User Manual
Release Pro

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User Manual

Release Pro

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1 PREMISE

This document is a user guide for Release Pro App.

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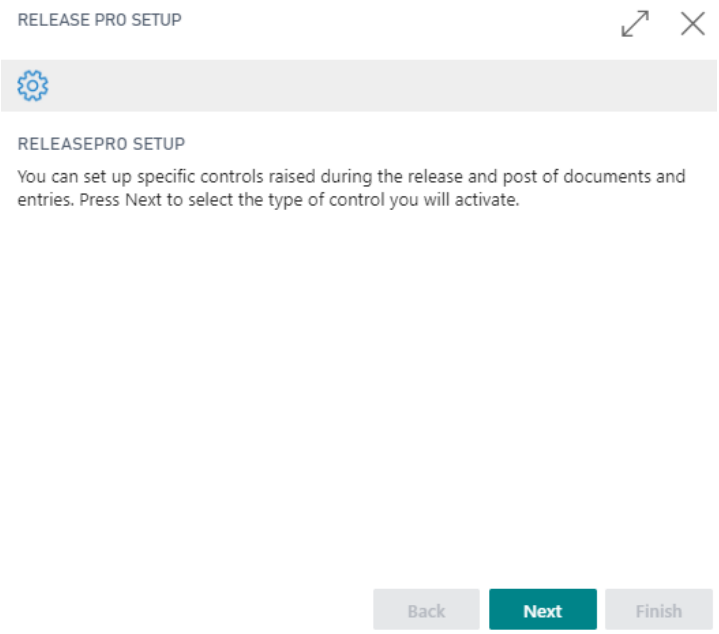
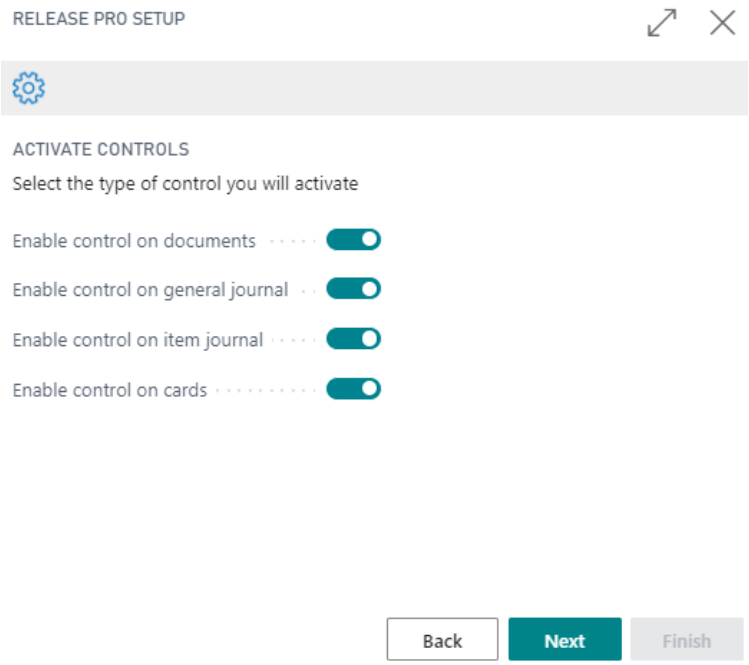
2 INSTALL RELEASE PRO SETUP

2.1 Assisted Setup

To set controls on the tables, is necessary to enable the ReleasePro extension.
Open the Assisted Setup and choose the Release Setup item.
The system will open the assisted guide to install the extension.



Select the flags for the control to activate.



Click Next.

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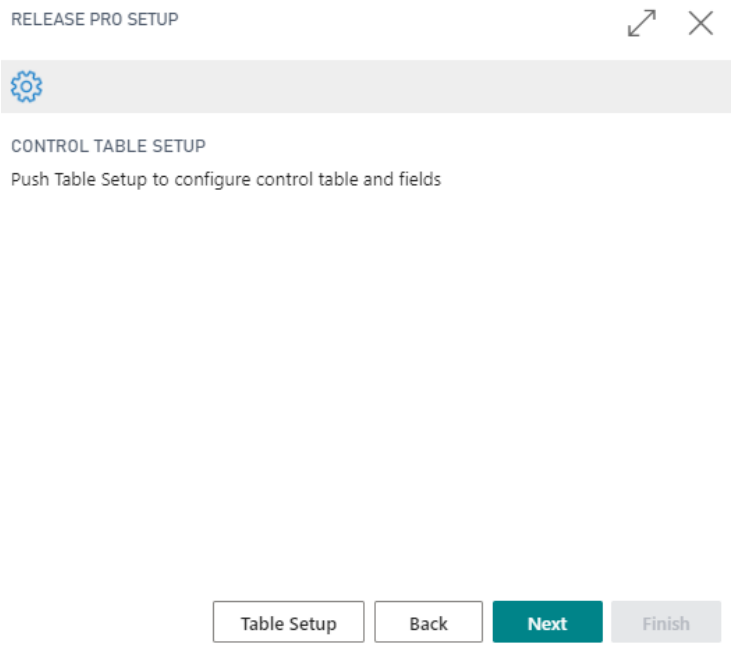

It is possible to define immediately or later the "Table Setup".

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3 CONTROL TABLE SETUP – MASTER DATA CONTROL

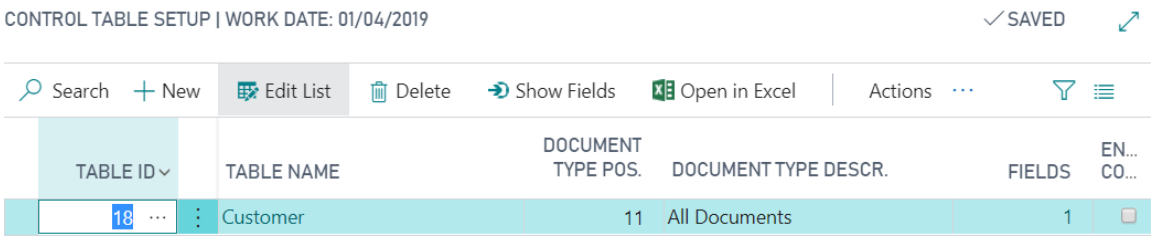
3.1 Master data Control

To create a control, select "new" from the page *Control Table Setup*.

For example, to create a control on the customer card release it is necessary:

• In the *Table ID* field, click on assist button and will be appear Name/Value lookup. Select the table where apply the control (in this case 18 that is the customer table);

• The *Table Name* field will be automatically filled in;



• In the *Document Type Pos.* and *Document Type Descr.* Select for which type of document apply the control. These fields are necessary only for table related to documents. For master data are automatically filled in with *all documents.*

3.2 Setup a basic control

To set the conditions of the control click on *Show Fields*.
In the new window it is possible to set the conditions.

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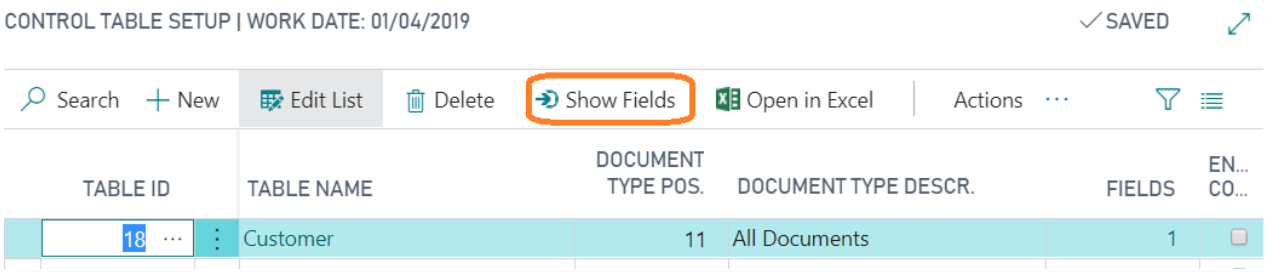
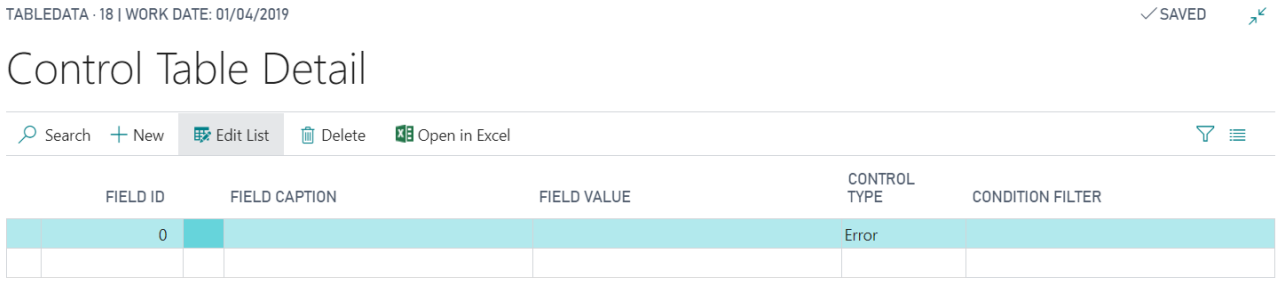
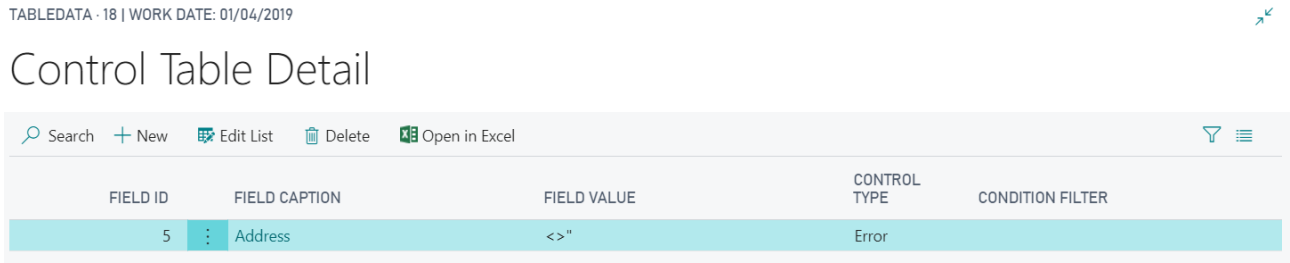




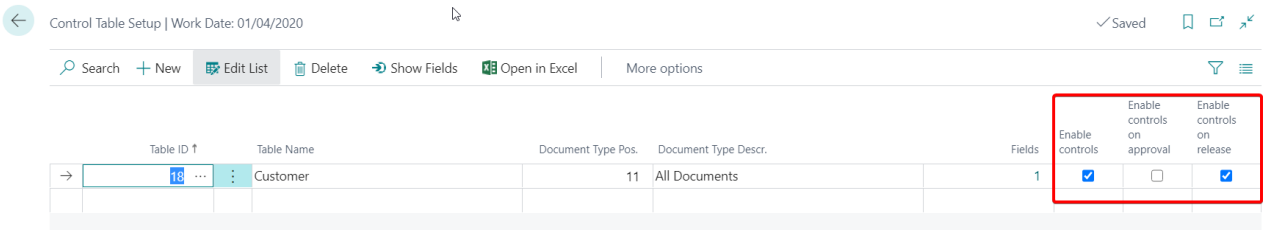
- In *Field Id* insert the field no. to which apply the control (for example the address);
- The *Field Description* is automatically filled in;
- In *Field Value* fill in the condition that must be verified. Use the filter symbol to set the condition (in the example has been set <>'', it means not empty);
- In *Control Type* you can select 3 different options:
  a) **error**: the system shows an error message and does not release the card;
  b) **warning**: the system shows a warning message, it is possible to click OK and the card will be released;
  c) **notification**: the system shows a notification message at the top of the screen.



This is a basic control.
To activate it, go back to the initial page and check *Enable Controls* flag.
Depending on the flow you want to set up, you need to enable the following fields:

- *Enable controls on release*: controls will be executed releasing a card or a document.
- *Enable controls on approval*: controls will be executed sending an approval request for a document, only for tables *Purchase Header, Purchase Line, Sales Header, Sales Line*.

The column *Fields* shows the number of controls set up.



It is possible to enable different controls on different fields at the same time.

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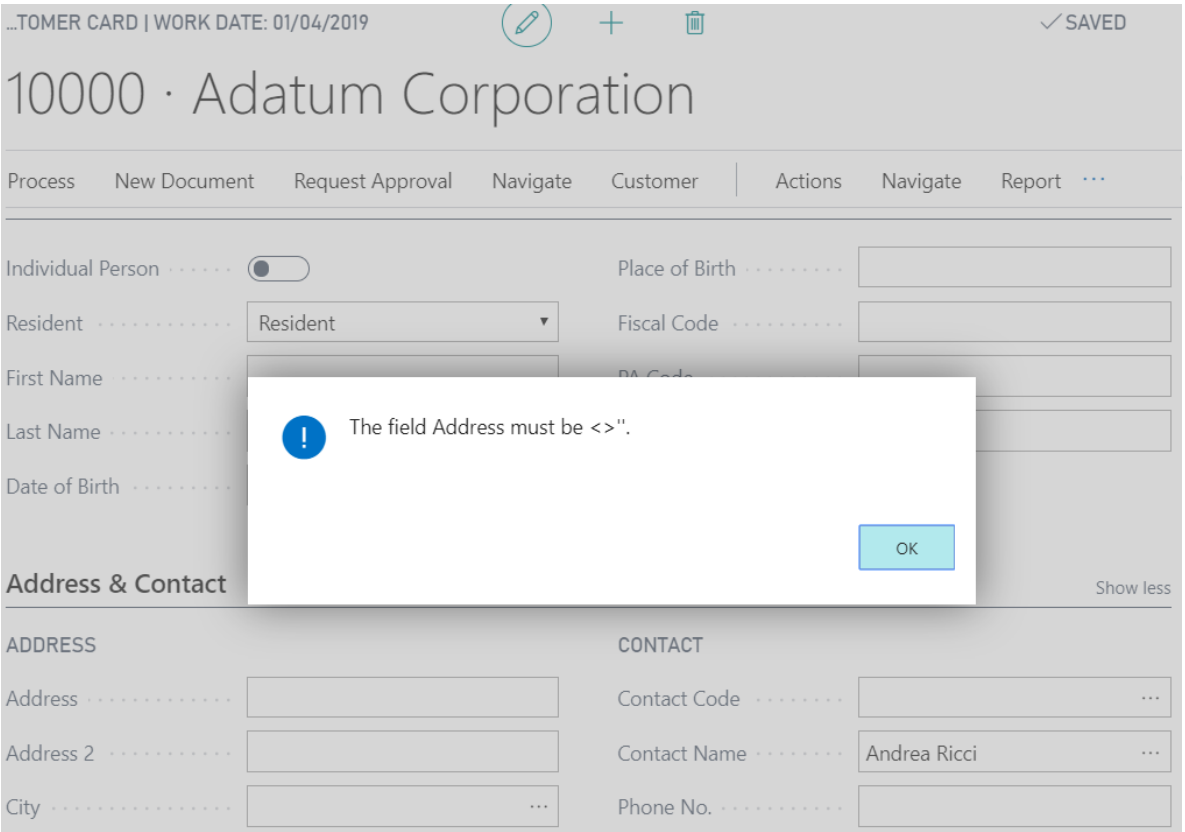
In the example the system checks that the address is not empty when a customer card is released and shows an error.



3.3 Setup a control with specific filters

Many specific conditions can be set for the controls. For example, opening again the control on customer card, it is possible to set the control to check that the address must be not empty when the country is IT.

To setup this control, open Control table Detail and in *Condition Filter* field select the button with the 3 dots.

In the new window is possible to set the filter:

- In *Field Number* select the field to which apply the filter (in this case Country/Region Code);
- In *Field Filter* enter the filter's value. (In this case the control must be active only for customer with country code IT). Note that it is possible to link multiple filters and use all the classic values (such as '', <>, etc. ...) .

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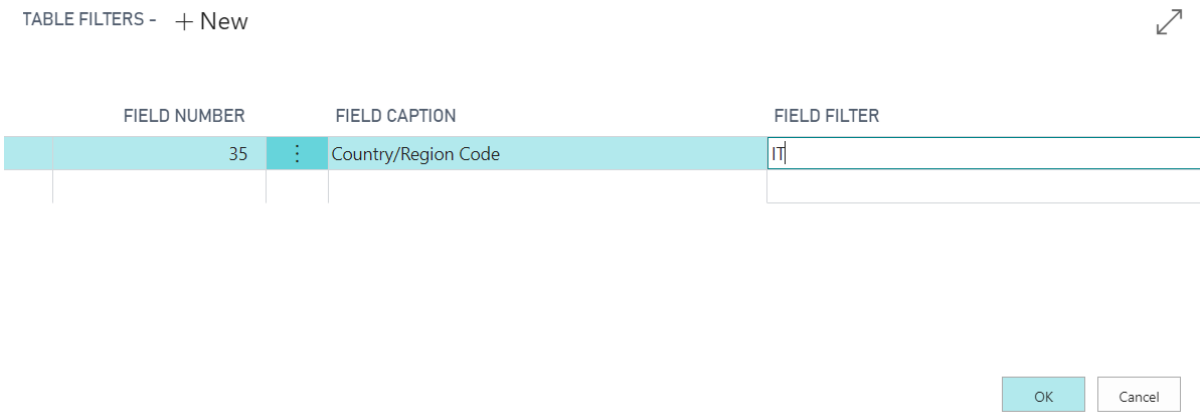
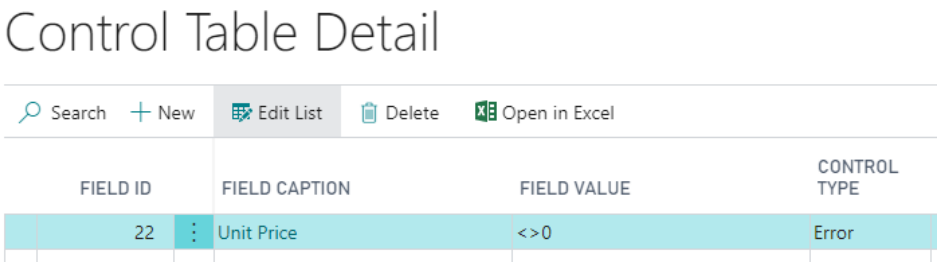


To complete the setup click OK. In this way a control has been set with a specific filter.
In this example the system shows an error on the customer card release when the country is IT and the address is empty.

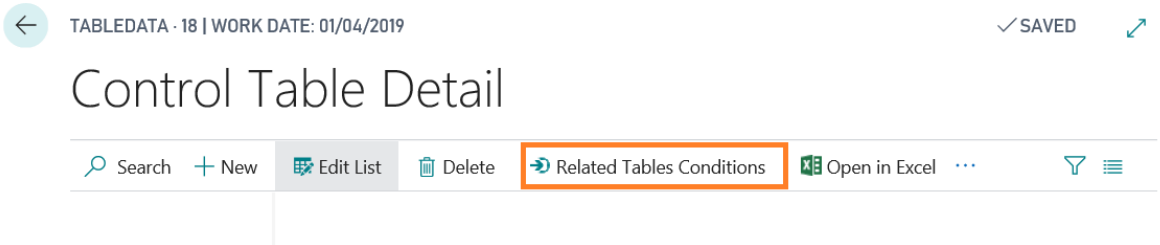
3.4 Setup a control with relation to another table

It is also possible to set a conditional control for a field in another table.
In this example, the unit price of sales order lines must be <> 0 when the country code of the customer is IT.

Create a basic control as explained in point 3.2 for the unit price on sales line.



To set the table to which the control is related, select the *Related Tables Conditions* button.



A new window is open:

- in *Condition Table ID* Field, select the related table (in this case customer table);
- In *Condition Filter* field set the filter's field, the procedure is the same as that explained in step 3.3. In this example the condition filter is country = IT.

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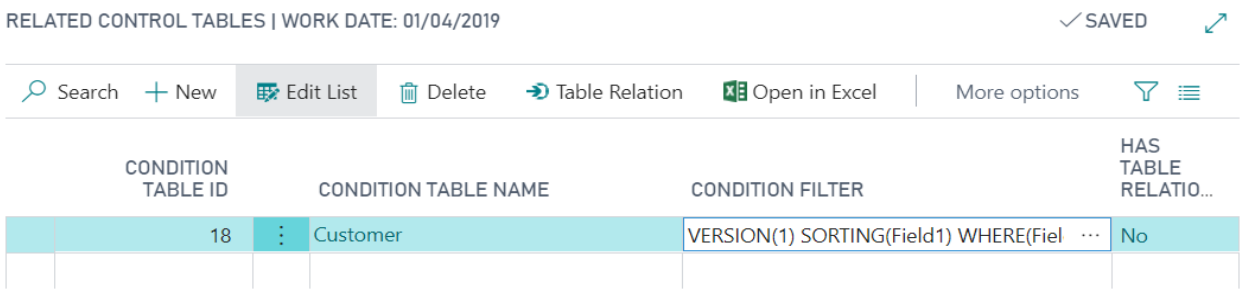
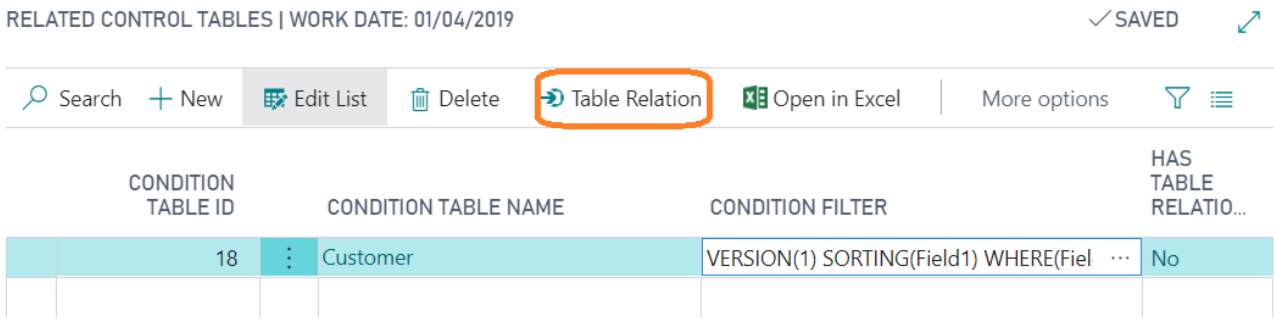
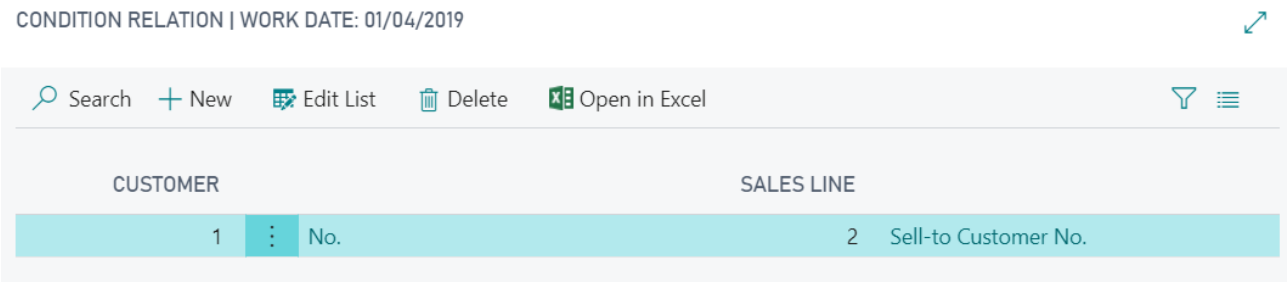


To complete the setup is necessary to link the 2 tables (customer and sales lines).
Select Table Relation button.

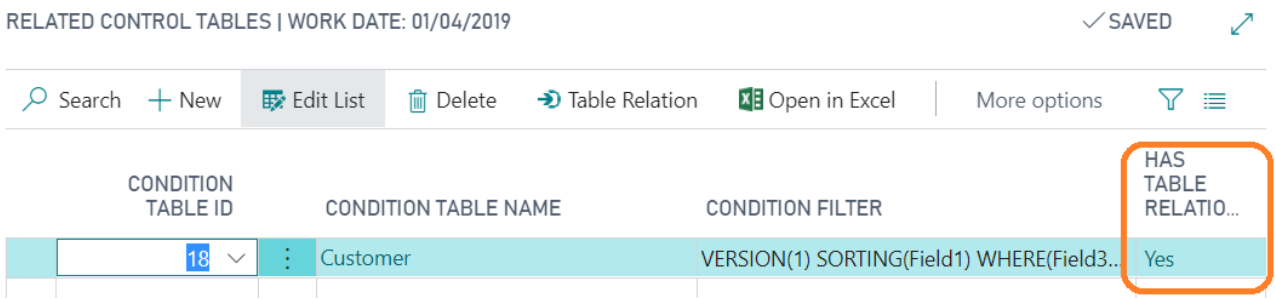


In the new window there are 2 columns for the 2 tables (customer and sales line).

It is necessary to link the 2 tables with the field they have in common.
In the example, for the customer the field is No. and for sales line Sell-to customer No.



Note that once this relationship has been set, the system will update the field *Has Table Relation*.



In this example the system shows an error on the release of the sales order only when the unit price is <> 0 and the Country/Region Code of the related customer is IT.

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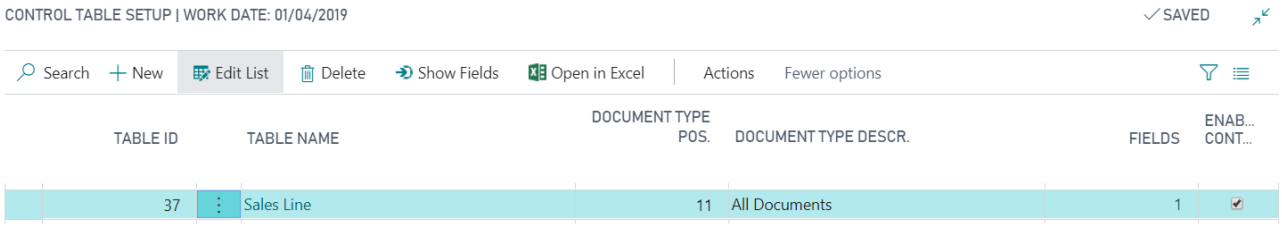
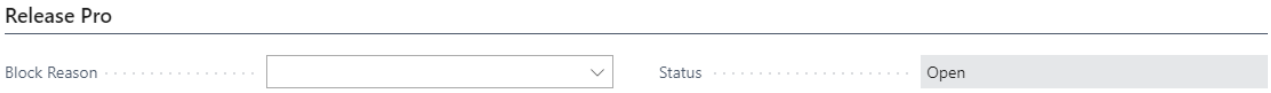


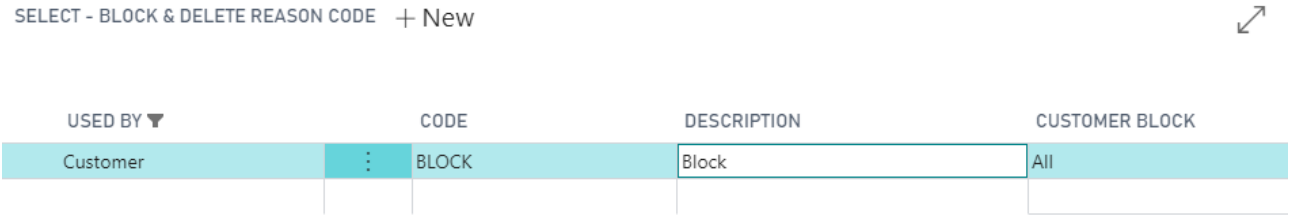
3.5 Master data release and block reason code

The controls are performed on master data release.
On each master data card there is a new section for Release Pro app with:

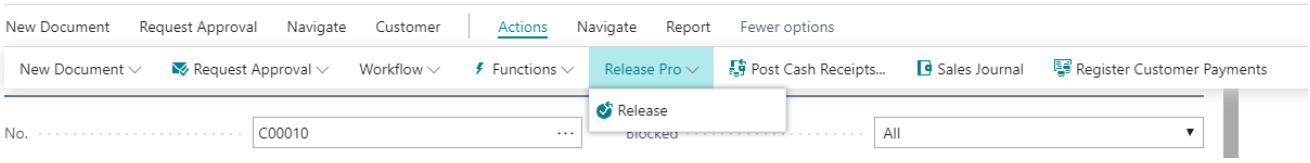
- Block reason: it is possible to choose different reason code for block the card;
- Status: open or released like the documents.



It is possible to create a block reason code for each type of master data.



The new cards are automatically open and Blocked: All.
The user completes the card and click on button Release.



The system performs the controls set in control table setup.
Without errors:

- The status is released;
- The Blocked field is empty;
- The card is not editable.

With errors the card remains open and blocked.

It is possible to select a block reason.
In this way the card is blocked also after performing the release.

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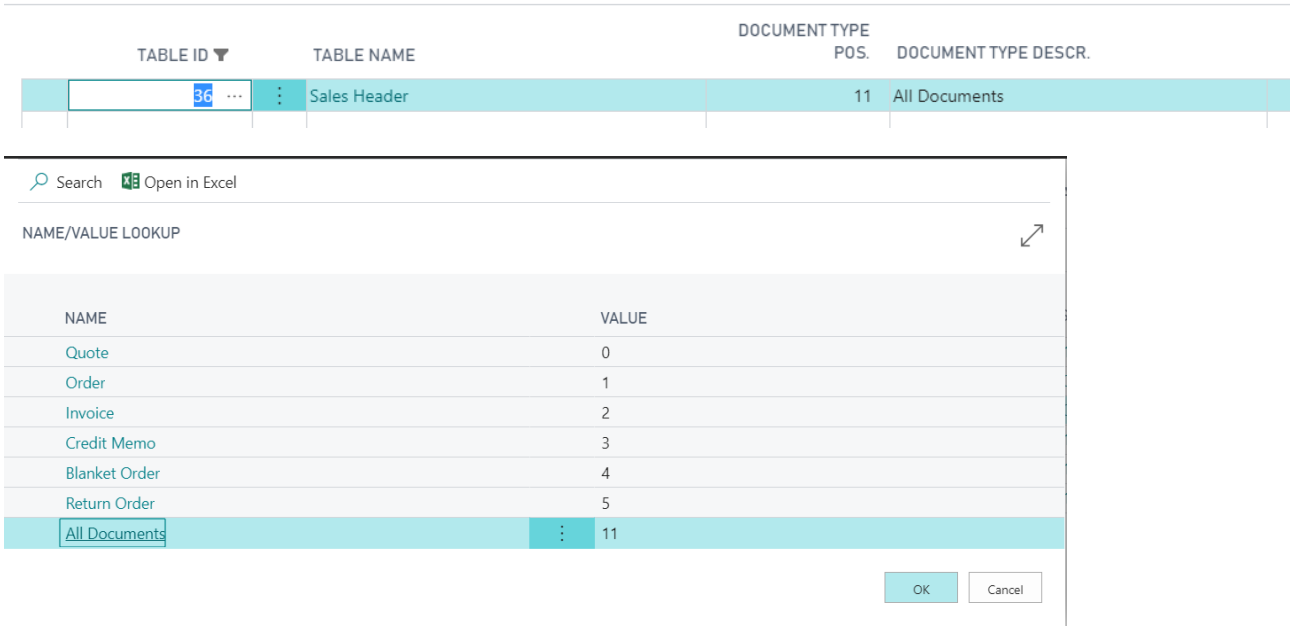
4 CONTROL TABLE SETUP – DOCUMENT CONTROL

4.1 Document Control

Open the control table setup page and select a table for sales or purchase documents (such as table 36 - sales headers).

Complete the line in the same way of the previous chapter.

For documents it is possible to choose the *Document Type Pos*.



It is possible to select different controls for different types of documents: quotes, orders, etc.

The control is performed when the document is released.

All the other functionalities described in the previous chapter are available also for documents.

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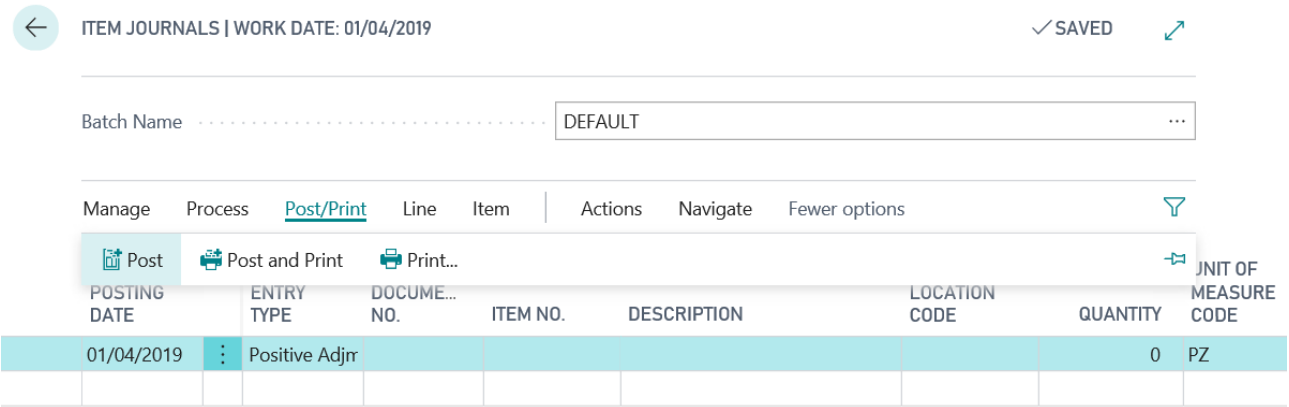
5 CONTROL TABLE SETUP – GENERAL AND ITEM JOURNALS CONTROL

5.1 General and Item Journals control

The ReleasePro setup enables the controls also for Item and General Journals.
Complete the setup in the same way of the previous chapter.
The related tables are 81 general journal and 83 item journal.

The control is performed when the document is posted.



All the other functionalities described in the previous chapters are available also for journals.

6 APP SUBSCRIPTION

Every App feature requires a valid subscription.
At first installation, a trial plan is automatically activated by the system.
After this period, you can subscribe for a product level (feature) using the Alterna Apps page or directly from the system notifications by clicking on the link which opens the product activation wizard.

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