

# Stock Allocation

IF YOU AMEND A MTO PRODUCT AFTER IT HAS BEEN ORDERED, IT WILL BREAK FUTURE ALLOCATIONS

## Stock Allocation

Stock Allocation is the process by which a unit of Stock is added to a Sales Order. This process can be manual or automated.

Stock Allocation is powered by Store Stock and Purchase Orders.

if automated, IXO Commerce will allocate stock based on proximity and age. It will prioritise stock from the selling Store (e.g. the Store in which the Sales Order was created), and will always allocate the oldest units first.

if there is no stock available in the selling store, IXO Commerce will allocate stock from other Stores, if available. stock will be allocated from the Location with the most available stock. other settings at Store and Location level may override that.

if there is not enough physical stock in the business, IXO Commerce will attempt to allocate stock from open purchase orders, if there is free stock on a purchase order

if there is insufficient stock available (either in the business, or in open purchase orders), then the order will fall into 'unallocated' and manual intervention will be required

at minimum, the auto allocation process will run hourly

manual assignment can either be done within the pos, or from the sales order edit screen. function is similar on both, but in the pos, it is not possible to split stock, or to create new purchase orders

to allocate a line within the pos, the user must click or tap on the line item. this will open the edit item pop up, and stock may be allocated using the drop down

to allocate a line within the sales order edit screen, the user simply uses the drop down against the relevant sales order line

a user may either

- leave the line as 'not allocated' (this will trigger automated allocation processes)
- mark the line as 'do not allocate' (this will prevent automated allocation processes)
- allocate existing stock from a location by choosing a location
  - if there is not enough stock in the location for a line, e.g. 5 are needed and location only has 2, then a splitstock button will appear. this will allow the user to split the line, so that the first part is fulfilled from location a, and the second part can be allocated separately
- alternatively, a user may create a new purchase order using the tick box to the right of the drop down. that will create a new back to back purchase order linked to this sales order line
  - new purchase orders may also be created from the required orders screen.

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## Overview

Stock Allocation is the process by which a unit of stock is added to a Sales Order. This process can be manual or automated.

Stock Allocation is powered by Store Stock and Purchase Orders.

## Automated Stock Allocation

If automated, IXO Commerce will allocate stock based on proximity and age. It will prioritize stock from the selling Store (e.g., the Store in which the Sales Order was created), and will always allocate the oldest units first.

If there is no stock available in the selling store, IXO Commerce will allocate stock from other stores, if available. Stock will be allocated from the location with the most available stock, although other settings at the Store and Location level may override this.

If there is not enough physical stock in the business, IXO Commerce will attempt to allocate stock from open purchase orders, if there is free stock on a purchase order.

If there is insufficient stock available (either in the business or in open purchase orders), then the order will fall into 'unallocated' and manual intervention will be required.

At minimum, the auto-allocation process will run hourly.

## Manual Stock Allocation

Manual assignment can either be done within the POS or from the Sales Order edit screen. The function is similar in both, but in the POS, it is not possible to split stock or to create new purchase orders.

### POS Allocation

To allocate a line within the POS, the user must click or tap on the line item. This will open the edit item pop-up, and stock may be allocated using the drop-down.

### Sales Order Edit Screen Allocation

To allocate a line within the Sales Order edit screen, the user simply uses the drop-down against the relevant Sales Order line.

## Allocation Options

A user may either:

- Leave the line as 'not allocated' (this will trigger automated allocation processes)
- Mark the line as 'do not allocate' (this will prevent automated allocation processes)
- Allocate existing stock from a location by choosing a location
  - If there is not enough stock in the location for a line, e.g., 5 are needed and location A only has 2, then a split stock button will appear. This will allow the user to split the line, so that the first part is fulfilled from location A, and the second part can be allocated separately
  - Create a new purchase order using the tick box to the right of the drop-down. That will create a new back-to-back purchase order linked to this Sales Order line.
  - New purchase orders may also be created from the required orders screen
- Stock Reservation prevents automated processes from over-allocating a unit of stock

However, it is possible for a human to override this by manually selecting already reserved stock during Stock Allocation.

## FAQs

# How does automated Stock Allocation work?

IXO Commerce allocates stock based on proximity and age. It prioritizes stock from the selling Store and allocates the oldest units first.

## Can I rely solely on automation?

No, if there is insufficient stock available, the order will fall into 'unallocated' and manual intervention will be required.

## Is it possible to over allocate?

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