



# **Global 3000 Enhancement**

## **Automatic works order allocation**

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<b>Project</b>	Document1		
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## INTRODUCTION

The requirement is to introduce an automatic works order allocation function.

After the receipt of purchase orders or goods into stock a method is required that allows all back ordered works order lines to be checked and allocated if stock is available.

A new “Allocate all” function will be added to the existing Allocation frame.

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## DOCUMENTATION CHANGES

### Overview

**Allocation** The allocation stage in the order processing cycle is responsible for allocating stock to works orders. The following allocation options are available.

- Allocate all works orders.
- Allocate or de-allocate selected works order.
- Allocate or de-allocate selected works order line
- Part allocate selected works order line.
- Over allocate selected works order line.

The Allocation process performs the following functions.

- Compares the current un-allocated works order lines with available component stock and allocates where available.

**Note** Allocating a works order line reduces the free stock of the component.

- Establishes notional batch and serial number usage for batch tracked and serially numbered components.

**Note** For batch tracked and serially numbered components, the batch & serial numbers that would be used if the component stock were being issued rather than allocated are recorded at allocation and presented as preferred stock details on the picking list. At issue, if the preferred stock is no longer available, these details can then be amended to reflect the batch and serial numbers of the stock actually issued.

Works orders to be listed for allocation can be selected according to the following criteria.

- Works order number
- Finished goods location
- Manufactured product
- Picking list number
- Sales order number

The allocated stock figure maintained within distribution is the total of stock allocated to sales orders plus the stock allocated to works orders. There are facilities within the standard stock enquiries that allow allocations to be viewed by order type.

If present, sub-assembly works orders associated with the works order being allocated, can optionally be allocated at the same time.

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## Allocation

### *Application Buttons*

**Allocate all** This allows you to process all works orders within the scope of the Allocate works order window. If a “Find” process has been performed and a limited set of works orders is currently being displayed, it is this list of works orders that are processed.

Works orders are allocated in works order number sequence, any back ordered lines are checked against the current free stock figures and allocated if possible.

When all works orders have been processed an information window is displayed detailing the number of orders processed and lines allocated.

After viewing the information window, an allocations report is printed. For each works order processed, the report shows the total stock allocated, stock still to be allocated, available stock and any reasons why a full allocation didn't take place.

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