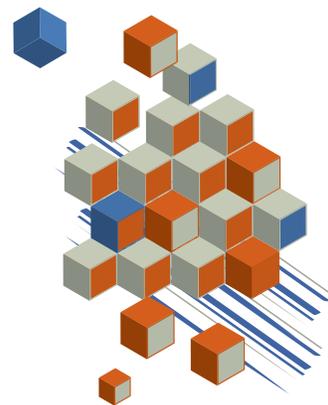




Sales Order Fulfillment

SIMMS Inventory Management Software 7.3

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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 on a sales order and the quantity of an item in stock.

Within the same window you can perform 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 required, or replenish your stock by purchasing more of the depleted item. Both tasks can be performed directly from the Fulfillment Manager.

You can perform many of the tasks required in the fulfillment process on more than one sales order at a time. This feature is called batch processing. Batch processing your sales orders is very useful if you have many sales orders to fill at once.

Filling Sales Orders

The Fulfillment Manager is designed as central location in which you can fill your sales orders. The first step in the fulfillment process is to list your sales orders in the Fulfillment Manager's grid.

List Sales Orders for Fulfillment

1. On the **Modules** menu, point to **Sales Orders**, and then click **Fulfillment Manager**.

The Fulfillment Manager window opens.

2. Under **Filter Options**, click **Query Data**.

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

***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.

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.

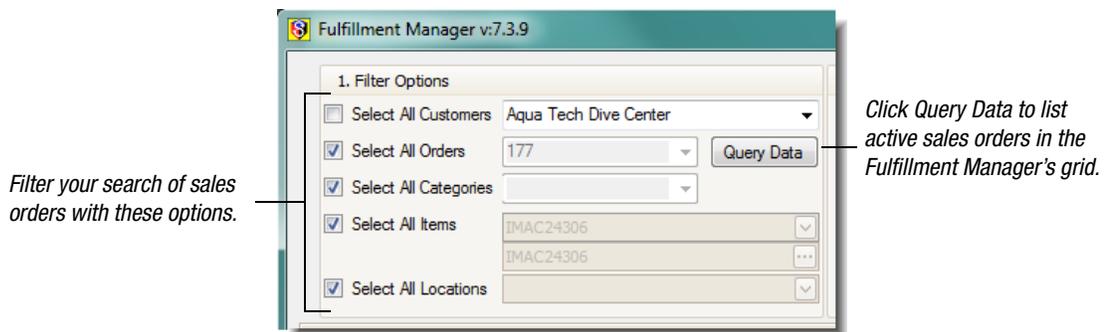


Figure 1: Filter Options

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 in the grid 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, and creating a transfer.

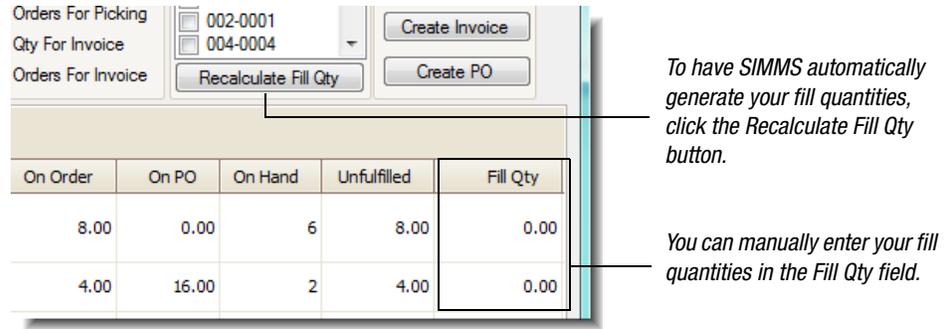


Figure 2: Entering fill quantities

- ◆ After listing your sales orders in the Fulfillment Manager’s grid, do one of the following:
 - To manually enter a fill quantity, in the **Fill Qty** field, type the fill quantity for an item in the grid.
 - To have SIMMS enter a fill quantity for all items where stock is available, click the **Recalculate Fill Qty** button.

The fill quantity that SIMMS enters uses all available stock from your item’s location on it’s sales order.

The Recalculation Report and a prompt to transfer stock may also appear.

This is because SIMMS automatically detects if there is insufficient stock to fill a sales order. If there is available stock in another location, SIMMS generates the Recalculation Report. This report lists those items with insufficient stock and the locations from which you can transfer stock to fill the sales order.

See “Transfer Inventory to Fill a Sales Order” on page 6.

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.

To print a pick list do the following:

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

The Pick Report opens. You can print, export, and e-mail this report.

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.

Note: To generate a purchase order for an item in the Fulfillment Manager, the item requires a default vendor.

To assign a default vendor for an item, go to **Inventory > Item Manager**. On the **Primary Info** tab, in the **Last/Pref. Vendor** list, select the default vendor for your item.

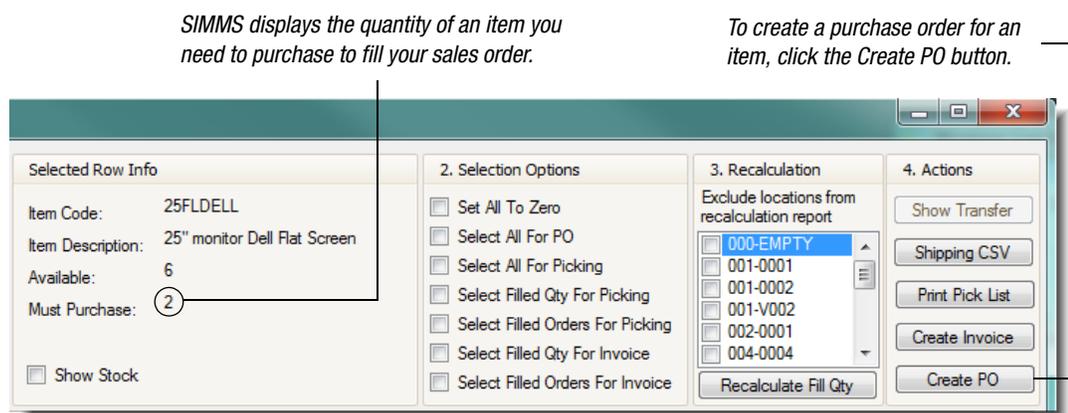


Figure 3: Create a purchase order from the Fulfillment Manager

To create a purchase order, do the following:

1. After listing your sales orders in the Fulfillment Manager's grid, 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.
The items for purchase are listed in the grid.
3. (Optional) In the **Qty** field, edit the quantity of the items you are purchasing.

By default, SIMMS only enters the quantity of your item required to fill your sales order.

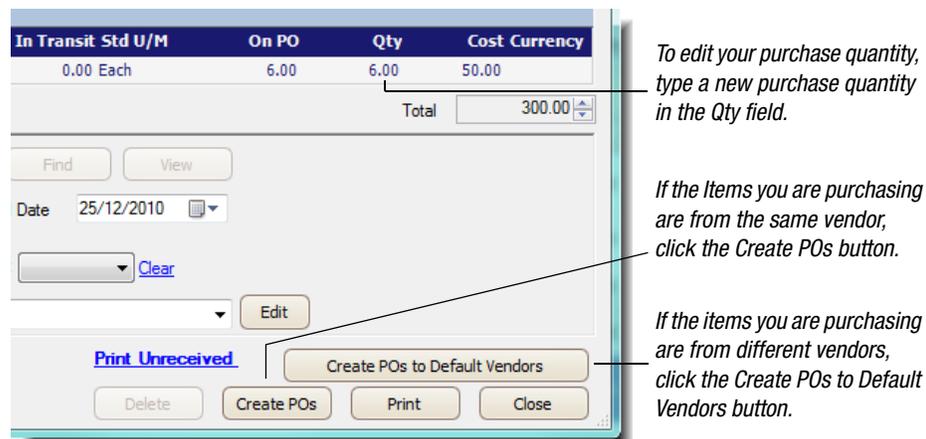


Figure 4: The Reorder Purchase Order window

4. Do one of the following:

- If all the items listed in the grid are purchased from the same vendor, in the **Document Number** text box, type a document number. In the **Vendor** list, select a vendor, and then click the **Create POs** button.

SIMMS generates a single purchase order for all your items.

- If any of the items listed in the grid are purchased from different vendors, click the **Create POs to Default Vendors** button.

SIMMS generates separate purchase orders for each default vendor.

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

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

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

Invoice a Sales Order

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

1. After listing your sales orders in the Fulfillment Manager's grid 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 an invoice. You can view and edit your invoice in the Transaction 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 on a sales order and there is available stock in another location.

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

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

This report lists those 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 5: 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  on the toolbar.

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  on the toolbar.

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.

To exclude a location from the Recalculation Report do the following:

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

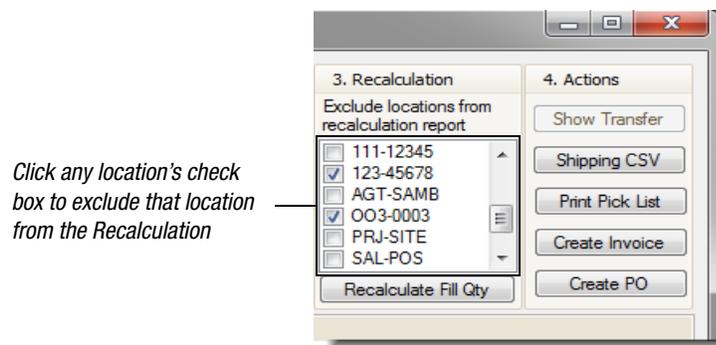


Figure 6: Exclude locations for the Recalculation Report

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

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

3. Complete your transfer.

Generate a Microsoft Excel CSV File with Shipping Addresses

You can generate a Microsoft Excel CSV file with the shipping information for your sales orders. This file is imported to a third party shipping program such as those supplied by FedEx and UPS. You use the shipping information imported to these programs to create shipping labels.

Note: In order for a shipping address to appear in the Microsoft Excel CSV file you must change the shipping address that SIMMS originally enters when creating your sales order with a shipping address selected from the Ship To Address list.

The shipping method you choose also appears in your Excel file.

Shipping Method: FedEx [Clear](#)
Shipping Account Number:

To have your shipping address appear in your Excel file, be certain to select the shipping address from the Ship To Address list.

Ship To Address: Mercy Hospital [Clear](#) [Edit](#)

Ship To Address:

Description:	Mercy Hospital
Additional	Boston Mercy Hospital
Address 1:	1443 State Street

Figure 7: Shipping Address on a sales order

To generate a Microsoft Excel CSV file with shipping addresses, do the following:

1. After listing your sales orders in the Fulfillment Manager's grid, in the **Invoice** field click the check box for the items in which you want their shipping address listed in the Excel file.
2. Click the **Shipping CSV** button.

Microsoft Excel opens with your shipping 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 Excel 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 very useful if you have many sales orders to process.

Batch Process Fulfillment Tasks

1. After listing your sales orders in the Fulfillment Manager's grid, under **Recalculation**, click the **Recalculate Fill Qty** button.

SIMMS enters the fill quantities for each item in the grid.

2. Under **Selection Options**, click an appropriate option.
See "Table 1: Selection Options".

Table 1: Selection Options

Select this option:	To do this:
Set All to Zero	<p>This option sets all your fill quantities to zero.</p> <p>Click Set All to Zero, and then click the Recalculate Fill Qty button.</p>
Select All for PO	<p>This option selects all items that require purchasing.</p> <p>Click Select All for PO, and then click the Create PO button.</p>
Select All For Picking	<p>This option selects all items for picking. This includes filled items and partially filled items.</p> <p>Click select All For Picking, and then click the Print Pick List button.</p>
Select Filled Qty For Picking	<p>This option selects all items for picking. This includes filled items and partially filled items.</p> <p>Click Select Filled Qty For Picking, and then click the Print Pick List button.</p>
Select Filled Orders for Picking	<p>This option selects all items on a sales order for picking but, only if the sales order is completely filled.</p> <p>Click Select Filled Orders for Picking, and then click the Print Pick List button.</p>
Select Filled Qty For Invoice	<p>This option selects all items for invoicing. This includes filled items and partially filled items.</p> <p>Click Select Filled Qty For Invoice, and then click the Create Invoice button.</p>

Table 1: Selection Options

Select this option:	To do this:
Select Filled Orders For Invoice	<p>This option selects all items on a sales order for invoicing but, only if the sales order is completely filled.</p> <p>Click Filled Orders For Invoice, and then click the Create Invoice button.</p>

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.

Auto-fill methods are either integer based or percentage based.

Auto-fill rules apply to either all items on a sales order, or to each line item.

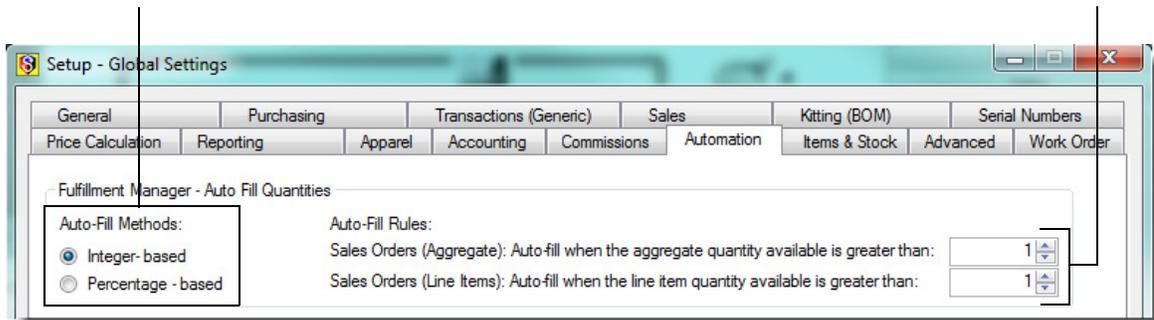


Figure 8: Auto-fill rules used by the Fulfillment Manager

Select an Auto-Fill Method

You have a choice of two 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.

To select an auto-fill method:

1. Click the **Setup** menu, point to **Settings**, click **Global Settings** and then click the **Automation** tab.
2. Chose one of the following auto-fill methods:
 - **Integer-based**
 - **Percentage-based**

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.

To define your auto-fill rules:

- ◆ 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.