Document Combiner

Cavallo IT - 2024-12-03 - Sales

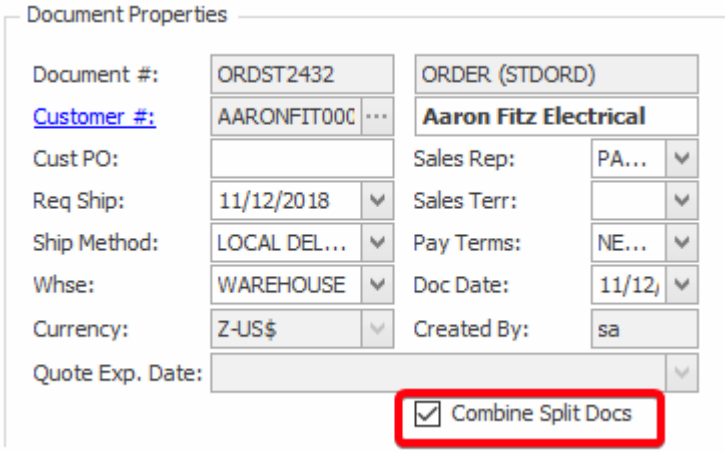
Overview

The Document Combiner plugin is used to combine split documents into a single document. The final document will contain all line items, payments, resources, tracking numbers, and some other information from the original documents. The plugin only works for documents that have been split using the Split Sales Document plugin, and only for quotes, orders, and invoices. This plugin can be run from the Action Menu dropdown on a sales document, or it can be triggered through workflow.

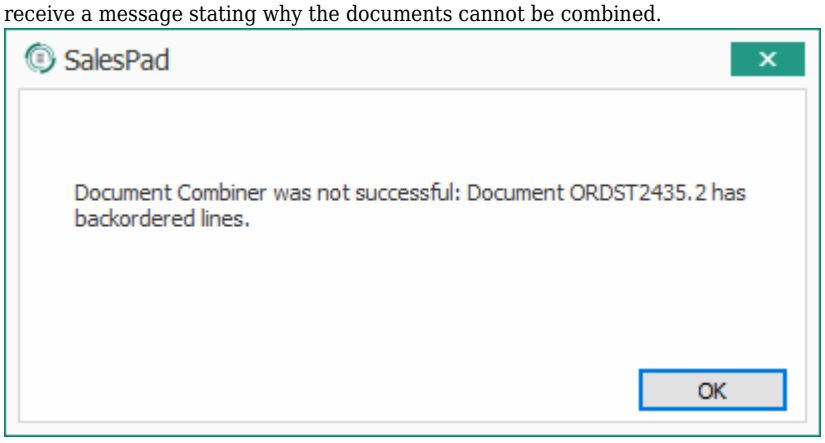
Usage

In order to combine documents, the following criteria must be met:

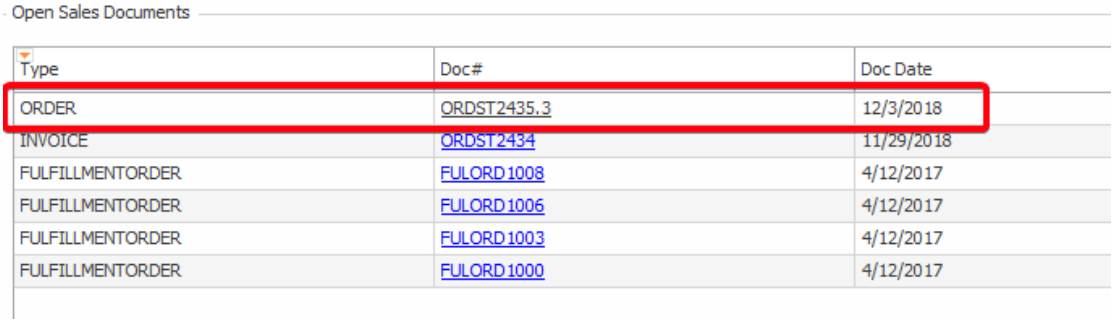
- Each of the documents needs to have the same master number. Generally, this means that the documents share a parent document somewhere in the Related Documents tab.
- The document must have no applied holds.
- Each line item must be completely fulfilled (e.g. no backordered quantity).
- Each document must be in a batch specified in the *Sales Document Combine Batch* security, and each document must be in the same batch.
- The Combine Split Docs sales document header checkbox, which can be added to the sales document layout, must be checked for each document that is to be combined. This check is in place in case there are related documents that you do not wish to be combined.



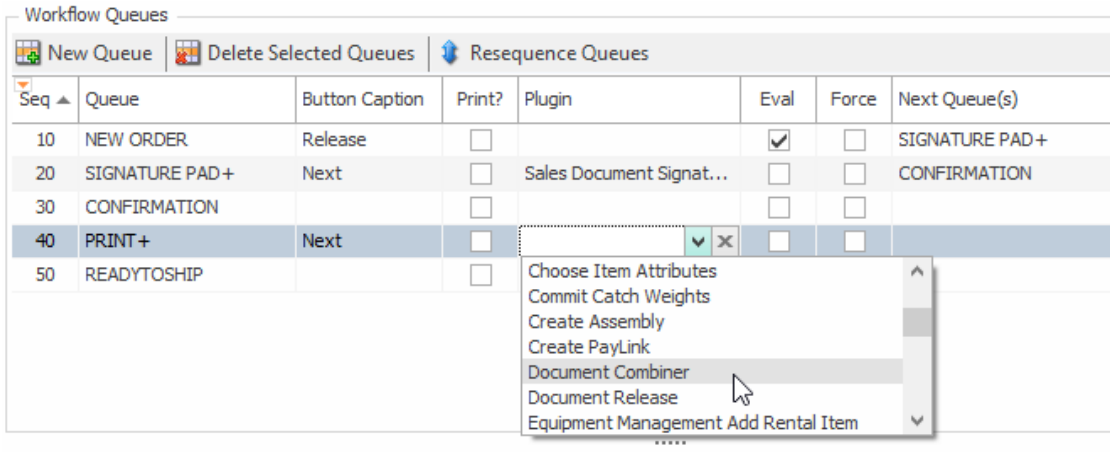
Once all this criteria has been met, users can choose the Document Combiner plugin from the Action Menu on any of the sales documents, and the documents will combine. If any of the criteria has not been met, users will receive a message stating why the documents cannot be combined.



Once the documents have been successfully combined, the new document will appear in the open sales documents grid.



The document combiner plugin can also be triggered through workflow.



After the documents have been combined, the original documents will be made historical, and the combined document will be placed in the batch that the uncombined documents were in. If the plugin was triggered through workflow, the combined document will be pushed through workflow as normal.

Requirements for Lines to be Combined

With the proper configuration, sales line items can be combined when combining documents. The criteria for combining sales lines is as follows:

- Item Numbers are the same
- Item Descriptions are the same
- Unit Prices are the same
- Unit of Measures are the same
- Warehouse Codes are the same
- No sales line purchase order links (SOP to POP links)
- No sales line manufacturing links (SOP to MOP links)
- If part of a package, the sales line item package smart fields must have the same values

Security

Automatically Transfer Combined Order To Invoice – When enabled, the combined order document will automatically be transferred to an invoice. Defaults to False.

Automatically Transfer Combined Quote To Order – When enabled, the combined quote document will automatically be transferred to an order. Defaults to False.

Combine Similar Lines – When enabled, line items with the same Item Number, Unit of Measure, and Warehouse will attempt to be combined into a single line item. Defaults to False.

Sales Document Combine Batch – Specifies sales batches that documents can be in to proceed with Document Combining. Each document must be in the same queue to combine. Defaults to ''.

Void Originating Documents – When enabled, the originating documents use to create the combined document will be voided rather than moved to history. Defaults to False.

Additional Sales Line Fields Required to Combine - A list of additional fields that are required to be equivalent before lines will be combined. (No default)