Ordering By Document

Module Guide: Ordering by Document (Stock Allocation)

Module Location

Inventory > Item/Service > Ordering by Document

Module Objective

The **Ordering by Document** module is used to perform stock allocation or reservation from available warehouse stock to fulfill the needs of an existing source document, specifically a **Sales Order**. This is a critical step in the **order fulfillment** process to ensure that goods ordered by a customer are truly "locked in" and ready for shipment

1. Main View (Document List)

The main page of this module displays a list of source documents (e.g., Sales Orders) whose items you can allocate from stock.

View and Usage Explanation

- **Filter**: Use the **Document Type** filter to select the type of document, generally **Sales Order**.
- **Document List**: The system displays a list of all relevant Sales Orders.

- **How to Use**: Find the document (Sales Order) you want to fulfill, then click on that row to open its item details.

2. Steps to Allocate Stock

Step 1: Open the Document Details

After selecting a document from the list, you will see a detail page that breaks down the items within that order.

Step 2: Analyze Need vs. Availability

Pay attention to the following columns to make an allocation decision:

- **Remaining Quantity**: The quantity that is still needed by this sales order.
- **Available Quantity**: The free stock quantity that is currently in the warehouse.

Step 3: Enter the Quantity to be Ordered/Allocated (Important!)

In the **Order Quantity** input column on the far right, enter the quantity you want to allocate from the available stock for this order. You cannot enter a quantity larger than the **Available Quantity**.

Step 4: Perform the Ordering/Allocation

Click the **[Order]** button at the bottom of the page. This action will officially reserve that stock for this Sales Order, reducing it from the free stock.

Workflow & Integrated Business Process

- This module is the key step between the **Sales Order** and the **Delivery Order**.

- After the stock has been successfully allocated here, the warehouse team can proceed with the shipping process because the goods have been confirmed as available and are tied to a specific order.

Tips & Important Notes

- Use this module to systematically manage customer order fulfillment, especially if stock is limited and you need to prioritize which orders to fulfill first.

- The "Order" action will reduce the **Available Quantity** in the warehouse.

Revision #1
Created 14 October 2025 14:32:54 by Sayu
Updated 14 October 2025 14:35:00 by Sayu