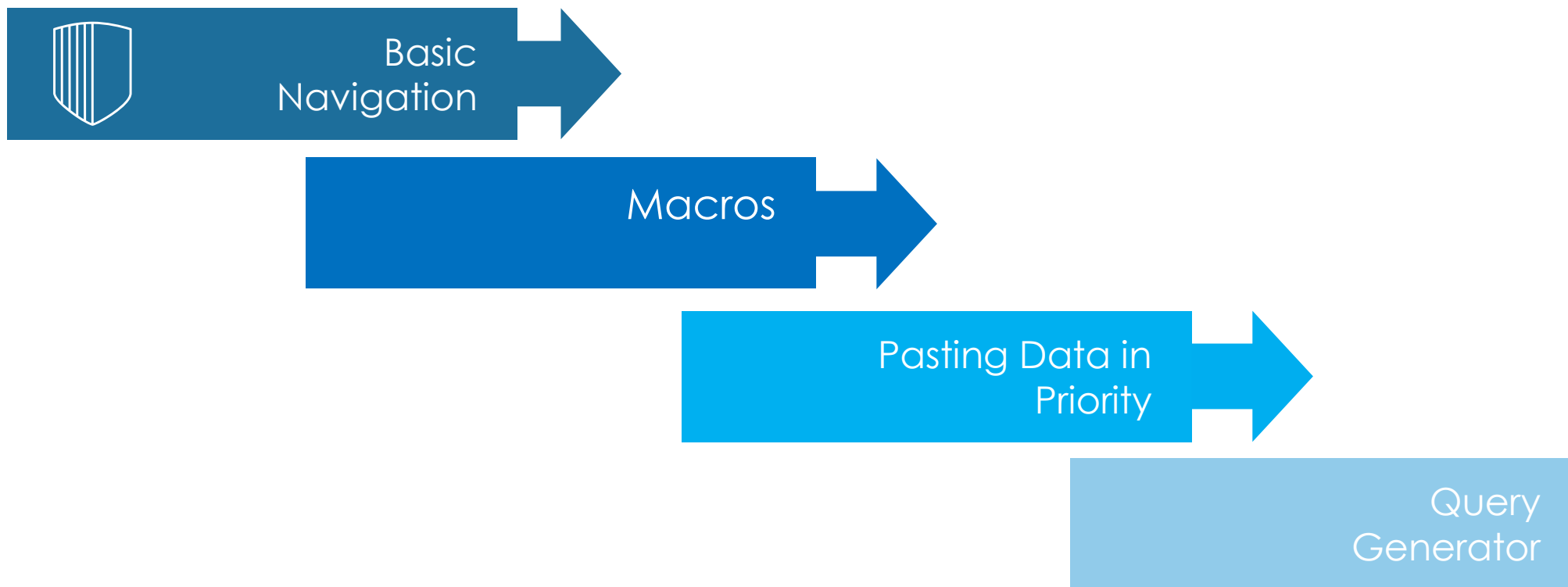


Presentation Agenda

Hints & Tips



What you've missed





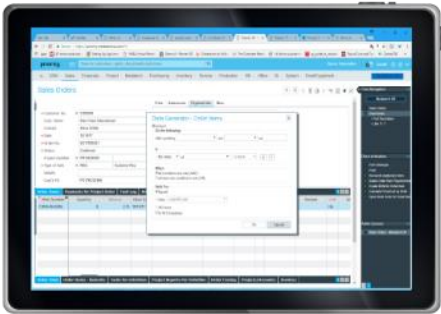
Data Generator

Reducing manual entry

Increase efficiency

Reduce human error

Data Generator



After
What triggers the Generator?

Action
What Action should it take?

If
What conditions should it check for?

For Who
Who should it run for?

Business Rules Generator - Sales Orders

Rule Number Rule Description Active?

Do the following:

to

Subject

Message

Attach document using print format

PDF ? Attachments?

If

of

of

of

When

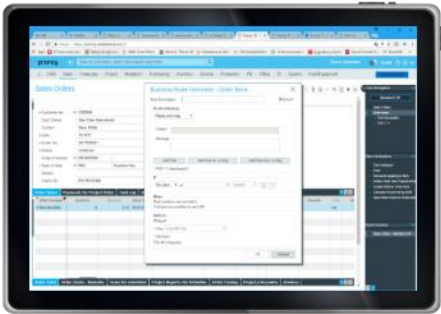
all conditions are met (AND)

Business Rules

Data entry communication

Data control / validation

Business Rules



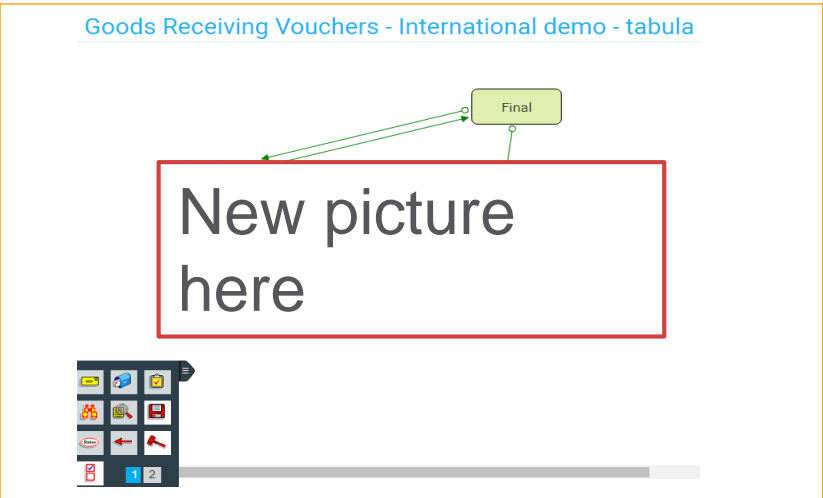
Action
What should it do?

Message
What should the message text be?

If
What conditions should it check for?

For Who
Who should it run for?

BPM Flowchart



Create a form status process

Define rules for Final

Rule Number 40206 Rule Description Email QA when GRV finalised Active?

When

- The document reaches this status
- The document remains in this status longer than 0 minutes
- The date in the Date fell 0 minutes ago

Do the following:

Send e-mail to user John Smith

Subject New GRV finalised, please check goods

Message GRV <<Document>> is now final, please check the goods

Attach document Print GRV using print format Standard Format

PDF Attachments?

If the value of Status is equal to Final

This screenshot shows the configuration for a rule named 'Define rules for Final'. The rule number is 40206 and the description is 'Email QA when GRV finalised'. The rule is active. The 'When' section has three options, with the first selected. The 'Do the following' section is configured to send an email to 'user John Smith' with the subject 'New GRV finalised, please check goods' and the message 'GRV <<Document>> is now final, please check the goods'. The rule is triggered when the status is equal to 'Final'.

Form status communication

Define rules for Open

Rule Number 40205 Rule Description Move frm Open to Released after 1 day Active?

When

- The document reaches this status
- The document remains in this status longer than 1 days
- The date in the Begin Production fell 0 minutes ago

Do the following:

Change status to Released

This screenshot shows the configuration for a rule named 'Define rules for Open'. The rule number is 40205 and the description is 'Move frm Open to Released after 1 day'. The rule is active. The 'When' section has three options, with the second selected. The 'Do the following' section is configured to change the status to 'Released'.

Define status properties and rules