Using Sales Allocations

Sales Allocations are designed to allocate a quantity of product at a specific price. Optionally, specific quantities can be assigned to selected sales staff members, so a limited supply of product can be tightly controlled.

Adding a Sales Allocation

To create a Sales Allocation, go to *Hub / Setup / Sales Allocations*, and select **Add**.

Be sure to complete the required fields, including *Product*, *Quantity*, *Selling Price*, *Booking Start Date*, and *Booking Expiration Date*. The *Status* defaults to *Open* when adding a Sales Allocation.

Select **Save**. If a Sales Allocation needs to be discontinued from use, change the *Status* to *Closed*.

A Sales Allocation can be entered for a single product and is valid for the same Product ID in other Locations when the Departments have matching Categories. When a Sales Order is created for an allocated product, the *Allocation #* column is highlighted in red in the *Product* grid. Double-click that cell and select the appropriate Allocation for that product. The Allocation number will appear in the *Allocation #* column.

If the customer selected on the Sales Order does not have one of the salespeople assigned to the account and the order is for an allocated product, no Allocation can be chosen. To have the Sales Order applied to the Allocation, assign an appropriate Salesperson to the customer by selecting **Additional Info** and choosing the appropriate Salesperson from the drop-down.

Editing a Sales Allocation

Sales Allocations cannot be edited after they have been used on a Sales Order with the exception of the *Status*. For example, the Sales Allocation *Status* can be set to *Closed*.

Deleting a Sales Allocation

Select the Sales Allocation to be deleted, and choose **Delete**. Sales Allocations cannot be deleted if they are included with a product on an existing Sales Order.

Sales Allocation Status

Check the *Status* of a Sales Allocation at *Hub / Setup / Sales Allocations*. Select the Allocation then the **Status** button. The *Status* shows the current state of the allocation.

Sales Orders entered prior to the Sales Allocation being entered will not be automatically assigned to any existing Sales Allocations. The Sales Orders can be edited and the allocated items can be assigned to the Sales Allocation by editing the *Product* grid. The Sales Allocation price will be set on those items when the Allocation is chosen.

Allocation Quantity

The Allocation *Quantity* can be exceeded. If the quantity of product on a Sales Order exceeds the quantity on the Sales Allocation, the Sales Order is saved normally and the *Status* of the Sales Allocation goes negative. The entire quantity of allocated product on the Sales Order is set to the price on its Sales Allocation.

Sales Allocations for Mobile Sales

See the Sales Allocations for Mobile Sales document for more information on sales allocations regarding Mobile Sales.