

Sales Order Allocation

Last Modified on 11/04/2021 9:41 am EDT

Overview

Sales Order Allocation is used when you get orders in advance and need to reserve the stock without a Ship Doc. This gives you complete control of reserving stock and allows you to also complete partial allocations & partial shipments.

Setting up who can Allocate Sales Orders

The first step to using Sales Order Allocation is setting which Roles can access the feature.

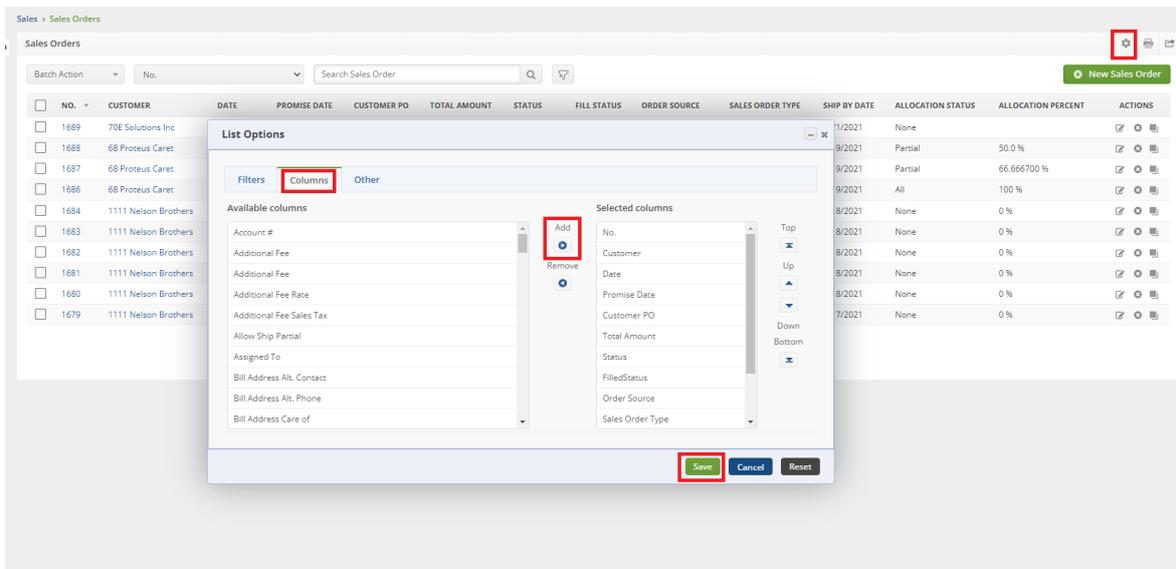
Head to Settings >> Roles >> Edit the Roles you want to access this feature:

The screenshot shows the 'Role-Sales Rep Role' configuration page. The 'Name' field is 'Sales Rep Role' and the 'Description' is 'A custom Role cloned from GM'. The 'Active' checkbox is checked. The 'Can allocate inventory to Sales Orders' checkbox is checked and highlighted with a red box. Other checkboxes include 'Role can manage profile lists', 'Role can edit activity history', 'Can manage accounting', 'Role can edit default doc number', 'Can manage EDI/Ecommerce integrations', and 'PO Limit'. There are 'Save' and 'Reset' buttons in the top right.

TYPE	VIEW	CREATE	EDIT	PRINT/EXPORT	DELETE	ACTIONS
Import	<input checked="" type="checkbox"/>					
Attachment	<input checked="" type="checkbox"/>	Add Exception				
Inventory	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Add Exception
InventoryStatusByLocation	<input checked="" type="checkbox"/>	Add Exception				
InventoryStatusByLocation	<input checked="" type="checkbox"/>	Add Exception				
Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Add Exception

Click the check box to activate the feature for this Role and click Save.

Adding 2 New Columns to the Sales Order List



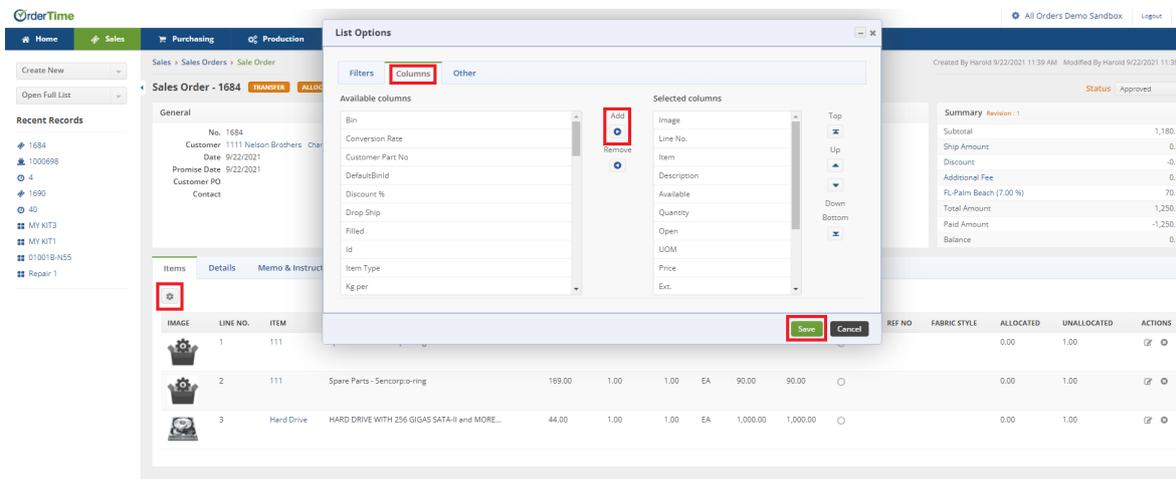
Next click on the View Full List Dropdown, open up the Sales Order List. Click on the cog in the top right and go to the Columns Tab.

Add these two columns: **Allocation Status & Allocation Percent**

Allocation Status - Shows None, Partial, All

Allocation Percent - The actual percentage of items on the Sales Order that have been Allocated

Adding 2 New Columns to the Sales Order itself



Click on an individual Sales Order, then click on the cog right above the line items. Go to the Columns tab.

Add these two columns: **Allocated & Unallocated**

Allocated - The amount of that line Item that has been allocated to reserve the stock.

Unallocated - The amount of that line Item that is not Allocated.

Allocating from a Sales Order

Sales > Sales Orders > Sale Order

Created By Harold 9/22/2021 11:39 AM Modified By Harold 9/22/2021 11:39 AM

Sales Order - 1684 **TRANSFER** **ALLOCATE** Create PDF Export Print Label Status Approved

General

No. 1684
Customer: 1111 Nelson Brothers Change
Date: 9/22/2021
Promise Date: 9/22/2021
Customer PO
Contact

Bill Address

1111 NELSON BROTHERS
2580 WYATT STREET FLOOR/SUITE
BILL CARE OF
WEST PALM BEACH, FL 33404

Total Margin 526.60
Total Margin 44.6300 %
Percentage

Ship Address

1111 NELSON BROTHERS
SHIP 2580 WYATT STREET SHIP FLOOR/SUITE
SHIP CARE OF
WEST PALM BEACH, FL 33404
USA

Summary Revision: 1

Subtotal	1,180.00
Ship Amount	0.00
Discount	-0.00
Additional Fee	0.00
FL-Palm Beach (7.00 %)	70.00
Total Amount	1,250.00
Paid Amount	-1,250.00
Balance	0.00

Items Details Memo & Instructions Custom Payments Ship Docs Dependency Attachments Open Activities Activity History

IMAGE	LINE NO.	ITEM	DESCRIPTION	AVAILABLE	QUANTITY	OPEN	UOM	PRICE	EXT.	CLEARED	REF NO	FABRIC STYLE	ALLOCATED	UNALLOCATED	ACTIONS
	1	111	Spare Parts - Sencorp-o-ring	169.00	1.00	1.00	EA	90.00	90.00	<input type="radio"/>			0.00	1.00	
	2	111	Spare Parts - Sencorp-o-ring	169.00	1.00	1.00	EA	90.00	90.00	<input type="radio"/>			0.00	1.00	
	3	Hard Drive	HARD DRIVE WITH 256 GIGAS SATA-II and MORE...	44.00	1.00	1.00	EA	1,000.00	1,000.00	<input type="radio"/>			0.00	1.00	

To Allocate the entire Sales Order, click on the orange Allocate button in the top-left.

Sales > Sales Orders > Sale Order

Created By Harold 9/22/2021 11:39 AM Modified By Harold 9/22/2021 11:39 AM

Sales Order - 1684 **ALLOCATE** **DEALLOCATE** Create PDF Export Print Label Status Approved

General

No. 1684
Customer: 1111 Nelson Brothers Change
Date: 9/22/2021
Promise Date: 9/22/2021
Customer PO
Contact

Bill Address

1111 NELSON BROTHERS
2580 WYATT STREET FLOOR/SUITE
BILL CARE OF
WEST PALM BEACH, FL 33404

Total Margin 526.60
Total Margin 44.6300 %
Percentage

Ship Address

1111 NELSON BROTHERS
SHIP 2580 WYATT STREET SHIP FLOOR/SUITE
SHIP CARE OF
WEST PALM BEACH, FL 33404
USA

Summary Revision: 1

Subtotal	1,180.00
Ship Amount	0.00
Discount	-0.00
Additional Fee	0.00
FL-Palm Beach (7.00 %)	70.00
Total Amount	1,250.00
Paid Amount	-1,250.00
Balance	0.00

Items Details Memo & Instructions Custom Payments Ship Docs Dependency Attachments Open Activities Activity History

IMAGE	LINE NO.	ITEM	DESCRIPTION	AVAILABLE	QUANTITY	OPEN	UOM	PRICE	EXT.	CLEARED	REF NO	FABRIC STYLE	ALLOCATED	UNALLOCATED	ACTIONS
	1	111	Spare Parts - Sencorp-o-ring	167.00	1.00	1.00	EA	90.00	90.00	<input type="radio"/>			1.00	0.00	
	2	111	Spare Parts - Sencorp-o-ring	167.00	1.00	1.00	EA	90.00	90.00	<input type="radio"/>			1.00	0.00	
	3	Hard Drive	HARD DRIVE WITH 256 GIGAS SATA-II and MORE...	43.00	1.00	1.00	EA	1,000.00	1,000.00	<input type="radio"/>			1.00	0.00	

This will set every line item to Allocated which you can see in that column. It also spawns the Deallocate button which can reverse what you've just done and release the stock back to Unallocated.

Sales > Sales Orders

Sales Orders

3 items checked

Batch Action: Allocate

	DATE	PROMISE DATE	CUSTOMER PO	TOTAL AMOUNT	STATUS	FILL STATUS	ORDER SOURCE	SALES ORDER TYPE	SHIP BY DATE	ALLOCATION STATUS
<input type="checkbox"/>	10/5/2021	10/5/2021	423423424	0.00	Processing	None	Phone/Fax/Email		10/1/2021	None
<input type="checkbox"/>	9/23/2021	9/23/2021		83.70	Approved	None	Phone/Fax/Email		9/19/2021	Partial
<input type="checkbox"/>	9/23/2021	9/23/2021		983.70	Approved	None	Phone/Fax/Email		9/19/2021	Partial
<input type="checkbox"/>	9/23/2021	9/23/2021		83.70	Approved	None	Phone/Fax/Email		9/19/2021	Partial
<input type="checkbox"/>	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	All
<input checked="" type="checkbox"/>	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None
<input checked="" type="checkbox"/>	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None
<input checked="" type="checkbox"/>	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None
<input type="checkbox"/>	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None
<input type="checkbox"/>	9/21/2021	9/21/2021		1,250.00	Approved	None	Phone/Fax/Email		9/17/2021	None

< Prev 1 of 69 Next >
Total Records: 681

Batch Action can also be used to Allocate a bunch of Sales Orders at once from the Sales Orders List.

- Select the Sales Orders you wish to Allocate
- Click on Batch Action
- Click on Allocation
- Click Allocate or Deallocate
- You will see the Allocation Status change to All

- To Allocate inventory you must have a Location set
- Once you Allocate you cannot change the Location
- Allocating reserves the stock and takes it out of Inventory making it Unavailable

Partial Allocation

Sales Order - 1686 **ALLOCATE** **DEALLOCATE** Create PDF Export Print Label Status: Approved

General	Bill Address	Ship Address	Summary
No. 1686 Customer: 68 Proteus Caret Date: 9/23/2021 Promise Date: 9/23/2021 Customer PO Contact	68 PROTEUS CARET 2910 WILDROSE LANE SOUTHFIELD, MI 48075 US Total Margin: 15.75 Total Margin Percentage: 18.8200%	68 PROTEUS CARET 2910 WILDROSE LANE SOUTHFIELD, MI 48075 US	Revision: 1 Subtotal: 83.70 Fedx: 0.00Non Discount: -0.00 Additional Fee: 0.00 FL-Miami-Dade (6.00 %): 0.00 Total Amount: 83.70 Paid Amount: -83.70 Balance: 0.00

IMAGE	LINE NO.	ITEM	DESCRIPTION	AVAILABLE	QUANTITY	OPEN	UOM	PRICE	EXT.	CLEARED	REF NO	FABRIC STYLE	ALLOCATED	UNALLOCATED	ACTIONS
	1	111	Spare Parts - Sencorpio-ring	167.00	1.00	1.00	EA	81.00	81.00	<input type="radio"/>			1.00	0.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
	2	112	VIRGIN RESIN	7,264.00	1.00	1.00	EA	2.70	2.70	<input type="radio"/>			1.00	0.00	<input checked="" type="checkbox"/> <input type="checkbox"/>

You can create a partial allocation very quickly, click on the edit button for each line item that you want to remove from Allocation.

Turning off Sales Order Allocation

If you'd like to turn off the Sales Order Allocation feature, follow these instructions.

The screenshot shows the OrderTime Admin interface. The top navigation bar includes Home, Sales, Purchasing, Production, Repairs, Warehouse, and Reports. The main content area is titled 'Admin > Company Preferences'. On the left, a sidebar lists various sections, with 'Sales' highlighted. The main panel shows the 'Sales - Advanced' configuration page. The 'Enable Allocation' checkbox is checked, and the 'Disable Consignments' checkbox is also checked. Other settings include 'Default Location' set to 'HQ' and various other options for pricing, shipping, and tax calculations.

- Head to Admin > Company Preferences > Sales
- Click on the Advanced Tab
- Uncheck the box that says Enable Allocation
- Click Save

[More about Order Management with Order Time](#)