Blocked Items

Cavallo Support - 2024-11-22 - System

Overview

Blocked Items functionality allows an authorized user to block the automatic allocation of an item on a sales document. This function is used when there is a limited quantity of an item available and a company wants to prioritize item allocation to specific customers. An item that has been marked as blocked will be backordered when added to a sales line, until an authorized user allocates the item.

Note: Please contact your Account Manager to discuss getting a resource for any custom SQL scripts and/or Quick Reports for Blocked Items.

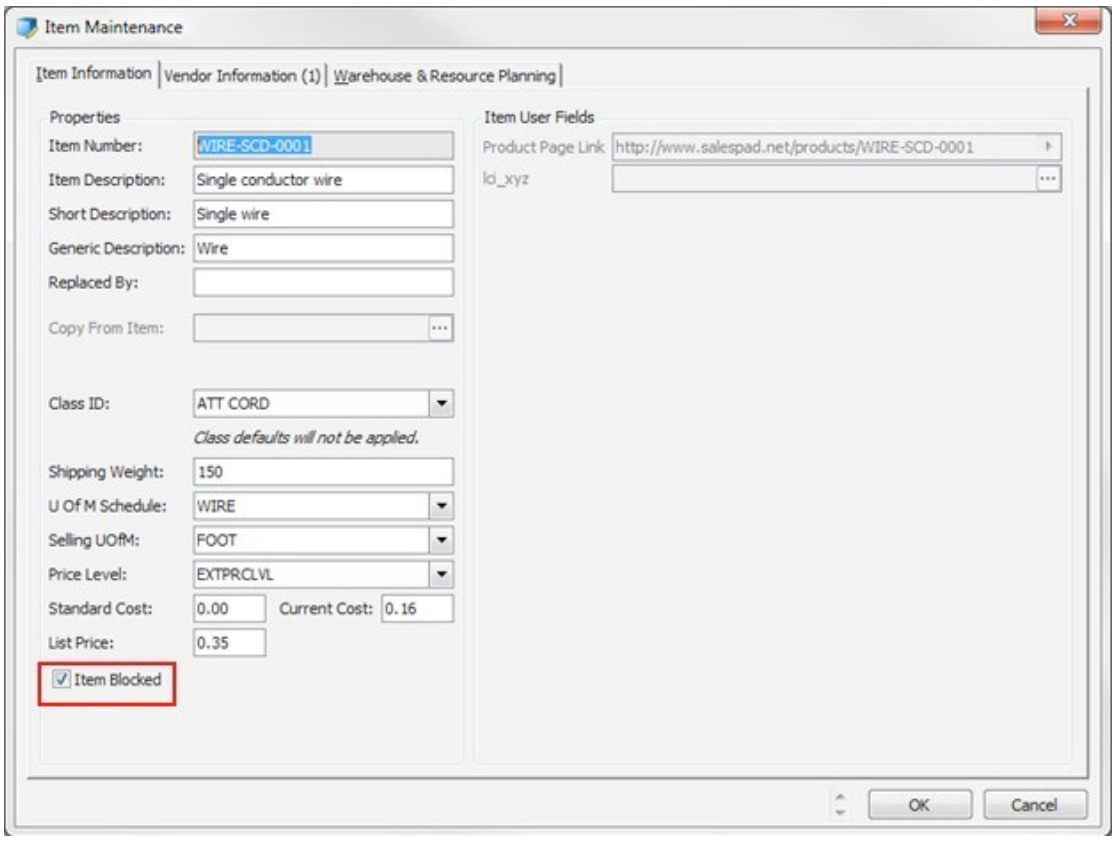
Note: Blocked items are automatically backordered and rely on the Qty Unblocked. They DO NOT work in conjunction with the setting for Backorder Document Type ID, which will backorder a line item if any values are changed on the line after a save.

Use

If an item is Blocked, the Backordered quantity equals the quantity on the line item minus any available quantity. If an item is not blocked, the total quantity will be allocated. Fulfillment is limited by the available quantity – users cannot fulfill more than the available quantity.

BLOCKING ITEMS

Items can be marked as blocked on the Item Maintenance screen (open Inventory Lookup, search for and select the item, open the Item Properties Tab and click the ellipsis (**...**) next to Item Number Field):



UNBLOCKING BLOCKED ITEMS

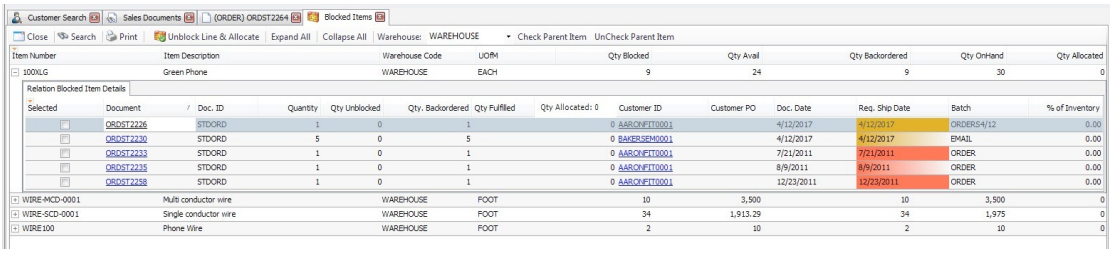
When a blocked item is added to a sales document, it will be backordered. Then the authorized user can manually determine which customer will receive quantities of the item or items and can unblock quantities as needed.

Users can unblock a blocked item in three ways:

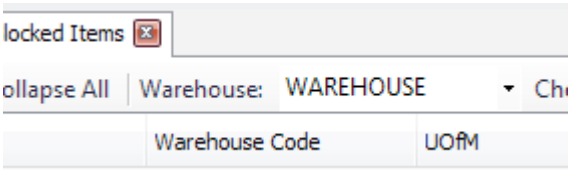
- From the Blocked Items Report module: Select a blocked item or items and click **Unblock Line & Allocate** (Security Editor: Under *Blocked Items Report*, *Can Unblock And Allocate* must be set to True). This will also Allocate other line items on the same document, except for other blocked items. Multiple blocked items from the same document can be selected in the Blocked Items Report.*
- From the "Sales Document Entry" screen – one item at a time: On the line item, change the quantity under the Qty Unblocked column on the line item (Security Editor: Under *Sales Document Line Items*, *Can Change Unblocked Quantity* must be set to True). In addition, you must change the quantity under the Qty Fulfilled column.
- From the "Sales Document Entry" screen – many items at a time: If *Sales Document Entry* > *Unblock and Allocate* is set to True in the Security Editor, use the **Allocate** button to unblock any blocked items and allocate all lines on a sales document. If *Unblock and Allocate* is set to False, only non-blocked items will be allocated.

*BLOCKED ITEMS REPORT

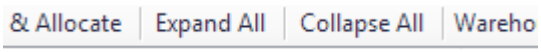
To open the "Blocked Items" screen, go to Modules > Inventory > Blocked Items Report**:**



Organized by warehouse, items with quantity currently blocked on any sales documents will be listed on the grid. Use the Warehouse dropdown to change the warehouse shown:



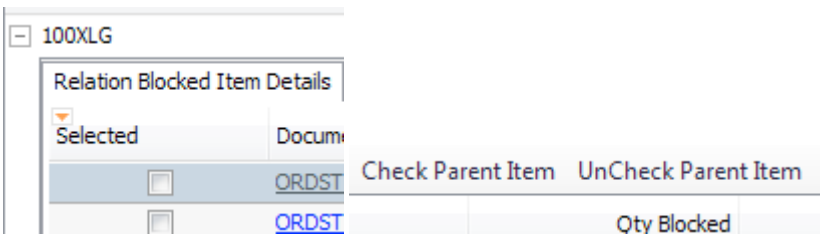
Use the +/- to the left of the item number to expand the displayed details to show (or hide) a list of each document containing the blocked item. The **Expand All** and **Collapse All** buttons can be used to expand or collapse all item details at once:



Allocating Blocked Items

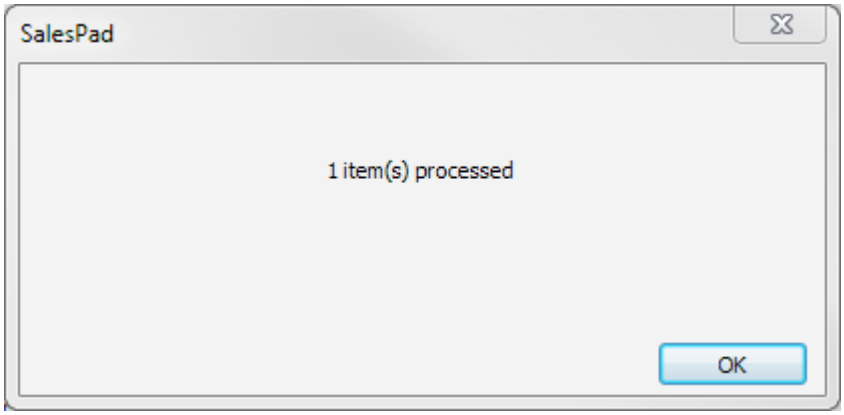
Within an item list, you can change the Qty Unblocked column to indicate how many should be unblocked for each line.

Check the box in the Selected column next to the item or items to be allocated (or click on an Item Number and click the **Check Parent Item** button to select all documents containing the selected blocked item):



Then click the **Unblock Line & Allocate** button. This will process allocations for the item(s) on the selected

document(s). When allocation is complete, the following message will appear:



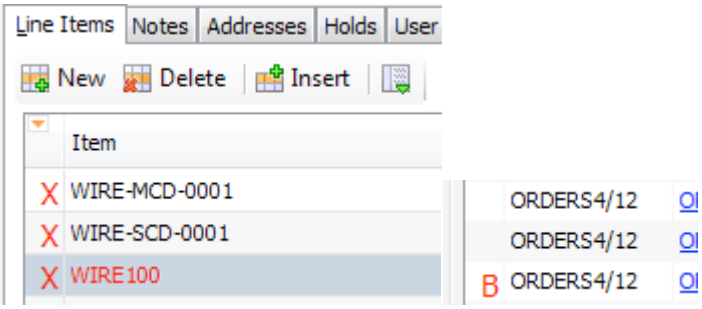
Click **OK** and the Blocked Items screen will refresh, removing any allocated documents/items from the display. These items will now be allocated.

Printing

With proper security, the Blocked Items screen can be printed, exported, or sent via email. Click **Print** to access a print preview and click the appropriate icon to print, export, email, etc.

SALES DOCUMENT ENTRY - BLOCKED ITEMS

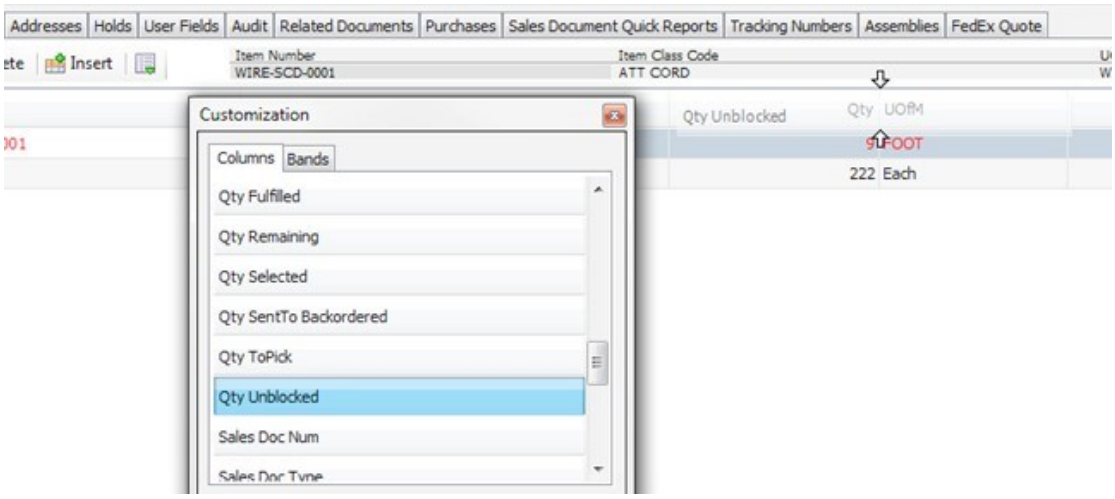
A blocked item on a sales document is indicated by a red X (or B, depending on how old your version of 4.2 is) on the left side of the line:



The indicator will also appear on the line on the "Sales Line Mass Update" screen.

With proper security, some or all of the line item quantities can be unblocked by changing the number in the Qty Unblocked column.

To add the Qty Unblocked column to the grid, right-click on the column headers and select Column/Band Chooser. Drag and drop the Qty Unblocked column from the "Customization" window onto the column headers:



With proper security, the **Allocate** button can also be used to allocate all blocked items (and all other items on the document).

Expected Behavior for Blocked Items

Start: The pre-save values
Change: The value that is changed
After: The expected values after saving

		Quantity	Qty Back Order	Qty Allocated	Qty Unblocked	Qty Fulfilled
	Start	1	0	0	0	0
Adding Item	Change	10	0	0	0	0
	After	10	10	0	0	0
	Start	10	10	0	0	0
	Change	15	10	0	0	0
	After	15	15	0	0	0
	Start	10	8	2	2	0
Increase quantity	Change	15	8	2	2	0
	After	15	13	2	2	0
	Start	10	0	10	10	0
	Change	15	0	10	10	0
	After	15	5	10	10	0
	Start	10	10	0	0	0
	Change	8	10	0	0	0
	After	8	8	0	0	0
	Start	10	8	2	2	0
Decrease Quantity	Change	8	8	2	2	0
	After	8	6	2	2	0
	Start	10	8	2	2	0
	Change	1	8	2	2	0
	After	1	0	1	1	0
	Start	20	10	10	10	0
	Change	20	10	10	5	0
	After	20	15	5	5	0
Decrease Unblocked						
	Start	20	10	10	10	0
	Change	20	10	10	0	0
	After	20	20	0	0	0
	Start	20	10	10	10	0
	Change	20	10	10	12	0
	After	20	8	12	12	0
Increase Unblocked	Start	20	20	0	0	0
	Change	20	20	0	5	0
	After	20	15	5	5	0
Fulfilled Increase Decrease Unblocked w/Fulfilled quantity						
	Start	12	6	6	6	0
	Change	12	6	6	6	2
	After	12	6	6	6	2
	Start	12	6	6	6	0
	Change	12	6	6	6	12
	After	12	6	6	6	6

	Quantity	Qty Back Order	Qty Allocated	Qty Unblocked	Qty Fulfilled
Start	12	12	0	0	0
Change	12	12	0	0	5
After	12	12	0	0	0
Start	12	10	2	2	2
Change	12	10	2	1	2
After	12	11	1	1	1

Security

*Blocked Items Report** – enables the Blocked Items Report module, where users can view and manage blocked items and allocations.

Sales Document Line Items > *Can Change Unblocked Quantity* – enables users to change the unblocked quantity on a sales document line (Qty Unblocked column).

Sales Document Entry > *Unblock And Allocate* – enables users to unblock blocked items on sales documents and allocate them using the Allocate button. All items on the document will allocate. If False, the allocate button will only allocate non-blocked items.