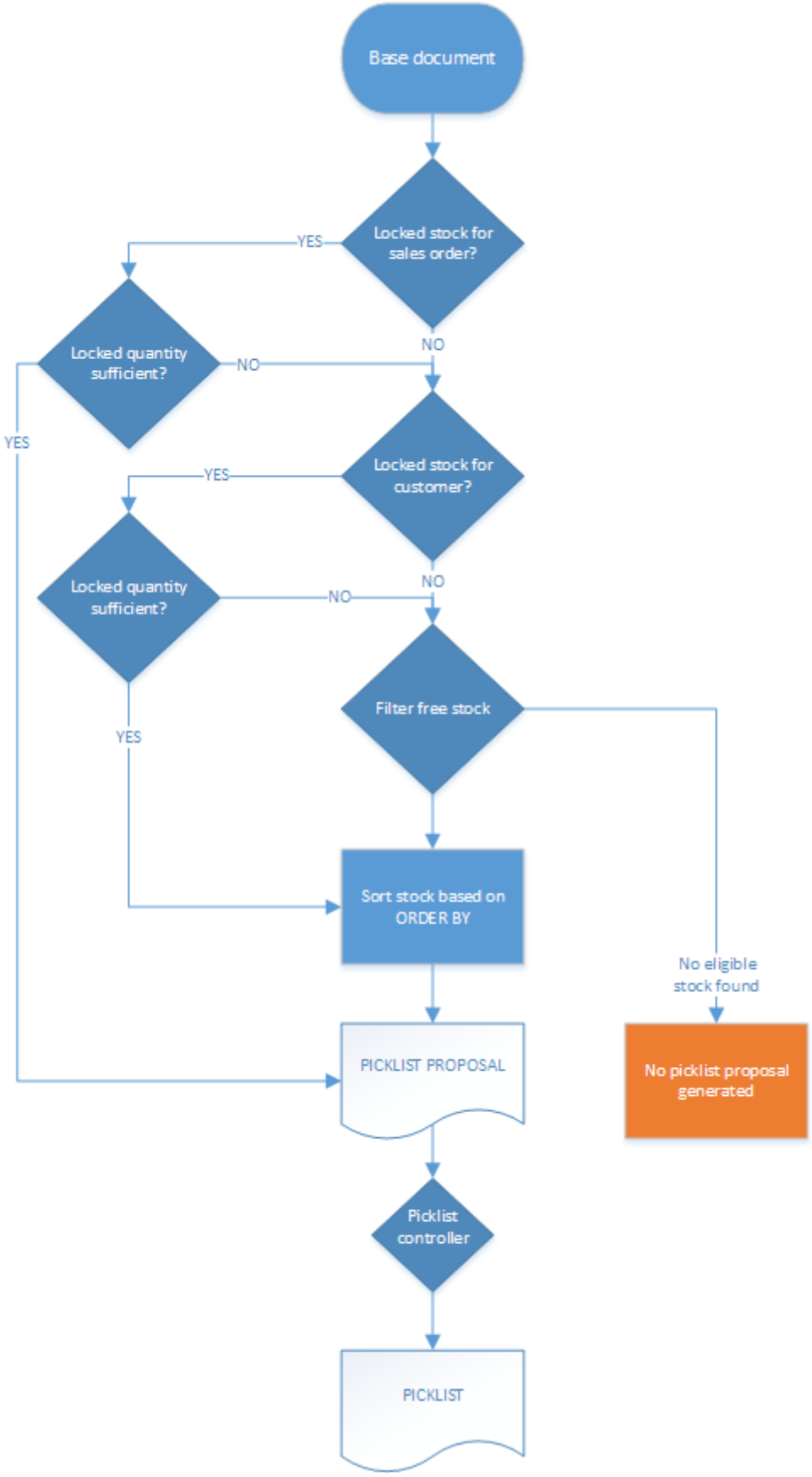
17.2. Pick list proposal

Pick list proposals can be created for the following documents:

- Sales order
- Production order (only if the ‘Create proposal for picking’ option is set to true on the Picking for production controller)
- Inventory transfer request



When creating a pick list proposal, the system performs the following logic to allocate stock:

1. Get locked stock linked to the base document

If there is locked stock linked to the base document, the system will propose that stock.

2. Get locked stock linked to the customer
If there are no locked stock linked to the base document or the quantity of the locked stock is not sufficient, then the system will check if there are locked stock linked to the customer.
When there is stock locked for the customer, the system will propose that stock. If the quantity of the locked stock exceeds the ordered quantity, the system will sort the locked stock based on the option selected as 'Stock order by' and will allocate the stock from the first line.

3. Get the list of free stock
If there is no locked stock linked to the customer or the quantity of the locked stock is not sufficient, then the system will filter the free stock to create the list of the stock that are allowed to be picked.

A stock will be listed if the following verifies:

- The stock is located in the selected warehouse
- The stock is not locked for other customer or base document
- Quality status can be picked and shipped
- Not expired stock
- Stock within external shelf life
- If there are batch attributes selected on the sales order, then only batches with matching batch attributes will be listed

Stock located on:

- Disallowed locations
- Locations where the 'Block stock from being used for the picking process' option is enabled will not be taken into account.

After the list of the stock that is available for picking has been created, the system sorts it based on the *'Stock order by'* setting on the Pick list proposal generator. No pick list proposal will be created if there is no available stock.
When the pick list proposal is generated, the proposed stock will be locked except if the *'Do not lock stock on picking (pick lists can be created even if no stock is available)'* option is set to true on the on General settings. The level of the locking depends on the selected 'Stock order by' setting.
When the proposal line is using stock that was locked for a sales order or customer, this locking is removed and replaced by a locking linked to the proposal line. The level of the locking will be kept regardless of the *'Stock order by'* setting.

If the *'Show pick list proposal info screen on incomplete proposal?'* option is enabled on the Pick List Proposal generator, an additional screen will open when creating pick list proposal but the total ordered quantity could not be allocated for the pick list proposal.

Multiple pick list proposals

Multiple pick list proposals will be created for a single document in the following scenarios:

- The sales order/sales invoice lines have different Shipping type. The following shipping type settings are taken into account for splitting document lines into several proposals:
  - Automatic shipping?
  - Automatic invoicing?

    - Is customer coming to collect?
- The document lines have different warehouses assigned.
- The document lines have different Ship-to Names assigned.
- For the Produmex pick list type of the sales order/sales invoice the 'Split PL on item pick type?' and/or the 'Split PL on item pick type 2?' option is set to 'Yes' and there are items on the sales order that has different 'Pick type'/'Pick type 2' set on the Produmex Sales tab of the Item Master Data.
- The number of the pallets linked to the pick list proposal is higher than the 'Number of pallets' defined for the Produmex pick list type of the sales order/sales invoice. The number of pallets linked to the pick list proposal is calculated based on the 'Default quantity on logistical unit' value that was specified on the Produmex Inventory tab of the Item Master Data of the item and the ordered quantity. If there is not enough stock to fulfill the proposal, the number of pallets will be calculated based on the free quantity that can be allocated for the proposal.

EXAMPLE:
The default quantity on a logistic unit is 10 pcs for Item A and 20pcs for Item B. The number of the pallets for the pick list type is 5.

Sales order 1:
Item A: 30pcs = 3 x 10pcs = 3 pallets
Item B: 20pcs = 1 x 20pcs = 1 pallet
3 + 1 = 4 < 5 → 1 pick list proposal
Because the total number of pallets needed to fulfill the order is less than the number of pallets allowed on a pick list proposal, only one pick list proposal is created.

Sales order 2:
Item A: 60 pcs = 6 x 10pcs = 6 pallets
Item B: 105 pcs = 5.25 x 20pcs = 5.25 pallets
6 + 5.25 = 11.25 > 5 → 3 pick list proposals
Because the total number of pallets needed to fulfill the order is greater than the number of pallets allowed on the pick list proposal, the pick list proposal is split.
1. The first proposal is created for 5 pallets of Item A, which is 50pcs.
2. The second proposal is created for the remaining 1 pallet of Item A and 4 pallets of Item B, which is 10pcs of Item A and 80pcs of Item B.
3. The third proposal is created for the remaining 2 pallets of Item B, which is 25pcs.

Sales order 3:
Item A: 5 pcs
Item B: 84 pcs
Item A: 3 pcs
The system groups the lines of Item A:
Item A: 5pcs + 3pcs = 8pcs = 0.8 pallet
Item B: 84 pcs = 4.2x 20pcs = 4.2 pallets
4.2+0.8 = 5 → 1 pick list proposal
Because the total number of pallets needed to fulfill the order equals to the number of pallets allowed on a pick list proposal, the pick list proposal is not split and only one pick list proposal is created.