Receiver Allocation

Last Modified on 09/14/2023 10:26 am EDT

Overview

Receiving Docs reflect what Items have been shipped by a Vendor and received at your location. You have the ability to Allocate this received inventory from a Receiving Doc. You will need to access Company Preferences from your Admin page and select Receiving. You will need to check the box that says, "Enable Receiver Allocation"

Please note this feature is currently in Beta



Once the Status of the Receiving Doc has moved to a Received status, you will be able to begin allocating by selecting the orange ALLOCATE button located above the General section of the Receiving Document.

Home	🛷 Sales 🛛 📜 Puri	hasing Of Production	on 🕫 Renta	als de Repa	irs 😭 Warehouse	Reports					
	eivers + Receiver								Created By Ian Benoliel 9/12/2023 4:33 PM	Modified By Ian Benolie	19/13/2023
eiver - 117	77 EDIT ALLOCATE	DD COST Create PDF +	Export - Print	t Label 🔍						Status	Received
eneral				Bill Add	dress map			Summary Revision : 1			
No	. 1177			TENNIST	IME			Subtotal		177.3	3
	r TennisTime				AND SLAM AVENUE STE. #20 RK, NEW YORK 01616			Charges		0.00	
Expected Date	e 9/12/2023			USA	N, NEW TORK OTOTO			Total Amount		177.3	3
	stails Memo & Instruc		ichments Oper		ivity History				O Add 1	tems From Open Pure	hase Or
Name/Numbe		ions Custom Atta Search Item		Scan 🕸	ivity History EXT. VALUE /	MOUNT	LINKED OPEN QUANTITY	CONVERSION RATE		tems From Open Pure	chase Ore
Name/Numbe	r v	Search Item	иом	OST		MOUNT 33.33	LINKED OPEN QUANTITY 0.00	CONVERSION RATE		LUME EXT. AC	
Name/Numbe	or v	Search Item	UOM EA	COST 2.08	EXT. VALUE A			CONVERSION RATE		LUME EXT. AC 80.00	TIONS
tems De Name/Numbe ITEM 01-1202 02-2506 03-1480	or v	Search Item QUANTITY 16.00	UOM EA EA	COST 2.08 9.00 1.	EXT. VALUE /	33.33	0.00	CONVERSION RATE		LUME EXT. AC 80.00 27 0.00 27	TIONS

If there are not any items to Allocate, you will be presented with the following error message:

Nothing on this document to allocate.

If inventory is available to Allocate, after selecting the ALLOCATE button, you will be presented with the MRP for Receiver page. The page will reflect:

- Which Receiver is being presented
- The Description of the Item
- The number Available to be allocated

derTime		Search		Q	AODEMO	Staging Logout				
Home	🛷 Sales	📜 Purchasing	Q [®] Production	🎓 Rentals 🛛 🛷 Repairs	🗑 Warehouse 🛛 🚯	leports				
hasing ⊦	Receivers > Receive	er MRP								
P For R	eceiver 1179									Ca
Line 1: 01	-1202		Descripti	ion The main part	Available 15.00		Required 778.00		Applied 0.00	
	TRAN TYPE	NO.	LINE NO.	RELATED TO ENTITY NAME	PR	DMISE DATE DATE	STATUS	QUANTITY	APPLIED	BALANCE
	Sales Order	322	7	Kelsey	8/2	/2018 7/26/20	18 Ready to Shi	p 6.00	0.00	6.00
	Sales Order	1024	2	Get Sauced	8/3	0/2019 8/30/20	19 Approved	718.00	0.00	718.00
	Sales Order	1136	4	A SHORE THING (CHARLESTOWN)	2/1	2/2020 2/12/20	20 Approved	6.00	0.00	6.00
	Sales Order	1162	4	68 Proteus Caret	3/2	7/2020 3/27/20	20 Approved	3.00	0.00	3.00
	Sales Order	1415	4	Advance Packaging Technologies	11.	30/2020 11/30/2	020 Approved	3.00	0.00	3.00
	Sales Order	1754	8	70E Solutions Inc.job 556	10.	27/2021 10/27/2	021 Approved	3.00	0.00	3.00
	Sales Order	2340	4	1496 Ontario Inc.	12	20/2022 12/20/2	022 Approved	6.00	0.00	6.00
	Sales Order	10024	4	1496 Ontario Inc.	1/1	2/2023 1/12/20	23 Approved	3.00	0.00	3.00
	Sales Order	10024	16	1496 Ontario Inc.	1/1	2/2023 1/12/20	23 Approved	3.00	0.00	3.00
	Work Order	213	1	Internal	6/3	/2019 6/3/201	9 Waiting	7.00	0.00	7.00
	Work Order	214	1	Internal	6/3	/2019 6/3/201	9 Walting	15.00	0.00	15.00
	Work Order	321	2	Internal	5/2	0/2020 5/20/20	20 Waiting	3.00	0.00	3.00
	Work Order	328	2	Internal	50	0/2020 5/20/20	20 Waiting	2.00	0.00	2.00

On this page you will then select the Sales Order you wish to apply the allocation to and click on 0.00 in the APPLIED column of that Sales Order. This will open a field window allowing you to enter the number of items you are allocating to this specific Sales Order. Once entered you can select the Next button at the bottom of the page.

derTim		Search		Q						Q AODE	MO Staging Logo
Home	🛷 Sales	📜 Purchasing	O [®] Production	🎓 Rentals 🛷 Repain	s 🜍 Warehouse	Reports					
chasing)	Receivers > Receive	r MRP									
RP For F	Receiver 1179										
Line 1: 01	-1202		Descripti	on The main part	Available	15.00	Requ	ired 778.00		Applied 0.00	
	TRAN TYPE	NO.	LINE NO.	RELATED TO ENTITY NAME		PROMISE DATE	DATE	STATUS	QUANTITY	APPLIED	BALANCE
	Sales Order	322	7	Kelsey		8/2/2018	7/26/2018	Ready to Ship	6.00	0.00	6.00
	Sales Order	1024	2	Get Sauced		8/30/2019	8/30/2019	Approved	718.00	(4	718.00
Π.	Sales Urder	1130	4	A SHURE THING (CHARLESTOWN)		2/12/2020	2/12/2020	Approved	0.00	0.00	0.00
	Sales Order	1162	4	68 Proteus Caret		3/27/2020	3/27/2020	Approved	3.00	0.00	3.00
	Sales Order	1415	4	Advance Packaging Technologies		11/30/2020	11/30/2020	Approved	3.00	0.00	3.00
	Sales Order	1754	8	70E Solutions Inc.job 556		10/27/2021	10/27/2021	Approved	3.00	0.00	3.00
	Sales Order	2340	4	1496 Ontario Inc.		12/20/2022	12/20/2022	Approved	6.00	0.00	6.00
	Sales Order	10024	4	1496 Ontario Inc.		1/12/2023	1/12/2023	Approved	3.00	0.00	3.00
	Sales Order	10024	16	1496 Ontario Inc.		1/12/2023	1/12/2023	Approved	3.00	0.00	3.00
	Work Order	213	1	Internal		6/3/2019	6/3/2019	Waiting	7.00	0.00	7.00
	Work Order	214	1	Internal		6/3/2019	6/3/2019	Waiting	15.00	0.00	15.00
	Work Order	321	2	Internal		5/20/2020	5/20/2020	Waiting	3.00	0.00	3.00
	Work Order	328	2	Internal		5/20/2020	5/20/2020	Waiting	2.00	0.00	2.00

Selecting the Next button will bring you to the Summary page of the allocation you have chosen and if you are satisfied with your choices you can select the green PROCESS button in the upper right hand portion of the page.

rderTime	Search		Q							AODEM	O Staging Log	gout
# Home 🛷 Si	eles 🗮 Purchasing	O [®] Production	rs Rentals	🛷 Repairs	Warehouse	Reports						
urchasing + Receivers +	Receiver MRP											
IRP For Receiver 1	179										Process	Can
mmary												1
TRAN TYPE	NO. L	INE NO.	RELATED TO ENTITY NAME		PROM	ISE DATE	DATE	STATUS	QUANTITY	APPLIED	BALANCE	
Sales Order	1024 2		Get Sauced		8/30/2	019	8/30/2019	Approved	718.00	6.00	712.00	
						< Prev						

To confirm your allocation you can review the Sales Order you allocated to and verify your allocation process.

order Time		Search			Q													O A	ODEMO Staging	Logout	6
# Home	🛷 Sales	`∰ Pur	rchasing	Q ₀ ⁰ Produ	ction	🕫 Rentals	🛷 Repa	irs 📦	Warehouse	🖨 R	eports										
Sales → Sales Orde	ers ⊧ Sale Orde	er														Created By lar	Benoliel 8/30/2	19 4:57 PM Mo	dified By lan Benoliel	8/24/2020 5	:12 P
Sales Order -	1024 From 0	Quote 91 🚺	DIT CUSTOM FI	ILDS ALLOCA	DEALLO	CATE SPLIT	Create PDF	+ Export	+ Print Label	w									Status Ap	proved	,
General					Bill	Address					Ship Ad	iress				Summary F	levision : 1				e
No	N 1024				GET	SAUCED					GET SAUG	ED				Subtotal				40,05	30.00
	r Get Sauced	Change				CM										Ship Amount					0.00
Date Promise Date	e 8/30/2019															Discount Am	ount				-0.00
Customer PC																Taxes					0.00
Contac	t															Total Amoun				40,05	50.00
Total Margir																Paid				-15	50.00
Total Margir Percentage																Balance				39,90	00.00
Items De	etails Me	mo & Instru	ctions	Custom P	ayments	Ship Docs	Dependenc	y Depend	dency Item	Attachme	ents Op	en Activities	Activity History								
GROUP	IMAGE	LINE NO.	ITEM	DESCRIPTION		QUANTITY	UOM	DISCOUNT %	STD. PRICE	PRICE	EXT.	AVAILABLE	NET AVAILABLE	ALLOCATED	CLEARED	OPEN QUANTITY	DROP SHIP	ITEM TYPE	TAGS	ACTION	IS
Parts Group		1	1111	Spare Parts - S	Sencorp:o-ring	1.00	EA	0.0 %	0.00	50.00	50.00	2,154.00	1,651.00	0.00	0	0.00	0	Part		80	2
Parts Group	() - menoration	2	01-1202	The main part		800.00	EA	0.0 %	50.00	50.00	40,000.00	594.00	-151.00	6.00	p	718.00	0	Part	to sales order	80	,

To add the ALLOCATED column to your Sales Order > Items Tab, select the Cog wheel.

derTime	Search			Q													• 4	ODEMO Staging	Logout
Home 🛷 S	ales 🛛 👾 F	urchasing	Q [®] Produ	ction 🔊	Rentals	🛷 Rep	nirs 📦	Warehouse	¢ R	eports									
es → Sales Orders → Se	ale Order														Created I	y lan Benoliel 8/30/2	2019 4:57 PM Mo	dified By Ian Benoliel	8/24/2020
les Order - 1024	From Quote 91	EDIT CUSTOM F	HELDS ALLOC	ATE DEALLOCA	TE SPLIT	reate PDF	* Export	+ Print Labe	U V									Status Ap	proved
General				Bill Ad	dress					Ship Ad	iress				Summa	ry Revision : 1			
No. 1024				GET SA	UCED					GET SAUG	ED				Subtotal				40,0
Customer Get S					CM										Ship Am	ount			
Date 8/30/ Promise Date 8/30/															Discoun	Amount			
Customer PO	2019														Taxes				
Contact															Total Arr	ount			40,
Total Margin 19,98															Paid				
Total Margin 50.01 Percentage	%														Balance				39,9
tems Details	Memo & Instr			ayments S		Dependen	, ,	lency Item	Attachm		en Activities	Activity History							
GROUP IMA	SE LINENO.	ITEM	DESCRIPTION		QUANTITY		DISCOUNT %	STD. PRICE	PRICE	EXT.	AVAILABLE	NET AVAILABLE	ALLOCATED	CLEARED		ITY DROP SHIP	ITEM TYPE	TAGS	ACTIC
Parts Group		1111	Spare Parts -	Sencorp:o-ring	1.00	EA	0.0 %	0.00	50.00	50.00	2,154.00	1,651.00	0.00	0	0	.00 ()	Part		8
Parts Group	2	01-1202	The main par		800.00	EA	0.0 %	50.00	50.00	40.000.00	594.00	-151.00	6.00	0	71	.00 00.	Part	to sales order	
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This will open the List Options window where you will select Allocated from the Available columns section, click the Add button in the center of the window, and then Allocated will be moved into your Selected columns. You can always move columns via the direction arrows to the right of the window in order to present information on the Sales Order in the manner most important.

Add Selected columns 1000 Units Add Billed Image: Can make Can make Nemove Class Available Com Amount Cleared Commission Open Quantity Conversion Rate Tops Ship Customer Part No Tags	Filters Columns Other			
Note Only is Billed Bin Can make Class Com Amount Com Rate Conmission Conversion Rate Conversion Rate Customer Part No Image: Conversion Rate Conversion Rate Tops Ship Item Type Tags	Available columns		Selected columns	
Billed Bin Can make Class Com Amount Com Rate Conversion Rate Conversion Rate Conversion Rate Customer Part No Ext. Available Net Available Net Available Open Quantity Drop Ship Item Type Tags	1000 Units	A	The	
Bin Available Available Available Intervention of the second seco	Billed		Ext.	
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Conversion Rate Customer Part No	Com Rate		Open Quantity	x
Customer Part No	Commission		Drop Ship	
	Conversion Rate		Item Type	
Save	Customer Part No	-	Tags	-
				Save