DS0499

SOP Load Planning

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Problem Definition

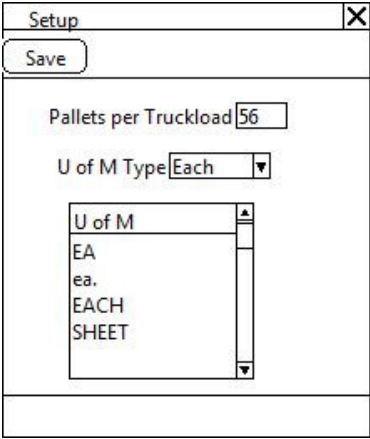| Problem Definition	CCDA
ACME Co. currently enters Sales Orders into spreadsheets, before re-keying them into GP, because they need to calculate full pallets and truckloads and split orders, if needed, if the load for the order would exceed one full truckload. A full truckload is always 56 pallets, but the quantity of a specific item varies per pallet. ACME Co. needs GP to: 1. Track the total quantity of pallets on an order and alert the user when a full truckload is reached. 2. Ensure that each sales line is ordered in multiples of whole pallets. Currently each item does NOT have its own Unit of Measure schedule, so the U of M Schedule cannot be used to contain a Pallet to Each conversion (because it varies by item). As part of a larger Warehouse/Inventory project, ACME Co. will implement item-specific U of M Schedules. The U of M Schedule will contain a Pallet to Each conversion for each item.	

Solution Overview

Solution Overview	CCDA
The Sales Entry window will display the quantity of eaches needed to reach the next full pallet, and also the total number of pallets on the order. This will be informational only, and will not PREVENT the user from entering a line with less than a full pallet, or creating an order with more than 56 pallets.	

Design Features

Setup	CCDA
Navigation: Tools >> Setup >> Sales 	

Field	Function
Pallets per Truckload	User can enter any value between 0 and 32767. Although this value is currently 56, and is unlikely to change, having it as a setup option prevents this value from being hard-coded in the software where it is more difficult to change.
U of M Type	This controls which list of Units of Measure is displayed in the scrolling window: Each or Pallet.

U of M Mapping
The scrolling window is used to tell the system which Unit(s) of Measure mean "each" and which mean "Pallet". This is a mapping between the various "words" that denote a single
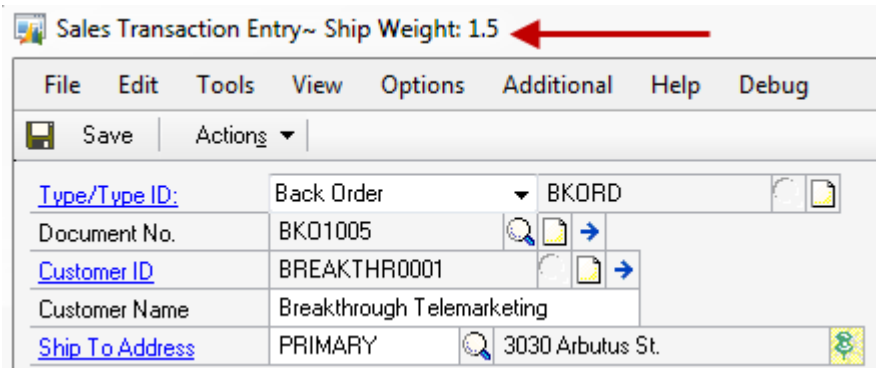
unit of inventory and the "concept" of each. Knowing the list of possible options for "each" and the list of options for "pallet", the system will be able to locate an Item's U of M Schedule and find the Pallet to Each conversion.	

Sales Transaction Entry	CCDA
The software will modify the Title Bar of the Sales Transaction Entry window so it displays additional information. An example is shown above, where the Title Bar is displaying Shipping Weight. For ACME the message will contain: • Quantity Per Pallet for the current row (the sales line where the cursor is). The UofM Mapping from Setup will be used to locate the Pallet to Each conversion on the Item's UofM Schedule. • Quantity to the next full pallet. If the Quantity Per is 200, and the Sales Line Quantity is 163, the quantity to the next pallet is 37. • Total Pallets. The total number of pallets for all of the lines. This value will be rounded to 1-decimal place in the event a whole number of pallets is not entered. The message will be displayed as shown below: "Qty Per: 200 ~ Next Pallet: 37 ~ Total Pallets: 5 When viewing an existing document, or the focus is removed from the lines on a new document, the message will show only the Total Pallets.	

If the sales line is NOT entered in the base unit of measure (i.e. the U of M is not in the "Each" list in Setup), the software will assume there is no conversion to Pallets and Qty Per and Next Pallet will display zero. The quantities from that line will not be included in the Total Pallets. If a Pallet to Each conversion cannot be located on the Item's U of M Schedule, this will also cause the Qty Per and Next Pallet to be zero. This could happen if the U of M used for Pallet has not been entered in Setup, or, if the U o fM Schedule does not have a Pallet to Each conversion.	