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Fulfillment Plugin Serial and Lot User Fields in Available to Pick Grid

Megan De Freitas - 2024-11-22 - <u>Sales</u>

Overview

A new Fulfillment plugin brings new functionality to the Fulfillment feature in a new order, so that user defined fields from Serial and Lot items now populate in the Available to Pick Grid. A Column Chooser allows you to add the Lot and Serial Number user defined fields.

Setup

Security

Open the Security Editor and enable *Sales Fulfillment*. You will see the *Serial Attribute Columns* functionality described.

~ S	select All 🛑 Select None	🚽 Copy From	>>
Ăcc	Name		~ 🛛
	Sales Fulfillment*		
	Containe/Name) 'Sales Fulf		E lu etu
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Usage

Open the Customer Card you want to use and click on Distribution Order to create a new order. Choose (or search for) the Item or Items you want to add to the order. In the example below, the item WIRE- MCD- 0001, a lot-controlled item, is chosen.

IIマ Ar SalesPad Today Sear	pplication Sales Documents Sales Monitor Sales Sales Sales	iales Batch Processing Solates Transfer Inventory	alysis nsfers vendor Search Sackordered Purchasir	د 7/1 er Search dvisor Items g ی	7/2013 v4.2.0.8 Quick Sales Reports Analysis Reports a	sa (1 of 99 seats i	n-use) 📑 🍘
🔏 Customer S	Search 🗙 🌡 Card: [AARONF Save 🖓 Print 🗐 🎼	FIT0001] Aaron Fitz Electrical 🔟 🗋 (ORD Fulfillment 🛛 🖼 Sales Line Excel Impor	DER) 🗙 t 🚧 Back 📓 Tasks 🎝	Delete 🗅 Copy	🔒 Allocate 🛞 Un Allo	cate	🔷 Release
Document Prop Document #: Customer #: Cust PO: Reg Ship: Ship Method:	AARONFIT0001 7/17/2013 FEDEX GROUND	ORDER (DISTRIBUTION) Aaron Fitz Electrical Sales Rep: IAN M. ▼ Pay Terms: NET 30 ▼ ▼ Doc Date:	Shipping Address Aaron Fitz Electrical Robert Fitz Jr. 1201 56th Ave. Chicago, IL 60603-0776 P:(312) 555-0102 F:(312) 555-0102	Additional Prop Batch/Q: Price Level: Discounts:	PENDING ORDER RETAIL × No Holds	Totals - GM: [\$200.0 Misc Charge: Discounts: Freight: Tax: Total:	0] [100.00%] · · · · · · · · · · · · · · · · · · ·
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Ine Items Not	tes Addresses Holds User Fi Delete 🏥 Insert 🏢 L V2 V3	ields Audit Related Documents Purchase Item Number II WIRE-MCD-0001 C	es Quick Report Tracking Numbers tem Class Code COMPONENT2	UOfM Schedule	2uote	A vailable 22,890.00	Onhand 28,230.00
Item WIRE-MC	Descrip 2D-0001 Multi co	ption onductor wire	Qty UOfM Pr 1 SPOOL 200	ce Cost 00 0.00	Ext Price Reg Ship 200.00 7/17/2013	Qty BO	Comment

In the new order screen, click on the **Fulfillment** button.

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locument #: Customer #: Cust PO:	AARONFIT0001		ORDER (DIST Aaron Fitz E Sales Rep:	RIBUTION)		Aaron Fitz Electrical Robert Fitz Jr. 1201 56th Ave. Chicago, IL 60603-0776	^	Batch/Q: Price Level:	PENDING ORDER	Misc Charge:	0.00
leq Ship: hip Method: Vhse:	7/17/2013 FEDEX GROUND WAREHOUSE	• • •	Pay Terms: Doc Date: Created By:	NET 30 7/17/2013 sa	•	P:(312) 555-0102 F:(312) 555-0102	Ŧ	Discourts.	No Holds	Tax: Total: Payment:	0.00 196.00 0.00
ne Items Not	es Addresses Holds Delete	Jser Fields	Audit Related Item Number WIRE-MCD-000	Documents Purc	thases Item COM	Quick Report Tracking Nu Class Code IPONENT2	imbers En	UOfM Schedul SPOOL	e Quote	A vailable 22,690.00	On 28,2
(ALL) [0] V1	V2 V3										

This brings up the "Sales Fulfillment" window, where you can see Serial and Lot tracked user fields for the item in the Available to Pick grid.

em N Descr Qty	Lot Number	Qty Avail /	Bin	Distributor	Lot Attribute 3	Location	Date Received	Lot Expiratio	Manufacture
IRE-M Mult 1									
	LOT1	4	DOCK			WAREHOUSE	4/12/2017		
	012610-A	5	DOCK			WAREHOUSE	1/26/2010		
	1001_100	6	DOCK			WAREHOUSE	2/12/2009		
	1235	10	DOCK			WAREHOUSE	4/12/2017	1/14/2014	
	LOT1	11	DOCK			WAREHOUSE	4/12/2017		
	LOT1	12	DOCK			WAREHOUSE	4/12/2017		
	0001	69	DOCK			WAREHOUSE	12/10/2009		
	00441355	86	A100			WAREHOUSE	1/14/2014		
	LOT1	87	DOCK			WAREHOUSE	4/18/2014		
	44501	98	D102			WAREHOUSE	1/14/2014		
	442266	98	D102			WAREHOUSE	1/14/2014		
	8844666	98	DOCK			WAREHOUSE	1/14/2014		
	98989989898989	99	DOCK			WAREHOUSE	11/3/2010		
	111155	100	D102			WAREHOUSE	1/14/2014		
	0002	100	DOCK			WAREHOUSE	12/10/2009		
	567890	120	DOCK			WAREHOUSE	4/12/2017		
	LOT1	800	A100			WAREHOUSE	4/18/2014		
	LOT B	999	A100			WAREHOUSE	1/24/2017		
	1	1,000	A100			WAREHOUSE	1/24/2016		
	A200	4,800	DOCK			WAREHOUSE	4/12/2017		
	050212A	5,000	DOCK			WAREHOUSE	5/8/2012		
	A201	6,801	DOCK			WAREHOUSE	4/12/2017		
	050212B	7,000	DOCK			WAREHOUSE	5/8/2012		

Right-Click on the Available to Pick pane and select Column Chooser.

lect a line item:	Available to Pick (double-dick or use button	to select):						
tem N Descr Qty	Lot Number /	Qty Avail Bin	∮ ↓ Sort Ascending	ttribute 3	Location	Date Received	Lot Expiratio	Manufacture Dat
/IRE-M Mult 0			Z Sort Descending			Date Received Lot Expiratio Manufacture Date E 12/10/2009 E E 1/14/2014 E E 5/8/2012 E F 1/24/2016 E		
	0001	69 DOCK	AF ON Descripting WAREHOUSE 12/10/2009 100 DOCK Clear Sorting WAREHOUSE 12/10/2009 86 A100 Clours Drug By This Column WAREHOUSE 1/14/2014 5 DOCK Show Group By Box WAREHOUSE 1/14/2014 6 DOCK Show Group By Box WAREHOUSE 1/14/2014		WAREHOUSE	12/10/2009		
	0002	100 DOCK						
	00441355	86 A100	😑 Group By This Column	Group By This Column WAREHOUSE 1/14/20.14 show Group By Box WAREHOUSE 1/26/20.10 Remove This Column WAREHOUSE 5/8/20.12 Column Chooser WAREHOUSE 5/8/20.12 Column Chooser WAREHOUSE 1/24/20.16 Set Fit WAREHOUSE 2/12/2009				
	012610-A	5 DOCK	📇 Show Group By Box					
	050212A	5,000 DOCK	Remove This Column					
	050212B	7,000 DOCK	Remove this column					
	1	1,000 A100	Column Chooser					
	1001_100	6 DOCK	Best Fit					
	111155	100 D102	Best Fit (all columns)		WAREHOUSE	1/14/2014		
	1235	10 DOCK	Tilter Editor		WAREHOUSE	4/12/2017	1/14/2014	
	442266	98 D102	Show Find Danel		WAREHOUSE	1/14/2014		
	44501	98 D102	Lide Auto Filter Deux		WAREHOUSE	1/14/2014		
	567890	120 DOCK	Hide Auto Filter Row		WAREHOUSE	4/12/2017		

A Customization window pops up, from which you can choose user defined fields (such as Receipt date or Unit Cost) to add to the Available to Pick grid.

Tot Number	/	Oty Avail	Bin		Distributor	Lot Attribute 3	Location
Lot Hamber		20,700	2		Distributor		Location
0001		69	DOCK				WAREHOUSE
0002		100	DOCK				WAREHOUSE
00441355		86	A100				WAREHOUSE
012610-A		5	DOCK				WAREHOUSE
050212A		5,000	DOCK				WAREHOUSE
050212B		7,000	DOCK				WAREHOUSE
1		1,000	A100				WAREHOUSE
1001_100		6	DOCK				WAREHOUSE
111155		100	D102	Customiza	ation	E	WAREHOUSE
1235		10	DOCK	Date Reco	ot Seg		WAREHOUSE
442266		98	D102				WAREHOUSE
44501		98	D102	Lot Attribu	ute 5		WAREHOUSE
567890		120	DOCK	Receipt da	ate		WAREHOUSE
8844666		98	DOCK	Unit Cost			WAREHOUSE
98989989898989		99	DOCK	Offic Cost			WAREHOUSE
A200		4,800	DOCK	Wire quali	ty		WAREHOUSE
A201		6,801	DOCK				WAREHOUSE
LOT B		999	A100				WAREHOUSE

As an example, double-click on Unit Cost. A new Unit Cost Field is automatically added to the Available to Pick grid.

Unit Cost	Lot	Recei	Date Rec	Manufa
0.54			7.00	
0.54			8.00	
0.54			9.00	
0.54			2.00	
54.00			16,384.00	
0.54			6.00	
12.00			16,384.00	
12.00			32,768.00	
12.00			16,384.00	
13.00			16,384.00	
0.55			32,768.00	
0.56			49,152.00	
10.00			16,384.00	
0.22			65,536.00	
0.22			65,537.00	
0.54			10.00	
0.54			4.00	
0.54			2.00	
0.54			2.00	
0.19			16,384.00	
0.19			32,768.00	
0.19			81,921.00	
0.00			98,305.00	