

iQ Change Request Form

Change Information

**Please replace all text in the right-hand columns. Otherwise your request will be   
invalid and it will be pushed back to you for additional information.**

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| --- | --- |
| **Title** | **Tile Products - Gaps in the handling of different tile units** |
| **Date** | **26/04/2022** |
| **Customer Name** | **All customers using Tile products** |
| **Contact Name** |  |
| **Channel Partner** | **Ireland PMO** |
| **Submitting Consultant** | **Mark Bonnici** |
| **Freshdesk Ref / Teamwork Ref** |  |
| **Version Number** |  |
| **Job Number** |  |
| **Link/Path to Data and Plugins** |  |
| **User Acceptance Testing Date** |  |
| **PCR Approved by** | **Internal** |

Business Case/Requirement Details

In the tile industry, tile products are usually measured in square metres (sqm) as opposed to number of tiles. The reason is that tiles and cartons are not a standard unit of measure since they vary according to the tile size. When builders order tiles, they measure the area which they need to cover, and the number of tiles or cartons is then calculated from this.

Therefore, a tile distributor purchases and sells tiles in sqm. When selling, they will usually sell in whole cartons so the number of cartons would be calculated from the required area and rounded up. The setting Rounding Method set to “Carton” takes care of this.

Likewise, they usually stock the products in sqm because knowing the number of tiles or cartons in a warehouse for the reasons mentioned above.

On the other hand, picking would be done in cartons. The pickers will not be able to convert a quantity in sqm into the number of cartons for each different tile product to be picked.

Similarly, a stock take would be done in cartons since it’s easier to count these and have the system convert this into sqm for each different tile product.

[Note that whatever is described in this document about quantities in square metres applies to quantities in square yards since some companies use this as their preferred unit.]

The below screenshot shows an example of a tile product set up as follows:  
1 tile = 100 cm x 50 cm = 0.5 sqm  
1 sqm = 2 tiles  
1 carton = 8 tiles = 4 sqm

Tiles are stocked by area (sqm).  
The rounding method is Carton, i.e. when entering a value in sqm, the user would expect the converted value in cartons to be rounded up.

Graphical user interface

Description automatically generated

**Sales Process**

iQ handles the sales order process of a tile product very well. When a tile product is entered, the Tile Selling Quantity Selection window appears allowing the user to enter the quantity. This can be in sqm, cartons or even tiles. The rounding method dropdown is set to Carton by default as per the product’s setup. This means that when entering the area or quantity of tiles, the number of cartons is calculated and rounded up so that only whole cartons are sold.

The screenshots below show that when ordering 9 sqm, iQ converts this as follows:   
9 sqm = 18 tiles = 2.25 cartons -> rounded to 3 cartons  
3 cartons = 24 tiles = 12 sqm  
The same conversion would be done if entering the number of tiles.

Graphical user interface

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Graphical user interface

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Graphical user interface, text, application, email

Description automatically generated

If the quantity is not auto allocated and the user tries to allocate the quantity, upon interaction with a tile line, the Tile Selling Quantity Selection window pops up so the user can enter the quantity of cartons which are being delivered.

Graphical user interface, application

Description automatically generated

This is all correct and works as expected.

**Sales Order - Batch/Bin Allocation**

When ordering tiles, a batch might need to be allocated to ensure a customer buys the whole quantity from the same batch. When coming back to buy extra tiles, customers would want to order the tile from the same batch as their previous order.

**Gap:**There is a gap when allocating a bin/batch to a tile product in a sales order. When clicking the list command “Batch/Bin Allocation” for a tile product, all quantities are shown in the stocking unit (sqm) and there is no way of viewing or entering the quantity in cartons.

Graphical user interface, application

Description automatically generated

**Requirement:**This screen should allow the user to view the quantities in a unit of their choice as well as enter the allocated quantity in that same unit. “Carton” would be the default unit for this screen (or it could default from a value set in the product’s Tile Configuration smart part). The conversion would be done on the fly as soon as the unit is changed by the picker.

**Picking Note and Batch/Bin Allocation**

**Gap:  
T**here is a gap when a picking note is created from the sales order. When a picker tries to confirm a picking note, they are presented with the screen shown below.

Graphical user interface, application

Description automatically generated

The “Quantity To Pick” and “Quantity Picked” columns have values in Tile SQM. This matches the units in the sales order, or maybe it is the Stocking Unit of the product. The field “Product.StockingUnits” can be added to the grid to show the pickers they have to pick 12 sqm at this stage. However, unless they can change the unit to cartons, they would still need to convert 12 sqm to 3 cartons. This ratio would vary for each product making it impossible to handle as they will not know it.

**Requirement:**What the pickers need is to see the quantity to pick with a unit of their choice as well as the ability to enter the quantity picked in that same unit. “Carton” would be the default unit for this screen (or it could default from a value set in the product’s Tile Configuration smart part). The conversion would be done on the fly as soon as the unit is changed by the picker.

**Gap:**The same scenario exists when clicking the “Batch/Bin Allocation” button from the Picking Note Confirmation screen as described earlier in the section Sales Order - Batch/Bin Allocation.

**Requirement:**The quantity allocated from a batch/bin must have the unit shown which the picker can change and the quantity converted correctly as described earlier.

Graphical user interface, application, table

Description automatically generated

**IBT Process – Incoming Transfer Request**

When the receiving branch creates an IBT request, the Tile Purchasing Quantity Selection window pops up and users can enter the number of tiles or sqm they need which is rounded up to cartons. This is correct.

Graphical user interface, text, application

Description automatically generated

**Potential bug:**Note that to round up to cartons, the Rounding Method first needs to be changed from Tile to Carton. So, although the product’s Rounding Method is set up as “Carton” in the Tile Configuration smart part, the product setting seems to be ignored on this screen and it defaults to “Tile”.

**IBT Process – Outgoing Transfer Request and Delivery**

In the serving branch, the Outgoing Transfer Request shows the quantity in sqm not cartons. The unit is not shown by default but users can add the field “Product.StockingUnits” to the grid.

Graphical user interface, application

Description automatically generated

**Gap:**  
There is a gap when a picking note is created for the outbound request, the same scenario exists as described for a sales picking note whereby the picking unit cannot be changed. There are also the same issues when allocating the bins/batches as described earlier.

**Requirement:**The same requirement exists when creating a picking note and when allocating bins/batches for an IBT as described earlier for a picking note generated from a sales order.

Graphical user interface, text, application, email

Description automatically generated

If an Inter Branch Stock Transfer Delivery Note is created from the Outgoing Transfer Request, upon clicking the “Quantity Delivered“ cell, the Tile Purchasing Quantity Selection window pops up so the user can enter the quantity of cartons which are being delivered. This is as expected.

Graphical user interface, application

Description automatically generated

**Potential bug:**Again, note that to round up to cartons, the Rounding Method first needs to be changed from Tile to Carton. So, although the product’s Rounding Method is set up as “Carton” in the Tile Configuration smart part, the product setting seems to be ignored on this screen and it defaults to “Tile”.

**IBT Process – Incoming Transfer Delivery**

After the serving branch creates the outgoing delivery, the receiving branch can accept the Incoming Transfer Delivery. Upon clicking the “Quantity Delivered“ cell, the Tile Purchasing Quantity Selection window pops up so the user can enter the quantity of cartons which are being delivered. This can be changed in case there are less or more cartons, and the area will be updated accordingly.

This is as expected.

Graphical user interface, application

Description automatically generated

**Potential bug:**Again, note that to round up to cartons, the Rounding Method first needs to be changed from Tile to Carton. So, although the product’s Rounding Method is set up as “Carton” in the Tile Configuration smart part, the product setting seems to be ignored on this screen and it defaults to “Tile”.

**Purchase Requisition and Purchase Order**

When creating a Purchase Requisition and Purchase Order for a tile product, the user has the option to select the unit in which the tile is being ordered.

Graphical user interface, application

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Graphical user interface, table

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**Purchase Delivery Note**

When confirming delivery of the PO, the Purchase Delivery Note (PDN) does not allow the user to change the unit. Unlike, a Sales Delivery Note, nothing happens when interacting with the tile line or clicking the “Received Qty” cell. However, the user can click the button “Tile Quantity-CTL-T” and the Tile Purchasing Quantity Selection window will pop up. The user can enter the quantity received in cartons, tiles or sqm. Therefore, the system works as expected.

Graphical user interface, text, application

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Graphical user interface, application

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**Purchase Delivery Note Bin/Batch Allocation**

**Gap:**When doing the Batch/Bin Allocation, the unit cannot be changed and the person confirming the received quantity will need to confirm it in the Stocking Unit.

Graphical user interface, application

Description automatically generated

**Requirement:**This is the same requirement as when allocating bins/batches on a sales order or picking note. The quantity allocated from a batch/bin must have the unit shown which the user can change and the quantity converted correctly. Users should be able to enter the quantity in the unit they select as described earlier.

**Note about units in different screens:**Note that the quantity in the bin/batch allocation window is not in Purchasing Units. So, if the unit on the PO is Carton, the quantity and unit in the PDN will match those in the PO (Carton) but the quantity in the Stock Bin Allocation popup will be different as it will be in the Stocking Unit (sqm). This is shown in the following three screenshots.

Graphical user interface, text, application, email

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Graphical user interface, application

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Graphical user interface, application

Description automatically generated

**Purchase Credit Request**

The quantity in a Purchase Credit Request is shown in the Purchase Units.

Graphical user interface, text, application

Description automatically generated

When allocating bin/batch to the tile product, the screen is different from the other batch allocation screens described earlier. There are columns for quantities in different units. When changing the Carton Quantity value, Quantity will also change, and vice-versa.

When changing Quantity (which is the value in sqm), the other fields will get populated accordingly. For example, when entering the Quantity of 13 (sqm), the other fields populate a follows: 3 Cartons (3 x 8 tiles = 24 tiles) and 2 Tiles. Total of 26 tiles since each tile is 0.5 sqm.

**Graphical user interface, application

Description automatically generated**

This is correct and the same approach could be used to resolve the other issues described earlier.

**Stock Taking**

**Gap:**  
When creating a stock take for a tile product and entering the actuals, the quantities shown and entered by the user are all in the stocking unit (sqm). The user cannot enter actuals in another unit.

Timeline

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Graphical user interface, application

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Graphical user interface, text, application

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Note, however, that when viewing the stock take, the Stock Level column can be added for different tile statistics (e.g. Tile Carton Stocking Statistics, Tile Pallet Stocking Statistics) can be added in the window shown in the above screenshot but cannot be edited or entered as actuals anywhere.

Graphical user interface, table

Description automatically generated

**Requirement:**This is the same requirement as when entering quantities in a picking note or allocating quantities to bins/batches. The actual quantity entered must have the unit shown which the user can change and the quantity converted correctly. Users should be able to enter the quantity in the unit they select as described earlier. The user might enter quantities in more than one unit, for example 5 Pallets, 23 Cartons and 10 Tiles. These would be converted to the stocking unit and summed up. The screen might for this might be similar to the Stock Bin Allocation screen shown earlier for a Purchase Credit Request.

Note that this solution has to be compatible with the following screens:

* Enter Actuals (iQ)
* Import Actuals (iQ)
* Mobile Warehouse

Acceptance Criteria

The screens and process described so far will be used to test this change request. These need to allow to change the tile unit and enter or view the quantities in the selected unit.

Note that here might be other processes which I am unaware of at this stage which have the same issue and would provide benefit to users if they could change the tile unit and enter or view the quantities in that unit.