

6.2.6. Stock allocation

The stock allocation screen is used to allocate stock of 1 item to several sales order (Shipping Type must be configured) lines or customers.

There are 2 required filter fields that need to be entered:

- Item
- Warehouse

The other filter fields are optional:

- Customer From/To
- Customer group

The grouping option has 2 options:

- Sales document
- Customer

Based on what grouping option has been chosen, the allocation that will be created will be against the sales order or the customer.

Pressing the **Apply filter** button, the grid will be filled with the data.



On the top right there are some summary fields available:

- **Inventory quantity:** The total inventory quantity
- **Free quantity:** The current free quantity. This summary takes in account the free quantity in the database, and the unsaved changes in the grid.
- **Total allocated quantity:** The total quantity that is allocated in the grid. Quantities that are for instance allocated to a pick list, production order, ... are not taken in account for this.

Update

When pressing this button the changes made on the screen are updated to the database.

There are checks that are performed to validate what has been entered. If there is some data that does not pass this validation, the cell 'Error message' will have the explanation about the problem.

Cancel

When pressing this button the changes made on the screen are cancelled and the screen closes.

Clear allocation

This enters a zero in the 'To allocate' column.

Generate pick list proposal

Generates proposals for all selected lines.

This option is only available for grouping option 'Sales document'

Suggest allocation

Suggest an allocation. When no lines are selected, the suggestion will be for all lines in the grid. In

case some lines are selected, the suggestion will be for those selected lines. The suggestion works as follows:

- The free quantity is divided over the selected lines **equally**.
- If the quantity to allocate would be more than what is still 'Open # not allocated', the 'To allocate' quantity will be the remaining 'Open # not allocated'
 - The quantity that is not used to allocate for such a line is NOT transferred to other lines.

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