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# **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 100	
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.

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(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 = <b>25</b>			
Item C	10 + 5 = <b>15</b>			

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 or	rder initial picklist proposal 1001		new picklist prop	osal <b>1002</b>	
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 o	sales order 101				
Item A	10				
Item B	20 + 5 = <b>25</b>				
Item C	10 + 5 = <b>15</b>				
sales o	rder 102				
Item D	30 + 5 = <b>35</b>				

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 pro	posal <b>1002</b>
Item A	10	-	-
Item B	20	Item B	5
Item C	10	Item C	5
Item D	30	-	-

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