Sales Fulfillment

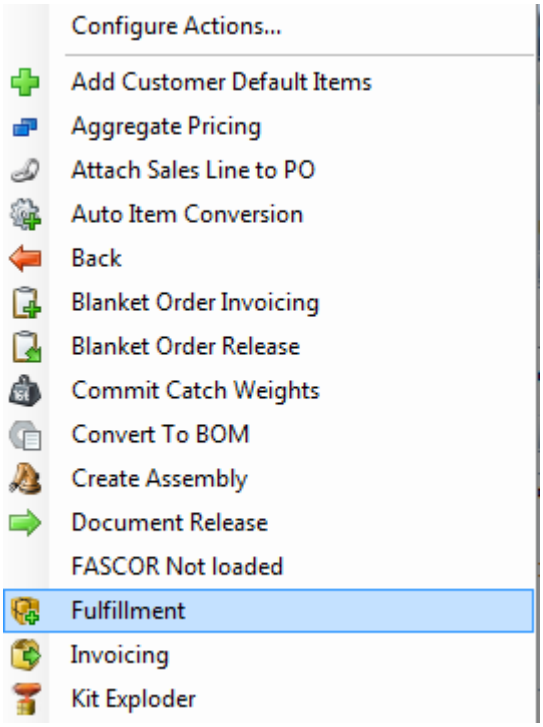
Cavallo Support - 2024-11-22 - Sales

Overview

The Sales Fulfillment screen in SalesPad allows serial/lot tracked or multibin items to be fulfilled. Users manually select items from serial/lot numbers and bins to fulfill orders. If the item is not serial or lot controlled, then Multiple Bins must be enabled in Dynamics GP.

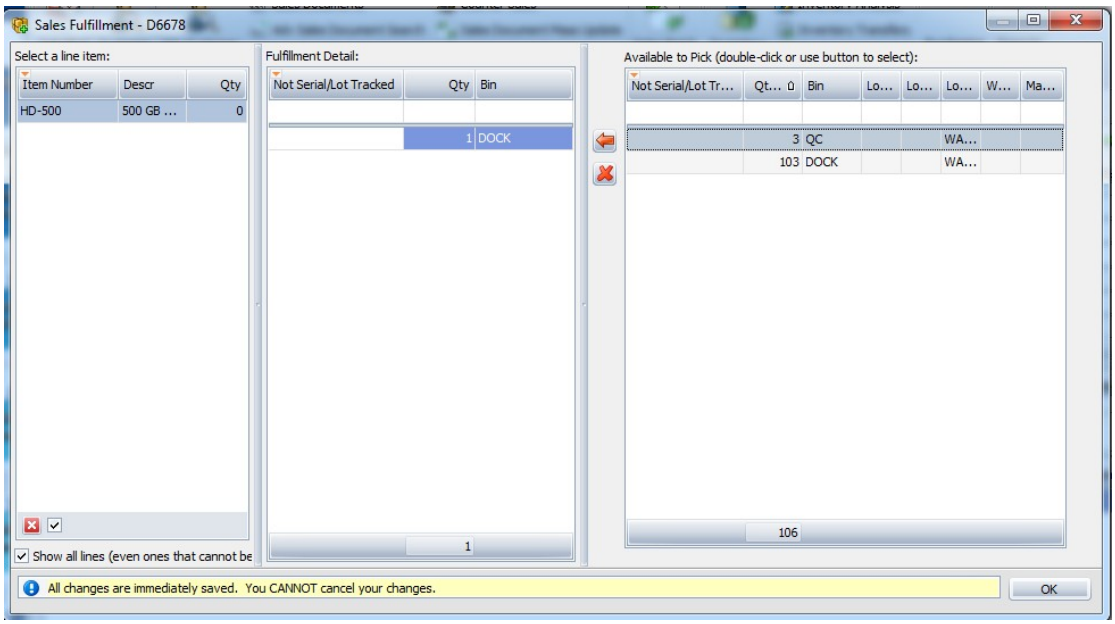
Usage

On an open sales document, open the **Actions** dropdown () from the sales document header. Select Fulfillment.



The Sales Fulfillment screen appears. You will see different grids for selecting a line item, fulfillment detail, and available to pick.

Note: If the **Show all lines** (even ones that cannot be fulfilled) box is checked, all line items on the document will display in the left column. If the box is unchecked, only serial/lot tracked or multibin items will be displayed.



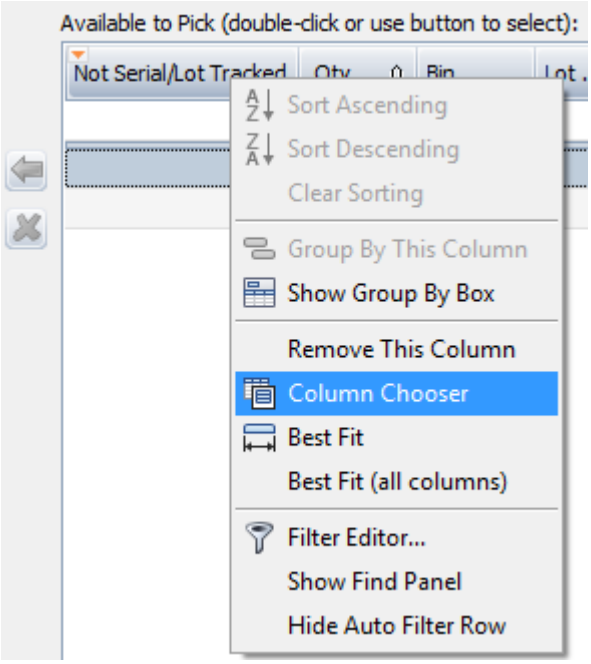
To fulfill items, select the line item to be fulfilled. The Fulfillment Detail grid will automatically display selected serial/lot numbers for the quantity (ex: one serial number will be listed for a quantity on the document of one, and five serial numbers will be listed for a quantity of five). The serial number(s) listed in the Fulfillment Detail column will be used to fulfill the order.

Remaining serial numbers for the selected item will appear in the Available to Pick grid.

Note: The Sales Fulfillment plugin can be selected when creating a new workflow. Using the Forward action triggers the fulfillment window on a sales transaction. For more information on setting up workflows, please reference our documentation.

Column Chooser

SalesPad allows Lot Attribute columns to be added to the Available to Pick grid. To drag-and-drop additional columns onto the header, right-click on an existing column header and select Column Chooser.

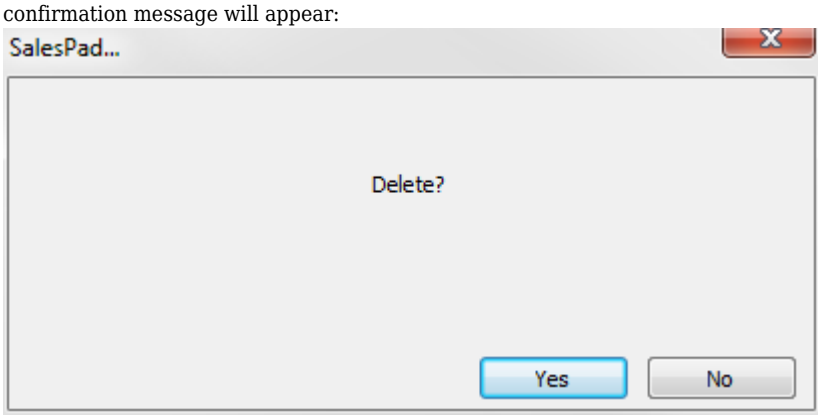


This brings up a Customization box, where you can add additional Lot Attribute columns including Assigned Address Code and Customer, Date Received, Lot Expiration Date, Manufacture Date, Service Notes, Unit Cost, as well as several other columns. You can choose a total of 5 Lot Attributes to be displayed.

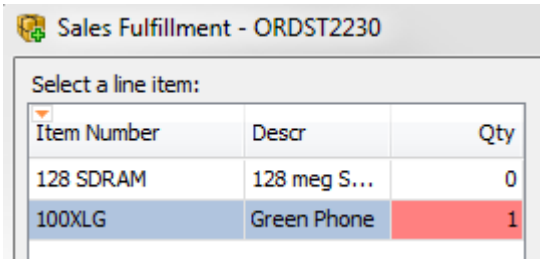


Note: Users can choose to fulfill lots by the Date Received and Sequence (Seq column)

To change which serial numbers are used for fulfillment:

1. Highlight a serial number in the Fulfillment Detail column and click the  to remove it. A confirmation message will appear:


2. Click **Yes** to confirm. The selected serial number will return to the Available to Pick column and the Qty for the line item will be highlighted in red to indicate that it will not be fully fulfilled:



3. Select a serial number from the Available to Pick column and either double-click it or click the  to add it to the Fulfillment Detail column.

You can fulfill a line item up to its allocated quantity; if the allocated quantity is zero, you cannot fulfill the line. When items are ready to be fulfilled, click **OK**. The Quantity Fulfilled column will be updated on the sales document.

Note: Grid layout changes (See: SalesPad Grids) on the Sales Fulfillment Screen will save based on the item tracking (Lot Numbers, Serial Numbers, Multi-Bin), so each tracking type can have a different layout. However, if Lot Numbers are not in use, the Lot Expiration Date, Manufacture Date, and Lot Attribute columns will not save on reload.

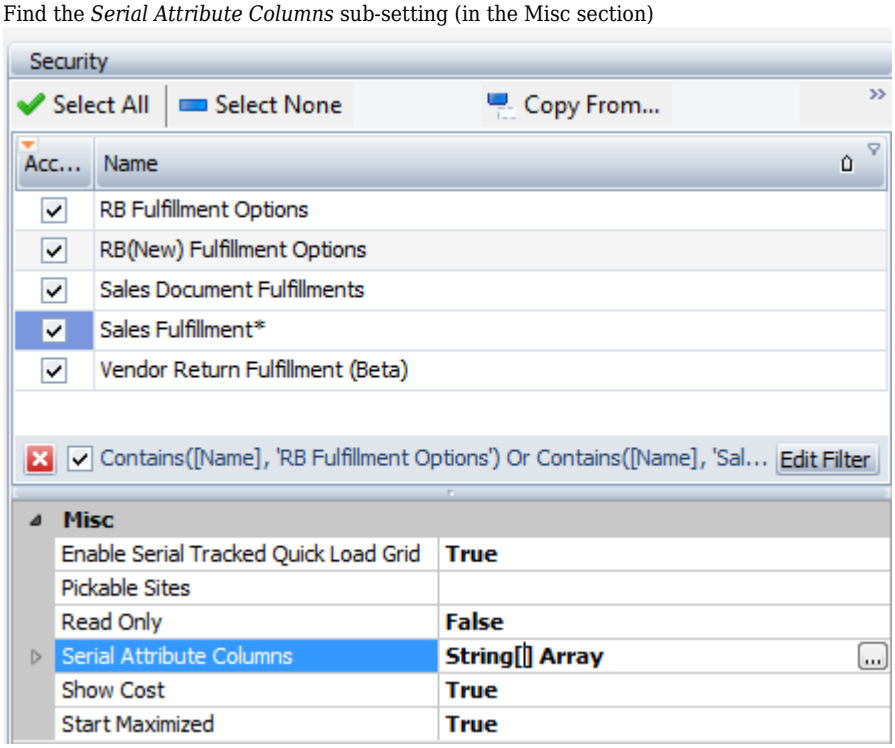
Adding Serial Attributes to the Sales Fulfillment Screen

You can control which serial attribute columns are available on the Sales Fulfillment screen, by specifying the column names within the SalesPad Security Editor.

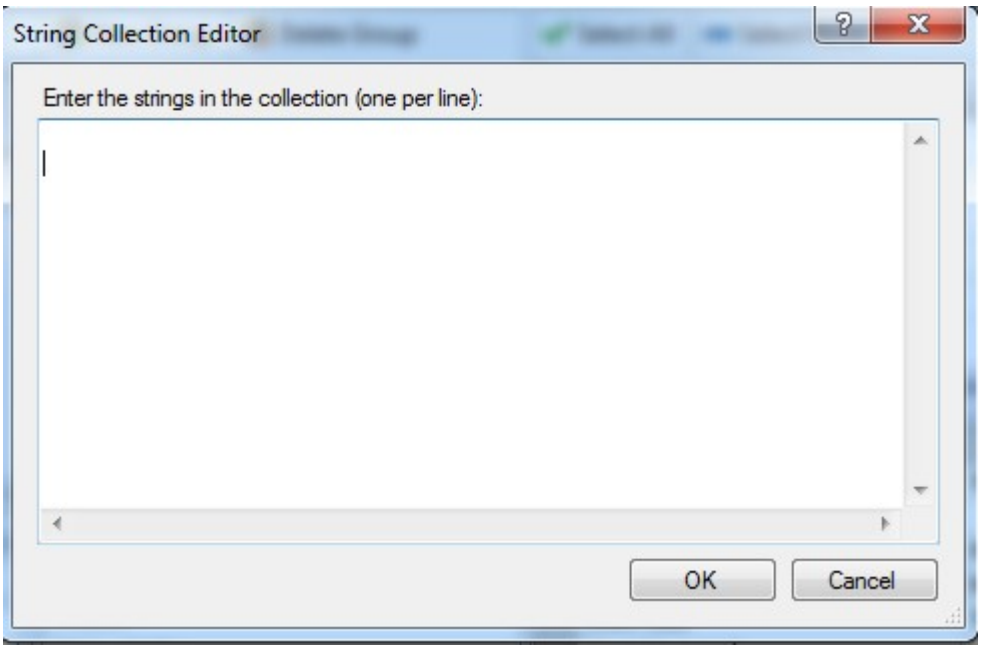
Procedure

In Modules > Security Editor, add column names from the spSerialAttribute table:

1. In the Security column, click *Sales Fulfillment* (type *fulfillment on the filter line to find it faster) and make sure the box is checked
2. Find the *Serial Attribute Columns* sub-setting (in the Misc section)



3. Click the ellipsis (**...**) button to the right of the words String[]Array. The String Collection Editor screen appears:



4. Enter column names, entering one per line
5. When finished, click **OK**. You can click on the arrow in front of the Serial Attribute Columns label to view the attributes you have added:

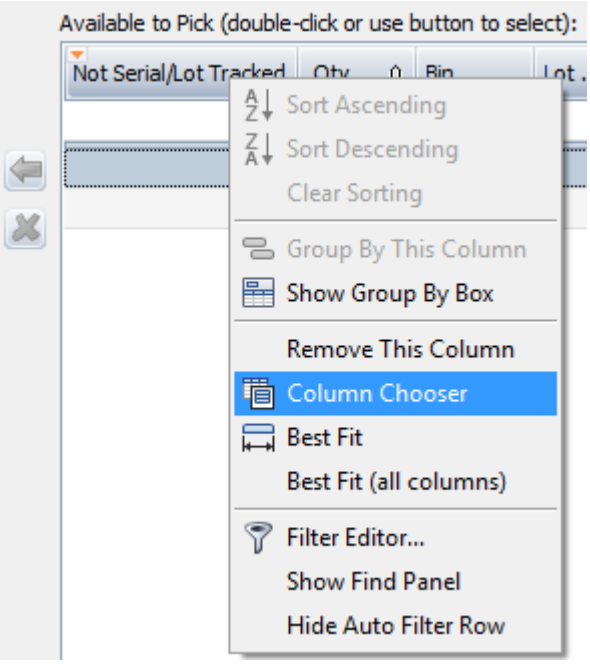
Misc	
Enable Serial Tracked Quick Load Grid	**True**
Pickable Sites	
Read Only	**False**
Serial Attribute Columns	**String[] Array**
[0]	Test One
[1]	Test Two
[2]	Test Three
Show Cost	**True**
Start Maximized	**True**

6. Click **Save**
7. Log out and back in to SalesPad

Testing the Changes

Next, test the changes. Your changes will be visible for serialized items. The 100XLG is a good test-data example of a serialized item.

1. Open a sales order
2. Add a 100XLG to the order and click **Save**
3. On the header, go to the Fulfillment plugin (Actions > Fulfillment)
4. On the Sales Fulfillment screen, select the 100XLG in the left-hand column
5. Right-click on a column in the far-right grid, “Available to Pick”, and select Column Chooser:

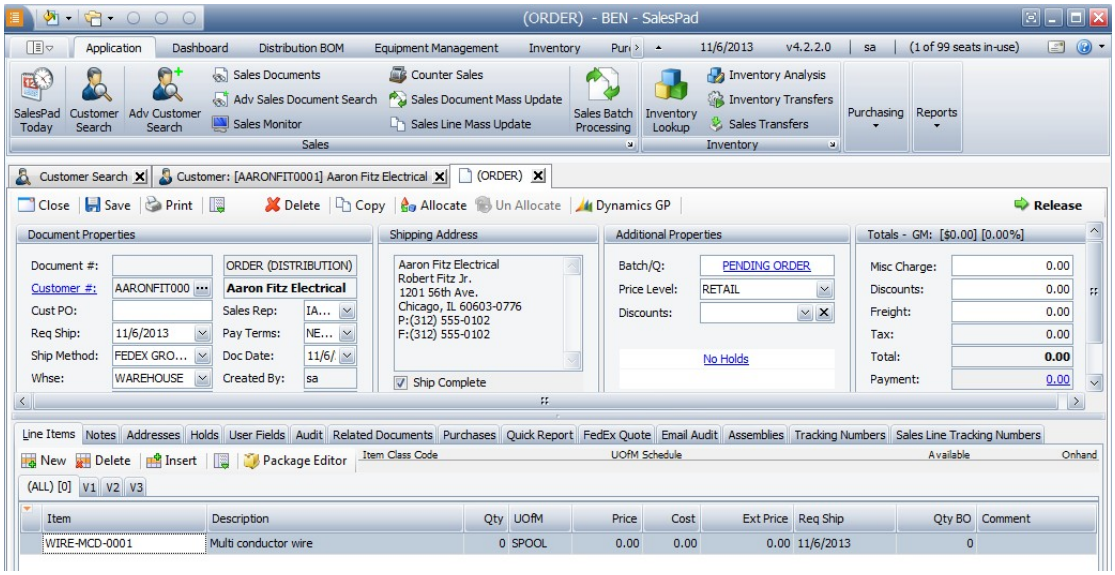


6. Drag the new column into the grid and check for values.

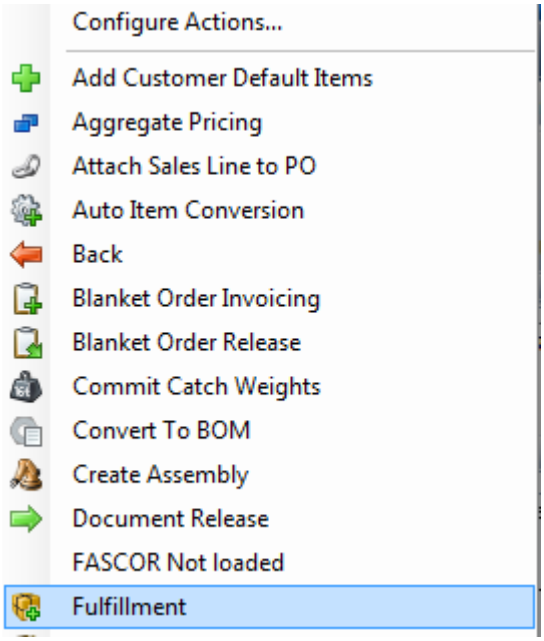
Adding Serial and Lot Item User Defined Fields to the Available to Pick Grid

A Fulfillment plugin allows you to add user defined fields from Serial and Lot items so they populate in the Available to Pick Grid. The Column Chooser allows you to add the Lot and Serial Number user defined fields.

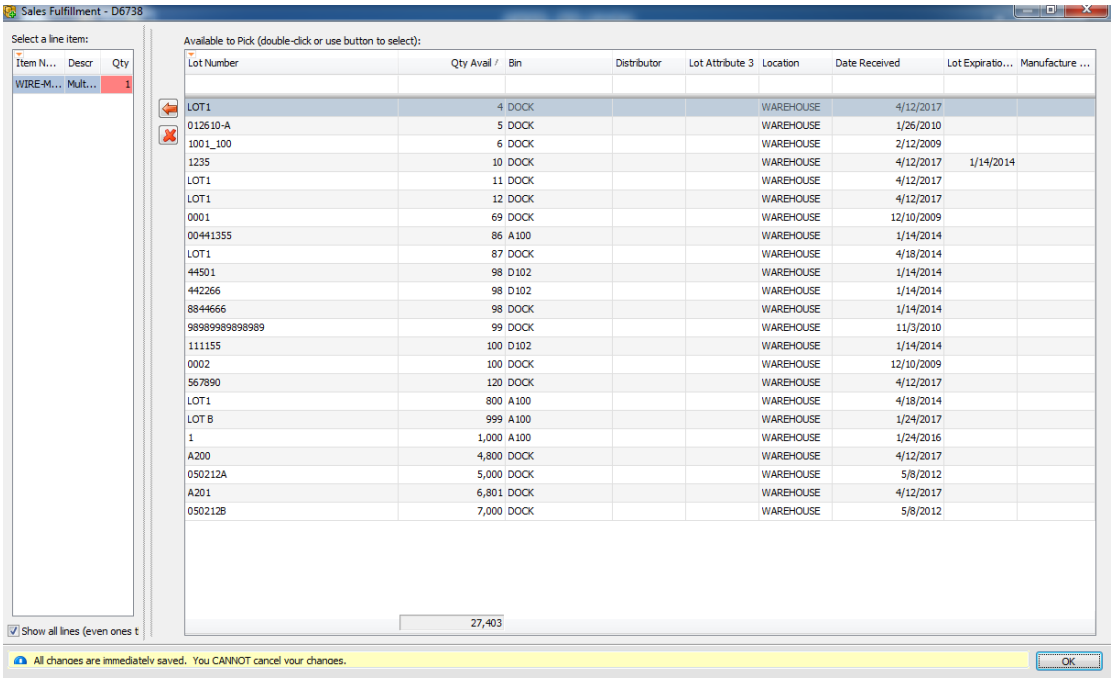
Open the Customer Card you want to use and click on **Distribution Order** to create a new order. Choose or search for the item or items you want to add to the order. In the example below, the item WIRE-MCD-0001, a lot-controlled item, is chosen.



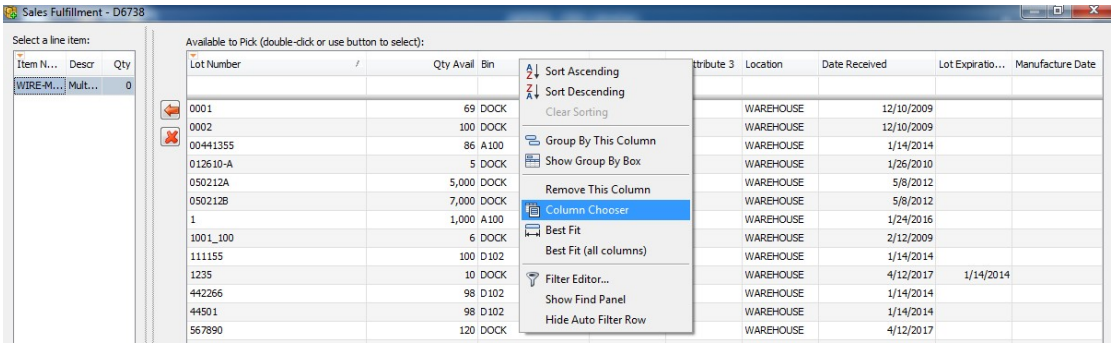
Open the **Actions** dropdown ( ) from the document header and select Fulfillment:



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



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 and Unit Cost) to add to the Available to Pick grid.

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

Lot Number	Qty Avail	Bin	Distributor	Lot Attribute 3	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			WAREHOUSE
1235	10	DOCK			WAREHOUSE
442266	98	D102			WAREHOUSE
44501	98	D102			WAREHOUSE
567890	120	DOCK			WAREHOUSE
8844666	98	DOCK			WAREHOUSE
98989989898989	99	DOCK			WAREHOUSE
A200	4,800	DOCK			WAREHOUSE
A201	6,801	DOCK			WAREHOUSE
LOT B	999	A100			WAREHOUSE

Customization

- Date Recpt Seq
- Lot Attribute 5
- Receipt date
- Unit Cost
- Wire quality

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

Security

*Sales Fulfillment** - Allows a security group to access the Fulfillment action on a sales document.