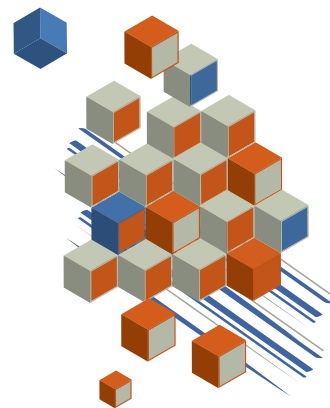




# Sales Order Fulfillment

**SIMMS** Inventory Management Software 8.0

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# Sales Order Fulfillment

Sales order fulfillment is the process used to meet the demand on a sales order.

You process sales orders in the Fulfillment Manager. From this single window you can list all your sales orders that require filling. In addition, you have access to the information needed to process these sales orders, such as the quantity of an item sold and the quantity of an item in stock.

Within the same window you can perform the tasks commonly required in the fulfillment process, such as printing a pick list and invoicing your sales order.

The fulfillment process is complicated when there is insufficient stock to meet the demand on your sales orders. To solve this problem you can transfer available stock from its current location to the location it is needed, or replenish your stock by purchasing more of the depleted item. You can perform both tasks directly from the Fulfillment Manager.

## Filling Sales Orders

The Fulfillment Manager is designed as central location in which you can fill your sales orders.

***Tip:** There are many columns of information available in the Fulfillment Manager's grid. You can customize your work environment by removing and adding any of these columns. For example, if there is a column of information you do not need, and would like to remove it, right click the column head, and then click **Remove this Column** from the menu.*

*To add a column, right click any column head, and then click **Column Chooser** from the menu. The Customization window opens. Double-click a column listed in the window to add it to the Fulfillment Manager's grid.*

## List Sales Orders for Fulfillment

The first step in the fulfillment process is to list your sales orders in the Fulfillment Manager.

1. Open the **Sales** menu, open the **Sales** submenu, and then click **Fulfillment Manager**.
2. Under **Filter Options**, click **Query Data**.

By default, SIMMS lists all active sales orders in the Fulfillment Manager.

## Filter Your List of Sales Orders

You may not want to list all active sales orders in the Fulfillment Manager's grid. In this case, you can filter your search results by customer, sales order, category, item, and location.

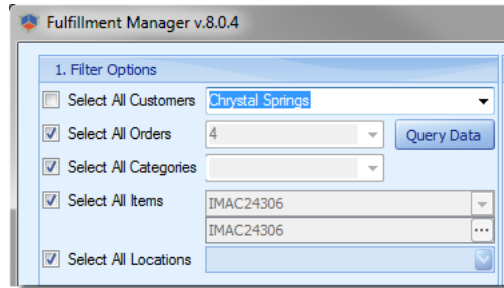


Figure 1: Filter Options.

For example, to filter your search results by a customer, under **Filter Options**, clear the **All Customers** check box, and then select a customer from the list (to the right of the check box). Click **Query Data**.

SIMMS lists only the sales orders for your chosen customer.

## Enter an Item's Fill Quantity

A fill quantity is the quantity of an item you want removed from inventory to fill your sales order.

**Note:** You need to enter an item's fill quantity to perform many of the tasks available in the Fulfillment Manager, such as printing a pick list, creating an invoice, or creating a transfer.

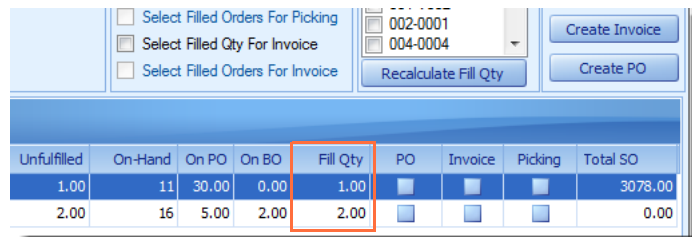


Figure 2: Entering fill quantities.

- ◆ After listing your sales orders in the **Fulfillment Manager**, do one of the following steps:
  - To manually enter a fill quantity, in the **Fill Qty** field, type the fill quantity for your item.

- To have SIMMS automatically enter your fill quantities, click the **Recalculate Fill Qty** button.

The fill quantity that SIMMS enters uses all available stock from your item's default location.

If there is insufficient stock of an item to fill a sales order, SIMMS detects if there is available stock in another location. If this is the case, the Recalculation report and a message appears. The message asks if you want to transfer items from another location to fill your sales order.

## Print a Pick List

A pick list is a document that lists the items and their quantities you want removed (picked) from inventory. As part of the fulfillment process, this document is typically given to warehouse staff who remove the items on the pick list from the warehouse.

1. After listing your sales orders in the **Fulfillment Manager** and entering a fill quantity for your items, in the **Picking** field, click the check box for those items you want to include in your pick list.
2. Under **Actions**, click the **Print Pick List** button.

## Create a Purchase Order

You can create a purchase order from the Fulfillment Manager. You do this when there is insufficient quantity of an item to fill a sales order and you want to replenish your stock. However, you cannot create a purchase order if there is sufficient quantities of the item already on a purchase order or in transit.

For example, if a sales order quantity is 10 and your on-hand quantity is only 5 you can create a purchase order to replenish your stock. But, if your on PO quantity is 20 then you cannot create a purchase order because there is sufficient stock to fill your sales order already on a purchase order.

1. After listing your sales orders in the **Fulfillment Manager**, in the **PO** field, click the check box for the items you want to purchase.
2. Under **Actions**, click the **Create PO** button.

The Reorder Purchase Order window opens.

3. (Optional) In the **Qty** field, edit the quantity of the items you are purchasing.

By default, SIMMS only enters a quantity that is needed to fill your sales order.

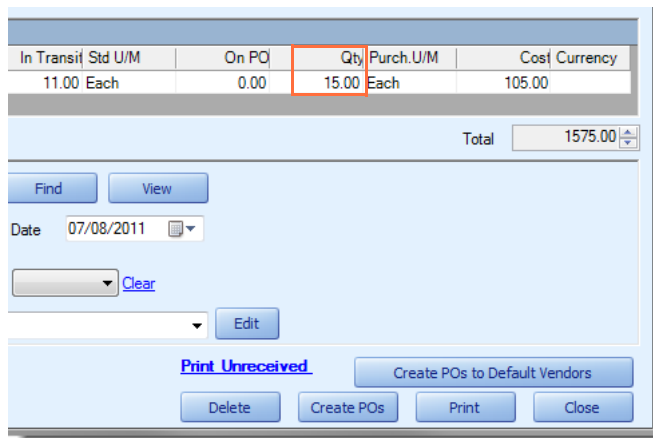



Figure 3: Entering the quantity of an item to purchase.

4. Do one of the following steps:
  - To purchase all your items from a single vendor, in the **Vendor** list, select the vendor you want to purchase your items from and then click **Create POs**.
  - To purchase your items from multiple vendors, click **Create POs to Default Vendors**.

To purchase your items from multiple vendors, each item must have a default vendor. An item's default vendor is entered in the Item Manager as part of its profile.

For both methods, the purchase orders generated are in draft mode.

You need to save these purchase orders in the Purchase Order Manager to process them further.

5. In the **Purchase Order Manager**, open your newly created purchase order, if required edit the purchase order, and then click the **Save** icon .

## Invoice a Sales Order

You can invoice a filled or partially filled sales order. After a sales order is fully invoiced, the sales order is removed from the Fulfillment Manager.

1. After listing your sales orders in the Fulfillment Manager and entering a fill quantity for your items, in the **Invoice** field, click the check box for the items you want to invoice.
2. Under **Actions**, click the **Invoice** button.

SIMMS generates your invoices. You can view and edit your invoices in the Invoice Manager.

## Transfer Inventory to Fill a Sales Order

From the Fulfillment Manager, you can transfer items from one location to another. You do this when there is insufficient stock of an item in its original location and there is available stock in another location.

1. After listing your sales orders in the Fulfillment Manager, under **Recalculation**, click the **Recalculate Fill Quantity** button.

SIMMS automatically detects if insufficient quantities of an item can be replenished with stock from another location. If so, SIMMS generates the Recalculation Report.

This report lists the items that have insufficient stock to fill their sales order, and the location where stock is available.

*SIMMS displays any locations where there is available stock to fill your sales order.*

*SIMMS suggests a location and a transfer quantity.*

| Recalculation Report  |      |                     |           |          |          |             |
|-----------------------|------|---------------------|-----------|----------|----------|-------------|
| Item Description      | UM   | Location            | Available | On Order | Invoiced | Unfulfilled |
| Keyboard 128 Key Dell | Each | 001-0001            | 0.00      | 4.00     | 0.00     | 4.00        |
|                       |      | Location 001-0002 : | 23.00     |          |          | 4.00        |
|                       |      | Location 011-0002 : | 1.00      |          |          | 0.00        |

Figure 4: The Recalculation Report.

2. A dialog box opens, prompting you to create a transfer, click **Yes**.

SIMMS creates a draft transfer for all eligible items on your sales orders, and opens the Transfer window.

3. In the **Transfer** window, click the **Edit** icon .

If required, edit your transfer. For example you can change the quantity of the item being transferred or the location from which it is transferred.

4. Click the **Save** icon .

To view in the Fulfillment Manager any transfer you have created for an item, select the item in the grid, and then under **Actions** click the **Show Transfer** button. You can only view a transfer during the session in which the transfer was created.

## Exclude a Location from Your Recalculation Report

When SIMMS generates the Recalculation Report it lists all the locations in which inventory is available to fill your sales order. You can

exclude any of these locations from the Recalculation Report. You may want to do this to prevent stock from being taken from certain locations.

1. After listing your sales orders in the Fulfillment Manager, under **Recalculation**, click the check box for the locations you want to exclude from the Recalculation Report.

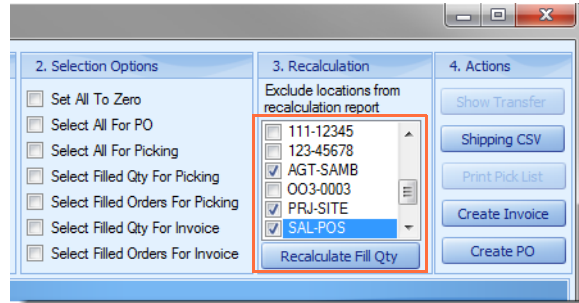


Figure 5: Excluding locations from the Recalculation Report.

2. Click the **Recalculation Fill Qty** button.

SIMMS generates the Recalculation Report without the locations you chose to exclude from the report.

3. Complete your transfer.

## Generate a CSV File of Ship-To Addresses

You can generate a Microsoft Excel CSV file of the shipping addresses on your sales orders. This file is imported to a third party shipping program such as those supplied by FedEx and UPS. In these shipping programs, you use the imported addresses to create your shipping labels.

**Note:** *The ship-to address on your sales order must be selected from the Address Manager. The default ship-to address that SIMMS enters on you sales order does appear in the CSV file. Because of this, you must change the default ship-to address on your sales order to an address from the Address Manager.*

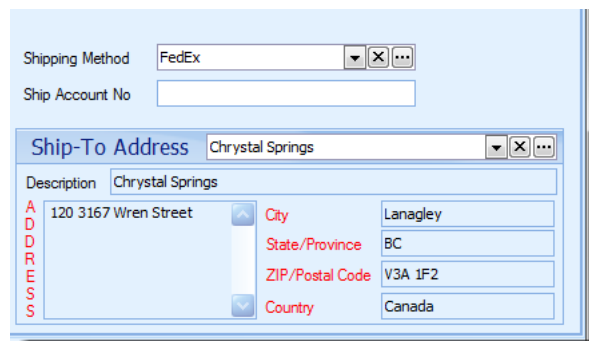


Figure 6: The ship-to for a sales order.

1. After listing your sales orders in the Fulfillment Manager, in the **Invoice** field, click the check box for the customers whose ship-to address you want to list in the CSV file.

2. Click the **Shipping CSV** button.

Microsoft Excel opens with your ship-to addresses listed.

The Save Query Result window also opens.

3. In the **Save Query Result** window, in the **File name** text box, type a name for your CSV file, and then click **Save**.

## Batch Processing Fulfillment Tasks

You can apply many common tasks to more than one sales order at a time. This is helpful if you have many sales orders to process.

### Batch Process Fulfillment Tasks

1. After listing your sales orders in the Fulfillment Manager, under **Recalculation**, click the **Recalculate Fill Qty** button.
2. Under **Selection Options**, click an appropriate option.

See *Table 1: Selection Options*.

**Table 1: Selection Options**

| Select this option:           | To do this:  |
|-------------------------------|--|
| <b>Set All to Zero</b>        | This option sets all your fill quantities to zero.<br><br>Click <b>Set All to Zero</b> , and then click the <b>Recalculate Fill Qty</b> button.  |
| <b>Select All for PO</b>      | This option selects all items that require purchasing.<br><br>Click <b>Select All for PO</b> , and then click the <b>Create PO</b> button.   |
| <b>Select All For Picking</b> | This option selects all items for picking. This includes filled items and partially filled items.<br><br>Click select <b>All For Picking</b> , and then click the <b>Print Pick List</b> button. |

**Table 1: Selection Options**

| <b>Select this option:</b>              | <b>To do this:</b>   |
|---|--|
| <b>Select Filled Qty For Picking</b>    | This option selects all items for picking. This includes filled items and partially filled items.<br><br>Click <b>Select Filled Qty For Picking</b> , and then click the <b>Print Pick List</b> button.                |
| <b>Select Filled Orders for Picking</b> | This option selects all items on a sales order for picking but, only if the sales order is completely filled.<br><br>Click <b>Select Filled Orders for Picking</b> , and then click the <b>Print Pick List</b> button. |
| <b>Select Filled Qty For Invoice</b>    | This option selects all items for invoicing. This includes filled items and partially filled items.<br><br>Click <b>Select Filled Qty For Invoice</b> , and then click the <b>Create Invoice</b> button.               |
| <b>Select Filled Orders For Invoice</b> | This option selects all items on a sales order for invoicing but, only if the sales order is completely filled.<br><br>Click <b>Filled Orders For Invoice</b> , and then click the <b>Create Invoice</b> button.       |

## **Define Fill Quantity Thresholds**

In the Fulfillment Manager SIMMS can automatically generate your fill quantities. You can define the auto-fill rule SIMMS uses to generate these fill quantities.

Your auto-fill rule is the threshold you set for your fill quantities. Any fill quantity that SIMMS generates must meet the threshold you set or SIMMS enters zero as a fill quantity.

The purpose of defining auto-fill rules is to prevent the filling of sales orders that do not meet your pre-defined threshold.

For example, on a sales order is 20 phones. There are only 5 phones in stock. By default (no auto-fill rules are defined) SIMMS generates a fill quantity of 5, using all available stock to fill the sales order.

However, if the auto-fill rule for fulfillment is set at 50% for sales orders, SIMMS generates a fill quantity of 0 (in other words do not fill this order). This is because the available stock (5) is less than 50% of the sales order quantity, and therefore it does not meet the auto-fill rule.

Defining your auto-fill rule is a two step process: first, you select your auto-fill method, and second, you define your auto-fill rule.

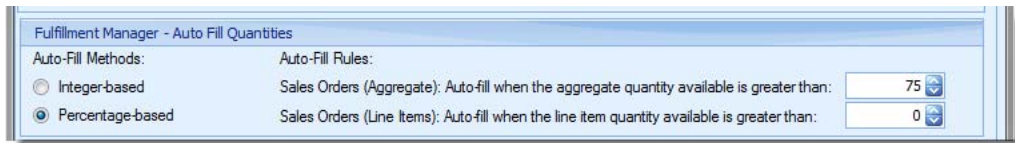


Figure 7: Auto-fill methods and rules used by the Fulfillment Manager.

## Select an Auto-Fill Method

You have a choice of two auto-fill methods:

1. Open the **Setup** menu, click **Global Settings**, and then click the **Sales** tab.
2. Under **Fulfillment Manager - Auto Fill Quantities**, choose one of the following auto-fill methods:
  - **Integer-based**  
SIMMS uses an integer value (for example, 0, 50, 80) for your auto-fill rule.
  - **Percentage-based**  
SIMMS uses a percentage (for example, 40%, 60%, 100%) for your auto-fill rule.

## Define Your Auto-Fill Rule

After you have selected your auto-fill method you define your auto-fill rule. There are two rules available:

- **Sales Orders (Aggregate)**  
For this rule all line items on a sales order must meet the auto-fill threshold otherwise SIMMS sets the fill quantity to zero (0) for all line items.  
That is, the sales order is not filled until all line items meet the auto-fill rule.
- **Sales Orders (Line Item)**  
For this rule any line item on a sales order that meets the auto-fill threshold is filled.  
This rule enables you to fill some items on a sales order but not others.

- ◆ On the **Automation** tab in **Global Settings**, do one of the following:
  - In the **Sales Orders (Aggregate)** box, type a number for your fill threshold.

SIMMS interprets this number as a absolute numeric value, or a percentage, depending on what you chose as your auto-fill method.

For example, if you chose Percentage-based as your auto-fill method, and set your Sales Orders (Aggregate) to 80%, SIMMS only enters a fill quantity greater than zero if the available stock to fill every line item on the sales order is greater than 80%.
  - In the **Sales Orders (Line Item)** box, type the number for your fill threshold.

SIMMS interprets this number as an absolute numeric value, or a percentage, depending on what you chose as your auto-fill method.

For example, if you chose Integer-based as your auto-fill method, and set your Sales Orders (Line Item) to 10, SIMMS only enter a fill quantity greater than zero if the available stock for a line item is greater than 10.
- 3. Click **Save**, and restart SIMMS to have your changes take effect.