

Simple Fulfillment (No Bundle)

A simple fulfillment where all products are 'buy' type and do not need to be assembled.

**These instructions will assume you have all the inventory items necessary to complete this order at the assembly warehouse.*

1. Create Fulfillment
 - a. Select 'Contains Bundles' record type
 - b. Account – The account his fulfillment order is for
 - c. Location – The location you would like to stage of reserve the inventory required to complete this fulfillment order. These are typically categorized as WIP locations.
2. Add Product Required from related list
 - a. Product Required – On product, the Make or Buy picklist is set to Buy
 - b. Quantity Required – As many as you need for this fulfillment order
3. Look at the product required you just created, notice how there is an available quantity field. This is telling you how many of these inventory items there are in the system available to use for this fulfillment.
**** If the available quantity is greater than or equal to the quantity required, skip ahead to step 6. ****
4. Add Inventory Request from the related list
 - a. Status – Submitted
 - b. Shipment Type – Please choose one
 - c. Needed By – The latest date you can receive the item
 - d. Destination Location – Main Warehouse
 - e. Click the next button
 - f. Select the checkbox to the left of the product name
 - g. Click the next button
 - h. Select the checkbox to the left of the product name
 - i. Request Quantity- The quantity needed to complete the fulfillment
 - j. Click the save button
5. Once the items requested are added to inventory, you will be able to continue with the fulfillment order.
6. Add Transfer record from related list
 - a. Product – One of the products required on this fulfillment order
 - b. Quantity Sent – This should be the quantity you need
 - c. Source Product Item – The inventory item you would like to transfer. Its location should have a location type of 'Warehouse'
 - d. Received Checkbox - Checked
 - e. Quantity Received – This should be the quantity you need
 - f. Destination Location – Where will we be holding this item to reserve it. This should be the same as the WIP location on the fulfillment order.
 - g. Status – Complete
7. Add Inventory Consumed record from related list
 - a. Product – The product you are consuming, this should match an inventory transfer
 - b. Inventory Item – The Inventory item you are consuming, this should match an inventory transfer
8. Repeat steps 4 – 6 for each product required
9. Click the create asset button
 - a. Select the items you would like to relate to the asset
 - b. Click the next button
 - c. Name – Asset Name
 - d. Status – Installed
 - e. Installation Date – The date the asset was installed at the new location

Fulfillment (Contains Bundle)

A fulfillment where at least one product is 'make' type.

**These instructions will assume you have all the inventory items necessary to complete this order at the assembly warehouse.*

1. Create Fulfillment (Select 'Contains Bundles' record type)
 - a. Account – The account this fulfillment order is for
 - b. Location – The location you would like to stage or reserve the inventory required to complete this fulfillment order. These are typically categorized as WIP locations.
2. Add Product Required from related list
 - a. Product Required – On product, the Make or Buy picklist is set to Make
 - b. Quantity Required – As many as you need for this fulfillment order
3. Look at the product required you just created, notice how there is an available quantity field. This is telling you how many of these inventory items there are in the system available to use for this fulfillment. In this scenario, we need that available quantity to be zero.
4. Click the WIP Transfer Button – This process checks to see if we have this bundle preassembled in inventory. If we have it in inventory, we pull that and it will pull from that first. If we do not have any of these items preassembled,
 - a. Items highlighted green, we have in inventory
 - b. Items listed in red, we do not have in inventory
 - c. If we have the item