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.

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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 100	
Item A	10	ltem A	10
ltem B	20	ltem B	20
ltem C	10	ltem C	10

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

sales order 101		
ltem A	10	
ltem B	20	
ltem 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		
ltem 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	
ltem A	10	-	-
Item B	20	-	-
ltem C	10	-	-
-	-	ltem 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 100	
Item A 10		ltem A	10
Item B	20	ltem B	20
Item C	10	ltem C	10

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

sales order 101				
ltem A 10				
Item B	20 + 5 = 25			
ltem 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	ltem A	10	
ltem B	25	ltem B	25	
ltem C	15	ltem 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 pr	oposal 1001	new picklist pro	oosal 1002
Item A	10	ltem A	10	-	-
ltem B	25	ltem B	20	ltem B	5
ltem C	15	ltem C	10	ltem 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	-	-	ltem A	10
ltem B	20	-	-	Item B	20
ltem C	10	-	-	ltem C	10
-	-	ltem D	30	ltem D	30

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

sales order 101					
Item A 10					
	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			
ltem A	10		
Item B	25		
ltem C	15		
ltem 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	
ltem A	10	-	-
ltem B	20	ltem B	5
ltem C	10	ltem C	5
ltem D	30	-	-

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