Group Picklist Proposals

Overview

If there are multiple sales orders selected for the same customer/address, it is possible to group the lines of the sales orders on the same proposal if no picklist has been created yet.

Each time you create a new proposal, the system closes the existing one(s) and creates one new proposal for all the lines on the sales orders.

The function applies to

- Sales Order screen
- Open Sales Orders screen
- Picklist Proposal Manager screen
- 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. Select extension: Picklist Proposal Generator - Generates Picklist Proposals Grouped by Customer-Address

4. Enable the *Try to group items on 1 proposal? (Y/N)* setting.

Adding new line to sales order or creating stock for a sales order line

If you add new line to sales order or create stock for a sales order line which didn't have any, the following two options are possible:

- The system (the view) returns all sales order lines which were present in the already created picklist proposal, it closes the initial picklist proposal and creates a new picklist proposal which will contain the new line as well.
  (This is the default behavior when creating proposal(s) from the Sales Order form.)
- The system (the view) does NOT return all sales order lines which were present in the already created picklist proposal, it keeps the initial picklist proposal and creates a new picklist proposal for the new line.
  (This is the default behavior when creating proposal(s) with the Picklist Robot.)

Example

We have an initial sales order 101 and a generated picklist proposal 1001.

sales order 101		initial picklist proposal 1001	
Item A	10	Item A	10
Item B	20	Item B	20
Item C	10	Item C	10

We add a new line to sales order with item D.

sales order 101	
Item A	10
Item B	20
Item C	10
Item D	**30**

Option a) The system (the view) returns all items, it closes the initial picklist proposal 1001 and creates the new picklist proposal 1002.

new picklist proposal **1002**	
Item A	10
Item B	20
Item C	10
Item D	**30**

Option b) The system (the view) does NOT return all the original items, it does not close the initial picklist proposal 1001 and creates a new picklist proposal 1002 for the new line.

initial picklist proposal 1001		new picklist proposal **1002**	
Item A	10	-	-
Item B	20	-	-
Item C	10	-	-
-	-	**Item D**	**30**

Changing quantity on sales order

If you change the quantity on (a) sales order(s), the following two options are possible:

- The system (the view) returns all sales order lines which were present in the already created picklist proposal, it closes the initial picklist proposal and creates a new picklist proposal. (This is the default behavior when creating proposal(s) from the Sales Order form.)
- The system (the view) does NOT return all sales order lines which were present in the already created picklist proposal, it keeps the initial picklist proposal and creates a new picklist proposal for the extra quantity.

(This is the default behavior when creating proposal(s) with the Picklist Robot.)

Example 1

We have an initial sales order and an initial picklist proposal with the same items and quantities:

sales order 101		initial picklist proposal 1001	
Item A	10	Item A	10
Item B	20	Item B	20
Item C	10	Item C	10

We decide to increase the quantities for items B and C.

sales order 101	
Item A	10
Item B	20 + 5 = **25**
Item C	10 + 5 = **15**

Option a) The system returns all items, it closes the initial picklist proposal 1001 and creates the new picklist proposal 1002.

sales order		new picklist proposal **1002**	
Item A	10	Item A	10
Item B	25	Item B	**25**
Item C	15	Item C	**15**

Option b) The system does not return all the original items, it does not close the initial picklist proposal 1001 because item A is not in the view. It keeps the initial picklist proposal 1001 and creates a new picklist proposal 1002 for the extra quantity.

sales order		initial picklist proposal 1001		new picklist proposal **1002**	
Item A	10	Item A	10	-	-
Item B	25	Item B	20	Item B	**5**
Item C	15	Item C	10	Item C	**5**

Example 2

We have two initial sales orders 101 and 102 and a generated picklist proposal 1001.

sales order 101		sales order 102		initial picklist proposal 1001	
Item A	10	-	-	Item A	10
Item B	20	-	-	Item B	20
Item C	10	-	-	Item C	10
-	-	Item D	30	Item D	30

We decide to increase the quantities for items B, C and D.

sales order 101	
Item A	10
Item B	20 + 5 = **25**
Item C	10 + 5 = **15**
sales order 102	
Item D	30 + 5 = **35**

Option a) The system returns all items, it closes the initial picklist proposal 1001 and creates the new picklist proposal 1002.

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

Option b) The system does not return all the original items, it does not close the initial picklist proposal 1001 because item D is not in the view. It keeps the initial picklist proposal 1001 and creates a new picklist proposal 1002 for the extra quantity.

initial picklist proposal 1001		new picklist proposal **1002**	
Item A	10	-	-
Item B	20	Item B	**5**
Item C	10	Item C	**5**
Item D	30	-	-