Group Additional Picklist Proposals

Overview

When multiple sales orders exist for the same customer and delivery address, their lines can be grouped into a single picklist proposal, as long as no picklist has been created.

In real life scenarios, it can happen that there is an existing proposal for the sales order(s) but there is extra stock that can be allocated for the sales order, for example additional stock was received, the quantity on the sales order line was increased or a new line was added. If the **Try to group items on 1 proposal? (Y/N)** setting is enabled, the system attempts to group sales order lines into a single picklist proposal by closing the existing proposal and adding all lines of the sales order(s) into a single picklist proposal. Only proposals that do not yet have a picklist can be closed.

This setting applies to creating picklist proposals on:

- Sales Order screen
- Open Sales Orders screen
- Picklist Proposal Manager screen
- Picklist Robot

Important Note

Grouping works differently depending on how picklist proposals are generated:

Option A - **When on the Sales Order screen or using Open Sales Orders screen:**
These functions work on document level. The system always uses all document lines, including sales order lines which were present in the already created picklist proposal. This means that the initial proposal is closed and a new proposal is generated.

Option B - **When using the Picklist Robot Tool or the Picklist Proposal Manager screen:**
These functions work on line level. The system uses the views below to retrieve document lines. If the open quantity of the document line is fully allocated on a proposal, the line is not listed. If the picklist proposal contains a fully allocated line, it remains open, and a new picklist proposal is created only for the extra stock.

- **Picklist Proposal Manager screen:**
  - PMX_PICKLIST_PROPOSAL_MANAGER_SALES
  - PMX_PICKLIST_PROPOSAL_MANAGER_PRODUCTION
  - PMX_PICKLIST_PROPOSAL_MANAGER_TRANSFER
- **Picklist Robot with related view:**
  - PMX_PICK_LIST_ROBOT_CREATE_PROPOSALS

Configuration

1. Open the Organizational Structure.
2. Go to Extension Parameters > Picklist Proposal Generator.
3. Enable the **Try to group items on 1 proposal? (Y/N)** setting.



Example - Adding new line to sales order

In this example we have an initial sales order 101 and a generated picklist proposal 1001.

	sales order 101	**available quantity in stock**	**initial picklist proposal 1001**
Item A	10	10	10
Item B	10	10	10
Item C	10	10	10

Let's add a new line to sales order with Item D.

	sales order 101	**available quantity in stock**	**initial picklist proposal 1001**	**quantity not allocated**
Item A	10	10	10	0
Item B	10	10	10	0
Item C	10	10	10	0
Item D	30	30	0	30

Option A)
When generating picklist proposals from the Sales Order or the Open Sales Orders screens, WMS checks if a new proposal needs to be created on document level. Since the system uses document lines for each item, it closes the initial picklist proposal 1001 and creates the new picklist proposal 1002.

new picklist proposal 1002	**quantity**
Item A	10
Item B	10
Item C	10
Item D	30

Option B)
When generating picklist proposals with the Picklist Robot tool or from the Picklist Proposal Manager, the view only returns the document lines where the open quantity is not fully allocated on a proposal. Since the lines with Item A, B, C are not returned, WMS does not close the initial picklist proposal 1001 and creates a new picklist proposal 1002 for Item D only.

	sales order 101	**available quantity in stock**	**initial picklist proposal 1001**	**new picklist proposal 1002**
Item A	10	10	10	0

	sales order 101	available quantity in stock	initial picklist proposal 1001	new picklist proposal 1002
Item B	10	10	10	0
Item C	10	10	10	0
Item D	30	30	0	**30**

Example - Creating stock for a sales order line

In this example we have an initial sales order 101 and two generated picklist proposals, 1001 and 1002.

	sales order 101	available quantity in stock	initial picklist proposal 1001	initial picklist proposal 1002
Item A	10 (ship type A)	10	10	0
Item B	10 (ship type A)	5	5	0
Item C	10 (ship type B)	5	0	5

Let's receive 5 pcs of ITEM B and 5 pcs of ITEM C into stock.

	available quantity in stock	initial picklist proposal 1001	initial picklist proposal 1002	quantity not allocated
Item A	10	10	0	0
Item B	10	5	0	5
Item C	10	0	5	5

Option A)
When generating picklist proposals from the Sales Order or the Open Sales Orders screens, WMS closes the initial picklist proposals 1001 and 1002 and creates the new picklist proposals 1003 and 1004.

	new picklist proposal 1003	new picklist proposal 1004
Item A	10	0
Item B	10	0
Item C	0	10

Option B)
When generating picklist proposals with the Picklist Robot tool or from the Picklist Proposal Manager, the view returns document lines for ITEM B and ITEM C since for those items the full quantity is not allocated. Since picklist proposal 1001 contains a fully allocated line (ITEM A) it will remain open, but picklist proposal 1002 is closed as it does not contain a line that has fully allocated quantity. For ITEM B, a new picklist proposal 1003 is created only for the extra stock and for ITEM C a new picklist proposal 1004 is created for the full quantity.

	initial picklist proposal 1001	new picklist proposal 1003	new picklist proposal 1004
Item A	10	0	0
Item B	5	**5**	0
Item C	0	0	**10**

Example - Changing quantity on sales order

In this example we have two initial sales orders 101 and 102 and a generated picklist proposal 1001.

	sales order 101	sales order 102	available quantity in stock	initial picklist proposal 1001
Item A	10	0	50	10
Item B	20	0	50	20
Item C	10	0	50	10
Item D	0	30	50	10

Let's increase the quantities for items B, C and D.

	sales order 101	sales order 102	available quantity in stock	initial picklist proposal 1001	quantity not allocated
Item A	10	0	50	10	0
Item B	20+5=25	0	50	20	5
Item C	10+5=15	0	50	10	5
Item D	0	30+5=35	50	30	5

Option A)
Since the need for a new proposal is calculated on document level, WMS closes the initial picklist proposal 1001 and creates the new picklist proposal 1002.

new picklist proposal 1002	quantity
Item A	10
Item B	25
Item C	15
Item D	35

Option B)
Since the view does not return all the document lines, WMS does not close the initial picklist proposal 1001 because Item A is not in the view. It keeps the initial picklist proposal 1001 open and creates a new picklist proposal 1002 for the extra quantity.

	sales order 101	sales order 102	available quantity in stock	initial picklist proposal 1001	new picklist proposal 1002
Item A	10	0	50	10	0
Item B	20+5=25	0	50	20	**5**
Item C	10+5=15	0	50	10	**5**
Item D	0	30+5=35	50	30	**5**

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