I-35 Trailer

Texas 130U P# and Address By Location

Overview:
The Texas 130U is done for sold stock units (trailers mostly). It is a form of paperwork. Every single server has got some back end documents set up to control the 130u. By default whatever data is entered into the field, that is what is used to populate the document. We call those fields “assignments.” The goal is to add some keywords to the assignments (where we store the settings) so that we can skip the hardcoded values and dynamically pull database information to populate the form instead.

1. You may need to have a permission turned on called “Document Management”. Id#= 107. Burgundy color under “System management”. This is a high up admin permission.
2. From classic homepage, click on management, and find subset called ‘Document Management”. That will take you to a page called “secure/document\_home.cfm”. This is the page that both creates the general document and controls the general assignments. One document may have many assignments. Depending on the needs, certain corps only need access to certain docs/paperwork.

On your local environment, you will need to search for the value “130”. This should give you two entries: normal and data only. We need to alter the main instructions per document. This data is actually held in the database-not a code change. Do this by clicking on the document name. This will take you into the underlying names and instructions that will be used globally for the current document. Find the section that deals with the “GDN”, most likely box 4. Leave the title alone, and in the description put something like this: (sample: P5555X or for multi use "by\_loc") The “by\_loc” will be our new key word so we can break out of the normal flow. We need to do the same thing (add keyword “by\_loc”) to box 2 and 3 as well (address, city, state and zip).

This needs to be done on the normal and the data overlay (data only). Those are the two different documents that deal with the 130U.

1. Once you are done with this, go to the assignments. Instead of clicking on the document name, you will click the word “assignments” on the far right. If there are already existing assignments, they will be at the bottom of that next page. If you need to create a new one, you will use the form at the top. Both the add and edits exist on the same page.
2. As you are looking at the new assignments page, “secure/assign\_documents.cfm”, there should be some new instructions for the boxes. (what you added in previous steps with new key word). We need to change or enter those key words so we can pull from multiple locations. You may have to come back and forth to this page to test certain settings, and make sure it’s holding. Eventually you will need to modify boxes 2,3 and 4. Don’t worry if the instructions say something different ie box 15- that isn’t real. Count down in order to get to box 2, 3 and 4. We control the instructions and directions, but what we are really concerned with is the order in which those boxes are arranged.
3. Make sure and submit the changes. This will finish up the assignment section. Next we need to go to the location homepage. From classic homepage, go to system maintenance and then to location homepage. Click on the location name to go down to the location details. Find the field for location license number. As a side note, the name location is dynamic and could be renamed by corp. The license number is going to end of being the box 4 from the previous assignments. This is also where you will control the address and city, state zip fields. Address is box 2 and city, state zip is box 3. You may be playing back and forth for testing to make sure the data is pulling correctly.
4. Switching to stock units. Make sure you have a sold stock unit. If you don’t, you have to sell one. Ask Brandon if you need help with that. Now that you have a sold unit, make sure you are on the sold stock units detail page (classic, system reports, sold stock units, run the report, and click on your stock unit). From the details page, click on more options, then the paperwork link. If your assignments were made correctly, look for the 130U which is basically in a list of possible document assignments for that corp. When you click on this link, it will take you to a new page that pulls data from the sale and will populate a pdf. The page name is “secure/doc\_form\_tx\_130u.cfm “. It may take a bit for this page to load. Both the normal pdf and data only pdf go to this page. Eventually that is where the new code is going to end up.
5. On this page, “secure/doc\_form\_tx\_130u.cfm” you will need to make your changes. By default, the page is set up to use whatever value you have in the assignments and it will populate it into the pdf form. The goal here is to add new code to alter what data gets populated into the resulting form boxes 2,3 and 4. All changes so far should be database changes. To start making your code changes, search for this code variable: “retAssignment\_st”. This will get us the assignment data. If it’s normal, use it as is- no key words are found. If there are one or more key words, we will need to adjust to get that information from the database. As a sample you are looking for this: “retAssignment\_st.qryGetAssignment.value\_3”. Remember we are looking for values 2,3 and 4.
6. Build some “if”statements. If the keywords are found, we need to get some information from the stock unit to determine which location to pull data from. The method is called “getUnitdata”. Find your method under “cfc/assets\_2.cfc”. This method gets us everything we need except for the new field: “store\_dealer\_license” found in the store\_ location table. Once on the asset page, If you do another search for “store\_location” you will see where all the other address, city state zip stuff is being pulled. Just add to it so it can grab the dealer license number.
7. Once the data gets pulled back, it should be in this variable: “retUnit\_st”. Look for the assignment values 1,2 and 3 and then add correct if statements and logic to flip flop between the normal assigned data and the new keywords that create the bypass.
8. Make sure you test a bunch so both hard-coded assignment values are pulled in as well as dynamic keyword by pass is pulled in.
9. Make sure you do code sign off.
10. The final step is to go to every server and make sure all those document definitions get updated. Client who paid is on data 0. Their corp name is I-35 Trailers. We want to make sure to modify the settings for this client in both corps.