

Customization & Enhancement Guide

Using This Document

This document provides a selected list of information about customizations and enhancements that the developer believes could improve the functionality of the application for some users.

Upon installation the following documents will be provided

- a) Imperiumtex Customization Guidelines
 - This Guideline covers customization for Salesforce Standard Objects and Custom Objects, Workflow Rules, Processes, Email Alerts and Field Updates

This Guideline provides complete step- by- step instructions to ensure that Imperiumtex can be configured successfully and quickly upon installation.

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1. Auto-generated Numbers

What: **Modify system generated Auto-Numbers**

Why: Allow System Administrators to modify settings for Auto-Generated Numbers for the following fields according to required individual Company numbering convention:

- a. **Customer Order No:** – current format is A-{MM}{YY}{00000} ie letter “A” followed by month, year and number sequence.
- b. **Color Library Reference No:** – current format is {YYYY}{00000}- ie, year and number sequence.
- c. **Trips by Customer** – current format is {MM}-{YYYY}-{0000}- ie month, year and number sequence.
- d. **Visits to Customer** – current format is {MM}-{YYYY}-{0000}- ie, month, year and number sequence.
- e. **Carton Packing Refce No:** - current format is {YY}/{MM}/{DD}-{00000000} – ie year, month, date and then number sequence.
- f. **Loose Packing Refce No:** - current format is LP - {YY}/{MM}/{DD}-{00000000} – ie LP followed by year, month, date and then number sequence.

How: Modify Customer Order No
Customer Order No Auto-generated Number is modified by going to: **Setup > Build > Objects > Customer Order > Standard Fields / Customer Order No / Edit**

Modify Color Library Reference No
Color Library Refce No Auto-generated Number is modified by going to: **Setup > Build > Objects > Color Library > Standard Fields / Color Library Refce No / Edit**

Modify Trips by Customer
Trips by Customer Auto-generated Number is modified by going to: **Setup > Build > Objects > Trips by Customer > Standard Fields / Trips by Customer / Edit**

Modify Visits to Customer
Visits to Customer Auto-generated Number is modified by going to: **Setup > Build > Objects > Visits to Customer > Standard Fields / Visits to Customer / Edit**

Modify Carton Packing Refce No:
Carton Packing Refce No. Auto-generated Number is modified by going to: **Setup > Build > Objects > Carton Packing > Standard Fields > Carton Packing Refce No: > Edit**

Modify Loose Packing Refce No:
Loose Packing Refce No. Auto-generated Number is modified by going to: **Setup > Build > Objects > Loose Packing > Standard Fields > Loose Packing Refce No: > Edit**

2. Customizable Pick-Lists

What: Modify, delete or add new values to Pick-List fields

Why: Allow Pick-List values to be modified, deleted or added to better reflect the business requirements of the Company.

How: The following are some Pick-Lists in selected Custom Objects that can be modified to suit each Company's requirements. A complete document of all customizable Pick-Lists with pick-list details will be made available to System Administrators

Customer Orders

Product Line
Piece Length
Delivery Packaging Type
Fabric Packaging Type
Quota Category
Quota Area

Production Orders

Finish Handle
Packing Allowance
Dye Lot Type
Inspection Standard
Sample Charge
Label
Invoice Type
Category
Color Reference (Col 1 – 12)
Test Report Requirement
Paper Tube Size
Roll Type
Packing List Type
Inspection Report Type
Hanger Type
Booklet Type

Color Library

Light Source
Approved Shades (CL1 – CL12)
Color Categories
First Batch Despatch Colors
Second Batch Despatch Colors
First Re-Lab Dip Despatch Colors
Second Re-Lab Dip Despatch Colors
Third Re-Lab Dip Despatch Colors
First Batch Lab Dip Shade Reference Sent
Second Batch Lab Dip Shade Reference Sent
First Re-Lab Dip Shade Reference Sent
Second Re-Lab Dip Shade Reference Sent
Third Re-Lab Dip Shade Reference Sent

Note: STATUS PICK-LISTS for Customer Orders, Production Orders, Product Items, Finish Types, Product Costs, Factory Costs involves Work-Flow Approval processes of Submission, Pending Approval, Approved and Rejected options and are NOT customizable unless relevant Work-Flow Approval processes are modified or deleted.