Sales Order Validation

- Validation, Approval, Allocation, Release
  - Customizations (except Approval)
- Status section of SO

Validation

- When an order is entered, Validation Status will be Pending and the "Order Validation Scheduled" checkbox is checked by default.
- Once an order is saved, the validation script runs every 30 mins.
- Validation can be run on demand by hitting the Validate Order button while in view mode on the SO.
- Validation has 4 tests
  - Required Multiples
  - Address Validation
  - Item Exclusivity/Restrictions
  - Price Variance
- Required Multiples
  - Only checking for base UOM (base unit on item record) at this time.
  - Checkbox on customer record whether a customer can order the base UOM.
  - If the checkbox is NOT checked, the validation will fail if the sales order qty is not a multiple of the Sales Order Multiple from the item record.
- Address Validation
  - Checks for a variation of PO box.
  - We are paying one cent per full address validation through ShipHawk.
- Item Exclusivity/Restrictions
  - Lists can be found on the item record or customer record (Sales & Marketing subtab).
  - Can add by selecting the New ADV – Exclusivity/Restriction (view mode) or enter via inline edit (edit mode).
    - Cannot add date ranges if using edit mode.
  - Either the item or customer will populate automatically based on the screen.
  - Need to upload the current listings. Who would have these?
- Price Variance

- - - Checks the PO Unit Price against the System Price
  - Rounding and Min/Max exceptions
    - Threshold managed by Marketing on the customer record
    - .005 exception
    - Min price exception
- Validation Status
  - Pending
  - Failed
  - Passed
  - NA
- Results
  - Field on SO line
  - Order Validation Status subtab on SO
  - C/S Dashboard
    - Report can be inline edited
  - Marketing Dashboard
    - Report can be inline edited
- Actions
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