



Using Custom Fields in Order Processing

Custom Field

Display Name:

Description:

Token Name:

Default Value:

Print on WO Traveler

Print on COC

Process Unique

Required in Order Entry

1.0 Required Thickness

Answer: * 1.0000 - 3.5 mils

Operator:

Date:

[INSTRUCTIONS](#)



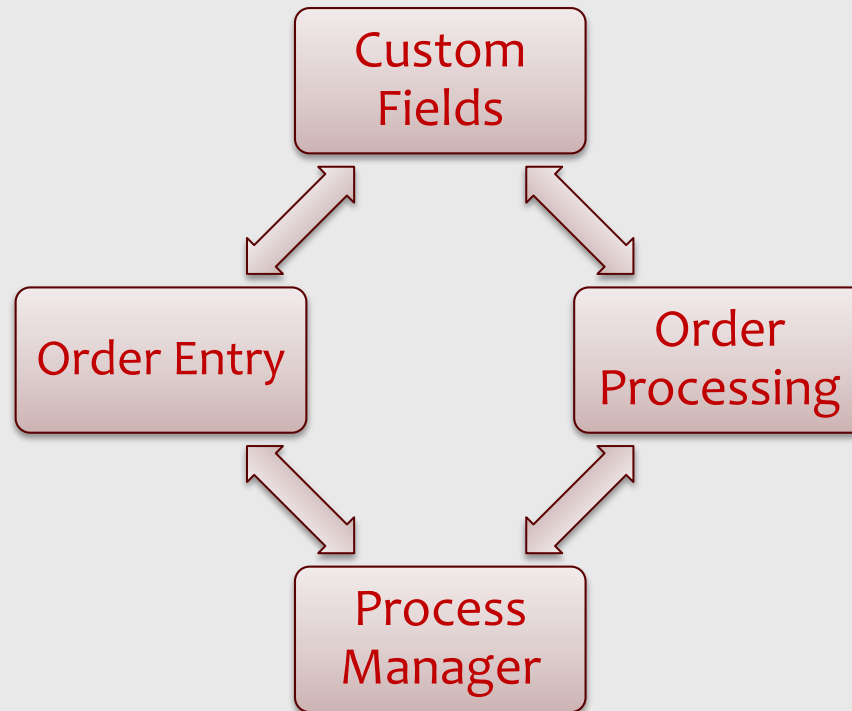
Summary

The following configuration enables Users to manage and populate Process Answer fields from the Order entry dialog. This feature allows Sales or Planning to communicate processing requirements (to Operators) via Custom Fields in Order Entry, rather than creating unique processes for each possible plating thickness callout. The workflow can also be used to flow-down Paint and Coating Colors, Types, Classes, Manufacturers, or any other Process Control Data.



Configuration

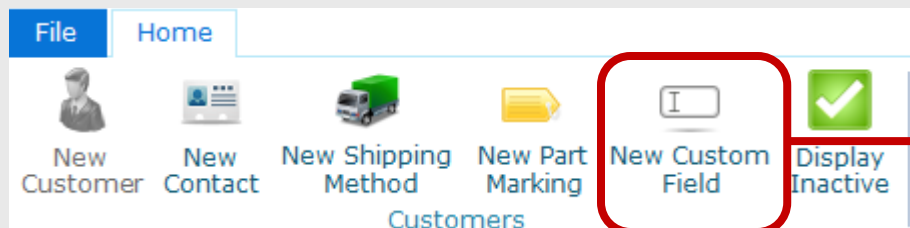
Successful Implementation of Custom Fields in Order Processing will be reliant upon four separate DWOS Dialogs





Custom Fields

To begin, users will need to add Custom Fields from the Customer Manager. This can be accomplished for a single Customer by selecting the Customer followed by the 'New Custom Field' Icon. If the desire is to add fields to ALL Customers, select the 'Customers' node at the top of the Customer list, followed by the 'New Custom Field' button.

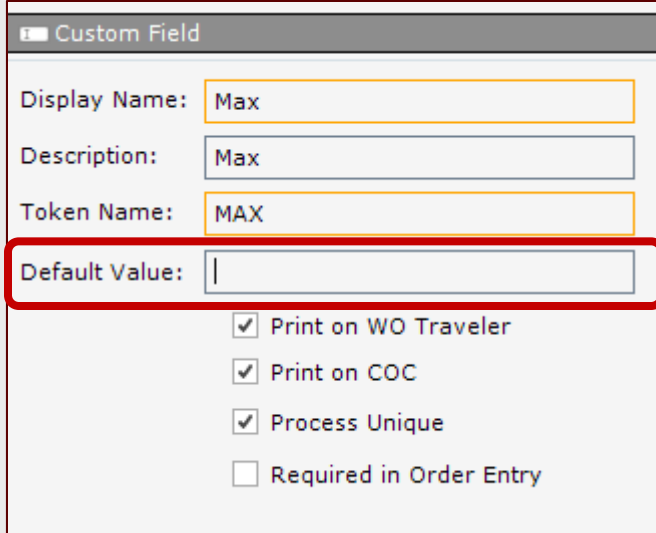


Display Name:	Max
Description:	Max
Token Name:	MAX
Default Value:	
<input checked="" type="checkbox"/>	Print on WO Traveler
<input checked="" type="checkbox"/>	Print on COC
<input checked="" type="checkbox"/>	Process Unique
<input type="checkbox"/>	Required in Order Entry

DWDS

Default Values

- You'll notice there is now a 'Default Value' dialog box for each Custom Field. Default Values may also be used independently, without the linked Order Processing workflow.
- Also new to 17.1 is 'Process Unique' Selecting 'Process Unique' will allow Order Processing Answers to linked to a Custom Field.
- Just like traditional Custom Fields, these will be added to the Order Entry dialog for selected or all Customers.
- After creating Custom Fields for data to link to Order Processing, the fields will need to be linked to select Order Processing Questions through the use of 'Tokens'



Custom Field

Display Name: Max

Description: Max

Token Name: MAX

Default Value: |

Print on WO Traveler

Print on COC

Process Unique

Required in Order Entry



Custom Field Tokens

Also new to the Process Manager is a dropdown menu on the left side of the Answer, Min Value, Max Value, and Tolerance Fields. Opening this menu will display a list of all Custom Field Tokens available to connect to the Order Processing dialog. After

selecting a token, the Token menu will turn green to indicate it is linked to a Custom Field (Token). Remember, to use a Custom Field Token in Order Processing, 'PROCESS UNIQUE' must be checked in the DWOS Customer Manager.

Process Step Question

Order: 1.0 Operator Editable Required

Question: Required Thickness

Input Type: Decimal List: + <None>

Answer: []

Min Value: [] 1.0000

Max Value: [] 5.0000

Tolerance (+/-): Token - MAX

Units: MAX

- MAX
- ATLASFIELD
- DETAILEDDESCRIPTION
- FIELD2
- LOCATION#
- LOT#
- MAJOR
- MAXTHICK

Instructions:



Custom Fields

Name to be displayed in Order Entry

Custom Field description

Part Mark Token Name

Custom Field Default Value

Select 'Process Unique' to use Custom field in Order Processing answers



Process Manager

Connect Custom Fields to Process Questions by selecting from the dropdown menu.

The 'Token Icon' will turn green when a Custom Field is successfully linked.

The screenshot shows the 'Process Manager' application. On the left is a tree view of processes, including '3" E-Coat Mono-Rail', 'Blasting', 'Chemfilm', 'Chem-Process', 'Chrome', '5DEC - <None>', 'Chrome 1A - <None>', '1.0 - Thickness', '1.0 - Coatin', 'OE-NPU - <None>', 'OE-PU - <None>', 'P/U-UNC - <None>', 'Hardcoat', 'Line A', 'Masking', 'NDT', 'Outside Processing', 'Paint', 'Part Marking', 'QA', 'Sales', 'Shipping', 'Sulfuric Anodize', and 'Top Coat'. The main area displays the details for a 'Process Step Question' with the following fields:

Order:	1.0	<input checked="" type="checkbox"/> Operator Editable	<input checked="" type="checkbox"/> Required
Question:	Coating Thickness		
Input Type:	Decimal	List:	+ <None>
Answer:	2.0		
Min Value:			1.0000 *
Max Value:			5.0000 *
Tolerance (+/-):			
Units:	+ mils		
Instructions:	Measure Coating Thickness using approved, calibrated device.		

This is a close-up of the 'Process Step Question' dialog box. The 'Max Value' field is highlighted with a red box and contains a green token icon. A red arrow points from this token icon to the 'Units' dropdown menu, which is also open. The dropdown menu shows a list of options: 'MAX' (with a red 'X' icon), 'MAX', 'ATLASFIELD', 'DETAILEDDESCRIPTION', 'FIELD2', 'LOCATION#', 'LOT#', 'MAJOR', and 'MAXTHICK'.



Order Entry

Work Order

Work Order: 14335 Order Date: 03/27/2017

Est. Ship: 03/01/2017 Req. Date: 03/01/2017

Customer: Florida Platers Inc.

Customer WO: PO Number:

Priority: Normal Invoice:

Status: Open Comp. Date:

Entered By: Nate Wells-123456

Documents: PO 38938

Min: 1

Max: 5

Part: 123-4

When creating a new Order, Users will have the ability to enter values in the (process-connected) Custom Fields. If the associated Process answers **DO NOT** need modified, the original Order Processing parameters, answers, or values will be used during Order Processing.



Order Processing

After entering desired values in connected Custom Fields, Question answers or answer parameters will be reflected in the associated Order Processing Question.

The screenshot shows the 'Order Processing' application window. It is divided into several sections:

- Order Information:** Work Order: 14335, Customer: Florida Platers Inc., Start Date: 3/27/2017, Required: 3/1/2017.
- Part Information:** Part: 123-4, Material: 2024, Quantity: 5.
- Process:** Chrome 1A.
- Custom Fields:** A list on the left includes '1.0 - Thickness'.
- 1.0 Thickness (Chrome):** A section with a yellow header containing 'Required Coating Thickness.' and a dropdown menu showing 'SPS 9.0.028 REV F.pdf'.
- 1.0 Required Thickness:** A section highlighted with a red box, containing:
 - Answer: 0.00000 mils (with a red asterisk and '1.0000 - 5 mils' next to it)
 - Operator: Nate Wells-123456
 - Date: 04/04/2017 09:59 AM
 - Buttons: 'Next >>' and 'INSTRUCTIONS'

At the bottom, there are 'OK' and 'Cancel' buttons, and a status bar showing 'Chrome', 'Nate Wells-123456', 'Paperless Mode', and '0/1'.

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Contact DS2 at
850-389-8375 for
additional support.