



DS0097
SOP Fulfillment



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Problem Definition

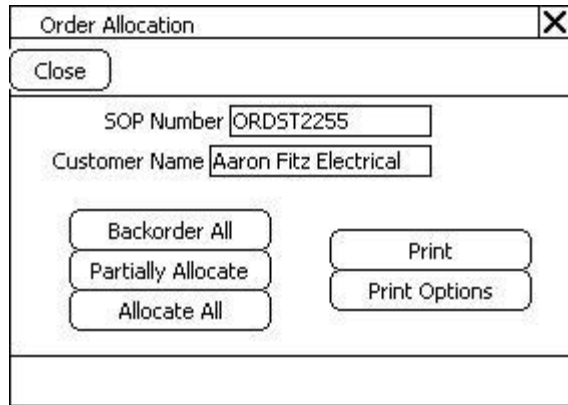
<i>Problem Definition</i>	CCDA
<p>ACME Co. receives 1500-2000 orders per day during the peak season. They like to ship all orders complete, so if there is a shortage for any of the lines on an order, the entire order would be held until all lines can be fulfilled.</p> <p>ACME Orders are set up to use a Separate Fulfillment Process, and to Allocate By Line. VShip from VSync is used to fulfill the orders.</p> <p>Inventory is allocated by-line as the order is entered. If there is a shortage, the Sales Quantity Shortage Options window opens, and the user selects "Back Order All". When the order is complete, the user needs to find (or remember) that one or more lines were backordered, then manually change the other lines to backordered so that the allocated inventory is released. If all lines were fulfilled, a Pick Ticket is printed and the order is shipped and invoiced.</p> <p>The following issues need to be addressed:</p> <ol style="list-style-type: none"> 1. The user has to always select "Back Order All", when that is always the option they select. The system should just default to this and not require the user to select it. 2. An automated method is needed to automatically Back Order all line quantities, or automatically Allocate all if the lines were previously backordered. 3. The Pick Ticket should print automatically for an Order. 	



Solution Overview

<i>Solution Overview</i>	CCDA
<p>A modification to Dynamics GP will be created that provides the following functionality:</p> <p>During order entry (Sales Orders), if there is not enough inventory to completely allocate a line, the entire quantity will automatically be back ordered, without requiring the user to select an option from the Sales Quantity Shortage Options window.</p> <p>When clicking SAVE or PRINT the software will check available inventory, and present the user with a dialog box that allows them to (1) backorder all lines, (2) allocate all lines, or (3) partially allocate lines. If the user had clicked PRINT, the system will automatically print the Pick Ticket.</p>	

Design Features

SOP Entry Modifications	CCDA
<p>When entering a sales order, if the quantity entered is greater than the quantity available, the system will automatically default to the Quantity Shortage option specified in Sales Order Processing Setup. The user will not see the Sales Quantity Shortage Options window.</p> <p>When the SAVE or PRINT button is clicked on Sales Transaction Entry, the new Order Allocation window will pop-open. The window can also be opened manually from Extras >> Additional >> Order Allocation.</p> <div data-bbox="445 751 1008 1153" data-label="Image">  </div> <p>When SAVE is clicked, the Order Allocation window will always open.</p> <p>When PRINT is clicked, if all lines are fully allocated the Order Allocation window will NOT open, and the Pick Ticket will automatically print. If there are partial allocations and/or backordered lines, the Order Allocation window will open.</p>	

Field	Function
Close	Closes the window without making changes do the document
SOP Number	When either SAVE or PRINT is clicked, the document is saved and the Sales Transaction Entry window clears. SOP Number shows the document number that will be allocated/backordered.
Customer Name	Displays the Customer Name.
Backorder All	<p>If one or more lines are allocated, or partially allocated, this button will be enabled. Otherwise the button is locked. In other words, if all lines are backordered, this button will be disabled.</p> <p>Clicking Backorder All will unallocate inventory from all lines that are allocated or partially allocated. If lot or serial numbers have been selected, these too will be released.</p>
Partially Allocate	<p>When Partially Allocate is clicked, available inventory will be allocated to the sales lines. Available inventory will be applied until there is no available quantity left, or all sales lines are fulfilled. Some lines may still be backordered, some may be partially allocated, and others may be completely allocated.</p> <p>After performing the allocation, the Pick Ticket will automatically print.</p> <p>See the serial/lot number note in the Allocate All section—it also applies to Partially Allocate.</p>
Allocate All	<p>When Allocate All is clicked the system will attempt to allocate all lines.</p> <p>If in the process of attempting to Allocate All, the system finds that some lines cannot be fully allocated, the system will roll-back ALL allocations it has already made, backordering every line. In other</p>

	<p>words, if it cannot Allocate All, it will Backorder All. A simple report will print showing which lines would have been partially allocated. The Order Allocation window will remain open, so the user could choose to Partially Allocate.</p> <p>After performing the allocation, the Pick Ticket will automatically print.</p> <p>NOTE: If Serial/Lot numbered items exist on the order, serial/lot numbers will NOT be auto-allocated, but inventory for the item will be. The user will need to manually select serial/lot numbers. This is the normal process for an Order with separate fulfillment.</p>	
Print	Prints the Pick Ticket for the currently selected document.	
Print Options	Opens the Sales Document Print Options window. This might be used if Order Allocation is opened from the Extras menu, and the user needs to reprint a document, or print something other than the Pick Ticket.	