



Global 3000 Service Pack Note

Automatic Allocation - Re-Reserve Purchase Orders

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Project	ZS60_000224.doc		
Version	1.0		1 of 4

INTRODUCTION

This service pack updates Automatic Allocation to provide an option to re-reserve purchase orders for queued products.

If there are a number of purchase orders for which the incoming stock has been reserved by sales orders, the stock queue is not repositioned if a new purchase order is added that is due to arrive earlier than some of the existing reserved purchase orders.

The changes are:

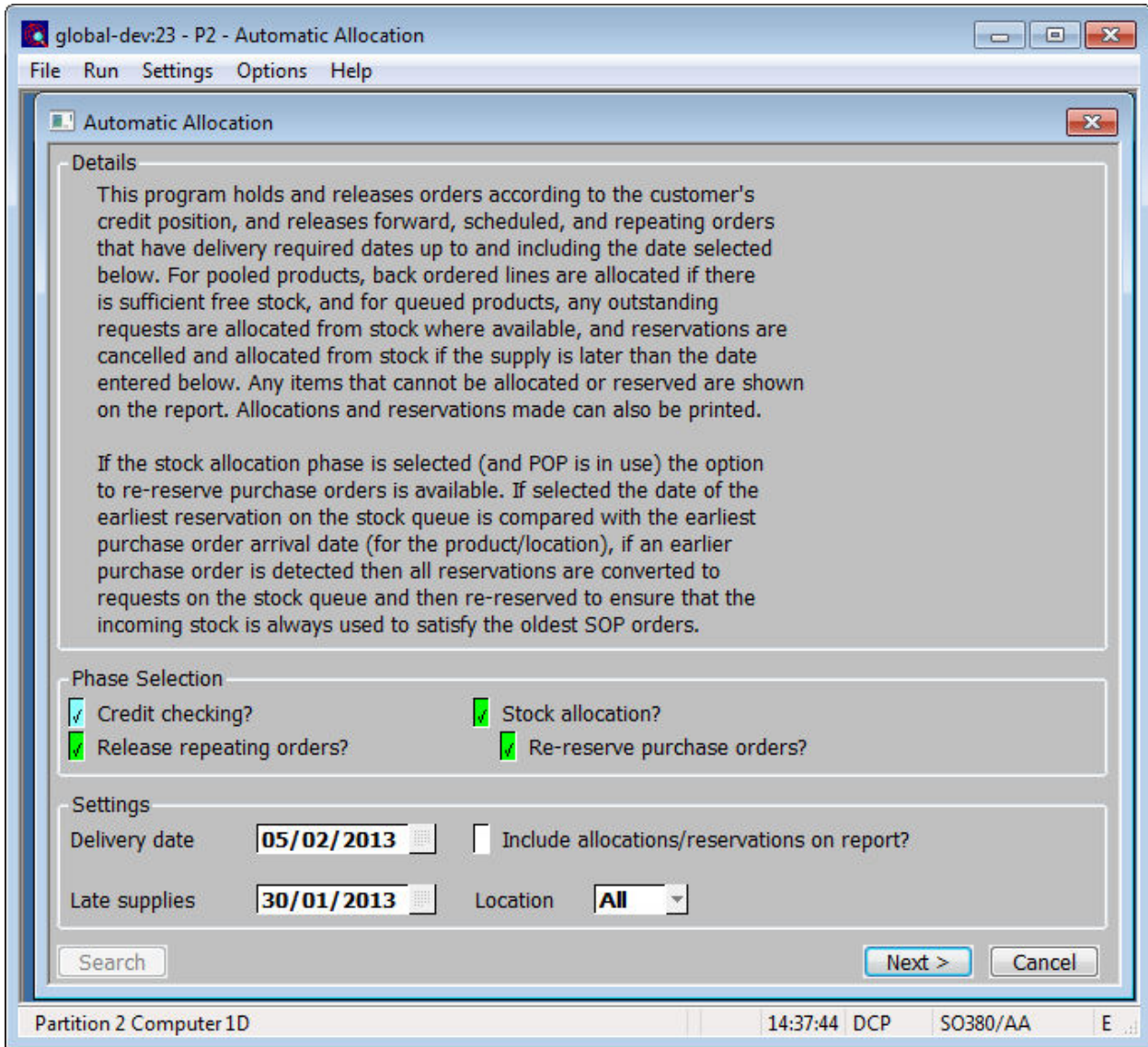
A new option labelled 'Re-reserve purchase orders?' has been added to the options available within SOP automatic allocation.

When set automatic allocation checks for new purchase orders that are expected earlier than the earliest purchase order that has been reserved against; if one is found all reservations are converted to requests and the stock queue for the product is re-processed to ensure that the oldest SOP transaction lines are satisfied first.

These changes do not affect queue records created by Global 3000 Manufacturer for works order lines.

Author	DCP		
Project	ZS60_000224.doc		
Version	1.0		2 of 4

Automatic Allocation Window



This window appears when you select Automatic Allocation from the Order Processing menu.

Purpose Automatic Allocation operates in three selectable phases; these are credit checking, the release of repeating orders and stock allocation. This window allows the user to specify which phases are required along with other settings controlling the automatic allocation run.

The prompts are:

- Credit checking?** Set this to run the credit checking phase of Automatic Allocation.
- Release repeating orders?** Set this to run the release repeating orders phase of Automatic Allocation.
- Stock allocation?** Set this to run the stock allocation phase of Automatic Allocation.

Author	DCP	
Project	ZS60_000224.doc	
Version	1.0	3 of 4

Re-reserve purchase orders? *(Only available if purchase order processing is in use and the stock allocation phase is selected)* This setting only applies to queued products. When set automatic allocation checks for new purchase orders that are expected earlier than the earliest purchase order that has been reserved against; if one is found all reservations are converted to requests and the stock queue for the product is re-processed to ensure that the oldest SOP transaction lines are satisfied first.

For example Assuming that automatic allocation is run at the beginning of December and that there are three purchase orders with expected dates in February, March and April and that their quantities are reserved by sales order lines.

If a new purchase order is raised with a supplier that will deliver the goods in January, the new purchase order will have an earlier expected date than the other three purchase orders. New sales order lines will be reserved against this new purchase order and will therefore be satisfied earlier than the older sales order lines.

If the re-reserve purchase orders option is set then this situation will be detected, all existing reservations (for the product) will be converted to requests, the stock queue is then re-processed so that the earliest sales order lines are reserved against the earliest incoming purchase orders.

Delivery date This defaults to today's date plus the lead time in days for forward orders (as set in System Parameters) and is compared with the required date of transaction lines when determining whether forward, scheduled and repeating orders are to be released.

Late supplies This date is for stock queue entries, as a safety net in case requests have not been actioned by their supply source. Automatic Allocation will attempt to allocate requests with a 'needed by' date on or before this date. Enter zero if this is not required.

Include allocations/reservations on report? Set this for a full allocations report for this run, showing all allocations and reservations made, as well as any items that cannot be allocated or reserved. If this is not set a simplified report is produced which only shows details of items that could not be allocated or reserved and why.

Location *(Only if multiple locations are permitted.)* The location at which stock is to be allocated. A search is available.

Author	DCP		
Project	ZS60_000224.doc		
Version	1.0		4 of 4