



# 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.

Evolution Warehouse Toolkit - Order Allocation : EvoSample

Purchase Orders | Inventory | Inventory to Allocate | Sales Orders | Allocate | Print | Process | Help

Refresh Last Automatic Allocation: 'Oldest Order Date First' Allocate Inventory to Sales Orders

Drag a column header here to group by that column

Item Code	Description	Group	Cust. Co	Customer Name	Order No.	Order Date	Due Date	Qty on Sales Order	Qty Allocated
1	Erasers	Office Product	2	A.F. Timber Company	S00027	03/03/2004	03/03/2004	1	1
01CC	Car Charger	Accessories	120	Artists Supplies	S00040	11/03/2004	11/03/2004	1	0
2	Paperclips	Office Product	120	Artists Supplies	S00040	11/03/2004	11/03/2004	1	1
1	Erasers	Office Product	655	Bertie Coffee Kitchen	S00064	10/08/2004	10/08/2004	1	1
01HF	Hands Free Kit	Accessories	107	Caravan Hire	S00019	01/03/2004	01/03/2004	5	1
004	Bouquet - Assorted Number 3	Flowers	107	Caravan Hire	S00015	16/02/2004	16/02/2004	100	54
01LC	Leather Case	Accessories	107	Caravan Hire	S00003	05/02/2004	05/02/2004	4	1
1	Erasers	Office Product	107	Caravan Hire	S00004	05/02/2004	05/02/2004	4	4
2	Paperclips								5
6880	Spark Plug - 35 Mm								10
5050	Pine 25mmx75mm Planed								10
5060	Pine 25mmx150mm Planed								27
123	Test Item								1
05FIT550-4	Tempest fixed leg TB9GLGL								5
OMHT10015075-L07	TEMPEST RECT TOP 1500								1
TRIOLOGY=SS03894	Trilogy workstations as per w								3
369 T1-1	Classic 369T1 glass table 65								1
1	Erasers								1
1	Erasers								1
5050	Pine 25mmx75mm Planed								2
1	Erasers								2
1	Erasers								1
CABLE	CABLE								100
1	Erasers								2
1	Erasers								2
001	Bouquet of Roses	Flowers	102	Mueller Components	S00053	10/06/2004	10/06/2004	3	3
002	Bouquet - Assorted Number 1	Flowers	102	Mueller Components	S00053	10/06/2004	10/06/2004	1	1
003	Bouquet - Assorted Number 2	Flowers	102	Mueller Components	S00047	13/05/2004	13/05/2004	1	1
004	Bouquet - Assorted Number 3	Flowers	102	Mueller Components	S00047	13/05/2004	13/05/2004	3	0
1	Erasers	Office Product	102	Mueller Components	S00024	03/03/2004	03/03/2004	2	2

Allocate to an Item

**01CC / Car Charger**

Qty Available to Allocate: 386 Qty Already Allocated: 386 of 386

Qty Required for Sales Orders: 402

Short Fall: 16

Cust. Code	Customer	Order No.	Order Date	Due Date	D/S Sls Ord Qty	Allocated Qty
106	Wilbur A Culpepper	S00017	17/02/2004	17/02/2004	400	386
120	Artists Supplies	S00040	11/03/2004	11/03/2004	1	0
106	Wilbur A Culpepper	S00041	16/03/2004	16/03/2004	1	0

OK Cancel

Close Prev Step Next Step

Allocate Inventory to Sales Orders Current Warehouse: [Mstr : Master Warehouse]

## 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.

<b>Key Features</b>
<ul style="list-style-type: none"><li>• The user can quickly select incoming purchase orders as well as inventory on hand by various criteria.</li></ul>
<ul style="list-style-type: none"><li>• The module automatically allocates available stock to sales orders and back orders by various criteria.</li></ul>
<ul style="list-style-type: none"><li>• The operator can override the allocation by selecting items in the allocation and manually re-allocating the stock to selected sales orders.</li></ul>
<ul style="list-style-type: none"><li>• Picking slips can be printed individually or combined for the same customer.</li></ul>
<ul style="list-style-type: none"><li>• Picking slip layout designed using built in Report Builder.</li></ul>
<ul style="list-style-type: none"><li>• The final allocation can be processed to reserve the stock and to prepare the sales orders ready for invoicing.</li></ul>

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.

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