

New Allocation Override Popup in Sales Order Entry and Customer Maintenance

Transaction Allocation Override gives you the power to override the Directed Picking Rules for Sales Orders. The override can be applied to the customer to automatically override future orders for that customer.

- Easy/quick grid operand commands can supersede the allocation algorithms for orders on the fly and by Customers for regular overrides.
- Use operand selections to select range of locations, region/zones, Pallet IDs and other.
- Choose to Start with your selections and then continue on when there is no inventory or to just allocate from the overrides.
- Compliant with bin location pick restriction settings and will work with the new transaction based pick restriction. Overrides for locations, regions and pallet ID's will allow inventory to be allocated from the location with the matching pick restriction.
- The override allows you to override location types so for example if want the order to be pulled from back stock or only from the primary locations.
- Future compatibility with other transactions and JobOps.

Transaction Allocation Overrides

Sales Order No: 0000221 Customer: Capri Sailing Ships Whse: 000

Override All Dflt Type: PAL Dflt Masters:

Override Directed Picking Allocations

Override Locations Allocate from selections: Only Allocate from Selections

Select Field	Operand	Value
Bin Location	All	
Region Code	Equal to	AMAZON
Location Pick Priority Code	All	
Pallet Case ID	All	
ID Type	All	

Override Algorithm by Valuation

Override Algorithms

Non Lot Serial Items: Received in Location FIFO

Lot Serial Items: Lot Serial Number

Override Location Type Priorities

Override Location Types

Primary Locations: 1st Other Area Locations: 3rd

Pick Area Locations: 1st Floor Area Locations: 1st

Overflow Area Locations: None Staging Area Locations: None

Buttons: Accept, Cancel, Delete

*** Sales Order Entry (ABC) 1/9/2018**

Order Number: 0000227 User: ron

Item Code	Ordered	Locations	Allocated Qty	Qty Alloc Avail	Back Ordered	Unit Price
1 1001-HON-H252	100.00	A10L	10.00	200.00	.00	75.60
2 1001-HON-H252	100.00	E-300-10	100.00	492.00	.00	75.60
3	.00		.00	.00	.00	.00

Shipped: .00 Price Level: Total Amount: 15,120.00

Buttons: Print Order..., Print Pick..., Allocate, Recalc Price, Accept, Cancel, Delete

Open new Overrides dialog from the [Allocation Overrides](#) Link in the Sales Order lines panel and the Customer Maintenance Additional panel. Customer overrides carry over to new sales orders.

*** Customer Maintenance (ABC) 12/14/2017**

Customer No: 01-ABF Name: American Business Futures

Comment: Call Ed for credit approval.

Open Item Customer: Internet Enabled:

Customer Status: Active

Data Entry

Price Level: 1 Allocate from Region: Dflt Pymt Type: NONE Discount Rate: 0.00% Fin Charge Rate: 1.500% Allocation Overrides

Item Code: WIDGET

Buttons: Accept, Cancel, Delete

*Premium version is required for directed picking and directed putaway features

Sales Order Entry Interactive Allocation and Inventory Availability at-a-glance

- Know what is allocated on the order and what is allocable at-a-glance. Newer columns in sales order entry shows availability and what has been allocated.
- Click on the new Override link to change algorithms if desired. Grant rights to new link in role maintenance.
- Click the Allocate button to initiate auto allocations.
- Grant access to sales order clear allocations and allocate features in Sage security.

The **Locations** column gives a quick view of the locations inventory is hard allocated to.

Qty **Alloc Avail** column in the lines grid gives a quick view of quantity available after hard allocations.

Item Code	Ordered	Locations	Allocated Qty	Qty Alloc Avail	Back Ordered	Unit Price	Extension
19 GLOB-V-3672-25W	1.00	D10L	1.00	47.00	.00	101.000	101.00
20 GLOB-V-3696-25W	1.00	D10L	1.00	7.00	.00	131.000	131.00
21 GLOB-V-3096-25W	1.00	D10L	1.00	19.00	.00	114.150	114.15
22 PFS-004-CABLE	5.00	A40M	5.00	12,517.00	.00	180	90
23 PFS-004-CONN-F	5.00	D20L	5.00	140.00	.00	12.000	60.00
24 PFS-007-CABLE	5.00	D20L	5.00	11,995.25	.00	200	1.00
25 PFS-007-CONN-F	5.00	D20M	5.00	433.00	.00	13.000	65.00
26 PFS-007-CONN-M	5.00	D20M	5.00	98.00	.00	13.000	65.00
27 VOG-CM-CASTERS	3.00	D20M	3.00	98.00	.00	22.000	66.00
28 VOG-CM-CB	3.00	D20M	3.00	284.00	.00	47.000	141.00
29 VOG-CM-MP-B	3.00	D20M, D30L	3.00	127.00	.00	42.000	126.00
30 VOG-CM-MSC	3.00	D20M	3.00	24.00	.00	275.000	825.00
31	.00		.00	.00	.00	.000	.00

Auto Allocate Sales Order on demand - and auto redisplay results on lines panel.

Open new Overrides dialog from the **Allocation Overrides** Link in the Sales Order lines panel and the Customer Maintenance Additional panel. Customer overrides carry over to new sales orders.

Grant access to sales order Clear Allocations/main panel and allocate features in Sage security. The **Clear Allocations** is an existing feature to clear allocations on the on the fly. Also you can grant access to the Order Auto **Allocate button** and Allocate **Overrides** link. Turn ON the new security from Options—Directed picking tab.

Role Maintenance (ABC) 1/9/2018

Role: admin
Description: admin

1. Tasks 2. Security Events 3. Module Options 4. SData Security 5. ODBC Security

- Bill of Materials
- Business Insights
- Common Information
- Development Studio
- eBusiness Manager
- Fixed Assets
- General Ledger
- Inventory Management
 - Allow Access to Private Batches
 - Allow Automatic Display of Full Extended Item Description When Not in a Grid
 - Allow Defaulting of Quantity on Hand to Quantity Counted in Physical Count Entry
 - Allow Inactive Items During WM Transaction Entry
 - Allow Printing of Quantity on Hand on Physical Count Worksheet
 - Allow Purging of Item Audit
 - Allow Updating of Registers from Preview
 - MB Allow SO Entry Alloc Clear/Overrides
 - MB Display Auto Allocate in SO Entry
 - Multi-Bin Enable Supervisor

Multi-Bin and WMS Company Options (ABC) 1/9/2018

1. Main 2. Pick Sheets 3. Invoice Ship 4. Directed Pick 5. Receiving 6. Directed Put 7. Manufacturing 8. Pallets 9. Addl

Pick Area

Selected Primary Pick Locations

Non Lot Serial Items allocate using selected Primary Locations

Lot and Serial Items allocate using selected Primary Locations

Allocate thru the Remaining Pick Area. Valuation Allocation Rules.

Non Lot Serial Items Received in Location FIFO Lot Serial Items Lot Serial Number

Other Areas

Auto Allocate from Floor locations 1st

Auto Allocate from Other locations 3rd

Auto Allocate from Overflow locations 4th

Auto Allocate from Staging locations 5th

Jump to Overflow and Other Areas for Large Orders, Case Packs and Pallets

Options

Location Pick Complete if less Pick Locations

Allocate Kits if can Ship Complete

Include all Areas for the best Pallet Case ID

Allocate the higher level ID's when possible

Allow auto allocation less than the full pallet case ID

Require Security to SO entry Clear Alloc and Alloc Overrides

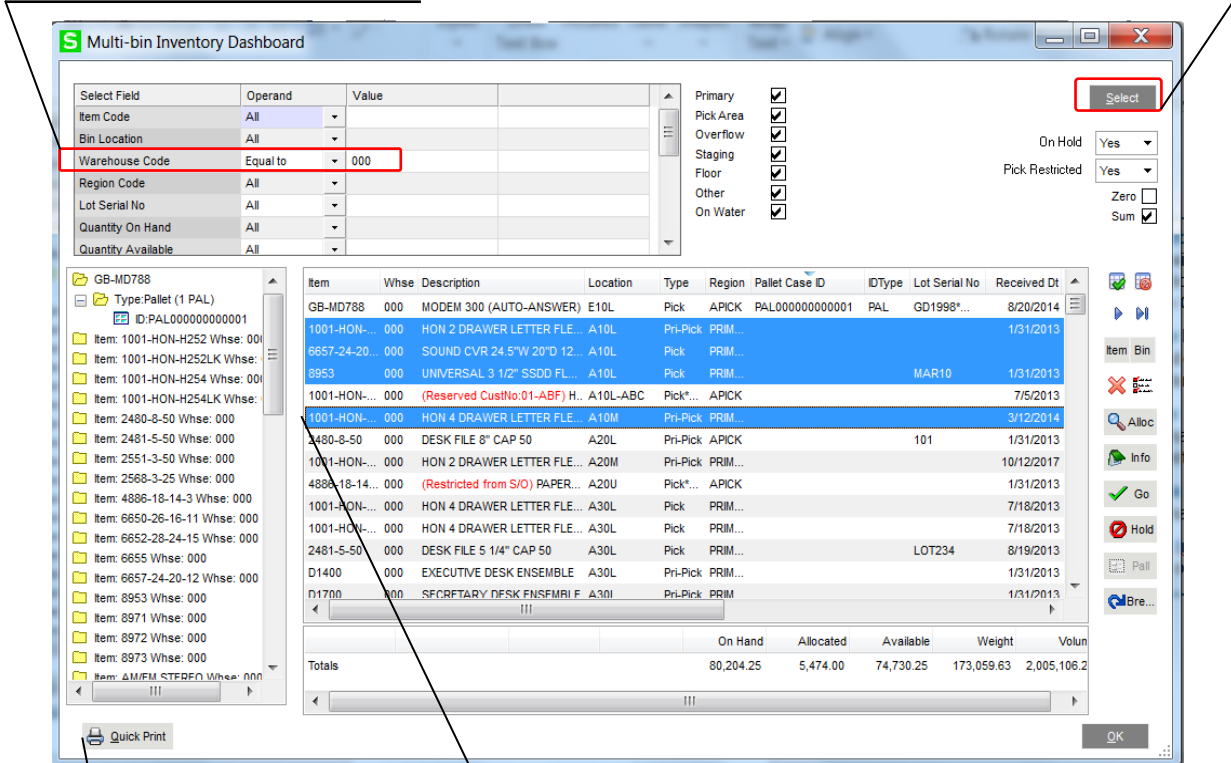
*Premium version is required for directed picking and directed putaway features

Multi-bin Inventory Dashboard

Utilize the strength of the selection operands to get at the data you need. Then control click and shift click to select the exact data you wish to transfer, put on hold, break pallets and much more. From the selection grid choose an entire Location or Region/Zone while evaluating net available. Or choose the usual selection fields like Items and Pallets and make unique fields like Lot Serial No, Lot Expire Dates, Quantity Allocated and Net Quantity Available. With On The Water activation select goods on Containers and by expected receive date range.

Multi-Warehouse selections: Defaults a single warehouse code. Can select multiple warehouses to select and print inventory.

Select button: After selecting fields and options, click the Select button to initiate display of inventory into the selection grid.



Quick Print: Prints an Inventory Quantity On Hand Valuation Report for

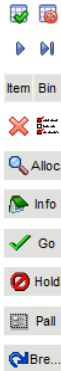
Multiple Selections: Click multiple selections with Control-click and Shift-click. Click the select the green All button to select all inventory; red to clear selections. **Intelligent Refresh** saves your view and time

On Hold	Yes
Pick Restricted	Yes
Zero	<input type="checkbox"/>
Sum	<input checked="" type="checkbox"/>

On Hold and Pick Restricted inventory: Select Yes to include inventory and pallet IDs on hold or locations in locations with a pick restriction. No to not include. Only

Zero: Displays inventory that has been fully relieved from a location. Options will remove this inventory during period

Sum: Summarized view for the contents of each Pallet ID. Uncheck to display each item in the ID in the grid.



Transfers: All selected inventory is passed to the group item/pallet transfer grid. All inventory can be quickly transferred to a location and/or pallet. If one item was selected the quick transfer app is launched. User login role Maintenance rights are

Drill Down/Allocate to Orders: The allocations for all selected inventory. Can quickly delete allocations and allocate inventory to open sales orders.

Go/Release: The release button will immediately release all selected inventory with holds. User login role Maintenance rights are required.

Hold: The hold button will immediately put a hold on all selected inventory. User

Break Breaks all selected Pallet IDs.

*Inventory dashboard is included for all versions.

Replenishment and Putaway Dashboard

Now replenishment and directed putway is faster with the more built-in indexes and offers more options.

Put Batch No.

From Warehouse Code

To Warehouse Code

Batch Description

Replenishment Filter

Selections to the Items and Locations to Replenish

Select Field	Operand	Value
Item Code	All	
Bin Location	All	
Region Code	All	
Aisle	All	
Quantity On Hand	All	

Transfer Mode

Item	Whse	Description	Rep...	Replenis...	AddQty	TotalRep...	FromBin	ToReple...	Transfe...	Dest...	Dest On...	Dest All...	Replenish Description
4886-18-14-3	000	PAPER CADDY 18"...	Yes	94.00	20.00	114.00	C10L	A60M	64.00	Pri-Pick	.00	.00	<=ItemMin:10, <ItemMax:100, AddToC
6650-28-16-11	000	SOUND CVR 26"W...	Yes	59.00	20.00	79.00	C10L	A60M	54.00	Pri-Pick	.00	.00	<=ItemMin:10, <ItemMax:100, AddToC
6652-28-24-15	000	SOUND CVR 28"W...	Yes	20.00	20.00	40.00	C10L	A60M	15.00	Pri-Pick	.00	.00	<=ItemMin:10, <ItemMax:100, AddToC

Totals	No of Entries	Replenish Calc	Additional	Replenish Total	Total Transfer	On S/O	Required S/O	On Mfg	Required Mfg
Totals	3.00	.00	60.00	60.00	133.00	20.00	20.00	.00	.00

Replenish Diagnostic: gives you immediate understanding on the internal parameters that when into the system calculated replenishments.

Multiple Selections: Click multiple selections with Control-click and Shift-click. Click the select the green All button to select all inventory; red to clear selections.

Quick Print: Prints quick pick and put away sheets.

Hold/Go: The hold button will hold selections so other inventory can be deleted or added to the selections on all selected.

Edit Button: Edit button changes selections quickly and only for the lines selected.

More replenishment and putaway Options and Options are kept for each putaway batch. Options give more flexibility to putaway and the algorithms desired. Control and Shift Click multiple lines at once control/overrides.

Selections and Quantity

Replenish Primary Bin Locations Only

increase putaway qty for the destination qty allocated

Check Destination Location Capacity

Zero Minimum means to always select item to replenish

Zero Max means no maximum quantity select to transfer

Use Quantity on Order and Manufacturing when greater

Percent Increase from Quantity Required

Save Options

Save changes to Company

Save changes to Batch

Replenishment Inventory Allocation Rules

Valuation Allocation Rules:

Non Lot Serial Items

Lot Serial Items

Primary Locations Other Area Locations

Pick Area Locations Floor Area Locations

Overflow Area Locations Staging Area Locations

Include Held and Pick Restricted Goods

For replenishment inventory allocations:

Include Inventory on Hold Include Restricted Customer Locations

Include Disabled for S/O Locations Include Restricted by Date

Include Disabled for Mfg Locations Include Restricted Trans with Bin Locations

*Premium version is required for directed picking and directed putaway features