

SCHEDULED ORDERS

Definition

Scheduled customer orders occur when a customer places an order, but they do not want it delivered until a specified date in the future. Scheduled purchase orders occur when your company places a purchase order, but does not want it shipped until a specified date in the future.

The date range that determines whether an order is considered a current order or a delayed order is defined by branch in Branch File Maintenance on the S/M menu.

24. # OF DAYS BEFORE TICKET BECOMES A DELAYED

For example, if this field contains '90', then any orders with a requested delivery date beyond 90 days into the future are considered delayed orders. Orders entered with requested delivery dates within 90 days are considered current, but the pick ticket will not be selected for printing until a specified # of days before the delivery is due. That # of days is also defined by branch in Branch File Maintenance.

23. # OF DAYS BEFORE DUE THAT PICK TICKET PRINTS

Entering Scheduled Customer Orders

When entering a scheduled order, the operator should enter the Requested Delivery Date on the order header screen and then each of the line items on the order will have this delivery date. If the operator wishes to commit the inventory to the order at the time that it is entered, then they should print a pick ticket. If they do not wish to commit the inventory until it is due to be delivered to the customer, then they should not print the ticket. The system will automatically select the ticket for printing based upon the number of days defined in the branch file, and commit the inventory at that time. When the ticket is printed it shows the date requested below the ship-to address.

The system handles orders differently depending upon whether the Requested Delivery Date on the header screen is changed from ASAP to a specified date. If it is not changed as described above, the operator still has the option to enter a requested delivery date for each of the line items on the order. In this case the items are committed to the order when the pick ticket is printed depending upon the stock availability, and the requested delivery date is printed for each line item.

Note: The recommended way to enter scheduled orders is to fill in the Requested Delivery Date on the order header screen and to entered separate orders for each date.

Purchasing

For purchasing purposes, the delayed orders should not be brought into stock until they are within the delayed limit. The “delayed limit” is calculated each day based upon the current date and the number of days defined in the branch file as described above. When scheduled orders are entered, if they are dated beyond the “delayed limit” then they are not included in the backordered quantity on the purchasing reports. In Stock Item Inquiry, the “quantity due to customers” shows a plus sign “+” to indicate that there are orders beyond the delayed limit.

As part of the End-of-Day procedures, the system checks any scheduled orders to see if they should be moved from delayed to current. When this occurs, they appear in the “quantity due to customers” and appear on the purchasing reports, such as the Replenishment Action Report and Build a P.O.

If there is insufficient stock and the items must be ordered, the lines on the purchase order can be tied to the customer order. If they are tied to the order, then the purchase order shows the requested delivery date. When they are received the system checks the “# of days before the pick ticket should be printed” to see if it should be printed. If not, then the order information prints on the P.O. Receiving Report only, which shows the requested delivery date.

Example

Branch File:

23. # OF DAYS BEFORE DUE THAT PICK TICKET PRINTS: 8

24. # OF DAYS BEFORE TICKET BECOMES A DELAYED: 60

Current date: 06/15/2013

Order entered with requested delivery date of 09/20/2013

Order is delayed and is not included in “quantity due to customers”

On 07/21/13 the order status changes to current and quantity is included in “quantity due to customers” for each item.

On 09/12/2013 the pick ticket is printed and it shows that the customer requested delivery on 09/20/2013.