

Windfall version 5.10 introduces a new feature called ‘grouping’. For those familiar with the Windfall Classic ‘Roll-up Value’ feature, grouping works in much the same way.

## Introduction

Grouping is a way to sort and categorize inventory in Windfall. A group can be made up of any number of Windfall prompts and custom prompts. If any inventory items have the exact same data in all of the grouping fields, they will be sorted together as part of the same group.

When viewing inventory by grouping, items are sorted into different groups based on the criteria you have configured for the customer. For example, if ‘Article Number’ and ‘Description’ were the only fields that you have selected to group by, any items with identical information in those two fields will be grouped together. Any other field can have any value in it, but it will not affect whether it is part of the group. However, if you were also to add ‘comments’ to the group, the values in that field would also have to be identical to be part of the same group. Here is an example.

Item number	Article Number	Description	Comments	Color
Item A	gv132	Glass Vase	Intact	Green
Item B	gv132	Glass Vase	Intact	Blue
Item C	gv132	Glass Vase	BROKEN	Yellow

*fig. 1*

In the example above, all of these items share information in the ‘Article Number’ and ‘Description’ fields, and would be grouped together if those two categories were the only ones selected. However, since ‘Comments’ is also part of this group, they would be broken into two groups with items ‘A’ and ‘B’ in one group, and item ‘C’ in another group. Even though the data in the ‘Color’ field varies across these items, it is not part of the grouping criteria and does not affect which group the items belong to.

If 'Color' was a part of the grouping criteria, then all of these items would be in distinct groups. Likewise, if 'Comments' was *not* part of the grouping criteria, then all of these items would be in the same group as the data in the 'Article Number' and 'Description' fields match exactly across all three items.

In windfall, these two group would look like this:

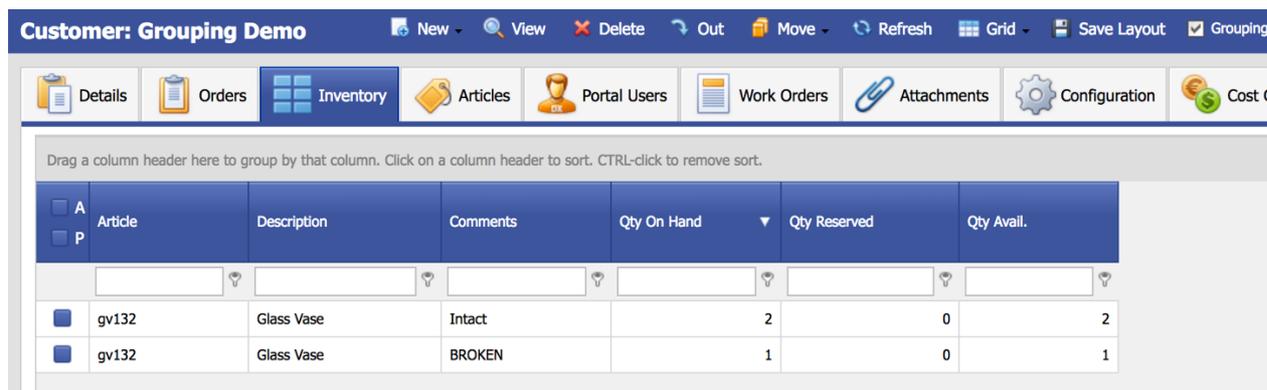
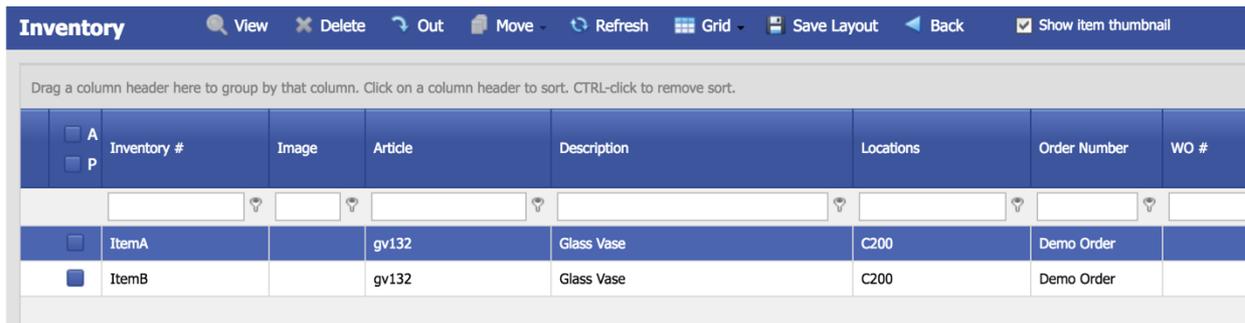


fig. 2

From this screen, you cannot see the items themselves, only the group. The 'Quantity On Hand' column indicates how many items are in this group. The grid on this page will only display columns that are a part of the grouping criteria.

The first group on the screen contains items A and B. The second group contains item C. If 'Comments' was not a part of the grouping criteria, then the comments column would not show on this screen, and all three items would be grouped together since the article and description information all matches. Note that 'Color' is not visible as it is not part of the grouping criteria.

To view the inventory items that are a part of a group, double-click the group (alternately, highlight the group and click the 'view' button at the top of the screen).

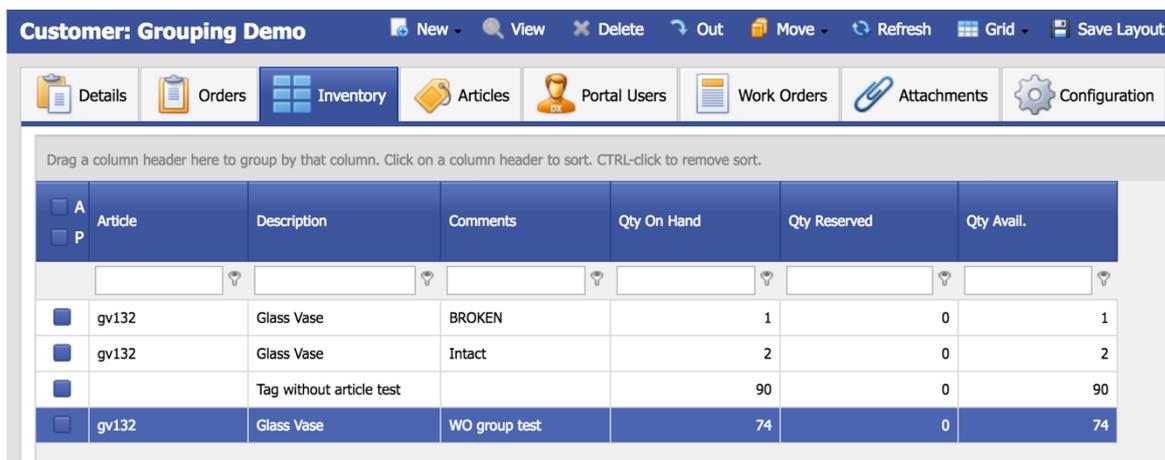


<input type="checkbox"/> A <input type="checkbox"/> P	Inventory #	Image	Article	Description	Locations	Order Number	WO #
<input type="checkbox"/>	ItemA		gv132	Glass Vase	C200	Demo Order	
<input checked="" type="checkbox"/>	ItemB		gv132	Glass Vase	C200	Demo Order	

fig. 3

The grouped inventory will load in a new page. This page will behave exactly like the customer inventory page. Inventory can be viewed, edited, and added to work orders.

Here is another example.



<input type="checkbox"/> A <input type="checkbox"/> P	Article	Description	Comments	Qty On Hand	Qty Reserved	Qty Avail.
<input checked="" type="checkbox"/>	gv132	Glass Vase	BROKEN	1	0	1
<input checked="" type="checkbox"/>	gv132	Glass Vase	Intact	2	0	2
<input checked="" type="checkbox"/>		Tag without article test		90	0	90
<input type="checkbox"/>	gv132	Glass Vase	WO group test	74	0	74

fig. 4

There are now four groups. Notice the third of the four groups has no article associated with it. Because Article is part of the grouping criteria, all items that have no data in the article field are grouped together (if all other grouping criteria matches). Put another way, two items that have no data in a grouping field match, just the same as if those items had matching data in that field. Below is the table from before, expanded with new information

Item number	Article Number	Description	Comments	Color
Item A	gv132	Glass Vase	Intact	Green
Item B	gv132	Glass Vase	Intact	Blue
Item C	gv132	Glass Vase	BROKEN	Yellow
Item D	gv132	Glass Vase	WO group test	N/A
Item E		Tag without article test		
Item F		Tag without article test		

fig. 5

In this table, there are now two more rows. The first two items are grouped together because all of the data in the grouping fields matches exactly. The next two items (item C and Item D) are each in their own group, as the data in those fields does not match exactly. Item E and Item F would be grouped together as they both have no data (which is treated as matching data) in 'Article Number' and 'Comments', and have matching data in 'Description'.

This is a simplified example, but these rules will apply no matter how much inventory or how many grouping criteria you have. If you had twenty grouping criteria, no two pieces of inventory would be grouped together unless the data (including blank fields) matched exactly in all twenty of those fields for both items.

This works very much like 'Roll up Values' in Windfall classic, but in Windfall 5.10 you are not limited to the default fields, and can include or exclude any Windfall or custom prompts except for the defaults of 'Article Number' and 'Description'

## Set Up Grouping Criteria

To set up grouping for a customer, navigate to that customer in Windfall.

1. Select the 'Configuration' tab for the customer
2. Select the 'Grouping' tab
3. 'Article Number' and 'Description' will be selected by default. These are required, and cannot be changed. Select the box next to any other fields you want to add to the group.
4. Click 'save'. The group will be added to the 'history' tab on the right side of the page
5. Any of the group histories can be restored from the dropdown menu on the right.

## Grouping Work Orders

Grouping work orders replace article-only work order in Windfall 5.10.

There are two ways to create a grouping work order. The first way is to navigate to the customer's work order screen, and click 'New', then hover over 'Outbound' or 'Move'. Both types of work order now have 'Grouping' as a work order type. Select 'Grouping' to create a new outbound or move grouping work order.



fig. 6

Windfall will navigate you to the newly created work order.

The second way to navigate to the inventory screen, view the inventory by grouping, check the box next to the group or groups that you want to add to the work order, and then add to a new or existing work order.

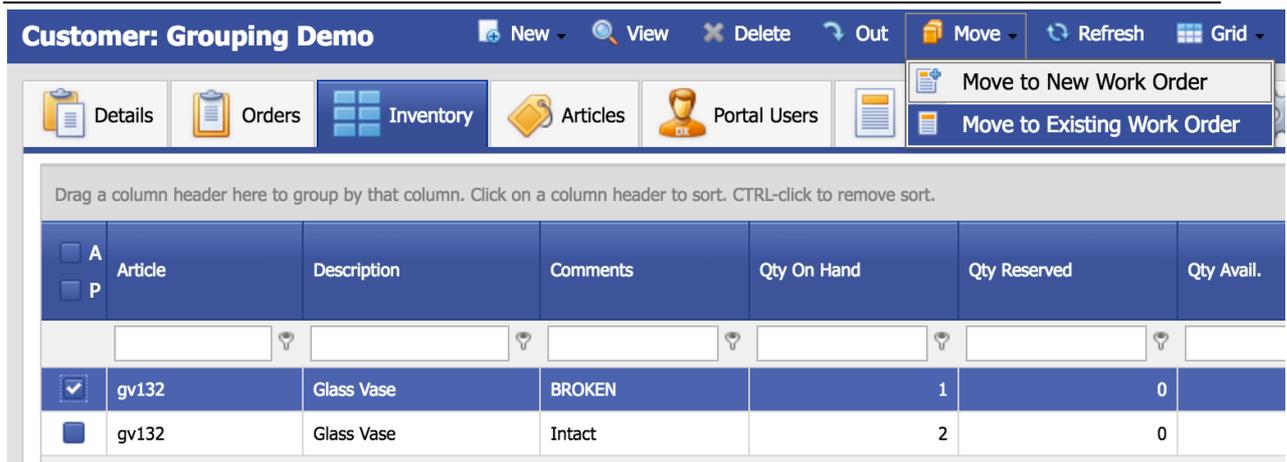


fig. 7

Windfall will load the newly created work order, and the selected line items will be added to it.

At this point, the work order is saved, but not submitted. Line items can still be added and changed. When you are ready to begin processing the work order, click 'Submit'.

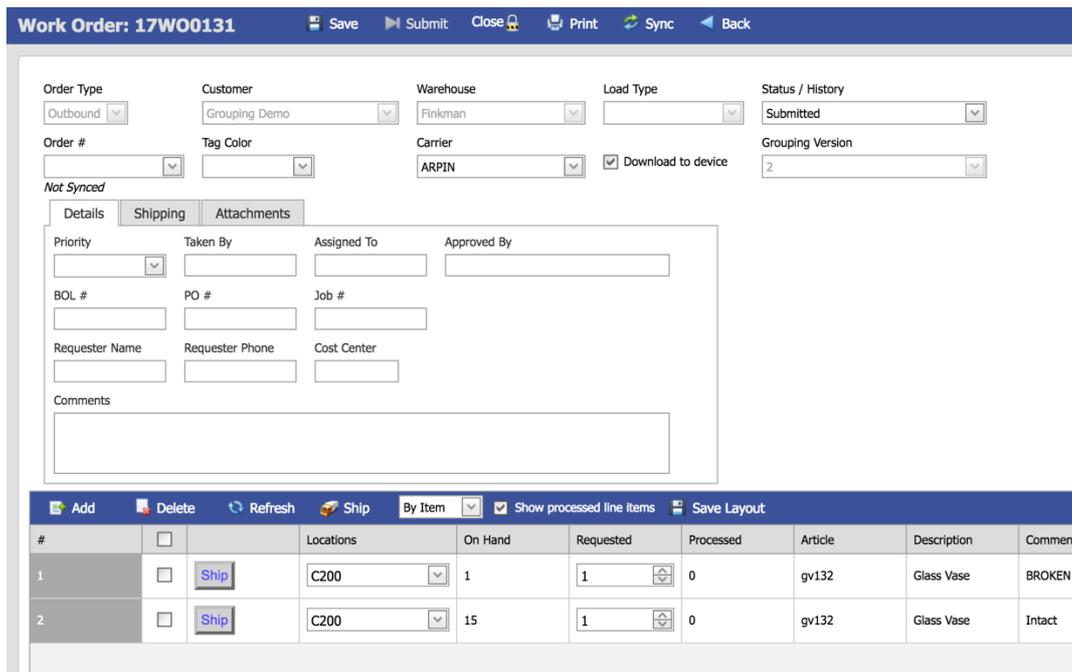


fig. 8

This is the work order from before after being submitted. The groups are what is visible on the work order, not the items the groups contain. In order to see the contents of the group, click 'Ship' next to one of the groups.

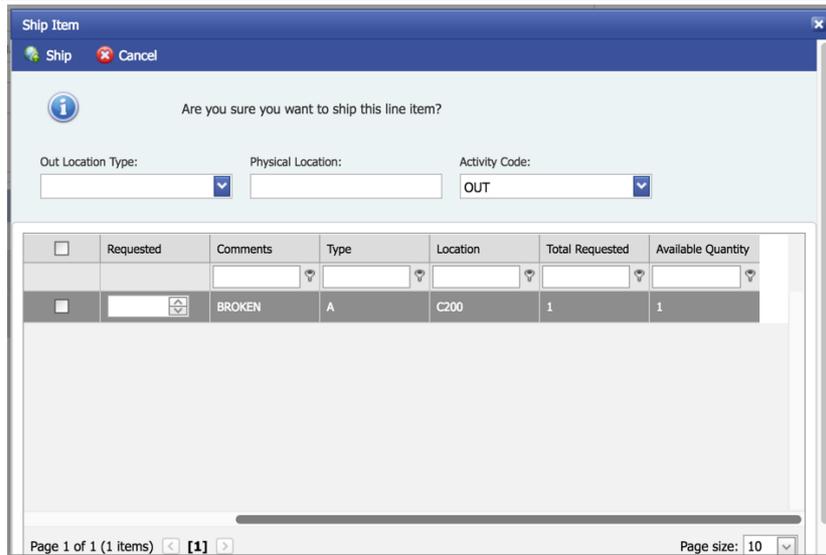


fig. 9

The first group only contains one item, and that item only has a quantity of '1'. It can be shipped just like any other work order.

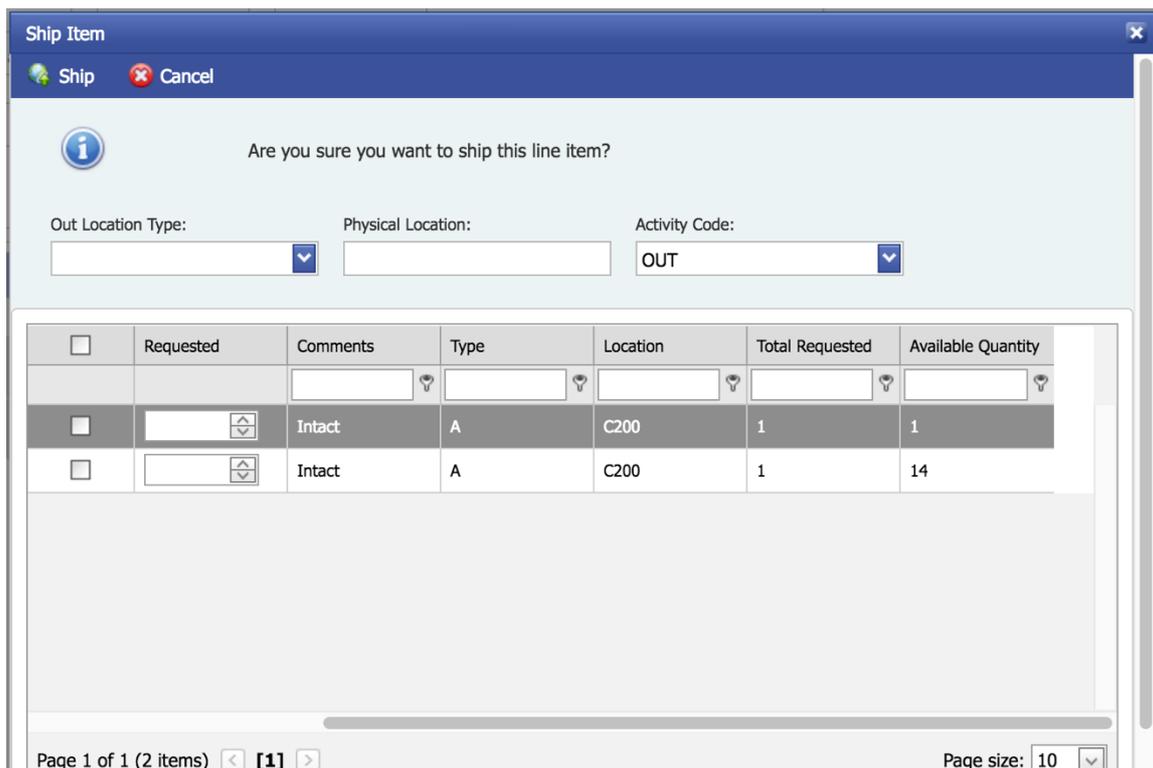


fig. 10

The second group contains two tags, one of which has a quantity of 14. The total requested is still just 1 item from this group. To fulfill the order, the first item can be used, or a partial quantity (1 of the 14 available) of the second item can be used. Set

the location details, check the boxes next to the items to ship, set the quantity, then click 'ship' at the top of the window.

When the work order has been processed, it can be closed.

If one of the items in a group is already reserved on another work order, it will not show as an available item on the grouping work order. If a *partial quantity* of an item is reserved on another work order, only the remaining quantity will be available on the grouping work order.