Order Allocation

The Order Allocation module assists with the allocation of inventory to customer orders. It allows incoming stock (purchase orders) as well as existing inventory on hand to be selected and allocated to customer sales orders and back orders.

The Order Allocation module is one in a range of modules, collectively known as the SP Toolkit, that are designed to assist with inventory and warehouse management.
**Overview**

The module is based on a wizard to guide the user through a sequence of steps. Incoming purchase orders as well as inventory items to be included in the allocation process can be selected by various criteria. The total available for allocation can then be reviewed before selecting the outstanding sales orders and backorders.

The system then automatically allocates the available stock to the selected sales orders. The allocation can then be reviewed and if necessary an alternative allocation method can be selected and the stock re-assigned.

The automatic rules for allocating the stock include:

- Assign to oldest orders first by order date
- Assign to oldest orders first by due date
- Assign to oldest orders but with selected customer preference
- Assign to oldest orders for selected customer group
- Assign only if all items on the order can be fulfilled

Once the program has automatically assigned the stock, the operator can review the allocation by product, customer, order number, due date etc. An override facility allows stock to be manually re-assigned by the user, thereby allowing available stock which is insufficient to meet all requirements, to be assigned as required.

<table>
<thead>
<tr>
<th>Key Features</th>
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<tr>
<td>The user can quickly select incoming purchase orders as well as inventory on hand by various criteria.</td>
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<td>The module automatically allocates available stock to sales orders and back orders by various criteria.</td>
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<td>The operator can override the allocation by selecting items in the allocation and manually re-allocating the stock to selected sales orders.</td>
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<td>Picking slips can be printed individually or combined for the same customer.</td>
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<td>Picking slip layout designed using built in Report Builder.</td>
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<td>The final allocation can be processed to reserve the stock and to prepare the sales orders ready for invoicing.</td>
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When the allocation has been finalised, the user is then able to print picking slips for either selected or all sales orders. Orders for the same customer can optionally be combined onto a single picking slip and the sequence of the products can also be specified.

The final step in the process updates the sales orders. This process performs two functions. Firstly, it reserves the stock so that it is no longer available for subsequent allocations. Secondly, it saves the allocation quantities against the sales orders so that they are ready for invoicing. The operator simply needs to review the orders and process the invoice.