

How to configure SOP Picking and Despatch

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Objective:

Different businesses undertake Picking and Despatch roles in different ways. Some small storerooms will employ people to undertake both picking and despatch; larger warehouses may employ different people to perform the picking role to those that pack and despatch.

Sage Line 50 provides the facility to both Allocate (i.e. reserve stock against a customer's order), and to Despatch it.

After you have created a Sales Order in Sage Line 50 you can optionally allocate stock to it. For example, if you have 10 stock items left in your stores and you receive two orders for 10 items each, you can manually allocate 5 items to each customer's order.

By design, the behaviour of the system can be configured to operate different ways. Furthermore, each user can perform a different role. You can have different operators performing different roles i.e. one person picking and another despatching.

Description:

There are 3 modes of operation:

1. **Allocate and Despatch (default)**

- i. The sales office creates Sales Orders in Sage Line 50 using SOP.
- ii. Stores people pick and despatch orders at the same time using a barcode terminal. Operators can either Despatch orders immediately, or temporarily hold stock, marking it as 'Allocated' on Sage Line 50 until it is ready for despatch.
- iii. The Delivery Note is printed from Terminal Controller and an Invoice created for the despatched goods.

The system makes the following adjustments when the user clicks 'Allocate':

- The 'Allocated' stock level is increased by the quantity of the despatch.

- The status of the SOP is updated to show part-allocated or fully-allocated.

Likewise, the following adjustments are made when the user clicks 'Despatch':

- The 'In Stock' level is decreased by the quantity of the despatch.
- The 'Allocated' stock level is decreased by the quantity of the despatch.
- A 'GO' (Goods-Out) adjustment is posted for the quantity of the despatch.
- The status of the SOP is updated to show part-complete or fully-complete.
- A new Invoice is created for the despatched items (see below).

2. Despatch orders which are pre-allocated

- i. The sales office creates Sales Orders in Sage Line 50 using SOP.
- ii. The sales office will allocate the relevant stock to each Order (in SOP) (i.e. show that the stock has been spoken for).
- iii. Stores people will pick and despatch only pre-allocated stock using a barcode terminal.
- iv. The Delivery Note is printed from the Barcode program and an Invoice created for the despatched goods.

The system makes the following adjustments when the user clicks 'Despatch':

- The 'In Stock' level is decreased by the quantity of the despatch.
- The 'Allocated' stock level is decreased by the quantity of the despatch.
- A 'GO' (Goods-Out) adjustment is posted for the quantity of the despatch.
- The status of the SOP is updated to show part complete or fully complete.
- A new Invoice is created for the despatched items (see below).

3. Allocate only

- i. The sales office creates Sales Orders in Sage Line 50 using SOP.
- ii. Stores people pick each order, but do not yet despatch the goods. The picked items are marked as 'Allocated Stock' on Sage.
- iii. No delivery note is printed and no invoice created.

The system makes the following adjustments when the user clicks 'Save':

- The 'Allocated' stock level is increased by the quantity of the despatch.
- The status of the SOP is updated to show part allocated or fully allocated.

With option 3 (Allocate only) your orders can be despatched at a later time in one of two ways:

- a. either despatched from Sage Line 50 using SOP.
- b. or despatched from a second barcode terminal configured as Function 2 above.

Printing Delivery Notes and Creating Invoices

The printing of Delivery Notes is configured through a setting for the User account. This means users working in different locations can print to their own local printer.

How to set the Printer

Start *Barcode Admin*.

Click the '**Settings**' icon

Select the '**Users**' tab

Type the full network path to the required printer

e.g. `\\Servername\Printername`

How to create Invoices from Despatched Sales Orders

The system can be configured to automatically create a Customer Invoice from despatched Sales Order. This facility is enabled or disabled through a setting in the '**Settings**' tab within Barcode Admin.

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