

Auto Allocate for Ecommerce

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Overview

When integrating Order Time with an Ecommerce solution you can automatically import transactions from the Ecommerce software into Order Time as Sales Orders. When importing these transactions to Sales Orders you can automatically set the Status of the Sales Order to Approved.

If the transactions are imported to Order Time and automatically set to Approved, then you can also automatically Allocate the inventory to the Sales Order.

Solution

To enable the Automatic Allocation feature

- Go to the Admin screen by clicking your company's name at the top right
- Then click Company Preferences in the middle section
- On the Company Preferences screen click Sales and then click the Advanced tab
- Make sure the Enable Allocation is checked
- Then click the checkbox for Automatically allocate when status is changed approved as shown in the red box

Company Preferences

Section

General

Activities

Doc #s

Items

Inventory

Sales

Shipping

Payments

Purchasing

Receiving

Production

Lot / Serial #s

Repair Orders

Mobile

Mail and Calendar Integration

General

Price Level Rounding

Advanced

Sales - Advanced

- Limit items for selling to items that have an item # listed for the current customer
- Use last customer price (ignores pricing levels)
- When adding items to sales documents show all price level pricing, including price levels assigned to other customers.
- Move attachments from quote to sales order on conversion.
- Apply price levels to Kit selections.
- Require Ship Method.
- Show kit selections on sales orders and quotes.
- Calculate tax rates based on zip codes instead of Item Sales Tax
- Round sales tax to the nearest penny. Uncheck to round down.
- When printing a form template with styles, show the variants as rows instead of in matrix format.
- Enable creating a transfer from a sales order.
- Transferring from a sales order is used for consignment.

Default Location

HQ

- Enable Location lookup based on Shipping Regions
- Highlight line items with inventory deficiencies
- Enable charging additional fees on orders
- When adding an item to a quote or sales order, increment the quantity instead of adding a new line no.
- Validate Shipping Address
- Enable Allocation
- Automatically allocate when status is changed to approved
- Disable Consignments
- Sales Order promise dates should be the date it is converted from a quote
- Allow recalculating pricing on Quotes & Sales Orders
- Warn of dependencies before setting status to void
- Load Can Make on Sales Order and Quote Line Items