# **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:

min > Roles > Role							
ole-Sales Rep Role							Save
Name	C	Description			Active 🗸	Role can manage profile list	s 🗆
Sales Rep Role	±	A custom Role cloned from G	M			Role can edit activity histor	/ 🗆
				Can	Role can edit default doc 🗹 number manage EDI/Commerces 🗌 Integrations PO Limit	Can manage accountin Internation Can allocate inventory to Sale Order	5 5
General Sales Purchasing Production	n Warehouse	IP Restrictions Time	e Of Day Restrictions				
TYPE		VIEW	CREATE	EDIT	PRINT/EXPORT	DELETE	ACTIONS
Import		<b>Z</b>	<b>Z</b>	<b>Z</b>			
Attachment		✓	<ul><li>✓</li></ul>	<b>~</b>	✓	✓	Add Exception
Inventory						<b>V</b>	Add Exception
InventoryStatusByLocation		<b>~</b>	<ul> <li>✓</li> </ul>	<b>~</b>	2		Add Exception
InventoryStatusByLocation		✓	✓	<b>~</b>	<b>Z</b>		Add Exception
Report		✓					
							Add Exception
item							

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

### Adding 2 New Columns to the Sales Order List

tch Action	* No.	✓ Search Sales Order	Q 57					0 N	ew Sales Or
] NO	CUSTOMER	DATE PROMISE DATE CUSTOMER PO TOTAL A	MOUNT STATUS	FILL STATUS ORDER SOURCE	SALES ORDER TYPE	SHIP BY DATE	ALLOCATION STATUS	ALLOCATION PERCENT	ACTION
1689	70E Solutions Inc	List Options			-	* 1/2021	None		8 O
1688	68 Proteus Caret					9/2021	Partial	50.0 %	80
1687	68 Proteus Caret	Silters Other				9/2021	Partial	66.666700 %	80
] 1686	68 Proteus Caret	Filters Columns Other				9/2021	All	100 %	80
1684	1111 Nelson Brothers	Available columns		Selected columns		8/2021	None	0 %	80
] 1683	1111 Nelson Brothers	Account #	Add	No.	Тор	8/2021	None	0 %	80
1682	1111 Nelson Brothers	Additional Fee	•	Customer	*	8/2021	None	0 %	80
1681	1111 Nelson Brothers	Additional Fee	Remov	e Date	Up	8/2021	None	0 %	80
1680	1111 Nelson Brothers	Additional Fee Rate	0	Promise Date		8/2021	None	0 %	80
1679	1111 Nelson Brothers	Additional Fee Sales Tax		Customer PO		7/2021	None	0 %	80
		Allow Ship Partial		Total Amount	Bottom				
		Assigned To		Status	x				
		Bill Address Alt. Contact		FilledStatus					
		Bill Address Alt. Phone		Order Source					
		Bill Address Care of	-	Sales Order Type	-				

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

OrderTime															All Ord	lers Demo Sandbox	Logout 🧯
🖷 Home	🌵 Sales	🗮 Purchasi	ng O	§ Production	List Options							- 1	-				
Create New	v	Sales > Sales C	Orders > Sale	Order	Filters Columns Other									Created By Harol	id 9/22/2021 11:39 /	VM Modified By Harold	9/22/2021 11:39 AI
Open Full List	v	<ul> <li>Sales Orde</li> </ul>	r - 1684 🧧	TRANSFER ALLOG	Available columns			Selected	columns							Status A	pproved 🗸
Recent Records	s	General			Bin	*	Add	Image			*	Тор		Summary	Revision : 1		
			No. 1684		Conversion Rate	- 1	0	Line No.				×		Subtotal			1,180.00
1684		Custo	mer 1111 Ne Date 9/22/20	lson Brothers Cha	Customer Part No	- 1	Remove	Item			- 10	Up		Ship Amount	t		0.00
1000698		Promise	Date 9/22/20	21	DefeuleRield		0	Deserter			- 10	-		Discount			-0.00
0 4		Custome	r PO					Descript	on		- 60	-		Additional He	ee 		0.00
49 1690		Cor	itact		Discount %			Available			- 11	Down		Total Amoun	ch (7.00 %)		1 250.00
IN MY KITS					Drop Ship			Quantity			- 61	Bottom		Paid Amount			-1.250.00
MY KIT1					Filled			Open				x		Balance			0.00
# 01001B-N55					ld			UOM									
Repair 1		Items	Details	Memo & Instruc	t Item Type			Price									
		٥			Kg per	*		Ext.			*						
		IMAGE	LINE NO.	ITEM							Same	Count	REF NO	FABRIC STYLE	ALLOCATED	UNALLOCATED	ACTIONS
		1 <sup>0</sup>	1	111							Juic	Context			0.00	1.00	30
		1 <sup>0</sup>	2	111	Spare Parts - Sencorp:o-ring	169.00	1.00	1.00	EA	90.00	90.00	0			0.00	1.00	80
		<b>P</b>	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	0			0.00	1.00	80

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	I 9/22/2021 11:39 AI	M Modified By Harold 9.	22/2021 11:39 AM
Sales Order - 1684 TRANSFER ALLOCATE Create PDF 👻	Export v Print Label v									Status App	roved 🗸
General	Bill Address		Ship Addre	ss				Summary R	evision : 1		
No. 1684	1111 NELSON BROTHERS		1111 NELSON	BROTHERS				Subtotal			1,180.00
Customer 1111 Nelson Brothers Change	2580 WYATT STREET FLOOR/SUITE BILL CARE OF		SHIP 2580 WY SHIP CARE OF	ATT STREET SHI	P FLOOR/SUITE			Ship Amount			0.00
Promise Date 9/22/2021	WEST PALM BEACH, FL 33404		WEST PALM B	EACH, FL 33404				Discount			-0.00
Customer PO	Total Margin	526.60	03M					Additional Fee			0.00
Contact	Percentage							FL-Palm Beach	h (7.00 %)		1 350 00
								Paid Amount			-1 250.00
								Balance			0.00
Items Details Memo & Instructions Custom	Payments Ship Docs Dependency	Attachments	Open Activit	ies Activ	vity History						
٥											
IMAGE LINE NO. ITEM DESCRIPTION	AVAILABLE	QUANTITY O	PEN UOM	PRICE	EXT.	CLEARED	REF NO	FABRIC STYLE	ALLOCATED	UNALLOCATED	ACTIONS
1 111 Spare Parts - Sencorpto	ring 169.00	1.00 1.	00 EA	90.00	90.00	0			0.00	1.00	80
2 111 Spare Parts - Sencorpto	-ring 169.00	1.00 1.	00 EA	90.00	90.00	0			0.00	1.00	80
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	0			0.00	1.00	80

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

Sales → Sales	Orders > Sale	e Order												Created By Haro	ld 9/22/2021 11:39	AM Modified By Haro	ld 9/22/2021	11:39 AN
Sales Ord	er - 1684	ALLOCATE DEA	Create PDF	- Export	Print Label	w.										Status	Approved	~
General				Bill Addres	is			S	hip Addre	55				Summary	Revision : 1			
	No. 1684			1111 NELSO	N BROTHERS			11	111 NELSON	BROTHERS				Subtotal			1	,180.00
Cust	tomer 1111 N	lelson Brothers Ch	ange	2580 WYATT	STREET FLOOR/SUIT	E		St	HIP 2580 WY	ATT STREET SH	IIP FLOOR/SUITE			Ship Amoun				0.00
Promise	Date 9/22/2	021		WEST PALM I	- BEACH, FL 33404			W	EST PALM B	EACH, FL 33404	4			Discount				-0.00
Custom	er PO			Total N	largin		526.6	i0 U	SA					Additional F	ee .			0.00
Co	ontact			Total N	largin 44.6300 %									FL-Palm Bea	ch (7.00 %)			70.00
				reree	indige.									Total Amour	nt.		1	,250.00
														Paid Amoun	t		-1	,250.00
														Balance				0.00
Items	Details	Memo & Instru	ictions Custom	Payments	Ship Docs	Dependency	Attachment	s Op	en Activit	ies Acti	ivity History							
\$																		
IMAGE	LINE NO.	ITEM	DESCRIPTION			AVAILABLE	QUANTITY	OPEN	UOM	PRICE	EXT.	CLEARED	REF NO	FABRIC STYLE	ALLOCATED	UNALLOCATED	ACTIO	DNS
, and the second	1	111	Spare Parts - Sencor	p:o-ring		167.00	1.00	1.00	EA	90.00	90.00	0			1.00	0.00	ß	0
Ŵ	2	111	Spare Parts - Sencor	p:o-ring		167.00	1.00	1.00	EA	90.00	90.00	0			1.00	0.00	ß	0
	3	Hard Drive	HARD DRIVE WITH 2	56 GIGAS SATA-II a	ind MORE	43.00	1.00	1.00	EA	1,000.00	1,000.00	0			1.00	0.00	ß	0

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.

es Orders												
		3 items checked										
atch Action	*		No.		<ul> <li>Search S</li> </ul>	ales Order		Q 7				
Change Status	•	Allocate	DATE	PROMISE DATE	CUSTOMER PO	TOTAL AMOUNT	STATUS	FILL STATUS	ORDER SOURCE	SALES ORDER TYPE	SHIP BY DATE	ALLOCATION STATUS
Allocation	Þ	Deallocate Solutions Inc	10/5/2021	10/5/2021	423423424	0.00	Processing	None	Phone/Fax/Email		10/1/2021	None
Create PDF	P.	roteur Carat	0/22/2021	0/22/2021	123123121	82.70	Approved	None	Phone/Fax/Email		9/19/2021	Pactial
Export	Þ	roteus carec	9/25/2021	9/25/2021		002.70	Approved	None	Phone/Pax/Email		9/19/2021	Partial
Print Label	•	roteus Caret	9/23/2021	9/23/2021		983.70	Approved	ivone	Phone/Fax/Email		9/19/2021	Partial
end Email		roteus Caret	9/23/2021	9/23/2021		83.70	Approved	None	Phone/Fax/Email		9/19/2021	Partial
1684	111	1 Nelson Brothers	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	All
1683	111	1 Nelson Brothers	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None
1682	111	1 Nelson Brothers	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None
1681	111	1 Nelson Brothers	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None
1680	111	1 Nelson Brothers	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None
1679	111	1 Nelson Brothers	9/21/2021	9/21/2021		1,250.00	Approved	None	Phone/Fax/Email		9/17/2021	None
							< Prev	1 ♥ of 69 Total Records: 68	Next >			

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**

	r - 1686 🛛 🗛 🗠 🗛	CATE DEAL	LOCATE Create PDF -	Export -	Print Label	*									Status	Approved
General				Bill Addres	s				Ship Addre	s				Summary Revision : 1		
	No. 1686			68 PROTEUS	CARET				68 PROTEUS (	ARET				Subtotal		83.70
Custo	mer 68 Proteus C	aret Change		2910 WILDRO SOLITHEIELD	/SE LANE MI 48075				2910 WILDRO SOLITHEIELD	5E LANE MI 48075				Fedx		0.00Nor
Promise (	Date 9/23/2021			US					US					Discount		-0.0/
Custome	r PO			Total M	argin		1	5.75						Additional Fee		0.0
Con	itact			Total M	argin 18.8200 %									FL-Miami-Dade (6.00 %)		0.0/
				Percei	nage									Total Amount		83.7/
														Paid Amount		-83.7/
														Balance		0.0/
Items	Details Me	mo & Instru	ctions Custom	Payments	Ship Docs	Dependency	Attachme	nts (	Open Activit	ies Ac	tivity History					
*																
~																
IMAGE	LINE NO.	ITEM	DESCRIPTION		AVAILABLE	QUANTITY	OPEN	UOM	PRICE	EXT.	CLEARED	REF NO	FABRIC STYLE	ALLOCATED	UNALLOCATED	ACTIONS
	LINE NO. 1	ITEM 111	DESCRIPTION Spare Parts - Sencorp:o-	ring	AVAILABLE 167.00	QUANTITY	<b>OPEN</b> 1.00	UOM EA	PRICE 81.00	EXT. 81.00	CLEARED	REF NO	FABRIC STYLE	ALLOCATED	UNALLOCATED	
IMAGE	LINE NO. 1 2	птем 111 112	DESCRIPTION Spare Parts - Sencorp:o-	ring	AVAILABLE 167.00 7,264.00	QUANTITY 1.00 1.00	OPEN 1.00 1.00	UOM EA EA	PRICE 81.00 2.70	EXT. 81.00 2.70	CLEARED O	REF NO	FABRIC STYLE	ALLOCATED 1.00 1.00	UNALLOCATED 0.00 0.00	ACTIONS

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

Sales + Sales Orders + Sales Order Line			
Sales Order Line for Sales Order 1686			Reset
Item 112 Open Quantity 1.00 Aflicated 1.00 Unallecated 0.00		Line No. 2	
General Custom Bins Available Promise Dates			
• • •			O Add
BIN A	QUANTITY		ACTIONS
Floor	1.00		80
	Total	Records: 1	_

Click on the Bins tab and change the quantity Allocated or click on the X to remove that Bin and its Quantity from Allocation.

Sales > Sales	Orders > Sale	e Order											Cre	ated By Harold 9/23/2021 1:0	AM Modified By Ian I	Benoliel 10/5/2021 2:14 PM
Sales Ord	er - 1686 🌘	ALLOCATE DE	ALLOCATE Create PDF	• Export •	Print Label	v									Statu	JS Approved V
General				Bill Addres	is				Ship Addre	ss				Summary Revision : 1		
	No. 1686			68 PROTEUS	CARET				68 PROTEUS	CARET				Subtotal		83.70
Cus	tomer 68 Prot	teus Caret Chang	e	2910 WILDRO	DSE LANE MI 48075				2910 WILDRI SOUTHEIELD	DSE LANE MI 48075				Fedx		0.00Non
Promis	Date 9/23/20 Date 9/23/20	021		US					US					Discount		-0.00
Custon	ier PO			Total N	fargin			15.75						Additional Fee		0.00
C	ontact			Total N Perce	fargin 18.8200 9 ntage	6								FL-Miami-Dade (6.00 %)		0.00
														Total Amount		83.70
														Paid Amount		-83.70
														Balance		0.00
Items	Details	Memo & Instr	uctions Custom	Payments	Ship Docs	Dependency	Attachm	ents	Open Activi	ties A	ctivity History					
\$																_
IMAGE	LINE N	O. ITEM	DESCRIPTION		AVAILABLE	QUANTITY	OPEN	UOM	PRICE	EXT.	CLEARED	REF NO	FABRIC STYLE	ALLOCATED	UNALLOCATED	ACTIONS
, dir	1	111	Spare Parts - Sencorp:o	-ring	167.00	1.00	1.00	EA	81.00	81.00	0			1.00	0.00	ߨ
GrderTime	2	112	VIRGIN RESIN		7,265.00	1.00	1.00	EA	2.70	2.70	0			0.00	1.00	80
														-		

When you go back to the Sales Order you can see that one line item is Allocated and the other is Unallocated.

Sales > Sales Order	5												
Sales Orders													* 0 *
Batch Action	۳ No.		♥ Searc	h Sales Order		Q V	,					O Nev	w Sales Order
□ NO. ▼	CUSTOMER	DATE	PROMISE DATE	CUSTOMER PO	TOTAL AMOUNT	STATUS	FILL STATUS	ORDER SOURCE	SALES ORDER TYPE	SHIP BY DATE	ALLOCATION STATUS	ALLOCATION PERCENT	ACTIONS
1689	70E Solutions Inc	10/5/2021	10/5/2021	423423424	0.00	Processing	None	Phone/Fax/Email		10/1/2021	None		200
1688	68 Proteus Caret	9/23/2021	9/23/2021		83.70	Approved	None	Phone/Fax/Email		9/19/2021	Partial	50.0 %	200
1687	68 Proteus Caret	9/23/2021	9/23/2021		983.70	Approved	None	Phone/Fax/Email		9/19/2021	Partial	66.666700 %	200
1686	68 Proteus Caret	9/23/2021	9/23/2021		83.70	Approved	None	Phone/Fax/Email		9/19/2021	Partial	50.0 %	200
1684	1111 Nelson Brothers	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	All	100 %	200
1683	1111 Nelson Brothers	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None	0 %	200
1682	1111 Nelson Brothers	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None	0 %	C 0 0
1681	1111 Nelson Brothers	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None	0 %	C 0 0
1680	1111 Nelson Brothers	9/22/2021	9/22/2021		1,250.00	Approved	None	Phone/Fax/Email		9/18/2021	None	0 %	200
1679	1111 Nelson Brothers	9/21/2021	9/21/2021		1,250.00	Approved	None	Phone/Fax/Email		9/17/2021	None	0 %	C 0 0
						< Prev	1 ♥ of 69 otal Records: 68	Next >					

On the Sales Order list you can now see that the Sales Order has a Partial Allocation and the exact percent of the items on the order that are Allocated.

- When the Ship Doc is created from the Sales Order, only the Allocated Inventory will be filled.
- A Partial Allocation will just create a partial Ship Doc, another Ship Doc will need to be created when the rest of the order is filled.

# **Turning off Sales Order Allocation**

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

# Home	& Sales		O? Production	& Repairs	Warehouse	A Reports	
dmin ⊧ Comp	any Preferences				, v		
ompany P	references						Save
Section		General	Price Level Rounding	Advanced			
General							
Activities		Sales - Ad	vanced				
Doc #s		📋 Limit i	tems for selling to items that h	have an item # listed	for the current customer		
Items		Use la	st customer price (ignores pric	cing levels)			
Inventory		U When	adding items to sales docume	ents show all price le	vel pricing, including price	levels assigned to other customers.	
Sales		Move .	attachments from quote to sa	les order on convers	ion.		
Shipping		Apply	price levels to Kit selections.				
Payments		C Requir	e Ship Method.				
Purchasing		Show	kit selections on sales orders a	and quotes.			
Receiving		Calcul	ate tax rates based on zip cod	es instead of Item Si	lles Tax		
Production		C Round	I sales tax to the nearest penn	y. Uncheck to round	down.		
Los / Social Be		Enable	printing a torm template with	las asdas	and as rows instead of in	matrix tormat.	
Renais Orders		Z Tran	sferring from a sales order is	used for consignment	и.		
Nepair Orders		Default Lo	cation				
Mobile		HQ			*		
mail and calen	uar entegration	Enable	Location lookup based on Sh	ipping Regions			
		Highlight	tht line items with inventory d	leficiencies			
		C Enable	charging additional fees on c	orders			
		U When	adding an item to a quote or :	sales order, increme	nt the quantity instead of	idding a new line no.	
		🗌 Valida	te Shipping Address				
		🛃 Enable	Allocation				
		🛃 Disabl	e Consignments				

- 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