User Guide

Intelligent Order Routing

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1.   ABOUT

The Intelligent Order Routing app allows users to assign or update the fulfillment location of Sales Orders. With this app, users can enable various filters to determine the Sales Orders they wish to update. Users can filter by Sales Order, Sales Order Line, Item, and Customer. Updates can be run simultaneously for multiple Sales Orders.

For more information, please go to https://www.websan.com/intelligent-order-routing .

2. BASIC SETUP

This section covers the basic system setup needed to assign or update Sales Orders' fulfillment centers. These steps should be completed prior to using the Intelligent Order Routing application.

First, search for Intelligent Order Routing Setup.

intelligent order routing setup

Go to Pages and Tasks

> Intelligent Order Routing Setup   Administration

In the window that appears, activate or deactivate configuration settings as needed.

Intelligent Order Routing Setup

Configurations

Route Released Orders ·· 🔵   Allow Orders to Cross... · ⚪

Show Warning on Up... · ⚪   Show Warning on Cro... · ⚪

Skip If Item No Invent... · ⚪

The configuration settings of this application allow users to:

- Route Released Orders – Decide if released Sales Orders may be updated.

- Show Warning on Update – Enable warnings to alert users when released Sales Orders are updated.

- Skip If Item No Inventory – Prevent the update of Sales Orders when there is not enough inventory is at the new location.

- Allow Orders to Cross Borders – Prevent the update of locations that require the crossing of international borders.

- Show Warning on Crossing Borders – Enable warnings to alert when an update requires the crossing of international borders.

3.   FUNCTIONALITY

Updating Sales Order Routing

The Intelligent Order Routing app allows users to assign and update Sales Orders' fulfillment centers. Assignments / updates can be applied at a Sales Order level, or by Sales Order line, Item, or Customer.

To update a Sales Order, search for Sales Orders.

In the Sales Orders window, expand the Actions drop-drown menu, then select Intelligent Order Routing.

In the Intelligent Order Routing window, select New to create a new filter rule.

The Intelligent Order Routing Card will appear. In this window, users can set up filter rules to specify the Sales Orders that must be updated, and how. In the Intelligent Order Routing Card:

i.   Start by completing the General section.

Intelligent Order Routing Card

General

Priority	10	New Location	NORTH ⌄
Action	Update ⌄	Use On-hand + Relea…	⬤
Description	As requested by client -		

First, users must enter a Priority value – this is a required field. When more than one filter rule is created, rules' Priority values are used to determine the order in which these will be executed. Multiples of 10 must be entered in ascending order; a filter rule with a priority of 10 will take precedence over a priority of 20, a priority of 20 will supersede 30, and so on.

Note that the same Priority value can not be assigned to two filter rules. When two or more filter rules are executed together, updates will first be applied to all eligible items based on the criteria specified in the rule with the highest priority. The rule will with the second highest Priority will be applied on the remaining items, and so on.

Next, expand the Action drop-down list to choose if the rule will update or exclude Sales Orders. Note that exhaustive filters can be applied by using single or combined Update and Filter rules. Then, expand the New Location drop-down list to choose a New Location.

ii.   Next, select the Filter and Filter Attribute that will be used in this rule.

Filter

Source	Sales Order ⌄	Filter Attribute	SELL-TO CUSTOMER NO.

Filter Attributes

Customer Attributes	⌄	Sales Header Attributes	SELL-TO CUSTOMER NO. ⌄
Item Attributes	⌄	Sales Line Attributes	⌄

In the Filter section, expand the Source drop-down list to assign a filter source. Users may choose to filter by Sales Order, Sales Order line, Item, or Customer. Based on the user's Filter Source selection, the corresponding field will be enabled in the Filter Attributes section - users must choose a Filter Attribute to proceed. The Filter Attribute field in the Filter section will populate automatically.

iii.   In the Calculation section, specify the logic and value(s) that your rule will follow.

Calculation

Calculation Method · · · · ·	= ⌄	Value 2 · · · · · · · · · · · · ·
Value · · · · · · · · · · · · · ·	10000	

Expand the Calculation Method drop-down list to choose appropriate logic for your rule, then, populate the Value field accordingly. Users may choose to populate both the Value and Value 2 fields if needed. At least one of these fields must be populated.

The rule setup process is complete, repeat steps i through iii to create additional rules as needed.

Intelligent Order Routing

🔍 Search	➕ New	Manage	📑 Execute	🗐 Log	More options	

Priority		Source	Filter Attribute	Calculation	Value	Action	New Location
10	⋮	Sales Order	SELL-TO CUSTOMER ... =		20000	Update	WEST
20		Customer	NAME	Contains	School	Update	WEST

Next, go back to the Intelligent Order Routing window. Here, users can manage rules and update Sales Order. Users may Edit, View, or Delete a rule by selecting it, then expanding the Manage menu, and choosing the corresponding option.
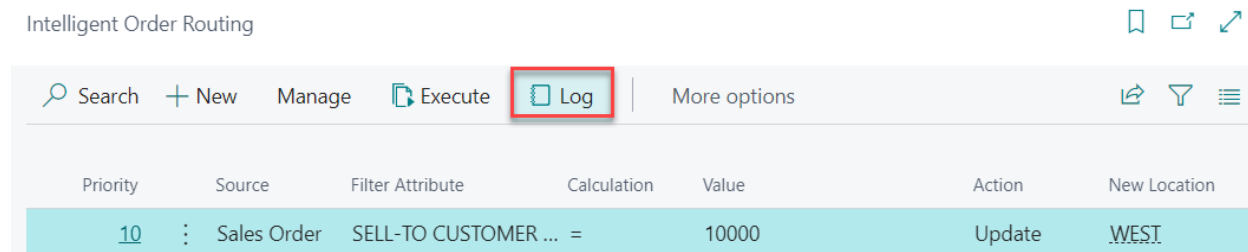
After all the necessary rule filters are set up, click Execute to run the update.

4. REPORTING

The Intelligent Order Routing app stores a log of update executions. Users may choose to filter log entries in Business Central or download the entries as an Excel file to perform a more thorough analysis.

Accessing Sales Orders Update Log

To access the Sales Orders Routing Log, in the Intelligent Order Routing window, select Log.

The Intelligent Order Routing Log window will appear.

In this window, users will find a list of all the updates that have been performed in the past. This list includes key information fields like Execution ID, Priority, Description, and the Order Number to which updates were applied. Filters can be applied to this table.

To download this report as an Excel file, clicking the Share button, and then choose Open in Excel.
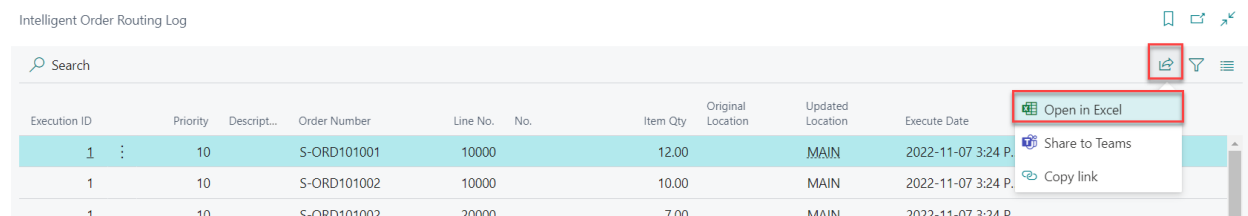
5.   SECURITY

The Item Attributes for Dynamics 365 App, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in AutoPermission security functionality. When a user with the proper credentials installs an App, the AutoPermission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the AutoPermission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

To change user permissions, search and go to the User list.
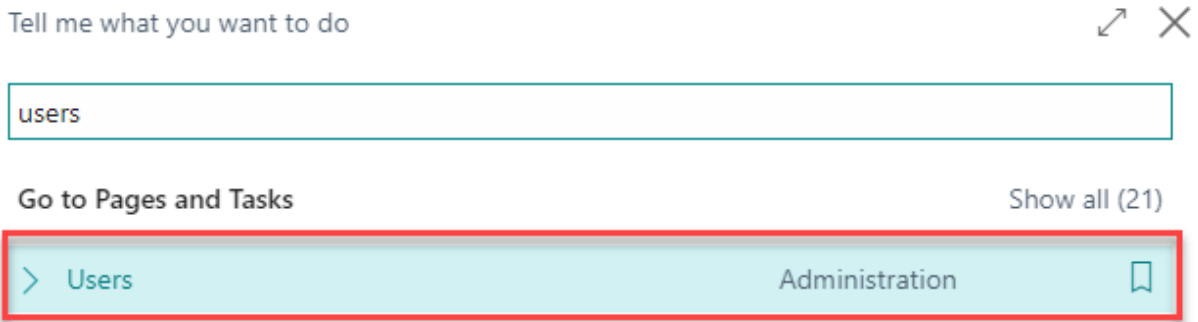
In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.
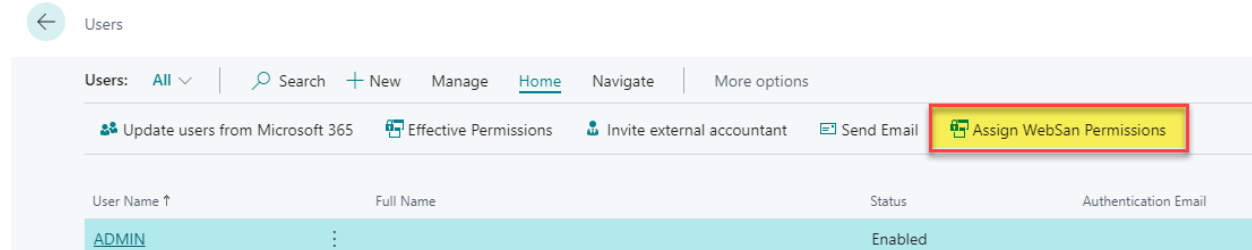
6.   REGISTRATION

To register a WebSan Inc.'s application, in Business Central, search WebSan Client Information and select WebSan Client Information – Administration.

In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.