P&A Lookup

Last updated: February 17, 2023

The Price and Availability enquiry (or lookup) is available in three different places:

1. Directly On an Inventory Item, by clicking the 'Check P&A' button
a. Note this will be default only show for Administrators, the script deployment will need to be added for other roles

2. Directly from the menu in the Classic centre:
a. Transactions > Custom Records > eInteract Realtime Enquiry

3. On transaction entry (Quote, SO & PO) if the transaction form being used has been modified to include the P&A Lookup checkbox column
a. Three forms will be created as part of the eInteract bundle:
i. Quote with P&A
ii. eInteract Purchase Order
iii. Sales Order - Invoice with P&A
b. If customising a form, use one of the above as a basis
c. The form will have a Script associated to it to show that has the P&A lookup:

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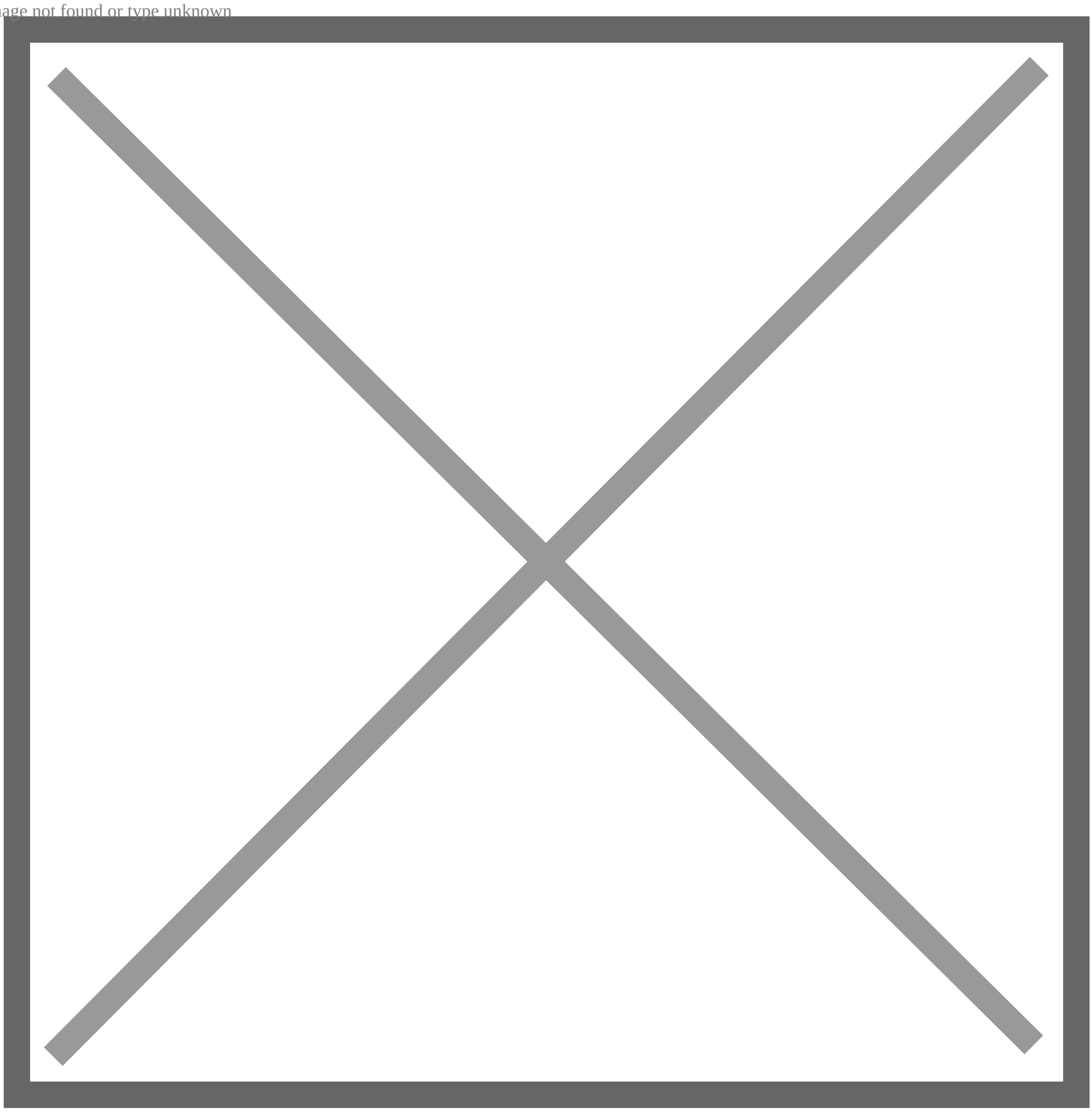

If accessing the screen directly from the menu, an item must be selected and then the Check P&A button used to perform the enquiry; otherwise the screen will automatically check for the current item (from the Inventory Item record or transaction line).

When the enquiry is carried out, each of the linked vendors for the item will be checked to see if they are configured for Onetrail. Each Onetrail vendor will be queried (via a web request to Onetrail) for up to date pricing and availability information. Initially the screen will display “Waiting…” in the Additional Text column and this will be cleared or replaced with an error message as each response is processed.

The screen displays the name of each linked vendor, indicates the Preferred Vendor (if set), the last purchase price and the price and availability details retrieved from Onetrail.

If the enquiry screen has been opened from a sales transaction form, one of the pricing lines may be selected and then the Select button used to return the Vendor and Price to the PO Vendor and PO Rate fields on the transaction.