



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

Megan De Freitas - 2024-11-22 - Sales

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.

Security

✓ Select All

✗ Select None

Copy From...

»

Acc...

Name

▼

✓

Sales Fulfillment*

✗

Contains([Name], 'Sales Fulfillment')

▼

Edit Filter

▲ Misc

Read Only

False

▶ Serial Attribute Columns

String[] Array

...

Show Cost

True

Start Maximized

True

▲ Scripts

On Close Script

Serial Attribute Columns

A list of Serial Attribute columns to show.
Defaults to 'n/a'.

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.

The screenshot shows the 'New Order' screen. The top toolbar has a 'Fulfillment' button highlighted. The main window displays order details for 'Aaron Fitz Electrical' (Card: [AARONFIT0001]). The 'Document Properties' section shows 'ORDER (DISTRIBUTION)' and 'Aaron Fitz Electrical'. The 'Shipping Address' section shows 'Aaron Fitz Electrical, Robert Fitz Jr., 1201 56th Ave., Chicago, IL 60603-0776'. The 'Additional Properties' section shows 'Batch/Q: PENDING ORDER', 'Price Level: RETAIL', and 'Discounts:'. The 'Totals - GM: [\$200.00] [100.00%]' section shows 'Misc Charge: 0.00', 'Discounts: 4.00', 'Freight: 0.00', 'Tax: 0.00', 'Total: 196.00', and 'Payment: 0.00'. The 'Line Items' section shows a table with columns: Item, Description, Qty, UoM, Price, Cost, Ext Price, Req Ship, Qty BO, Comment. The table contains one item: 'WIRE-MCD-0001' (Multi conductor wire), Qty 1, UoM SPOOL, Price 200.00, Cost 0.00, Ext Price 200.00, Req Ship 7/17/2013, Qty BO 0.

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

The screenshot shows the 'Sales Fulfillment' window. The top toolbar has a 'Fulfillment' button highlighted. The main window displays order details for 'Aaron Fitz Electrical' (Card: [AARONFIT0001]). The 'Document Properties' section shows 'ORDER (DISTRIBUTION)' and 'Aaron Fitz Electrical'. The 'Shipping Address' section shows 'Aaron Fitz Electrical, Robert Fitz Jr., 1201 56th Ave., Chicago, IL 60603-0776'. The 'Additional Properties' section shows 'Batch/Q: PENDING ORDER', 'Price Level: RETAIL', and 'Discounts:'. The 'Totals - GM: [\$200.00] [100.00%]' section shows 'Misc Charge: 0.00', 'Discounts: 4.00', 'Freight: 0.00', 'Tax: 0.00', 'Total: 196.00', and 'Payment: 0.00'. The 'Line Items' section shows a table with columns: Item, Description, Qty, UoM, Price, Cost, Ext Price, Req Ship, Qty BO, Comment. The table contains one item: 'WIRE-MCD-0001' (Multi conductor wire), Qty 1, UoM SPOOL, Price 200.00, Cost 0.00, Ext Price 200.00, Req Ship 7/17/2013, Qty BO 0.

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.

Sales Fulfillment - D6738

Select a line item:

Item N...	Descr	Qty
WIRE-M...	Mult...	1

Available to Pick (double-click or use button to select):

Lot Number	Qty Avail	Bin	Distributor	Lot Attribute 3	Location	Date Received	Lot Expiration...	Manufacture ...
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		
9898989898989	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		

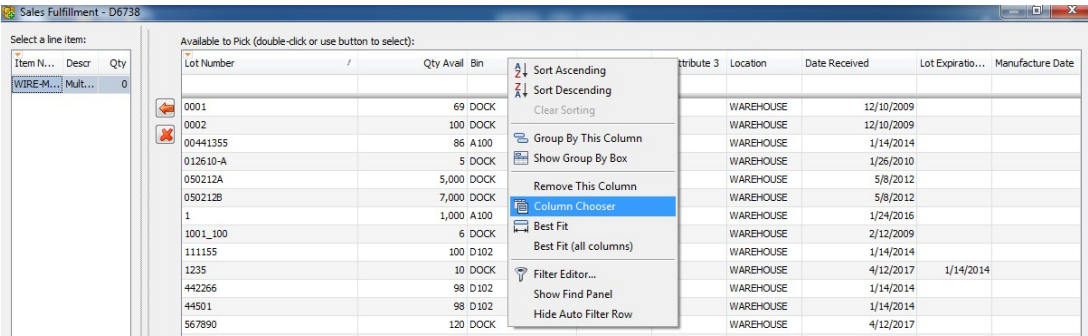
27,403

✓ Show all lines (even ones t

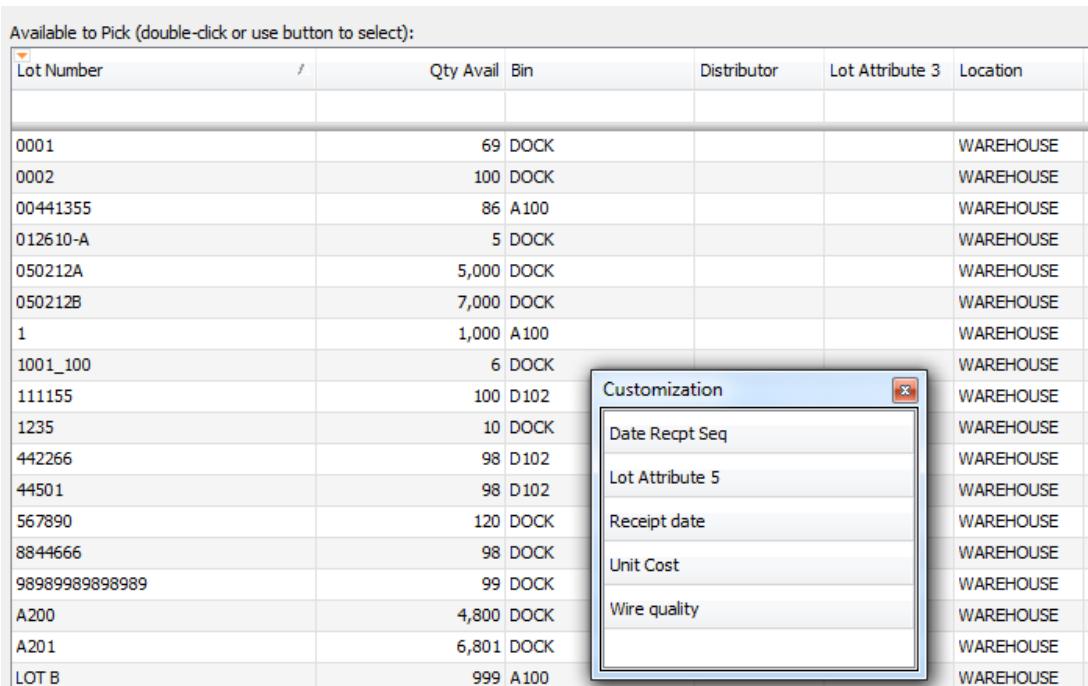
All changes are immediately saved. You CANNOT cancel your changes.

OK


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



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.



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

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