

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
<mark>ltem A</mark>	gv132	<mark>Glass Vase</mark>	<mark>Intact</mark>	Green
<mark>ltem B</mark>	<mark>gv132</mark>	<mark>Glass Vase</mark>	Intact	Blue
ltem C	gv132	<mark>Glass Vase</mark>	BROKEN	Yellow

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.

X Delete **Customer: Grouping Demo** 🐻 New 🛛 🍭 View 🥆 Out 🧃 Move -🗘 Refresh 📰 Grid -Save Layout Groupin Details 💆 Portal Users Attachments Work Orders Configuration Orders Inventory 🔊 Articles S Cost C Drag a column Click on a column he to sort. CTRL-click to remove sort Oty On Hand Otv Avail Article Description Comments Qty Reserved 9 9 Ŷ Ÿ 9 2 2 0 av132 Glass Vase Intact gv132 BROKEN 1 0 1 Glass Vase

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).



Inventory	🔍 View	n 💥 Delete	e 🥆 Out <i> 🗍</i> Move	- 🗘 Refresh 🛛 🏭 Grid -	💾 Save Layout 🛛 ┥ Back	V	Show item thumbna	ail			
Drag a column hea	Drag a column header here to group by that column. Click on a column header to sort. CTRL-click to remove sort.										
A P	A Inventory # Image Article Description Locations Order Number WO #										
	Ŷ	9		©)	♥	Ŷ	() V				
ItemA			gv132	Glass Vase	C200		Demo Order				
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.

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De De	etails 📋 C	rders	Inventory		Articles	orta	Il Users Work	Orders	🖉 Attachm	ients	Configuration
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AP	Article		Description		Comments		Qty On Hand	Qty Res	erved	Qty Avail.	
		٣		9		7	Ŷ		Ŷ		Ŷ
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			Tag without article test				90		0		90
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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	<mark>Article Number</mark>	Description	<mark>Comments</mark>	Color
<mark>ltem A</mark>	gv132	<mark>Glass Vase</mark>	Intact	Green
<mark>ltem B</mark>	gv132	<mark>Glass Vase</mark>	<mark>Intact</mark>	Blue
<mark>ltem C</mark>	gv132	<mark>Glass Vase</mark>	BROKEN	Yellow
ltem D	gv132	<mark>Glass Vase</mark>	WO group test	N/A
ltem E		Tag without article test		
ltem 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.

Customer:	Grouping D	emo	🐻 New	🔍 View	- 🔀 De	elete 🗘 Re	efresh 📰 Grid	
(r		Inbo	und			-	
Details	Orders	Inventor	Outb	ound	Ву	Inventory	Work Orders	(
-			Move	e I	Ву	Grouping		
Drag a column	header here to gro	oup by that column	Click on a co	olumn neade	TO SOIL CI	KE-CIICK to Territ	ov e sort.	

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.



Windfall NG - Grouping

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(Move to New Work Order												
	etails Orders		Articles Articles	al Users	Move to Existing Work	c Order							
Drag a	column header here to g	roup by that column. Click on a	a column header to sort. Ci	TRL-click to remove sort.									
	Article	Description	Comments	Qty On Hand	Qty Reserved	Qty Avail.							
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	gv132	Glass Vase	BROKEN		0								
	gv132	Glass Vase	Intact		2 0								
			fig. 7										

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'.

Order Type Customer Warehouse Load Type Status / History Outbound Grouping Demo Finkman Image: Submitted Image: Submitted Order # Tag Color Carrier Grouping Version ARPIN Image: Download to device 2 Portry Taken By Assigned To Approved By Priority Taken By Assigned To Approved By Image: Deteit Phone Cost Center Comments Comments Plant Image: Deteit Phone Cost Center Image: Deteit Phone Image: Deteit Phone Plant Image: Deteit Phone Plant Image: Deteit Phone Image: Deteit Phone Plant Image: Deteit Phone Plant Plant Plant Plant Plant Plant Plant	ork Order: 17W	00131	💾 Save 🕨 Submi	t Close 🔒 📮 P	rint 🧳 Sync	Back			
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Priority Taken By Assigned To Approved By BOL # PO # Job # BOL # PO # Job # BOL # PO # Job # Comments Cost Center Comments Ship Ship System ✓ Ship C200 ✓ 1 1 0 gy132 Sins Vase	Not Synced	Attachments							
S Add ■ Delete ♥ Refresh Image: Ship By Item Image: Ship Ship By Item Image: Ship Ship Ship Description Image: Ship Image: Coord of the ship Imag	Priority BOL # Requester Name Comments	Taken By	Assigned To	Approved By					
Ship C200 I I O gv132 Glass Vase Ship C200 I </td <td>📑 Add 🛛 🔓 De</td> <td>lete 🗘 Refresh</td> <td>Ship By Item</td> <td>On Hand</td> <td>ssed line items 📑</td> <td>Save Layout</td> <td>Article</td> <td>Description</td> <td>Con</td>	📑 Add 🛛 🔓 De	lete 🗘 Refresh	Ship By Item	On Hand	ssed line items 📑	Save Layout	Article	Description	Con
		Ship	C200 ~] 1	1	0	gv132	Glass Vase	BRG
		Ship	C200 ~	15	1	0	gv132	Glass Vase	Inta

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.



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1	Ar	re you sure you war	nt to ship this li	ne iterr	1?				
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	÷	BROKEN			C200		1		

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.

Ship Item								×		
🍓 Ship 🛛	Cancel									
Í	Are you sure you want to ship this line item?									
Out Locatio	on Type:	Physical Loca	ation:		Activity Code:					
		~			OUT	~				
	Requested	Comments	Туре	Loca	ation	Total Requested	Available Quantity			
		9	9		Ŷ	Ŷ	9			
		Intact	A	C20	0	1	1			
	< >	Intact	A	C20	0	1	14			
				_						
Page 1 of 1	(2 items) < [1]	>					Page size: 10	~		

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.