

# 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.

**S Transaction Allocation Overrides**

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

Override All    Dflt Type: PAL    Dflt Masters:

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

Accept    Cancel    Delete

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

Order Number: 0000227    Customer: 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

Allocation Overrides

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.

**S \* 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    Inactive Reason:

Data Entry

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

Item Code: WIDGET

Primary Payment Information

Payment ID:    Payment Type:    Name:    Last Four Digits:    Expiration Date:    Credit Cards/ACH...

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-MSD	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**

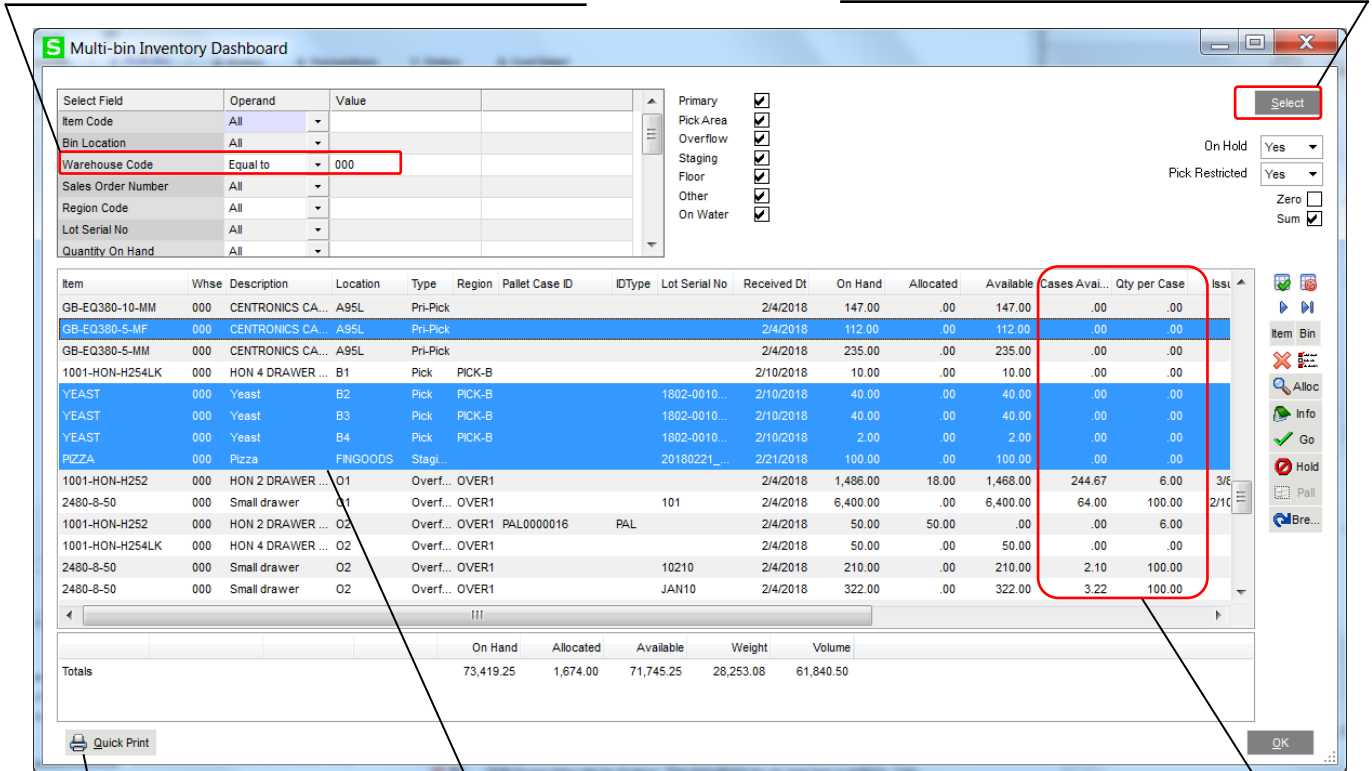
\*Premium version is required for directed picking and directed putaway features

# 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 the inventory in the dashboard.

**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 because only the lines you change are refreshed.

**Case Quantity Avail and Qty per Case:** Case calculations based on pick and put case pack settings for Overflow and Other Location Types/Areas.

Select Field	Operand	Value
Item Code	All	
Bin Location	All	
Warehouse Code	Equal to	000
Sales Order Number	All	
Region Code	All	
Lot Serial No	All	
Quantity On Hand	All	
Quantity Available	All	
Quantity Allocated	All	
Pallet ID	All	
ID Type	All	
Last Received Date	All	
Product Line	All	
Est Date Received - OTW	All	
Vendor Lot Serial No	All	
Lot Serial Expire Date	All	

**Sales Order Number:** Selects available inventory for the items on the selected sales orders.

**Lot Serial No:** Selects the location of all inventory for Lot Serial numbers.

**Last Received Date:** Selects available inventory based on when goods were received.

**Est Date Received—OTW:** Using the On The Water and Container add-on selects inventory based on the estimated date when intransit inventory will be received.

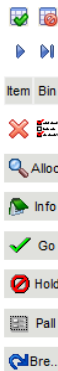
**Vendor Lot Serial No and Expire Date:** Used with the Expiration Date Vendor Lot Traceability add-on — the fields selects inventory based on when goods will expire or the second Lot Serial No field.

On Hold  Yes  No  
 Pick Restricted  Yes  No  
 Zero   
 Sum

**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 putaway is faster with the more built-in indexes and offers more options.

**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.

**Putaway Entry in Receipt of Goods for Staging Receipts** provides Putaway Location in distribution along side your regular receipts entry. Use Putaway when receiving to a staging location and you require to pass the desired putaway location. Putaway can be viewed via the Receiving location, printed on the Purchase Order Putaway Report and via the directed putaway system and putaway reports. Putaway locations can be preselected in Purchase Order entry Lines tab. Those entries automatically pass thru to receiving.

**Auto Allocated Locations Receipt of Goods** When Directed Putaway is enabled the system can auto assign the putaway location which will evaluate capacity of the locations and your putaway preferences.

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