# Oracle® Retail Warehouse Management System

User Interface Guide

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Oracle® Retail Warehouse Management System User Interface Guide, Release 12.0.12



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## Value-Added Reseller (VAR) Language

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# Contents

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# Preface

Oracle Retail Warehouse Management System (RWMS) is a N-tier, Web-architected warehouse management system. RWMS is the centerpiece of the Oracle Retail Enterprise, a suite of software products that manages and optimizes retail and consumer-direct (catalog, e-commerce) supply chains. RWMS streamlines the supply chain for multi-channel retailers, including store, catalog, and e-commerce retailers. RWMS also supports consumer-direct fulfillment capabilities, moving merchandise both to and from the customer faster and at a lower cost.

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## Related Documents

For more information, see the following documents in the Oracle Retail Warehouse Management System Release 12.0.12 documentation set:

- *Oracle Retail Warehouse Management System Installation Guide*
- *Oracle Retail Warehouse Management System Radio Frequency User Guide*
- *Oracle Retail Warehouse Management System Online Help*
- *Oracle Retail Warehouse Management System Release Notes*

## Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

## Review Patch Documentation

If you are installing the application for the first time, you install either a base release (for example, 12.0) or a later patch release (for example, 12.0.10). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release and code changes that have been made since the base release.

## Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:
http://www.oracle.com/technology/documentation/oracle_retail.html

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

## Conventions

**Navigate:** This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement "the Window Name window opens."

```
This is a code sample
    It is used to display examples of code
```

# 1

# ASN Entry

## ASN Entry Overview

Advanced shipment notices (ASN) may be entered directly into the system with a standard web browser and Internet or intranet connection. This feature offers low cost, global access to an existing Internet infrastructure. After ASNs are entered, inbound freight scheduling can be handled in the standard way.

If you log on as a valid vendor, the ASNs that are associated with your vendor number are automatically displayed. You see only those details pertaining to your user ID and vendor number. Retail users have access to the details associated with all vendors.

The ASN may be one of the following types:

- Container type ASN: Merchandise comes to the distribution center in containers with UCC128 labels. Typically, these labels are provided by the vendor. These are usually cross-docked items.
- Purchase order (PO) type ASN: Merchandise shares the same ASN, PO, and destination ID. Merchandise does not come with UCC128 container labels.
- Tare type ASN: Merchandise is received on a pallet. There may be a single item or multiple items on the pallet. Tare type ASNs are received via electronic data interchange (EDI) transmissions.

### Business Process

You begin adding an ASN by entering header details. Before continuing, you must indicate whether the ASN is a PO type ASN (Type P) or a container type ASN (Type C).

If the ASN is a PO type ASN, you can add all line items on a selected PO or add line items individually from one or multiple POs.

If the ASN is a container type ASN, you add a container. Next, you can add all line items on a selected PO or add individual line items from the selected PO. A container may contain line items from a single purchase order only.

Two additional features are available for adding containers and items to container type ASNs:

- Copy: You can add a container and its contents to an ASN by copying an existing container from the same ASN. The new container will have the same PO, line item, and unit quantity per case.
- Replicate: You can add multiple containers by providing the details once and entering the number of containers that share those same details.

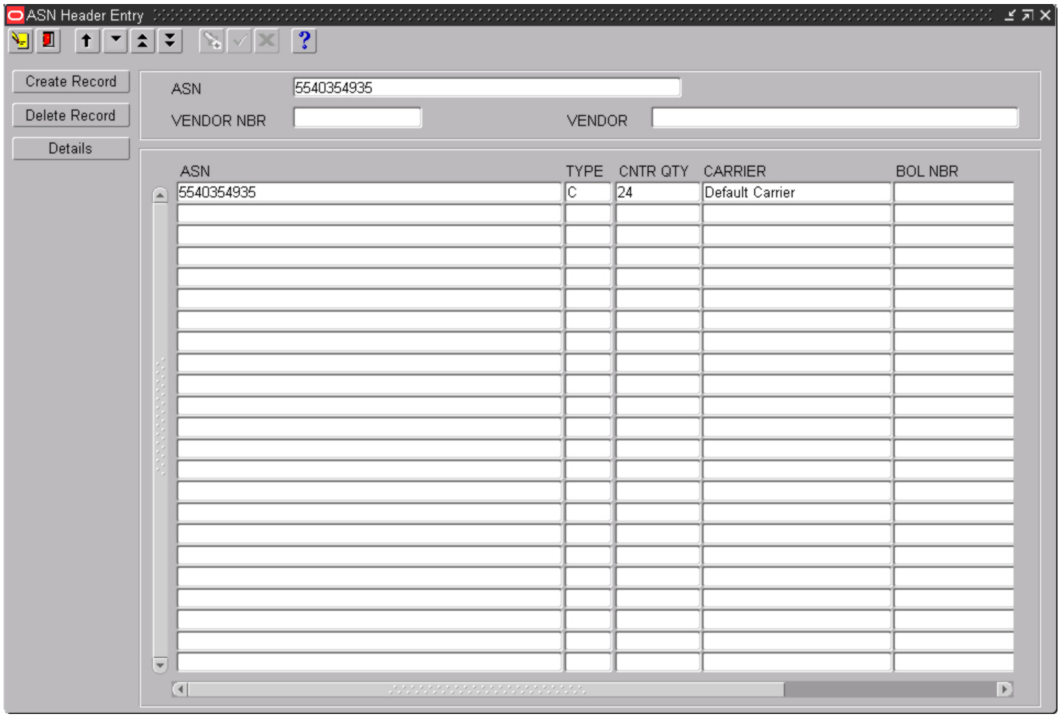
Only manually entered ASNs may be edited in RWMS. ASNs received from the host system or via electronic data interchange (EDI) can not be edited.

### Reports

There are no reports that pertain to ASN entry.

# Add a Container Type ASN

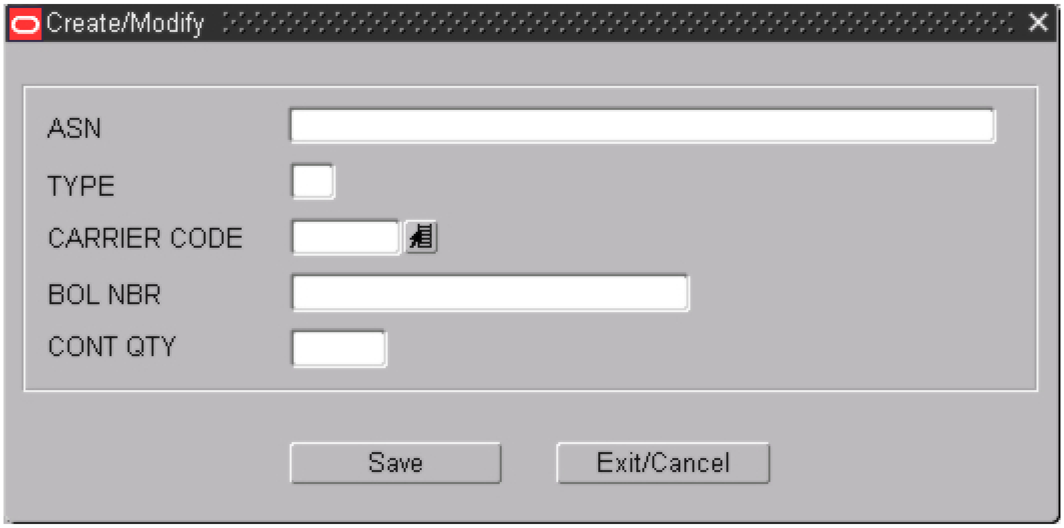
**Navigate:** From the main menu, select ASN Entry. The ASN Header Entry window opens.




**ASN Header Entry Window**

## Add an ASN

1. On the ASN Header Entry window, click **Create Record**. The Create/Modify window opens.




**Create/Modify Window**

2. In the ASN field, enter the ASN number.
3. In the Type field, enter C. The choices are C (container) and P (purchase order).
4. In the Carrier Code field, enter the code for the carrier, or click the LOV  button and select the carrier.
5. In the BOL Nbr field, enter the bill of lading number.
6. In the Cont Qty field, enter the number of inbound containers that are expected.
7. Click **Save** to save the changes and close the Create/Modify window.

## Add a Container to the ASN

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**Note:** Use the add procedure to add containers to an ASN one-by-one.

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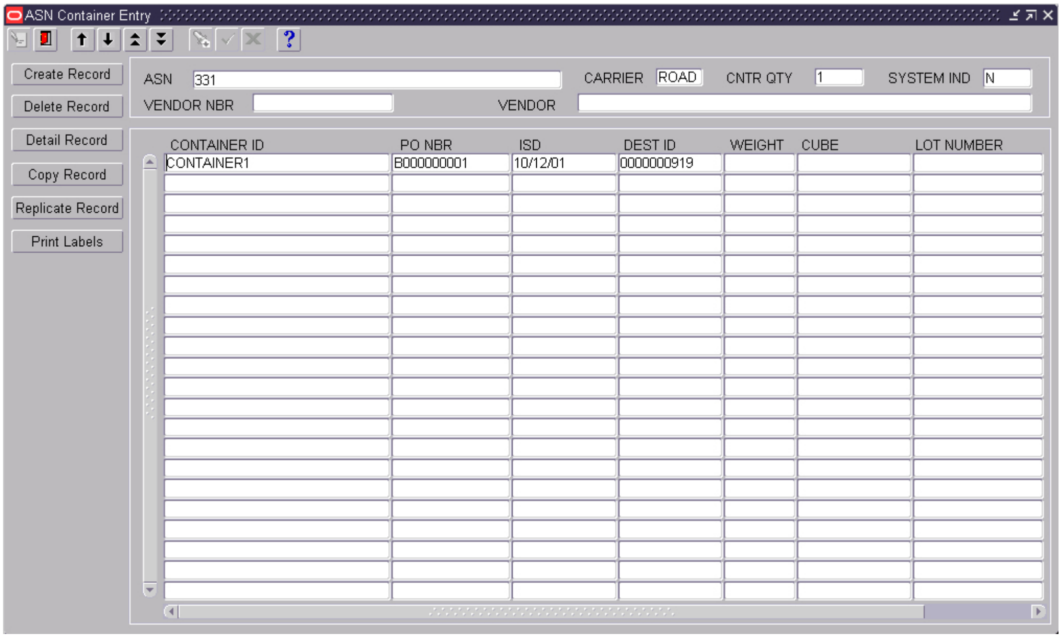
1. On the ASN Header Entry window, select the container type ASN that you want to edit.
2. Click **Details**. The ASN Container Entry window opens.



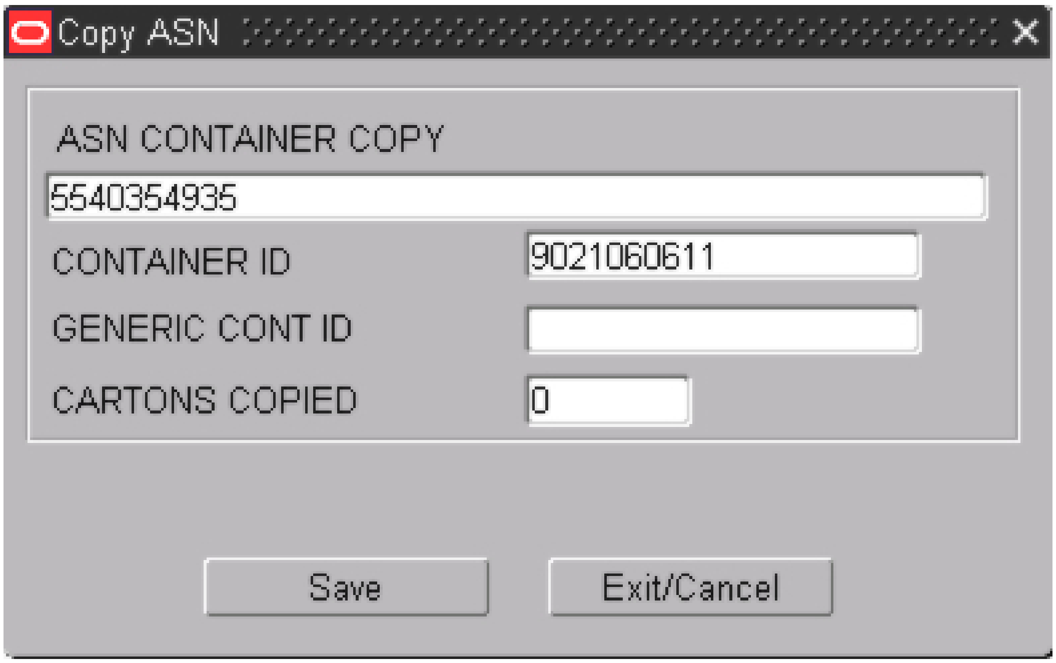

**ASN Container Entry Window**

3. Click **Create Record**. The Create/Modify window opens.
4. In the Container ID field, enter the ID of the container.
5. In the PO Nbr field, enter the number of the purchase order, or click the LOV  button and select the purchase order.
6. In the Dest ID field, enter the ID of the destination, or click the LOV  button and select the destination.
7. Enter any additional details as necessary.
8. Click **Save** to save the changes and close the Create/Modify window.

## Copy a Container

**Note:** Use the copy procedure to add another container that contains the same items and quantities as an existing container.

1. On the ASN Header Entry window, select the container type ASN that you want to edit.
2. Click **Details**. The ASN Container Entry window opens.
3. Select the container that you want to copy.
4. Click **Copy Record**. The Copy ASN window opens.



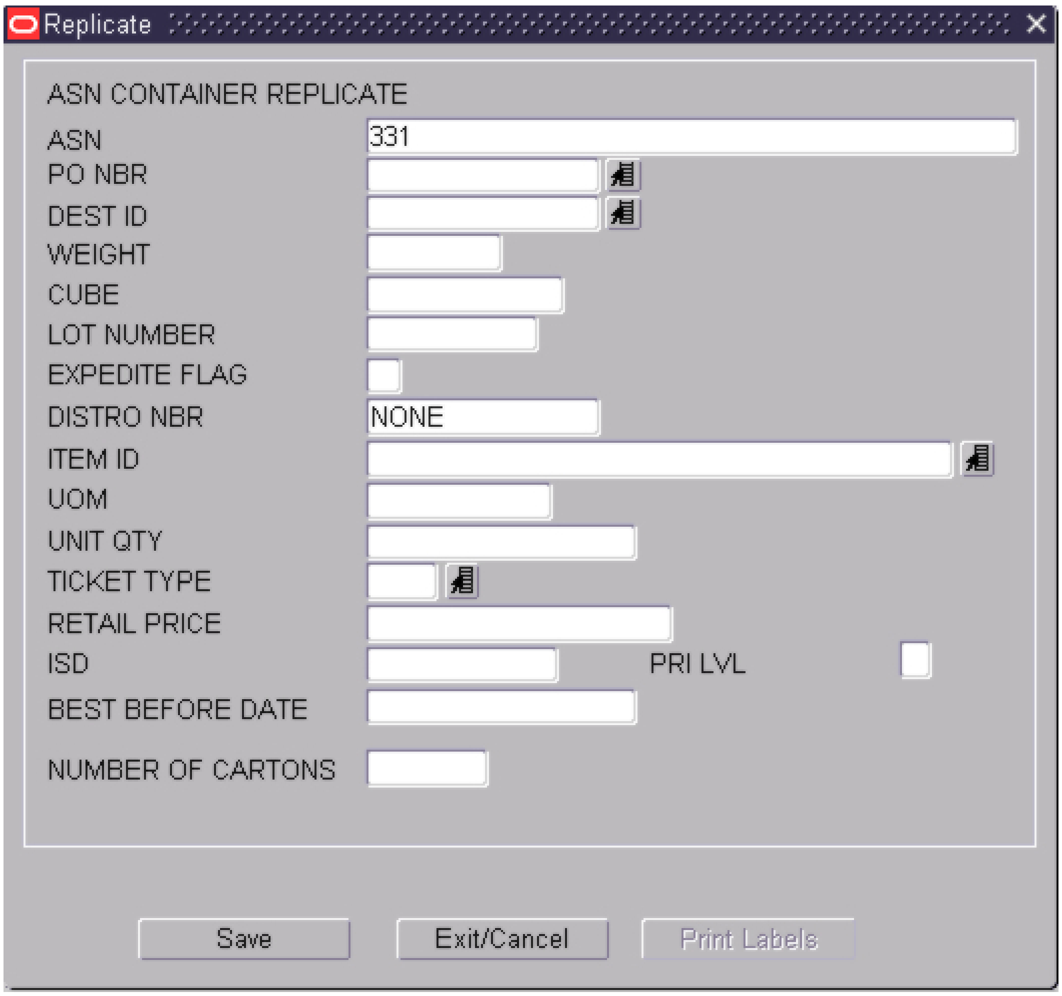

**Copy ASN Window**

5. In the Generic Cont ID field, enter the ID of the new container.
6. Click **Save**. The number in the Cartons Copied field is incremented by 1.
7. To make another copy of the container, enter another container ID in the Generic Cont ID field and click **Save**.
8. When you are done copying the container, click **Exit/Cancel**.

## Add Multiple Containers

**Note:** Use the replicate procedure to add multiple containers with the same details.

1. On the ASN Header Entry window, select the container type ASN that you want to edit.
2. Click **Details**. The ASN Container Entry window opens.
3. Click **Replicate Record**. The Replicate window opens.



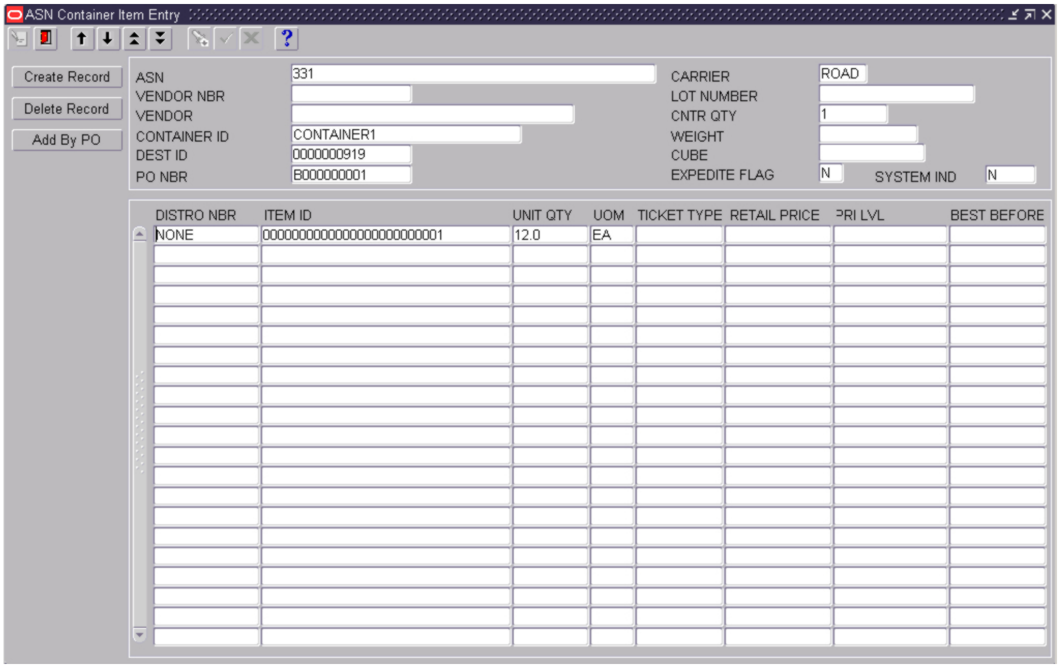

**Replicate Window**

4. In the PO Nbr field, enter the purchase order number, or click the LOV  button and select the purchase order.
5. Enter additional details as necessary.
6. In the Number of Cartons field, enter the number of containers that you want to add to the ASN.
7. Click **Save** to add the containers and close the Replicate window.

## Add Items to a Container

**Note:** If a container was not copied or replicated, it remains empty until you define the contents.

1. On the ASN Container Entry window, select the container that you want to edit.
2. Click **Detail Record**. The ASN Container Item Entry window opens.




**ASN Container Item Entry Window**

3. To add all the unappointed or unreceived items from the current purchase order, click **Add by PO**. The items appear on the table.
   To add one item from the current purchase order, click **Create Record**. The Create/Modify window opens.

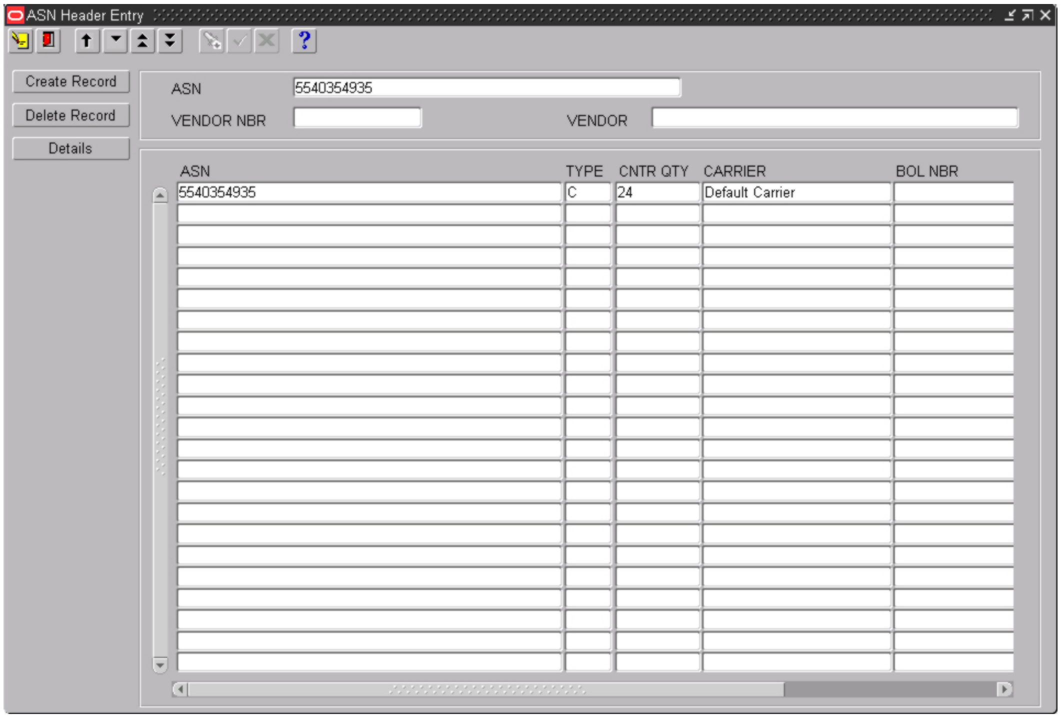
   a. In the Item ID field, enter the ID of the inbound item, or click the LOV  button and select the item.
   b. In the Unit Qty field, enter the number of inbound units.
   c. Enter any additional details as necessary.
   d. Click **Save** to save the changes and close the Create/Modify window.

## Exit the ASN Entry Windows

- Click the exit  button to close each window.

# Edit a Container Type ASN

**Navigate:** From the main menu, select ASN Entry. The ASN Header Entry window opens.




**ASN Header Entry Window**

> **Note:** If you log on as a vendor, all ASNs associated with your user ID and vendor number are automatically displayed. Only ASNs that were manually entered into RWMS may be edited. ASNs received from the host system or via EDI can not be edited.

## Display Header Details for all ASNs

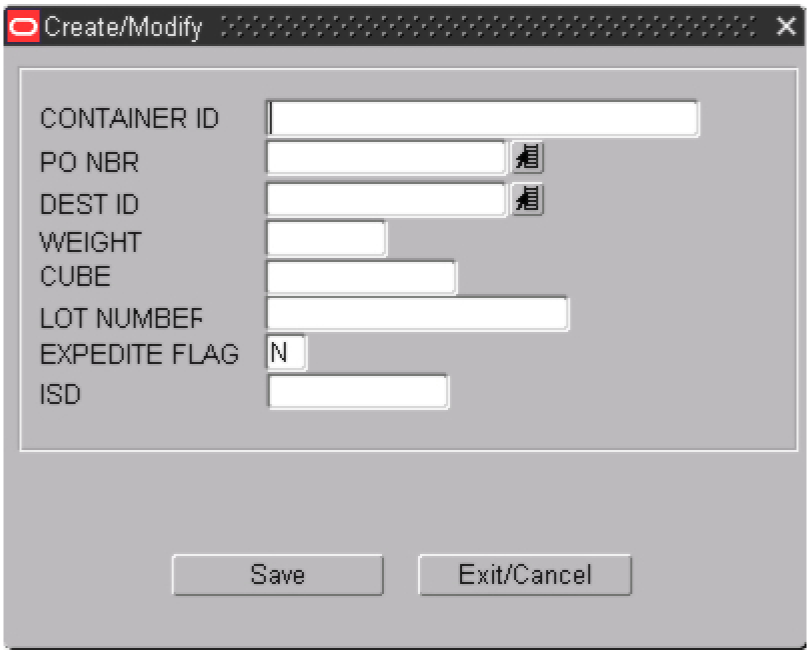
- Click the execute query button.

## Display Header Details for one ASN

1. If any ASNs are currently displayed, click the clear button.
2. Click the enter query button.
3. In the ASN query field, enter the ID of the ASN, or click the LOV button and select the ASN.
4. Click the execute query button. The header details for the selected ASN appear.

## Edit Header Details for an ASN

1. On the ASN Header Entry window, double-click the container type ASN that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save the changes and close the Create/Modify window.

## Delete an ASN

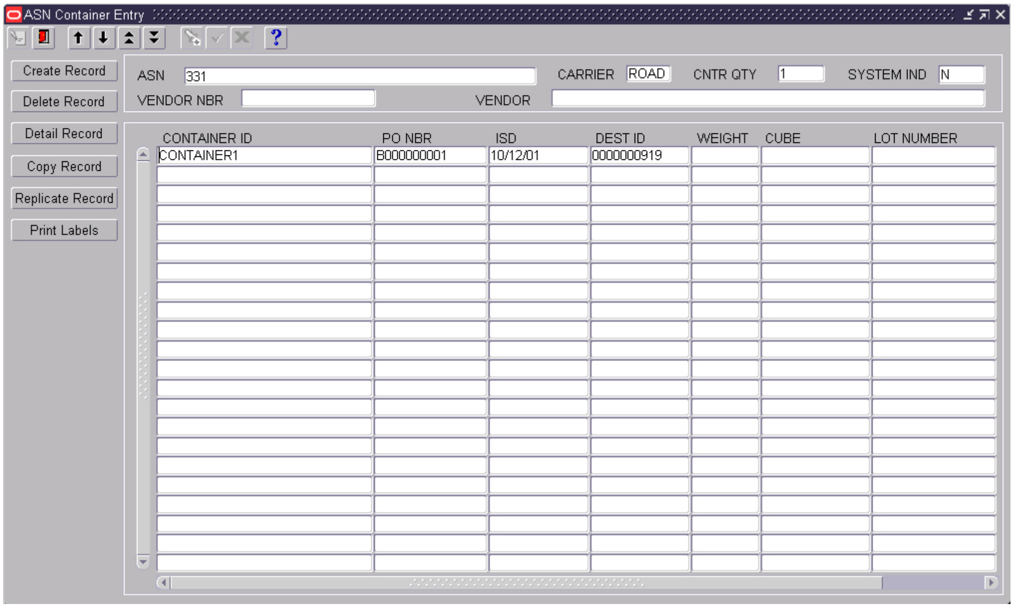
> **Note:** An ASN may be deleted if it is not assigned to an appointment or if the status of the appointment is Received.

1. On the ASN Header Entry window, select the container type ASN that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Edit Containers on an ASN

**Note:** A container may not be edited if it is assigned to an appointment that is not yet received.

1. On the ASN Header Entry window, select the container type ASN that you want to edit.
2. Click **Details**. The ASN Container Entry window opens.




**ASN Container Entry Window**

3. Double-click the container that you want to edit. The Create/Modify window opens.
4. Edit the enabled fields as necessary.
5. Click **Save** to save the changes and close the Create/Modify window.

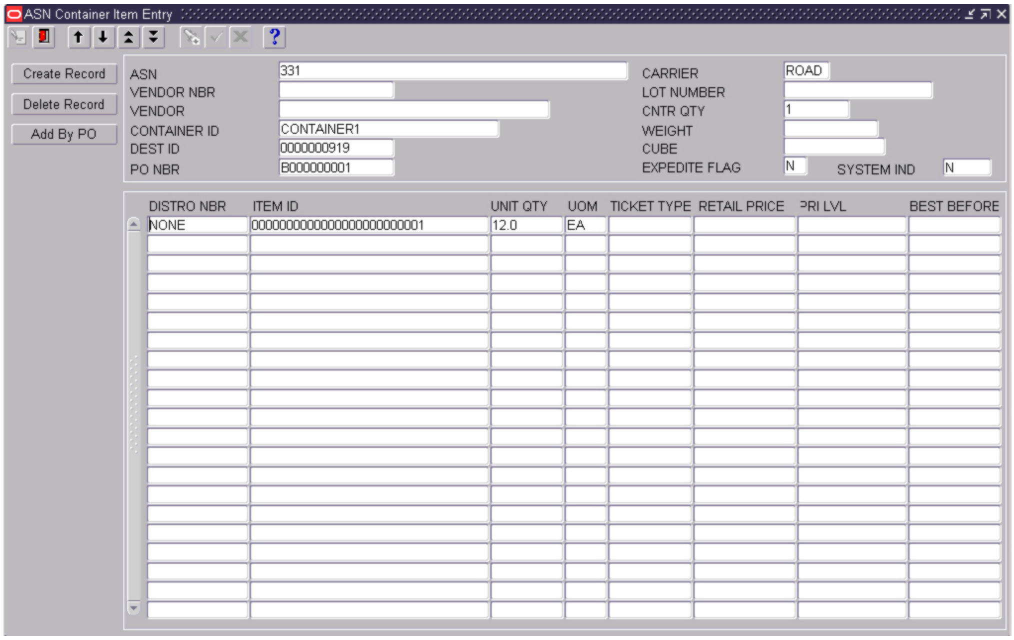
## Delete a Container from an ASN

**Note:** A container may not be deleted if it is already received.

1. On the ASN Header Entry window, select the container type ASN that you want to edit.
2. Click **Details**. The ASN Container Entry window opens.
3. Select the container that you want to delete.
4. Click **Delete Record**.
5. When prompted to delete the record, click **Yes**.

## Edit Line Items on an ASN

1. On the ASN Container Entry window, select the container that you want to edit.
2. Click **Detail Record**. The ASN Container Item Entry window opens.




**ASN Container Item Entry Window**

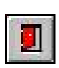
3. Double-click the line item that you want to edit. The Create/Modify window opens.
4. Edit the enabled fields as necessary.
5. Click **Save** to save the changes and close the Create/Modify window.

## Delete a Line Item from an ASN

> **Note:** A line item may not be deleted if it is assigned to an appointment with a status of Open, Pending, Received, or Unreconciled or the container is received.

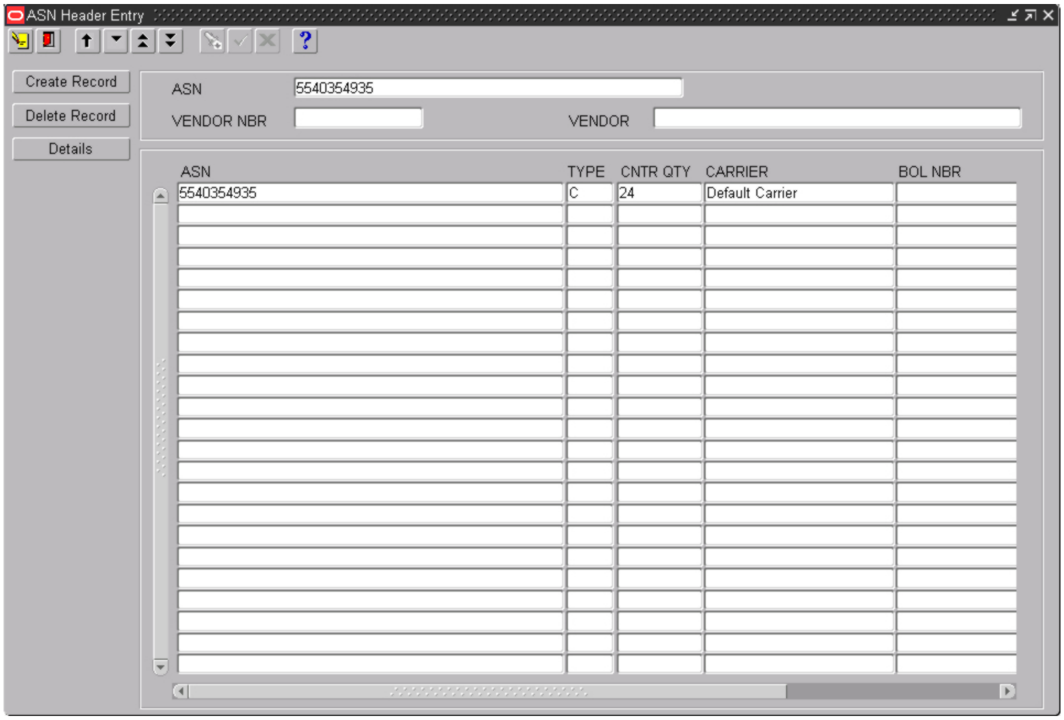
1. On the ASN Container Entry window, select the container that you want to edit.
2. Click **Detail Record**. The ASN Container Item Entry window opens.
3. Select the line item that you want to delete.
4. Click **Delete Record**.
5. When prompted to delete the record, click **Yes**.

## Exit the ASN Entry Windows

- Click the exit  button to close each window.

# Add a Purchase Order Type ASN

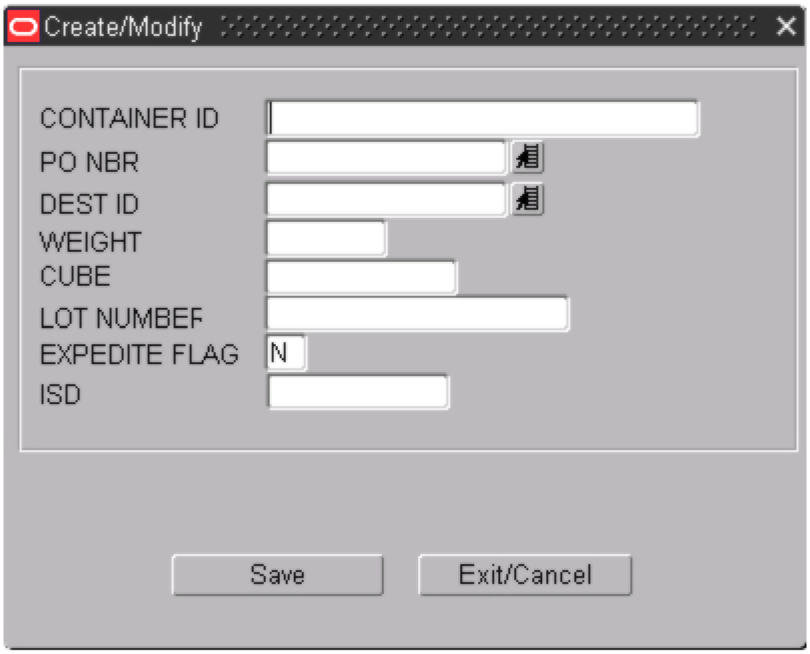
**Navigate:** From the main menu, select ASN Entry. The ASN Header Entry window opens.




**ASN Header Entry Window**

## Add an ASN

1. On the ASN Header Entry window, click **Create Record**. The Create/Modify window opens.



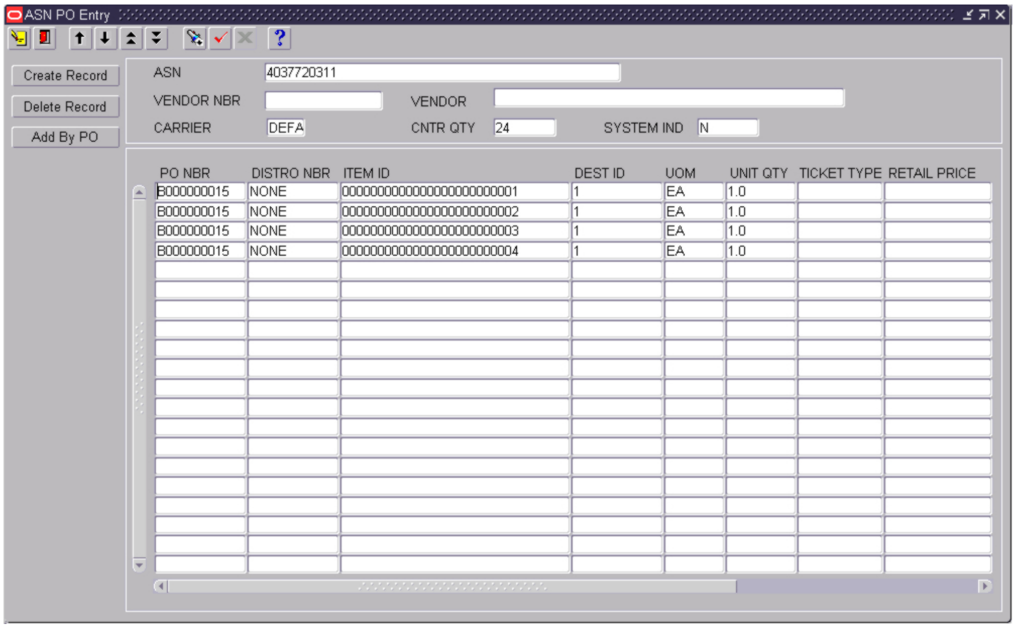

**Create/Modify Window**

2. In the ASN field, enter the ASN number.
3. In the Type field, enter P. The choices are C (container) and P (purchase order).
4. In the Carrier Code field, enter the code for the carrier, or click the LOV  button and select the carrier.
5. In the BOL Nbr field, enter the bill of lading number.
6. In the Cont Qty field, enter the number of inbound containers that are expected.
7. Click **Save** to save the changes and close the Create/Modify window.

## Add PO/Items to the ASN

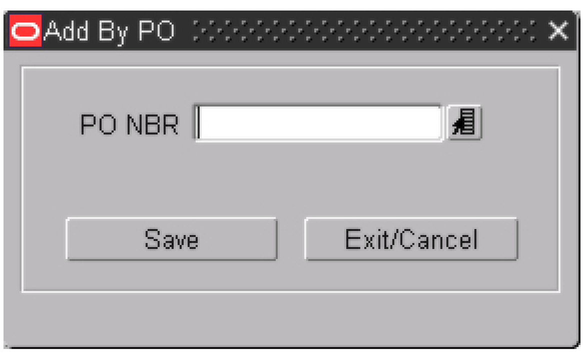
**Note:** Step two explains how to add all items from a selected PO. Step three explains how to add a single line item from a selected PO.

1. On the ASN Header Entry window, select the PO type ASN that you want to edit. The ASN PO Entry window opens.




**ASN PO Entry Window**

2. To add all items on a purchase order:
   a. Click **Add by PO**. The Add by PO window opens.




**Add By PO Window**

   b. In the PO Nbr field, enter the purchase order number, or click the LOV  button and select the purchase order.

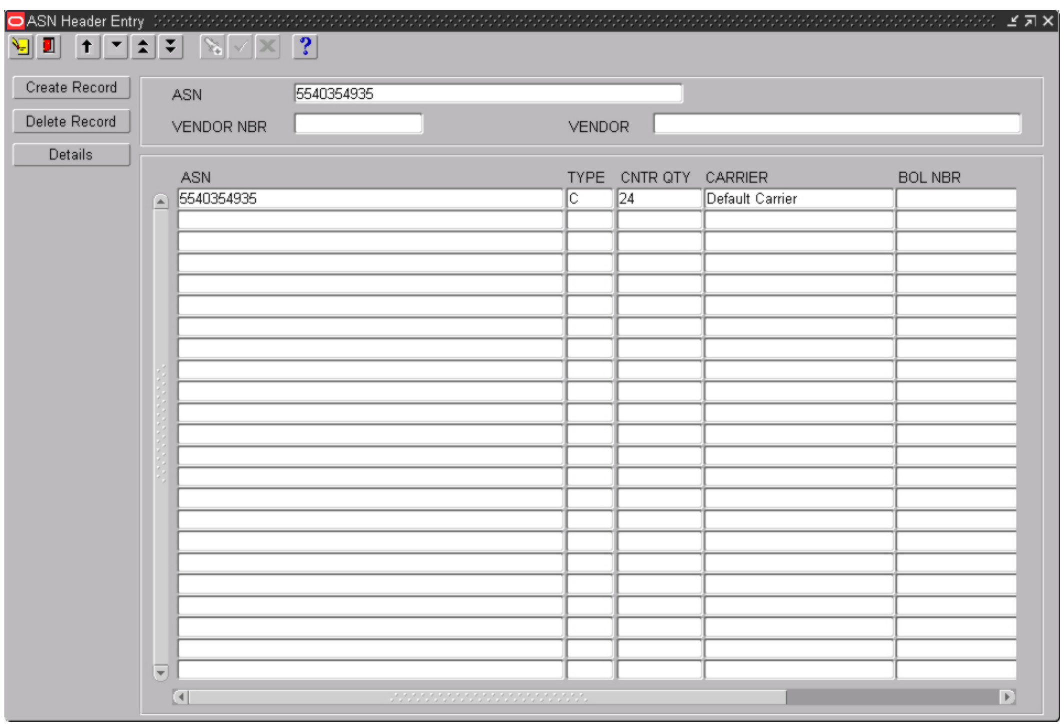
3. To add a line item from a purchase order:
   a. Click **Create Record**. The Create/Modify window opens.
   b. In the PO Nbr field, enter the purchase order number, or click the LOV button and select the purchase order.
   c. In the Item ID field, enter the ID of the inbound item, or click the LOV button and select the item.
   d. In the Unit Qty field, enter the number of inbound units.
   e. In the Dest ID field, enter the ID of the destination, or click the LOV button and select the destination.
   f. Enter any additional details as necessary.
   g. Click **Save** to save the changes and close the Create/Modify window.

## Exit the ASN Entry Windows

- Click the exit button to close each window.

# Edit a Purchase Order Type ASN

**Navigate:** From the main menu, select ASN Entry. The ASN Header Entry window opens.




**ASN Header Entry Window**

**Note:** If you log on as a vendor, all ASNs associated with your user ID and vendor number are automatically displayed. Only ASNs that were manually entered into RWMS may be edited. ASNs received from the host system or via EDI can not be edited.

## Display Header Details for All ASNs

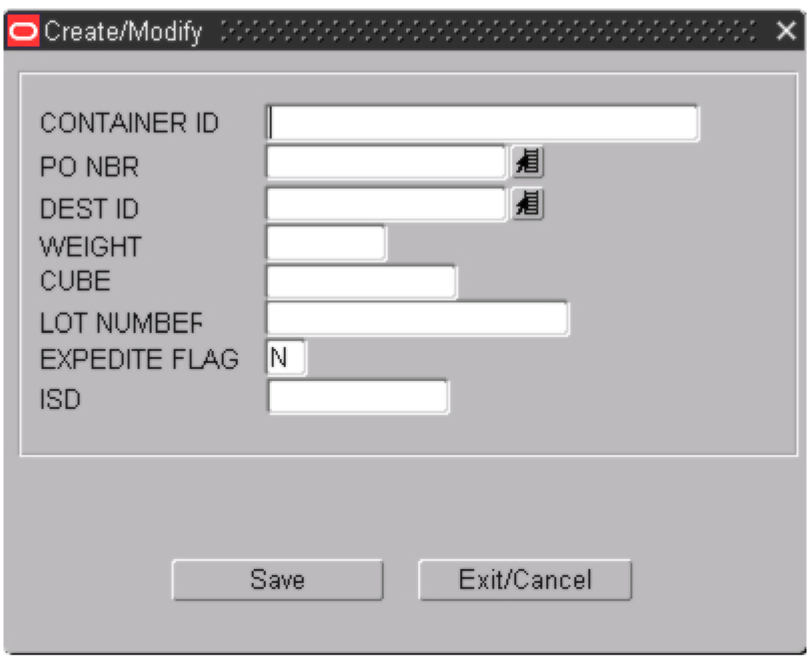
- Click the execute query button.

## Display Header Details for One ASN

1. If any ASNs are currently displayed, click the clear button.
2. Click the enter query button.
3. In the ASN query field, enter the ID of the ASN, or click the LOV button and select the ASN.
4. Click the execute query button. The header details for the selected ASN appear.

## Edit Header Details on an ASN

1. On the ASN Header Entry window, double-click the PO type ASN that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save the changes and close the Create/Modify window.

## Delete an ASN

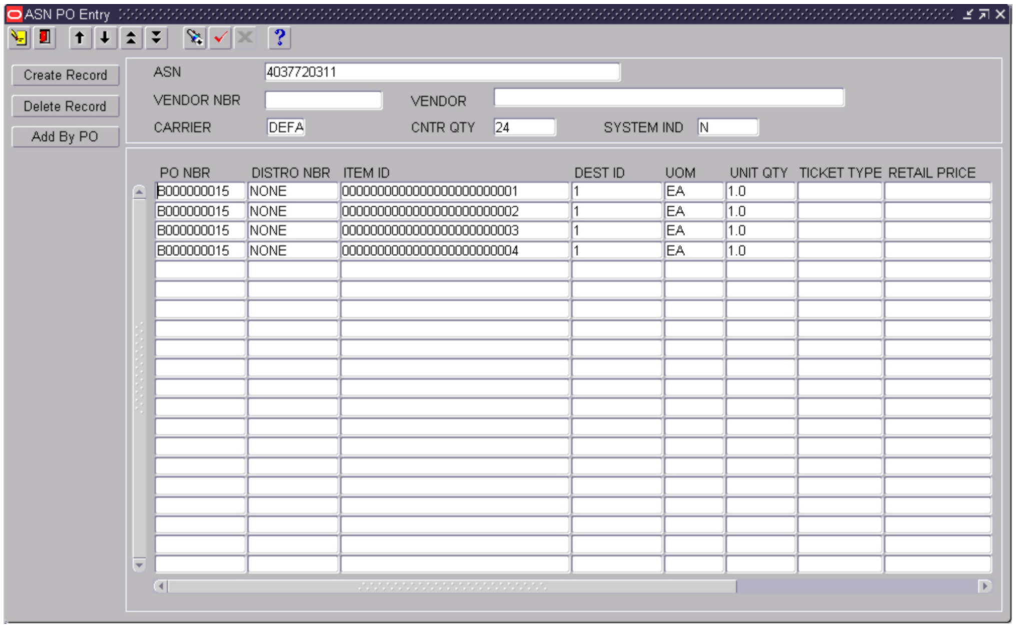
**Note:** An ASN may be deleted if it is not assigned to an appointment or if the status of the appointment is Received.

1. On the ASN Header Entry window, select the PO type ASN that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Edit Line Items on an ASN

**Note:** Line items may not be edited if the ASN is assigned to an appointment.

1. On the ASN Header Entry window, select the PO type ASN that you want to edit.
2. Click **Details**. The ASN PO Entry window opens.




**ASN PO Entry Window**

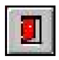
3. Double-click the line item that you want to edit. The Create/Modify window opens.
4. Edit the enabled fields as necessary.
5. Click **Save** to save the changes and close the Create/Modify window.

## Delete a Line Item from an ASN

> **Note:** A line item may not be deleted if it is assigned to an appointment with a status of Open, Pending, Received, or Unreconciled.

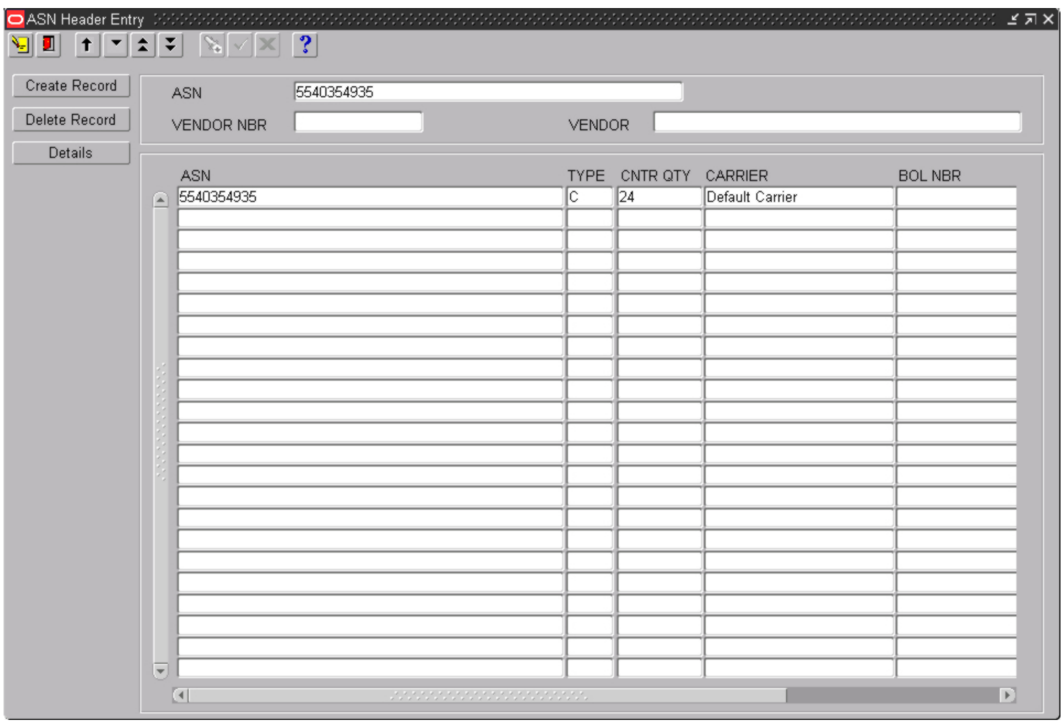
1. On the ASN Header Entry window, select the PO type ASN that you want to edit.
2. Click **Details**. The ASN PO Entry window opens.
3. Select the line item that you want to delete.
4. Click **Delete Record**.
5. When prompted to delete the record, click **Yes**.

## Exit the ASN Entry Windows

- Click the exit  button to close each window.

# Generate Receiving Labels for Container Type ASNs

**Navigate:** From the main menu, select ASN Entry. The ASN Header Entry window opens.




**ASN Header Entry Window**

> **Note:** If you log on as a vendor, all ASNs associated with your user ID and vendor number are automatically displayed.

## Display Header Details for All ASNs

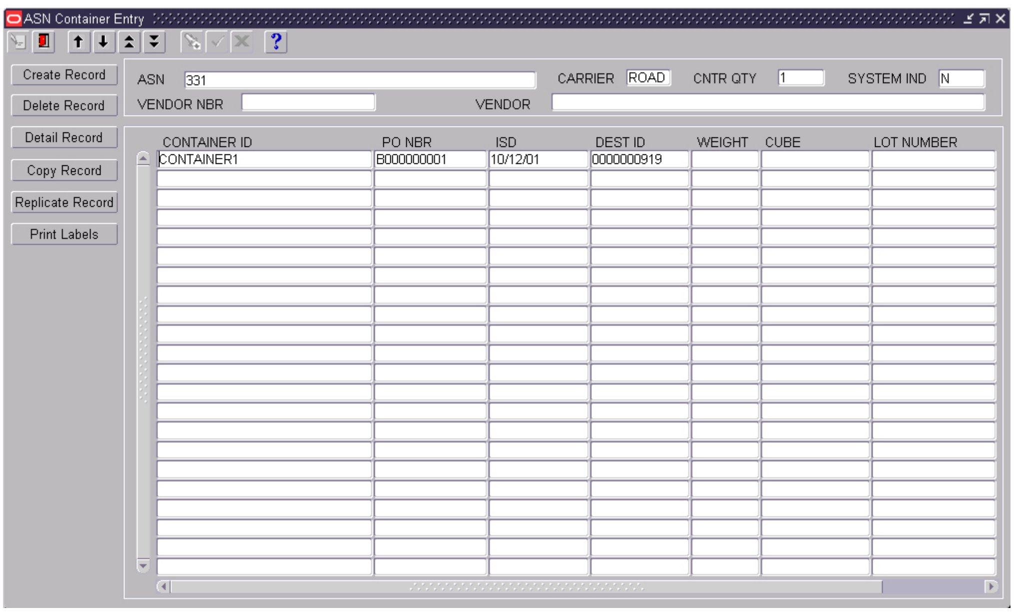
- Click the execute query  button.

## Display Header Details for One ASN

1. If any ASNs are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the ASN query field, enter the ID of the ASN, or click the LOV  button and select the ASN.
4. Click the execute query  button. The header details for the selected ASN appear.

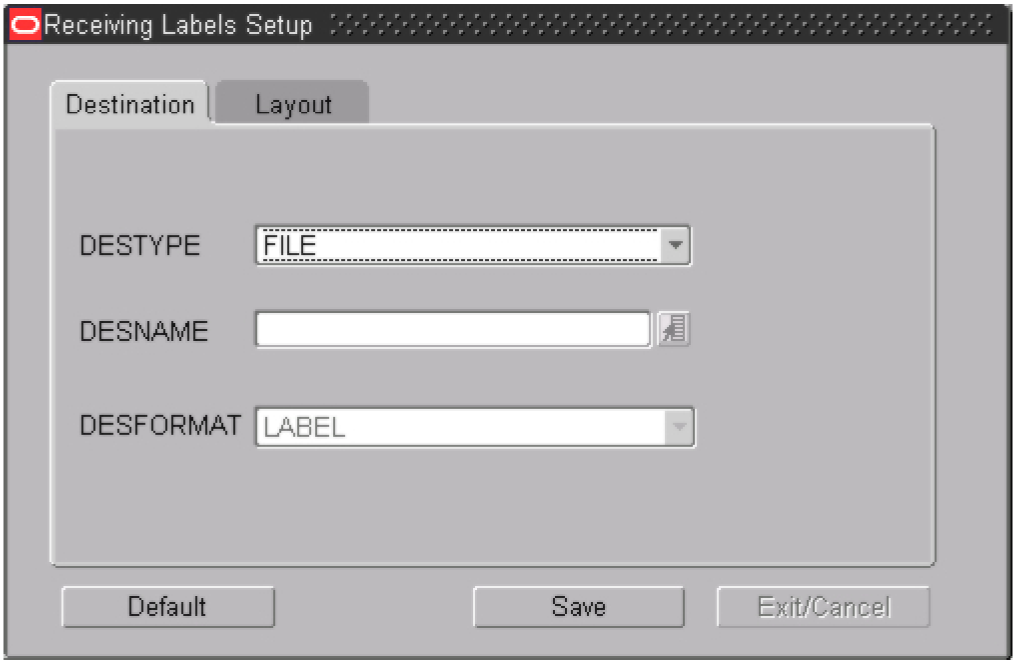
## Print Receiving Labels

1. On the ASN Header window, select the container type ASN for which you want to print labels.
2. Click **Details**. The ASN Container Entry window opens.




**ASN Container Entry Window**

3. Select a container.
4. Click **Print Labels**. The Receiving Labels Setup window opens.




**Receiving Labels Setup Window**

5. In the Destype field, select the type of destination.
6. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

7. To view the layout of the report, click on the Layout tab.
8. Click **Save**. The labels are sent to the selected destination.

# 2
# Appointments

## Appointments Overview

An appointment is an arrangement to receive merchandise into the distribution center at a specified time and place. A valid appointment consists of the following details: date, time, and receiving door. Advanced shipment notices (ASN) or purchase orders with items and unit quantities are associated with appointments.

The receiving window or window of opportunity, for an appointment is based on the Deliver Not Before and Deliver Not After dates found on a purchase order. Only one trailer may be assigned to an appointment, but one trailer may contain merchandise from multiple purchase orders or some of the merchandise from one purchase order.

The system tracks the status of an appointment from the moment it is entered into the system. The status may be:

- Unscheduled (Unsc): The appointment was entered into the system without one or more of the following: date, time, or receiving door. A receiving package is not generated for unscheduled appointments.
- Scheduled (Schd): The appointment appears on the calendar. The merchandise to be received may or may not be known.
- Pending (Pend): A receiving package was printed in anticipation of the arrival of the expected merchandise.
- Open (Open): The trailer that is associated with the appointment is being unloaded.
- Unreconciled (Unrc): The appointment has some discrepancies concerning what was received. The appointment must be reconciled. The door, however, is available for another appointment.
- Received (Rcvd): The expected merchandise was received during the appointment.

## Business Process

An appointment may be entered into the system with minimal information. If the date, time, and receiving door are entered, the appointment appears on the calendar. Otherwise, it is held in the system as an unscheduled appointment.

The details of an appointment are entered from purchase orders or ASNs. Purchase orders and items are generally received from the host system. Purchase orders may also be created automatically in RWMS from store to DC transfers. ASNs may be received from an external source or entered manually.

Several types of appointments may be entered into the system:

- Non-ASN/Non-NSC: Appointment details are entered from purchase orders. Casepack quantities are known. Lot numbers can be entered for items on this type of appointment. (NSC means non-specified casepack.)
- Non-ASN/NSC: Appointment details are entered from purchase orders. Casepack quantities are not known.
- ASN/NSC: Appointment details are entered from ASNs. Casepack quantities are known for container type ASNs but unknown for PO type ASNs.
- ASN/Non-NSC: Appointment details are entered from ASNs. Casepack quantities are known.

As you set up an appointment, you can indicate whether quality assurance or vendor audit checks should be made on the merchandise when it is received. In such cases, you can indicate the sampling percentages and number of containers at the style level.

Unscheduled appointments (those without a date, time, or receiving door) can be scheduled when the missing details are known. You can access schedules for receiving doors in order to:

- schedule unscheduled appointments
- change existing schedules
- block or unblock access to doors
- view a bar chart that shows utilization percentages by door for a specified date

You can look up appointments, ASNs, and purchase orders in the Appointments module.

## Reports

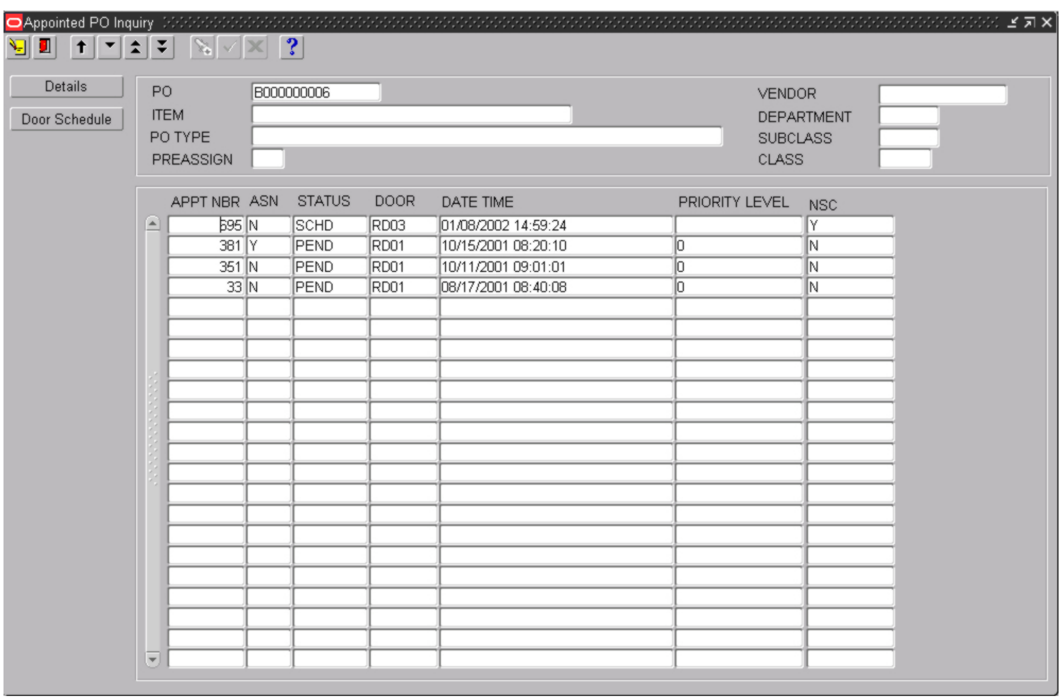
There are two versions of the Appointment Schedule report:

- When requested from the Appointment Schedule window, the report lists all scheduled appointments for the specified date.
- When requested from the Unscheduled Appointment Inquiry window, the report lists all unscheduled appointments.

The Appointment Compliance report lists all appointments received on a specified date that have trouble codes.

# View Appointments

**Navigate:** From the main menu, select Appointments > Appointed PO Inquiry. The Appointed PO Inquiry window opens.




**Appointed PO Inquiry Window**

**Note:** You can also access this window from the PO Inquiry window.

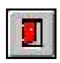
## Display all Appointments

- Click the execute query  button.

## Display a Subset of the Appointments

1. If any appointments are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the one or more of the query fields, enter the desired criteria.
4. Click the execute  query button. The appointments that match the criteria are displayed.

## View the Details of an Appointment

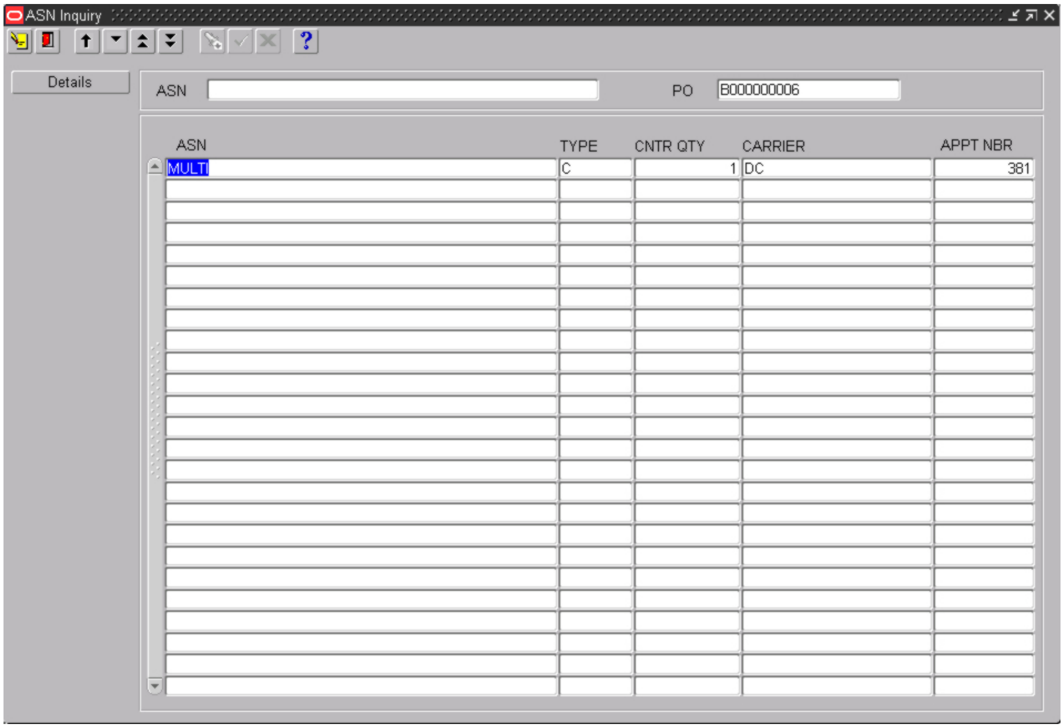
1. On the Appointment PO Inquiry window, select the appointment that you want to view in detail.
2. Click **Details**. The details appear in the appropriate detail window.
3. Click the exit  button to close the detail window.

## Exit the Appointed PO Inquiry Window

- Click the exit  button to close the window.

# View ASNs

**Navigate:** From the main menu, select Appointments > ASN Inquiry. The ASN Inquiry window opens.



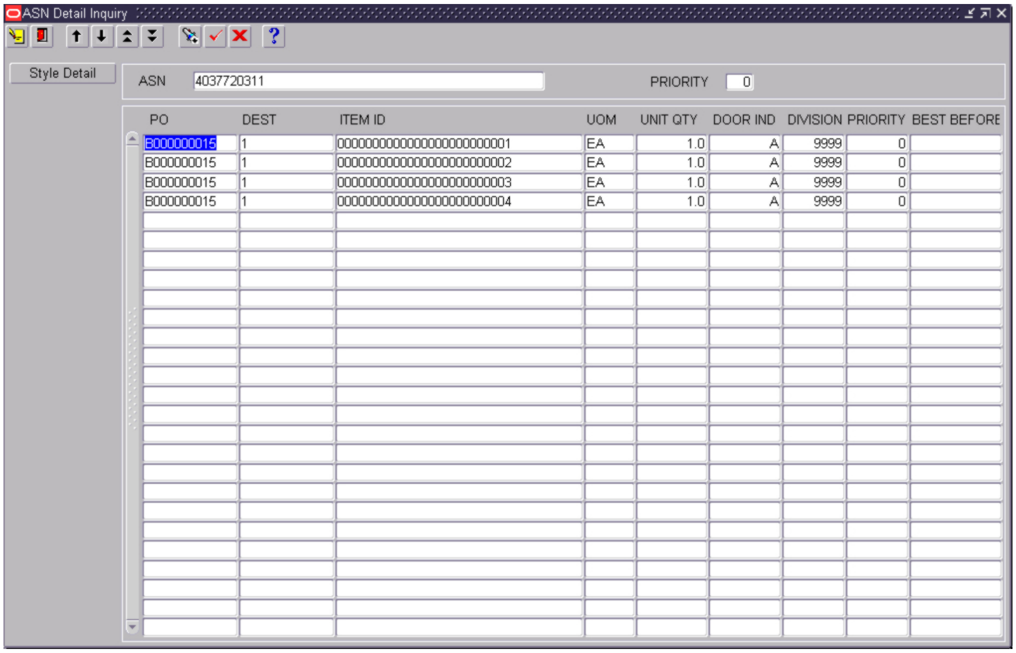

**ASN Inquiry Window**

## Display ASNs

1. If any ASNs are currently displayed, click the clear  button.
2. Click the enter query  button.
3. Enter criteria in one or both of the query fields.
4. Click the execute  query button. The ASNs that match the criteria appear.

## View the Details of an ASN

1. On the ASN Inquiry window, select the ASN that you want to view in detail.
2. Click **Details**. The PO/line items appear in the ASN Detail Inquiry window.




**ASN Detail Inquiry Window**

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**Note:** You can also access this window from the Appointment ASN window.

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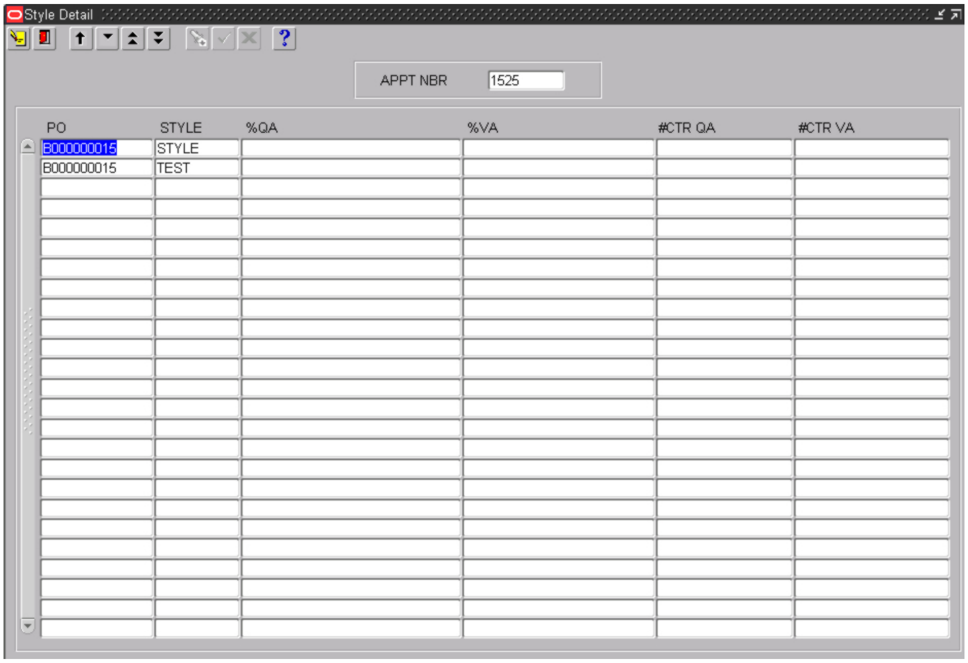
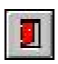
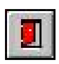
3. To view details at the style level:
   a. Click **Style Detail**. The details appear in the Style Detail window.



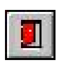

**Style Detail Window**

> **Note:** You can also access this window from the Appointment Detail and NSC Appointment Detail windows.

**b.** Click the  exit button to close the Style Detail window.

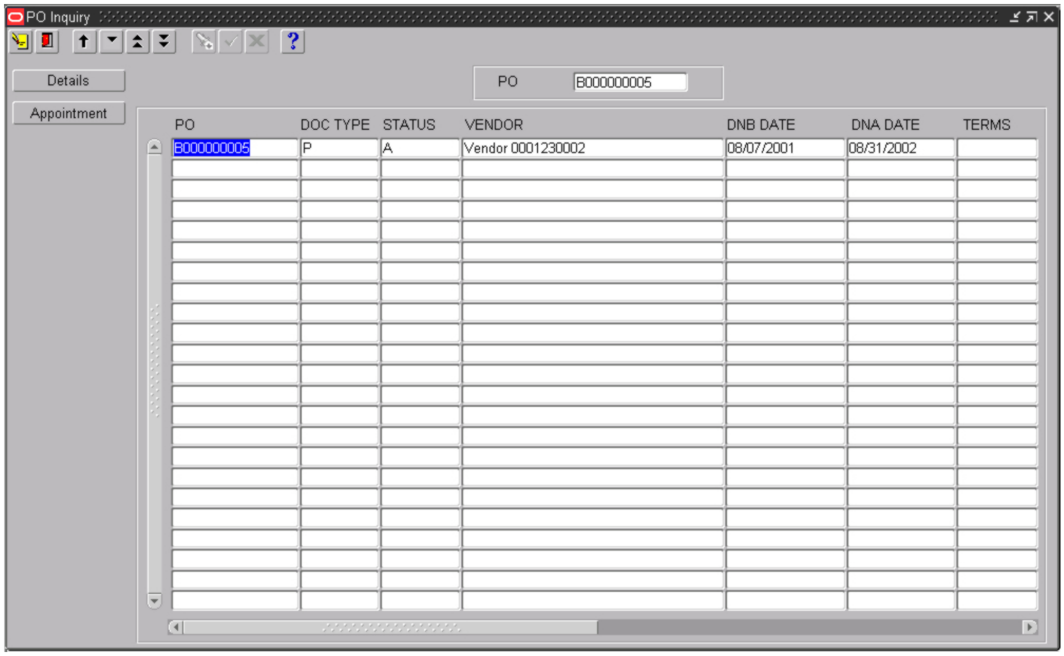
**4.** Click the exit  button to close the ASN Detail Inquiry window.

## Exit the ASN Inquiry Window

- Click the exit  button to close the window.

# View Purchase Orders

**Navigate:** From the main menu, select Appointments > PO Inquiry. The PO Inquiry window opens.




**PO Inquiry Window**

## Display all Purchase Orders

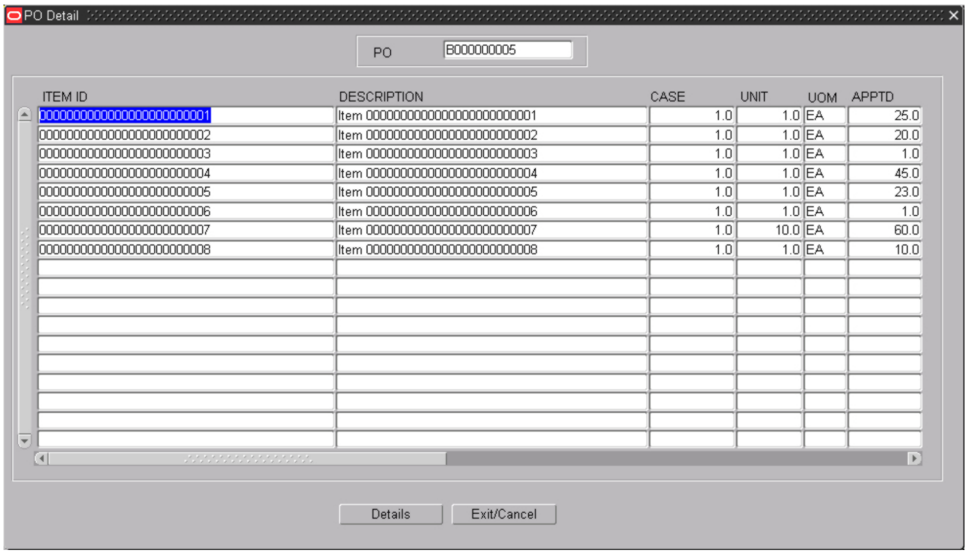
- Click the execute query button.

## Display one Purchase Order

1. If any purchase orders are currently displayed, click the clear button.
2. Click the enter query button.
3. In the PO query field, enter a purchase order number, or click the LOV button and select the purchase order.
4. Click the execute query button. The selected purchase order opens.

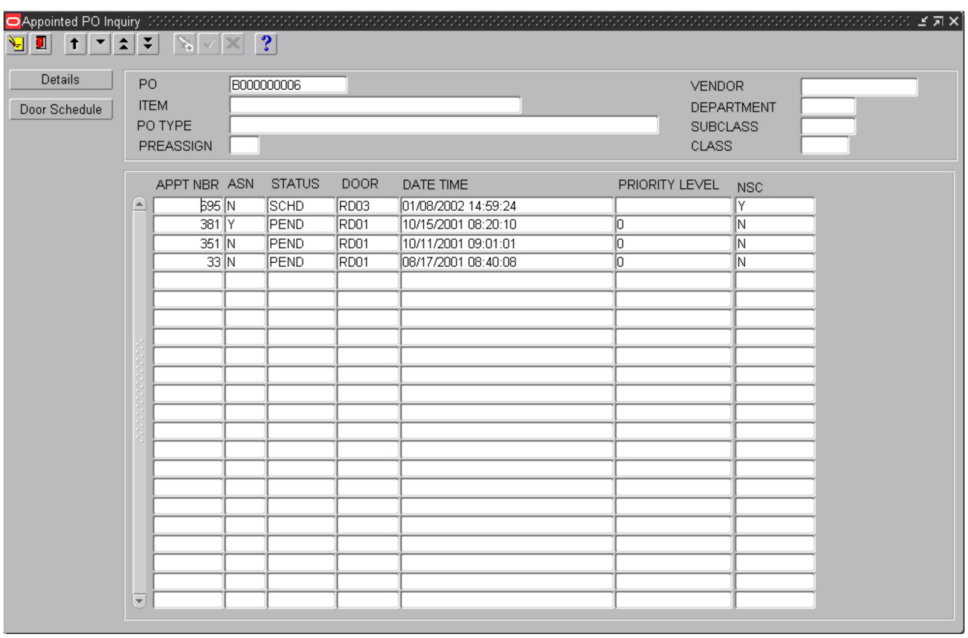
## View the Details of a Purchase Order

5. On the PO Inquiry window, select the purchase order that you want to view in detail.
6. To view the items on the purchase order:
   a. Click **Details**. The items appear in the PO Detail window.




**PO Detail Window**

   b. Click **Exit/Cancel** to close the PO Detail window.
7. To view appointments that are associated with the purchase order:
   a. Click **Appointment**. The appointments appear in the Appointed PO Inquiry window.



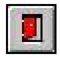

**Appointed PO Inquiry Window**

   b. Click the exit  button to close the Appointed PO Inquiry window.

## Display Full Detail

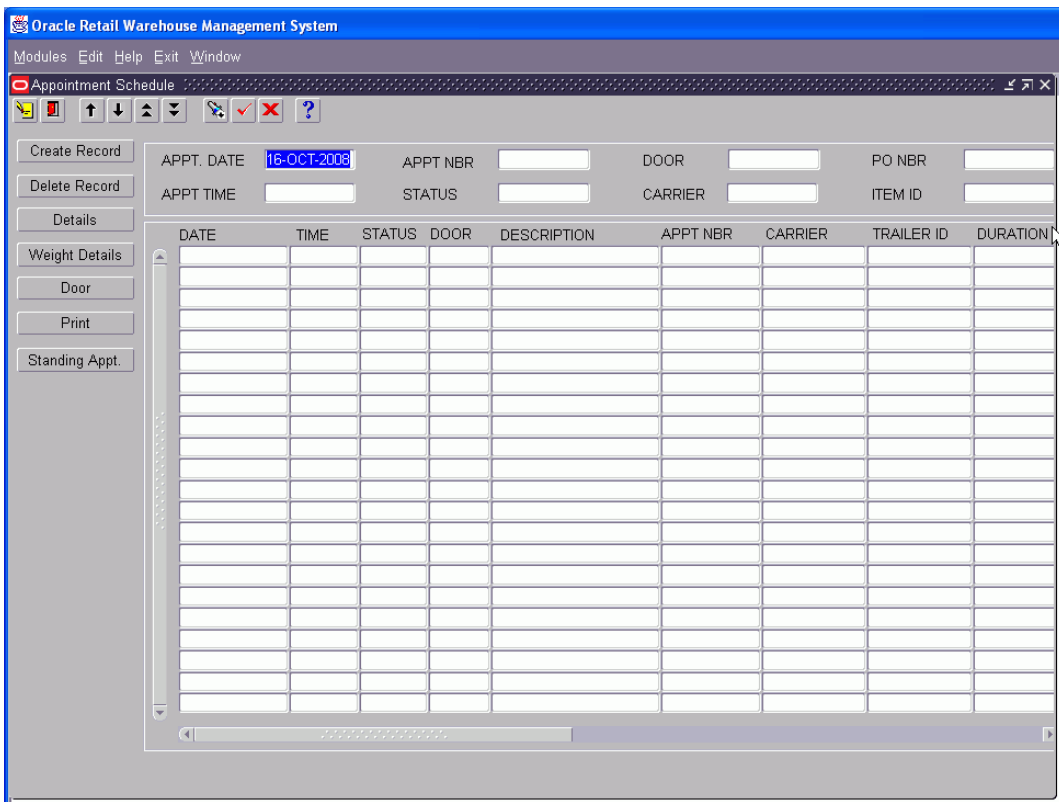
To view the instructions for an appointment code in a separate window, select the code and click **Display Full**.

## Exit the PO Inquiry Window

- Click the exit  button to close the window.

# Maintain Appointment Schedules

**Navigate:** From the main menu, select Appointments > Appointment Schedule. The appointments for the current date appear in the Appointment Schedule window.




**Appointment Schedule window**

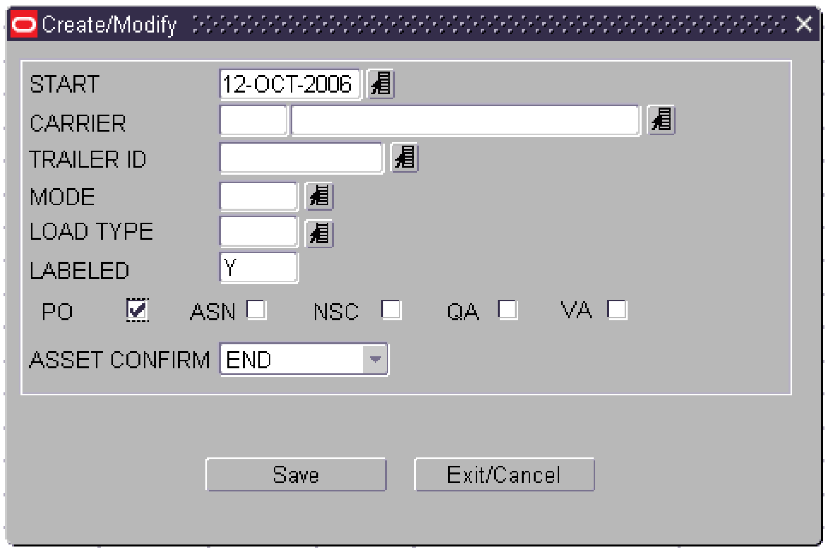
## Display Appointments by Date

1. If any appointments are currently displayed, click the clear  button.
2. In the Appointment Date query field, enter a date or click the calendar  button and select the date. The appointments for the selected date appear.

## Edit an Appointment

**Note:** An appointment with a status of Received may not be edited.

1. On the Appointment Schedule window, double-click the appointment that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

## Add an Appointment

1. On the Appointment Schedule window, click **Create Record**. The Create/Modify window opens.
2. In the Start field, edit the default date and time as necessary.

**Note:** If you do not enter a receiving door, the appointment is saved as an unscheduled appointment.

3. In the Carrier field, enter the carrier code, or click the LOV button and select the carrier.
4. In the Trailer ID field, enter the ID of the trailer, or click the LOV button and select the trailer.

**Note:** If you enter a new trailer ID, it is automatically added to the system.

5. In the Door field, enter the ID of the receiving door, or click the LOV button and select the door.
6. In the Type field, enter the delivery mode for the trailer. The type may be Live (L), Dropped off (D), or Unknown (X).
7. In the Duration field, enter the number of hours unloading is expected to last.

8. If the appointment is based on an ASN, enter Y (Yes) in the ASN field.
9. If the appointment is for non-specified casepacks (NSC), select the NSC check box.
10. If quality assurance or vendor audit checks are to be performed on the appointment at the style level, select the QA and VA check boxes as necessary.

> **Note:** You can enter the sampling percentages when you edit the details of an appointment. If the check boxes are not selected, the vendor's default sampling percentages are used by the system.

From the Asset Confirm field, select Start, During, or End.

11. Click **Save** to save the changes and close the Create/Modify window.

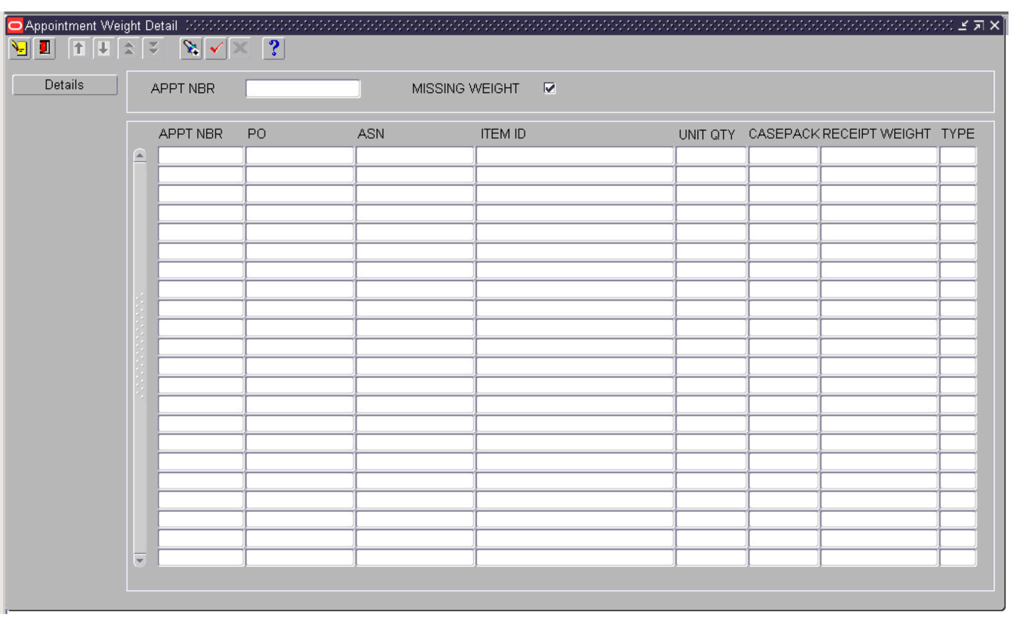
## Add or Edit Details on an Appointment

1. On the Appointment Schedule window, select the appointment that you want to edit.
2. Click **Details**. Depending on the type of appointment, either the Appointment ASN, Appointment Detail, or NSC Appointment Detail window opens.
3. Edit the details as necessary:
   - Maintain ASN/non-NSC type appointments.
   - Maintain non-ASN/non-NSC type appointments.
   - Maintain NSC type appointments.

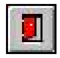
## Enter Appointment Weight Details

> **Note:** This window can also be accessed from the main menu, select Appointments > Appointment Weight Detail.

1. On the Appointment Schedule window, select the appointment that you want to weight details for.
2. Click **Weight Details**. The Appointment Weight Detail window opens.




**Appointment Weight Detail Window**

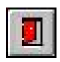
3. Double click on the record you want to update. The Create/Modify window opens.
4. In the Receipt Weight field, enter the weight of the item.
5. Click **Save** to save the changes and close the window.
6. Click the exit  button to close the window.

## Delete an Appointment

> **Note:** An appointment may be deleted if 1) labels have not been printed or 2) the merchandise has been received and reconciled for the appointment.

1. On the Appointment Schedule window, select the appointment that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

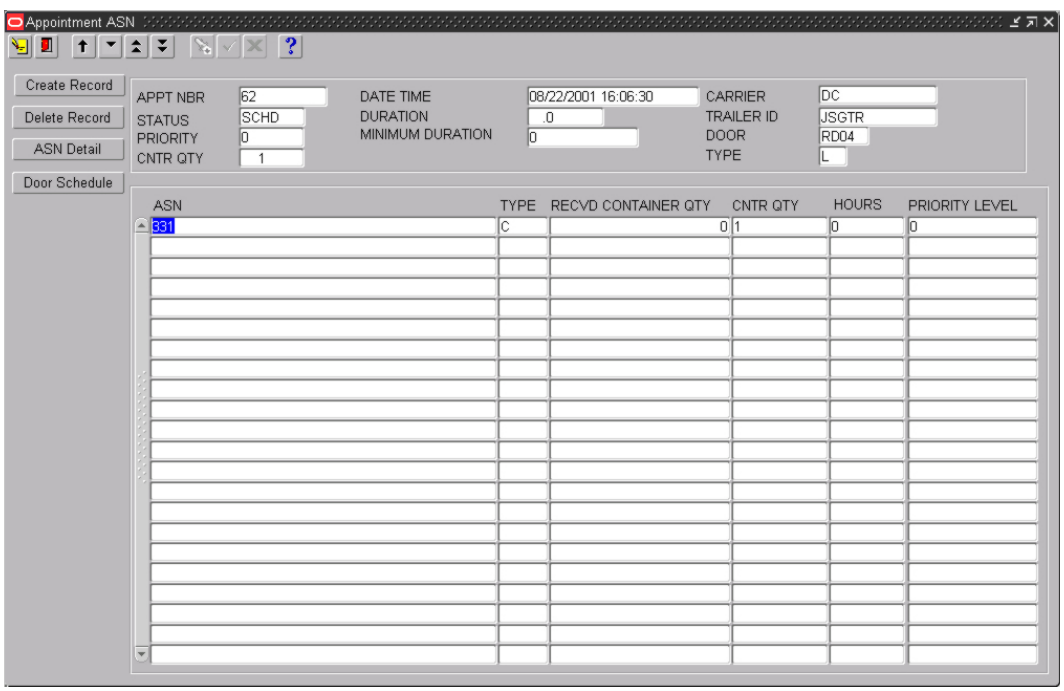
## Exit the Appointment Schedule Window

- Click the exit  button to close the window.

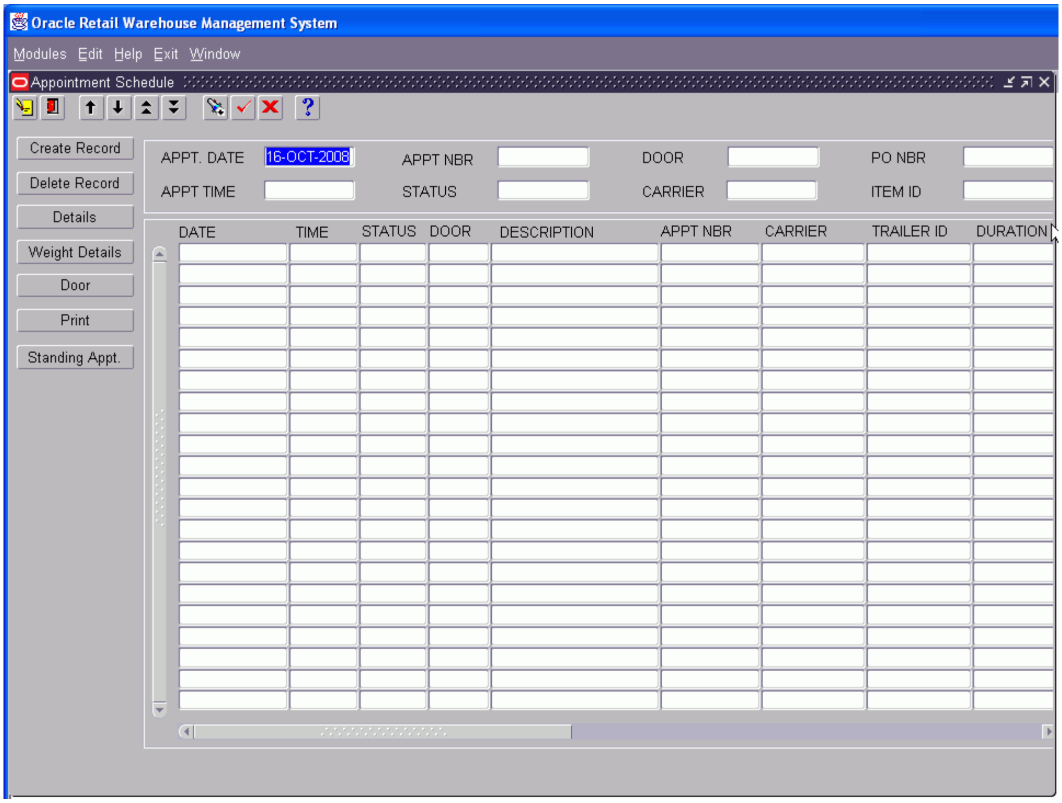
# Maintain ASN/Non-NSC Type Appointments

**Navigate:** From the main menu, select Appointments > Appointment Schedule. The appointments for the current date appear in the Appointment Schedule window.

Search for and select an appointment that has an ASN and the NSC check box is cleared. Click **Details**. The details appear in the Appointment ASN window.




**Appointment ASN Window**



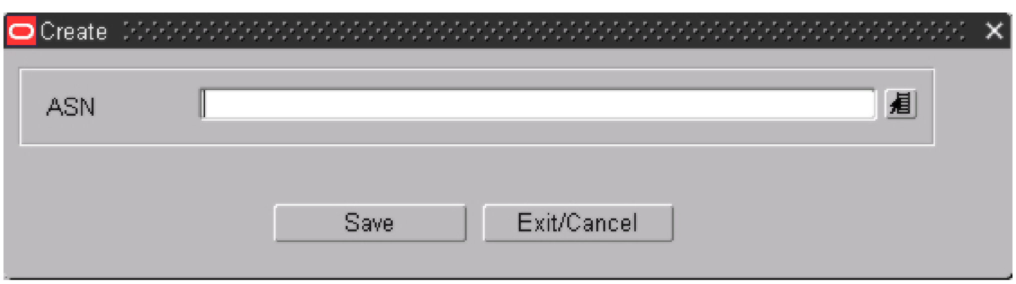

**Appointment Schedule window**

> **Note:** You can access the Appointment ASN window from the Appointment Schedule, Appointment ASN, and Appointed PO Inquiry windows. You can also choose Appointments > Appointment ASN from the main menu.

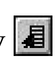
## Add an ASN to an Appointment

> **Note:** Only container type ASNs may be added.

1. On the Appointment ASN window, click **Create Record**. The Create window opens.



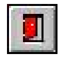

**Create Window**

2. In the ASN field, enter the ASN number, or click the LOV  button and select the ASN.
3. Click **Save** to save the changes and close the Create window.

### Delete an ASN from an Appointment

1. On the Appointment ASN window, select the ASN that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

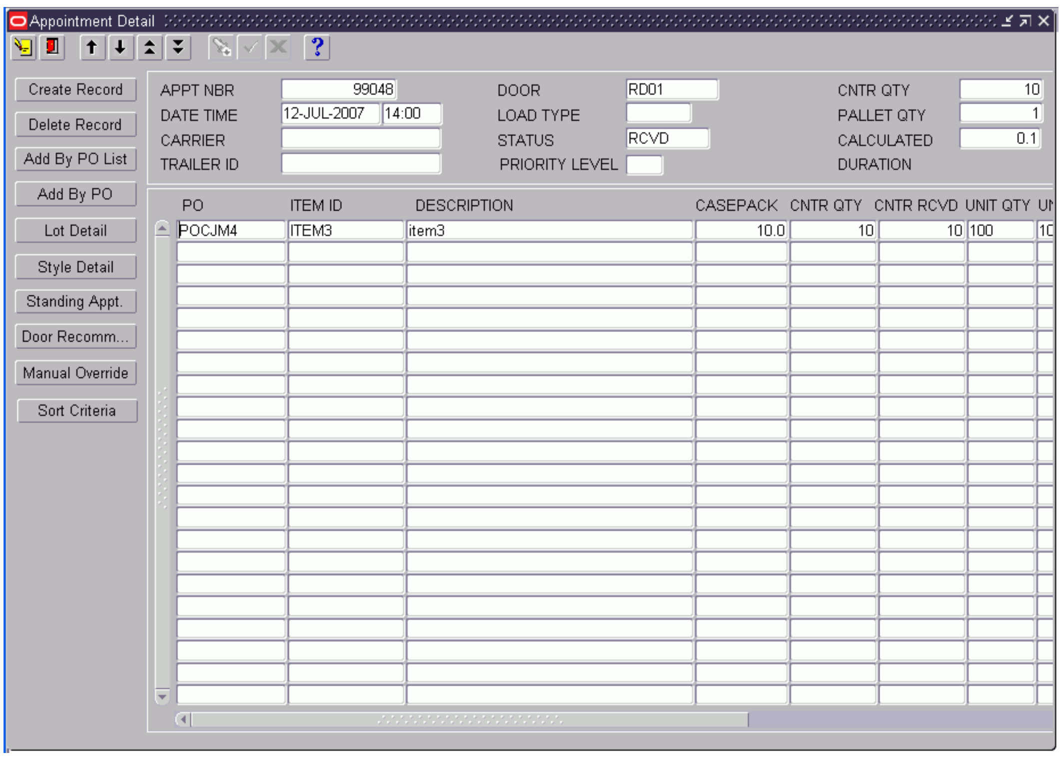
### Exit the Appointment ASN Window

- Click the exit  button to close the window.

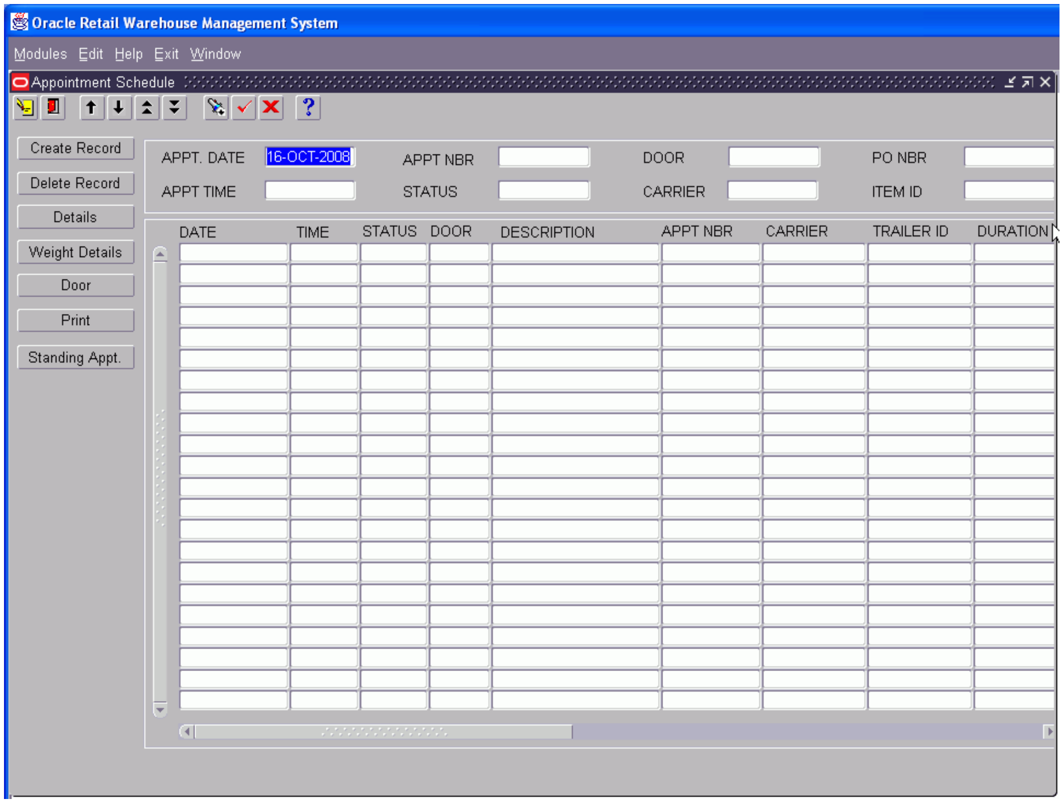
## Maintain Non-ASN/Non-NSC Type Appointments

**Navigate:** From the main menu, select Appointments > Appointment Schedule. The appointments for the current date appear in the Appointment Schedule window.

Search for and select an appointment has no ASN and the NSC check box is cleared. Click **Details**. The details appear in the Appointment Detail window.




**Appointment Detail Window**




**Appointment Schedule Window**

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**Note:** You can access the Appointment Detail window from the Appointment Schedule, Appointment ASN, and Appointed PO Inquiry windows. You can also choose Appointments > Appointment Detail from the main menu.

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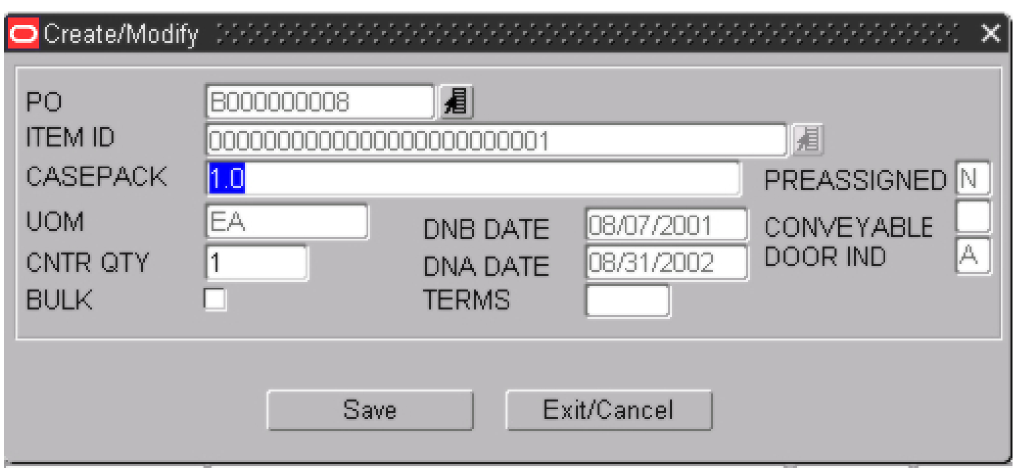
## Edit a PO/Line Item on an Appointment

1. On the Appointment Detail window, double-click the PO/line item that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.

3. Click **Save** to save any changes and close the Create/Modify window.

## Add a PO/Line Item to an Appointment

1. On the Appointment Detail window, click **Create Record**. The Create/Modify window opens.
2. In the PO field, enter the purchase order number, or click the LOV button and select the purchase order.
3. In the Item field, enter the ID of the item, or click the LOV button and select the item.
4. In the Casepack field, enter the number of units per container.
5. If the item will be received on bulk pallets, select the Bulk check box.
6. Click **Save** to save the changes and close the Create/Modify window.

## Add a PO List to an Appointment

1. On the Appointment Detail window, click **Add by PO List**. The Add by PO List window opens.

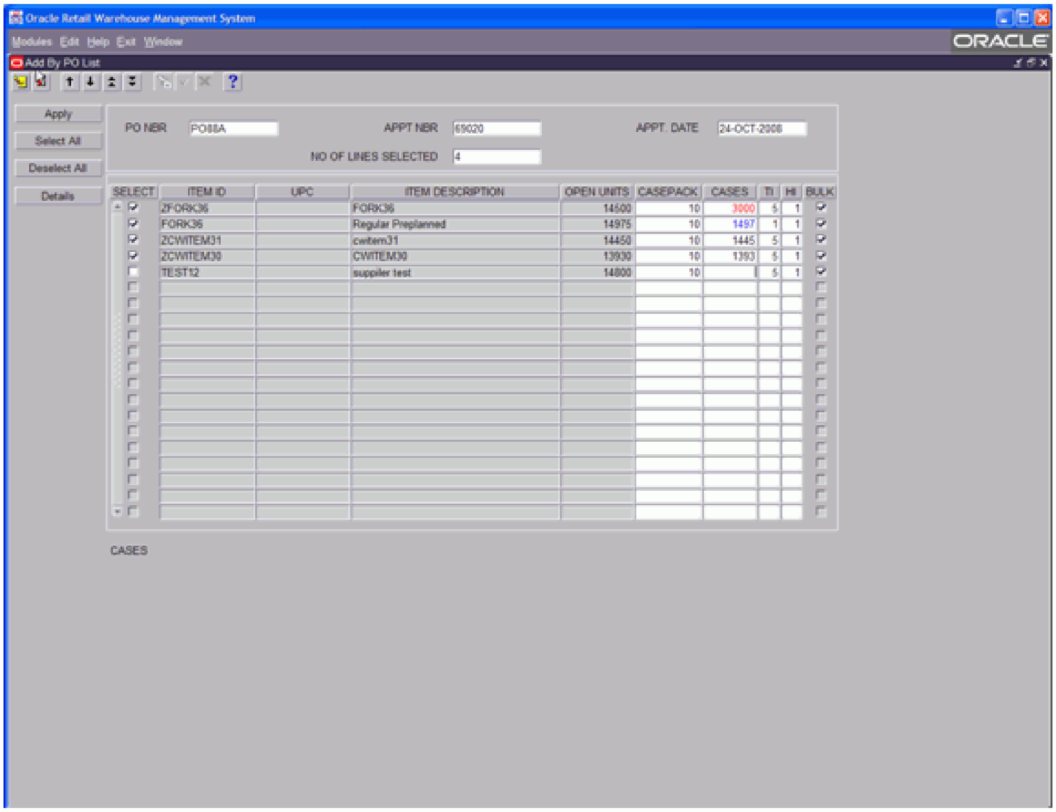
   **Note**: In the Add by PO List window, click the column header to sort the values in ascending or descending order. If the columns are sorted, the rows with "Null" value are not sorted and remain at the bottom.

2. In the **PO NBR** field, enter the purchase order number, or click the LOV button and select the purchase order.
3. Click **Select All**. All the rows under the **SELECT** column are selected. In addition, the **CASES** column is populated with the current values in the "Open Cases Quantity" for all the rows that were not previously selected. This option is applied only to the rows that are not selected. Any rows that were already selected prior to pressing this button are not affected. This is to preserve any value entered by the user in the **CASES** quantity field.

   **Note:** Open Cases Quantity is determined by OPEN UNITS / CASEPACK. The Open Units = PO ordered units minus (PO detail received units + all open appointment unreceived units).

4. If an "Open Cases Quantity" calculation results in a non-whole number of cases, the default quantity is always corrected to a lower number. For example, if the calculation for open cases quantity yields 23.8, the default quantity that is displayed would be 23. When this happens, the number is displayed in blue font on the screen.
5. If the user-entered value in the CASES column (overrides the default) exceeds the open cases quantity plus the allowable tolerance, an error message is displayed. The warning is either a hard stop or soft warning and depends on the SCP.recv_tolerance_unit parameter. If it is a soft warning, the entered quantity is displayed in red font. The amount of tolerance is configured on the Item Supplier table (tolerance_pct column). In case, the user-entered quantity in the CASES column (overrides the default) exceeds the open cases quantity, an error message is displayed and the quantity is displayed in red font.
6. Click **DE-SELECT ALL** to set the values in the "CASES" column to Null. Also the **CASEPACK** column is reset to its original value (PO_DETAIL.ordered_casepack).

7. Select the **SELECT** check box to change/enter the value for the items in the CASES column.
8. The only fields that can be edited are: **SELECT**, **CASEPACK**, **CASES**, **TI**, **HI**, and **BULK** flag.
9. If the items are to be received as the bulk pallets, select the **BULK** check box.
10. Click **Apply** to include the item/items in the appointment. Click **Apply** to add the items to the appointment for the current PO before adding another PO to the appointment.

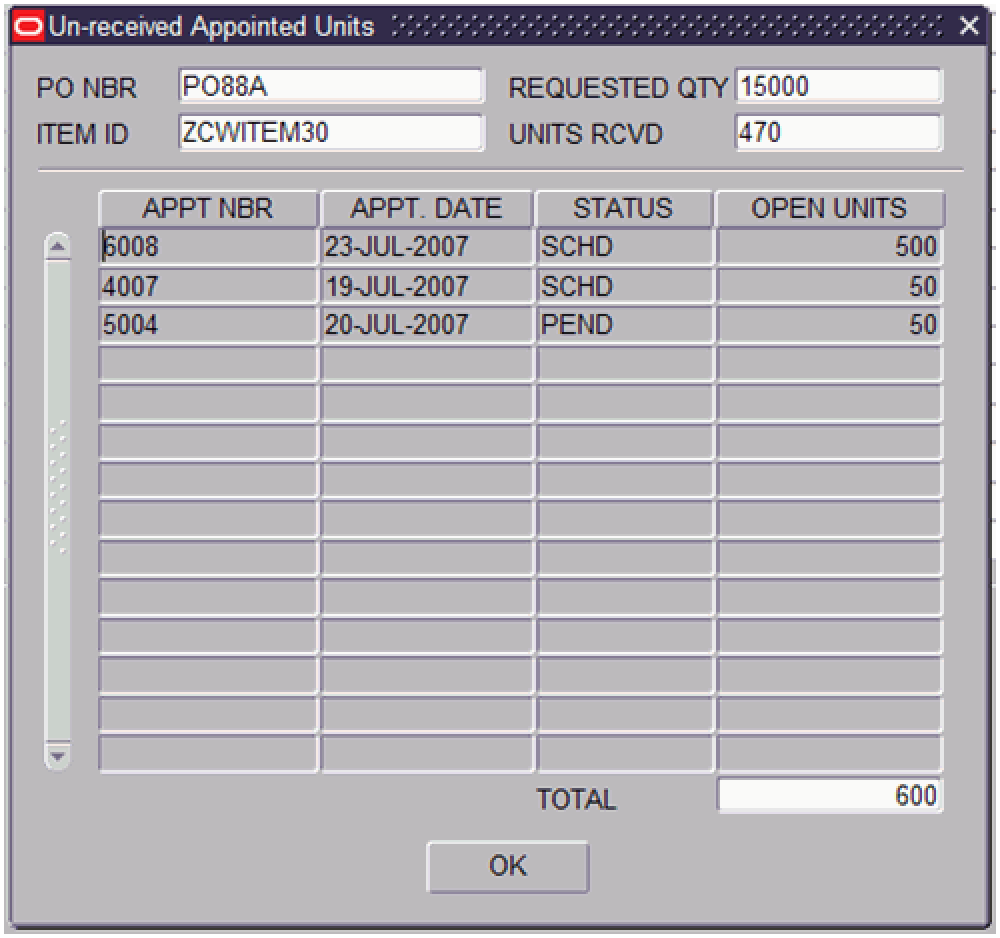


**Add by PO List window**

### Un-receive Appointed Units

A detailed pop-up screen has been included to supply the user with details about previous appointments for any PO line on the new Add by PO List screen.

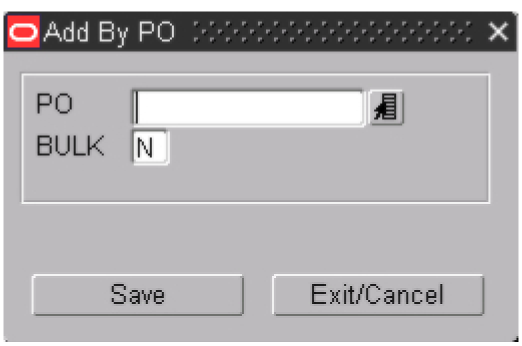
1. Double clicking any row in the 'Add By PO List' form will open the 'Un-received Appointed Units' window. The details for all appointments with that PO/Item combination are displayed.
2. Click a row in the Add by PO List screen and then click the "Details" button to display the Un-received appointed window.




**Un-received Appointed Units**

## Add a Purchase Order to an Appointment

1. On the Appointment Detail window, click **Add by PO**. The Add by PO window opens.




**Add by PO Window**

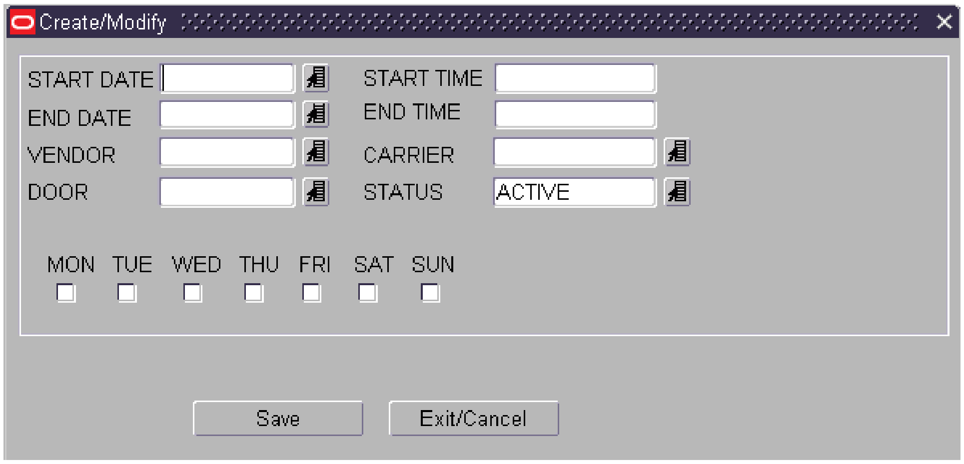
2. In the PO field, enter the purchase order number, or click the LOV  button and select the purchase order.
3. If the items will be received on bulk pallets, select the Bulk check box.
4. Click **Save** to save the changes and close the Create/Modify window.

## Delete a PO/Line Item from an Appointment

1. On the Appointment Detail window, select the PO/line item that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Add a Standing Appointment

1. On the Appointment Detail window, select the PO/line item that you want to add.
2. Click **Standing Appt**. The Door Time Slot Selection window opens.

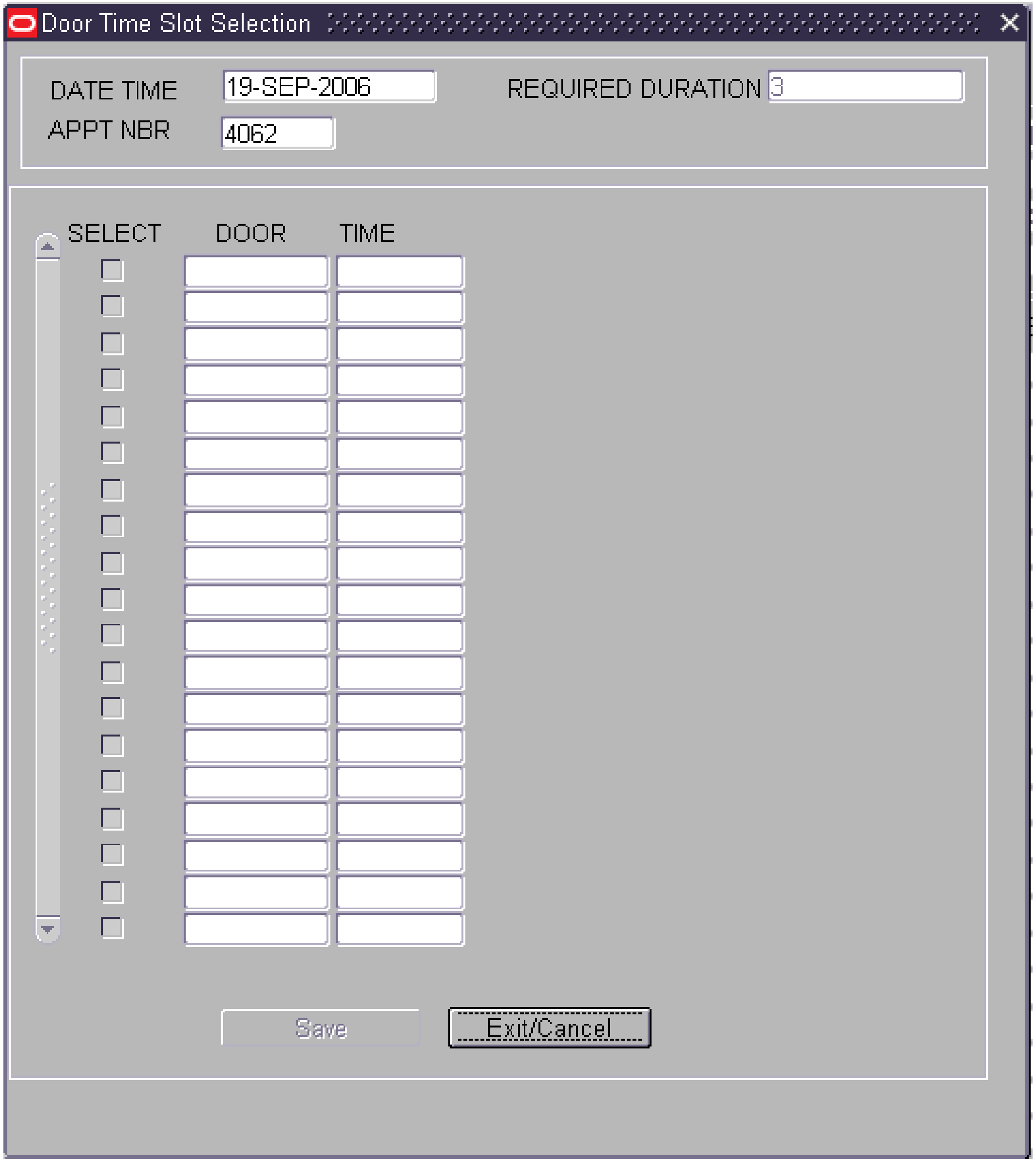



**Door Time Slot Selection window**

3. Select a door.
4. Click **Save** to save the changes and close the Door Time Slot Selection window.

## Receive a Door Recommendation

1. On the Appointment Detail window, select the PO/line item that you want to receive.
2. Click **Door Recommendation**. The Door Time Slot Selection window opens.

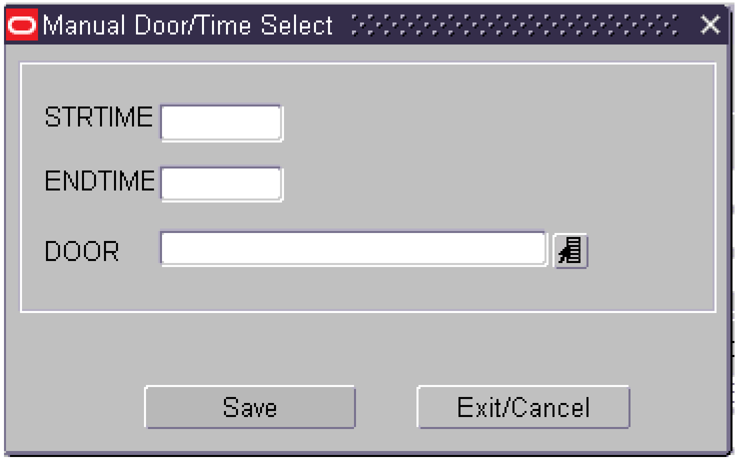



**Door Time Slot Selection window**

3. Select a door.
4. Click **Save** to save the changes and close the Door Time Slot Selection window.

## Set a Manual Override

1. On the Appointment Detail window, select the PO/line item that you want to set.
2. Click **Manual Override**. The Manual Door/Time Slot window opens.

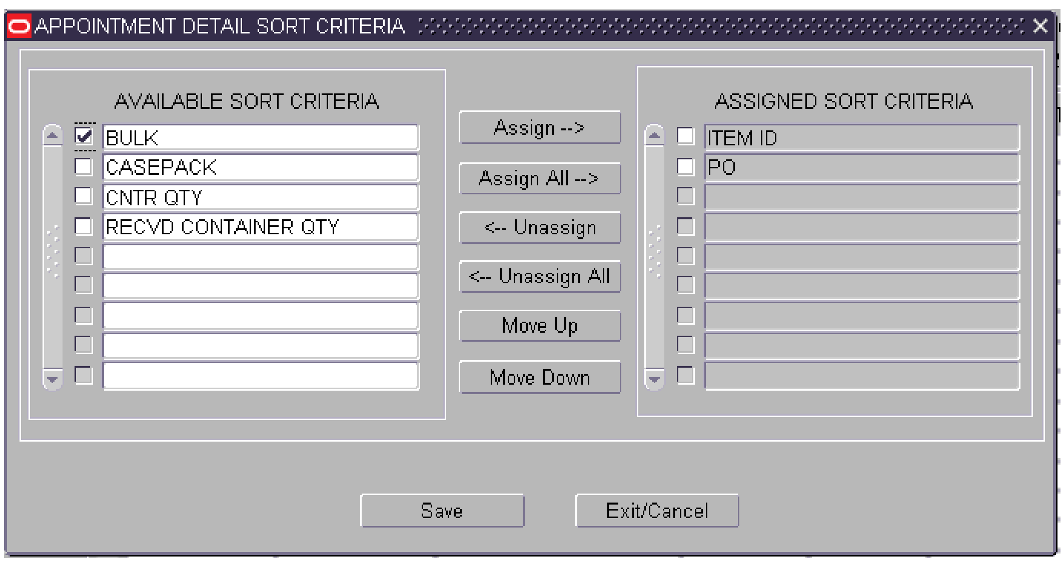



**Manual Door Time Slot window**

3. Select a time or a door.
4. Click **Save** to save the changes and close the Door Time Slot Selection window.

## Sort Appointment Criteria

1. On the Appointment Detail window, select the PO/line item that you want to sort.
2. Click **Sort Criteria**. The Appointment Detail Sort Criteria window opens.

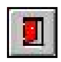



**Appointment Detail Sort Criteria**

3. To assign processes:
   a. Select the check box next to the desired processes on the Available Sort Criteria table.
   b. Click **Assign**. The selected processes are moved to the Assigned Sort Criteria table.

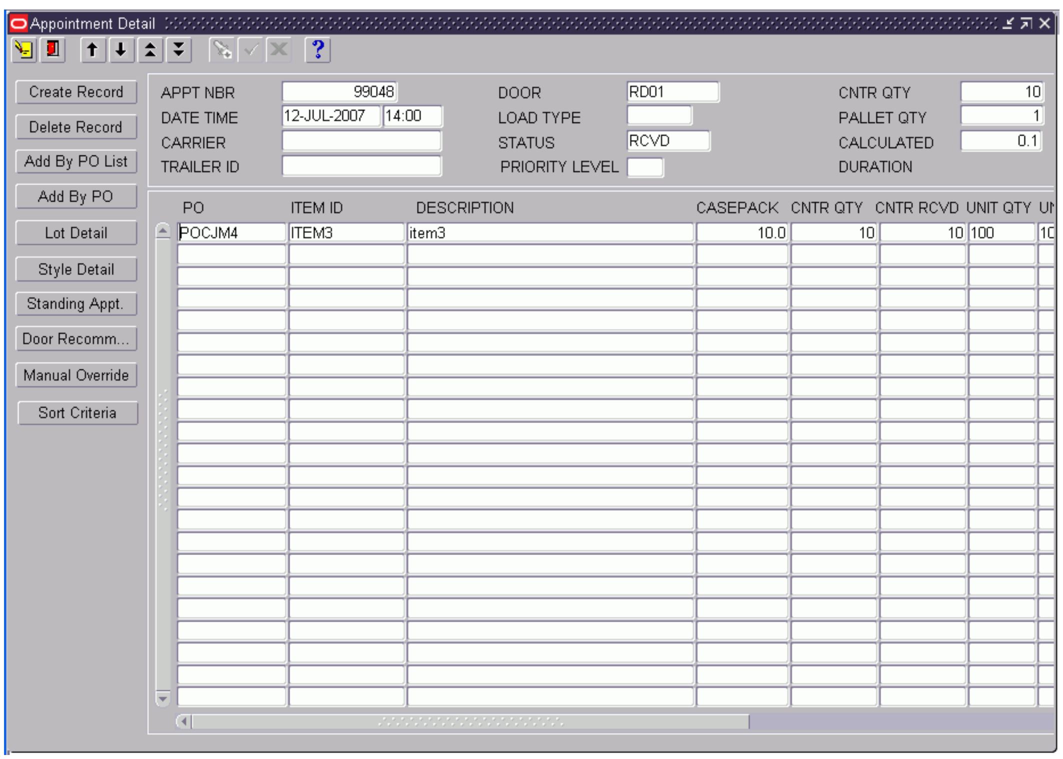
4. To remove assigned processes:
   a. Select the check box next to the desired processes on the Assigned Sort Criteria table.
   b. Click **Unassign**. The selected processes are moved to the Available Sort Criteria table.
5. To resequence the assigned criteria:
   a. Select the criteria to be moved.
   b. To move the criteria closer to the top of the list, click **Move Up**.
   c. To move the criteria closer to the bottom of the list, click **Move Down**.
6. Click **Save** to save the changes and close the Appointment Detail Sort Criteria window.

## Exit the Appointment Detail Window

- Click the exit  button to close the window.

# Maintain Lot Numbers on Appointments

**Navigate:** From the main menu, select Appointments > Appointment Detail. The Appointment Detail window opens.




**Appointment Detail Window**

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**Note:** You can also access this window from the Appointed PO Inquiry, Appointment Schedule, an Unscheduled Appointment Inquiry windows.

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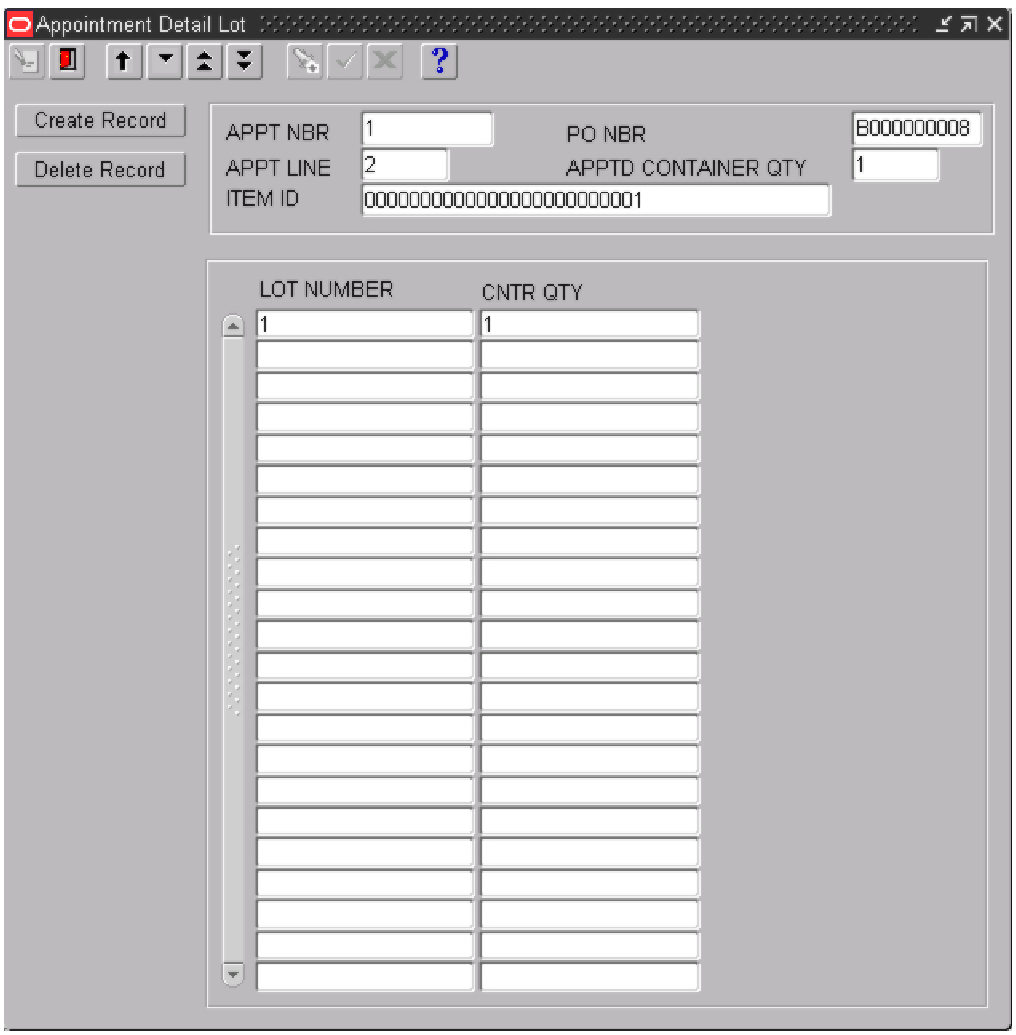
## Display a Non-ASN/Non-NSC Type Appointment

1. If an appointment is currently displayed, click the clear button.
2. Click the enter query button.
3. In the Appt Nbr query field, enter the appointment number, or click the LOV button and select the appointment.
4. Click the execute query button. The PO/line items that are associated with the selected appointment appear.

## Add Lot Numbers to an Appointment

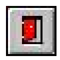
1. On the Appointment Detail window, select the PO/line item that you want to edit.
2. Click **Lot Detail**. The Appointment Detail Lot window opens.



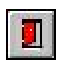

**Appointment Detail Lot Window**

3. Click **Create Record**. The Create/Modify window opens.


**Create/Modify Window**

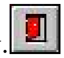
4. In the Lot Number field, enter the lot number.
5. In the In the Cntr Qty field, enter the number of containers that you want to associate the lot number with.
6. Click **Save** to save the changes and close the Create/Modify window.
7. Click the exit  button to close the Appointment Detail Lot window.

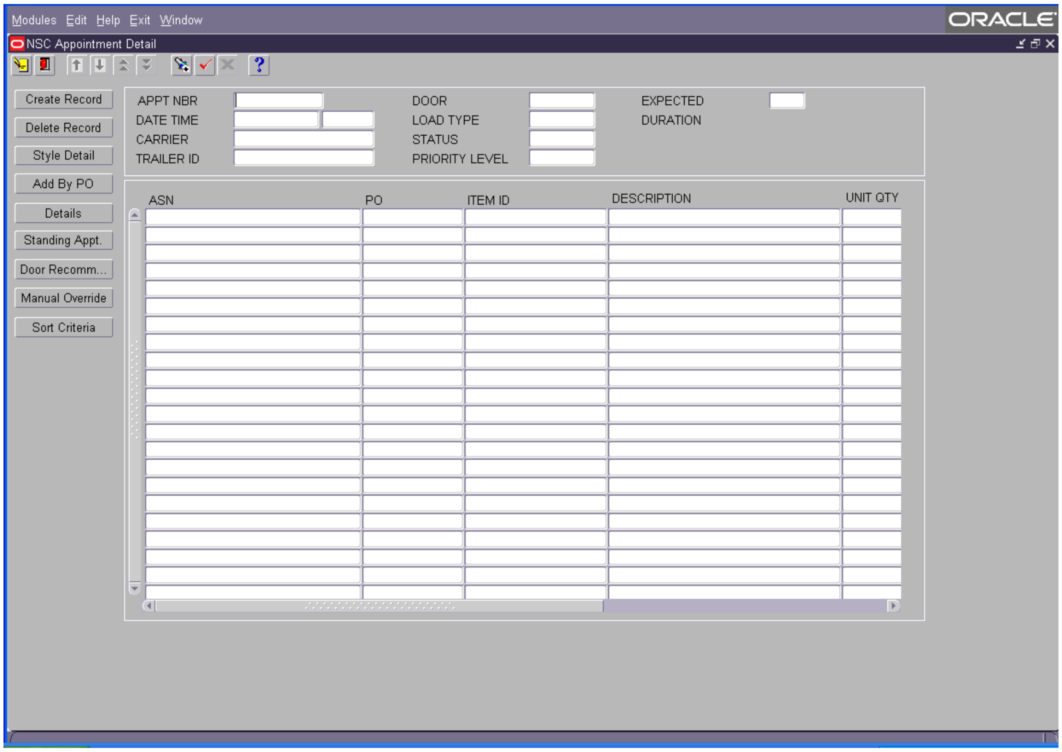
## Edit a Lot Number on an Appointment

1. On the Appointment Detail window, select the PO/line item that you want to edit.
2. Click **Lot Detail**. The Appointment Detail Lot window opens.
3. Double-click the lot number that you want to edit. The Create/Modify window opens.
4. Edit the container quantity as necessary.
5. Click **Save** to save any changes and close the Create/Modify window.
6. Click the exit  button to close the Appointment Detail Lot window.

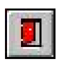
## Delete a Lot Number from an Appointment

1. On the Appointment Detail window, select the PO/line item that you want to edit.
2. Click **Lot Detail**. The Appointment Detail Lot window opens.
3. Select the lot number that you want to edit.
4. Click **Delete Record**.
5. When prompted to delete the record, click **Yes**.

6. Click the exit button to close the Appointment Detail Lot window.



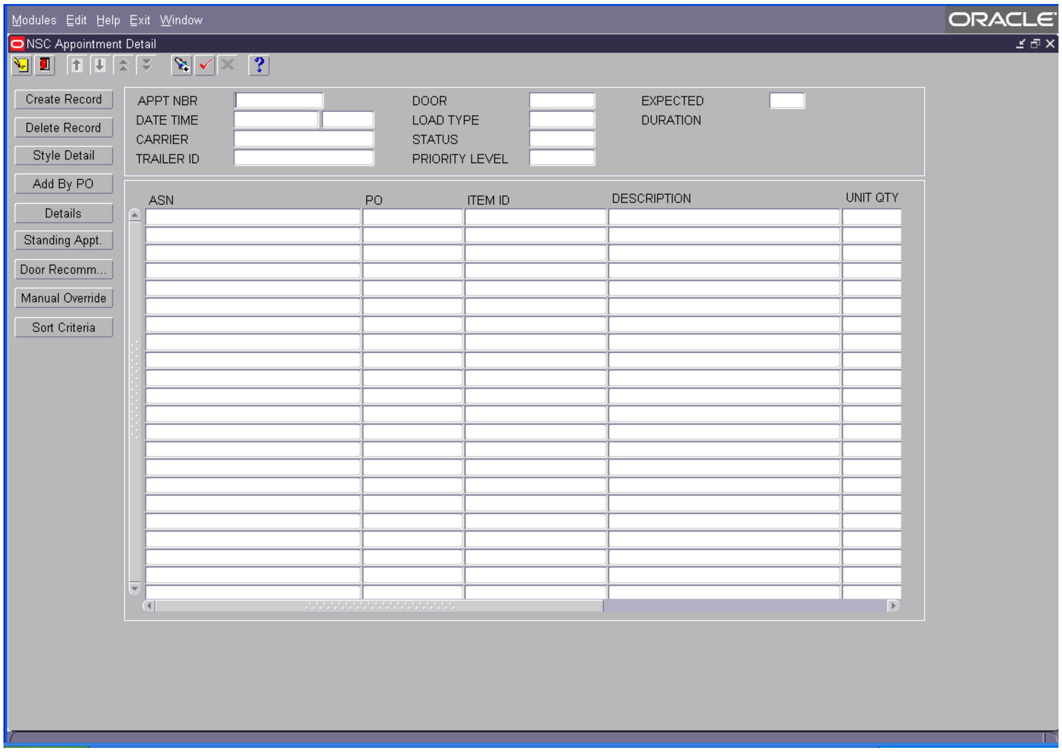

## Exit the Appointment Detail Window

- Click the exit  button to close the window.

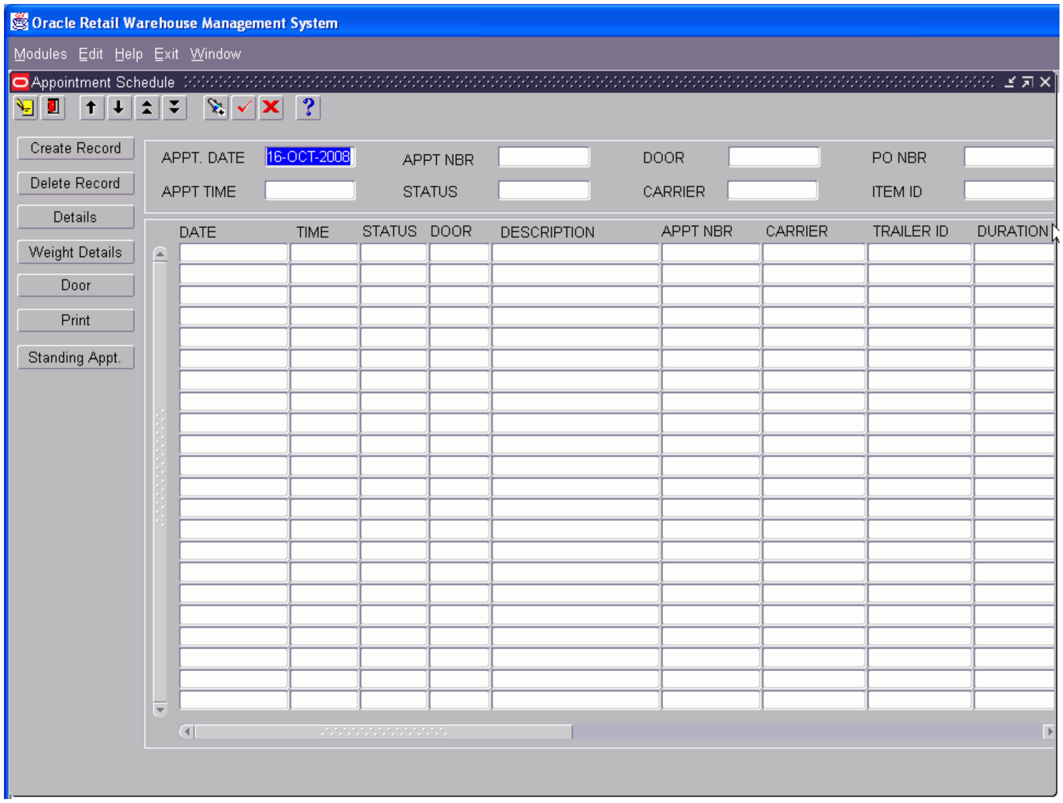
# Maintain NSC Type Appointments

**Navigate:** From the main menu, select Appointments > Appointment Schedule. The appointments for the current date appear in the Appointment Schedule window.

Search for and select an appointment where the NSC check box is selected. Click **Details**. The details appear in the NSC Appointment Detail window.




**NSC Appointment Detail Window**




**Appointment Schedule Window**

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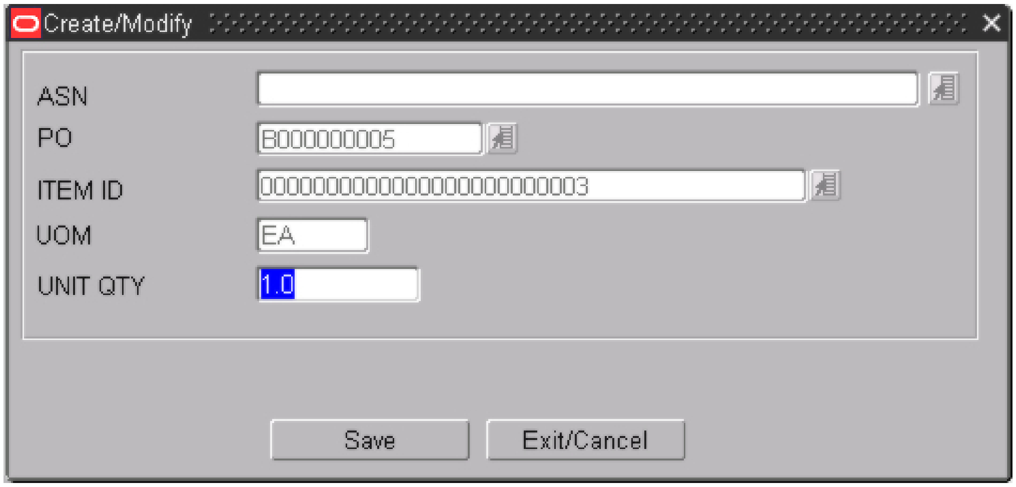
**Note:** You can access the NSC Appointment Detail window from the Appointment Schedule, Appointed PO Inquiry, and Appointment Details windows. Alternatively, you can access NSC Appointment Detail window from the main menu. Select Appointments > NSC Appointment detail.

---

## Add an ASN to an Appointment

> **Note:** ASNs may be added to an appointment that is marked as an ASN type appointment.

1. On the NSC Appointment Detail window, click **Create Record**. The Create/Modify window opens.

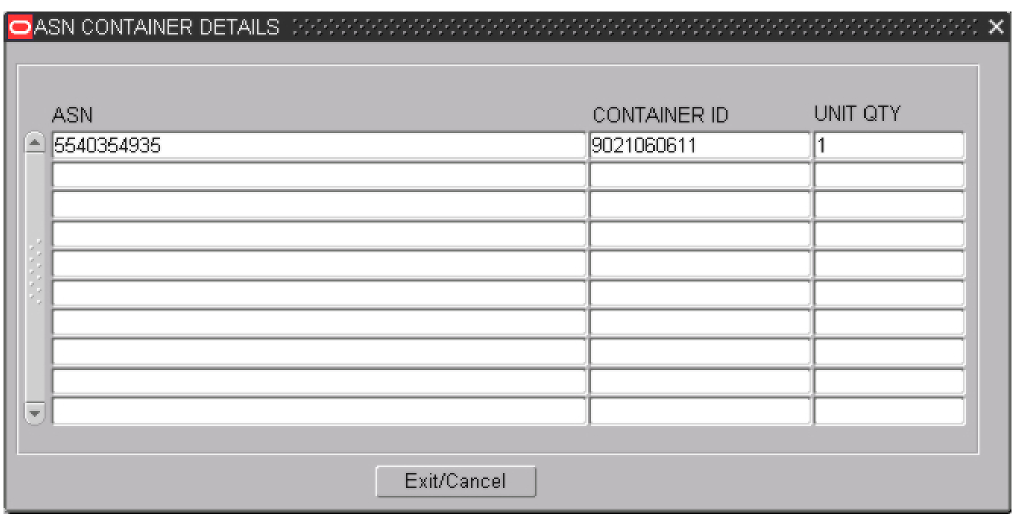



**Create/Modify Window**

2. In the ASN field, enter the ASN number, or click the LOV  button and select the ASN.
3. Click **Save** to save the changes and close the Create/Modify window.

## View Container Details on an Appointment

1. On the NSC Appointment Detail window, select the ASN that you want to view in detail.
2. Click **Details**. The details of the selected ASN appear in the ASN Container Details window.




**ASN Container Details Window**

3. Click **Exit/Cancel** to close the ASN Container Details window.

## Delete an ASN from an Appointment

> **Note:** Several records may refer to the same ASN. If you select and delete any one of the ASN records, all the records containing the same ASN are deleted.

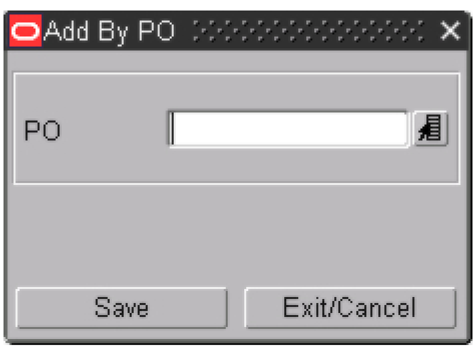
1. On the NSC Appointment Detail window, select the ASN that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Add a PO/Line Item to an Appointment

1. On the NSC Appointment Detail window, click **Create Record**. The Create/Modify window opens.
2. In the PO field, enter the PO number, or click the LOV button and select the PO.
3. In the Item ID field, enter the ID of the item, or click the LOV button and select the item.
4. In the Unit Qty field, enter the number of units.
5. Click **Save** to save the changes and close the Create/Modify window.

## Add a Purchase Order to an Appointment

1. On the NSC Appointment Detail window, click **Add by PO**. The Add by PO window opens.




**Add by PO Window**

2. In the PO field, enter the PO number, or click the LOV button and select the PO.
3. Click **Save** to save the changes and close the Add by PO window.

## Edit a PO/Line Item on an Appointment

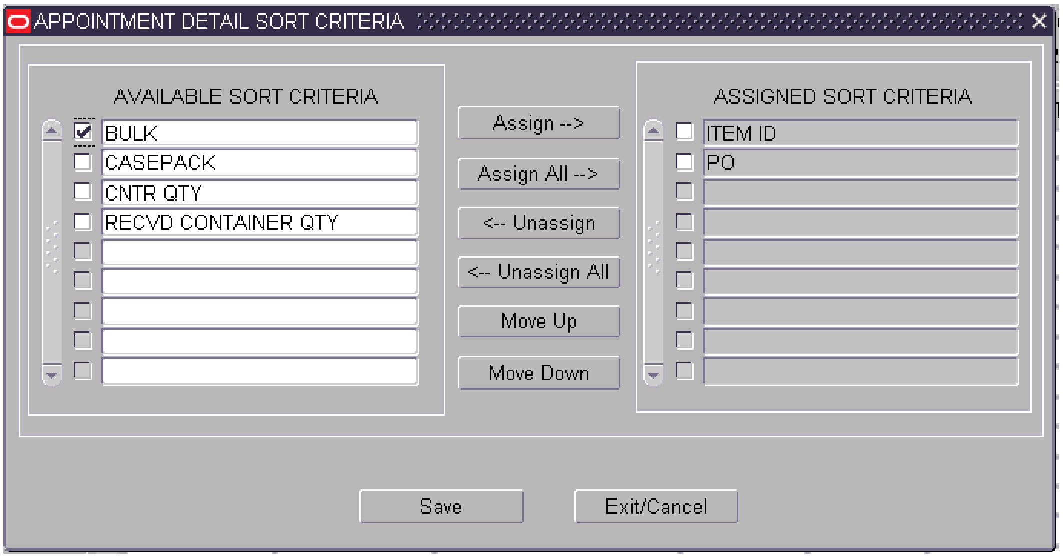
1. On the NSC Appointment Detail window, double-click the PO/line item that you want to edit. The Create/Modify window opens.
2. Edit the unit quantity as necessary.
3. Click **Save** to save the changes and close the Create/Modify window.

## Delete a PO/Line Item from an Appointment

1. On the NSC Appointment Detail window, select the PO/line item that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Sort Appointment Criteria

1. On the NSC Appointment Detail window, select the Appt Nbr.
2. Select the ASN line that you want to sort.
3. Click **Sort Criteria**. The Appointment Detail Sort Criteria window opens.




**Appointment Detail Sort Criteria**

4. To assign processes:
   a. Select the check box next to the desired processes on the Available Sort Criteria table.
   b. Click **Assign**. The selected processes are moved to the Assigned Sort Criteria table.
5. To remove assigned processes:
   a. Select the check box next to the desired processes on the Assigned Sort Criteria table.
   b. Click **Unassign**. The selected processes are moved to the Available Sort Criteria table.
6. To resequence the assigned criteria:
   a. Select the criteria to be moved.
   b. To move the criteria closer to the top of the list, click **Move Up**.
   c. To move the criteria closer to the bottom of the list, click **Move Down**.
7. Click **Save** to save the changes and close the Appointment Detail Sort Criteria window.

## Exit the NSC Appointment Detail Window

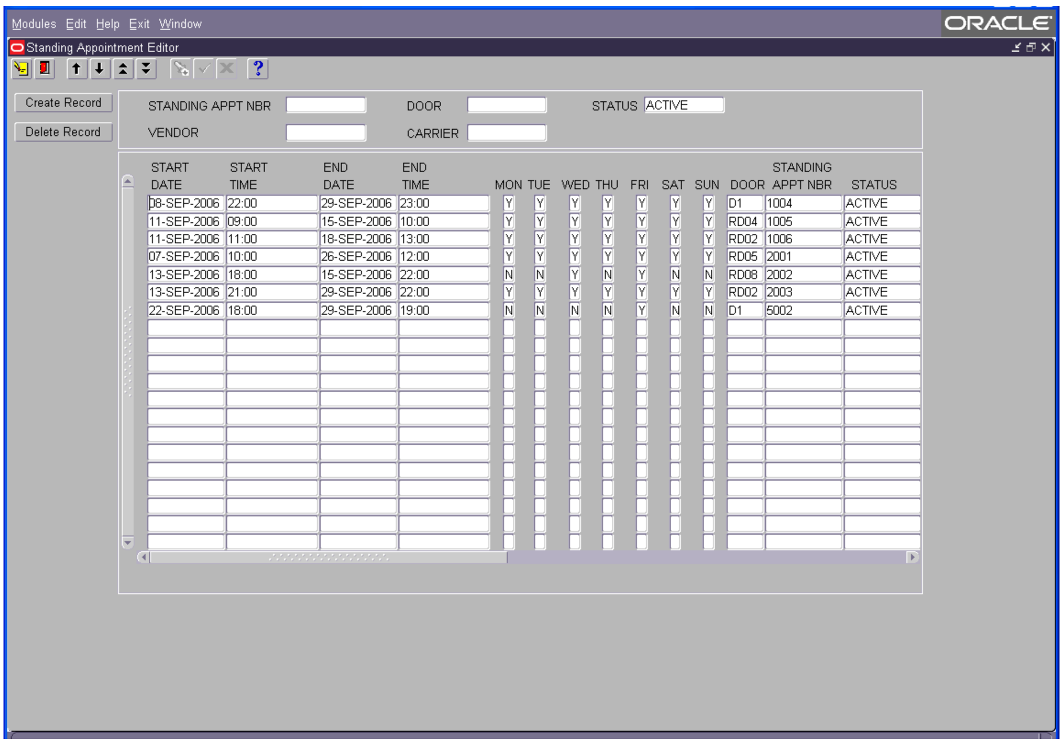
- Click the exit  button to close the window.

# Maintain Standing Appointment  Editor

The purpose of standing appointments is to reserve door/time slots for regular weekly appointments. When the actual delivery information becomes available (for example, PO, items), an appointment can be created by assigning it to one of these "reserved" slots.

- The start and end dates specify the length of time that the standing appointment will be used.
- The start and end times specify the expected duration of these appointments.
- The check boxes for day of the week specify which days will be used for these weekly appointments. (Multiple days may apply, for example, Monday, Wednesday, and Friday every week from noon until 1 p.m.)
- Vendor is a required field and must be selected.
- Carrier is optional; but if specified, the standing appointment will be available only for that vendor/carrier combination.
- New standing appointments created will always be "Active", but this field can be used to deactivate them prior to expiration.

**Navigate:** From the main menu, select Appointments > Standing Appointment Editor. The Standing Appointment Editor window opens.




**Standing Appointment Editor Window**

## Display All Item Fields

- Click the execute query button.

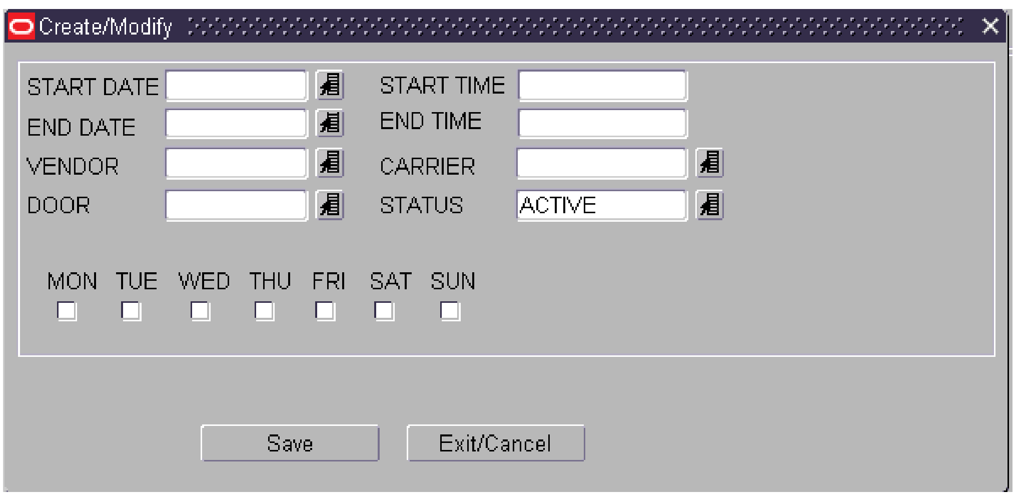
## Display an Item Field

1. If any item fields are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Item Field Name query field, enter the field name, or click the LOV button and select the field.
4. Click the execute query button. The item field that matches the search criterion opens.

## Create a Record

To create a standing appointment:

1. On the Standing Appointment Editor window, click **Create Record** button. The Create/Modify window opens.




**Create/Modify Window**

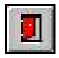
2. Enter required fields.
3. Click **Save**.

## Delete a Record

To delete a standing appointment:

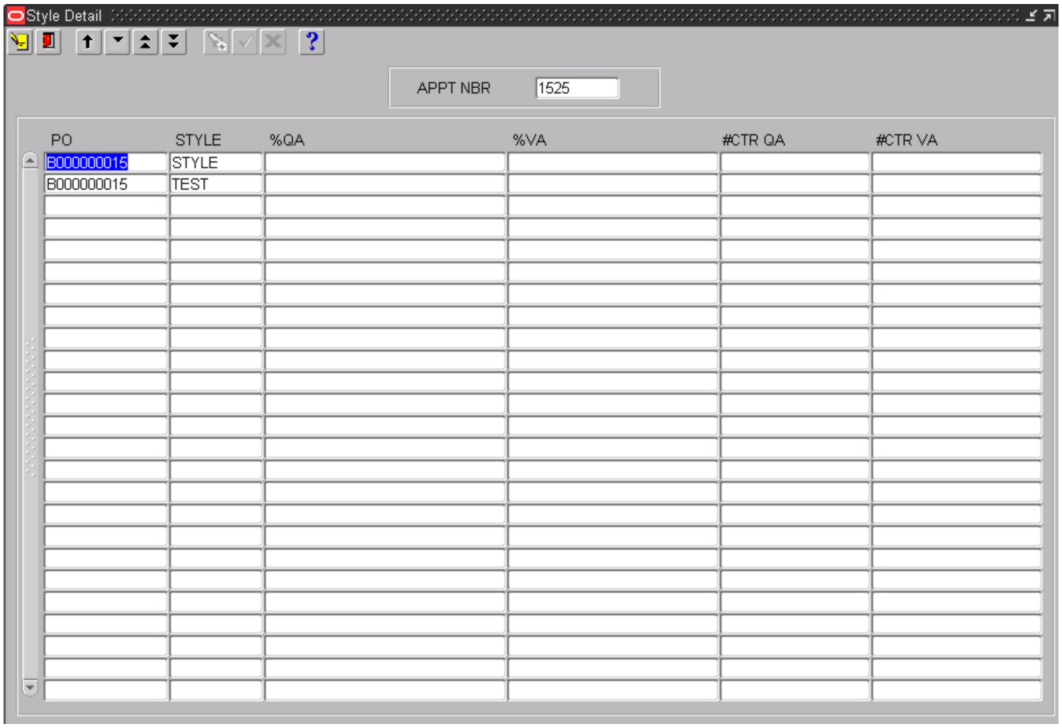
1. On the Standing Appointment Editor window, select the item that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Exit the Standing Appointment Editor Window

- Click the exit  button to close the window.

# Maintain Style Details on Appointments

**Navigate:** From the main menu, select Appointment Schedule. On the Appointment Schedule window, search for and select an appointment where the VA or QA check boxes are selected. Click **Details**. On the detail window that opens, click **Style Detail**. The styles appear in the Style Detail window.

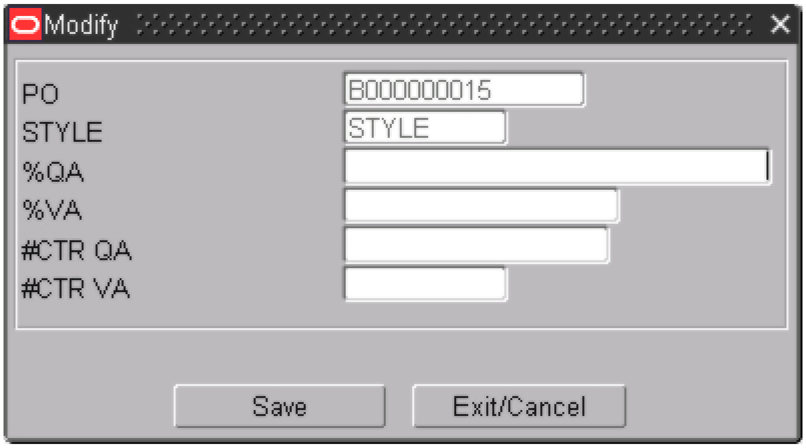



**Style Detail Window**

> **Note:** You can access the Style Detail window from the ASN Detail Inquiry, Appointment Detail, and NSC Appointment Detail windows.

## Edit QA and VA Details for a Style

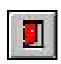
1. On the Style Detail window, double-click the style that you want to edit. The Modify window opens.




**Modify Window**

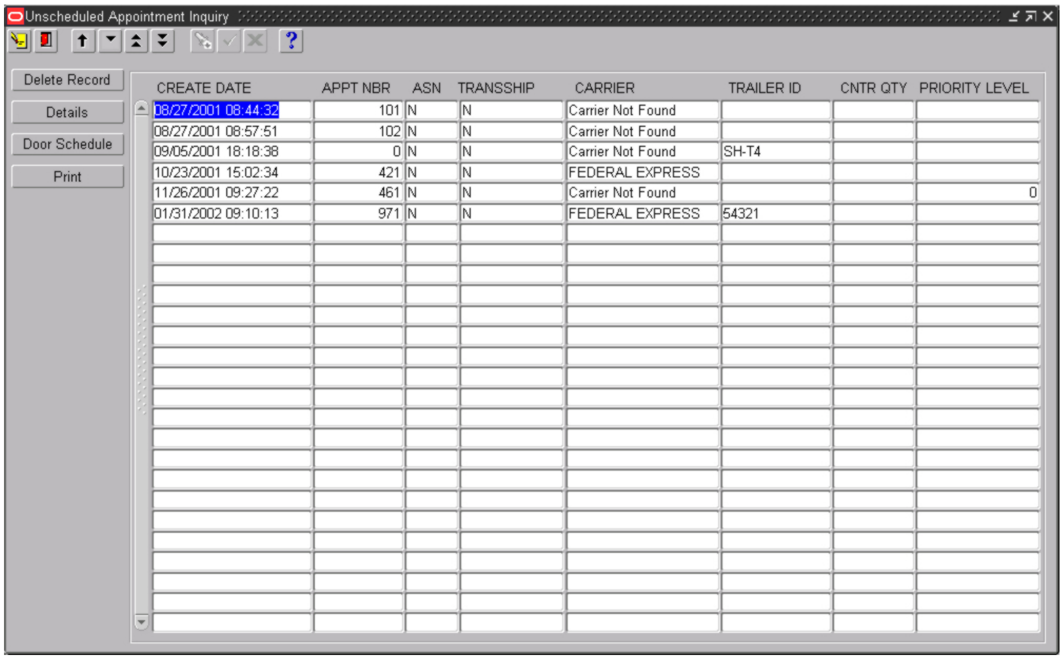
2. In the %QA and %VA fields, enter the percentage of merchandise that must be sampled in each container.
3. In the # Ctr QA and # Ctr VA fields, enter the number of containers to be sampled.
4. Click **Save** to save any changes and close the Modify window.

## Exit the Style Detail Window

- Click the exit  button to close the window.

# Maintain Unscheduled Appointments

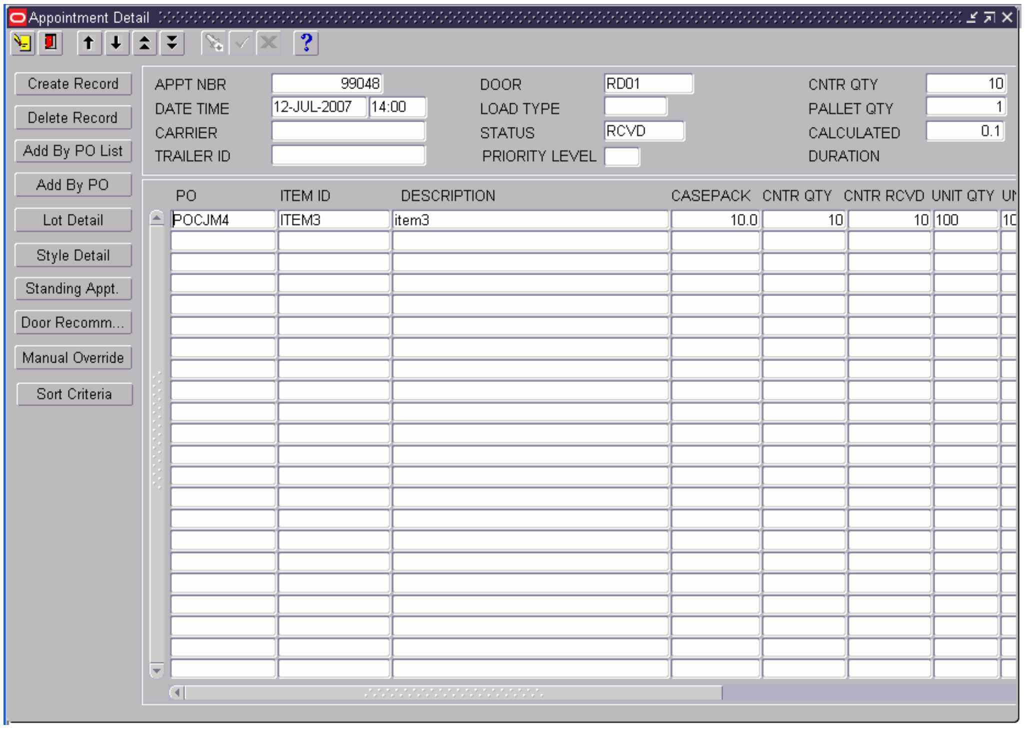
**Navigate:** From the main menu, select Appointments > Unscheduled Appointments Inquiry. All unscheduled appointments appear in the Unscheduled Appointment Inquiry window.



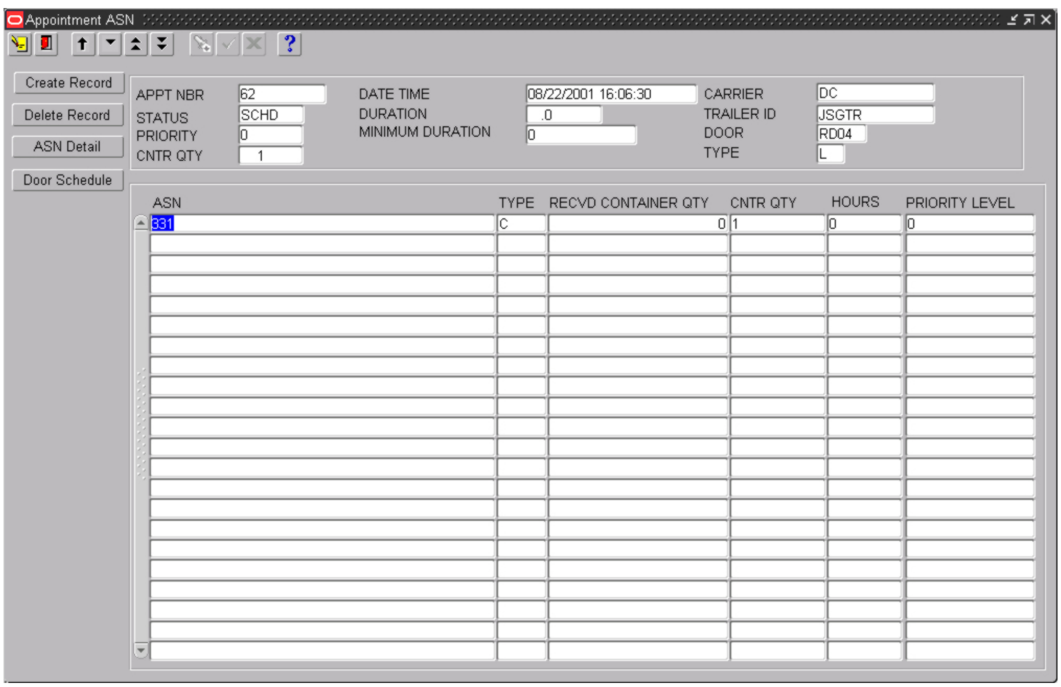

**Unscheduled Appointment Inquiry Window**

## Edit the Details of an Appointment

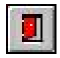
1. On the Unscheduled Appointment Inquiry window, select the appointment that you want to edit.
2. Click **Details**. If an ASN is associated with the appointment, the Appointment ASN window opens; otherwise, the Appointment Detail window opens.




**Appointment Detail Window**

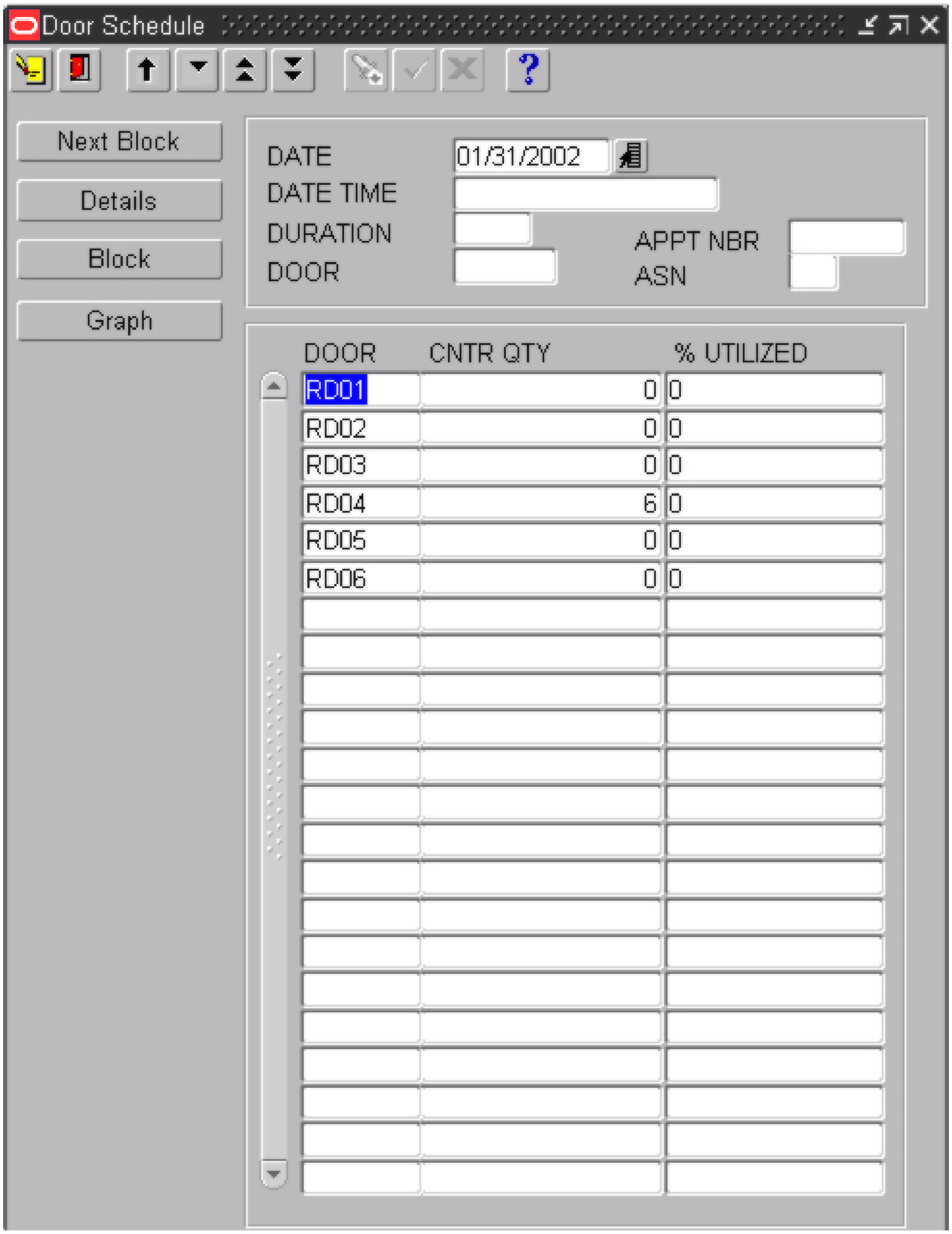



**Appointment ASN Window**

3. Edit the details as necessary.
4. Click the exit  button to close the detail window.

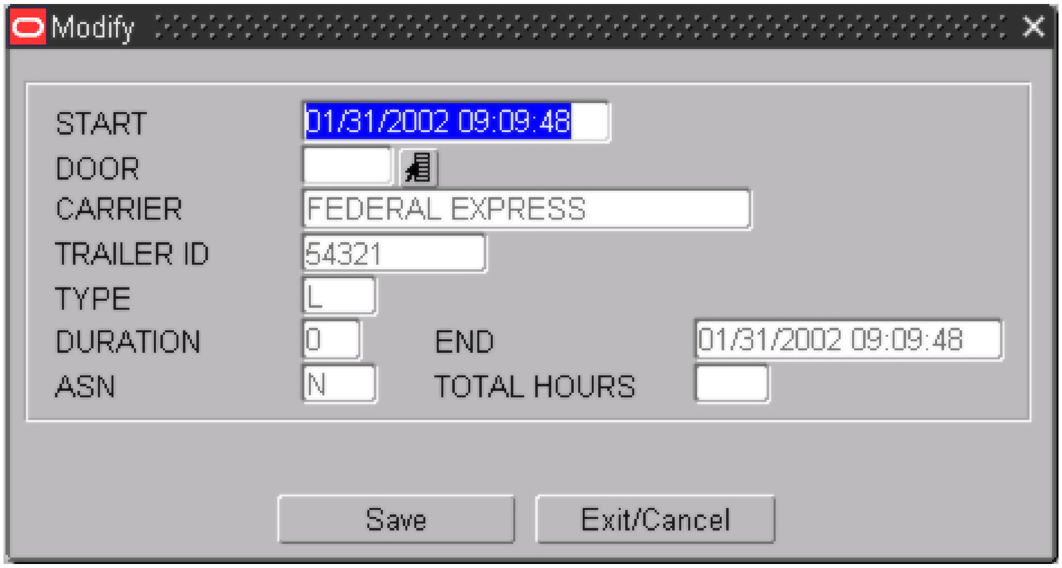
## Schedule an Appointment

1. On the Unscheduled Appointment Inquiry window, select the appointment that you want to schedule.
2. Click **Door Schedule**. The Door Schedule window opens.

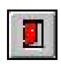



**Door Schedule Window**

3. Click **Next Block**, if necessary, to place the cursor in the top part of the window.
4. Double-click the Date Time field. The Modify window opens.




**Modify Window**

5. Enter the missing details as necessary.
6. Click **Save** to save the changes and close the Modify window.
7. Click the exit  button to close the Door Schedule window.

## Delete an Appointment

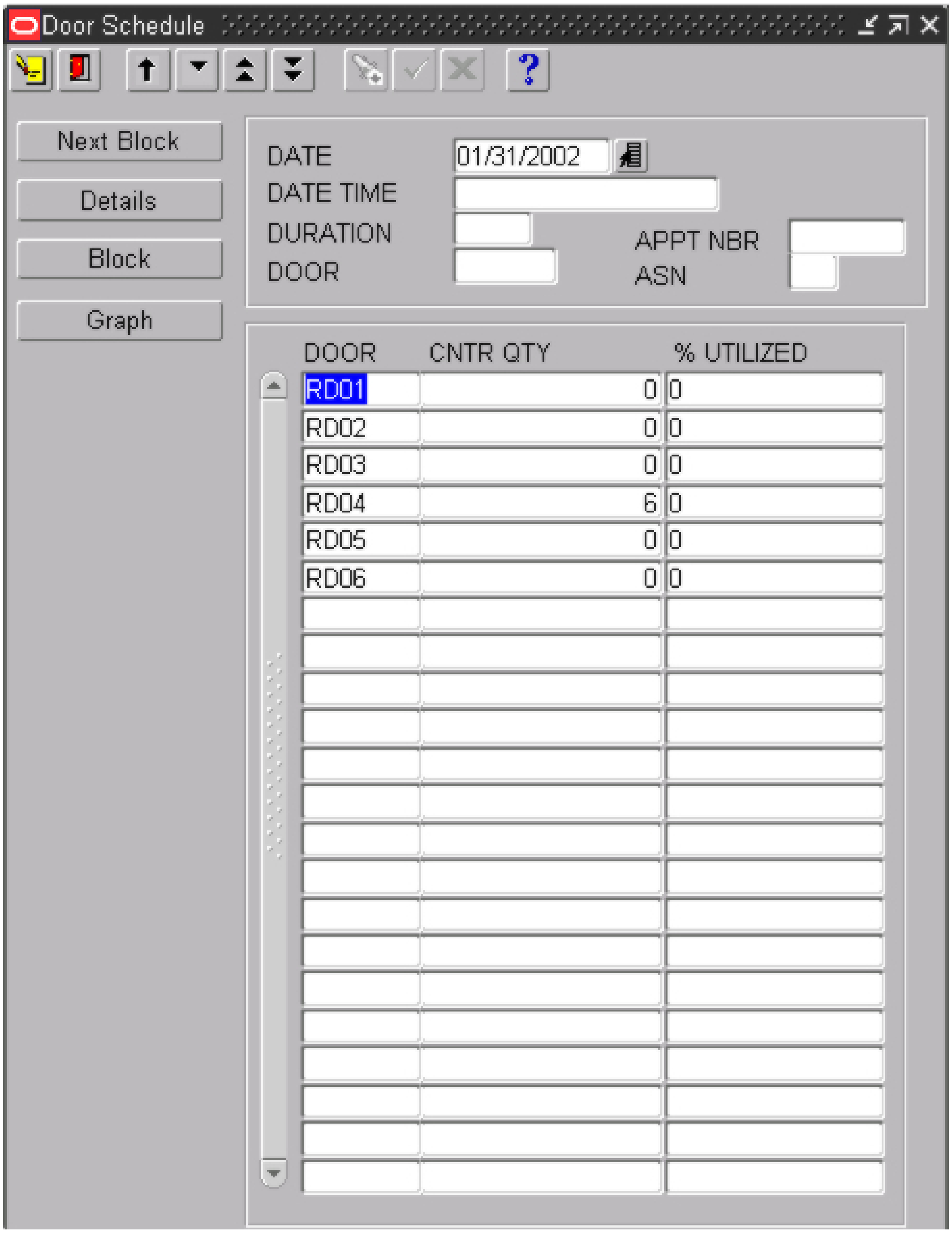
1. On the Unscheduled Appointment Inquiry window, select the appointment that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Exit the Unscheduled Appointment Inquiry Window

- Click the exit  button to close the window.

# Maintain Door Schedules

**Navigate:** From the main menu, select Appointments > Door Schedule Screen. The Door Schedule window opens.




**Door Schedule Window**

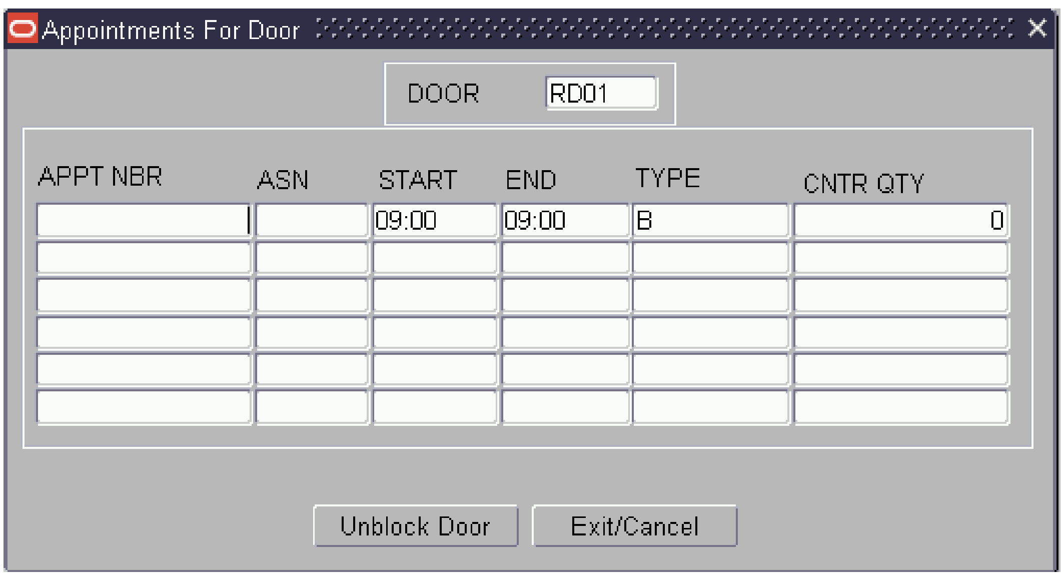
**Note:** You can also access this window from the following windows: Appointed PO Inquiry, Appointment Detail, Appointment ASN, NSC Appointment Detail, Appointment Schedule, and Unscheduled Appointment Inquiry.

## Display Doors by Date

1. If any doors are currently displayed, click the clear button.
2. In the Date field, enter a date or click the calendar button and select the date.
3. Click the execute query button. The door activity for the specified date is displayed.

## View the Appointments Assigned to a Door

1. On the Door Schedule window, click **Next Block** to place the cursor in the bottom part of the window.
2. Select the door that you want to view.
3. Click **Details**. The day's appointments for the selected door appear in the Appointments for Door window.




**Appointments for Door Window**

4. Click **Exit/Cancel** to close the Appointments for Door window.

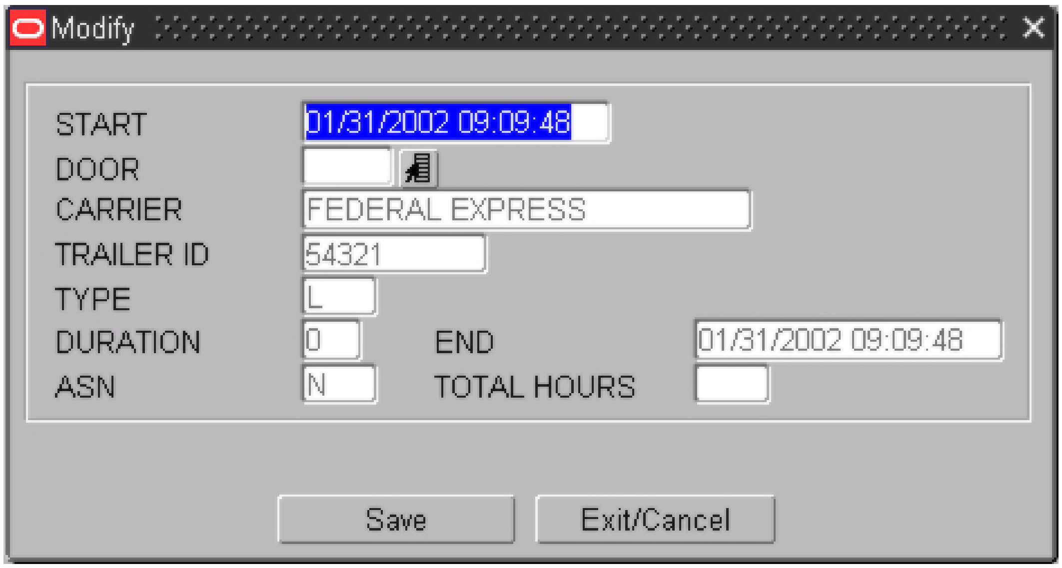
## View a Graph of Door Utilization

- On the Door Schedule window, click **Graph**. The percentage of utilization for each door opens on a bar graph.

## Edit a Door Schedule

**Note:** You can edit the schedule if the fields in the top part of the window are filled in. Whether data appears in that area depends on how you access the window.

1. On the Door Schedule window, click **Next Block** to place the cursor in the top part of the window.
2. Double-click the Date Time field. The Modify window opens.

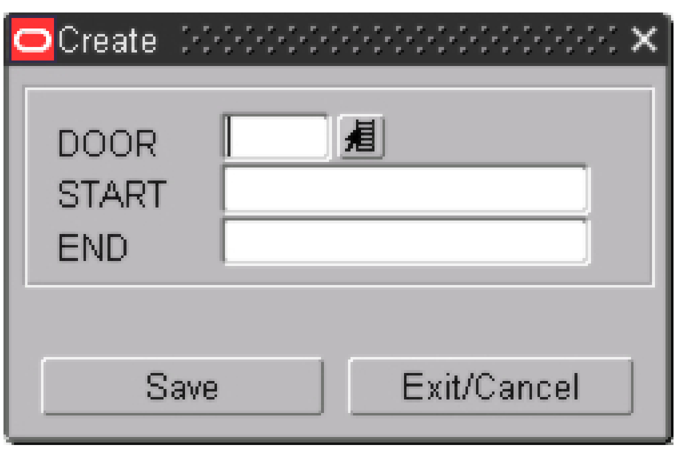



**Modify Window**

3. Edit the enabled fields as necessary.
4. Click **Save** to save any changes and close the Modify window.

## Block a Door

1. On the Door Schedule window, click **Block**. The Create window opens.




**Create Window**

2. In the Door field, enter the ID of the door, or click the LOV button and select the door.
3. In the Start field, enter start date and time for the block.
4. In the End field, enter the end date and time for the block.
5. Click **Save** to save the change and close the Create window.

## Remove a Block

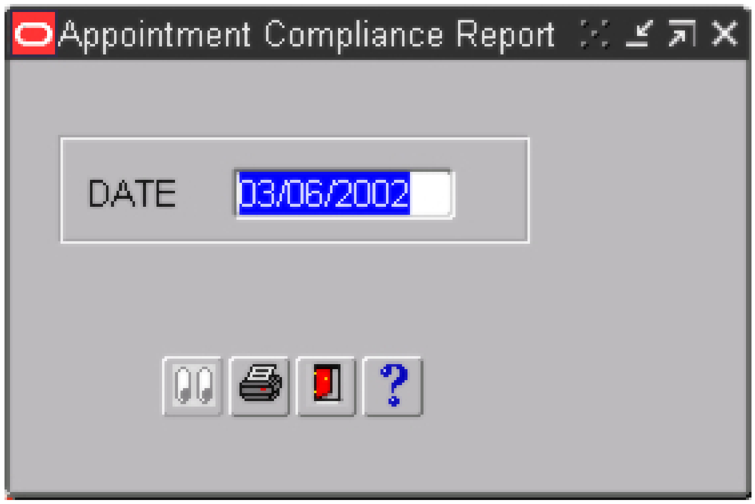
1. On the Door Schedule window, click **Next Block** to place the cursor in the bottom part of the window.
2. Select the door that you want to edit.
3. Click **Details**. The day's appointments for the selected door appear in the Appointments for Door window.
4. Select a record where the type is B (Blocked).
5. Click **Unblock Door**.
6. When prompted to delete the record, click **Yes**.
7. Click **Exit/Cancel** to close the Appointments for Door window.

## Exit the Door Schedule Window

- Click the exit button to close the window.

# Generate the Appointment Compliance Report

**Navigate:** From the main menu, select Appointments > Reports > Appointment Compliance Report. The Appointment Compliance Report window opens.




**Appointment Compliance Report Window**

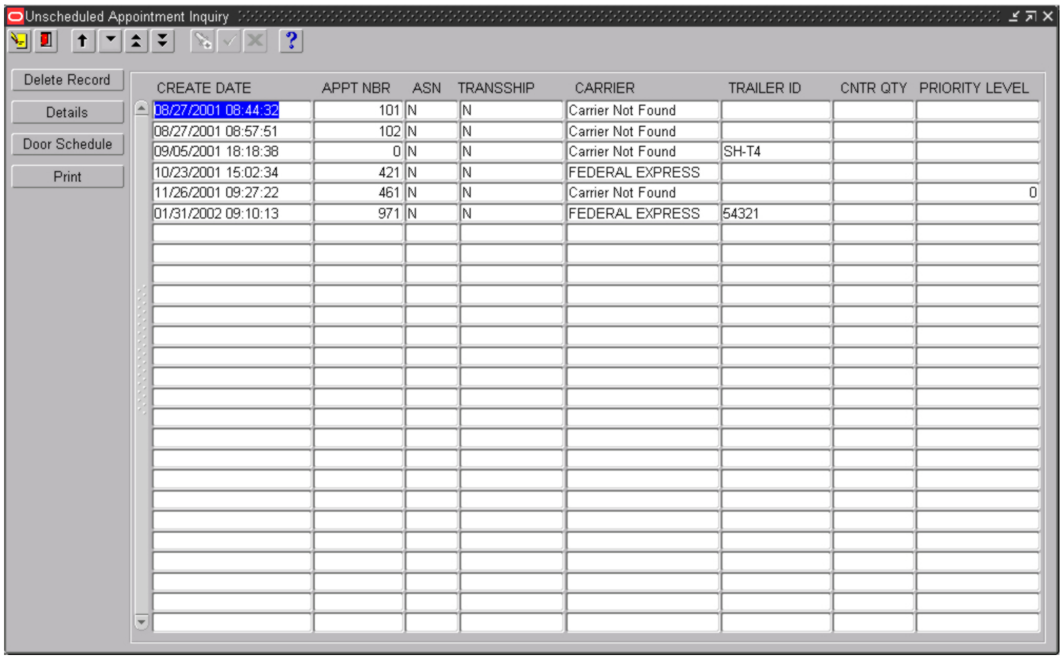
1. In the Date field, enter the date for which you want a report.
2. Click the print  button. The report is sent to the default destination.

# Generate the Appointment Schedule Report

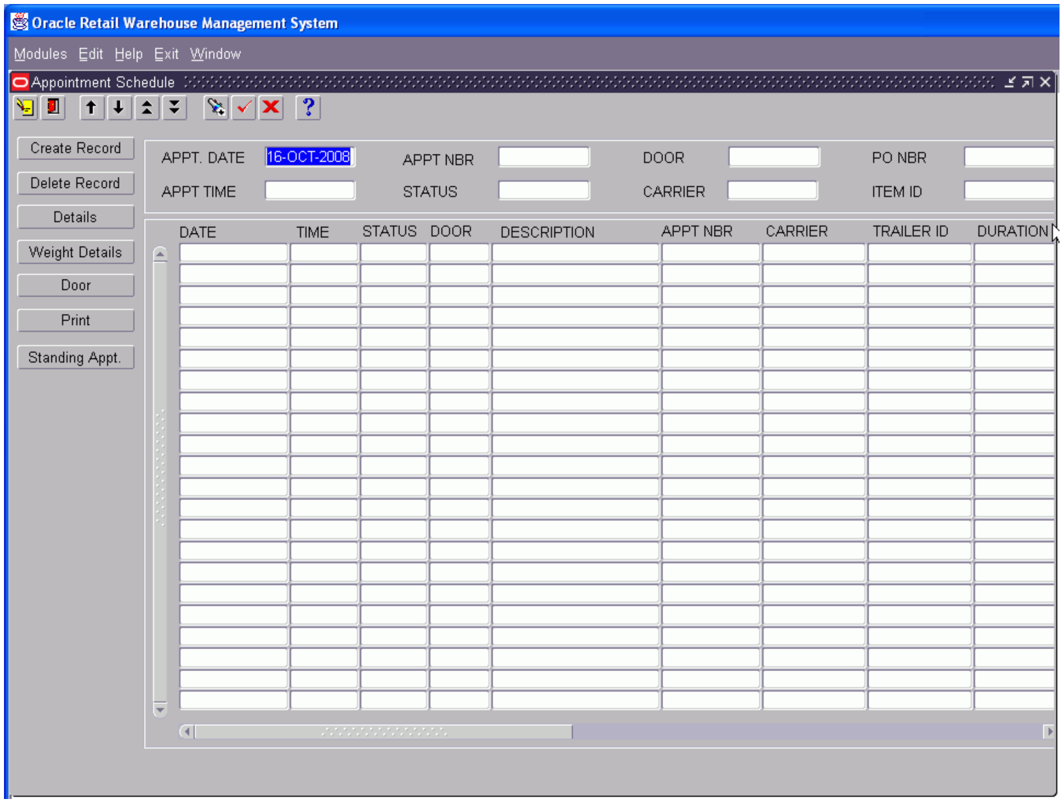
**Navigate:** From the main menu, select Appointments > Appointment Schedule. The appointments for the current date appear in the Appointment Schedule window.

Or

**Navigate:** From the main menu, select Appointments > Unschedule Appointments Inquiry. The unscheduled appointments appear in the Unscheduled Appointment Inquiry window.




**Unscheduled Appointment Inquiry Window**



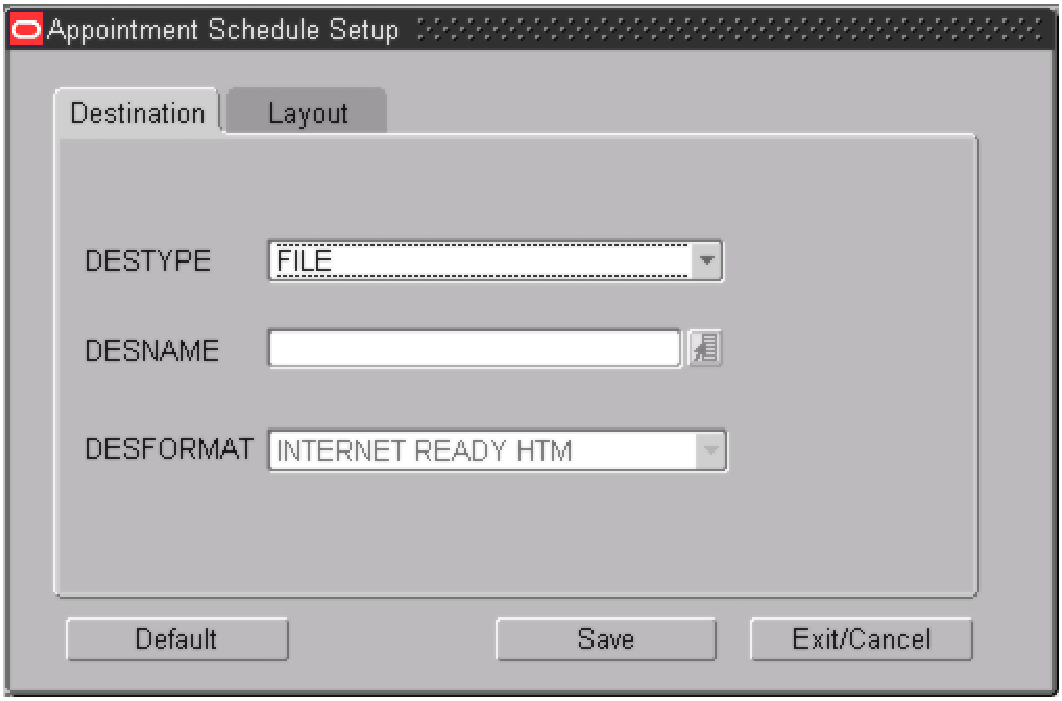

**Appointment Schedule window**

## Display Scheduled Appointments for a Specified Date

1. On the Appointment Schedule window, click the enter query  button.
2. In the Date field, enter the date, or click the calendar  button and select the date.
3. Click the execute query  button. The appointments for the specified date appear.

## Generate the Report

1. On either the Appointment Schedule or Unscheduled Appointment Inquiry window, click **Print**. The Appointment Schedule Setup window opens.




**Appointment Schedule Setup Window**

2. In the Destype field, select the type of destination.
3. In the Desname field, select the name of the destination.

**Note:** To return to the default settings, click **Default**.

4. To view the layout of the report, click on the Layout tab.
5. Click **Save**. The report is sent to the selected destination.

## Exit the Appointment Schedule or Unscheduled Appointment Inquiry Window

- Click the exit  button to close the window.

# 3

# Receiving

## Receiving Overview

Many of the receiving tasks are performed using a hand-held, radio frequency (RF) device. The RF device can be used to open appointments, receive merchandise, perform quality checks, assign trouble codes if necessary, reconcile appointments, and close appointments. Information from the RF device is transmitted to RWMS, where it can be monitored and acted upon.

### Business Process

Prior to receiving merchandise, you can generate receiving packages for all but NSC type appointments. For both ASN and non-ASN type appointments, the receiving package contains a report listing the expected merchandise. Depending on system settings, receiving labels may be printed for non-ASN type appointments. You can monitor the status of the print requests for receiving packages. The status may be: Submitted, In-Work, Done, or Failed. You can rush an urgent request or resubmit a failed request.

You can print generic labels for blind receipts, label less receiving, or ASN type appointments that have PO type ASNs. Generic labels are not used for NSC type appointments.

If some receiving labels are not used, you can nullify them. If the information changes for a non-ASN type appointment, you would first nullify the labels and then reprint them.

You can monitor the status of receiving doors. The status of a door may be Busy or Available. You can also view the items received by receipt number.

Should trouble codes be assigned to a container, the troubled merchandise must be resolved or refused. If the troubled merchandise is resolved, it can be received into inventory. If the merchandise is refused, it is marked for return to the vendor.

You can edit the contents of a container, when necessary. This includes changing unit and container quantities, adding and deleting items, and entering receipt weights and best before dates.

The status of a container is tracked from the moment it is entered into the system. The status may be:

- Appointed (A): The container is associated with an inbound appointment; it is not yet received.
- Distributed (D): The container contains allocated merchandise.
- Inventory (I): The container is eligible for allocation.
- Manifested (M): The container is associated with a bill of lading.
- Non-saleable (N): The container contains returned merchandise that is marked as not resalable.
- Pick (P): The container is associated with a pick package.
- Return to vendor (R): The container contains merchandise that is marked for return to the vendor.
- Shipped (S): The container is released from the distribution center and in transit to a ship-to destination.

- Troubled (T): The container contains merchandise that is marked with one or more trouble codes that must be resolved.
- Expired (X): The container contains merchandise that has passed the designated pick-not-after date and is no longer valid.

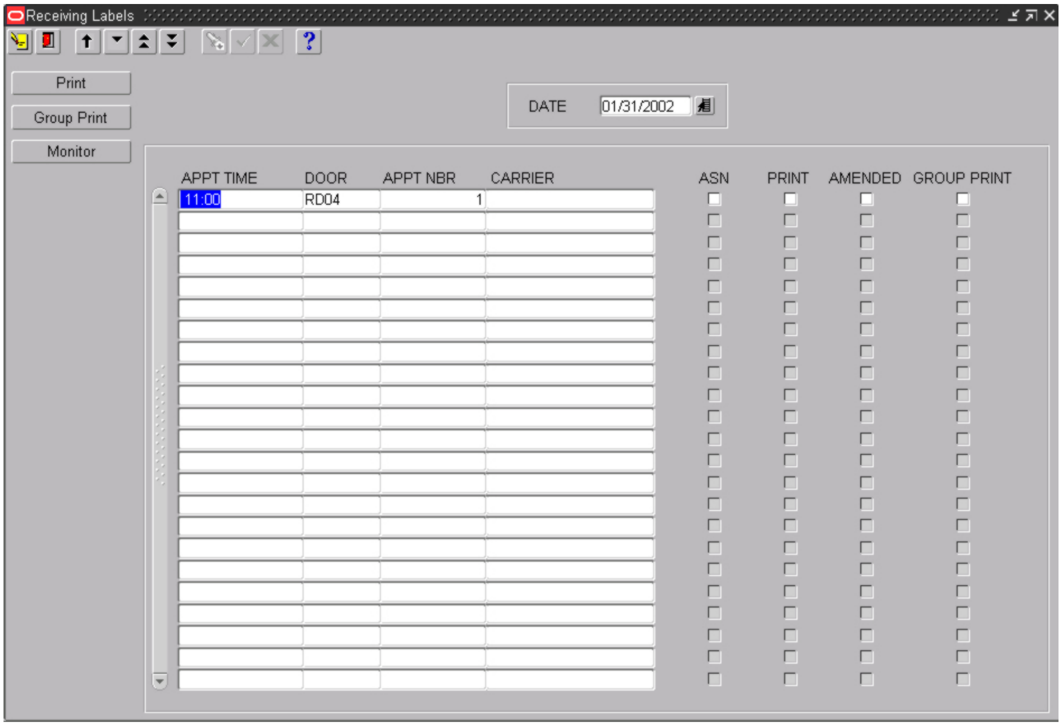
## Reports

The following reports are available in the Receiving module:

- ASN Receiving Package Audit report: Provides details for both container type and purchase order type ASNs that are associated with an ASN type appointment.
- Receiving Package Audit List report: Provides details for containers and purchase orders that are associated with a non-ASN type appointment.
- Receiving Adjustments report: Provides details regarding any adjustments made to unit quantities on a received appointment.
- Refusal Advice report: Provides details regarding merchandise that was marked for return to vendor rather than received into inventory.
- ASN Receiving Receipt report: Provides details regarding items received for an ASN type appointment.
- Receiving Receipt report: Provides details regarding items received for a non-ASN type appointment.
- Receiving Register report: Provides a summary of all receipts for a specified date.
- Receive Workload Plan report: Provides a summary of the appointments that are scheduled for a specified door and date.
- Unresolved Appointment report: Provides details regarding all unresolved appointments. These are appointments with a status of Unrc (Unreconciled).

# Generate Receiving Packages

**Navigate:** From the main menu, select Receiving Allocation > Receiving Labels. The Receiving Labels window opens.



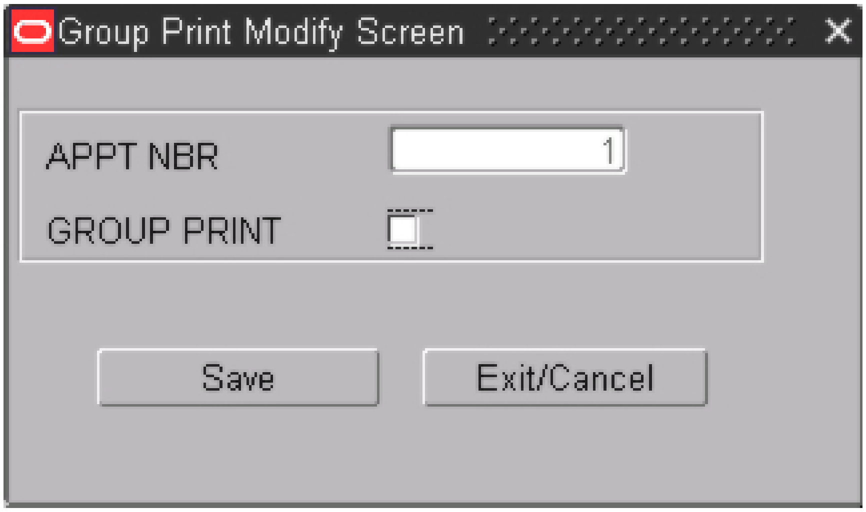

**Receiving Labels Window**

## Display Appointments by Date

1. If any appointments are currently displayed, click the clear  button.
2. In the Date query field, enter a date or click the calendar  button and select the date.
3. Click the execute query  button. The appointments for the selected date appear.

## Edit the Group Print Status of Appointments

1. On the Receiving Labels window, double-click the appointment that you want to edit. The Group Print Modify Screen window opens.

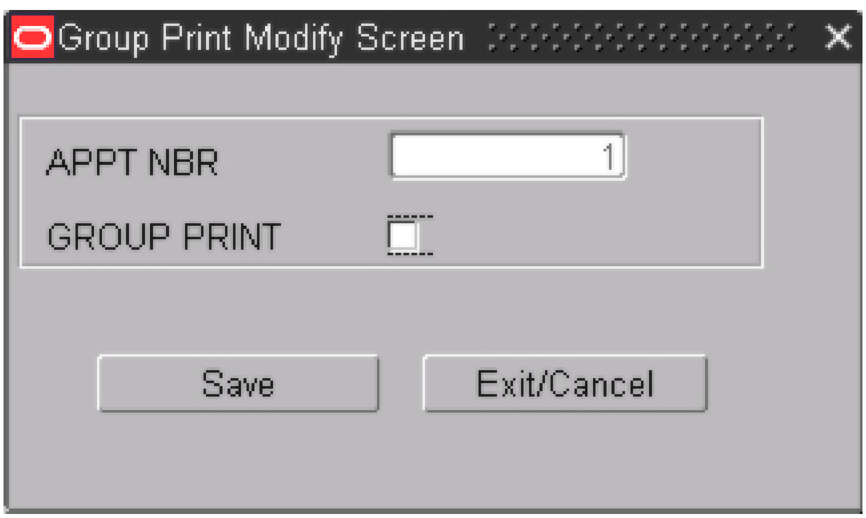



**Group Print Modify Screen Window**

2. Select or clear the Group Print check box as necessary.
3. Click **Save** to save any change and close the window.

## Print Receiving Packages for Multiple Appointments

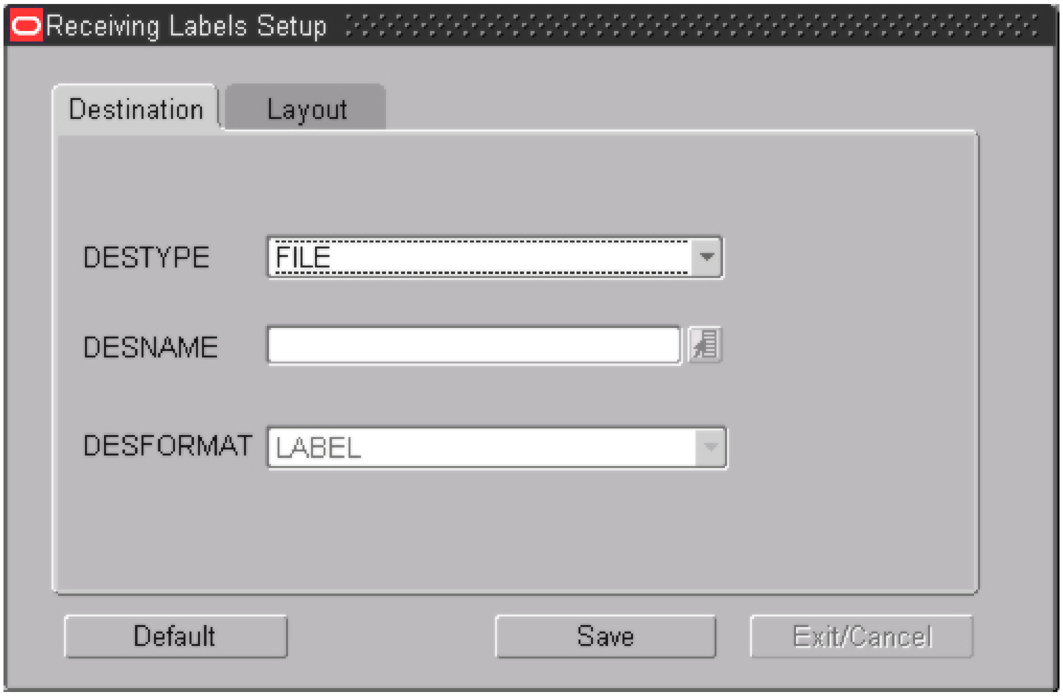
1. On the Receiving Labels window, click **Group Print**. The Group Print Screen window opens.




**Group Print Modify Screen Window**

2. In the Start field, enter the start time for the range of appointments.
3. In the End field, enter the end time for the range of appointments.
4. Click **Print Form**. Depending on the types of appointments included in the group print, one or more of the following report setup windows may appear in consecutive order:

- Receiving Labels Setup: Used to generate labels for labeled receiving of non-ASN type appointments.




**Receiving Labels Setup Window**

- Recv Package Audit List Setup: Used to generate the Receiving Package Audit List report for non-ASN type appointments.


**Recv Package Audit List Setup Window**

- ASN Receiving Package Audit Setup: Used to generate the ASN Receiving Package Audit report for ASN type appointments.


**ASN Receiving Package Audit Setup Window**

5. In the Destype field, select the type of destination.
6. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

7. To view the layout of the report, click on the Layout tab.
8. Click **Save**. The labels and reports for the appointments within the selected time range are sent to the selected destinations.

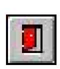
## Print a Receiving Package for One Appointment

1. On the Receiving Labels window, select the appointment for which you want to print labels and a report.
2. Click **Print**.
3. When prompted to confirm your request, click **Yes**. Depending on the type of appointment, one or more of the following report setup windows may appear in consecutive order:
   - Receiving Labels Setup: Used to generate labels for labeled receiving of non-ASN type appointments.
   - Recv Package Audit List Setup: Used to generate the Receiving Package Audit List report for non-ASN type appointments.
   - ASN Receiving Package Audit Setup: Used to generate the ASN Receiving Package Audit report for ASN type appointments.
4. In the Destype field, select the type of destination.
5. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

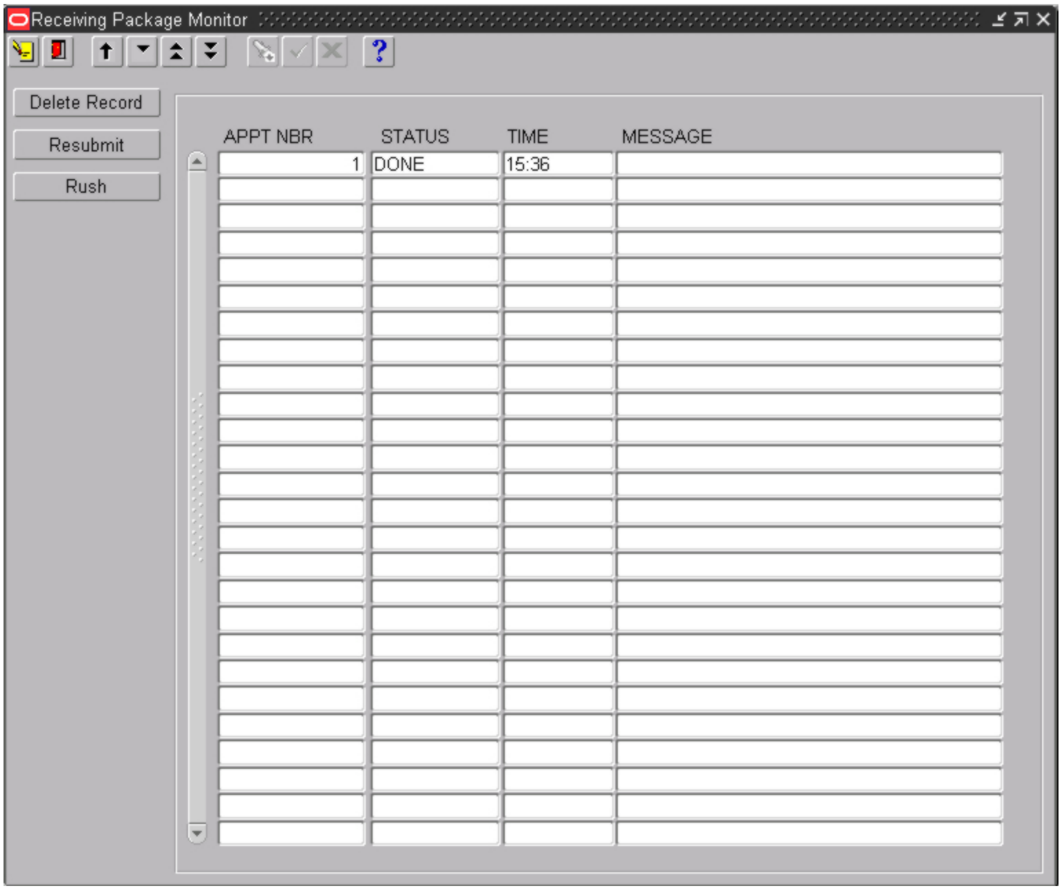
6. To view the layout of the report, click on the Layout tab.
7. Click **Save**. The labels are sent to the selected destination.

## Exit the Receiving Labels Window

- Click the exit  button to close each window.

# Maintain Receiving Packages

**Navigate:** From the main menu, select Receiving Allocation > Receiving Package Monitor. The current receiving packages appear in the Receiving Package Monitor window.




**Receiving Package Monitor Window**

## Delete a Receiving Package from the Monitor

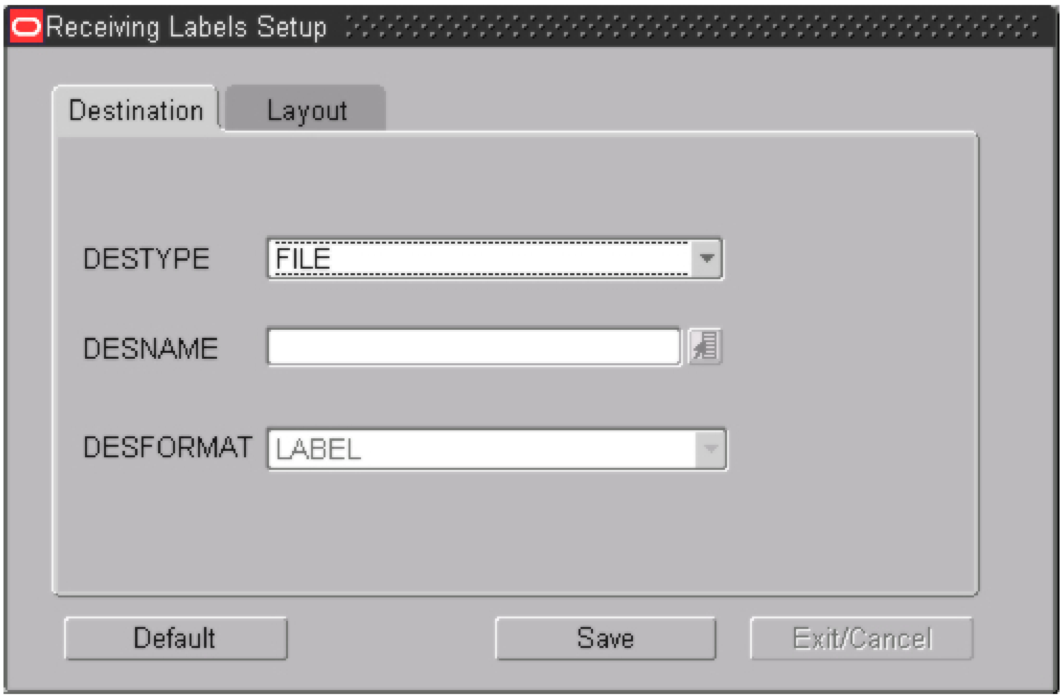
> **Note:** Only receiving package records with a status of Submitted, Done, or Failed may be deleted from the monitor.

1. On the Receiving Package Monitor window, select the receiving package that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Reprint a Receiving Package

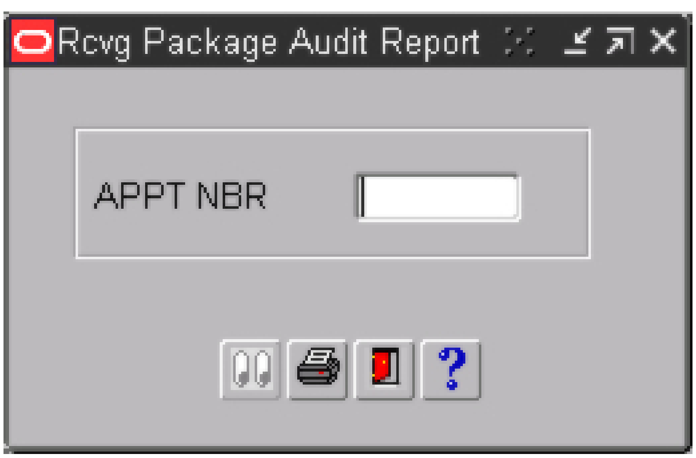
**Note:** Receiving packages with a status of Failed or Done may be reprinted.

1. On the Receiving Package Monitor window, select the receiving package that you want to reprint.
2. Click **Resubmit**. Depending on the type of appointment, one or more of the following report setup windows may appear in consecutive order:
   - Receiving Labels Setup: Used to generate labels for labeled receiving of non-ASN type appointments.




**Receiving Labels Setup**

   - Recv Package Audit List Setup: Used to generate the Receiving Package Audit List report for non-ASN type appointments.




**Recv Package Audit List Setup**

- ASN Receiving Package Audit Setup: Used to generate the ASN Receiving Package Audit report for ASN type appointments.


**Recv Package Audit List Setup**

3. In the Destype field, select the type of destination.
4. In the Desname field, select the name of the destination.

**Note:** To return to the default settings, click **Default**.

5. To view the layout of the report, click on the Layout tab.
6. Click **Save**. The labels are sent to the selected destination.

## Rush a Request for a Receiving Package

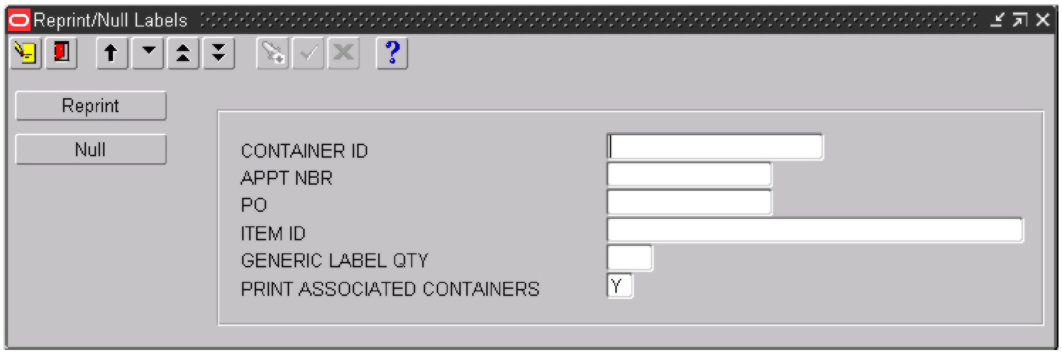
1. On the Receiving Package Monitor window, select the receiving package that you want to rush.
2. Click **Rush**. The Message field is updated to indicate that the request is a rush job. The Time field is changed to show that the request is now the earliest request in Submitted status.

## Exit the Receiving Package Monitor Window

- Click the exit  button to close the window.

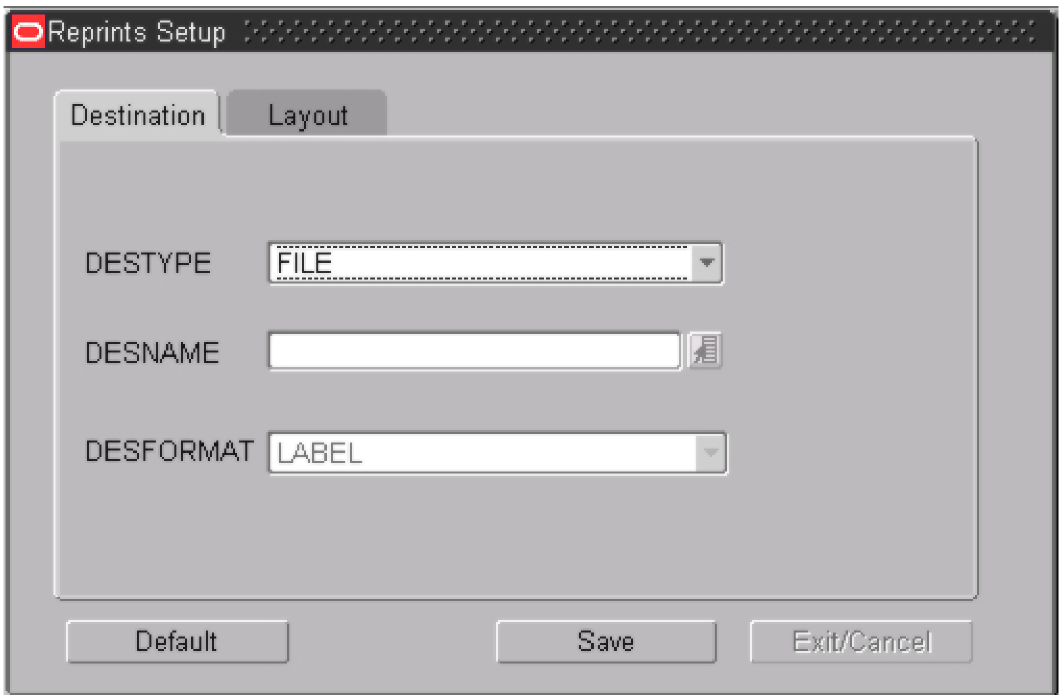
# Print Generic Labels

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Reprint/Null Labels. The Reprint/Null Labels window opens.




**Reprint/Null Labels Window**

1. In Generic Label Qty field, enter the number of labels to be printed.
2. Click **Reprint**. The Reprints Setup window opens.




**Reprints Setup Window**

3. In the Destype field, select the type of destination.
4. In the Desname field, select the name of the destination.

**Note:** To return to the default settings, click **Default**.

5. To view the layout of the report or labels, click on the Layout tab.
6. Click **Save**. The labels are sent to selected destination.
7. Click the exit  button to close the Reprint/Null Labels window.

# Generate the ASN Receiving Package Audit Report

**Navigate:** From the main menu, select Receiving Allocation > Reports > ASN Receiving Package Audit List. The ASN Receiving Package Audit Report window opens.


**ASN Receiving Package Audit Report Window**

**Note:** You can also generate this report from the Receiving Labels window and the Receiving Package Monitor window.

1. In the Appt Nbr field, enter the appointment number of an ASN type appointment.
2. Click the print  button. The report is sent to the default destination.

# Generate the Receiving Package Audit List Report

**Navigate:** From the main menu, select Receiving Allocation > Reports > Receiving Package Audit List Report. The Rcvg Package Audit Report window opens.

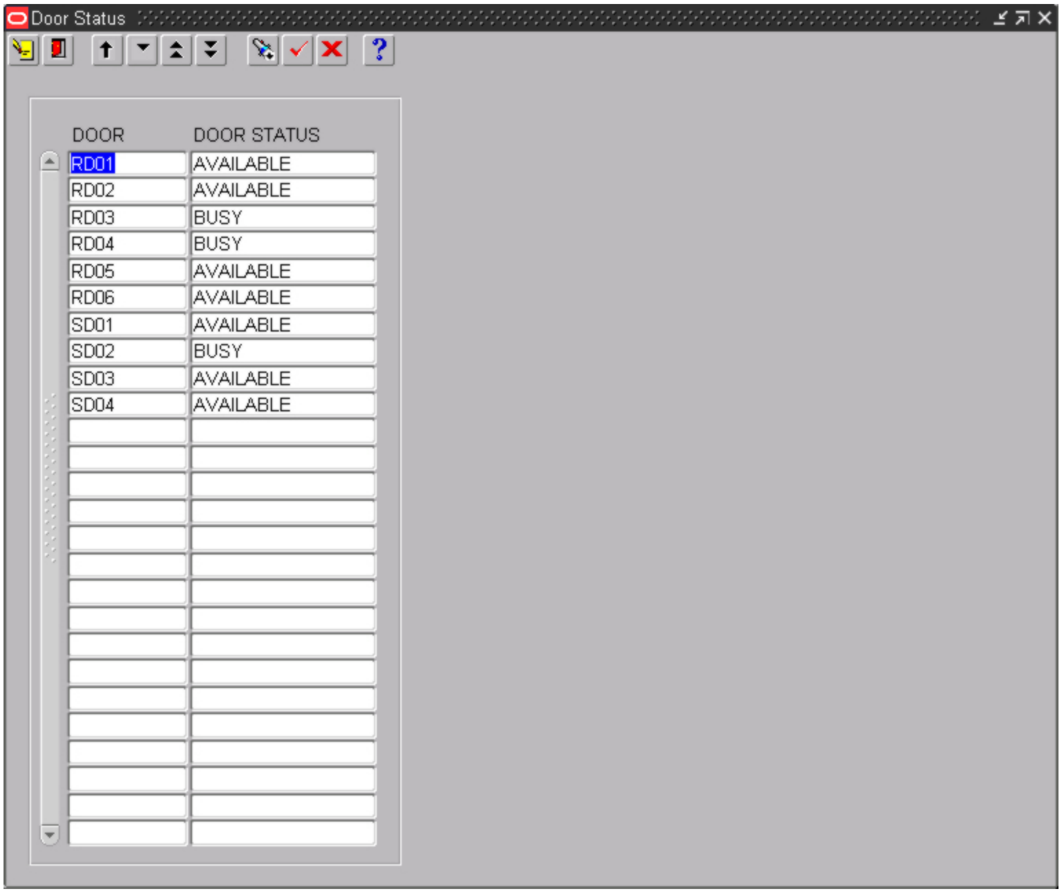

**Rcvg Package Audit Report Window**

**Note:** You can also generate this report from the Receiving Labels window and the Receiving Package Monitor window.

1. In the Appt Nbr field, enter the appointment number of a non-ASN type appointment.
2. Click the print  button. The report is sent to the default destination.

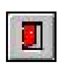
# View Door Statuses

**Navigate:** From the main menu, select Receiving > Door Status. The status of each receiving and shipping door opens in the Door Status window.



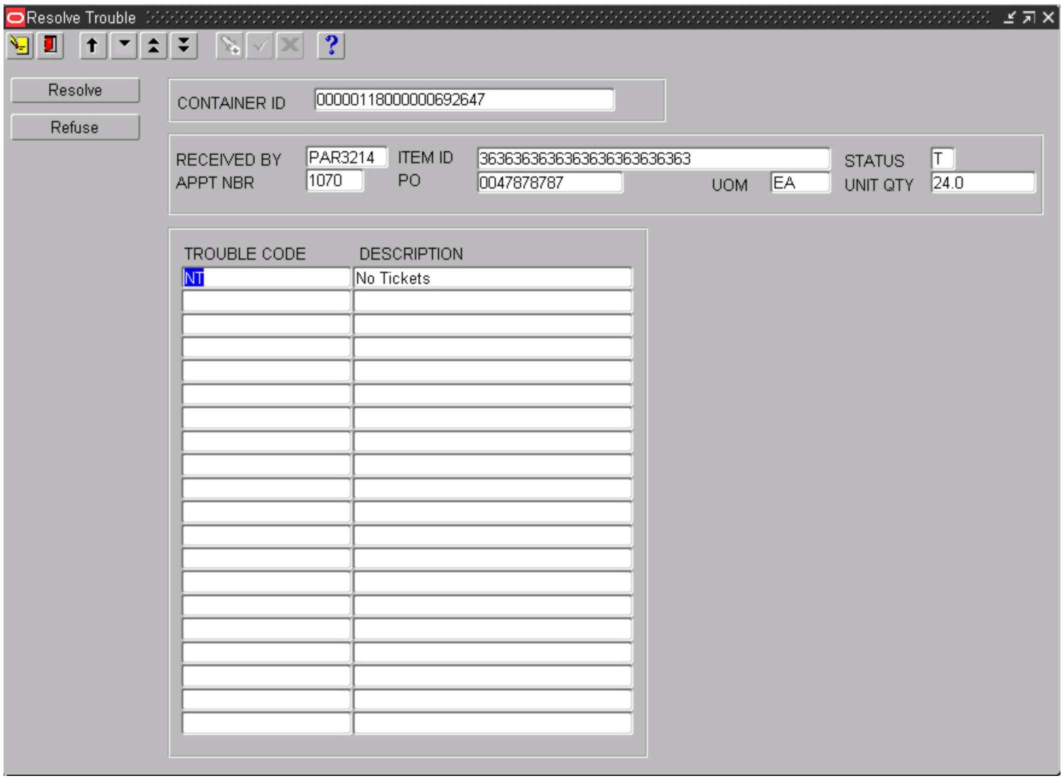

**Door Status Window**

## Exit the Door Status Window

- Click the exit  button to close the window.

# Maintain Troubled Merchandise

**Navigate:** From the main menu, select Receiving > Resolve Trouble. The Resolve Trouble window opens.



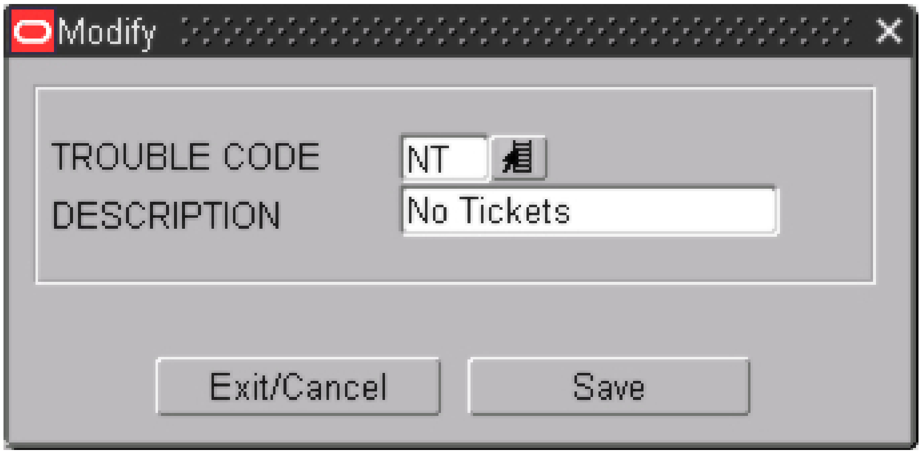

**Resolve Trouble Window**

## Display the Details of a Container

1. If any details are currently displayed, click the clear  button.
2. In the Container ID field, enter the ID of a troubled container, or click the LOV  button and select the container.
3. Click the execute  query button. The details for the specified container are displayed.

## Edit a Trouble Code Assigned to a Container

1. On the Resolve Trouble window, double-click the trouble code that you want to edit. The Modify window opens.




**Modify Window**

2. In the Trouble Code field, enter a different trouble code, or click the LOV button and select the trouble code.
3. Click **Save** to save any changes and close the Modify window.

## Resolve Troubled Merchandise

1. On the Resolve Trouble window, select the trouble code that you want to remove.
2. Click **Resolve**.
3. When prompted to delete the record, click **Yes**. The trouble code is no longer assigned to the container.

## Refuse Troubled Merchandise

> **Note:** Only merchandise that has not been received can be refused.

1. On the Resolve Trouble window, click **Refuse**. The Refusal Advice Setup window opens.
2. In the Destype field, select the type of destination.
3. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

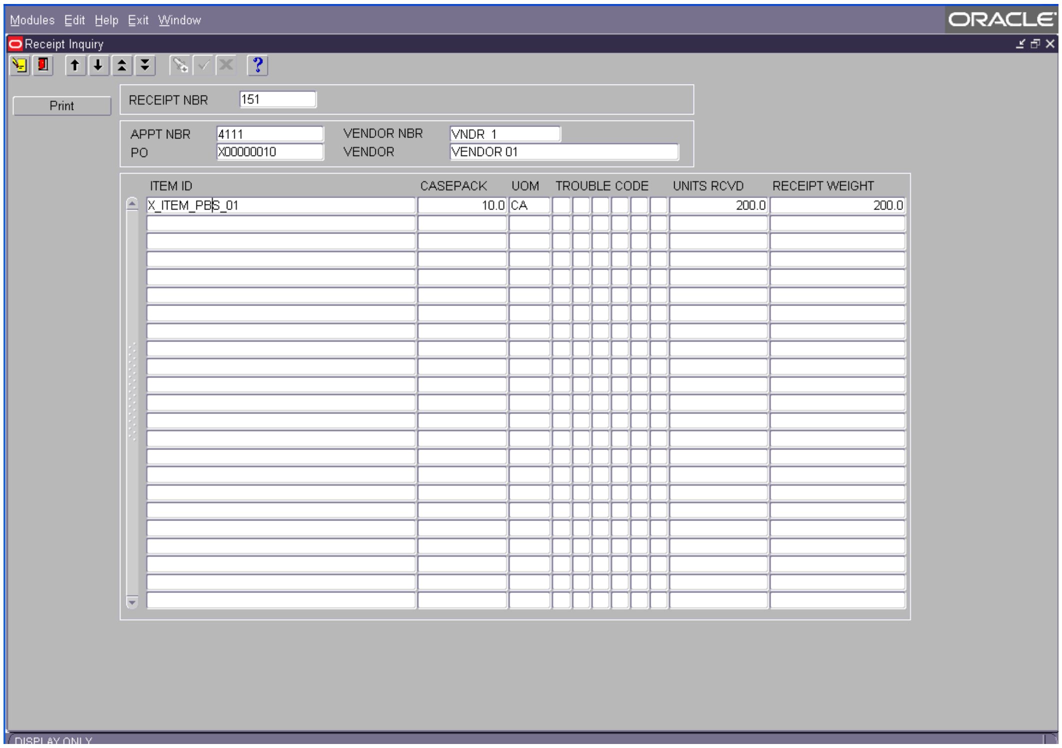
4. To view the layout of the report, click on the Layout tab.
5. Click **Save**. The Refusal Advice report is sent to the selected destination.

## Exit the Resolve Trouble Window

- Click the exit button to close the window.

# View Receipts

**Navigate:** From the main menu, select Receiving > Receipt Inquiry. The Receipt Inquiry window opens.



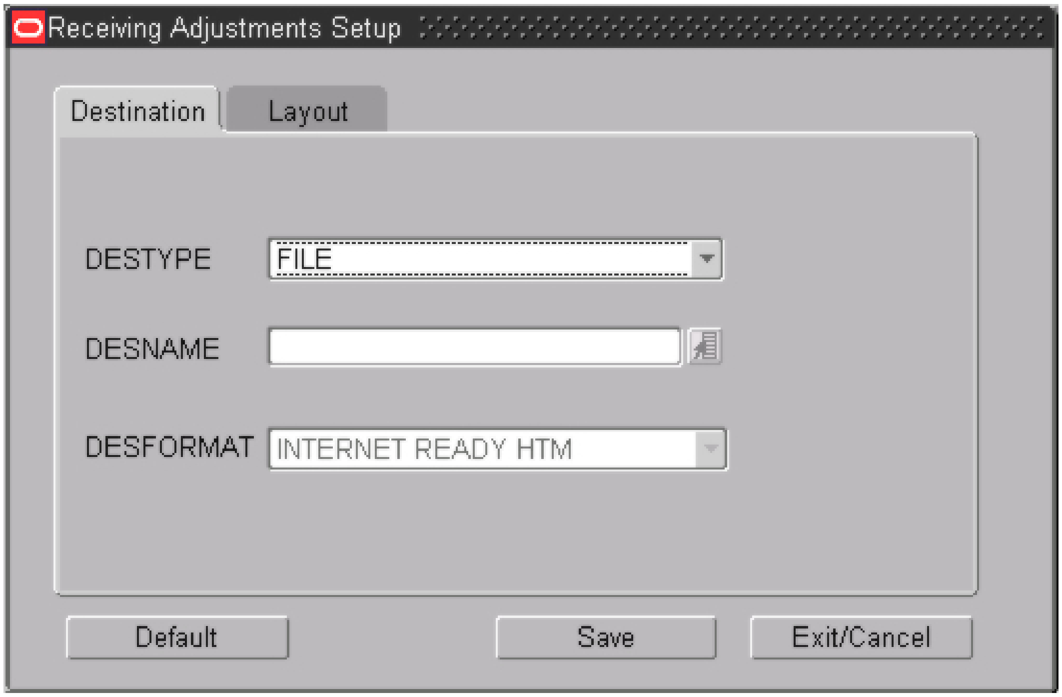

**Receipt Inquiry Window**

## Display the Details of a Receipt

1. If the details of a receipt are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Receipt Nbr query field, enter a receipt number, or click the LOV  button and select the receipt.
4. Click the execute  query button. The details of the selected receipt appear.

## Generate the Receiving Adjustments Report

1. On the Receipt Inquiry window, click **Print**. The Receiving Adjustments Setup window opens.




**Receiving Adjustments Setup Window**

2. In the Destype field, select the type of destination.
3. In the Desname field, select the name of the destination.

**Note:** To return to the default settings, click **Default**.

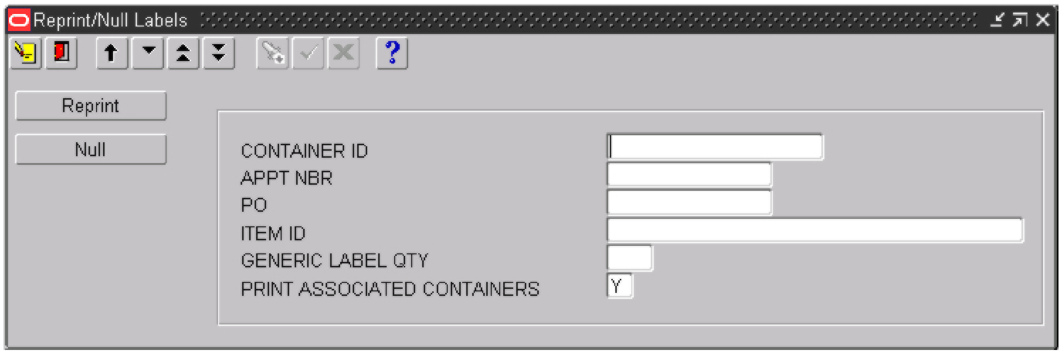
4. To view the layout of the report, click on the Layout tab.
5. Click **Save**. The report is sent to the selected destination.

## Exit the Receipt Inquiry Window

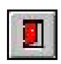
- Click the exit  button to close the window.

# Nullify Unused Labels

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Reprint/Null Labels. The Reprint/Null Labels window opens.

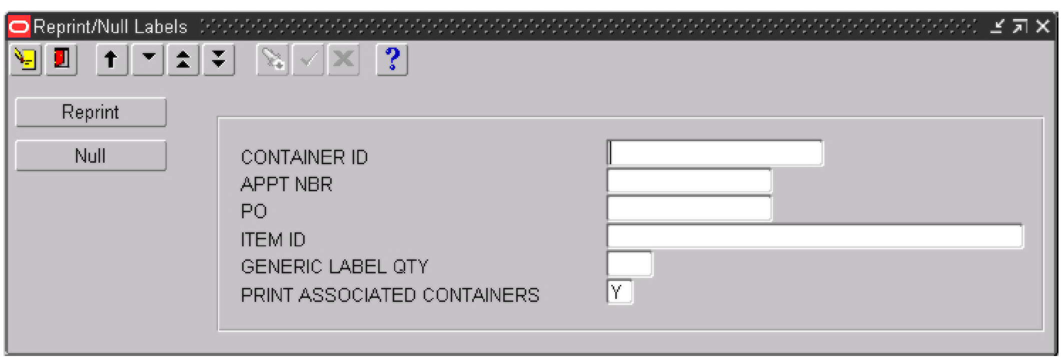



**Reprint/Null Labels Window**

1. Enter the details for the type of label that you want to cancel:
   - Container: In the Container field, enter the ID of the container.
   - Appointment: In the Appointment Nbr field, enter the appointment number.
   - PO/line item: Enter the appointment number, purchase order number, and item number in the appropriate fields.
2. Click **Null**.
3. Click the exit  button to close the Reprint/Null Labels window.

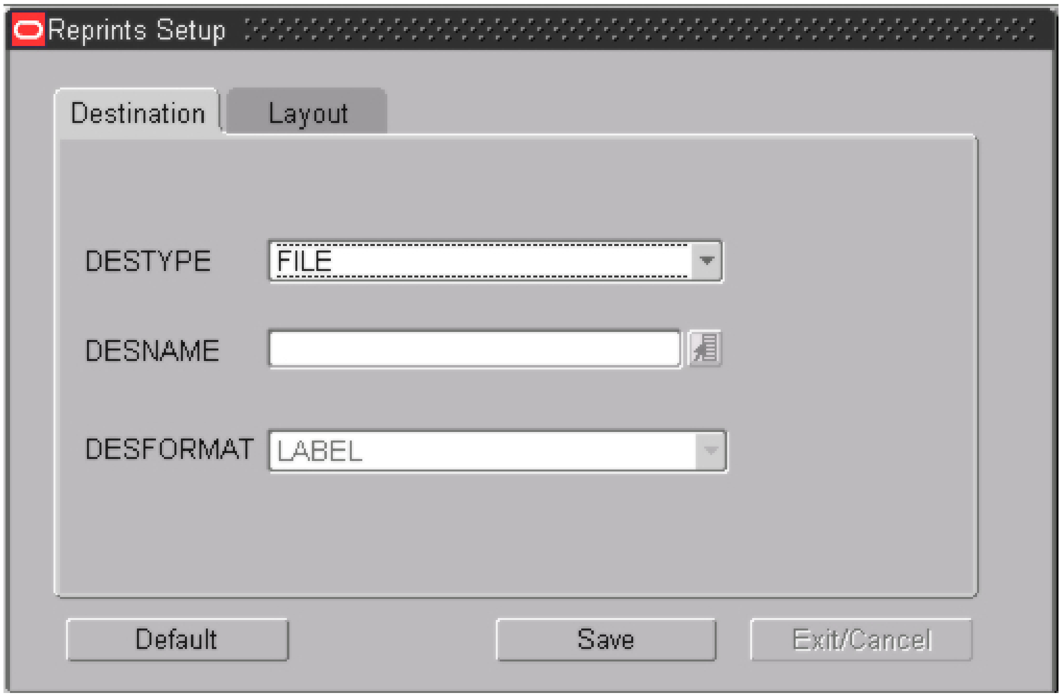
# Reprint Labels

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Reprint/Null Labels. The Reprint/Null Labels window opens.




**Reprint/Null Labels Window**

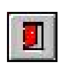
1. In the Container ID field, enter the ID of the container.
2. To reprint labels for the child containers of a master container, enter Y in the Print Associated Containers field.
3. Click **Reprint**. The Reprints Setup window opens.




**Reprints Setup Window**

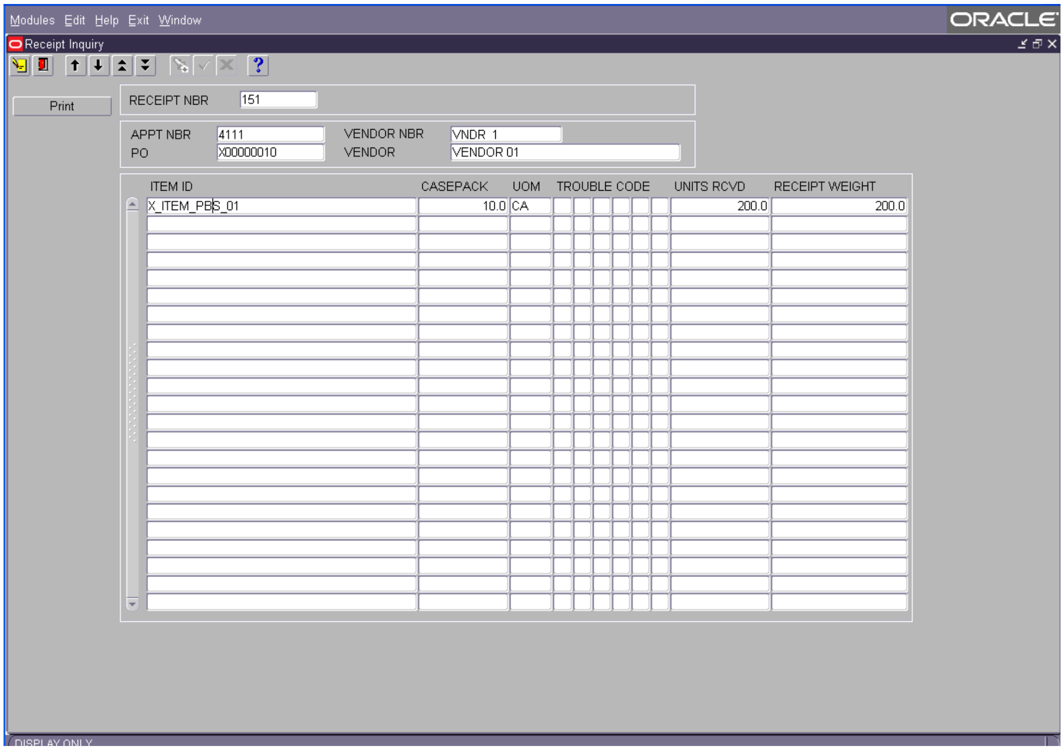
4. In the Destype field, select the type of destination.
5. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

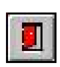
6. To view the layout of the report or labels, click on the Layout tab.
7. Click **Save**. The labels are sent to selected destination.
8. Click the exit  button to close the Reprint/Null Labels window.

# Print Receipt Inquiry Report

**Navigate:** From the main menu, select **Receiving > Receipt Inquiry**. The Receipt Inquiry window opens.

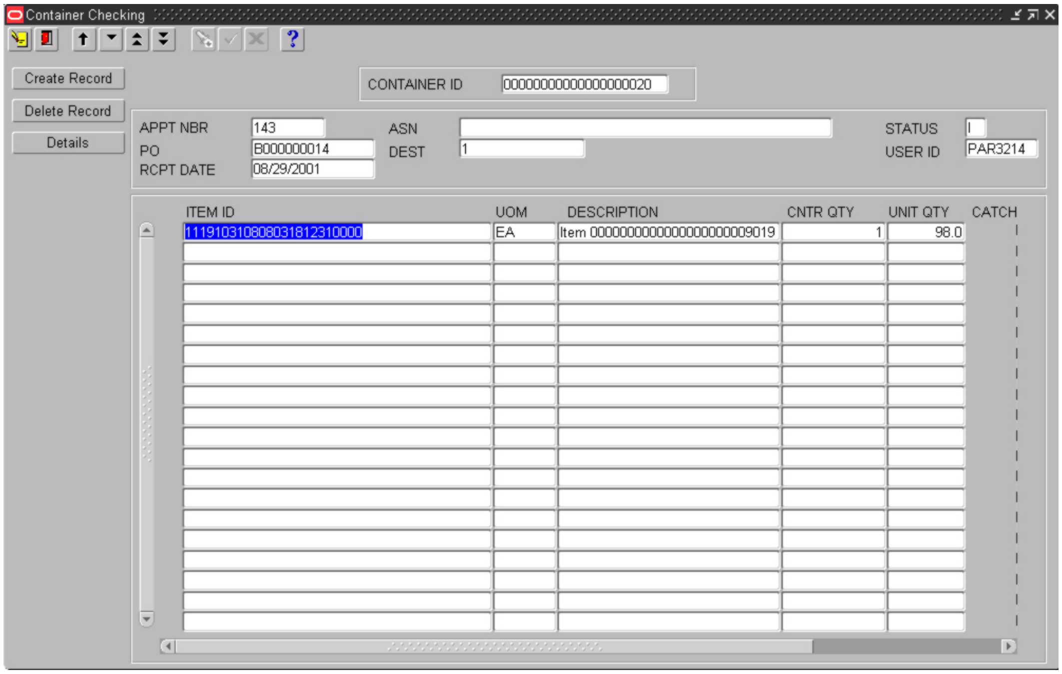



**Receipt Inquiry Window**

1. On the Receipt Inquiry window, click the enter query  button.
2. In the Receipt Nbr field, enter the ID of the returned container, or click the LOV  button and select the container.
3. In the Item ID field, select the item.
4. Click the execute  query button. The details of the return appear.
5. Click **Print**. The Receipt Inquiry report prints.
6. Click the exit  button to close the Receipt Inquiry window.

# Maintain Items in Containers

**Navigate:** From the main menu, select Receiving > Container Checking. The Container Checking window opens.




**Container Checking Window**

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**Note:** You can also access this window from the Quality Assurance and Carton Process window.

---

## Display the Details of a Container

1. If any details are currently displayed, click the clear button.
2. In the Container ID query field, enter a container ID, or click the LOV button and select the container.
3. Click the execute query button. The details for the specified container are displayed.

## Edit an Item in a Container

1. On the Container Checking window, double-click the item that you want to edit. The Create/Modify window opens.


**Create/Modify Window**

2. Edit the container quantity and unit quantity as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.
4. When prompted to select a user reason code, select the code and click **OK**.

## Add Item Details

1. On the Container Checking window, select the item that you want to edit.
2. Click **Details**. The Create/Modify window opens.


**Create/Modify Window**

3. Enter the receipt weight and best before date as necessary.
4. Click **Save** to save any changes and close the Create/Modify window.

### Add an Item to a Container

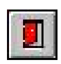
**Note:** The container must have a status of Inventory (I) or Distributed (D).

1. On the Container Checking window, click **Create Record**. The Create/Modify window opens.
2. In the Item ID field, enter the ID of the item.
3. In the Cntr Qty field, enter the number of containers.
4. In the Unit Qty field, enter the total number of units. The number of units must divide evenly into the number of containers.
5. Click **Save** to save the changes and close the Create/Modify window.
6. When prompted to select a user reason code, select the code and click **OK**.

### Delete an Item from a Container

1. On the Container Checking window, select the item that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.
4. When prompted to select a user reason code, select the code and click **OK**.

### Exit the Container Checking Window

- Click the exit  button to close the window.

## Generate the Receiving Register Report

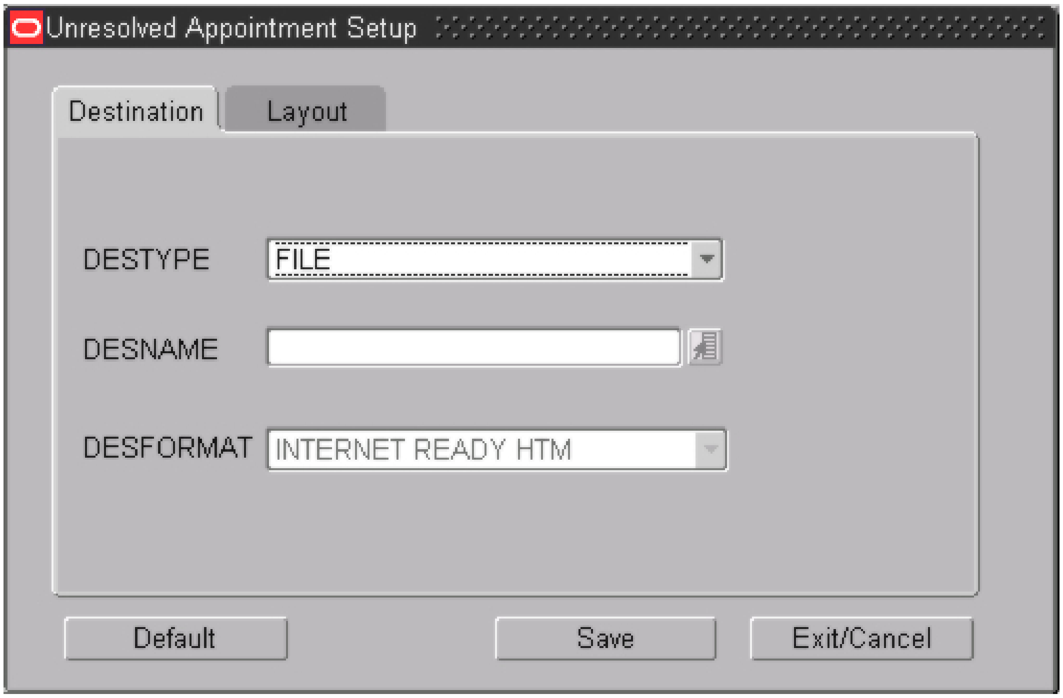
**Navigate:** From the main menu, select Receiving > Reports > Receiving Register. The Receiving Register Report window opens.


**Receiving Register Report Window**

1. In the Rcpt Date field, enter the receipt date for which you want a report.
2. Click the print  button. The report is sent to the default destination.

# Generate the Unresolved Appointment Report

**Navigate:** From the main menu, select Receiving > Reports > Unresolved Appointments. The Unresolved Appointment Setup window opens.




**Unresolved Appointment Setup Window**

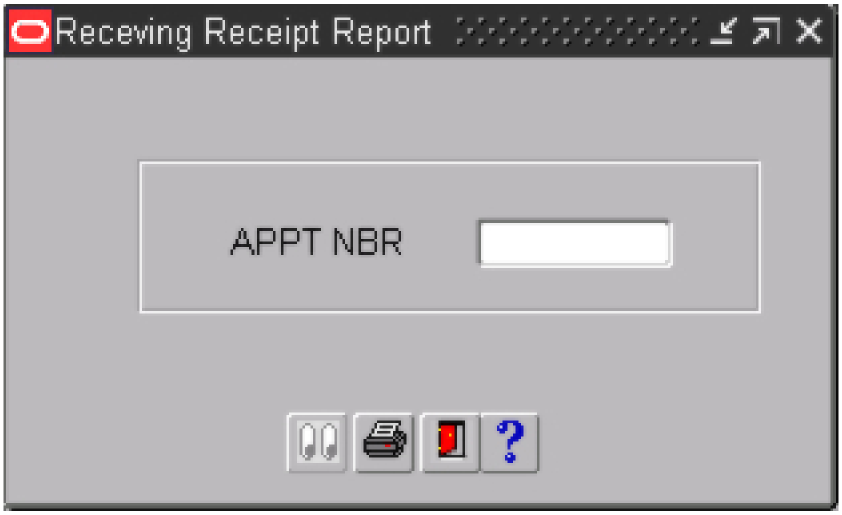
1. In the Destype field, select the type of destination.
2. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

3. To view the layout of the report, click on the Layout tab.
4. Click **Save**. The report is sent to the selected destination.

## Generate the ASN Receiving Receipt Report

**Navigate:** From the main menu, select Receiving > Reports > ASN Receiving Receipt. The ASN Rcvg Receipt Report window opens.




**ASN Rcvg Receipt Report Window**

1. In the Appt Nbr field, enter the appointment number of an ASN type appointment.
2. Click the print  button. The report is sent to the default destination.

## Generate the Receiving Receipt Report

**Navigate:** From the main menu, select Receiving > Reports > Receiving Receipt. The Receiving Receipt Report window opens.


**Receiving Receipt Report Window**

1. In the Appt Nbr field, enter the appointment number of a non-ASN type appointment.
2. Click the print  button. The report is sent to the default destination.

# Generate the Receive Workload Plan Report

**Navigate:** From the main menu, select Receiving > Reports > Receiving Workload Planning. The Receiving Workload Plan Report window opens.


**Receiving Workload Plan Report Window**

1. In the Date field, enter the appointment date for which you want a report.
2. In the Door field, enter the ID of the receiving door, or click the LOV  button and select the door.
3. Click the print  button. The report is sent to the default destination.

# 4

# Returns

## Returns Overview

When consumers return merchandise to the warehouse, a strategy must be in place to handle those returns.

There are two basic steps to handling returns: Receiving the merchandise into the DC and processing the return.

## Business Process

The host system notifies RWMS of pending returns. You can view the pending returns in order to gauge the number of returns that are expected to arrive on a particular date.

When the merchandise is received it is moved to the returns area for processing. You can look up the details of a return, such as ship to and bill to information.

Returned merchandise is processed at the item level. You must assign a reason code and an action code for each item/quantity in the container. If the item was replaced, you must identify the replacement item. After each item is processed, you are prompted to assign disposition codes and any necessary WIP codes.

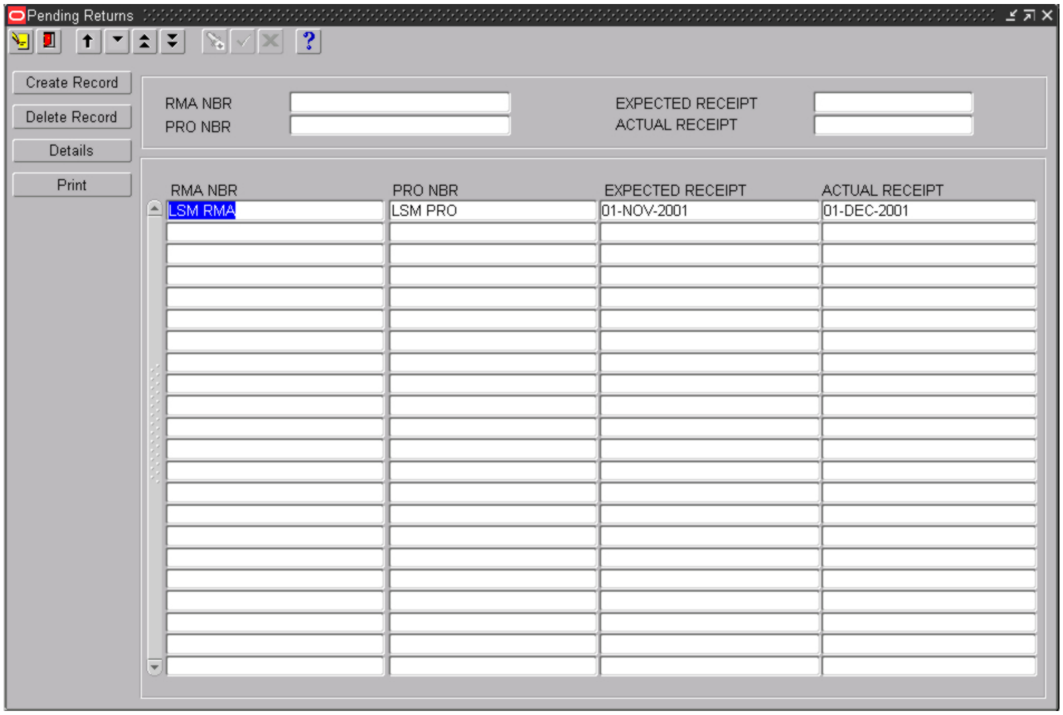
Reason codes indicate why the merchandise was returned. Action codes indicate how the merchandise should be handled. For example, an item may be returned to inventory, replaced with another item, or returned to vendor. The disposition code indicates the status of the returned item. The merchandise in the container may be marked as saleable or non-saleable. When an item is marked as non-saleable, it must be moved from the original container to a non-saleable container.

## Reports

The Pending Returns report provides a list of returns that are past their expected arrival date.

# Maintain Pending Returns

**Navigate:** From the main menu, select Returns > Pending Returns. The Pending Returns window opens.




**Pending Returns Window**

## Display All Pending Returns

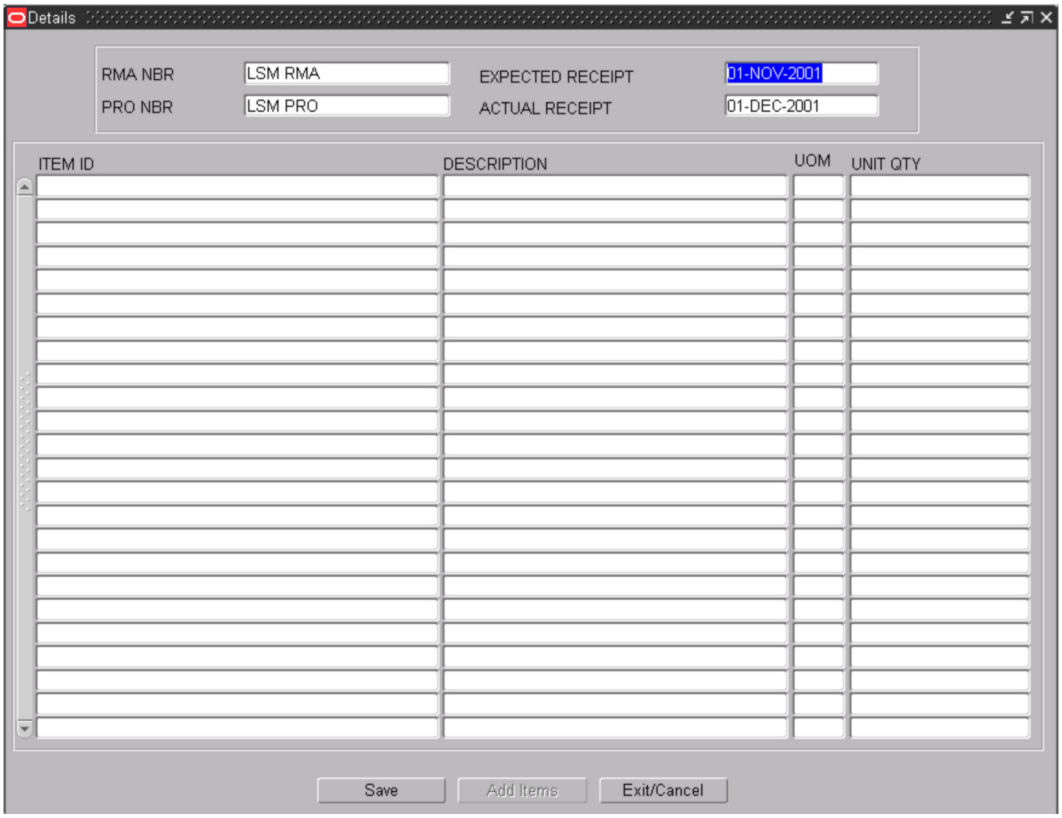
- Click the execute query button.

## Display a Pending Return

1. If any pending returns are currently displayed, click the clear button.
2. Click the enter query button.
3. Enter a return merchandise authorization number, PRO number, expected receipt date, or actual receipt date in the appropriate query fields.
4. Click the execute query button. The selected pending return opens.

## View the Items to be Returned

1. On the Pending Returns window, select the return that you want to view in detail.
2. Click **Details**. The items appear on the Details window.




**Details Window**

3. Click **Exit/Cancel** to close the Details window.

## Edit a Pending Return

1. On the Pending Returns window, double-click the return that you want to edit. The Details window opens.
2. Edit the expected and actual receipt dates as necessary.
3. Click **Save** to save any changes and close the Details window.

## Add a Pending Return

1. On the Pending Returns window, click **Create Record**. The Details window opens.
2. In the RMA Nbr field, enter the return merchandise authorization number. If the RMA Nbr is unknown, use a generic number.
3. In the PRO Nbr field, enter the carrier assigned PRO number.
4. In the Expected Receipt field, enter the date on which the returned merchandise is expected to arrive at the distribution center.
5. If the merchandise was already received, enter the date received in the Actual Receipt field.
6. To add items to the return:
   a. Click **Add Items**. The Add Items window opens.
   b. In the Item ID field, enter the item ID, or click the LOV button and select the item.
   c. In the Unit Qty field, enter the number of units to be returned.
   d. Click **Save** to save the changes and close the Add Items window. You are returned to the Details window.
7. Click the exit button to close the Details window.

## Delete a Pending Return

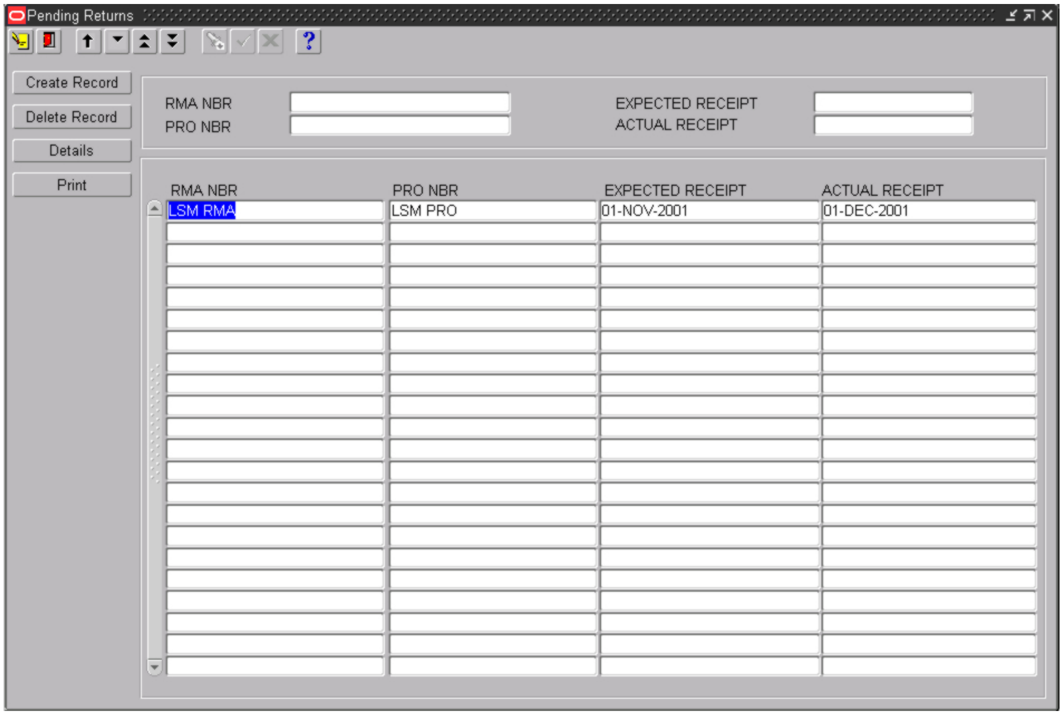
1. On the Pending Returns window, select the pending return that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Exit the Pending Returns Window

- Click the exit button to close the window.

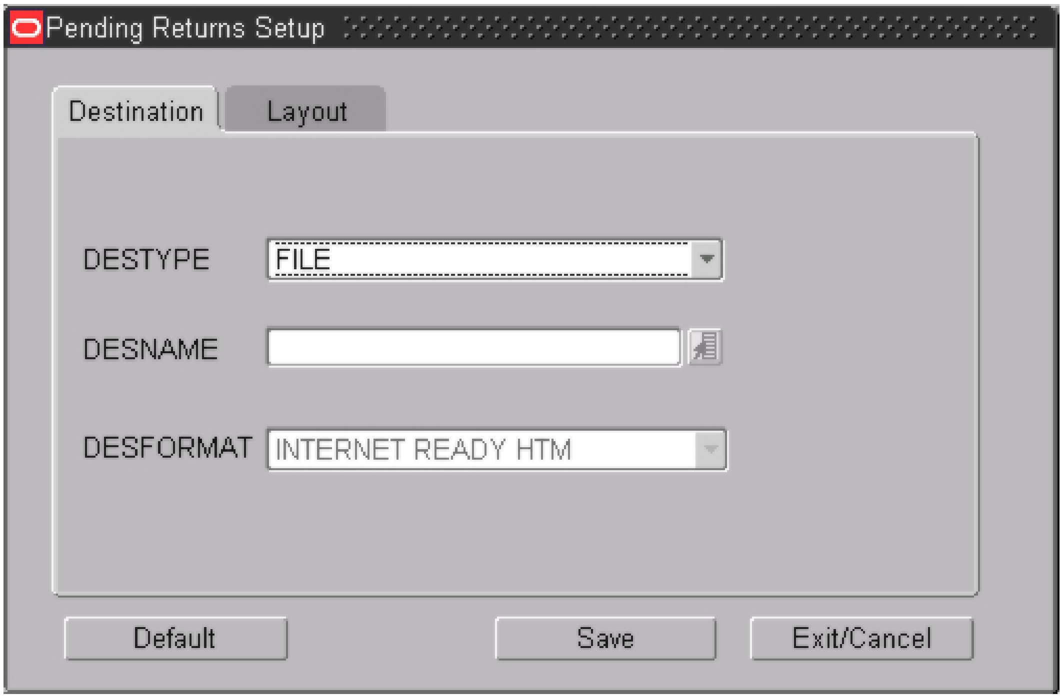
# Generate the Pending Returns Report

**Navigate:** From the main menu, select Returns > Pending Returns. The Pending Returns window opens.




**Pending Returns Window**

1. On the Pending Returns window, click **Print**. The Pending Returns Setup window opens.




**Pending Returns Setup Window**

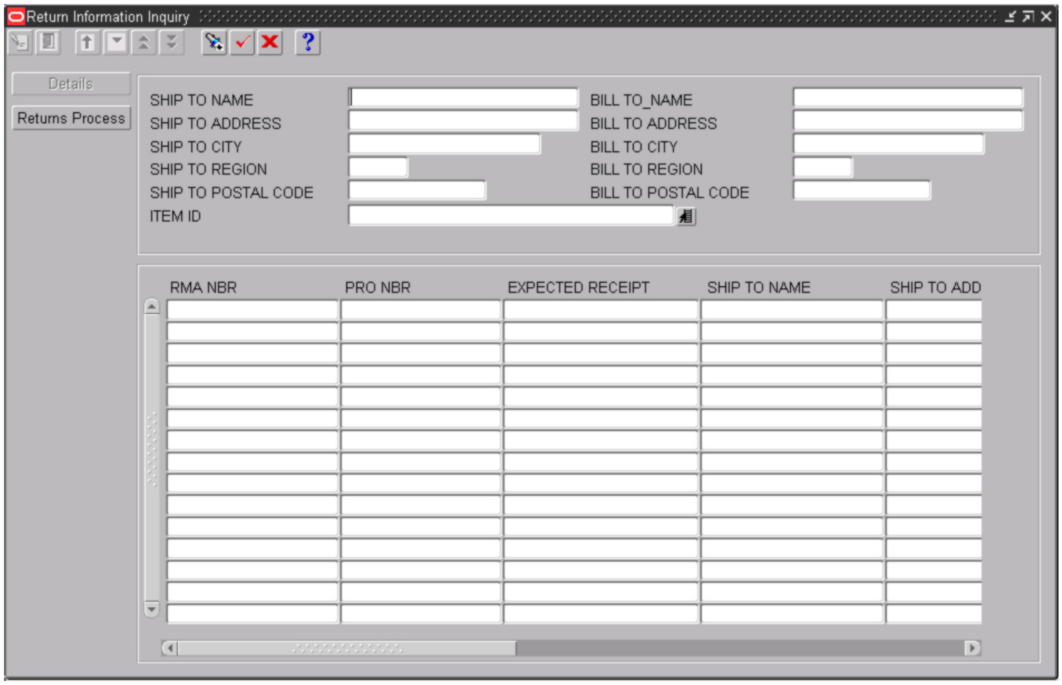
2. In the Destype field, select the type of destination.
3. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

4. To view the layout of the report, click on the Layout tab.
5. Click **Save**. The report is sent to the selected destination.

# View Returns

**Navigate:** From the main menu, select Returns > Return Information Inquiry. The Return Information Inquiry window opens.




**Return Information Inquiry Window**

## Display One or Multiple Returns

1. If any returns are currently displayed, click the clear button.
2. Click the enter query button.
3. Enter criteria in one or more of the query fields.
4. Click the execute query button. The returns that match the criteria appear.

## View the Details of a Return

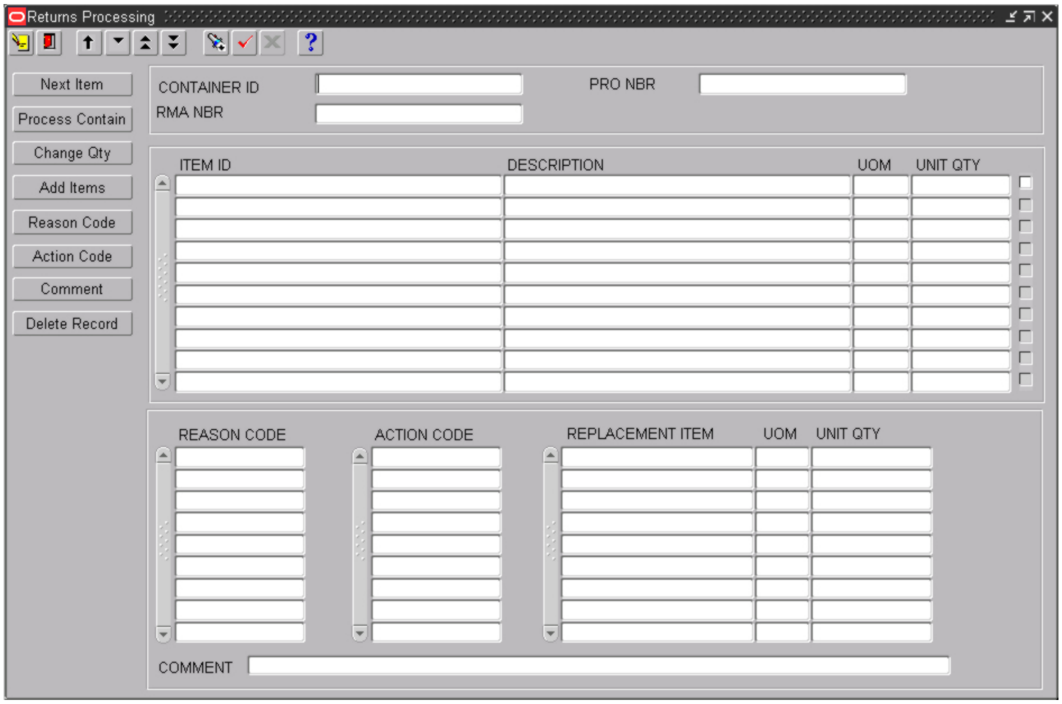
1. On the Return Information Inquiry window, select the return that you want to view in detail.
2. Click **Details**. The items to be returned appear on the Detail Information window.
3. Click **Exit/Cancel** to close the Detail Information window.

## Exit the Return Information Inquiry Window

- Click the exit button to close the window.

# Process Returns

**Navigate:** From the main menu, select Returns > Return Processing. The Returns Processing window opens.




**Returns Processing Window**

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**Note:** You can also access this window from the Return Information Inquiry window.

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## Display a Return

1. If a return is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Container ID field, enter the ID of the returned container, or click the LOV  button and select the container.
4. In the RMA Nbr field, enter the RMA number if it is not automatically entered.
5. In the PRO Nbr field, enter the carrier assigned PRO number, or click the LOV  button and select the PRO number.
6. Click the execute  query button. The details of the return appear.

## Process the Return

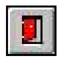
1. On the Returns Processing window, select the item that you want to process.
2. To add a reason for the return:
   a. Click **Reason Code**. The Add Reason Codes window opens.
   b. In the Reason Code field, enter the code for the reason, or click the LOV button and select the reason.
   c. Click **Save** to save the changes and close the Add Reason Codes window.
3. To indicate what action should be taken with the return:
   a. Click **Action Code**. The Add Action Codes window opens.
   b. In the Action Code field, enter the action code, or click the LOV button and select the action code.
   c. If you choose to replace the item, click **Replace**. The Add/Modify Items window opens.
   d. In the Item ID field, enter the ID of the replacement item, or click the LOV button and select the item.
   e. In the Unit Qty field, enter the replacement number of units.
   f. Click **Save** to save the changes and close each window.
4. After all the reason codes, action codes, and replacement items are entered, choose one of the following tasks:
   - To process another item from the same return, click **Next Item**. The Process Items window opens.
   - To process a completed return, click **Process Contain**. The Process Items window opens.
5. In the Disposition Code field, enter the disposition code, or click the LOV button and select the disposition code.
6. If the container may be returned to inventory, enter a container ID in the Container ID field.
7. If you entered a container ID, enter the appropriate WIP code in the WIP code field, or click the LOV button and select the WIP code. (This step is optional.)

> **Note:** To enter multiple WIP codes, click **Process** after entering each WIP code.

8. Click **Save** to save the changes and close the Process Items window.
    - If you accessed the window by clicking **Next Item**, the action codes, reason codes, and replacement items are cleared from the Returns Processing window. You can process the next returned item.
    - If you accessed the window by clicking **Process**, all fields on the Returns Processing window are cleared. You can process another return or close the window.

> **Note:** After a return is processed, inventory is adjusted to include the returned item. A message is sent to the host system to notify it of the transaction.

## Exit the Returns Processing Window

- Click the exit  button to close the window.

# 5

# Processing

## Processing Overview

WIP (work in process) codes may be assigned to containers in order to direct personnel in the distribution center to perform value added services to the contents of the container. The system understands from the WIP code where the container must be staged in order for a certain activity to be performed on the container.

In the processing module, you can accomplish the following tasks:

- Assign WIP codes to containers.
- Process WIP code activities.
- Verify that the WIP codes were processed.

### Business Process

WIP codes may be assigned to individual containers. As an alternative, you can apply a WIP code to all containers that are associated with an appointment, ASN, purchase order, item, location, distro, wave, or destination. It is necessary to assign the WIP codes in sequential order; that is, in the order that the work must be performed.

Merchandise is routed to the staging location for each WIP on a container's WIP list in sequential order. When the activity required by a WIP code is performed, the DC personnel must indicate when the activity was started and when it was finished. These time stamps allow the system to track the status of each WIP code.

The status of a WIP code may be:

- Next: An activity has not been started, but the previous WIP code in the WIP list is Closed.
- Open: An activity has not yet been started.
- In progress: A start time has been entered for the activity, but not an end time.
- Closed: An end time has been entered for the activity.

Before merchandise is placed in inventory or shipped, a quality check can be performed. During the quality check, you can assign trouble codes as necessary, request hot picks for shorted orders, adjust quantities, or record dimensions and attributes for containers and items.

### Reports

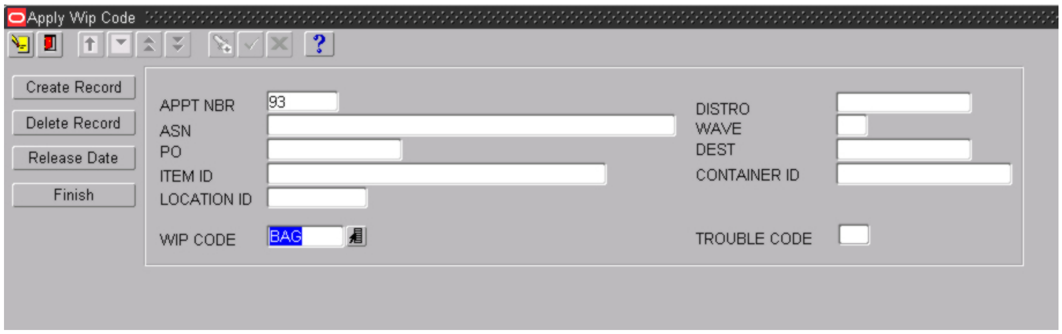
The following reports are available in the Processing module:

- Activity Based Cost report: Provides a list of costs by activity 1) for a selected range of dates or 2) from the date of the last report.
- Gift Card report: Provides a personalized gift card for a specified item ordered by a customer.
- Personalization report: Provides instructions for personalizing an item ordered by a customer.
- Trouble Location report: Provides a list of locations where containers with a specified trouble code can be found.

- Vendor Compliance report: Provides details about troubled merchandise by vendor for a range of dates.
- WIP Tracking Location report: Provides a list of locations where containers with a specified WIP code can be found. A date and time stamp indicates the processing time.

# Maintain WIP Lists for Multiple Containers

**Navigate:** From the main menu, select Processing > Apply WIP Code. The Apply WIP Code window opens.

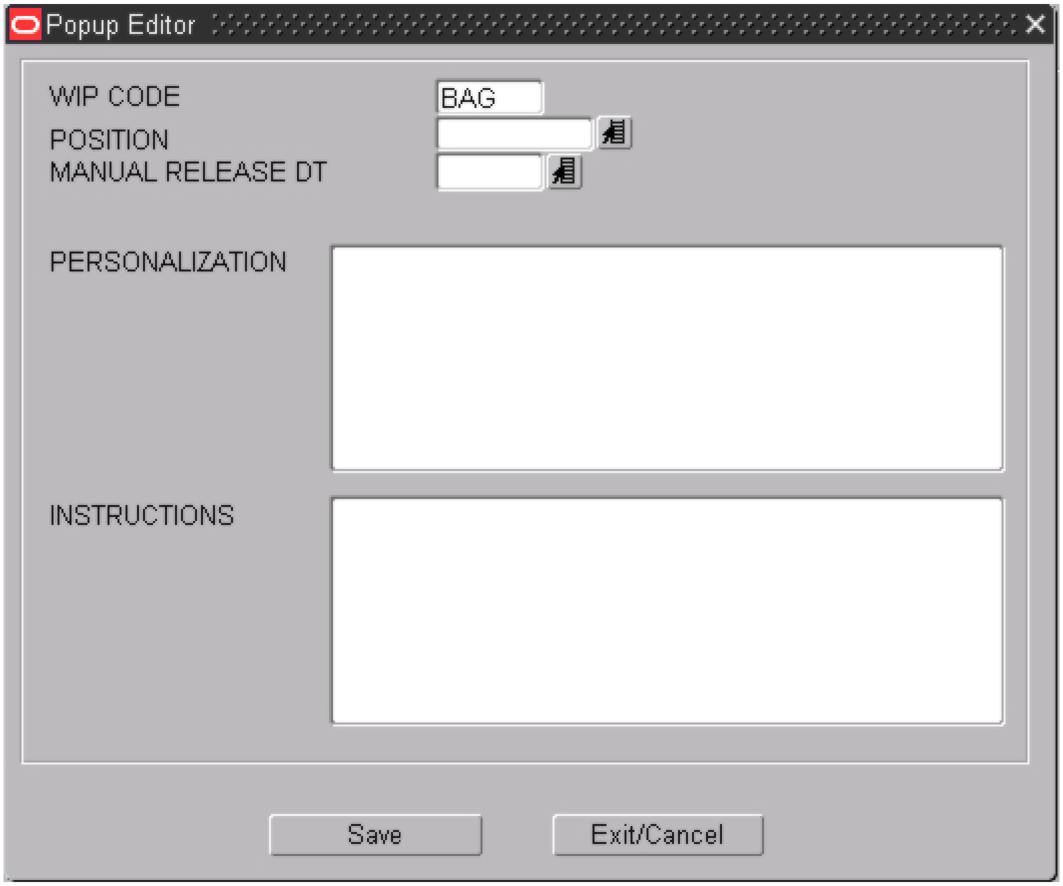



**Apply WIP Code Window**

## Add a WIP Code to Multiple Containers

> **Note:** WIP codes can not be assigned to containers in Manifested (M) or Shipped (S) status.

1. On the Apply WIP Code window, enter the criteria for the set of containers that you want to edit.
2. In the WIP Code field, enter the WIP code, or click the LOV  button and select the WIP code.
3. Click **Create Record**. The Popup Editor window opens.




**Popup Editor Window**

4. In the Position field, enter the sequence for the task, or click the LOV button and select the sequence. Select Next to make the WIP the next to be processed. Select Last to place it after the last WIP.
5. Click **Save**.
6. When prompted to continue, click **Yes**.

## Delete a WIP Code from Multiple Containers

1. On the Apply WIP Code window, enter the criteria for the set of containers that you want to edit.
2. In the WIP Code field, enter the WIP code, or click the LOV button and select the WIP code.
3. Click **Delete Record**.
4. When prompted to continue, click **Yes**.

## Add a Trouble Code to Multiple Containers

> **Note:** Trouble codes may be added to containers with a status of Appointed (A), Inventory (I), Distributed (D), or Troubled (T).

1. On the Apply WIP Code window, enter the criteria for the set of containers that you want to edit.
2. In the Trouble Code field, enter the trouble code, or click the LOV button and select the trouble code. The WIP code associated with the trouble code is automatically entered.
3. Click **Create Record**.
4. When prompted to continue, click **Yes**.

## Delete a Trouble Code from Multiple Containers

1. On the Apply WIP Code window, enter the criteria for the set of containers that you want to edit.
2. In the Trouble Code field, enter the trouble code, or click the LOV button and select the trouble code.

> **Note:** Deleting a trouble codes does not cause its associated WIP code to be deleted.

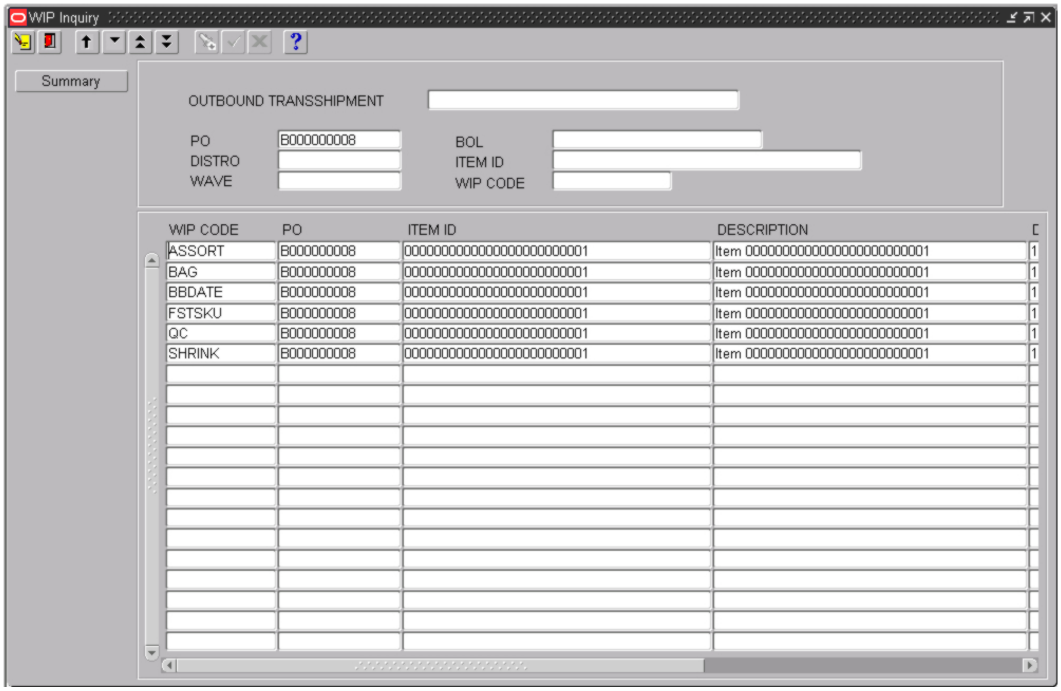
3. Click **Delete Record**.
4. When prompted to continue, click **Yes**.

## Exit the Apply WIP Code Window

- Click the exit button to close the window.

# View Open WIP Codes

**Navigate:** From the main menu, select Processing > WIP Inquiry. The WIP Inquiry window opens.




**WIP Inquiry Window**

## Display all Open WIP Codes

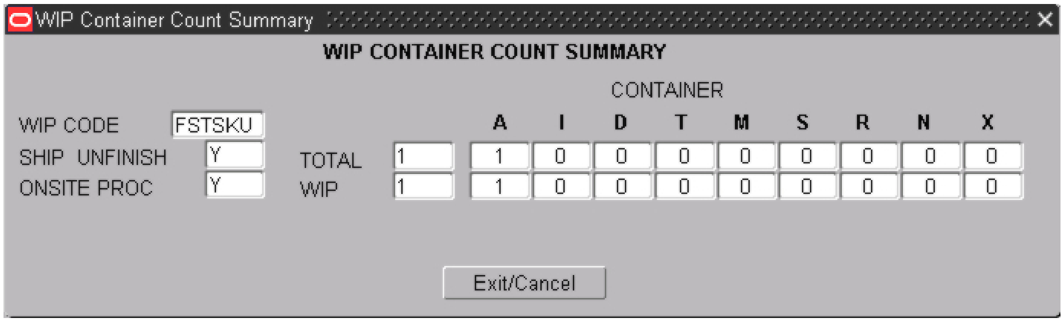
- Click the execute query  button.

## Display a Subset of the Open WIP Codes

1. If any WIP codes are currently displayed, click the clear  button.
2. In one or more of the query fields, enter the desired criteria.
3. Click the execute  query button. The open WIP codes that match the criteria appear.

## View Open WIP Codes by Container Status

1. On the WIP Inquiry window, select the WIP code for which you want to view a summary.
2. Click **Summary**. The container count is summarized in the WIP Container Count Summary window.

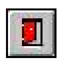



**WIP Container Count Summary Window**

> **Note:** The container status may be: Appointed (A), Inventory (I), Distributed (D), Troubled (T), Manifested (M), Shipped (S), Return to vendor (R), Not Saleable (N), and Expired (X).

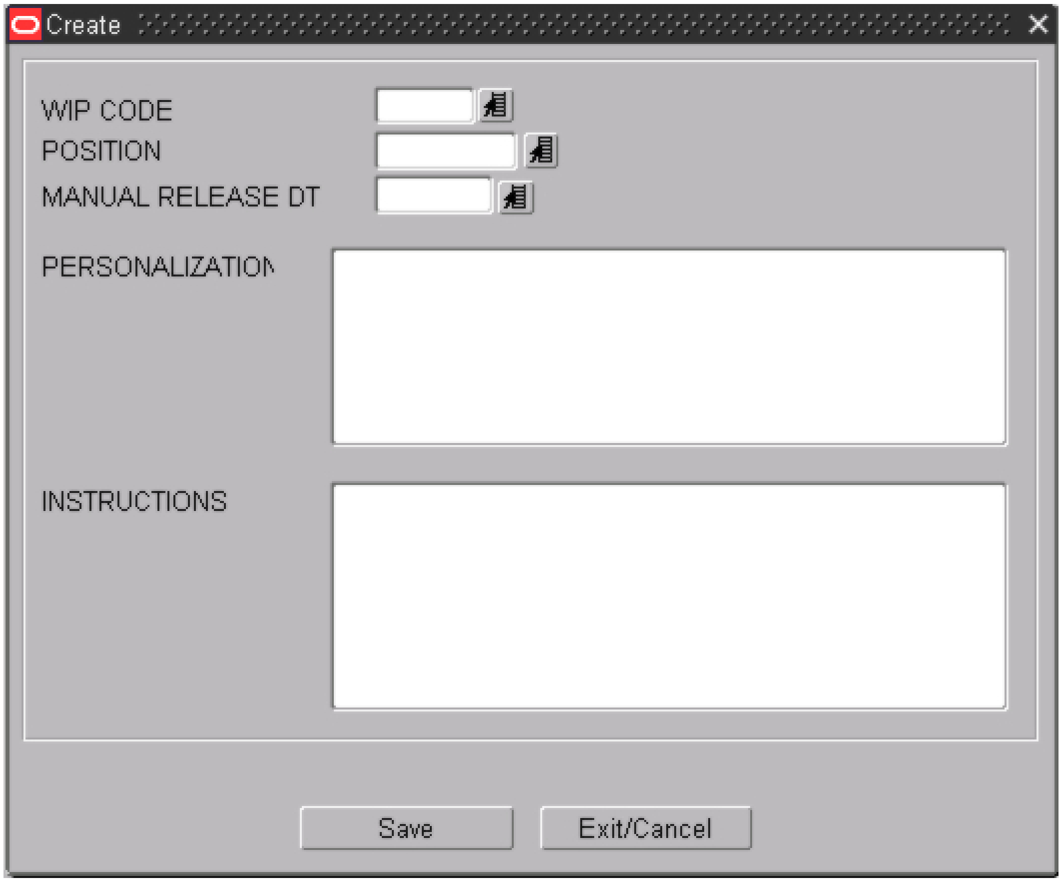
3. Click **Exit/Cancel** to close the WIP Container Count Summary window.

## Exit the WIP Detail Window

- Click the exit  button to close the window.

# Maintain WIP Lists by Container

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Container WIP Editor. The Container WIP Editor window opens.




**Container WIP Editor Window**

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**Note:** You can also access this window from the Stock Order Inquiry Screen window.

---

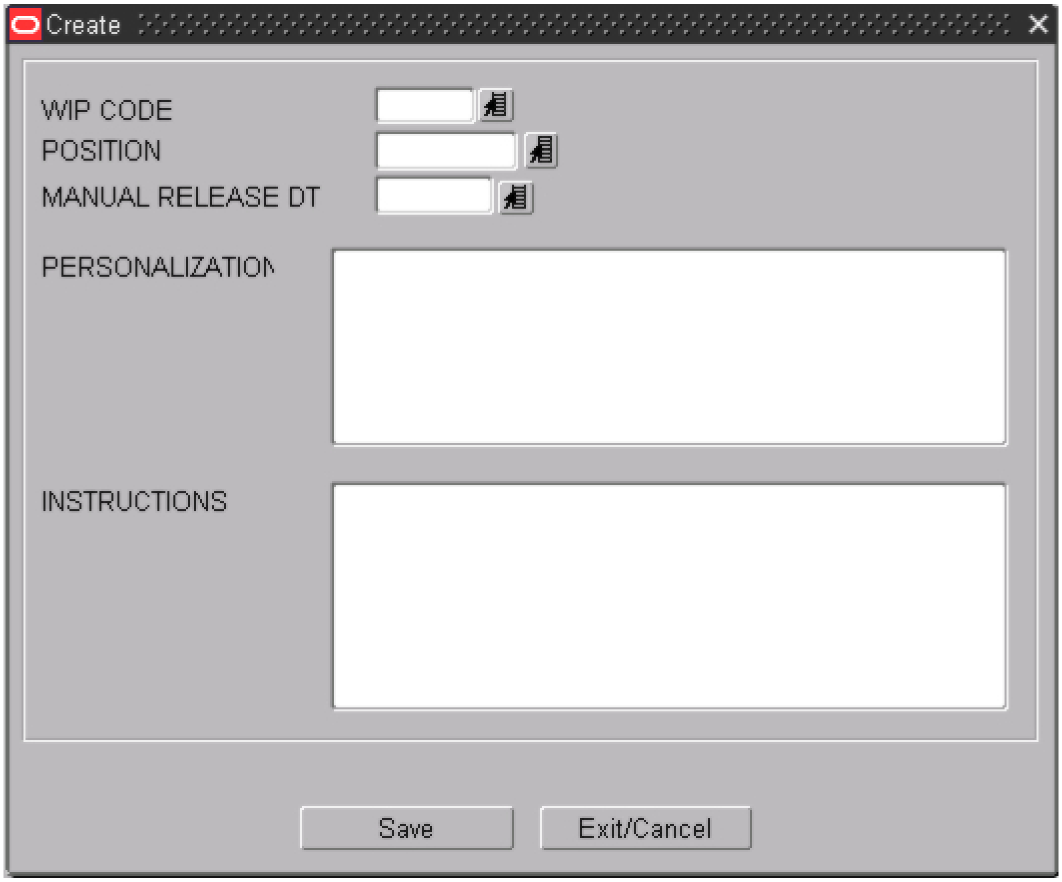
## Display the WIP List for a Container

1. If the WIP list for a container is currently displayed, click the clear button.
2. Click the enter query button.
3. In the Container ID query field, enter a container ID, or click the LOV button and select the container.
4. Click the execute query button. The WIP list for the specified container is displayed.

## Add a WIP Code to the WIP List

**Note:** If you do not want the new WIP code to be placed last in the list, select the WIP code that should precede the new one before you begin this procedure.

1. On the Container WIP Editor window, click **Create Record**. The Create window opens.



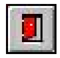

**Create Window**

2. In the WIP code field, enter the WIP code, or click the LOV  button and select the WIP code.
3. In the Position field, enter the sequence for the task, or click the LOV  button and select the sequence.
   - Select Next to place the WIP code after the selected WIP code.
   - Select Last to place the WIP code at the end of the WIP list.
4. Click **Save**.

## Delete a WIP Code from the WIP List

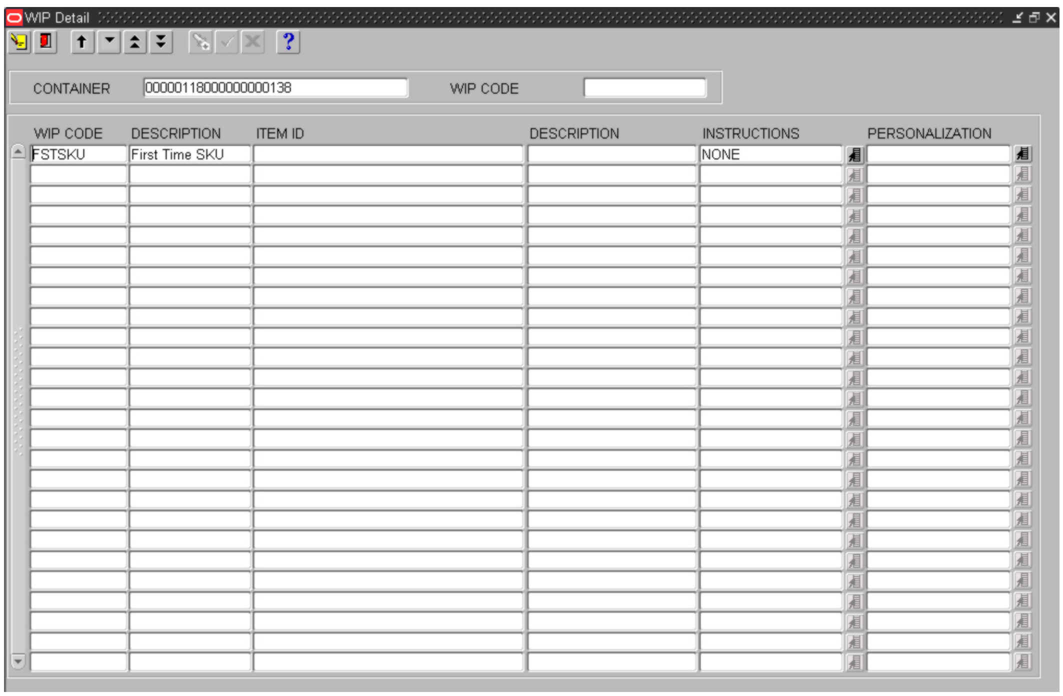
1. On the Container WIP Editor window, select the WIP code that you want to delete from the WIP list.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Exit the Container WIP Editor Window

- Click the exit  button to close the window.

# View WIP Details by Container

**Navigate:** From the main menu, select Processing > Container WIP Details. The WIP Detail window opens.




**WIP Detail Window**

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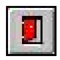
**Note:** You can also access this window from the Container WIP Editor window.

---

## Display the WIP List for a Container

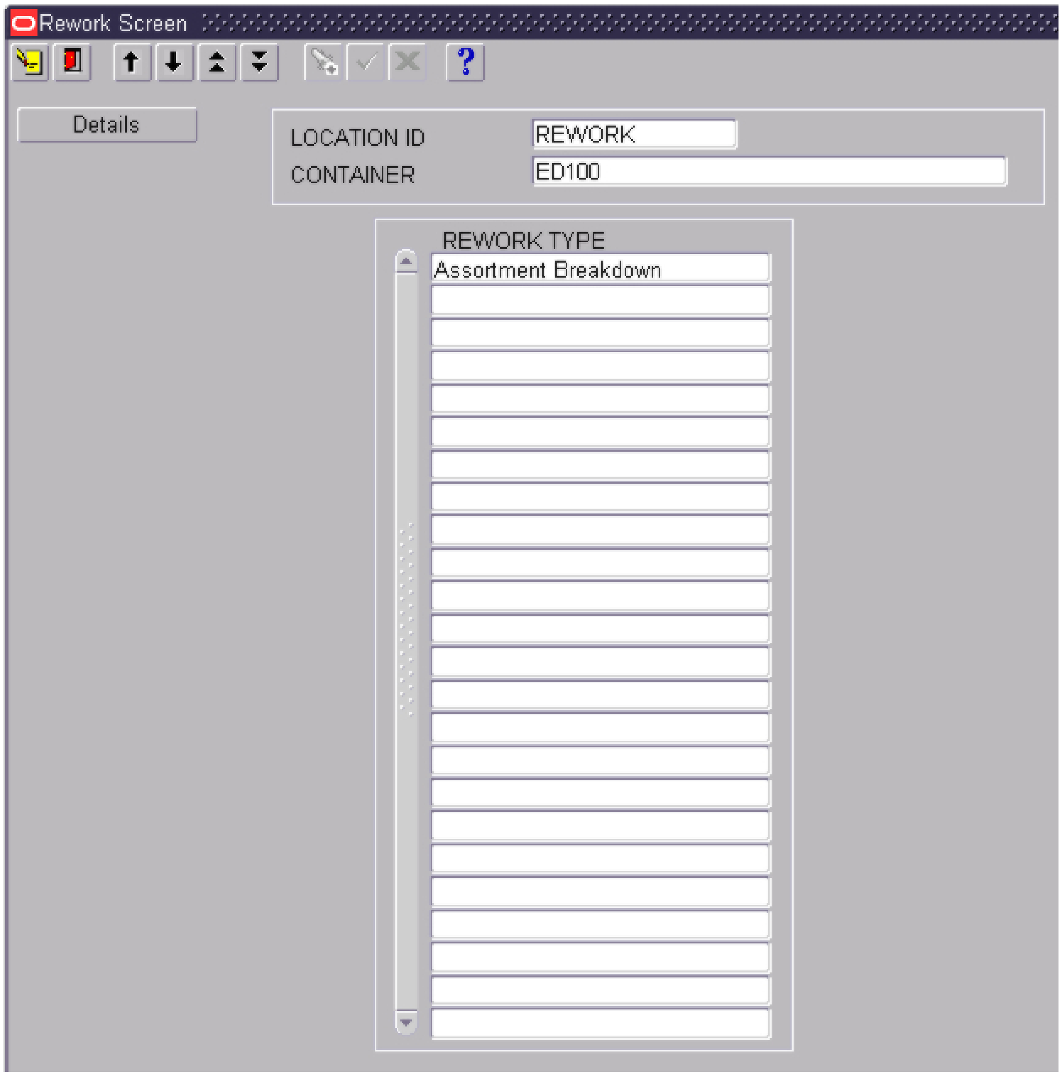
1. If the WIP list for a container is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Container ID query field, enter a container ID, or click the LOV  button and select the container.
4. Click the execute  query button. The WIP list for the specified container is displayed.

## Exit the WIP Detail Window

- Click the exit  button to close the window.

# Process WIP Codes

**Navigate:** From the main menu, select Processing > Rework. The Rework Screen window opens.




**Rework Screen Window**

## Display the WIP List for a Container

1. If the WIP list for a container is currently displayed, click the clear button.
2. Click the enter query button.
3. In the Location ID query field, enter the ID of a staging location, or click the LOV button and select the location.
4. In the Container query field, enter the container ID.

5. Click the execute  query button. The descriptions of the WIPs associated with the selected container appear. They appear in the order in which the processing must be performed.

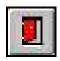
## Process a WIP

1. On the Rework Screen window, select the WIP that you want to process.
2. Click **Details**. Depending on the type of WIP, one of the following windows opens.
   - Quality Assurance: Process containers for quality assurance.
   - Multi SKU: Process multi-SKU containers.
   - Carton Process: Process packaged cartons.

After exiting any of the above windows, you are returned to the Rework Screen window. The processed WIP no longer appears on the WIP list.

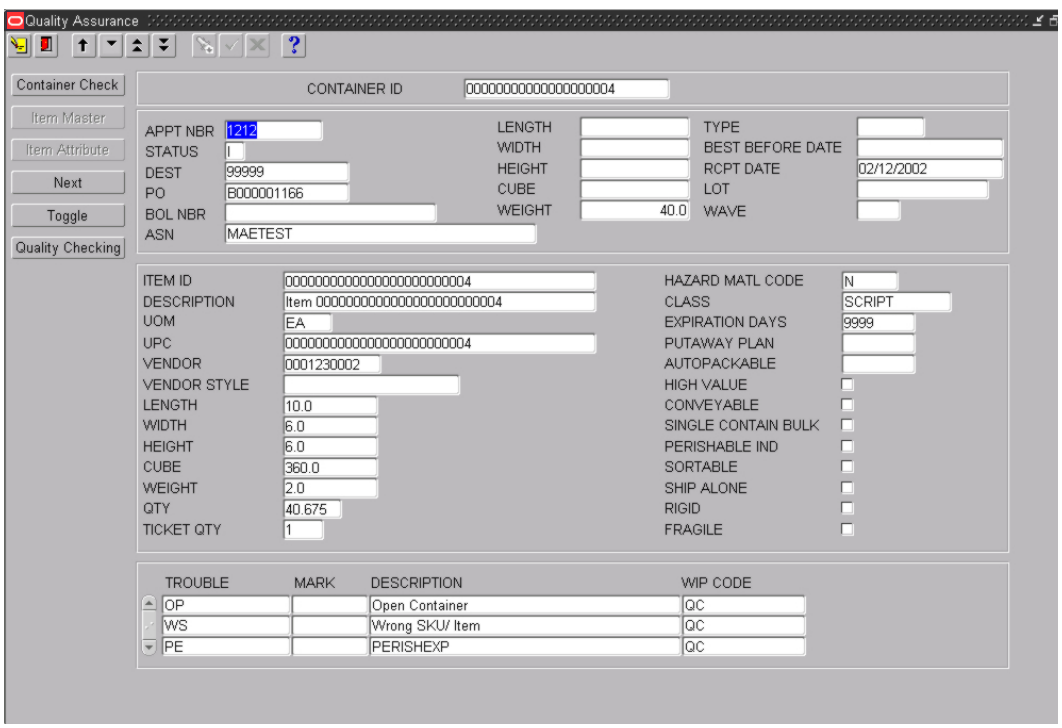
3. Continue processing until no WIPs appear on the WIP list.

## Exit the Rework Screen Window

- Click the exit  button to close the window.

# Process Containers for Quality Assurance

**Navigate:** From the main menu, select Processing > Quality Assurance. The Quality Assurance window opens.




**Quality Assurance Window**

**Note:** You can also access this window from the Rework Screen window.

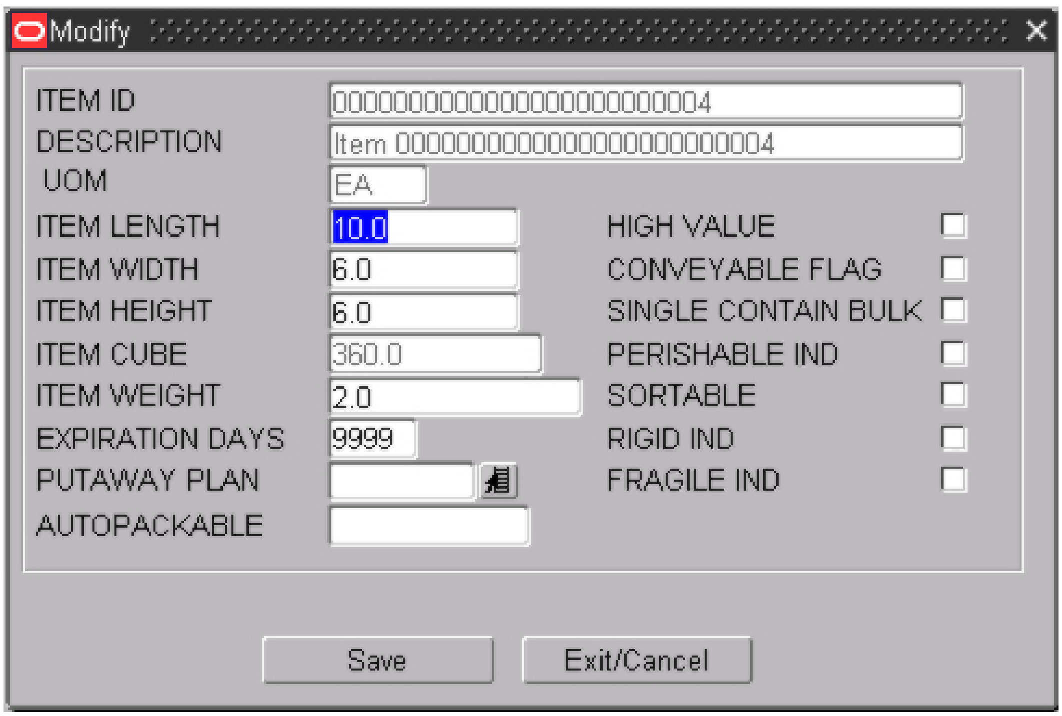
## Display Container Details

1. If the details of a container are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Container ID query field, enter a container ID, or click the LOV button and select the container.
4. Click the execute query button. The details for the specified container are displayed.

> **Note:** There are four blocks in this window. From top to bottom, they are referred to as the Query block, Container block, Item block, and Trouble Codes block.

## Edit Container Details

1. On the Quality Assurance window, click **Next** to place the cursor in the Container block.
2. Double-click any field in the Container block. The Modify window opens.

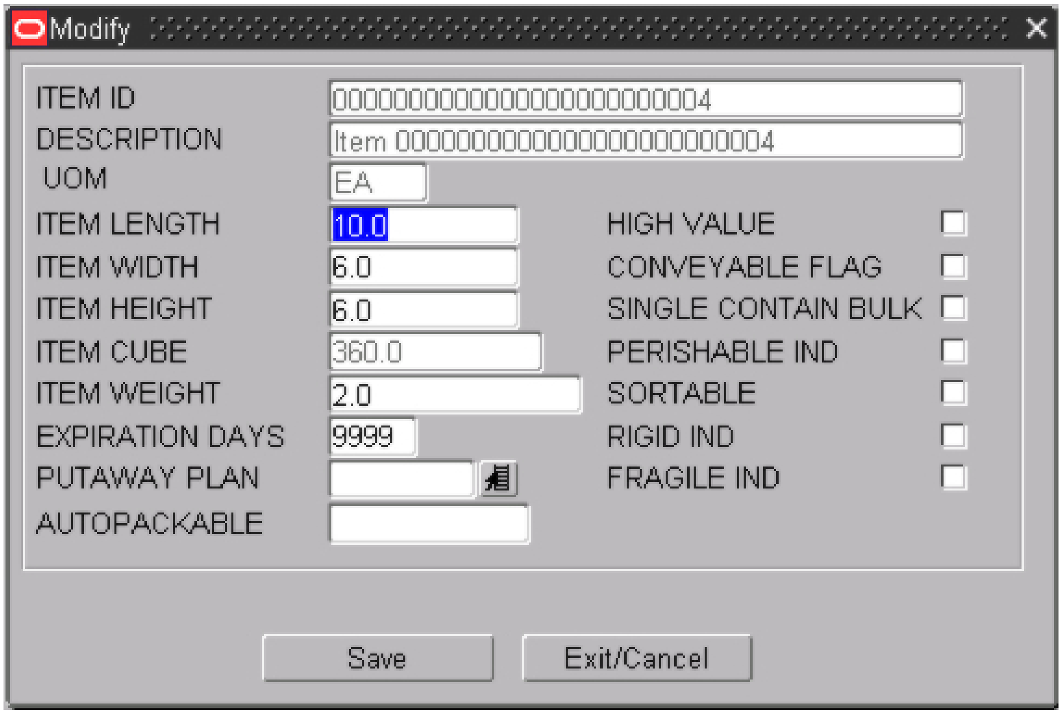



**Modify Window**

3. Edit the dimensions, weight, lot number, and best before date as necessary.
4. Click **Save** to save any changes and close the Modify window.

## Edit Item Details

1. On the Quality Assurance window, click **Next** to place the cursor in the Item block.
2. Double-click any field, in the Item block. The Modify window opens.




**Modify Window**

3. Edit the dimensions, weight, and additional details as necessary.
4. Click **Save** to save any changes and close the Modify window.

## Assign Trouble Codes to the Container

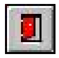
1. On the Quality Assurance window, click **Next** to place the cursor in the Trouble Codes block.
2. Select the trouble code that you want to assign to the container.
3. Click **Toggle**.
4. When prompted to confirm the action, click **Yes**. A 'Y' (Yes) appears in the Mark field to indicate that the trouble code is assigned to the container.

> **Note:** To clear a marked trouble code, select the trouble code and click **Toggle**. The 'Y' no longer appears in the Mark field.

## Process the Quality Assurance Check

1. On the Quality Assurance window, click **Next** to place the cursor in the Container block.
2. Click **Quality Checking**. The QA check is completed and the fields are cleared.

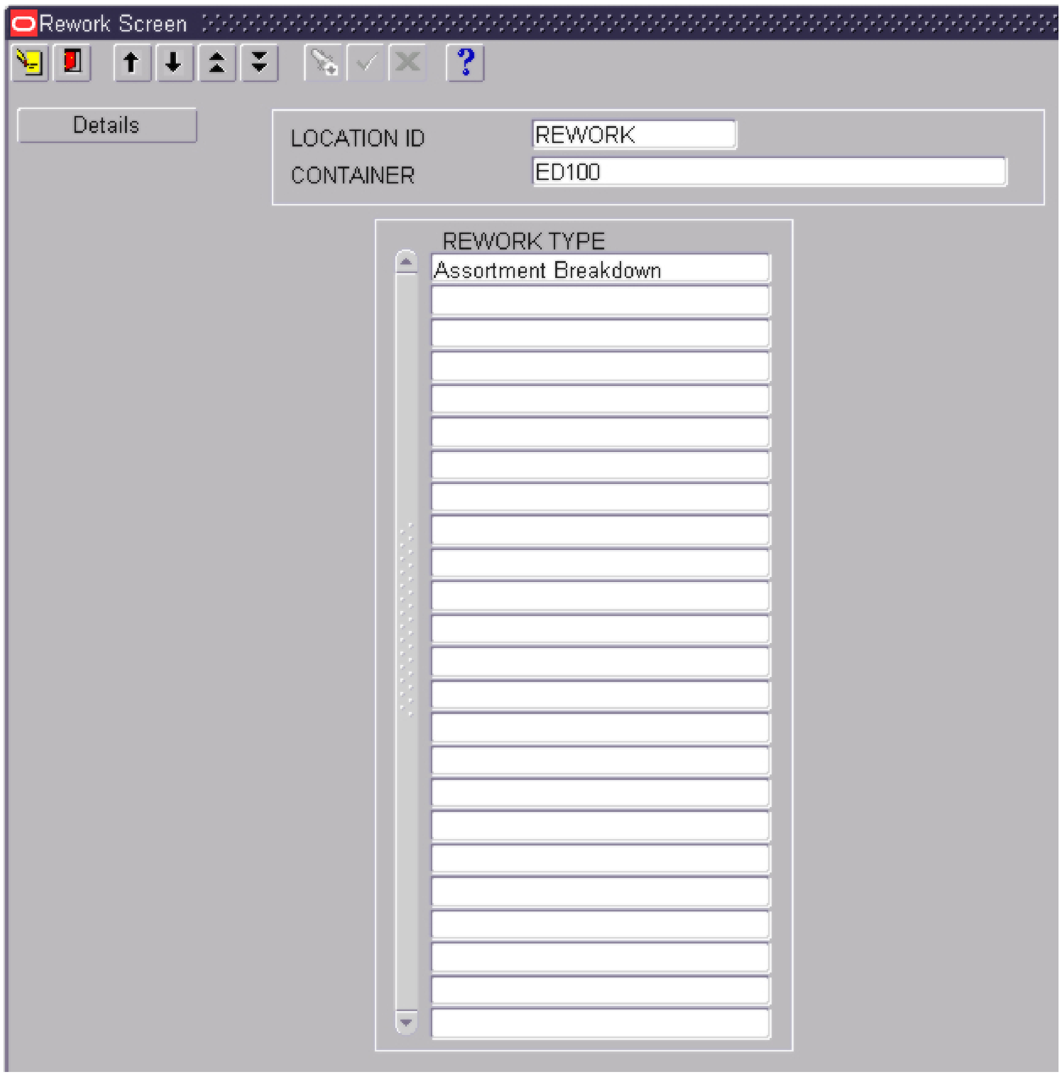
### Exit the Quality Assurance Window

- Click the exit  button to close the window.

## Process Multi-SKU Containers

**Navigate:** From the main menu, select Processing > Rework. The Rework Screen window opens.

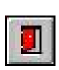
Select a WIP pertaining to assortments or break packs. Click the **Details** button. The Multi SKU window opens.




**Rework Screen window**

1. On the Multi SKU window, verify that the details are correct.
2. When the assortment or break pack task is done, click **Process WIP**. You are returned to the Rework Screen window. The selected WIP code is removed from the WIP list.

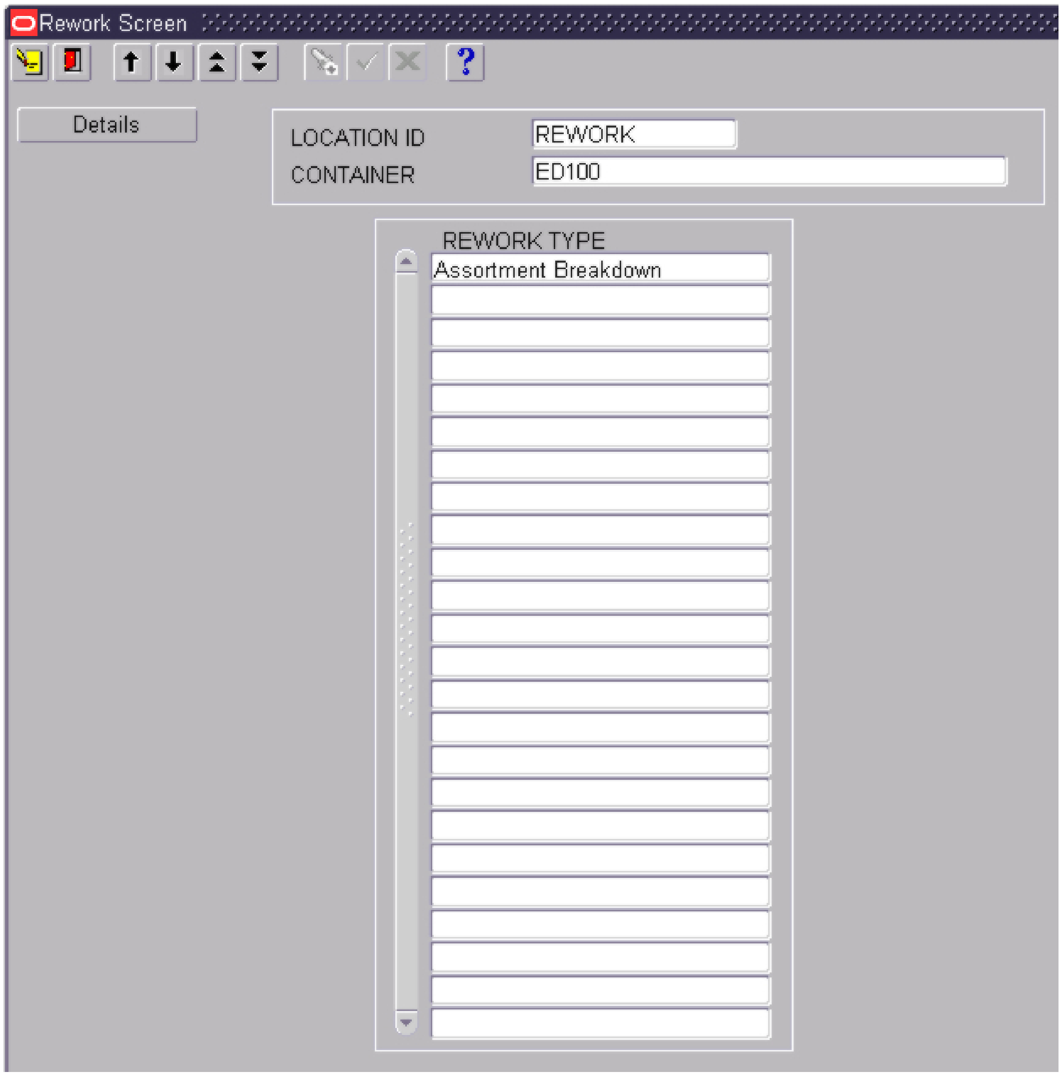
### Exit the Multi SKU Window

- Click the exit  button to close the window.

# Process Packaged Cartons

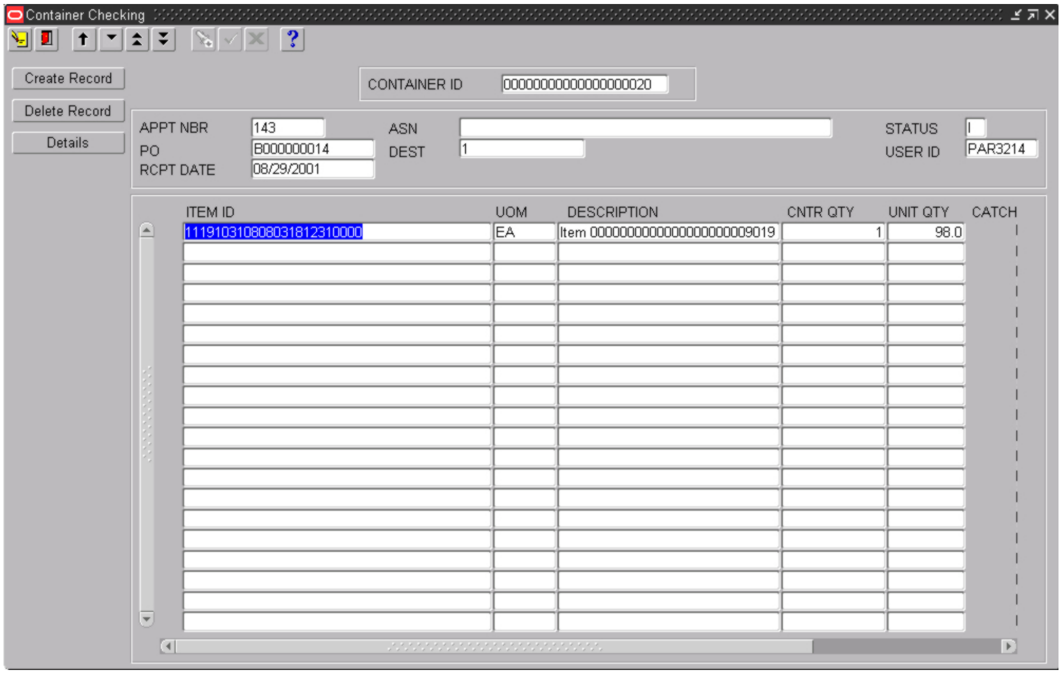
**Navigate:** From the main menu, select Processing > Rework. The Rework Screen window opens.

Select a WIP pertaining to bagging or shrink-wrapping a carton. Click the **Details** button. The Carton Process window opens.

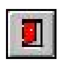



**Rework Screen Window**

1. On the Carton Process window, verify that the details are correct.
2. If any adjustments must be made to inventory:
   a. Click **Container Check**. The Container Checking window opens.



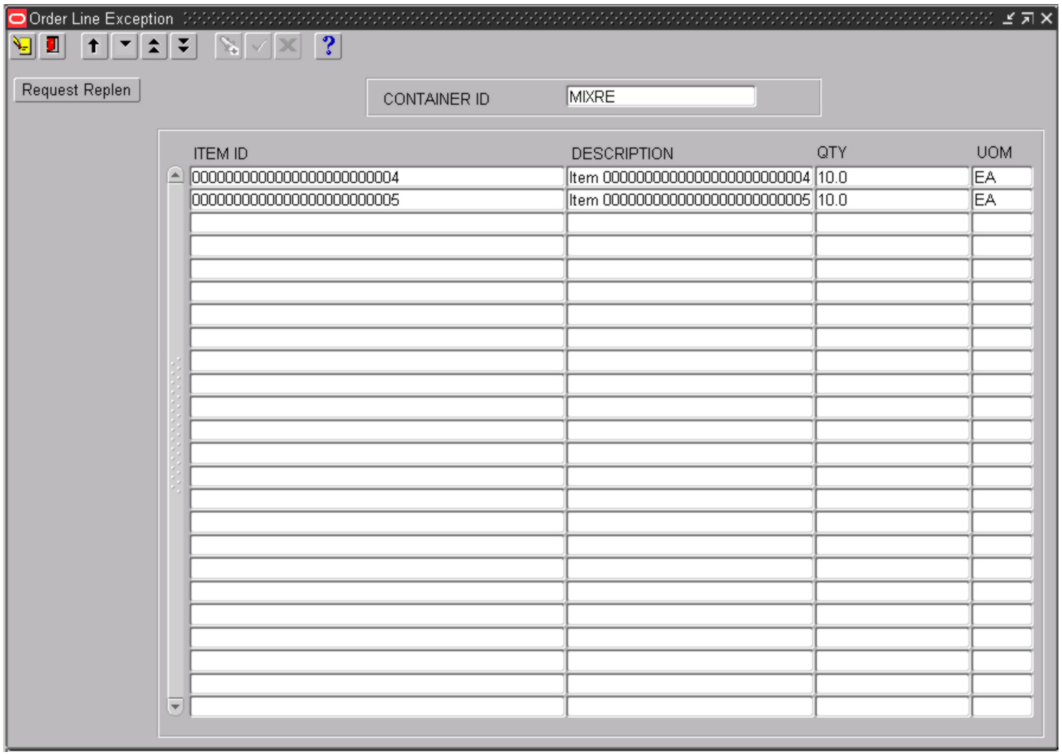

**Container Checking Window**

- **b.** Edit the container or items as necessary.
- **c.** Click the exit  button to close the Container Checking window. You are returned to the Carton Process window.

**3.** When the packaging activity is done, click **Process WIP**. You are returned to the Rework Screen window. The selected WIP code is removed from the WIP list.

# Request Hot Picks

**Navigate:** From the main menu, select Processing > Order Line Exception. The Order Line Exception window opens.



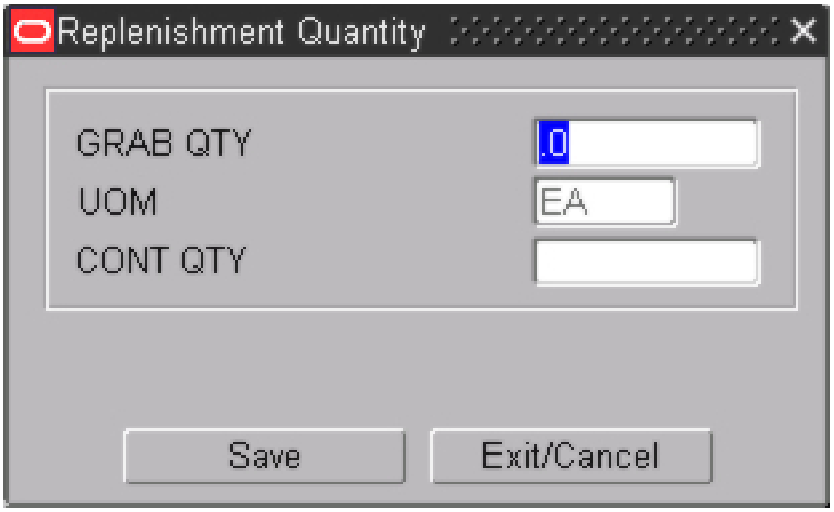

**Order Line Exception Window**

## Display the Contents of an Outbound Container

1. If the contents of a container are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Container ID query field, enter a container ID, or click the LOV button and select the container.
4. Click the execute query button. The contents of specified container appear.

## Request a Hot Pick

1. On the Order Line Exception window, select the item with the shorted quantity.
2. Click **Request Replen**. The Replenishment Quantity window opens.



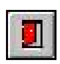

**Replenishment Quantity Window**

3. In the Grab Qty field, enter the number of units that are needed.
4. In the Cont Qty field, enter the number of units that are already in the container.

> **Note:** The container quantity and grab quantity can not exceed the expected quantity.

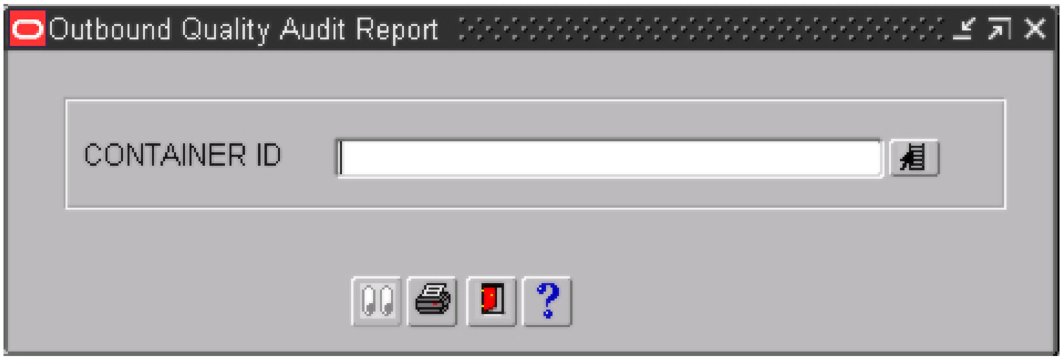
5. Click **Save**. You are prompted if insufficient inventory exists to fill the request.

## Exit the Order Line Exception Window

- Click the exit  button to close the window.

# Process Outbound Containers

**Navigate:** From the main menu, select Processing > QC Outbound Audit. The QC Outbound Audit window opens.




**QC Outbound Audit Window**

## Display the Details of an Outbound Container

1. If the details of a container are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Container ID query field, enter a container ID, or click the LOV  button and select the container.
4. Click the execute  query button. The contents of specified container appear.

## Assign a Packer to the Container

1. On the QC Outbound Audit window, double-click the Packer ID text box. The Packer Editor opens.
2. Enter the ID of the packer, or click the LOV  button and select the packer.
3. Click **Save** to save any change and close the Packer Editor window.

## Adjust the Quantity of an Item

1. On the QC Outbound Audit window, double-click the line item that you want to edit. The Modify Quantity window opens.
2. Enter the actual quantity in the container.
3. Click **Save**.
4. When prompted to create a hot pick for a shorted quantity, click **Yes** or **No** as applicable.
5. When prompted to provide a reason for the adjustment, select the reason and click **OK**.

## Process the Quality Audit

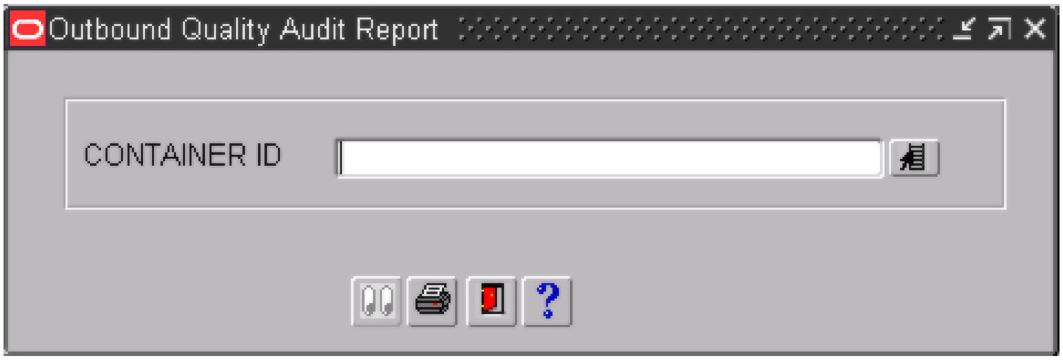
1. On the QC Outbound Audit window, click **Process Form**.
2. When prompted to confirm that the quality audit is done, click **Yes**.

### Exit the QC Outbound Audit Window

- Click the exit button to close the window.

## Process WIP Codes for Outbound Containers

**Navigate:** From the main menu, select Processing > WIP Audit Outbound. The WIP Audit Outbound window opens.




**WIP Audit Outbound Window**

**Note:** You can also access this window from the QC Outbound Audit window.

### Display the WIP List for an Outbound Container

1. If a WIP list for an outbound container is currently displayed, click the clear button.
2. Click the enter query button.
3. In the Container query field, enter a container ID, or click the LOV button and select the container.
4. Click the execute query button. The WIP list for specified container opens.

### Process a WIP Code

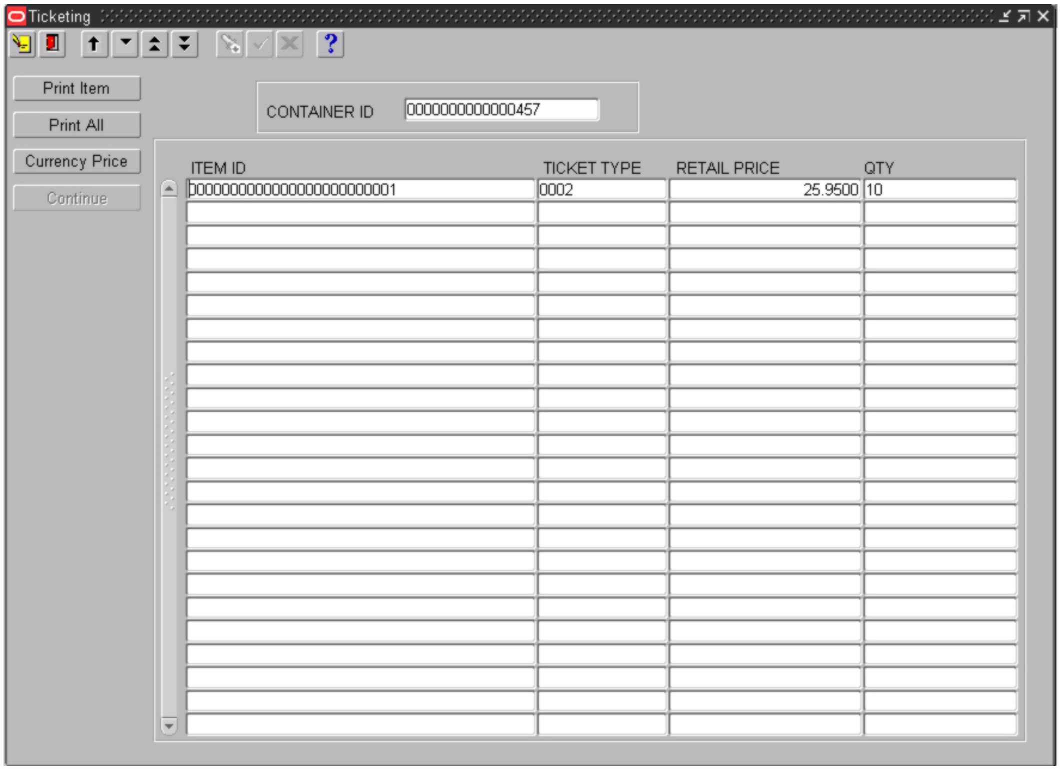
1. On the WIP Audit Outbound window, double-click the WIP code/line item that you want to edit. The WIP Editor window opens.
2. In the WIP Complete and WIP Correct fields, enter Y (Yes) or an N (No) to indicate whether the WIP was completed and completed correctly.
3. Click **Save** to save any changes and close the WIP Editor window.

### Exit the WIP Audit Outbound Window

- Click the exit button to close the window.

# Maintain Print Queues for Tickets

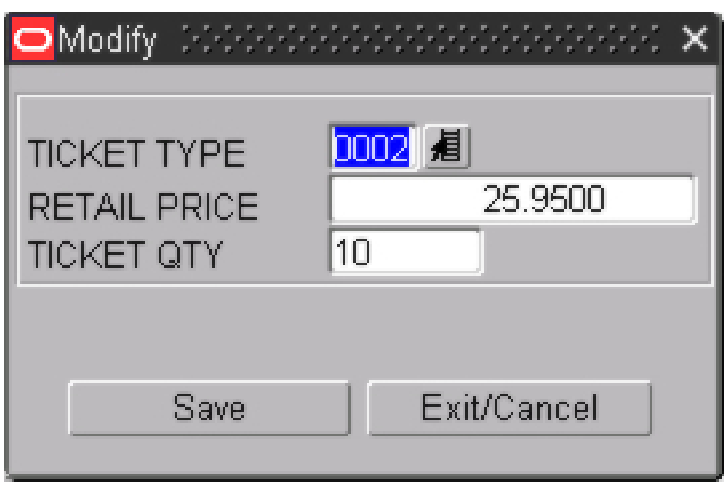
**Navigate:** From the main menu, select Processing > Ticketing. The current print queues for tickets appear in the Ticketing window.




**Ticketing Window**

## Edit a Print Queue

1. On the Ticketing window, double-click the print queue that you want to edit. The Modify window opens.



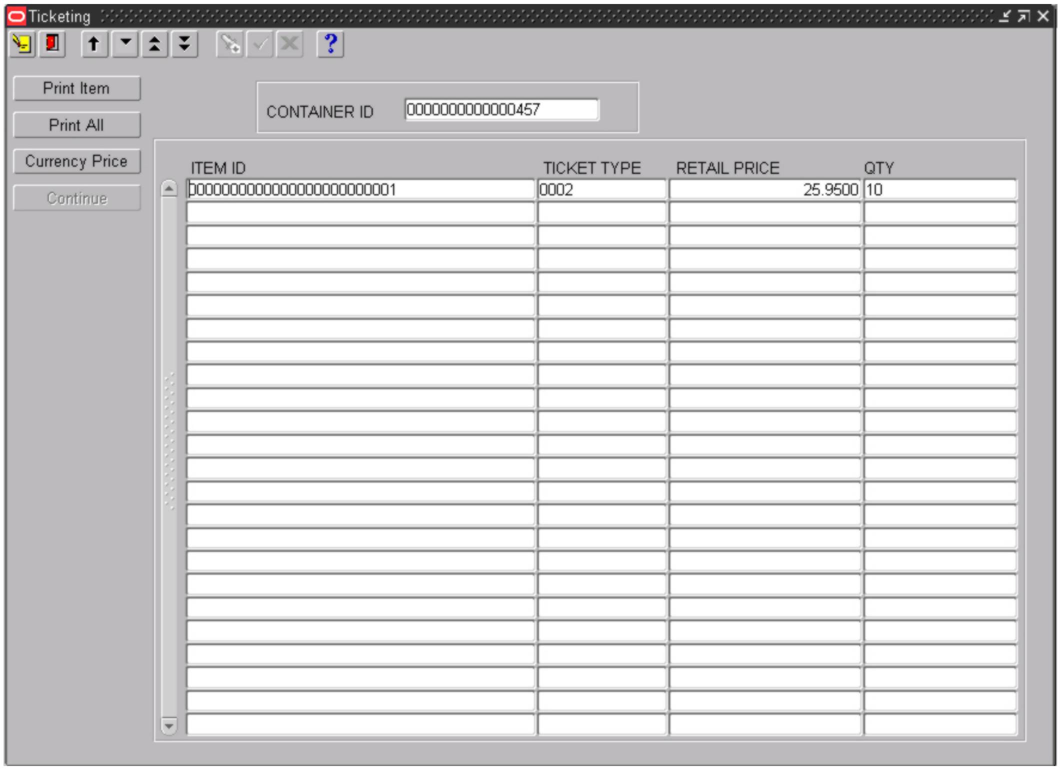

**Modify Window**

2. In the Queue field, enter the name of a print queue, or click the LOV  button and select the print queue.

3. Click **Save** to save any change and close the window.

## Display Container/Items to be Ticketed

1. On the Ticketing window, select a print queue and click **Continue**. The Ticketing (container/item) window opens.




**Ticketing (Container/Item) Window**

2. Click the enter query  button.

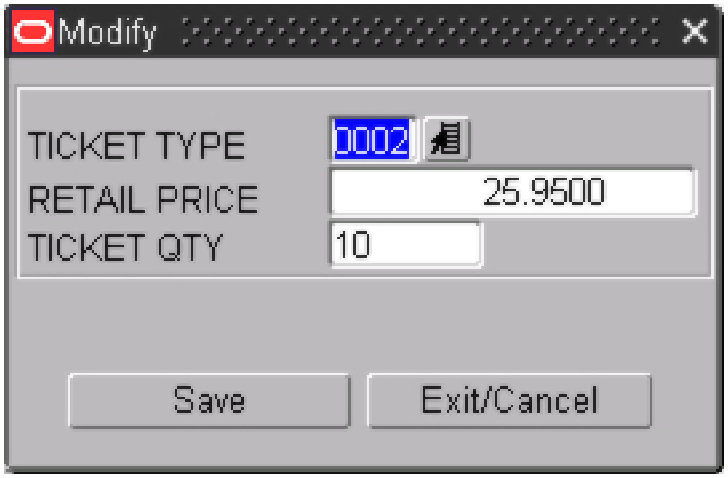
3. In the Container ID query field, enter the container ID, or click the LOV  button and select the container.

4. Click the execute query  button. The items that are associated with the container appear.

> **Note:** If the container is a master container, ticketing information opens for the labeled child containers.

## Edit Ticketing Information for a Container/Item

1. On the Ticketing (container/item) window, double-click the item that you want to edit. The Modify window opens.



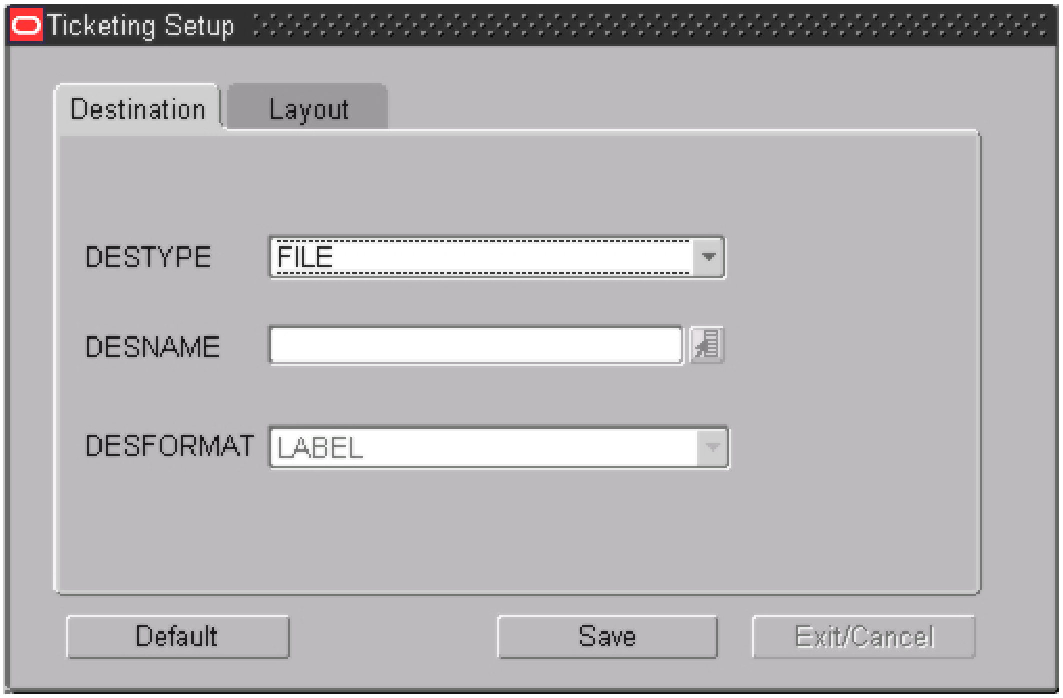

**Modify Window**

2. Edit the ticket type, retail price, and ticket quantity as necessary.
3. Click **Save** to save any changes and close the Modify window.

## Print Tickets for One or all Items in a Container

> **Note:** A trailer ticket is printed after a string of tickets are printed for a container. The user ID and container ID are printed on the trailer ticket. If a container has more than one item ID and/or ticket type, a trailer ticket is generated for each ticket type.

1. On the Ticketing (container/item) window:
   - Select an item and click **Print Item** in order to print tickets for the selected item.
   - Click **Print All** in order to print tickets for all the items.
2. When prompted to confirm the request, click **Yes**. The Ticketing Setup window opens.



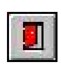

**Ticketing Setup Window**

3. In the Destype field, select the type of destination.
4. In the Desname and Desformat fields, select the name of the destination and format as necessary.

**Note:** To return to the default settings, click **Default**.

5. To view the layout of the report, click on the Layout tab.
6. Click **Save**. The tickets are sent to the selected destination.

## Exit the Ticketing Windows

- Click the exit  button to close the windows.

## Generate the Activity Based Cost Report

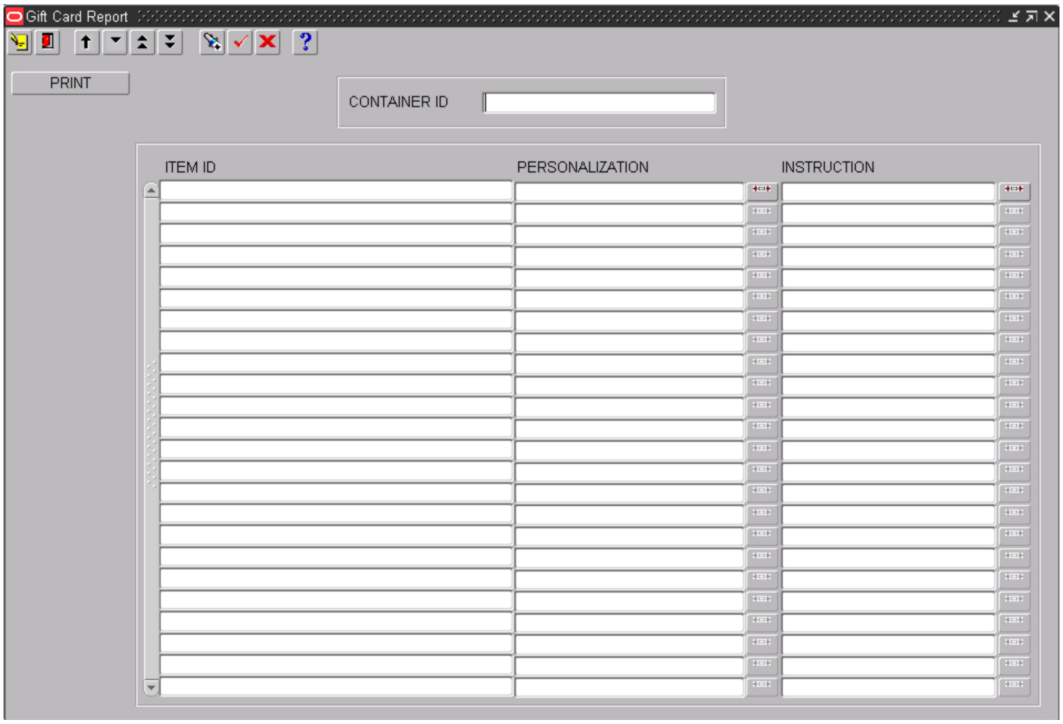
**Navigate:** From the main menu, select Processing > Reports > Activity Based Cost. The Activity Based Cost window opens.


**Activity Based Cost Window**

1. In the Report Type field, select either View Only Report or Billable Report.
2. If you select View Only Report, enter the range of dates in the Start Date and End Date fields.
3. Click the print  button. The report is sent to the default destination.

# Generate the Gift Card Report

**Navigate:** From the main menu, select Processing > Reports > Gift Card. The Gift Card Report window opens.




**Gift Card Report Window**

## Display Items by Container

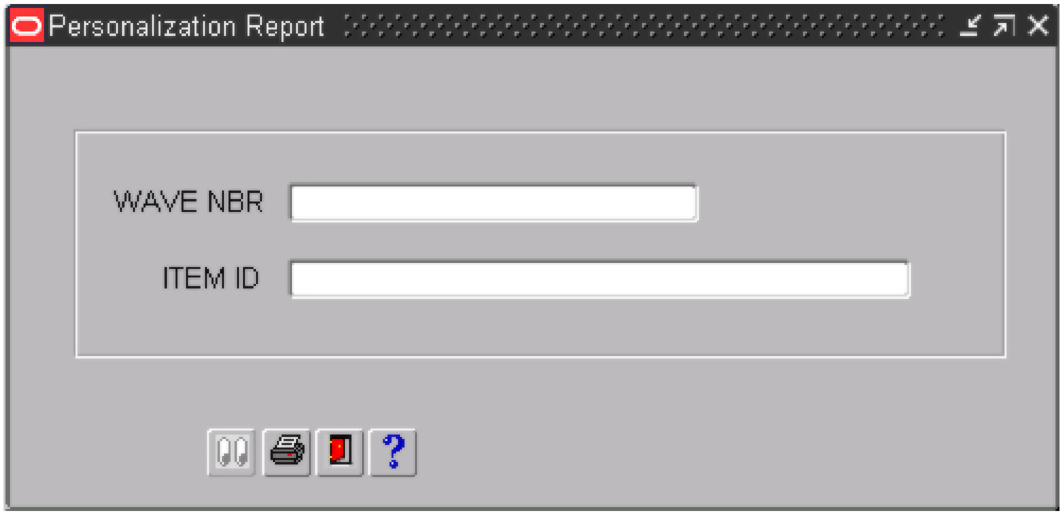
1. If items are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Container ID query field, enter the ID of the container.
4. Click the execute query  button. The items that need gift cards appear.

## Generate the Gift Card Report

1. On the Gift Card Report window, select the item that you want to process.
2. Click **Save**. The report is sent to the default destination.

## Generate the Personalization Report

**Navigate:** From the main menu, select Processing > Reports > Personalization. The Personalization Report window opens.

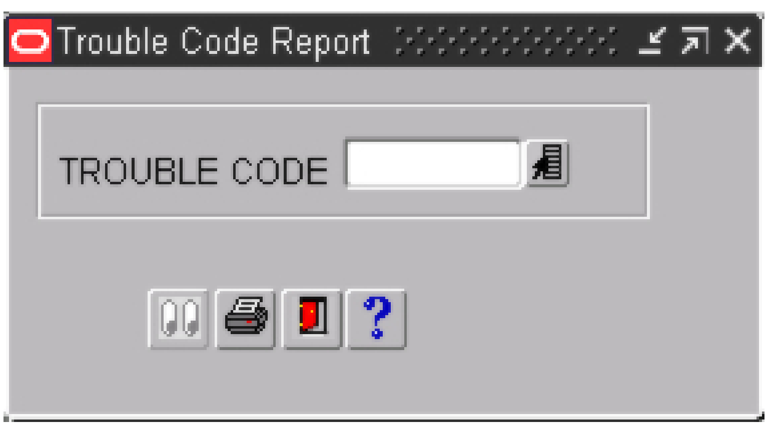



**Personalization Report Window**

1. In the Wave Nbr field, enter the wave number to be included in the report.
2. In the Item ID field, enter the ID of the item that requires personalization.
3. Click the print  button. The report is sent to the default destination.

## Generate the Trouble Location Report

**Navigate:** From the main menu, select Processing > Reports > Trouble Location. The Trouble Code Report window opens.




**Trouble Code Report Window**

1. In the Trouble Code field, select the trouble code to be included in the report.
2. Click the print  button. The report is sent to the default destination.

# Generate the Vendor Compliance Report

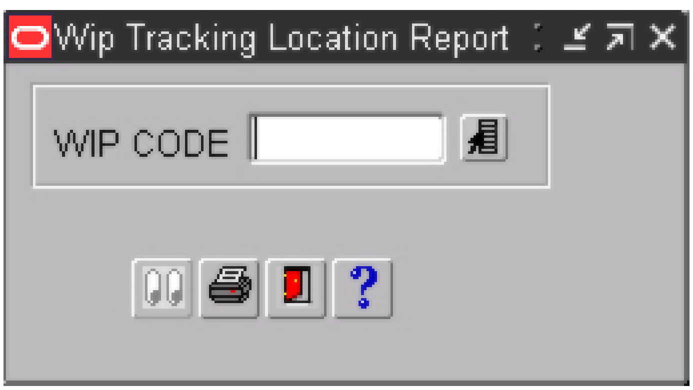
**Navigate:** From the main menu, select Processing > Reports > Vendor Compliance. The Vendor Compliance Report window opens.


**Vendor Compliance Report Window**

1. In the Start Date and End Date fields, enter the range of dates.
2. In the Vendor Nbr field, enter the vendor ID, or click the LOV  button and select the vendor.
3. Click the print  button. The report is sent to the default destination.

# Generate the WIP Tracking Location Report

**Navigate:** From the main menu, select Processing > Reports > WIP Tracking Location. The WIP Tracking Location Report window opens.




**WIP Tracking Location Report Window**

1. In the WIP Code field, enter the WIP code to be tracked, or click the LOV  button and select the WIP code.
2. Click the print  button. The report is sent to the default destination.

# 6

# Inventory Management

## Inventory Management Overview

The Inventory Management module provides you with detailed views and reports of the current inventory situation. Inventory can be maintained by container and locations can be marked for cycle counts.

Requests can be entered manually to fill forward pick locations to capacity. The system reviews other replenishment requests before determining the quantity necessary to fill such locations. You can also enter requests to deactivate or consolidate forward pick locations.

### Business Process

Inventory can be looked at in a variety of ways. You can view inventory by:

- Item: Look up where an item is stored. You can mark locations for cycle count.
- Location: Look up which items are stored in a location. You can mark the location for cycle count.
- Purchase order: Look up items that are associated with a purchase order and their current locations. You can mark locations for cycle count.
- Vendor: Look up containers that are associated with a vendor and the current locations of the containers.
- Container: Look up items by container and the current location of the container. You can view the child containers of a parent container or the parent container of a child container.
- Summaries: Look up container and unit totals by a variety of search criteria, then select how you want to view the details.

Containers and the items within them can be maintained. You can add and delete containers in inventory, add and delete the items within a container, or split an item between containers.

Items may be transferred from one item ID to another. Inventory is adjusted automatically to account for the loss of inventory under the previous item ID and the gain in inventory under the new item ID.

As new items are received from the host system, you can apply the appropriate item class to each new item. The items inherit the defaults, processes, and equipment classes of the item class to which they are assigned.

Containers can be marked for return to vendor. You can select or enter the return address for the vendor.

Paper picks can be confirmed or the pick directives may be purged from the system. This pertains to unit pick, pick to belt, and pick to pallet activities.

You can look up the locations that are marked for cycle counts. The locations may have been manually marked (MM) or system selected (SS).

Units of measure and their conversion factors can also be viewed.

### Reports

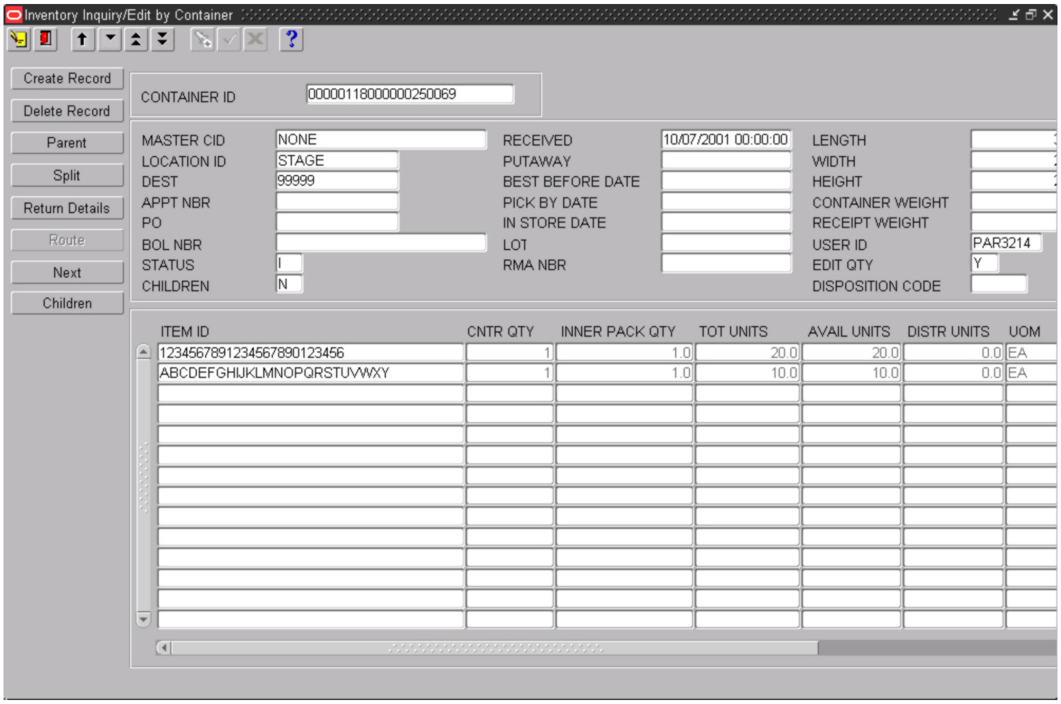
The following reports are available in the Inventory Management module:

- Best Before Date report: Provides a list of best before dates by container for a specified range of dates.
- Daily Warehouse Statistics report: Provides a list of the number of units processed, containers processed, and operations performed by activity for a specified range of dates.
- Inventory Aging report: Provides a count of the units held in inventory for increasing periods of time. Time periods range from 0-30 days up to 120+ days for a specified range of items.
- Inventory by Item report: Provides a count of containers, inner packs, and units for each location where a specified item can be found.
- Inventory by Location report: Provides a count of containers, units, available units, distributed units, and inner packs by item for a specified range of locations.
- Paper Pick Directives report: Provides pick directives for unit picks.
- Pending Putaway report: Provides a list of all received merchandise to be put away.
- Return to Vendor report: Provides a list of RTV IDs and container IDs for a specified vendor and authorization number.
- Return to Vendor Advice report: Provides a vendor's return address and item information for a specified RTV.
- Space Utilization report: Provides a list of underutilized storage locations, including their maximum capacity by cube or standard unit.

# Maintain Inventory by Container

**Navigate:** From the main menu, select Inventory Management > Inventory Inquiry/Edit by Container. The Inventory Inquiry/Edit by Container window opens.

> **Note**: The user with insufficient privileges cannot edit the inventory on the Inventory Management > Inventory Inquiry/Edit by Container window. An error message “Insufficient Privileges to perform the operation” is displayed if the user privilege level is less then the current value of the parameter: “mm_sec_level_gu”.




**Inventory Inquiry/Edit by Container Window**

> **Note:** You can also access this window from the following windows: Inventory Inquiry by Item, Inventory Inquiry by Location, Inventory Inquiry by Order, Inventory Inquiry by Vendor, WIP Audit Outbound, and Stock Order Inquiry Screen.

## Display Inventory by Container

1. If inventory for a container is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Container ID query field, enter the container ID, or click the LOV  button and select the container.
4. Click the execute  query button. The inventory for the selected container is displayed.

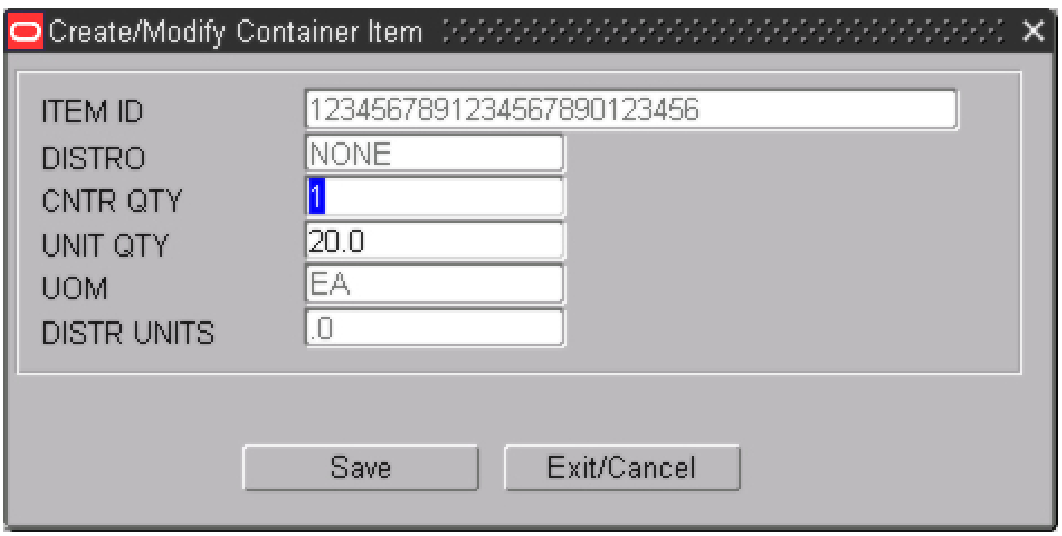
> **Note:** There are three blocks in this window. From top to bottom, they are referred to as the Query block, Container block, and Item block.

## Edit a Container

1. On the Inventory Inquiry/Edit by Container window, click **Next** to place the cursor in the Container block.
2. Double-click any field in the Container block. The Create/Modify Container window opens.
3. Edit the enabled fields as necessary.
4. Click **Save** to save any changes and close the Create/Modify Container window.

## Edit an Item in a Container

1. On the Inventory Inquiry/Edit by Container window, click **Next** to place the cursor in the Item block.
2. Double-click any field in the Item block. The Create/Modify Container Item window opens.




**Create/Modify Container Item Window**

3. Edit the container quantity and unit quantity as necessary.
4. Click **Save** to save the changes.
5. When prompted to select a reason for the adjustment, select the reason and click **OK**.

## Split an Item Between Containers

1. On the Inventory Inquiry/Edit by Container window, click **Next** to place the cursor in the Item block.
2. Select the item that you want to split.
3. Click **Split**. The Split Container window opens.
4. In the Container field, enter the ID of a new or existing container.
5. In the Unit Qty field, enter the number of items to be placed in the container.
6. Click **Save** to save the changes and clear the fields.
7. Add any additional splits as necessary.

8. When done, click **Exit/Cancel** to close the Split Container window.

## Add a Container

1. On the Inventory Inquiry/Edit by Container window, click **Next** to place the cursor in the Container block.

> **Note:** The cursor may also be in the Query block.

2. Click **Create Record**. The Create/Modify Container window opens.
3. In the Master CID field, enter the ID of the master, or parent, container if applicable.
4. In the Type field, enter the type of container, or click the LOV  button and select the type.
5. If there is no master container, enter the location ID for the container in the Location ID field.
6. Edit the default dimensions as necessary.
7. In the Container Weight field, enter the weight of the empty container.
8. If the container holds a perishable item, enter the best before date in the Best Before Date field.
9. Click **Save** to save the changes and close the Create/Modify Container window.

## Add an Item to a Container

1. On the Inventory Inquiry/Edit by Container window, click **Next** to place the cursor in the Item block.
2. Click **Create Record**. The Create/Modify Container Item window opens.
3. In the Item ID field, enter the item ID of the item in the container.
4. In the Cntr Qty field, enter the number of child containers.
5. In the Unit Qty field, enter the number of units.
6. Click **Save** to save the changes.
7. When prompted to select a reason for the adjustment, select the reason and click **OK**.

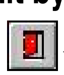
## Delete a Container

1. On the Inventory Inquiry/Edit by Container window, click **Next** to place the cursor in the Container block.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.
4. When prompted to select a reason for the adjustment, select the reason and click **OK**.

## Delete an Item from a Container

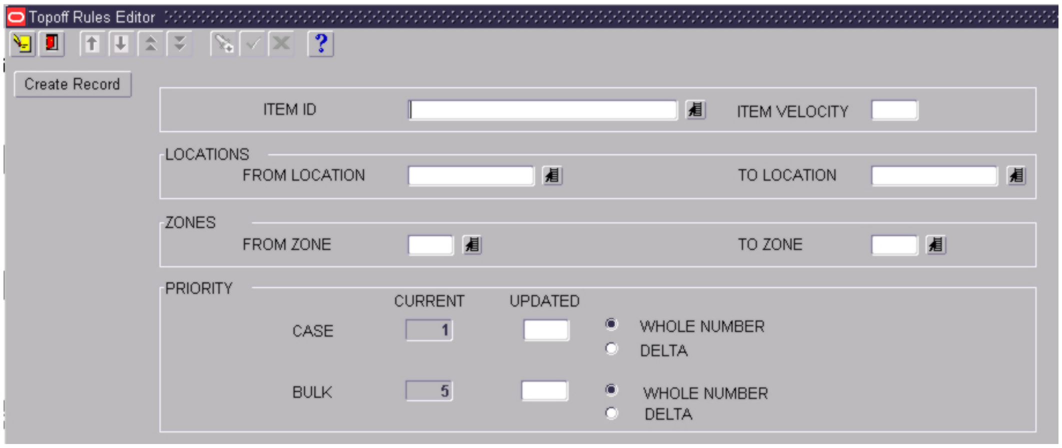
1. On the Inventory Inquiry/Edit by Container window, click **Next** to place the cursor in the Item block.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Exit the Inventory Inquiry/Edit by Container Window

- Click the exit  button to close the window.

# Request FPL Top-Off Replenishment

**Navigate:** From the main menu, select Inventory Management > Topoff Rules Editor. The Topoff Rules Editor window opens.




**Topoff Rules Editor Window**

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**Note:** You can also access this window from Support Functions > Processing/Returns Setup > Topoff Rules Editor.

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## Create a Request

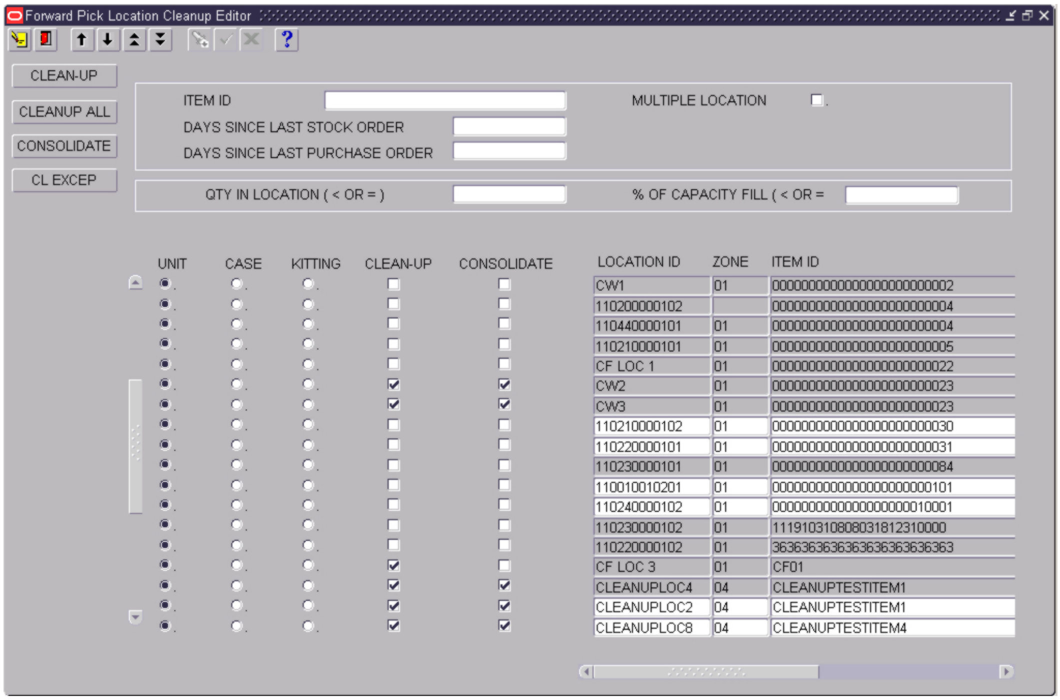
1. On the Topoff Rules Editor window, enter criteria in the necessary fields. You can restrict the request by the following criteria:
   - Item: In the Item ID field, enter the ID of the item, or click the LOV button and select the item.
   - Velocity: In the Item Velocity field, enter the desired velocity.
   - Location range: In the From Location and To Location fields, enter the location IDs, or click the LOV buttons and select the locations.
   - Zone range: In the From Zone and To Zone fields, enter the zone IDs, or click the LOV buttons and select the zones.
   - Priority: Select either the Whole Number or the Delta option for either cases or bulk. If you select Whole Number, enter the new priority number in the appropriate Updated field. If you select Delta, enter the number to be subtracted from the Current priority.
2. Click **Create Record**. The request is submitted for processing.

## Exit the Topoff Rules Editor Window

- Click the exit button to close the window.

# Request FPL Cleanup or Consolidation

**Navigate:** From the main menu, select Inventory Management > Clean up Rules Editor. The Forward Pick Location Cleanup Editor window opens.




**Forward Pick Location Cleanup Editor Window**

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**Note:** You can also access this window from Support Functions > Processing/Returns Setup > Clean up Rules Editor.

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## Display all Forward Pick Locations

- Click the execute query  button.

## Display a Subset of Forward Pick Locations

1. If forward pick locations are currently displayed, click the clear  button.
2. Click the enter query  button.
3. Use one or more of the following query criteria:
   - Item: Find all forward pick locations for a specified item.
   - Multiple Location: Find all forward pick locations where its item resides in one or more additional forward pick locations.
   - Days Since Last Stock Order/Purchase Order: Find all forward pick locations that have not had stock orders or purchase orders raised against them in a specified number of days.
   - Qty in Location: Find all forward pick locations with less than or equal to the specified quantity.

- % of Capacity of Fill: Find all locations with less than or equal to the specified percentage of capacity filled.

4. Click the execute  query button. The forward pick locations that match the criteria appear.

> **Note:** Records that appear grayed out are not eligible for cleanup or consolidation. A record appears grayed out if (1) either a request for cleanup or consolidation already exists or (2) inbound or outbound quantities are expected at the locations.

## Request Cleanup for One Location

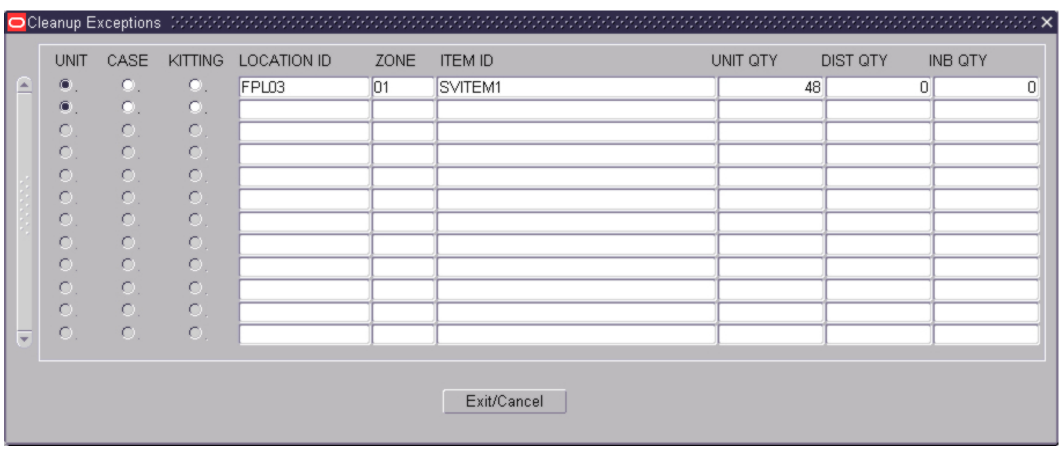
1. On the Forward Pick Location Cleanup Editor window, select a location that is eligible for cleanup.

> **Note:** The Clean-up check box must be selected and the record can not be grayed out.

2. Click **Clean-up**. The record becomes grayed out which indicates that a cleanup request now exists for the location.

## Request Cleanup for Multiple Locations

1. On the Forward Pick Location Cleanup Editor window, click **Cleanup All**.
2. When prompted to confirm the cleanup request, click **Yes**.
3. If prompted about exceptions to the cleanup request, click **Yes**.
4. Click **CL Excep**. The locations that do not meet the conditions for cleanup appear in the Cleanup Exceptions window.




**Cleanup Exceptions Window**

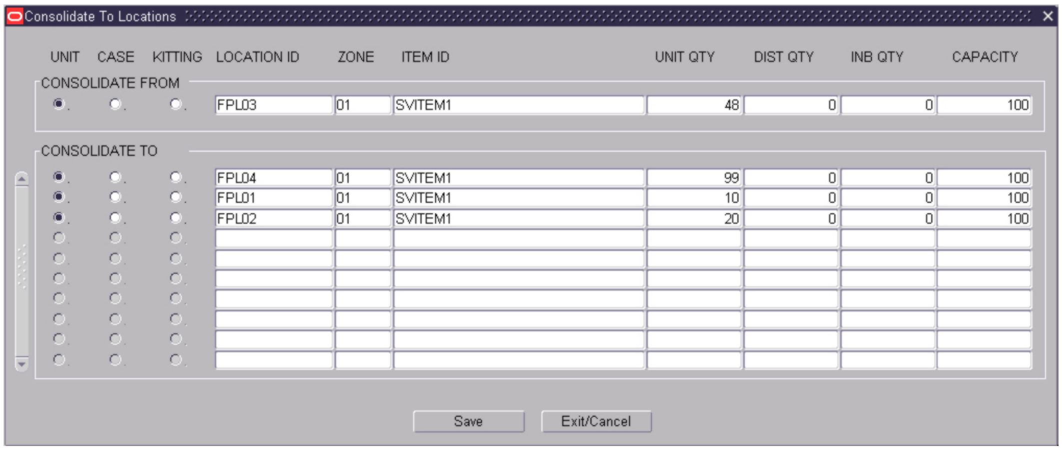
5. Click **Exit/Cancel** to close the Cleanup Exceptions window.

## Request Consolidation

1. On the Forward Pick Location Cleanup Editor window, select a location that is eligible for consolidation.

> **Note:** The Consolidate check box must be selected and the record can not be grayed out.

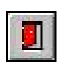
2. Click **Consolidate**. The locations that are eligible for consolidation with the selected location appear in the Consolidate to Locations window.




**Consolidate to Locations Window**

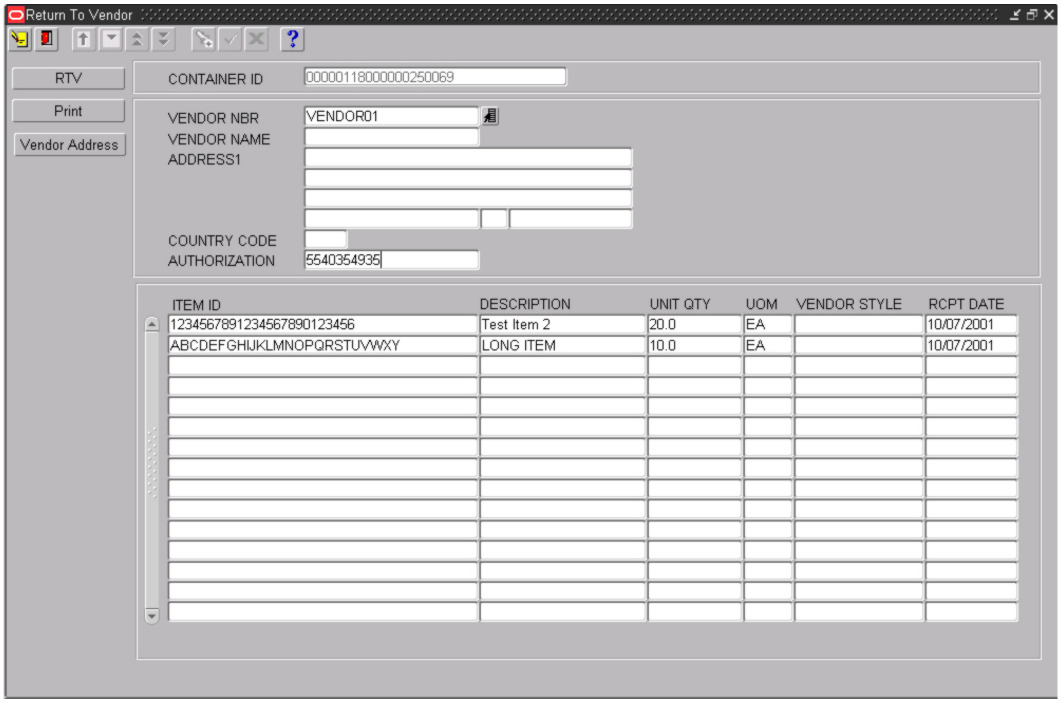
3. Select the location that you want to consolidate to and click **Save**.
4. When prompted to confirm the consolidation request, click **Yes**.

## Exit the Forward Pick Location Cleanup Editor Window

- Click the exit  button to close the window.

# Process Returns to Vendor

**Navigate:** From the main menu, select Inventory Management > Return to Vendor. The Return to Vendor window opens.




**Return to Vendor Window**

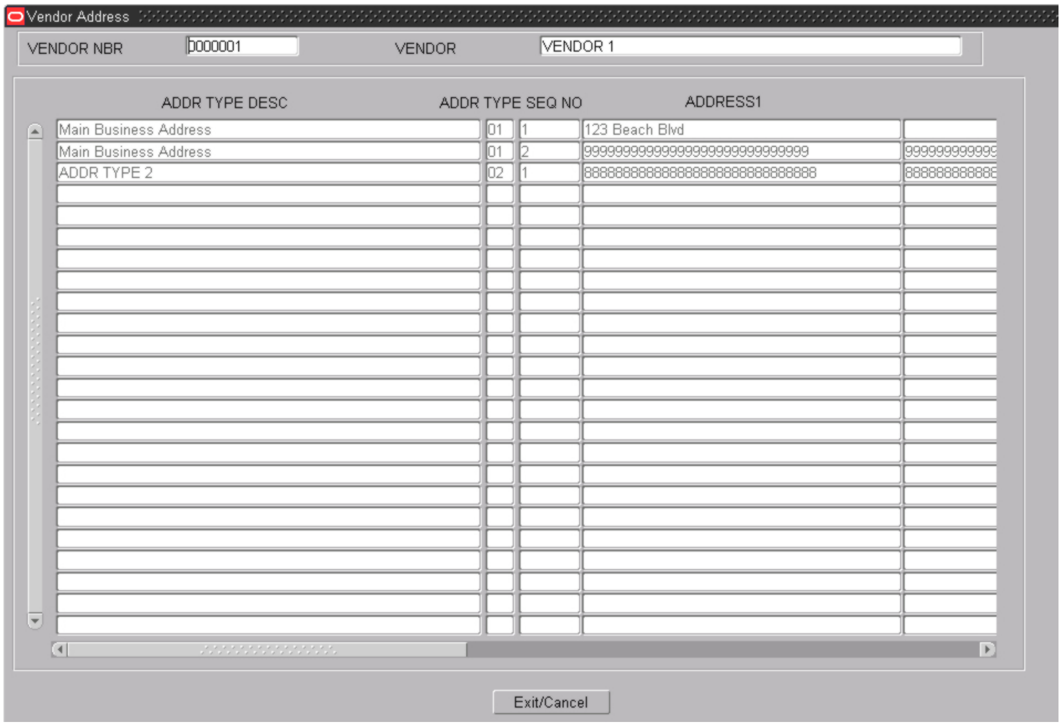
**Note:** You can also access this window from the Inventory Inquiry by Vendor window.

## Display a Return to Vendor

1. Click the enter query  button.
2. In the Container ID query field, enter the ID of the container, or click the LOV  button and select the container.
3. Click the execute query  button. The details of the return to vendor appear.

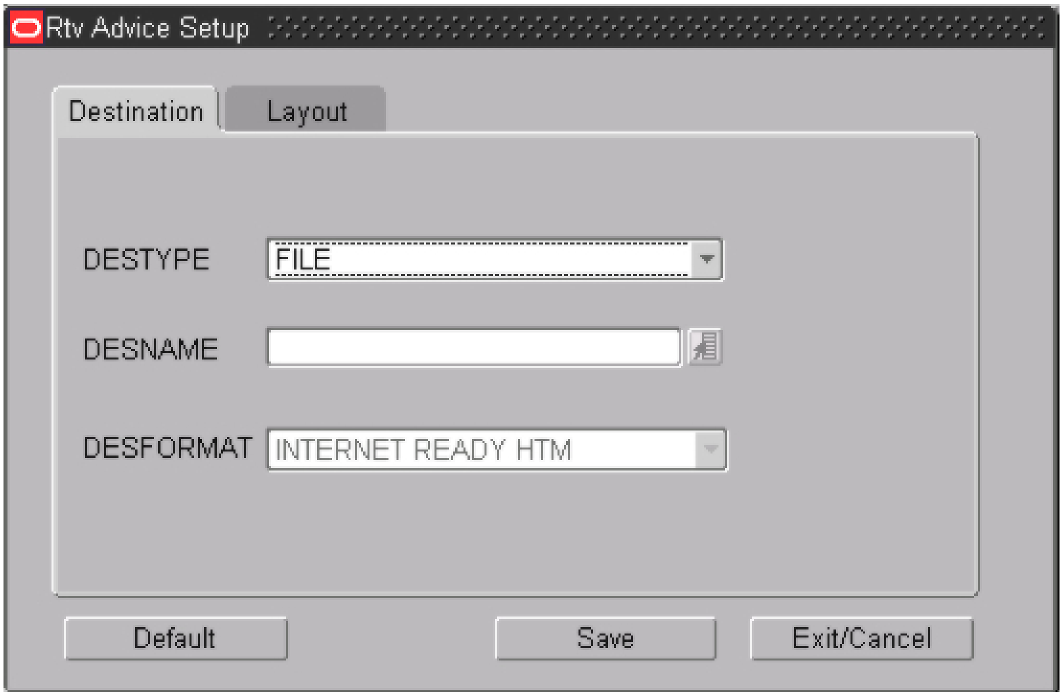
## Process a Return to Vendor

1. On the Return to Vendor window, enter the vendor number in the Vendor Nbr field.
2. To enter an address for the vendor:
   a. Click **Vendor Address**. The Vendor Address window opens.




**Vendor Address Window**

   b. Enter the ship-to address of the vendor or click **Vendor Address** and select the address.
   c. Click **Save** to save any changes and close the Vendor Address window.
3. In the Authorization field, enter the authorization number from the vendor.
4. Click **RTV**.
5. When prompted to confirm the return to vendor, click **Yes**.
6. When prompted to select a reason for the inventory adjustment, select the reason and click **OK**. The RTV Advice Setup window opens.



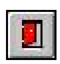

**RTV Advice Setup Window**

7. In the Destype field, select the type of destination.
8. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

9. To view the layout of the report, click on the Layout tab.
10. Click **Save**. The report is sent to the selected destination.

## Exit the Return to Vendor Window

- Click the exit  button to close the window.

# Confirm Paper Unit Picks

**Navigate:** From the main menu, select Inventory Management > Pick Confirmation > Confirm Paper Unit Pick. The Confirm Paper Pick window opens.


**Confirm Paper Pick Window**

## Display Unit Pick Directives

1. If any unit pick directives are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Wave Nbr query field, enter the wave number, or click the LOV  button and select the wave.
4. In the Group ID query field, enter the group ID, or click the LOV  button and select the group.
5. Click the execute query  button. The unit pick directives that match the search criteria appear.

## Confirm Unit Pick Directives

1. On the Confirm Paper Pick window, select the unit pick directive that you want to confirm.
2. Click **Confirm Record**. The pick quantity is updated to equal the requested quantity.

   **Note:** To confirm all unit pick directives that are currently displayed, click **Confirm All**.

3. Click **Save** to save the changes.

## Purge Unit Pick Directives

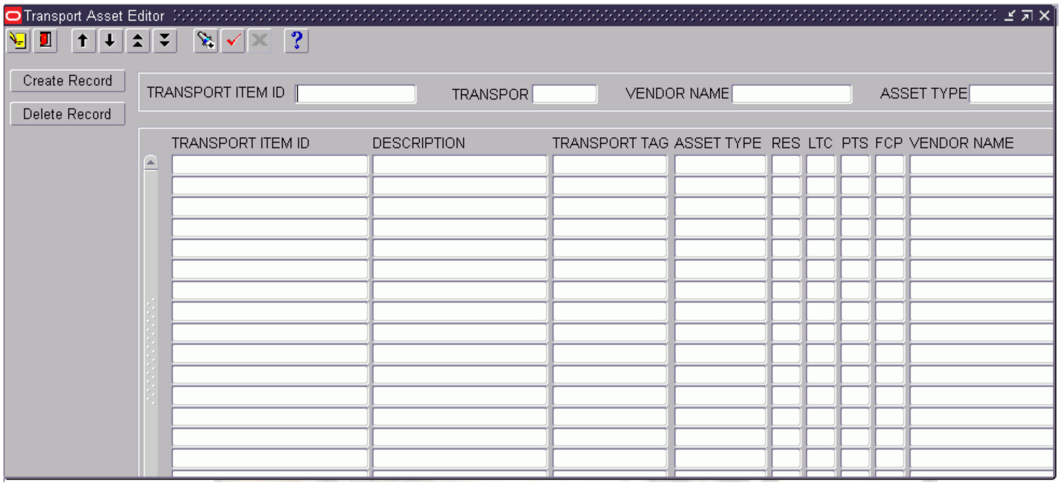
1. On the Confirm Paper Pick window, select the unit pick directive that you want to purge.
2. Click **Purge Pick Dir**.
3. When prompted to confirm the purge, click **Yes**.

## Exit the Confirm Paper Pick Window

- Click the exit  button to close the window.

# Create a Transport Asset

Navigate: From the main menu, select Support Functions > Item Setup > Transport Asset Editor. The Transport Asset Editor window opens.




**Transport Asset Editor Window**

## View an Item

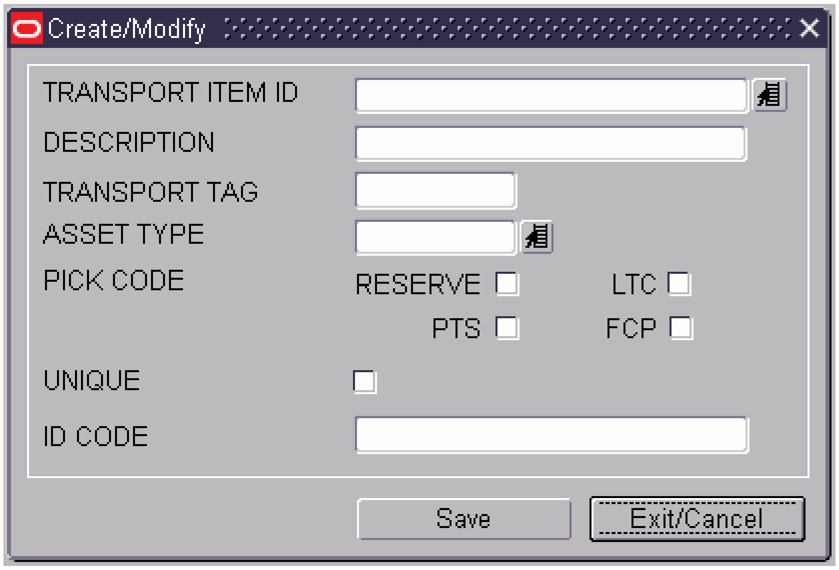
1. If an item is currently displayed, click the clear button.
2. Click the enter query button.
3. To search for an item by:
   - Transport Item ID: In the Transport Item ID field, enter the ID of the item, or click the LOV button and select the item.
   - Transport: In the Transport field, enter the Transport's ID, or click the LOV button and select the item.
   - Vendor Name: In the Vendor Name field, enter the name of the vendor, or click the LOV button and select the item.
   - Asset Type: in the Asset type field, enter the type in the field, or click the LOV button and select the item.
4. Click the execute query button. The details for the selected item appear.

## Create an Item

> **Note**: In order to set up an item as a transport asset, that item must be identified as a transport asset on the item_master table.

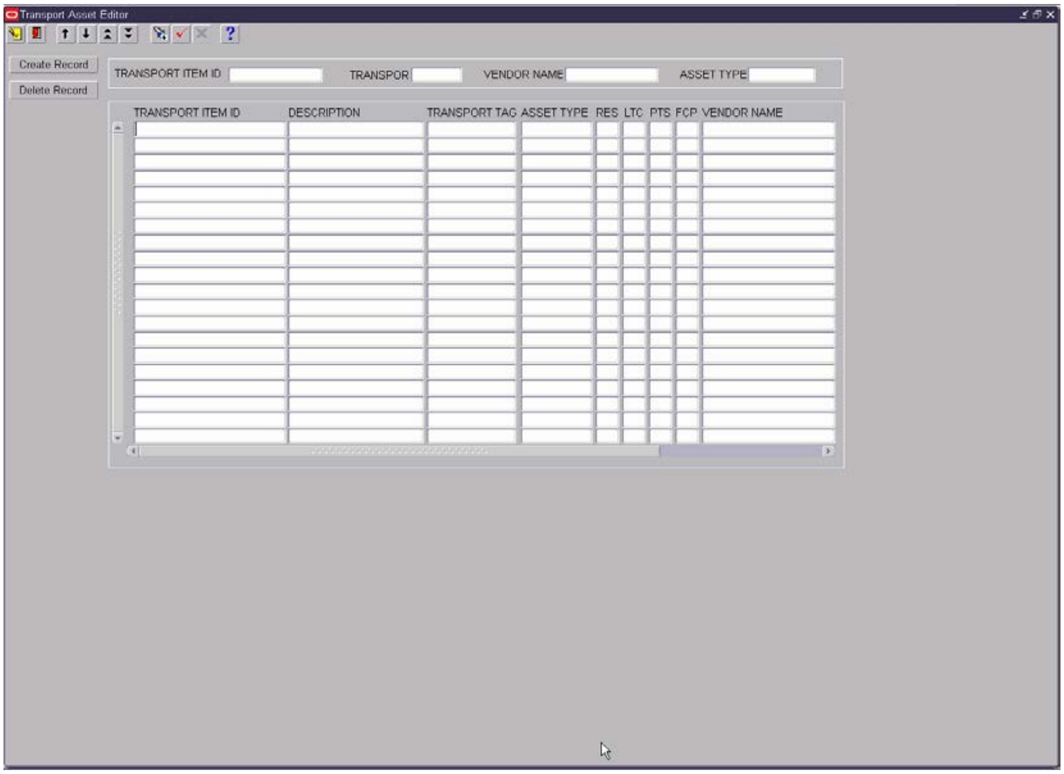
To create a Transport Asset Item:

1. Click Create Record. The Create/Modify window opens.




**Create/Modify Transport Asset Item Window**

2. Enter the Transport Item ID.
3. Enter the Description.
4. Enter the Transport Tag.
5. Enter the Asset Type.
6. Select a Pick Code.
7. Select if it is a unique item, if applicable.
8. Enter the ID Code.
9. Click Save.
10. Click Exit. The Transport Asset Editor window reappears.




**Transport Asset Editor Window**

## Delete an Item

To delete a Transport Asset window:

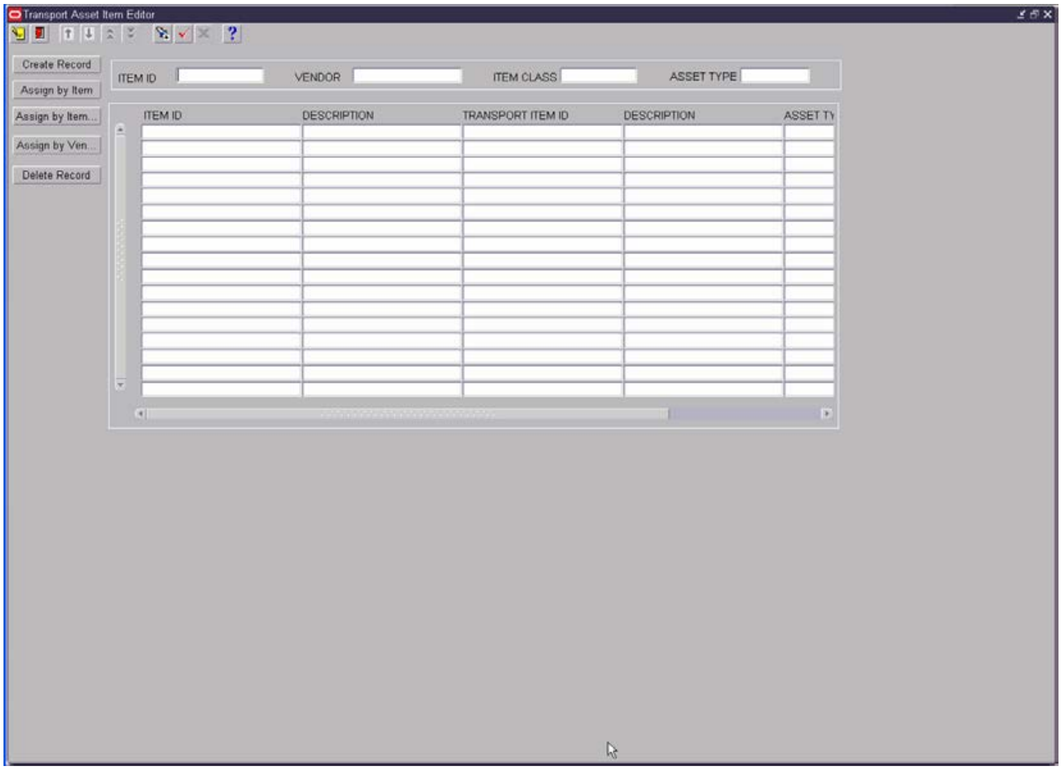
1. Select a transport asset item.
2. Click **Delete Record**.

## Exit the Transport Asset Editor window

- Click the exit button to close the window.

# Associate a Transport Asset to an Item

**Navigate**: From the main menu, select Support Functions > Item Setup > Transport Asset Item Editor. The Transport Asset Item Editor window opens.




**Transport Asset Item Editor Window**

## View an Item

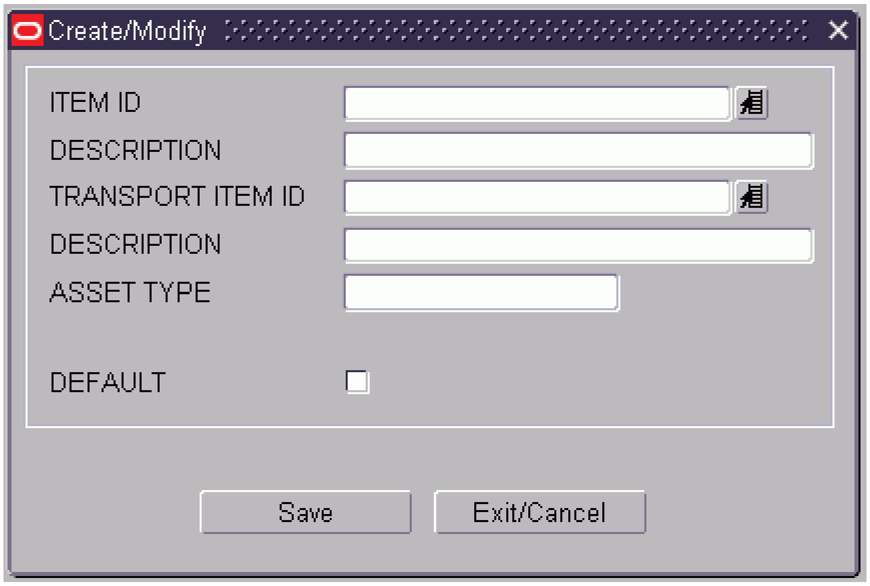
1. If an item is currently displayed, click the clear button.
2. Click the enter query button.
3. To search for an item by:
   - Transport Item ID: In the Transport Item ID field, enter the ID of the item, or click the LOV button and select the item.
   - Transport: In the Transport field, enter the Transport's ID, or click the LOV button and select the item.
   - Vendor Name: In the Vendor Name field, enter the name of the vendor, or click the LOV button and select the item.
   - Asset Type: in the Asset type field, enter the type in the field, or click the LOV button and select the item.
4. Click the execute query button. The details for the selected item appear.

## Create a Transport Asset to Item Association

**Note**: Before associating a transport asset to an item, that transport asset must be set up properly (see 'Create a Transport Asset' section.

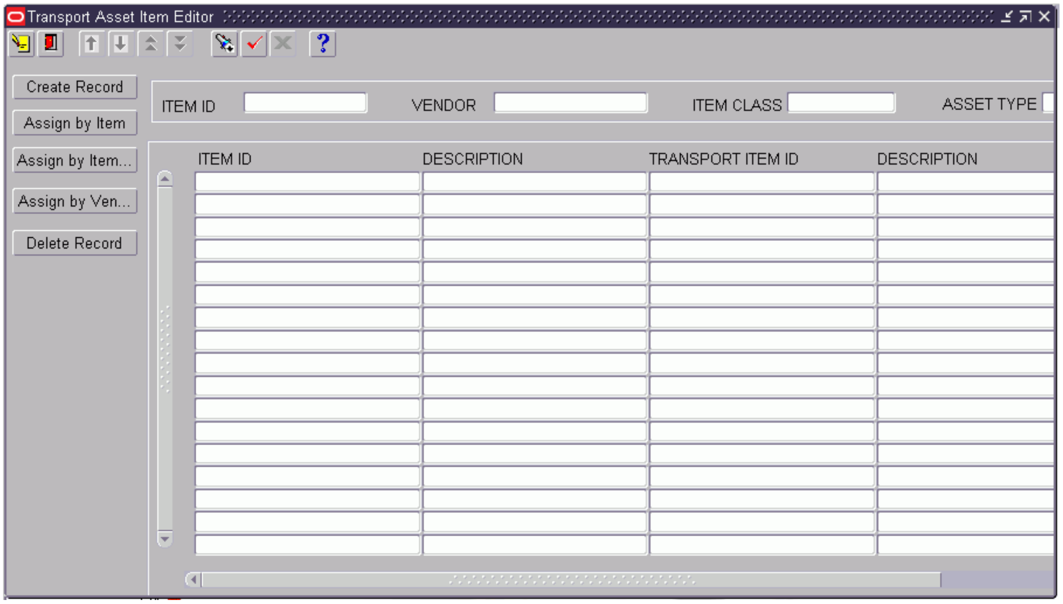
To create a transport asset item:

1. Click **Create Record**. The Create/Modify window opens.




**Create/Modify Transport Asset Item Editor Window**

2. Enter the Item ID.
3. Enter the Description.
4. Enter the Transport Item ID.
5. Enter the Description.
6. Enter the Asset Type.
7. Select if it is a default item, if applicable.
8. Click Save.
9. Click Exit. The Transport Asset Item Editor window reappears.

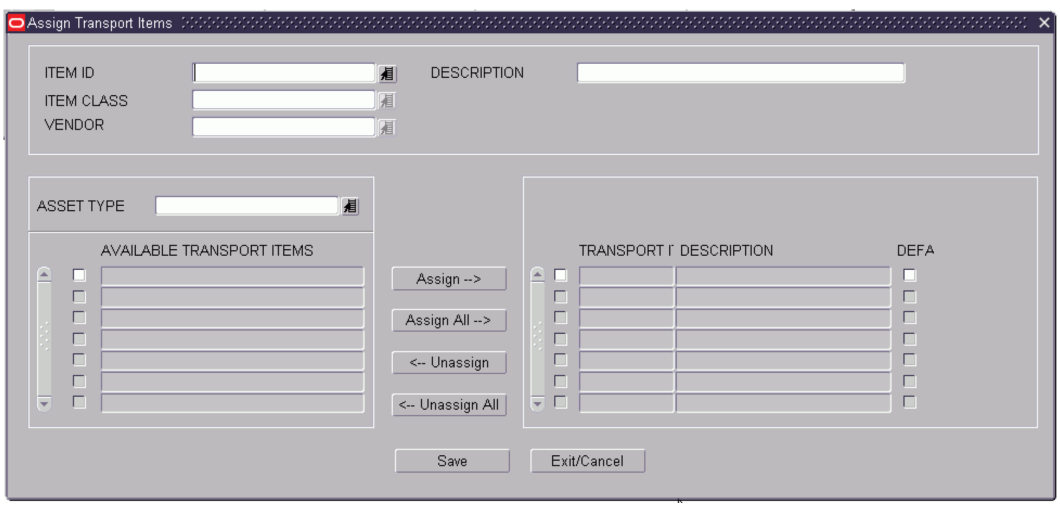



**Transport Asset Item Editor window**

## Assign by Item/Item Class/Vendor

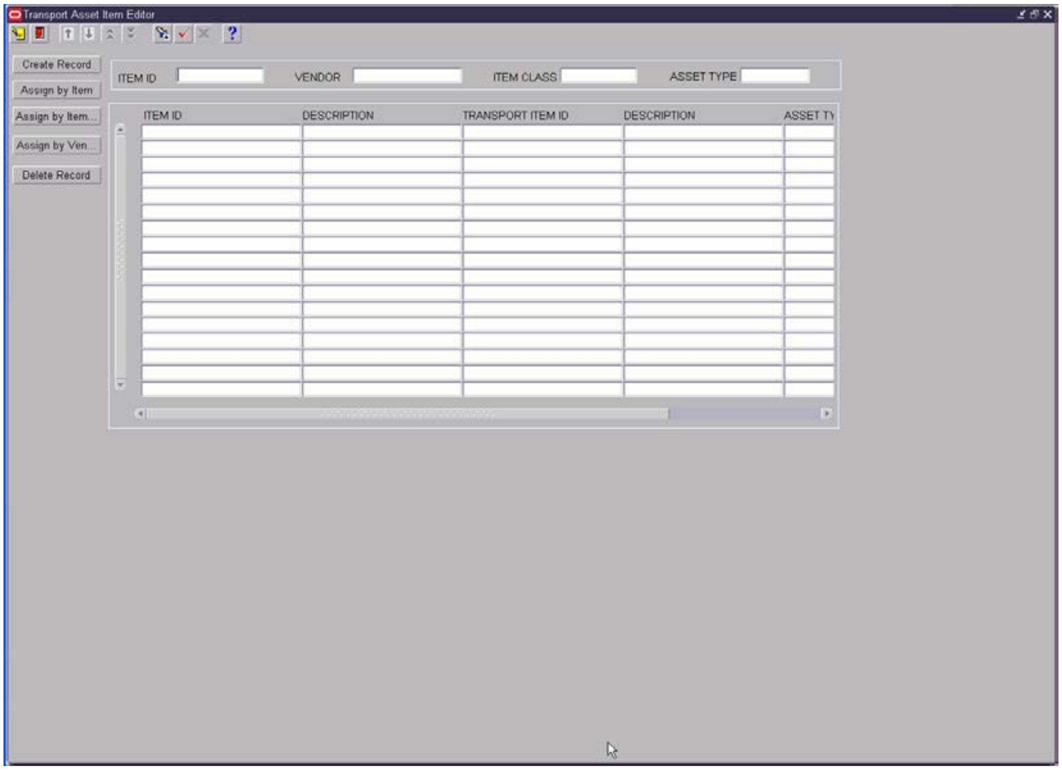
To assign by item:

1. Click Assign by Item or Assign by Item Class or Assign by Vendor. The Assign Transport Items window opens.




**Assign Transport Items Window**

2. Enter the Item ID, if applicable.
3. Enter the Description, if applicable.
4. Enter the Item Class, if applicable.
5. Enter the Vendor, if applicable.
6. Enter the Asset Type, if applicable.
7. Select the available transport items to assign and click Assign.
8. Click Save.
9. Click Exit. The Transport Asset Item Editor window reappears.




**Transport Asset Item Editor Window**

## Delete an Item

To delete a transport asset item:

1. Select a transport asset item.
2. Click **Delete Record**.

## Exit the Transport Asset Editor window

- Click the exit button to close the window.

## Door Load Type Editor

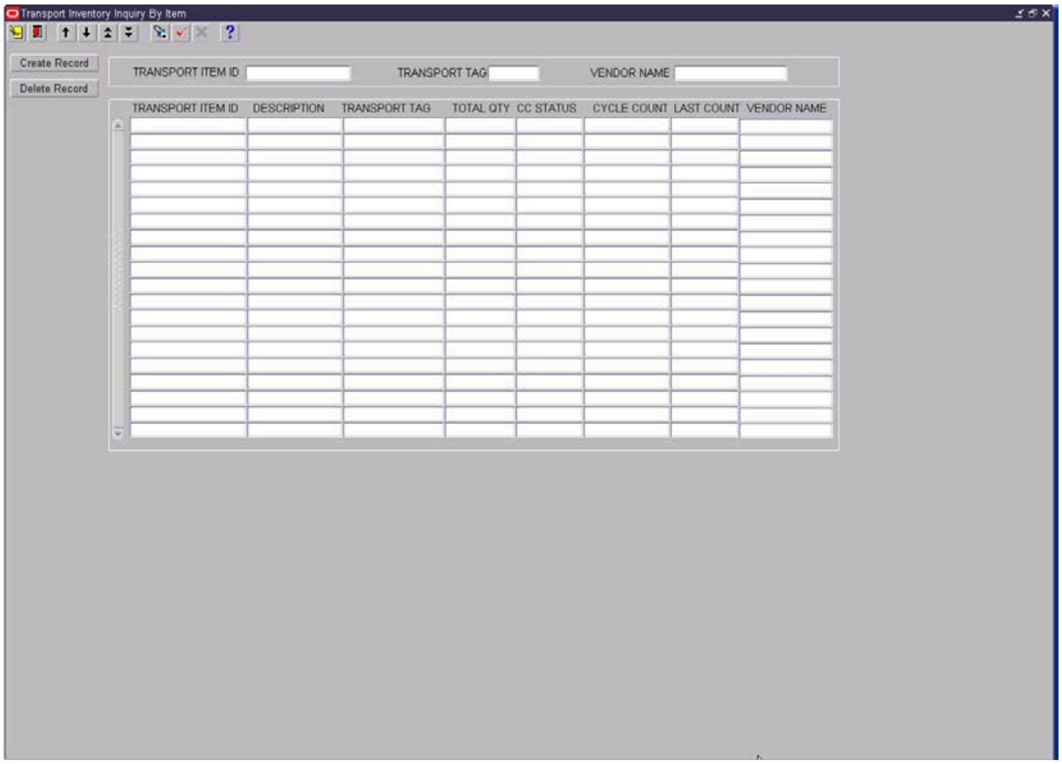
This window allows the user to set load types per door.

## Door Zone Editor

This screen allows the user to create or delete a door zone record.

# Maintain Transport Inventory Inquiry by Item

Navigate: From the main menu, select Inventory Management > Transport Inventory Inquiry Item. The Transport Inventory Inquiry By Item window opens.




**Transport Inventory Inquiry By Item Window**

## View an Item

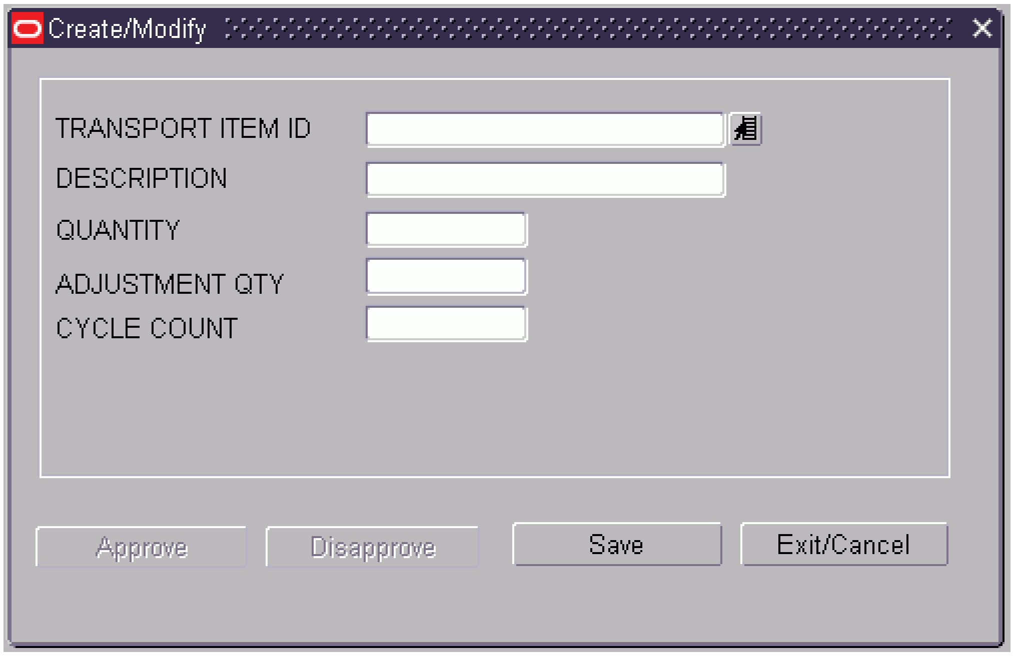
1. If an item is currently displayed, click the clear button.
2. Click the enter query button.
3. To search for an item by:
   - Transport Item ID: In the Transport Item ID field, enter the ID of the item, or click the LOV button and select the item.
   - Transport: In the Transport field, enter the Transport’s ID, or click the LOV button and select the item.
   - Vendor Name: In the Vendor Name field, enter the name of the vendor, or click the LOV button and select the item.
   - Asset Type: in the Asset type field, enter the type in the field, or click the LOV button and select the item.
4. Click the execute query button. The details of the selected item appear.

## Create an Item

**Note**: Asset item must be set up on the Transport Asset Editor prior to creating inventory.

To create a transport asset item:

1. Click Create Record. The Create/Modify window opens.

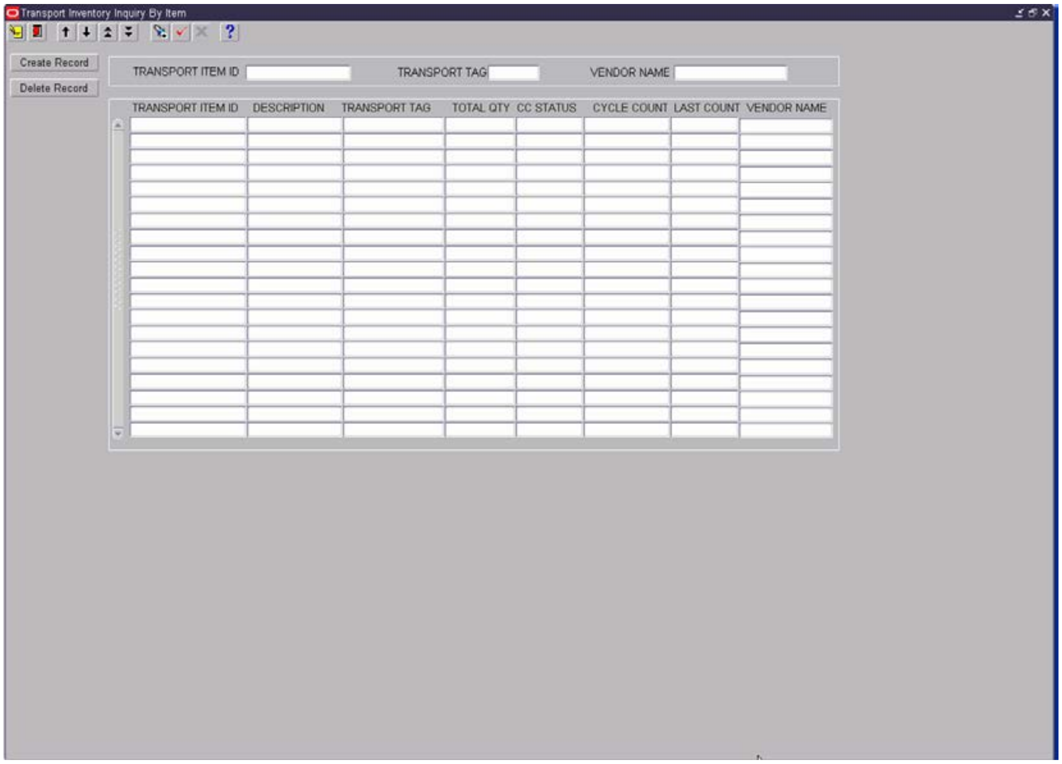



**Create/Modify Transport Inventory Inquiry by Item Window**

2. Enter the Transportation Item ID.
3. Enter the description.

> **Note**: This will be populated once the transport item id is entered.

4. Enter the Quantity.
5. Enter the Adjustment Quantity.
6. Enter the Cycle Count.
7. Click Save.
8. Click Exit. The Transport Inventory Inquiry by Item window reappears.

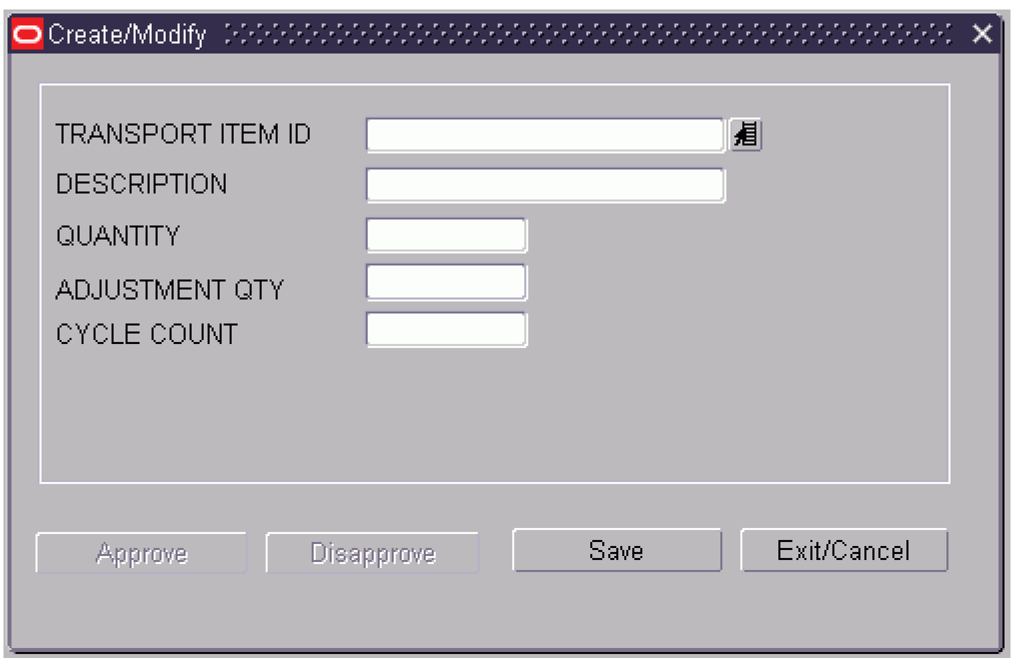



**Transport Inventory Inquiry by Item window**

## Modify an Item

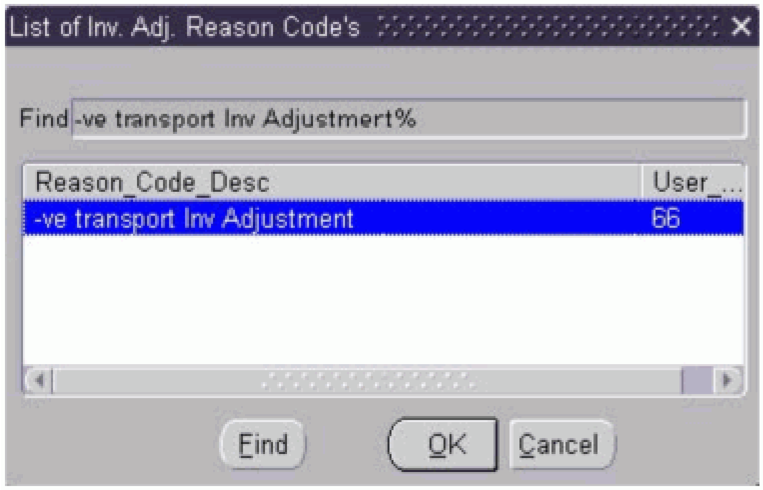
To modify a transport asset item:

1. Search for an item and double-click it to open the Modify window. The Create/Modify window opens.



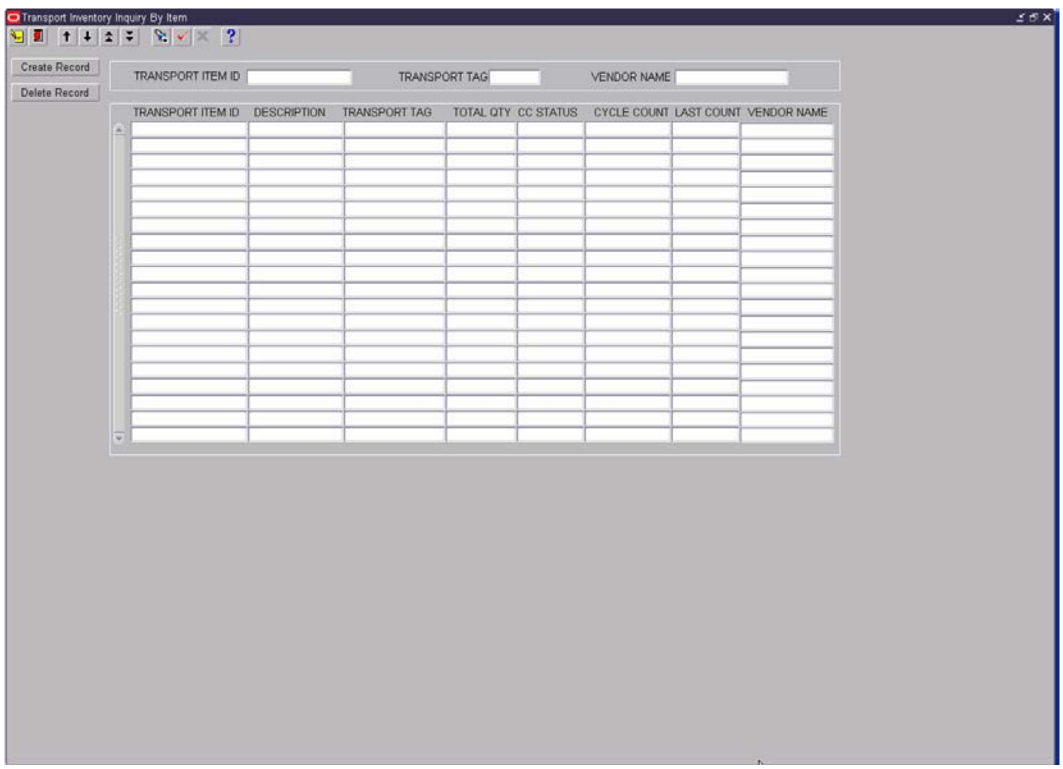

**Create/Modify Transport Inventory Inquiry by Item window**

2. Enter the Cycle Count number.
3. Click Approve. The List of Inv. Adj. Reason Codes window opens.




**List of Inv. Adj. Reason Codes window**

4. Select a reason.
5. Click OK. The Transport Inventory Inquiry by Item window reappears.




**Transport Inventory Inquiry by Item window**

## Delete an Item

To delete a transport asset item:

1. Select a transport asset item.

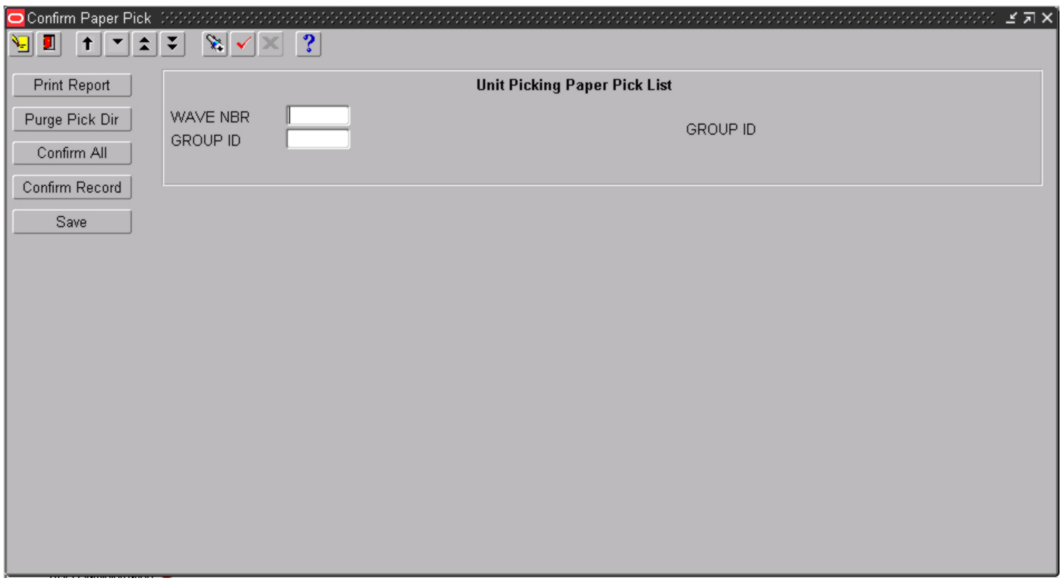
2. Click Delete Record.

### Exit the Transport Inventory Inquiry by Item window

- Click the Exit button.

## Generate the Paper Pick Directives Report

**Navigate:** From the main menu, select Inventory Management > Pick Confirmation > Confirm Paper Unit Pick. The Confirm Paper Pick window opens.




**Confirm Paper Pick Window**

### Display Unit Pick Directives

1. If any unit pick directives are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Wave Nbr query field, enter the wave number, or click the LOV  button and select the wave.
4. In the Group ID query field, enter the group ID, or click the LOV  button and select the group.
5. Click the execute query  button. The unit pick directives that match the search criteria appear.

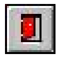
### Generate the Paper Pick Directives Report

1. On the Confirm Paper Pick window, click **Print Report**. The Unit Pick Group Setup window opens.
2. In the Destype field, select the type of destination.
3. In the Desname field, select the name of the destination.

**Note:** To return to the default settings, click **Default**.

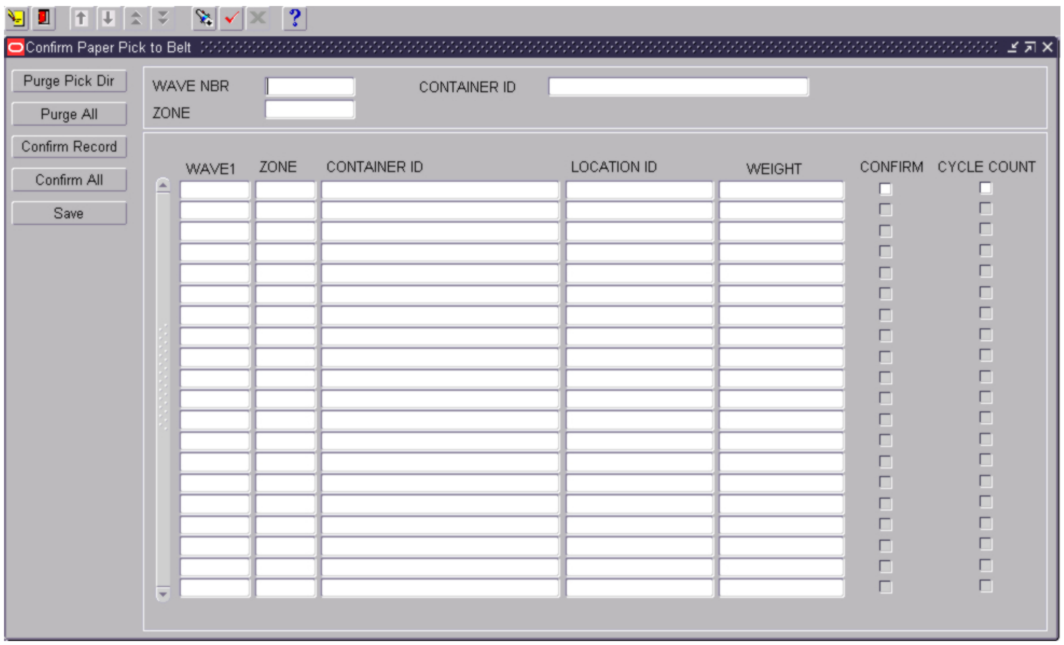
4. To view the layout of the report, click on the Layout tab.
5. Click **Save**. The report is sent to the selected destination.

## Exit the Confirm Paper Pick Window

- Click the exit  button to close the window.

# Confirm Paper Pick to Belt

**Navigate:** From the main menu, select Inventory Management > Pick Confirmation > Confirm Paper Pick to Belt. The Confirm Paper Pick to Belt window opens.




**Confirm Paper Pick to Belt Window**

## Display all Container Pick Directives

- Click the execute query  button.

## Display a Subset of Container Pick Directives

1. If any container pick directives are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Wave Nbr query field, enter the wave number, or click the LOV button and select the wave.
4. In the Zone query field, enter the ID of the zone, or click the LOV button and select the zone.
5. In the Container query field, enter the ID of the container, or click the LOV button and select the container.
6. Click the execute query button. The container pick directives that match the search criteria appear.

## Confirm Container Pick Directives

1. On the Confirm Paper Pick to Belt window, select the Confirm check box next to each container pick directive that you want to confirm.
2. Click **Confirm Record**. The selected container pick directives are confirmed.

   **Note:** To confirm all the container pick directives that are currently displayed, click **Confirm All**.

3. Click **Save** to save the changes.

## Purge Container Pick Directives

1. On the Confirm Paper Pick to Belt window, select the Confirm check box next to each container pick directive that you want to purge.
2. Click **Purge Pick Dir**. The selected container pick directives are purged.

   **Note:** To purge all the container pick directives that are currently displayed, click **Purge All**.

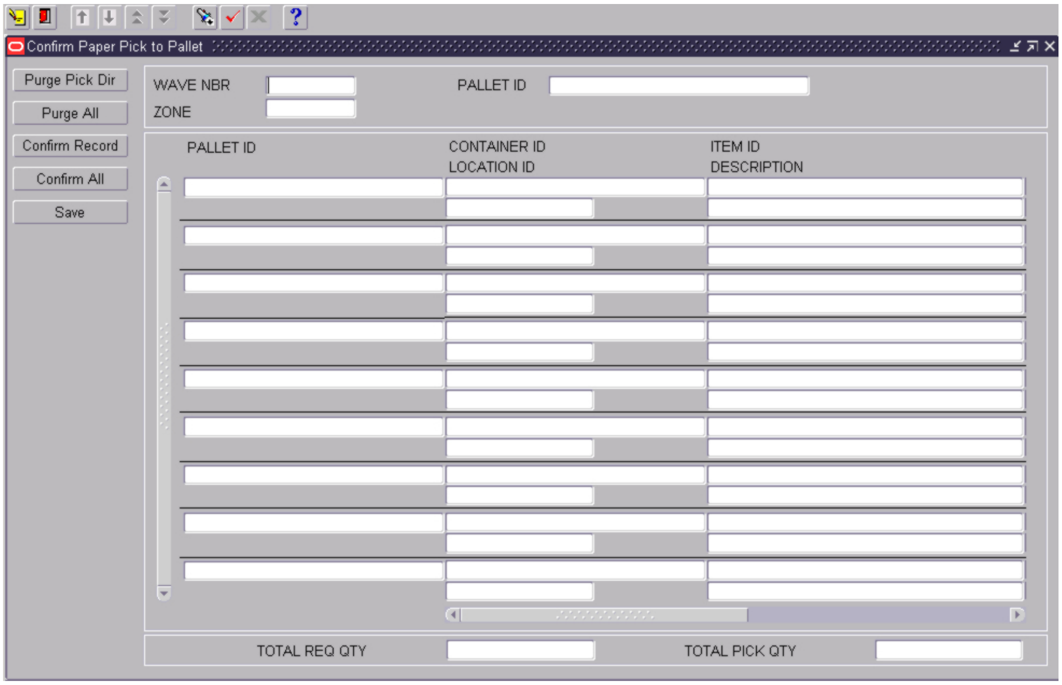
3. When prompted to confirm the purge, click **Yes**.

## Exit the Confirm Paper Pick to Belt Window

- Click the exit button to close the window.

# Confirm Paper Pick to Pallet

**Navigate:** From the main menu, select Inventory Management > Pick Confirmation > Confirm Paper Pick to Pallet. The Confirm Paper Pick to Pallet window opens.




**Confirm Paper Pick to Pallet Window**

## Display all Pallet Pick Directives

- Click the execute query button.

## Display a Subset of Pallet Pick Directives

1. If any pallet pick directives are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Wave Nbr query field, enter the wave number, or click the LOV button and select the wave.
4. In the Zone query field, enter the ID of the zone, or click the LOV button and select the zone.
5. In the Pallet ID query field, enter the ID of the pallet, or click the LOV button and select the pallet.
6. Click the execute query button. The pallet pick directives that match the search criteria appear.

## Confirm Pallet Pick Directives

1. On the Confirm Paper Pick to Pallet window, select the pallet pick directive that you want to confirm.
2. Click **Confirm Record**. The pick quantity is updated to equal the requested quantity.

> **Note:** To confirm all the pallet pick directives that are currently displayed, click **Confirm All**.

3. Click **Save** to save the changes.

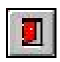
### Purge Pallet Pick Directives

1. On the Confirm Paper Pick to Pallet window, select the pallet pick directive that you want to purge.
2. Click **Purge Pick Dir**. The selected pallet pick directive is purged.

> **Note:** To purge all the pallet pick directives that are currently displayed, click **Purge All**.

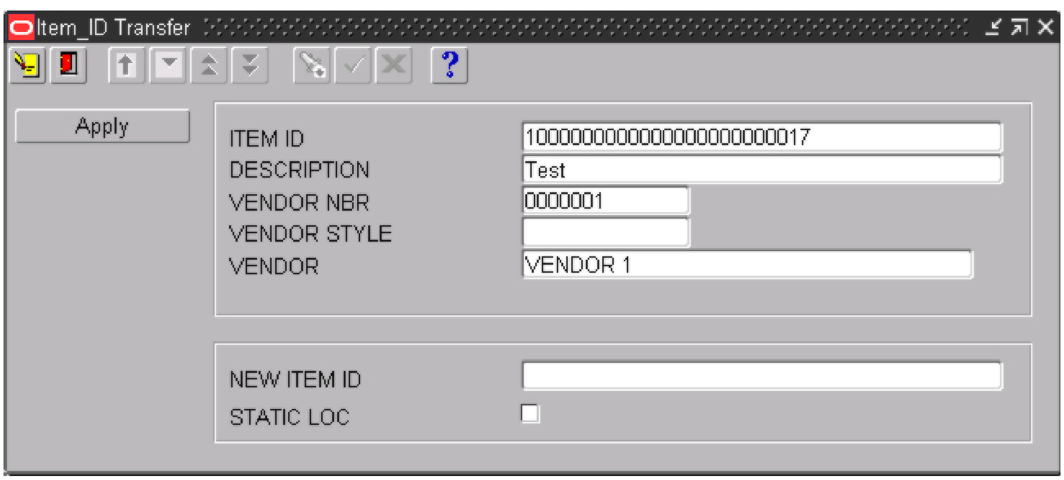
3. When prompted to confirm the purge, click **Yes**.

### Exit the Confirm Paper Pick to Pallet Window

- Click the exit  button to close the window.

## Transfer Item IDs

**Navigate:** From the main menu, select Inventory Management > Item ID Transfer. The Item ID Transfer window opens.




**Item ID Transfer Window**

## Transfer an Item ID

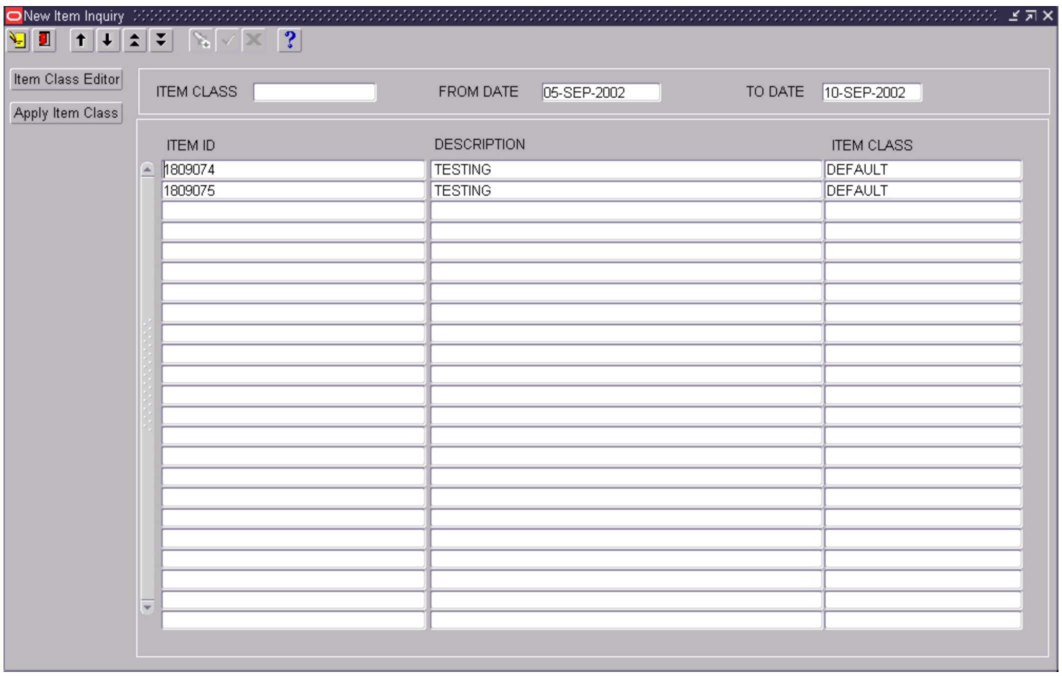
1. In the Item ID field, enter the ID of the item whose ID must be changed.
2. Click the execute query button. Additional information about the item opens.
3. In the New Item ID field, enter the new item ID to be assigned to the item.
4. Click **Apply**.
5. When prompted to confirm the item ID transfer, click **Yes**.

## Exit the Item ID Transfer Window

- Click the exit button to close the window.

# View New Items

**Navigate:** From the main menu, select Inventory Management > New Item Inquiry. The New Item Inquiry window opens.




**New Item Inquiry Window**

## Display All New Items

- Click the execute query button.

## Display a Subset of New Items

1. If any new items are currently displayed, click the clear button.
2. Click the enter query button.
3. To display new items by item class, enter the ID of the item class in the Item Class query field, or click the LOV button and select the item class.
   To display new items by creation date, enter the range of dates in the From Date and To Date fields, or click the calendar buttons and select the dates.

   **Note:** To search for new items on a specific date, enter the same date in both date fields.

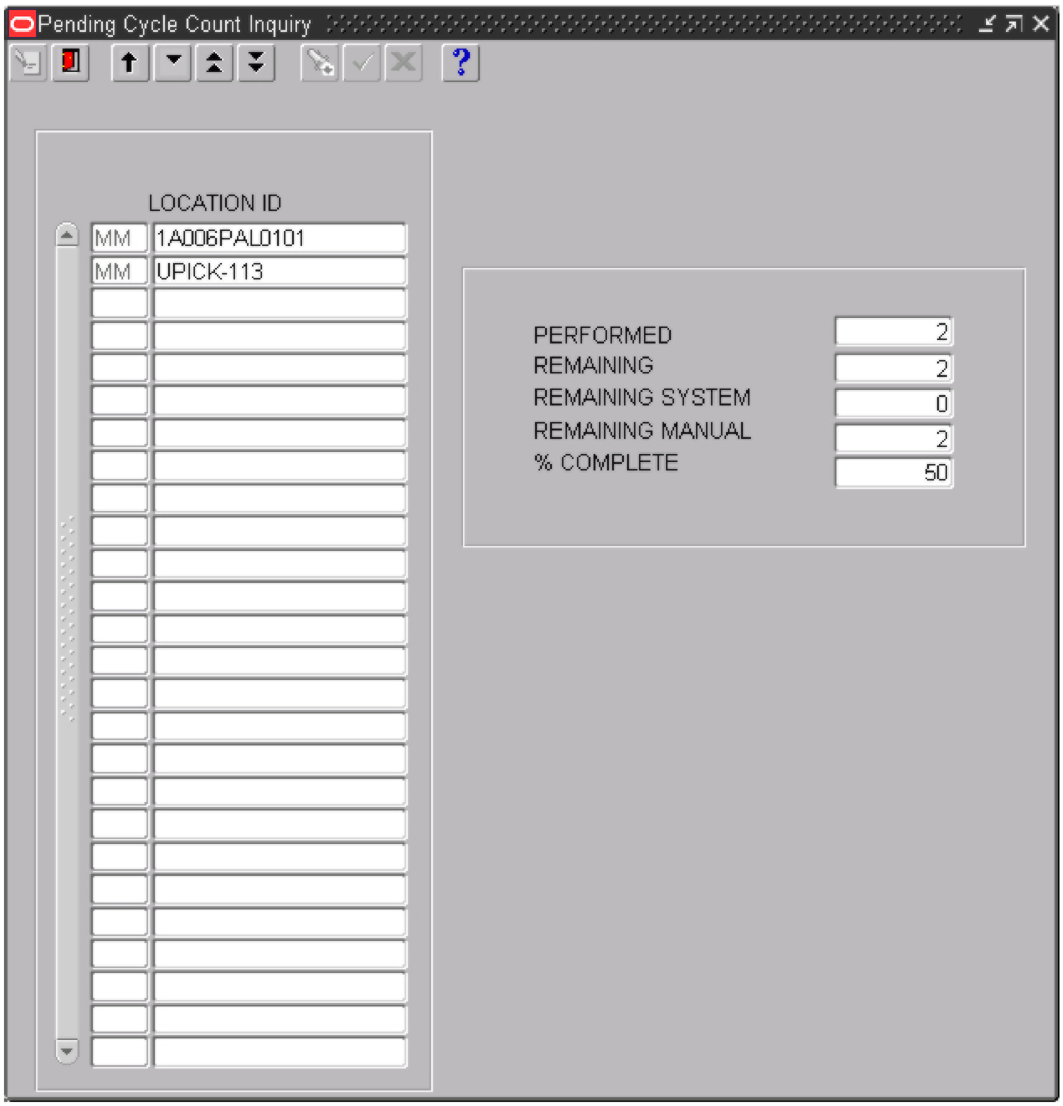
4. Click the execute query button. The new items that match the search criteria appear.

## Exit the New Item Query Window

- Click the exit button to close the window.

# View Pending Cycle Counts

**Navigate:** From the main menu, select Inventory Management > Pending Cycle Counts Inquiry. The pending cycle counts and summary details appear in the Pending Cycle Count Inquiry window.



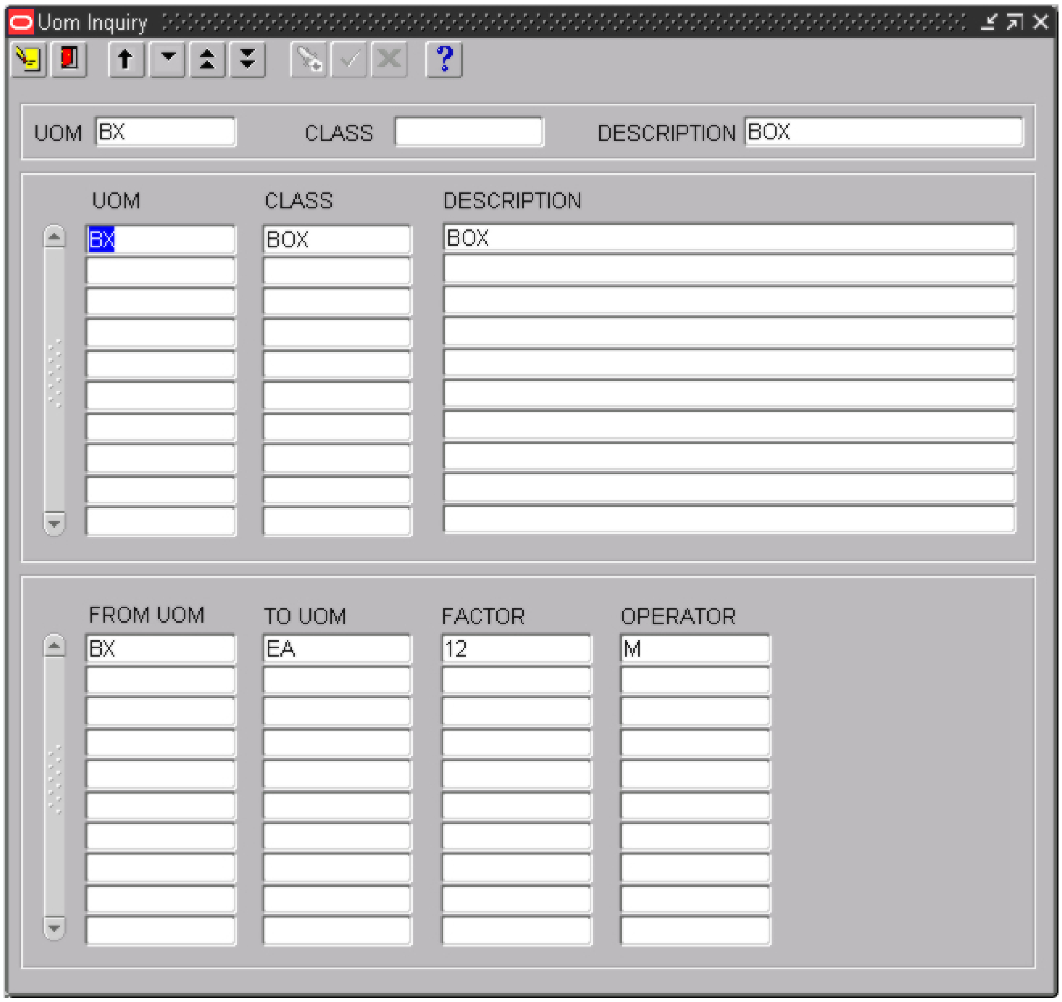

**Pending Cycle Count Inquiry Window**

## Exit the Pending Cycle Count Inquiry Window

- Click the exit  button to close the window.

# View Units of Measure

**Navigate:** From the main menu, select Support Functions > Item Setup > UOM Inquiry. The UOM Inquiry window opens.




**UOM Inquiry Window**

## Display All Units of Measure

- Click the execute query  button.

## Display a of Unit of Measure

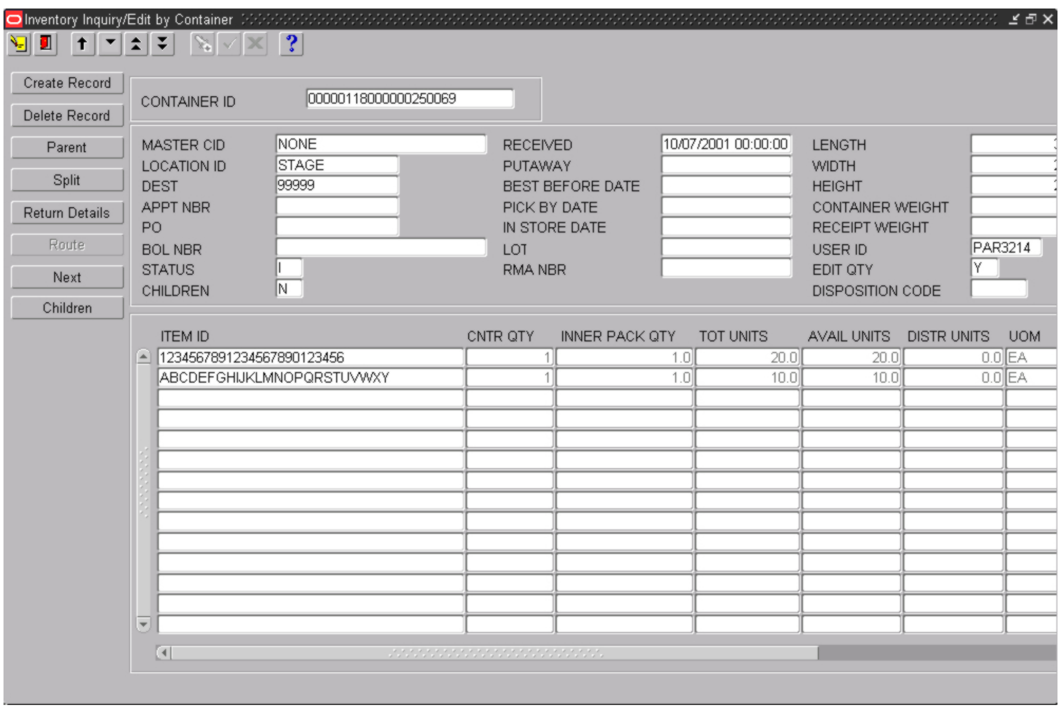
1. If any units of measure are currently displayed, click the clear button.
2. Click the enter query button.
3. In either the UOM or Class query fields, enter the abbreviation for the unit of measure (UOM) or the type of UOM, or click the LOV button and select the UOM or type of UOM.
4. Click the execute query button. The details and conversion factors for the selected UOM or type of UOM appear.

## Exit the UOM Inquiry Window

- Click the exit button to close the window.

# View Inventory by Container

**Navigate:** From the main menu, select Inventory Management > Inventory Inquiry/Edit by Container. The Inventory Inquiry/Edit by Container window opens.




**Inventory Inquiry/Edit by Container Window**

**Note:** You can also access this window from the following windows: Inventory Inquiry by Item, Inventory Inquiry by Location, Inventory Inquiry by Order, Inventory Inquiry by Vendor, WIP Audit Outbound, and Stock Order Inquiry Screen.

## Display Inventory by Container

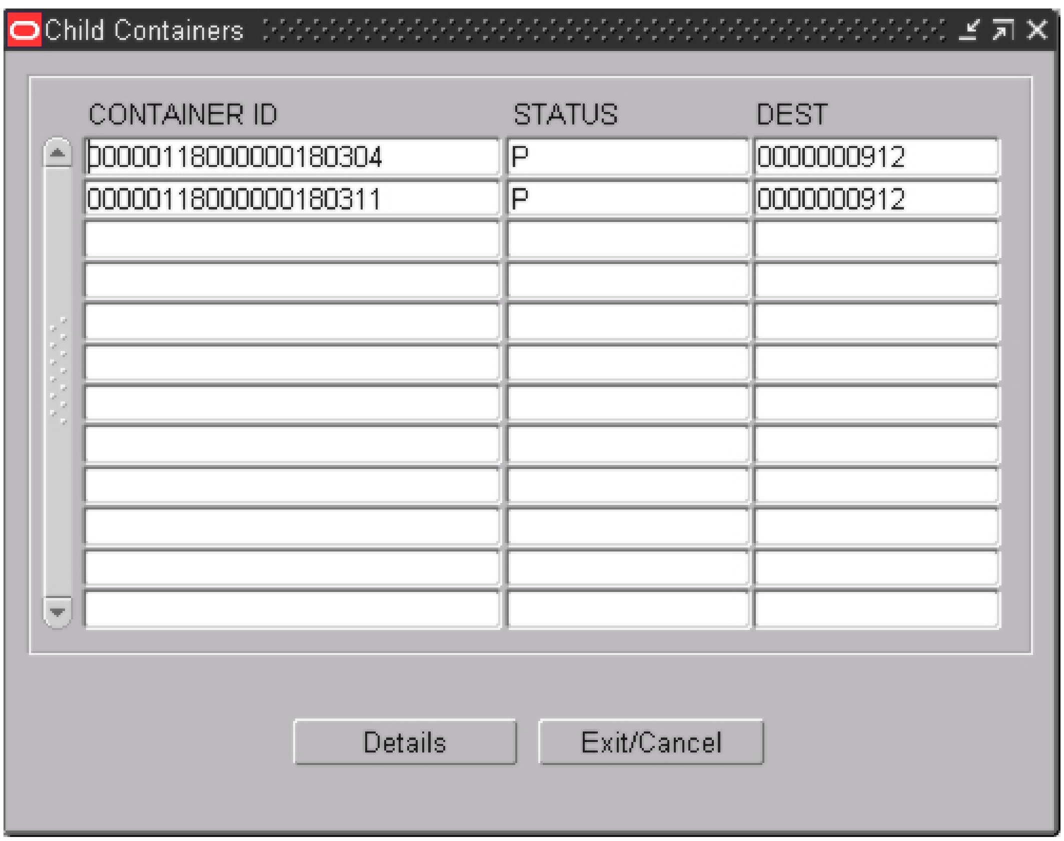
1. If inventory for a container is currently displayed, click the clear button.
2. Click the enter query button.
3. In the Container ID query field, enter the container ID, or click the LOV button and select the container.
4. Click the execute query button. The inventory for the selected container is displayed.

> **Note:** There are three blocks in this window. From top to bottom, they are referred to as the Query block, Container block, and Item block.

## Display Child Containers

> **Note:** If a Y appears in the Children field, then the current container has one or more child containers.

1. On the Inventory Inquiry/Edit by Container window, click **Children**. The child containers appear on the Child Containers window.




**Child Containers Window**

2. Select the child container that you want to view in detail.
3. Click **Details**. The details of the selected child container appear in the Inventory Inquiry/Edit by Container window.

## Display a Parent Container

> **Note:** If a container ID appears in the Master CID field, then the current container has a parent container.

- On the Inventory Inquiry/Edit by Container window, click **Parent**. The details of the parent container appear in the Inventory Inquiry/Edit by Container window.

## View Returns by Container/Item

> **Note:** If the status of a container is Non-saleable (N), you can view the returns that may be associated with an item in the container.

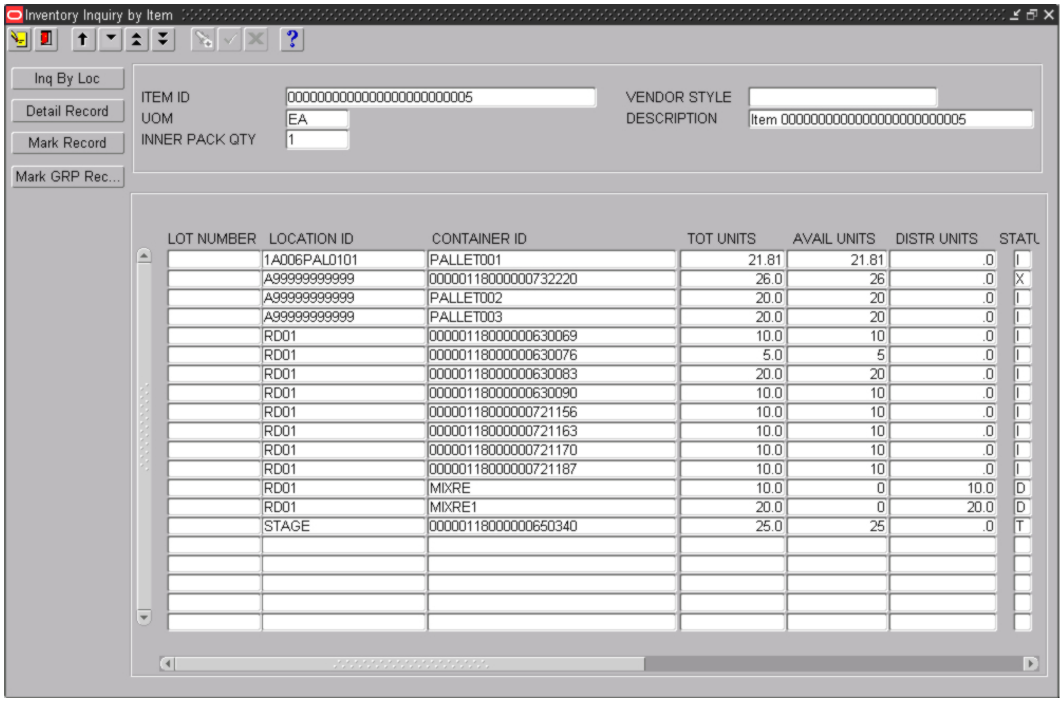
1. On the Inventory Inquiry/Edit by Container window, click **Next** to place the cursor in the Container block.
2. Click **Return Details**. The returns appear in the Return Details window.
3. Click **Exit/Cancel** to close the Return Details window.

## Exit the Inventory Inquiry/Edit by Container Window

- Click the exit button to close the window.

# View Inventory by Item

**Navigate:** From the main menu, select Inventory Management > Inventory Inquiry by Item. The Inventory Inquiry by Item window opens.




**Inventory Inquiry by Item Window**

## Display Inventory by Item

1. If inventory for an item is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In either the Item ID or Vendor Style query field, enter the ID of the item or style, or click the LOV  button and select the item or style.
4. Click the execute  query button. The inventory for the selected item or style opens.

## Mark a Location for Cycle Count

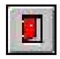
**Note**: The option to mark a location for cycle count is not available to all users. If the privilege level of the user is less than the value of the system control parameter “mm_sec_level_gu”, the following error message is displayed: “Insufficient privileges to perform the operation”.

1. On the Inventory Inquiry by Item window, select the storage location that you want to mark for cycle count.
2. Click **Mark Record**. An 'MM' opens in the Cycle Count field. The 'MM' indicates that the location was manually marked for cycle count.

## Mark All Locations for Cycle Count

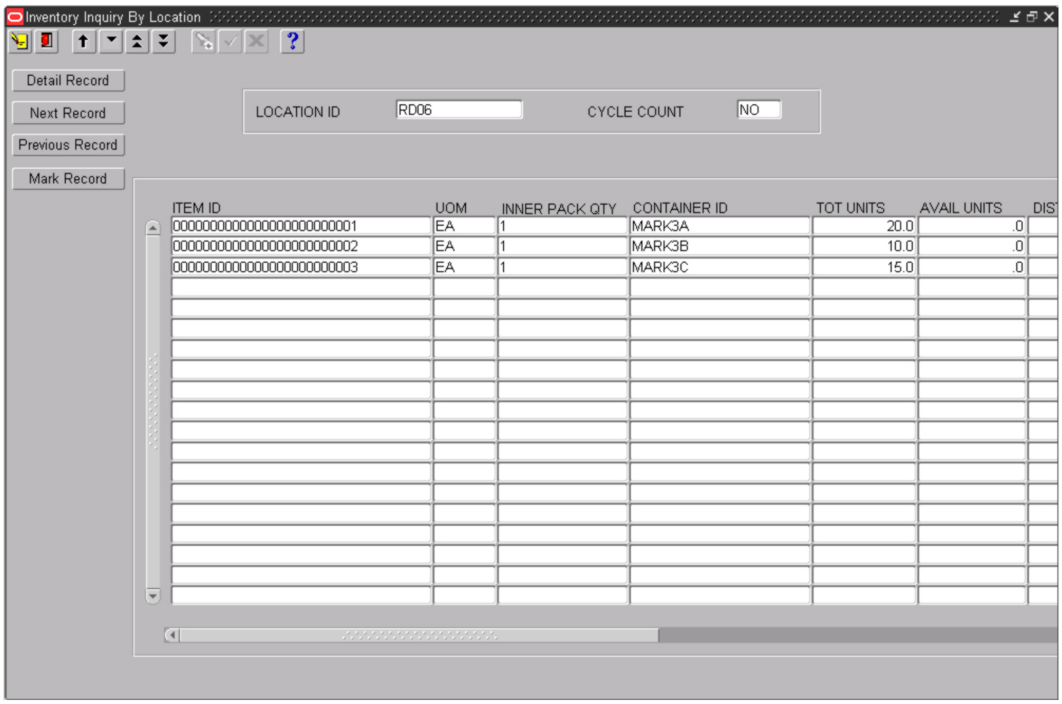
- On the Inventory Inquiry by Item window, click **Mark Grp Rec**. An 'MM' opens in the Cycle Count field for each storage location. The 'MM' indicates that the location was manually marked for cycle count.

## Exit the Inventory Inquiry by Item Window

- Click the exit  button to close the window.

# View Inventory by Location

**Navigate:** From the main menu, select Inventory Management > Inventory Inquiry by Location. The Inventory Inquiry by Location window opens.




**Inventory Inquiry by Location Window**

> **Note:** You can also access this window from the Inventory Inquiry by Item and Inventory Inquiry by Order windows.

## Display Inventory by Location

1. If inventory for a location is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Location ID query field, enter the ID of a location, or click the LOV  button and select the location.
4. Click the execute  query button. The inventory for the selected location is displayed.

## View Inventory at Other Locations

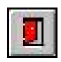
- To view inventory at the next location (in alphabetical or numerical order), click **Next Record**.
- To view inventory at the previous location (in alphabetical or numerical order), click **Previous Record**.

## Mark the Location for Cycle Count

> **Note**: The option to mark a location for cycle count is not available to all users. If the privilege level of the user is less than the value of the system control parameter "mm_sec_level_gu", the following error message is displayed: "Insufficient privileges to perform the operation".

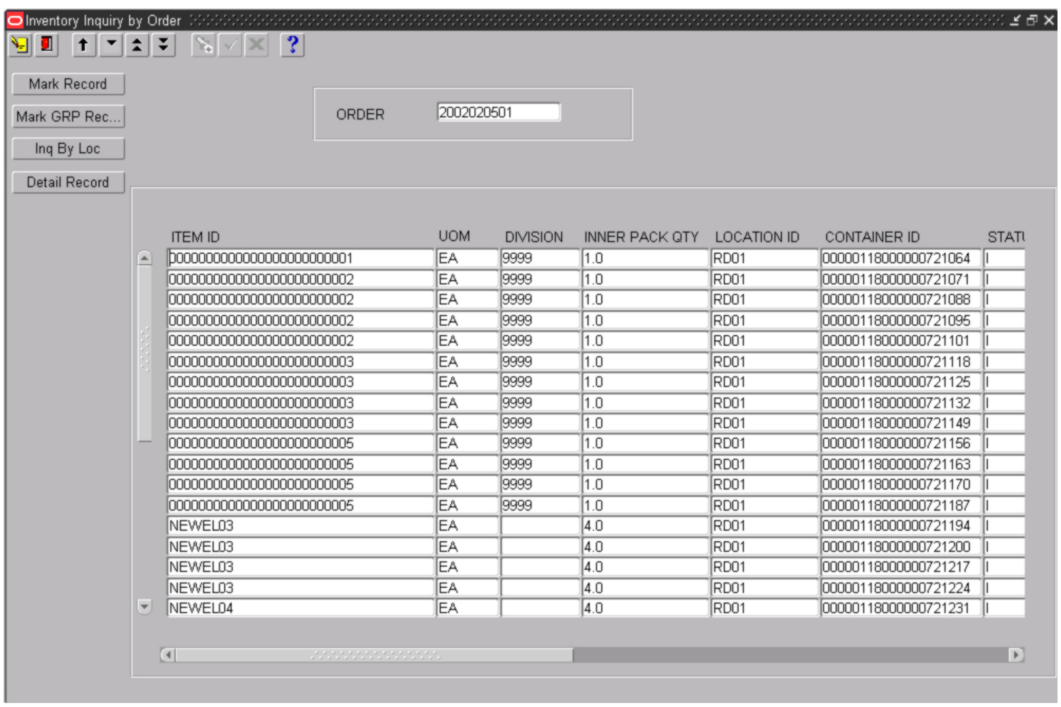
- On the Inventory Inquiry by Location window, click **Mark Record**. An 'MM' opens in the Cycle Count field. The 'MM' indicates that the location was manually marked for cycle count.

## Exit the Inventory Inquiry by Location Window

- Click the exit  button to close the window.

# View Inventory by Purchase Order

**Navigate:** From the main menu, select Inventory Management > Inventory Inquiry by Order. The Inventory Inquiry by Order window opens.




| ITEM ID | UOM | DIVISION | INNER PACK QTY | LOCATION ID | CONTAINER ID | STATU |
|---|---|---|---|---|---|---|
| 0000000000000000000000001 | EA | 9999 | 1.0 | RD01 | 00000118000000721064 | I |
| 0000000000000000000000002 | EA | 9999 | 1.0 | RD01 | 00000118000000721071 | I |
| 0000000000000000000000002 | EA | 9999 | 1.0 | RD01 | 00000118000000721088 | I |
| 0000000000000000000000002 | EA | 9999 | 1.0 | RD01 | 00000118000000721095 | I |
| 0000000000000000000000002 | EA | 9999 | 1.0 | RD01 | 00000118000000721101 | I |
| 0000000000000000000000003 | EA | 9999 | 1.0 | RD01 | 00000118000000721118 | I |
| 0000000000000000000000003 | EA | 9999 | 1.0 | RD01 | 00000118000000721125 | I |
| 0000000000000000000000003 | EA | 9999 | 1.0 | RD01 | 00000118000000721132 | I |
| 0000000000000000000000003 | EA | 9999 | 1.0 | RD01 | 00000118000000721149 | I |
| 0000000000000000000000005 | EA | 9999 | 1.0 | RD01 | 00000118000000721156 | I |
| 0000000000000000000000005 | EA | 9999 | 1.0 | RD01 | 00000118000000721163 | I |
| 0000000000000000000000005 | EA | 9999 | 1.0 | RD01 | 00000118000000721170 | I |
| 0000000000000000000000005 | EA | 9999 | 1.0 | RD01 | 00000118000000721187 | I |
| NEWEL03 | EA | | 4.0 | RD01 | 00000118000000721194 | I |
| NEWEL03 | EA | | 4.0 | RD01 | 00000118000000721200 | I |
| NEWEL03 | EA | | 4.0 | RD01 | 00000118000000721217 | I |
| NEWEL03 | EA | | 4.0 | RD01 | 00000118000000721224 | I |
| NEWEL04 | EA | | 4.0 | RD01 | 00000118000000721231 | I |

**Inventory Inquiry by Order Window**

## Display Inventory by Purchase Order

1. If inventory for a purchase order is currently displayed, click the clear button.
2. Click the enter query button.
3. In the Order query field, enter the purchase order number, or click the LOV button and select the purchase order.
4. Click the execute query button. The inventory for the selected purchase order opens.

## Mark a Location for Cycle Count

**Note**: The option to mark a location for cycle count is not available to all users. If the privilege level of the user is less than the value of the system control parameter "mm_sec_level_gu", the following error message is displayed: "Insufficient privileges to perform the operation".

1. On the Inventory Inquiry by Order window, select the storage location that you want to mark for cycle count.
2. Click **Mark Record**. An 'MM' opens in the Cycle Count field. The 'MM' indicates that the location was manually marked for cycle count.

## Mark all Locations for Cycle Count

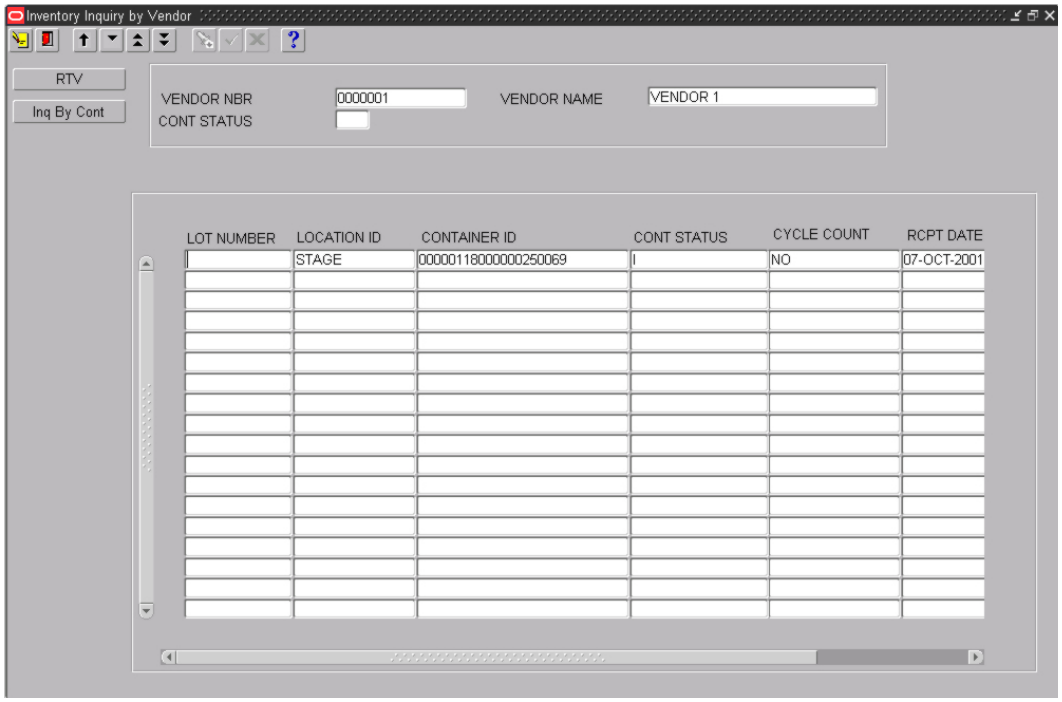
- On the Inventory Inquiry by Order window, click **Mark Grp Rec**. An 'MM' opens in the Cycle Count field for each storage location. The 'MM' indicates that the location was manually marked for cycle count.

## Exit the Inventory Inquiry by Order Window

- Click the exit button to close the window.

# View Inventory by Vendor or Container Status

**Navigate:** From the main menu, select Inventory Management > Inventory Inquiry by Vendor. The Inventory Inquiry by Vendor window opens.




**Inventory Inquiry by Vendor Window**

## Display Inventory by Vendor or Container Status

1. If inventory for a vendor is currently displayed, click the clear button.
2. Click the enter query button.
3. To search for inventory by vendor number, enter the vendor number in the Vendor Nbr field, or click the LOV button and select the vendor.
   To search for inventory by container status, enter the abbreviation for the container status in the Cont Status field.
   To search for inventory by vendor number and container status, enter criteria in both query fields.
4. Click the execute query button. The inventory for the selected item opens.

## Mark a Location for Cycle Count

1. On the Inventory Inquiry by Vendor window, select the storage location that you want to mark for cycle count.
2. Click **Mark Record**. An 'MM' opens in the Cycle Count field. The 'MM' indicates that the location was manually marked for cycle count.

## Mark All Locations for Cycle Count

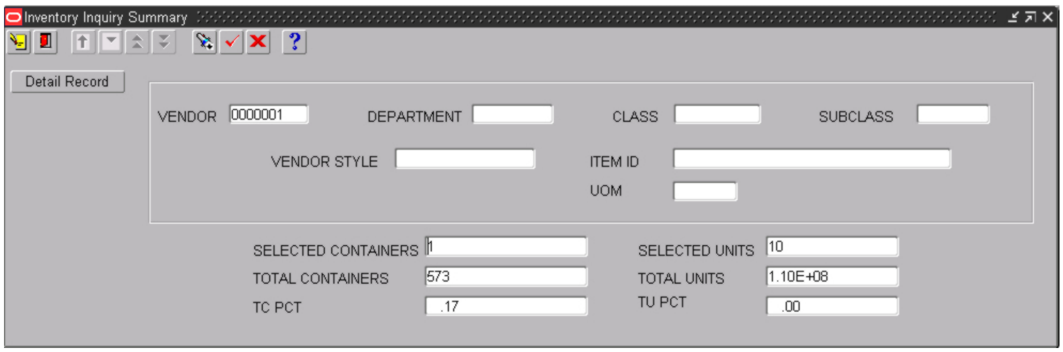
- On the Inventory Inquiry by Vendor window, click **Mark Grp Rec**. An 'MM' opens in the Cycle Count field for each storage location. The 'MM' indicates that the location was manually marked for cycle count.

## Exit the Inventory Inquiry by Vendor Window

- Click the exit button to close the window.

# View Inventory Summaries

**Navigate:** From the main menu, select Inventory Management > Inventory Inquiry Summary. The Inventory Inquiry Summary window opens.



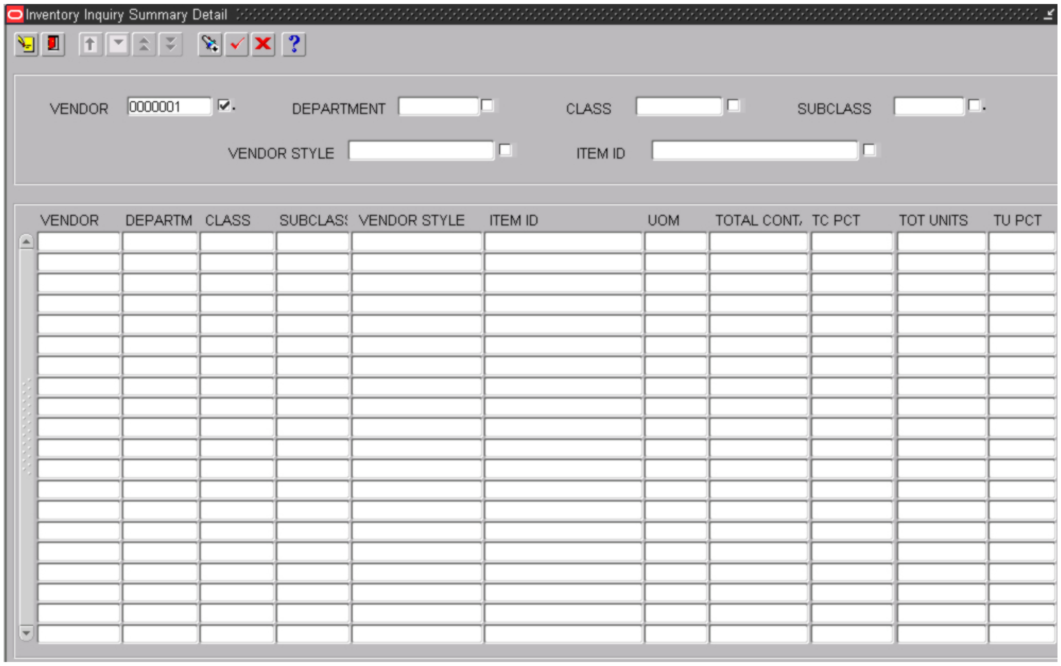

**Inventory Inquiry Summary Window**

## Query the Inventory

1. Click the enter query button.
2. Enter criteria in the one or more of the query fields, or click the desired LOV buttons and select the criteria.
3. Click the execute query button. The inventory totals and percentages are calculated by container and unit for the selected criteria.

## View Inventory Details

1. On the Inventory Inquiry Summary window, click **Detail Record**. The Inventory Inquiry Summary Detail window opens.

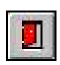



**Inventory Inquiry Summary Detail Window**

2. Select the check box next to each category that you want to view in detail.

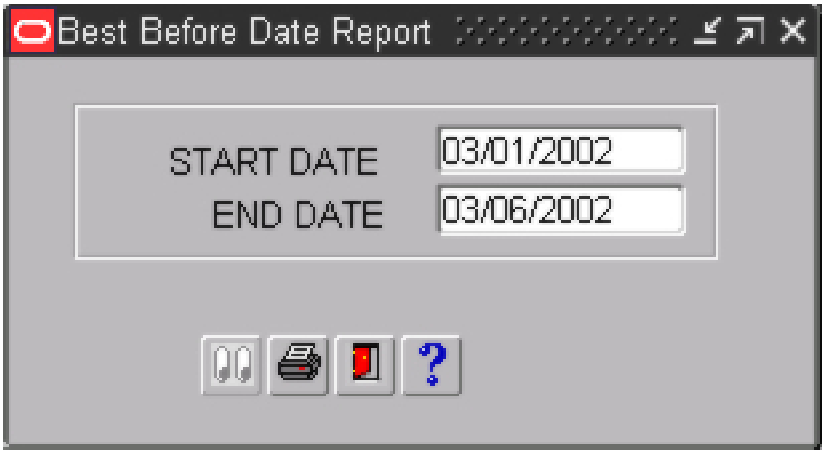
3. Click the execute query  button. The details appear for the selected categories.

## Exit the Inventory Inquiry Summary Windows

- Click the exit  button to close the windows.

## Generate the Best Before Date Report

**Navigate:** From the main menu, select Inventory Management > Reports > Best Before Date Report. The Best Before Date Report window opens.

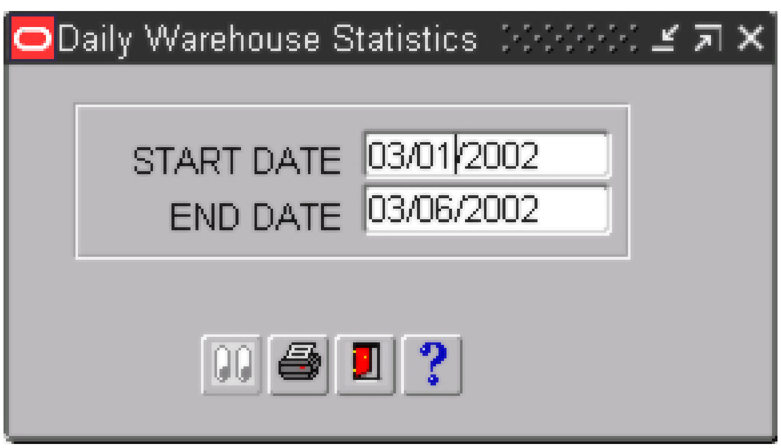



**Best Before Date Report Window**

1. In the Start Date and End Date fields, enter the range of dates that you want to include in the report.
2. Click the print  button. The report is sent to the default destination.

## Generate the Daily Warehouse Statistics Report

**Navigate:** From the main menu, select Inventory Management > Reports > Daily Warehouse Statistics - Audit. The Daily Warehouse Statistics window opens.

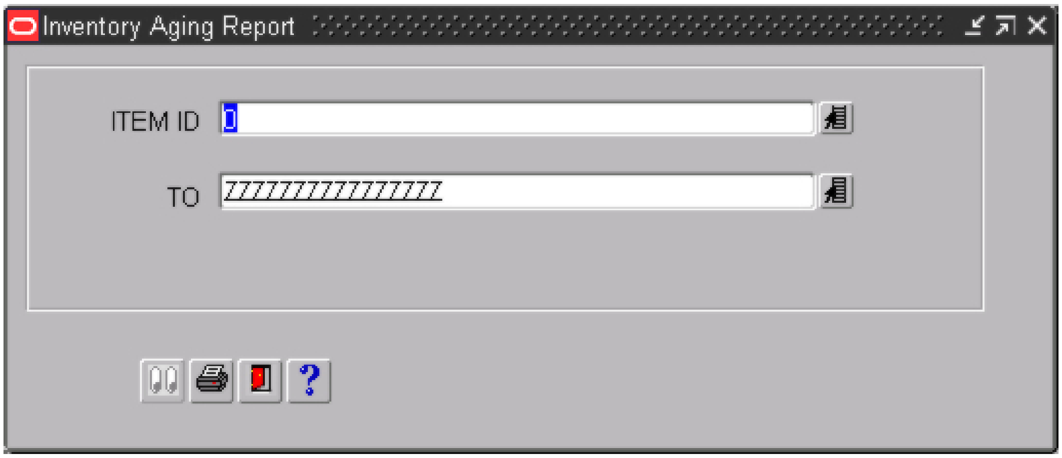



**Daily Warehouse Statistics Window**

1. In the Start Date and End Date fields, enter the range of dates that you want to include in the report.
2. Click the print  button. The report is sent to the default destination.

# Generate the Inventory Aging Report

**Navigate:** From the main menu, select Inventory Management > Reports > Inventory Aging. The Inventory Aging Report window opens.

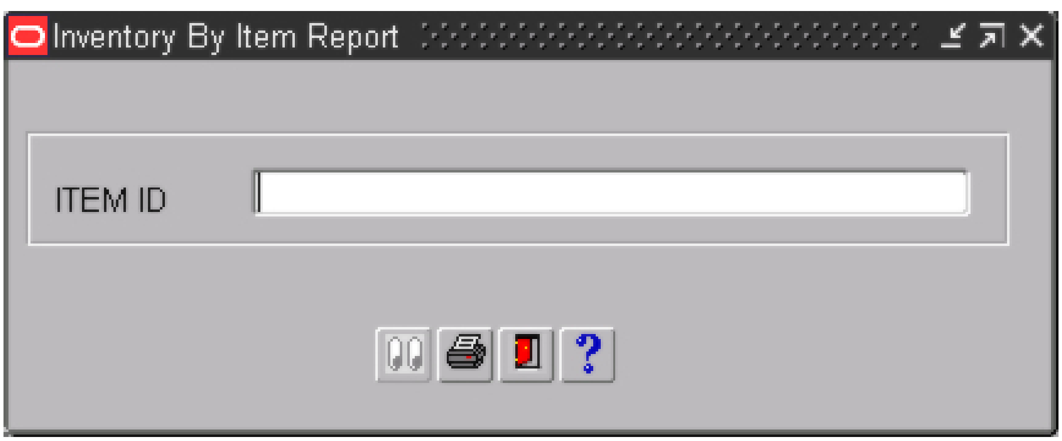



**Inventory Aging Report Window**

1. In the Item ID and To fields, select the range of items to be included in the report:
   - To include all items, use the default entries of zero in the Item ID field and multiple Z's in the To field.
   - To include one item, enter the same item ID in both fields.
   - To include a range of items, select the lowest item ID in the Item ID field. Select the highest item ID in the To field. You can enter full or partial item IDs.
2. Click the print  button. The report is sent to the default destination.

# Generate the Inventory by Item Report

**Navigate:** From the main menu, select Inventory Management > Reports > Inventory by Item. The Inventory by Item Report window opens.

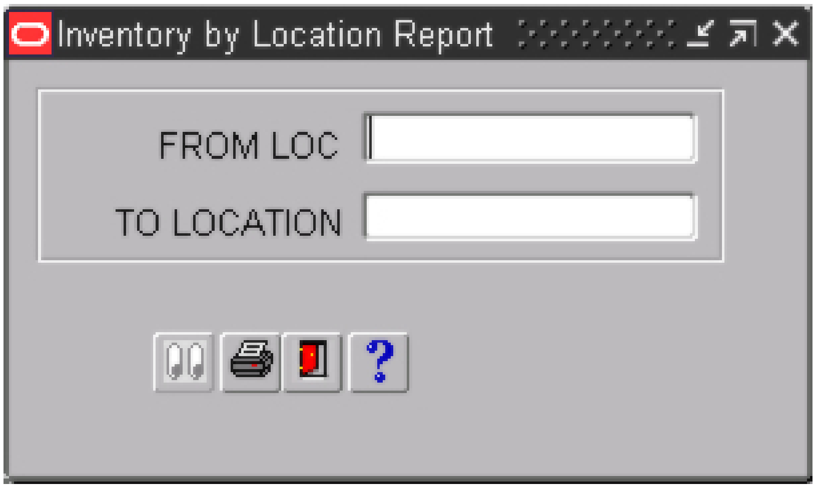



**Inventory by Item Report Window**

1. In the Item ID field, enter the ID of the item to be included in the report.
2. Click the print  button. The report is sent to the default destination.

# Generate the Inventory by Location Report

**Navigate:** From the main menu, select Inventory Management > Reports > Inventory by Location. The Inventory by Location Report window opens.

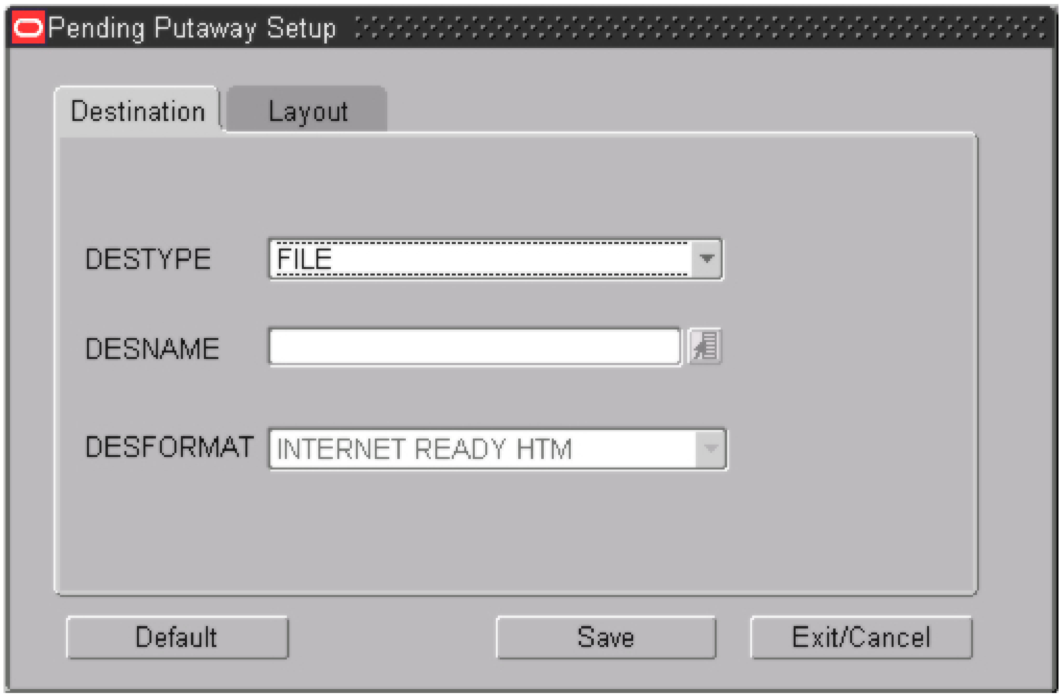



**Inventory by Location Report Window**

3. In the From Loc and To Location fields, enter the range of locations to be included in the report:
   - To include all locations, enter zero in the From Loc field and multiple Z's in the To Location field.
   - To include one location, enter the same location ID in both fields.
   - To include a range of locations, enter the lowest location ID in the From Loc field. Enter the highest location ID in the To Location field. You can enter full or partial location IDs.
4. Click the print  button. The report is sent to the default destination.

# Generate the Pending Putaway Report

**Navigate:** From the main menu, select Inventory Management > Reports > Pending Putaways. The Pending Putaway Setup window opens.




**Pending Putaway Setup Window**

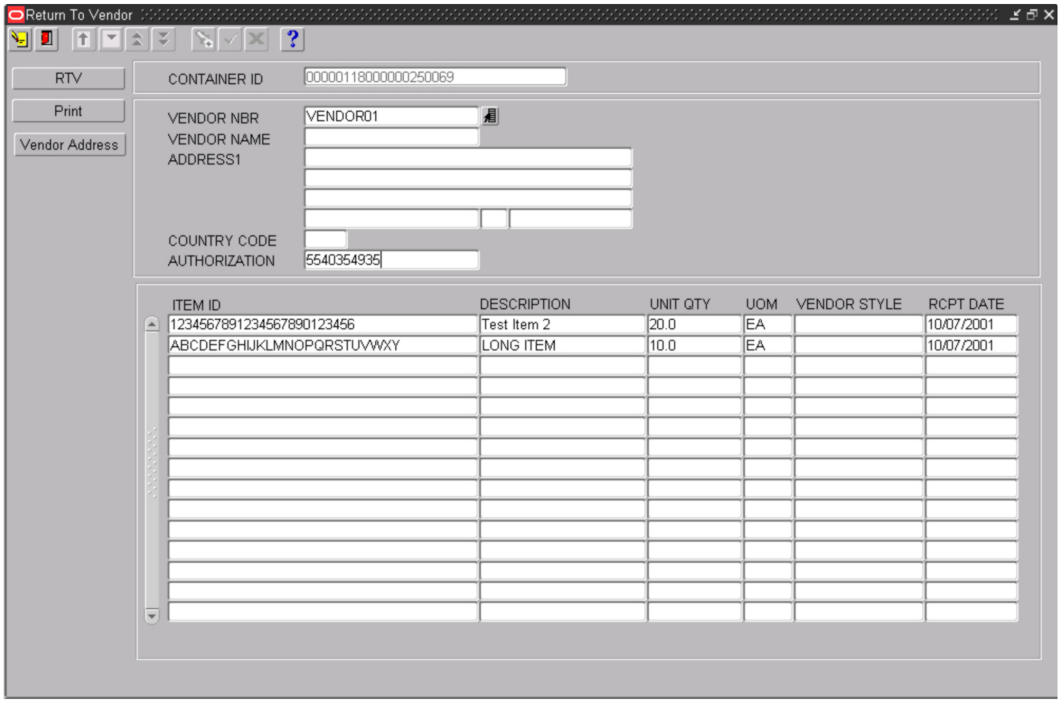
1. In the Destype field, select the type of destination.
2. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

3. To view the layout of the report, click on the Layout tab.
4. Click **Save**. The report is sent to the selected destination.

# Generate the Return to Vendor Advice Report

**Navigate:** From the main menu, select Inventory Management > Reports > Return to Vendor Advice. The Return to Vendor Report window opens.




**Return to Vendor Report Window**

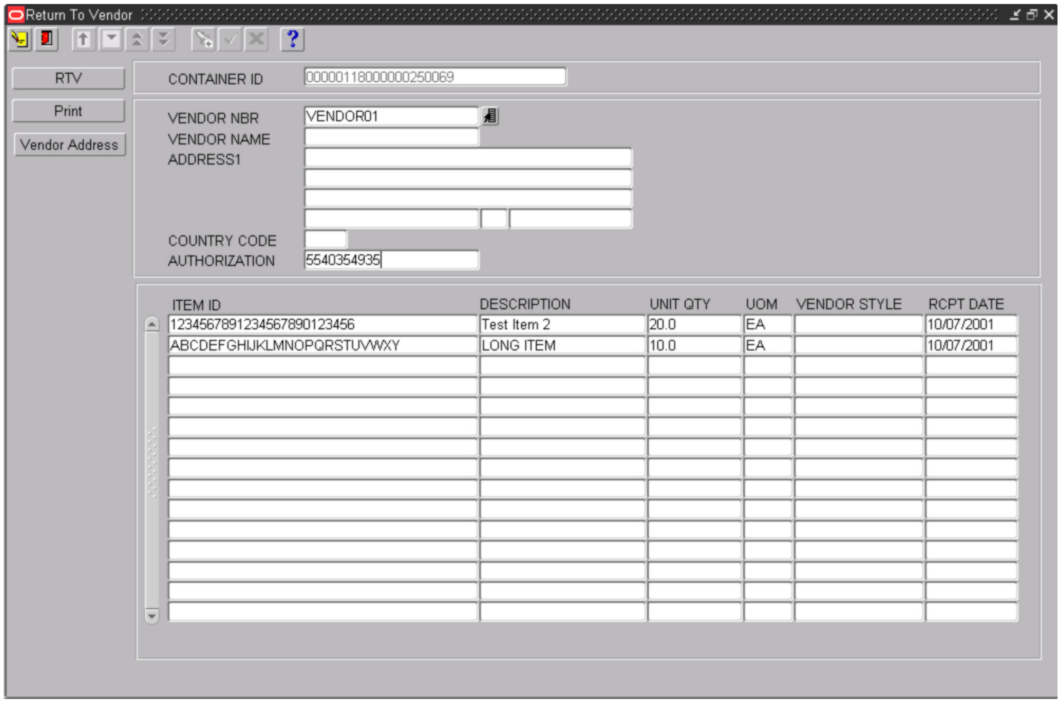
> **Note:** This report can also be generated when you process an RTV using the Return to Vendor window.

1. In the RTV ID field, enter the ID of the Return to Vendor record that you want to include in the report.

2. Click the print  button. The report is sent to the default destination.

# Generate the Return to Vendor Report

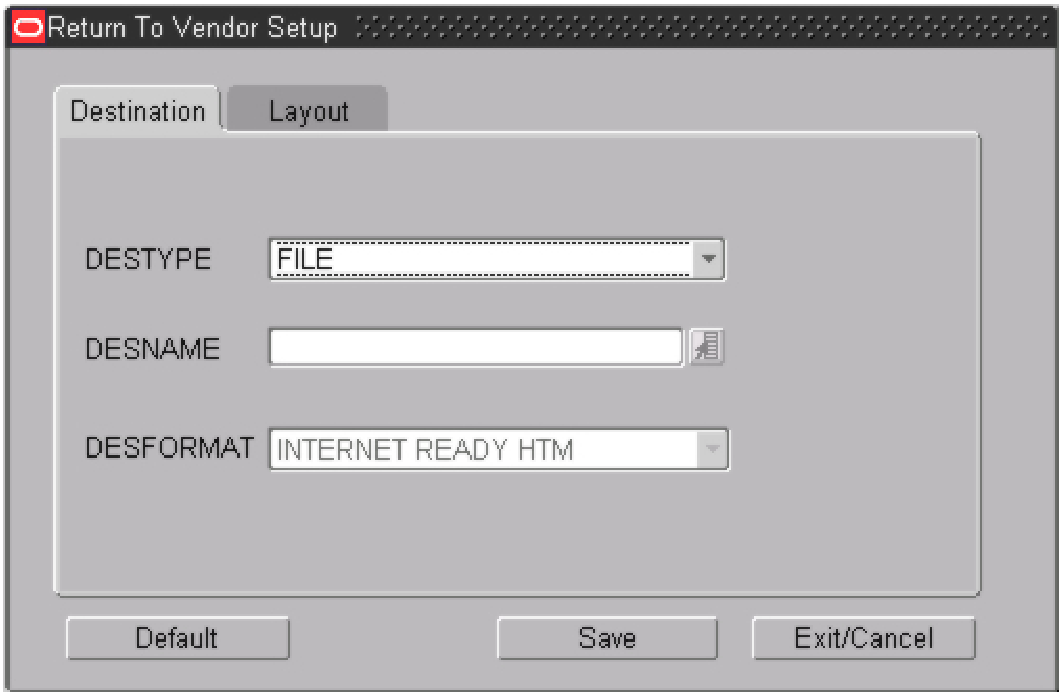
**Navigate:** From the main menu, select Inventory Management > Return to Vendor. The Return to Vendor window opens.




**Return to Vendor Window**

**Note:** You can also access this window from the Inventory Inquiry by Vendor window.

1. On the Return to Vendor window, enter the vendor number in the Vendor Nbr field.
2. In the Authorization field, enter the authorization number for the return.
3. Click **Print**. The Return to Vendor Setup window opens.




**Return to Vendor Setup Window**

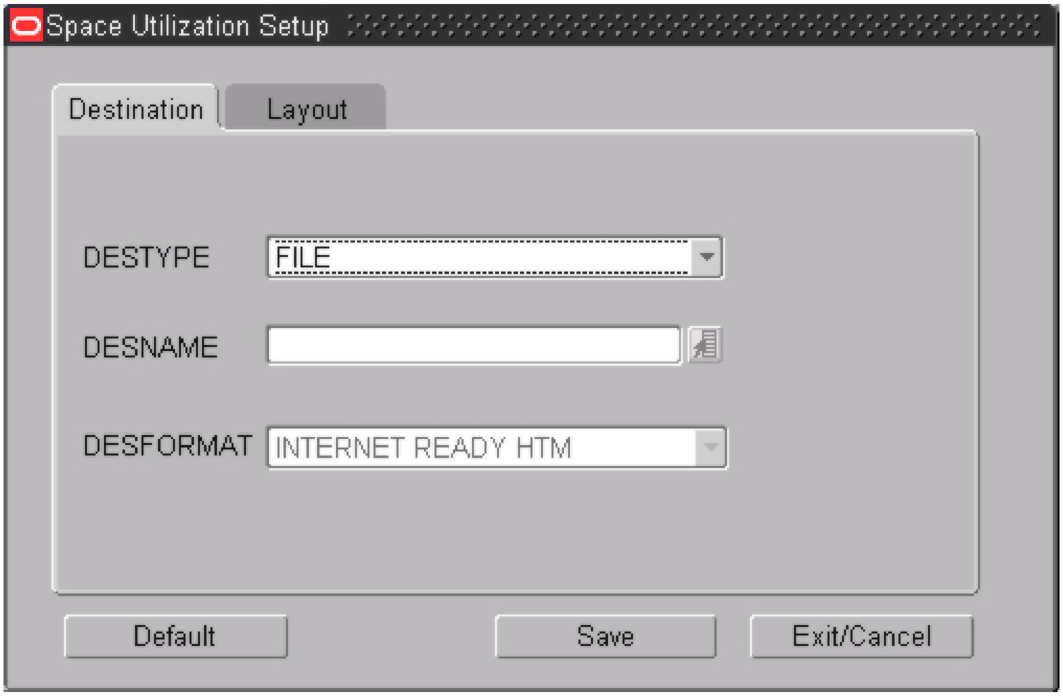
4. In the Destype field, select the type of destination.
5. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

6. To view the layout of the report, click on the Layout tab.
7. Click **Save**. The report is sent to the selected destination.

# Generate the Space Utilization Report

**Navigate:** From the main menu, select Inventory Management > Reports > Space Utilization. The Space Utilization Setup window opens.




**Space Utilization Setup Window**

1. In the Destype field, select the type of destination.
2. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

3. To view the layout of the report, click on the Layout tab.
4. Click **Save**. The report is sent to the selected destination.

# 7 Distribution Planning

## Distribution Planning Overview

Distribution planning can begin when stock orders are received from the host system or manually entered into RWMS. Some stock orders received from the host are processed automatically. Manually-entered orders and orders marked as manual or PO by the host must be processed manually.

Stock orders are replenishment requests by stores. These stock orders are referred to as distros. For a distribution center that supplies merchandise directly to the consumer, a stock order represents a customer order. A customer order may be spread across one or multiple distros based on the cartonization process. For example, if the system determines that a customer order with five items fits into two outbound shipping containers, a distro is created for each container.

Stock orders are categorized as pre-allocations, post allocations, and post allocations by PO depending on how the orders are filled.

- Pre-allocation: Distribution of inbound merchandise. Pre-allocations enter the system in one of two ways: 1) Stock order and stock allocation records are received from the host. The records contain detailed information for both ASN and non-ASN receipts. 2) Vendors enter ASN information into RWMS via the Web.
- Post allocation: Distribution of merchandise after it is received and put away in storage locations. RWMS distributes merchandise by identifying all containers eligible for bulk picking, then container picking. The remaining allocations are satisfied through a unit pick system.
- Post allocation by purchase order: RWMS examines all containers in storage and staging locations and retrieves eligible inventory based on the user-entered purchase order that is associated with a stock order.

When manual and PO type stock orders are selected for distribution, they are assigned to available waves.

Each wave may use one of the following distribution methods:

- Efficiency: The picker is sent to a sequence of locations that fulfills the demand in the least distance traveled. This minimizes walking time for the picker. The picker picks from each location until is it empty.
- Pick to clean: The picker is sent to the most locations that can be picked clean in order to meet the demand. This frees up the most locations, which can then be used to store other inbound merchandise.

## Business Process

If you manually create a stock order, you must assign it to an available wave. Should the appropriate wave not exist, you can create a wave. Manual and PO type stock orders that are received from the host must also be assigned to waves. You can select such stock orders using predefined queries or sets of queries.

A wave is a group of orders that can be released together for picking and shipment. The distribution process varies by the type of wave used to distribute merchandise. The type of wave may be:

- Automatic: All open, automatic orders that are eligible for distribution are assigned to the next available wave of the type Automatic. These assignments are controlled by the host.
- Manual: DC personnel select manual type orders and assign them to available waves of the type Manual.
- PO: DC personnel select PO type orders and assign them to available waves of the type PO.
- Predist: If inbound containers contain a pre-allocated item that can be shipped directly without exceeding the requested quantity, the system assigns the order to an available wave of the type Predist.
- Wave: DC personnel assign specific destinations to daily pick waves of the type Wave.

After you assign the wave distribution processes, you can estimate the staffing plan by associating process percentages to the wave and entering the hours needed to complete the wave.

There are several windows that allow you to monitor the progress of orders, pick waves, and pack waves. You can view the percentages of an order that are at the various stages of processing. You can view the planned and picked quantities for bulk, case, and unit operations by wave and by destination. Pick directives can be viewed and purged from the system.

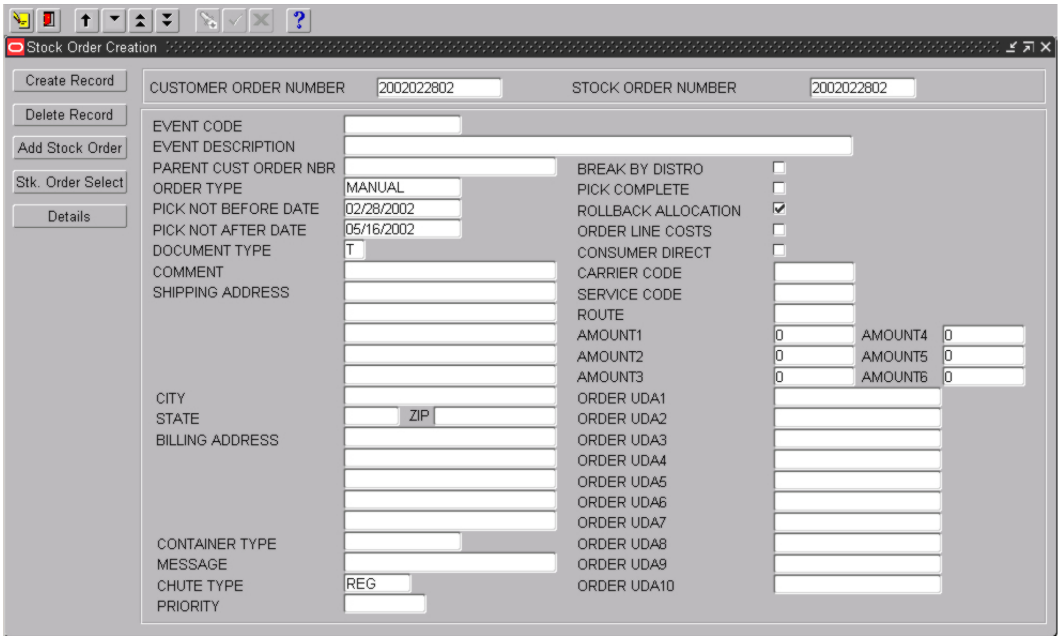
## Reports

The following distribution reports are available for distribution planning:

- Outstanding Orders report: Provides a list of undistributed or partially distributed stock orders.
- Pending Picks report: Provides a list of pending picks by wave and type of operation (bulk, container, replenishment, and unit).
- Pick Package Audit report: Indicates where problems may have occurred when a pick package was printed for a wave.
- PTS Containers to Close report: Provides a list of put to store containers that have been open longer than a preset number of days.
- Wave Preview report: Provides a breakdown by operation (bulk, case, replenishment, and unit) for a tentative manual wave.

# Maintain Manual Stock Orders

**Navigate:** From the main menu, select Distribution Planning > Stock Order Creation. The Stock Order Creation window opens.




**Stock Order Creation Window**

## Display a Manual Stock Order

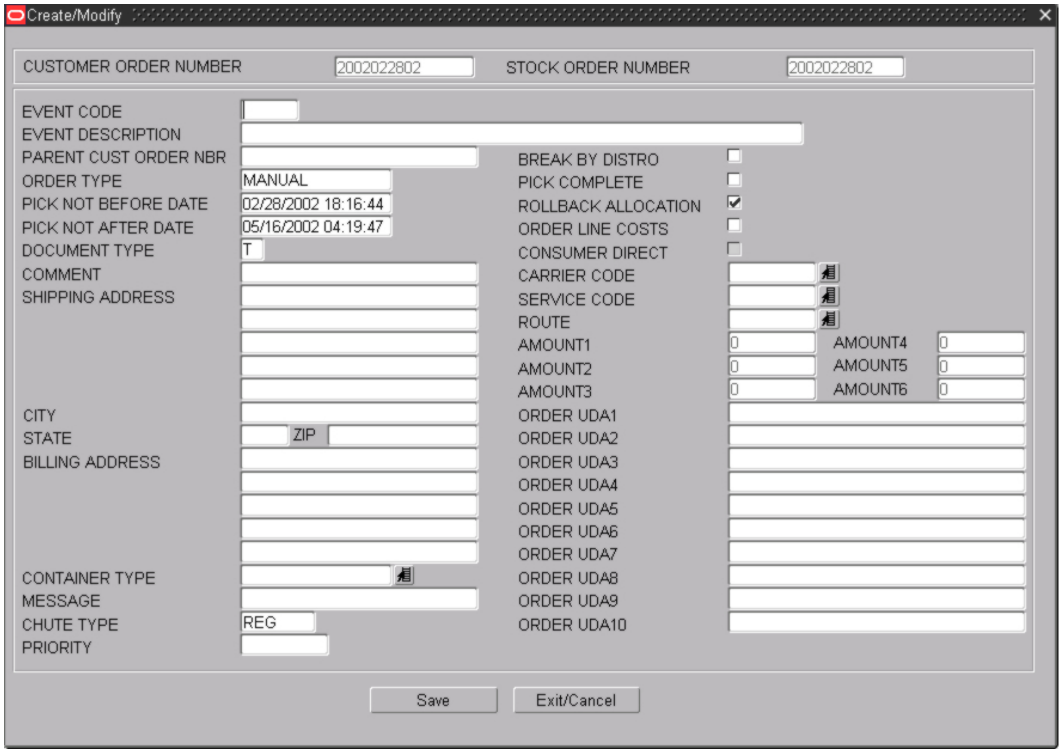
1. If a stock order is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Customer Order Number query field, enter the customer order number, or click the LOV  button and select the customer order number.
4. In the Stock Order Number query field, enter the stock order number, or click the LOV  button and select the stock order number.

   **Note:** The stock order number is required if more than one stock order is associated with the customer order.

5. Click the execute query  button. The details of the selected stock order appear.

## Edit a Manual Stock Order

1. On the Stock Order Creation window, double-click any field other than a query field. The Create/Modify window opens.

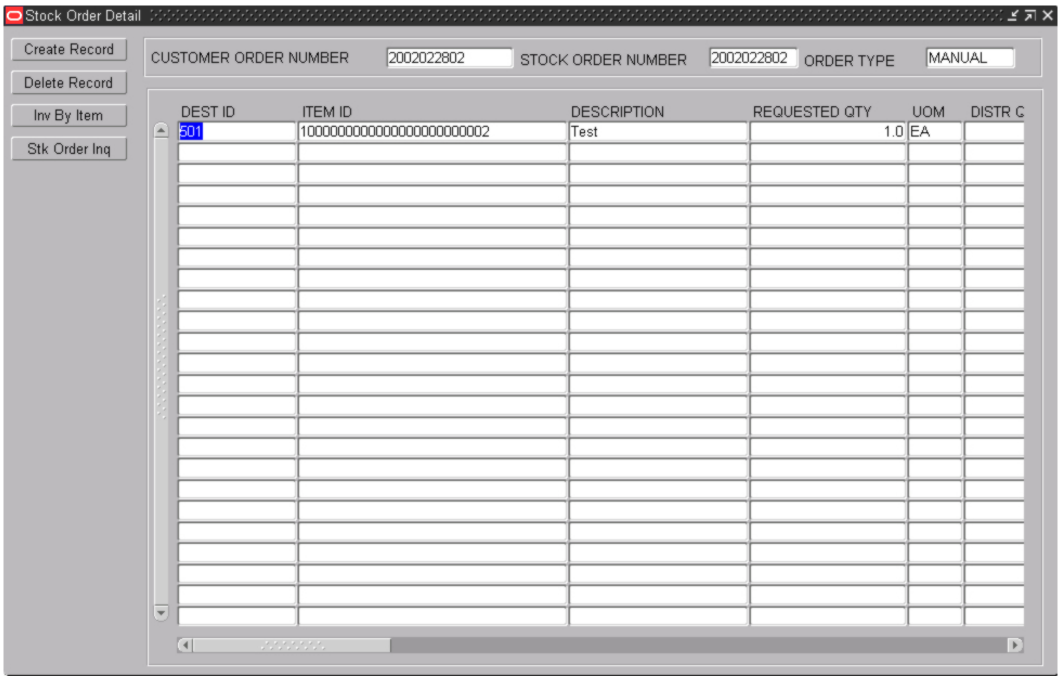



**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. To edit destination details:
   a. Click **Details**. The Stock Order Detail window opens.
   b. Double-click the destination record that you want to edit. The Create/Modify window opens.
   c. Edit the enabled fields as necessary.
   d. Click **Save** to save any changes and close the Create/Modify window.
   e. Click the exit  button to close the Stock Order Detail window.
4. Click **Save** to save the changes and close the Create/Modify window.

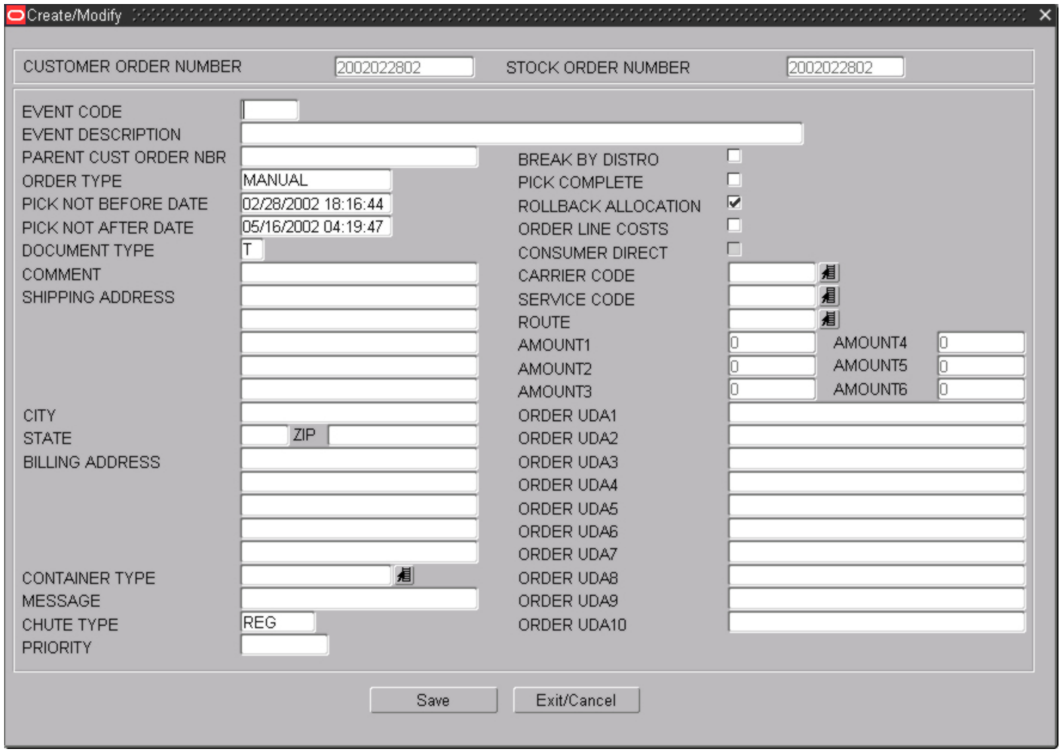
## Add a Manual Stock Order

1. On the Stock Order Creation window, click **Create Record**. The Create/Modify window opens. The Customer Order Number and the Stock Order Number fields are automatically filled in.
2. Enter as many details as are known.
3. Click **Save** to save the changes and close the Create/Modify window.
4. To add destination details:
   a. Click **Details**. The Stock Order Detail window opens.




**Stock Order Detail Window**

   b. Click **Create Record**. The Create/Modify window opens.




**Create/Modify Window**

c. In the Dest ID field, enter the destination ID, or click the LOV button and select the destination.

d. In the Item ID field, enter the item ID, or click the LOV button and select the item.

e. In the Order Line Nbr, enter a line number that is unique for the current stock order.

f. Enter as many details as are known.

g. Click **Save** to save the changes and close the Create/Modify window.

h. Click the exit button to close the Stock Order Detail window.

5. To create another stock order under the same customer order number, click **Add Stock Order**. The Create/Modify window opens.

## Delete Location Details

1. On the Stock Order Creation window, click **Details**. The Stock Order Detail window opens.
2. Select the record that you want to delete.
3. Click **Delete Record**.
4. When prompted to delete the record, click **Yes**.
5. Click the exit button to close the Stock Order Detail window.

## Delete a Manual Stock Order

1. On the Stock Order Creation window, click **Delete Record**.

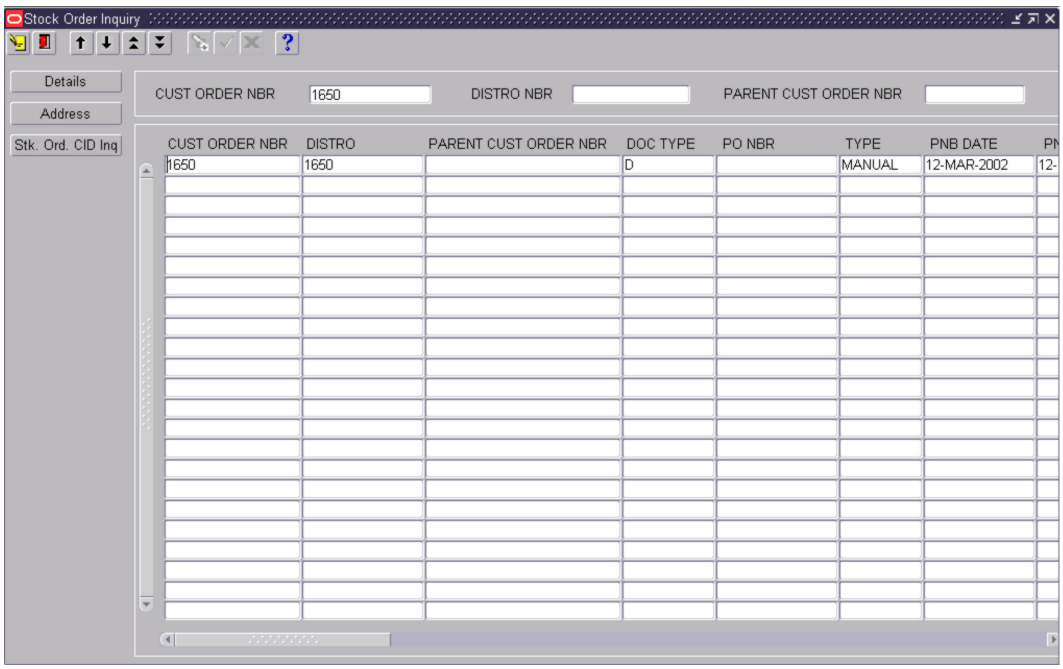
2. When prompted to delete the record, click **Yes**.

### Exit the Stock Order Creation Window

- Click the exit button to close the window.

## View Stock Orders

**Navigate:** From the main menu, select Distribution Planning > Stock Order Inquiry. The Stock Order Inquiry window opens.




**Stock Order Inquiry Window**

### Display All Stock Orders

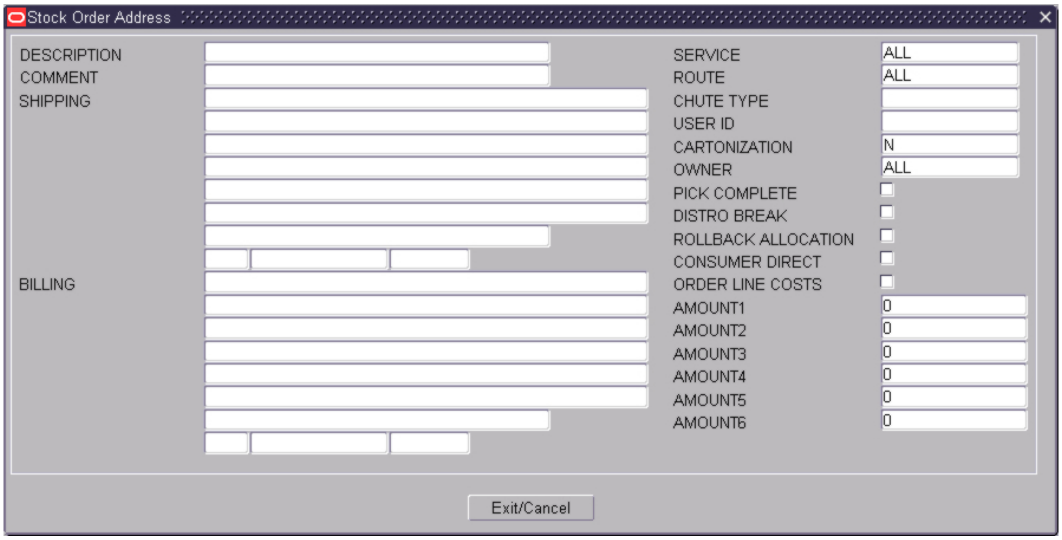
- Click the execute query button.

### Display a Subset of the Stock Orders

1. If any stock orders are currently displayed, click the clear button.
2. Click the enter query button.
3. Enter a customer order number, distro number, or parent customer order number in the appropriate query field, or click the LOV button and select the desired number.
4. Click the execute query button. The details of the selected stock orders are displayed.

### View Address and Shipping Details

1. On the Stock Order Inquiry window, select the stock order that you want to view in detail.
2. Click **Address**. The details appear on the Stock Order Address window.

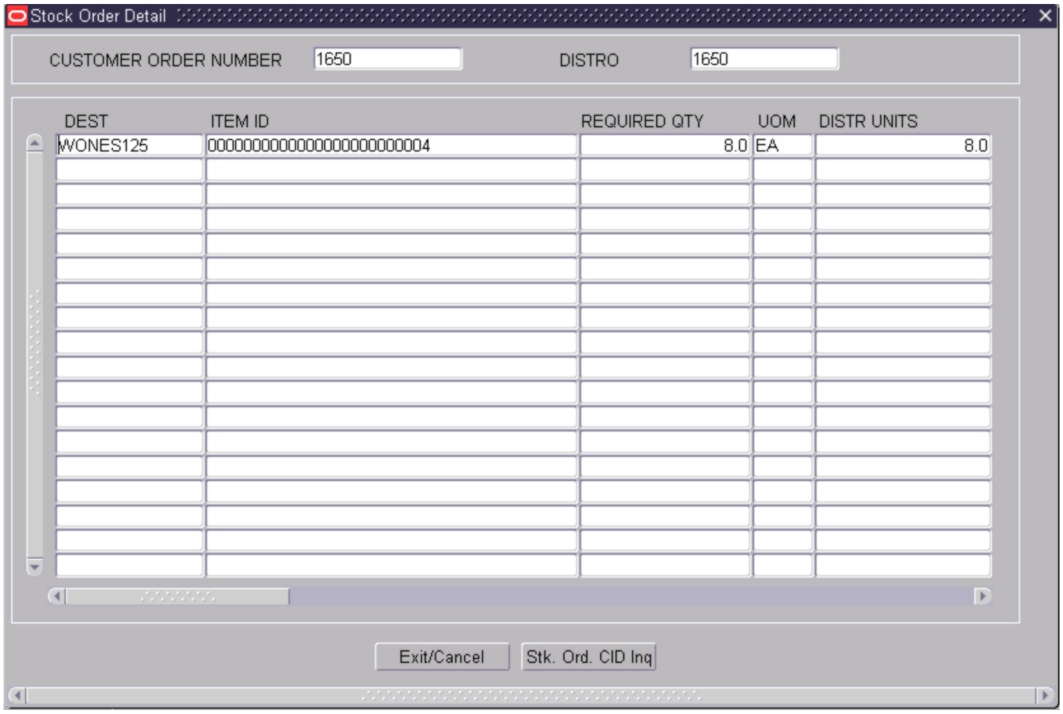



**Stock Order Address Window**

3. Click **Exit/Cancel** to close the Stock Order Address window.

## View Destinations

1. On the Stock Order Inquiry window, select the stock order that you want to view in detail.
2. Click **Details**. The details appear on the Stock Order Detail window.

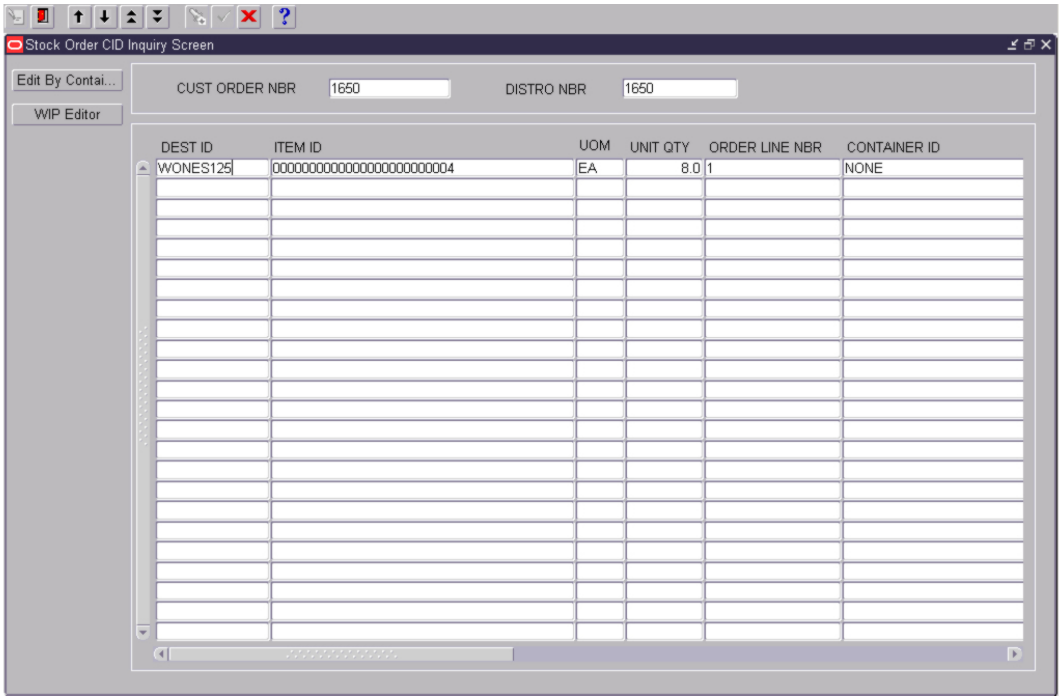



**Stock Order Detail Window**

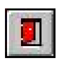
3. Click **Exit/Cancel** to close the Stock Order Detail window.

## View Containers

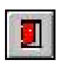
1. On the Stock Order Inquiry window, select the stock order that you want to view in detail.
2. Click **Stk Ord CID Inq**. The details appear on the Stock Order CID Inquiry Screen window.




**Stock Order CID Inquiry Screen Window**

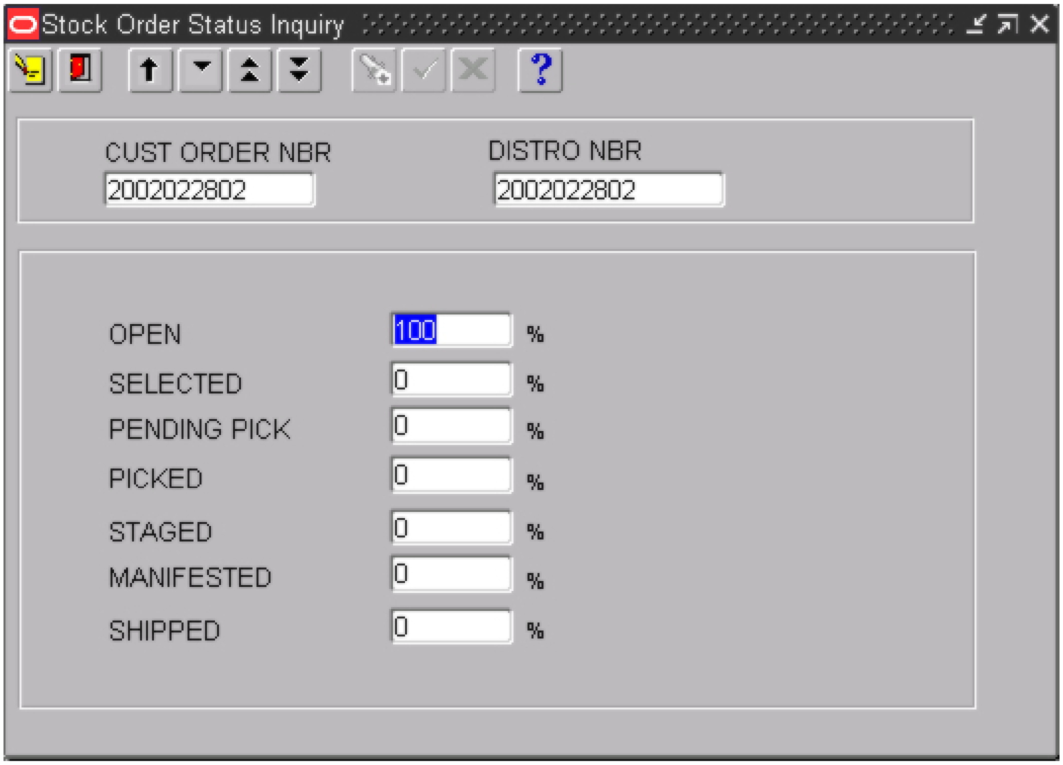
3. Click the exit  button to close the Stock Order CID Inquiry Screen window.

## Exit the Stock Order Inquiry Window

- Click the exit  button to close the window.

# View Stock Order Statuses

**Navigate:** From the main menu, select Distribution Planning > Stock Order Status Inquiry. The Stock Order Status Inquiry window opens.




**Stock Order Status Inquiry Window**

## Display the Progress of a Stock Order

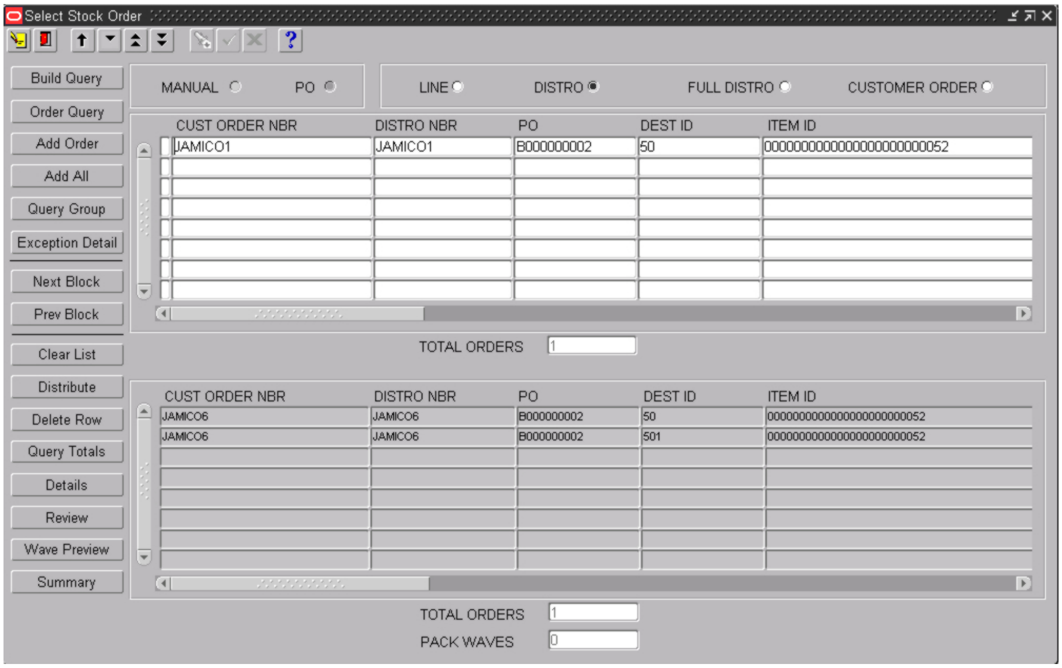
1. If a stock order is currently displayed, click the clear button.
2. Click the enter query button.
3. In the Cust Order Nbr query field, enter the customer order number, or click the LOV button and select the customer order number.
4. In the Distro Nbr query field, enter the distro number, or click the LOV button and select the distro number.
5. Click the execute query button. The progress of the selected stock order opens.

## Exit the Stock Order Status Inquiry Window

- Click the exit button to close the window.

# Distribute Manual Stock Orders

**Navigate:** From the main menu, select Distribution Planning > Select Stock Order. The Select Stock Order window opens.




**Select Stock Order Window**

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**Note:** You can also access this window from the Stock Order Creation window.

---

## Query the Stock Orders

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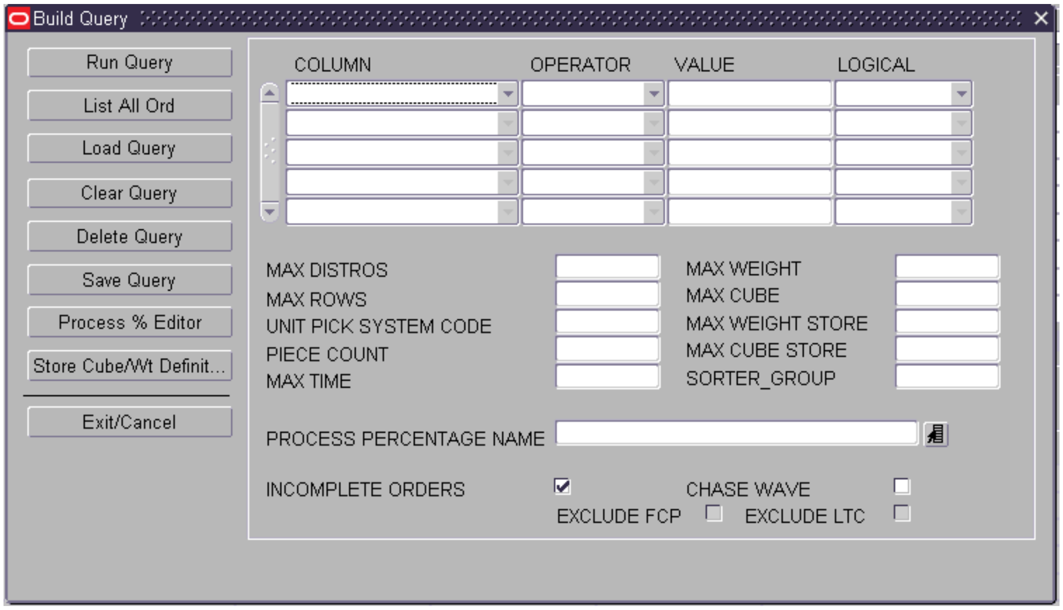
**Note:** There are two blocks on this window. They are referred to as the Query Results block and the Distribute Orders block.

---

1. Select a stock order type. The type may be:
   - Manual: Restricts the query to stock orders that are associated with customer orders. The customer orders may be received from the host system or entered manually.
   - PO: Restricts the query to stock orders that are associated with inbound purchase order receipts.
2. Select a stock order level. The level may be:
   - Customer order: For a customer order and its distros to be selected, at least one item on the order must match the selection criteria.
   - Distro: For a distro to be selected, at least one item on the distro must match the selection criteria.
   - Line: For a line item to be selected, it must match the selection criteria.
   - Full distro: For a distro to be selected, all items on the distro must match the selection criteria.

3. To display all stock orders that match the above criteria:
   a. Click **Build Query**. The Build Query window opens.




**Build Query Window**

   b. Click **List All Ord**.
   c. When prompted to run the query, click **Yes**. The results of the query appear in the Query Results block.

> **Note:** You have several tools available in order to query the stock orders. You can create and save a query, load and run a query, run a set of queries and adjust the results by query.

## Select Stock Orders for Distribution

After performing a query, move stock orders to the Distribute Orders block or remove any unnecessary stock orders from the block.

- To move a stock order to the Distribute Orders block, select the stock order and click **Add Order**.
- To move all the stock orders to the Distribute Orders block, click **Add All**.
- To remove a stock order from the Distribute Orders block, select the stock order and click **Delete Row**.
- To remove all stock orders from the Distribute Orders block, click **Clear List**.

## View Stock Order Selection Exceptions

If chutes are defined for unit pick systems, the system applies chute logic to each order line that is moved from the Query Results block to the Distribute Orders block. An X is placed to the left of each customer order in the Query Results block that does not fit into a chute for any reason. You can view the reasons on the Exception Details window.

1. On the Select Stock Order window, click **Exception Detail**. The order exceptions appear in the Exception Details window.
2. Click **Exit/Cancel** to close the Exception Details window.

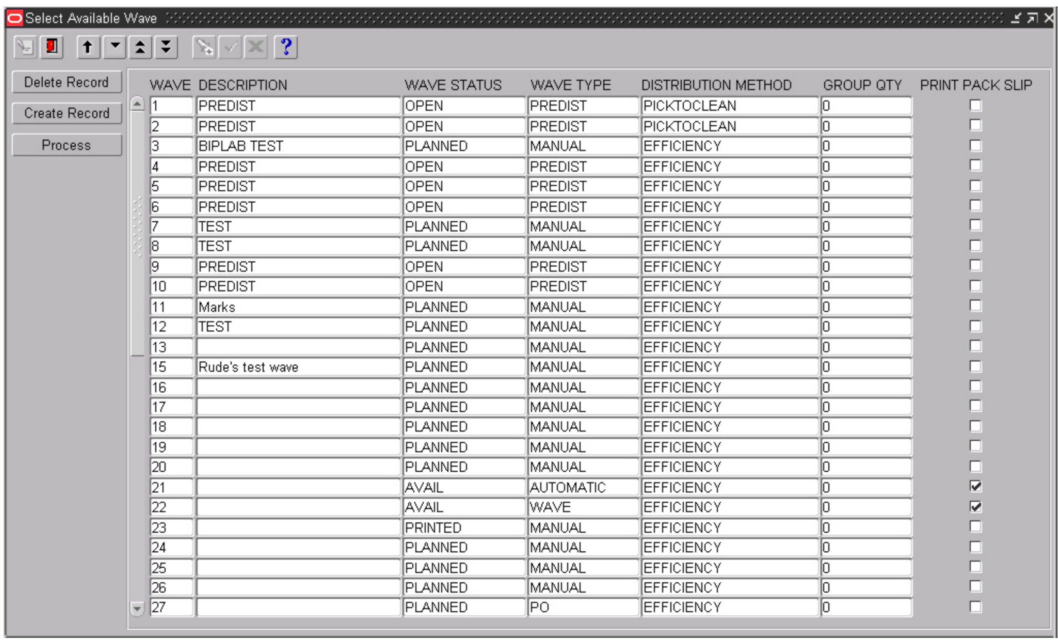
## Review the Selected Stock Orders

You can access several windows in order to review additional details for selected stock orders.

- Details for Distro Nbr: Displays the details of a selected distro by destination.
- Wave Preview: Displays details of the pick wave. You can also generate the Wave Preview report.
- Order Summary: Displays a summary of the stock orders in the Distribute Orders block.

## Distribute Selected Stock Orders

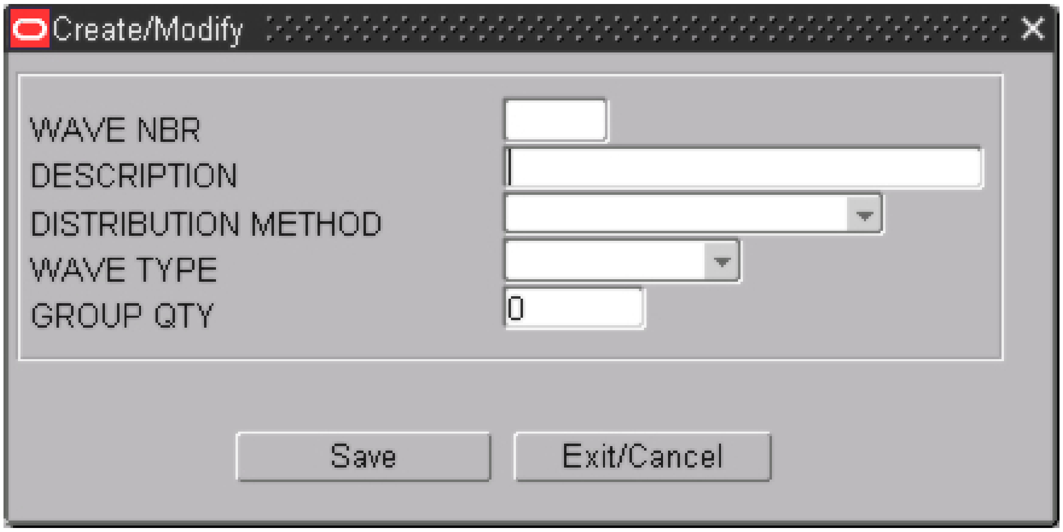
1. On the Select Stock Order window, click **Distribute**. The current pick waves appear in the Select Available Wave window.




| WAVE | DESCRIPTION | WAVE STATUS | WAVE TYPE | DISTRIBUTION METHOD | GROUP QTY | PRINT PACK SLIP |
|---|---|---|---|---|---|---|
| 1 | PREDIST | OPEN | PREDIST | PICKTOCLEAN | 0 | |
| 2 | PREDIST | OPEN | PREDIST | PICKTOCLEAN | 0 | |
| 3 | BIPLAB TEST | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 4 | PREDIST | OPEN | PREDIST | EFFICIENCY | 0 | |
| 5 | PREDIST | OPEN | PREDIST | EFFICIENCY | 0 | |
| 6 | PREDIST | OPEN | PREDIST | EFFICIENCY | 0 | |
| 7 | TEST | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 8 | TEST | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 9 | PREDIST | OPEN | PREDIST | EFFICIENCY | 0 | |
| 10 | PREDIST | OPEN | PREDIST | EFFICIENCY | 0 | |
| 11 | Marks | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 12 | TEST | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 13 | | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 15 | Rude's test wave | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 16 | | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 17 | | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 18 | | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 19 | | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 20 | | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 21 | | AVAIL | AUTOMATIC | EFFICIENCY | 0 | ✓ |
| 22 | | AVAIL | WAVE | EFFICIENCY | 0 | ✓ |
| 23 | | PRINTED | MANUAL | EFFICIENCY | 0 | |
| 24 | | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 25 | | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 26 | | PLANNED | MANUAL | EFFICIENCY | 0 | |
| 27 | | PLANNED | PO | EFFICIENCY | 0 | |

**Select Available Wave Window**

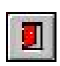
2. Select a Manual or PO pick wave with a status of Available.
   If there is no available wave, you can add a wave.
   a. On the Select Available Wave window, click **Create Record**. The Create/Modify window opens.




**Create/Modify Window**

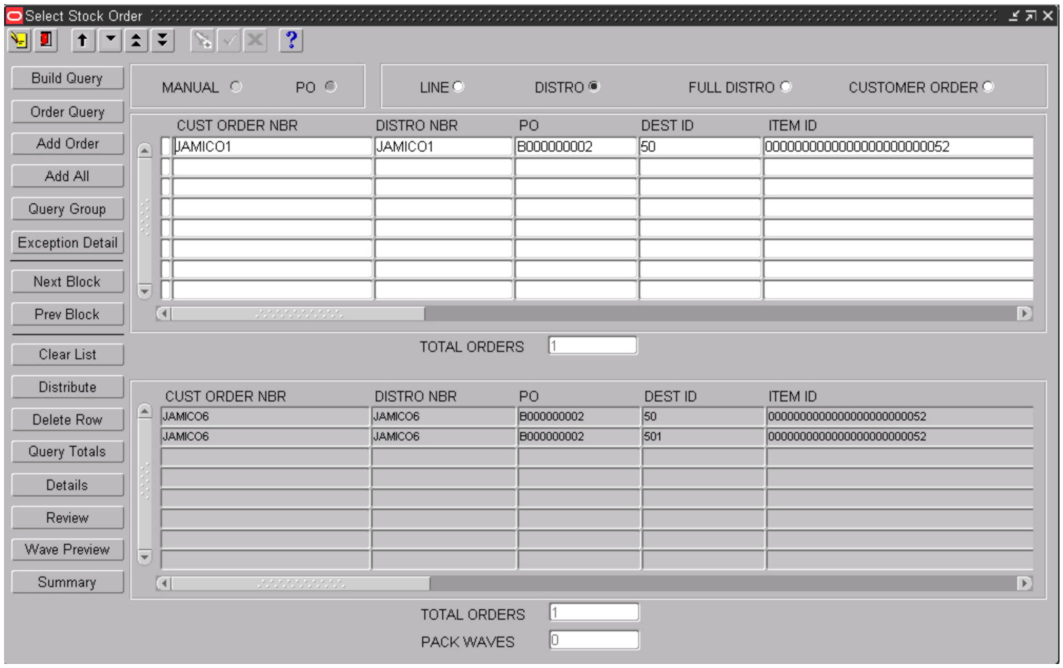
   b. In the Wave Nbr and Description fields, enter a number and description for the wave.
   c. In the Distribution Method field, select the appropriate method.
   d. In the Wave Type field, select the type of wave. The type may be PO or Manual.
   e. In the Group Qty field, enter the number of slots if slotted picking carts are used by the pickers.
   f. Click **Save** to save the changes and close the Create/Modify window. You can then select the new pick wave if desired.
3. Click **Process**.
4. When prompted to assign the stock orders to the wave, click **Yes**. The stock orders are assigned and you are returned to the Select Stock Order window.

## Exit the Select Stock Order Window

- Click the exit  button to close the window.

# Query Manual Stock Orders

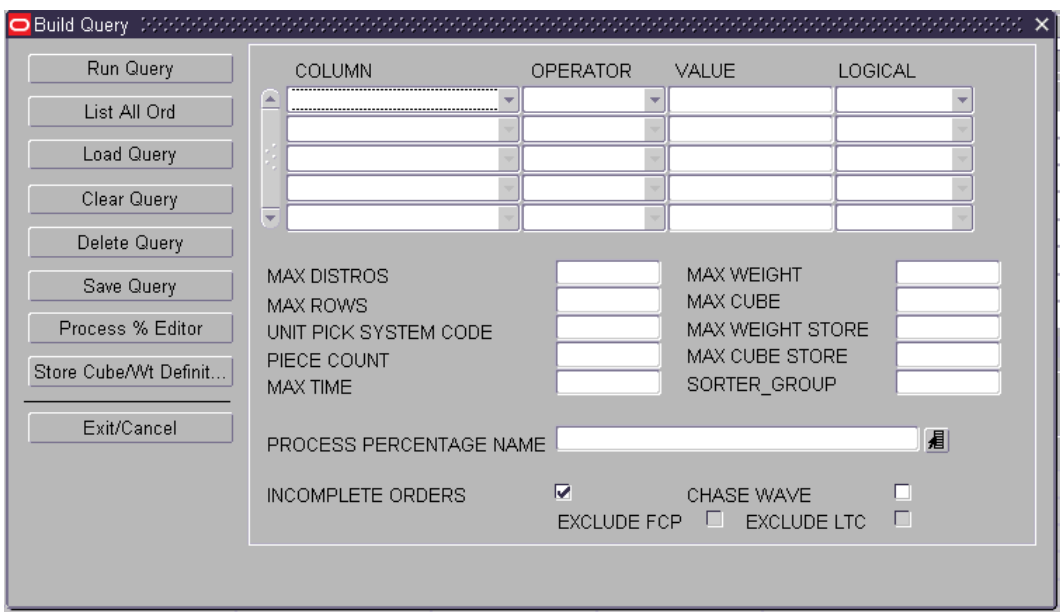
**Navigate:** From the main menu, select Distribution Planning > Select Stock Order. The Select Stock Order window opens.




**Select Stock Order Window**

## Run a Query

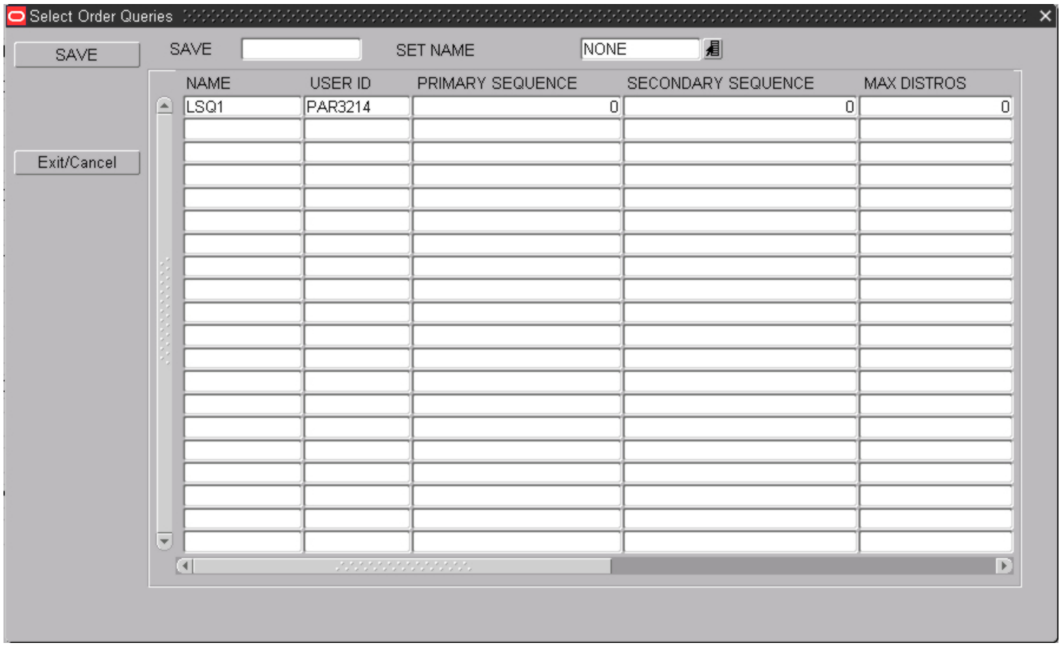
1. On the Select Stock Order window, click **Build Query**. The Build Query window opens.




**Build Query window**

2. If a query opens, click **Clear Query**.

3. To load a query:
   a. Click **Load Query**. The Select Order Queries window opens.




**Select Order Queries Window**

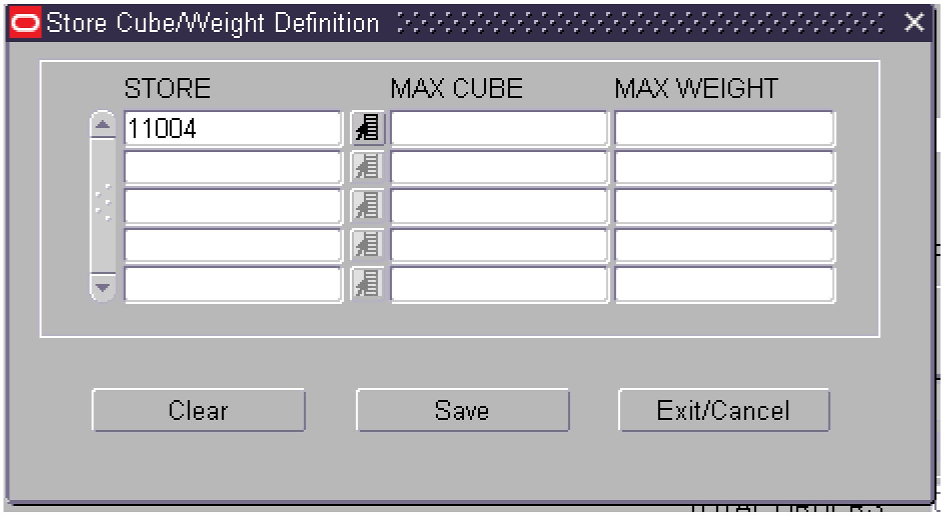
   b. Select the query that you want to use.
   c. Click **Load Query**. The query opens on the Build Query window.
4. Click **Run Query**. The query is run and the results appear on the Query Results block of the Select Stock Order window.

## Build a Query

1. On the Select Stock Order window, click **Build Query**. The Build Query window opens.
2. In the Column field, select a limiting element.
3. In the Operator field, select a relational operator.
4. In the Value field, enter the value of the element selected in the Column field.
5. In the Logical field, enter the logical operator used to join two or more conditions.
6. Enter additional conditions as necessary.
7. After entering all the conditional statements, enter any chute criteria in the lower half of the window as necessary.
8. To include incomplete orders in the results, select the Incomplete Orders check box.
9. To save a query:
   a. Click **Save Query**. The Select Order Queries window opens.
   b. In the Save field, enter a name for the query.
   c. If the query is to be saved as part of a query set, select the query set in the Set Name field, or click the LOV  button and select the query set.
   d. Click **Save** to save the query and close the Select Order Queries window.
10. On the Build Query window, click **Run Query** to run the query or **Exit/Cancel** to close the Build Query window.

## Enter Store Cube/Weight Definition

1. On the Select Stock Order window, click **Build Query**.
2. On the Build Query window, click **Store Cube/Weight Definition**. The Store Cube/Weight Definition window opens.




**Store Cube/Weight Definition Window**

3. Select a store and enter the weights.
4. Click **Save**.
5. Click **Exit** to close the Store Cube/Weight Definition window.

## Delete a Query

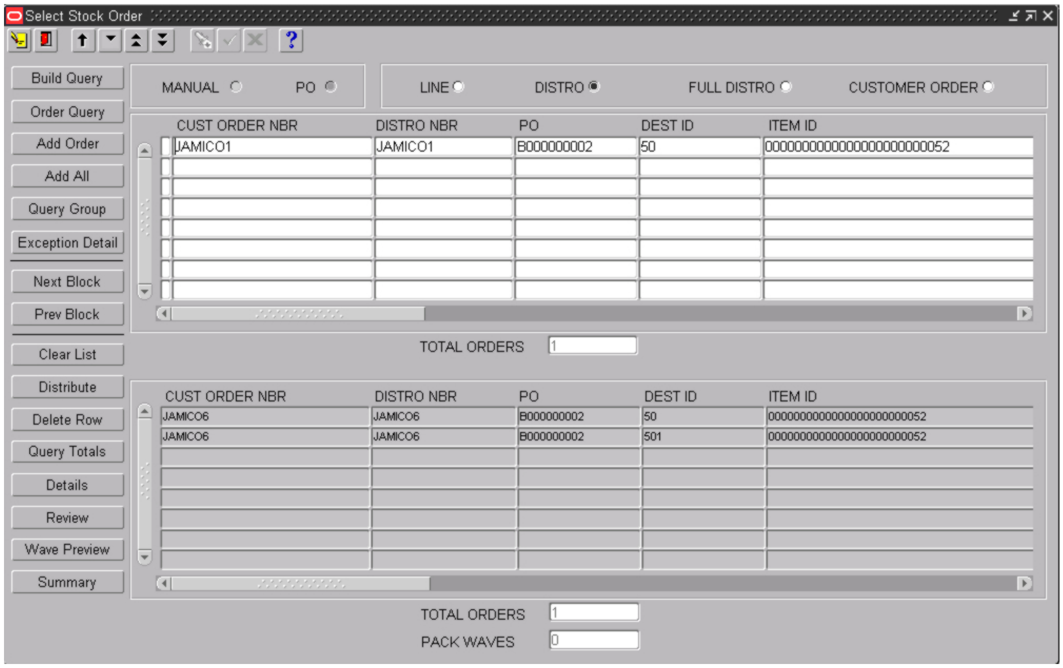
1. On the Select Stock Order window, click **Build Query**. The Build Query window opens.
2. Click **Delete Query**. The Select Order Queries window opens.
3. Select the query that you want to delete.
4. Click **Delete Query**.
5. When prompted to delete the record, click **Yes**. The query is deleted and you are returned to the Build Query window.
6. Click **Exit/Cancel** to close the Build Query window.

## Exit the Select Stock Order Window

- Click the exit  button to close the window.

# Run Query Sets on Manual Stock Orders

**Navigate:** From the main menu, select Distribution Planning > Select Stock Order. The Select Stock Order window opens.




**Select Stock Order Window**

## Run a Set of Queries

1. On the Select Stock Order window, click **Query Group**. The Query Group window opens.

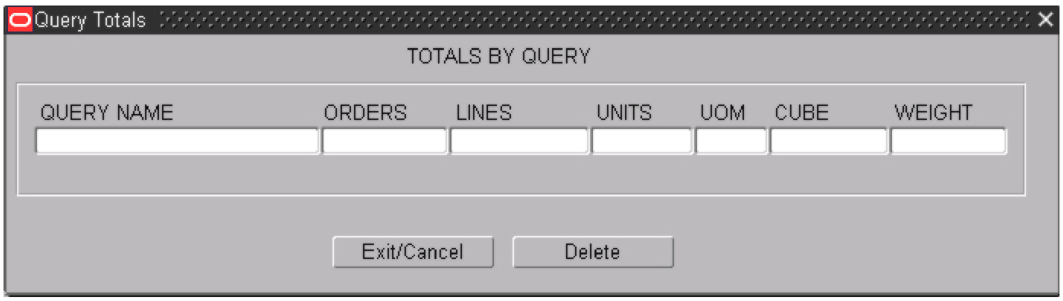

**Query Group Window**

2. In the Set Name field, enter the name of a query set, or click the LOV  button and select the query set.

3. Enter any chute constraints as necessary:
   - Max Distros: Limits the number of distros returned.
   - Max Pack Waves: Limits the number of pack waves generated. It does not exceed the number of pack waves designated for the sorter group.
   - Fill Sorter Capacity: Limits the number of orders to what is needed in order to fill the sorter.
4. Click **Run Set**. The set of queries is run, chute logic is applied, and the results appear on the Query Results block of the Select Stock Order window.

## Adjust the Results

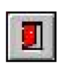
1. On the Select Stock Order window, click **Query Totals**. The Query Totals window opens.




**Query Totals Window**

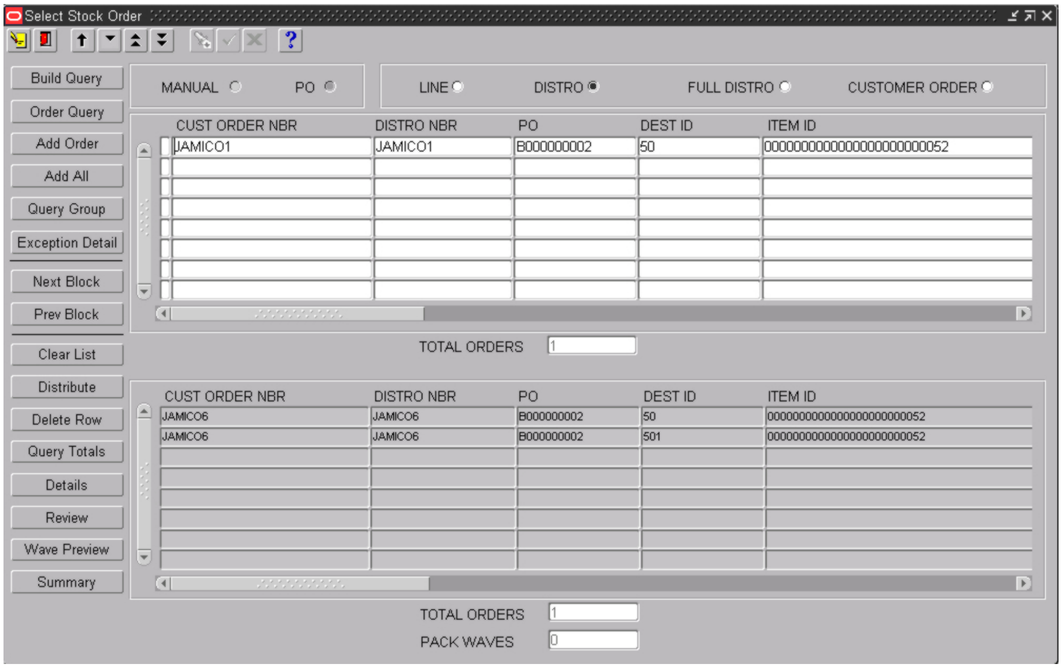
2. To remove the order lines returned by a specific query in the query set, select the query and click **Delete**. The lines are removed from the Distribute Orders block on the Select Stock Order window.

## Exit the Select Stock Order Window

- Click the exit  button to close the window.

# Review Manual Stock Orders

**Navigate:** From the main menu, select Distribution Planning > Select Stock Order. The Select Stock Order window opens.



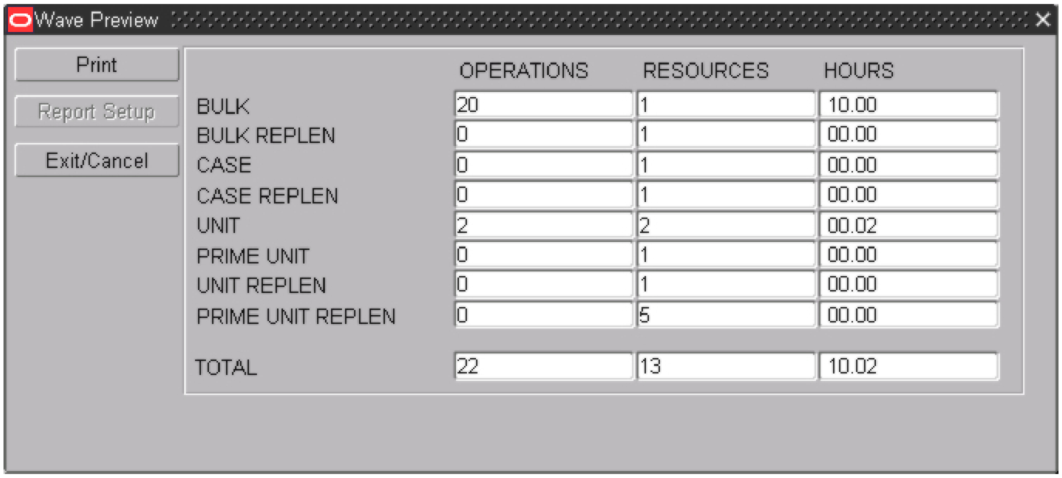

**Select Stock Order Window**

## View Details by Distro

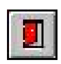
1. On the Select Stock Order window, select the stock order in the Distribute Orders block.
2. Click **Details**. The details appear in the Details for Distro window.
3. Click **Exit/Cancel** to close the Details for Distro window.

## View Planned Waves by Day

1. On the Select Stock Order window, click **Review**. The waves for the current date appear in the Manual Wave Review window.

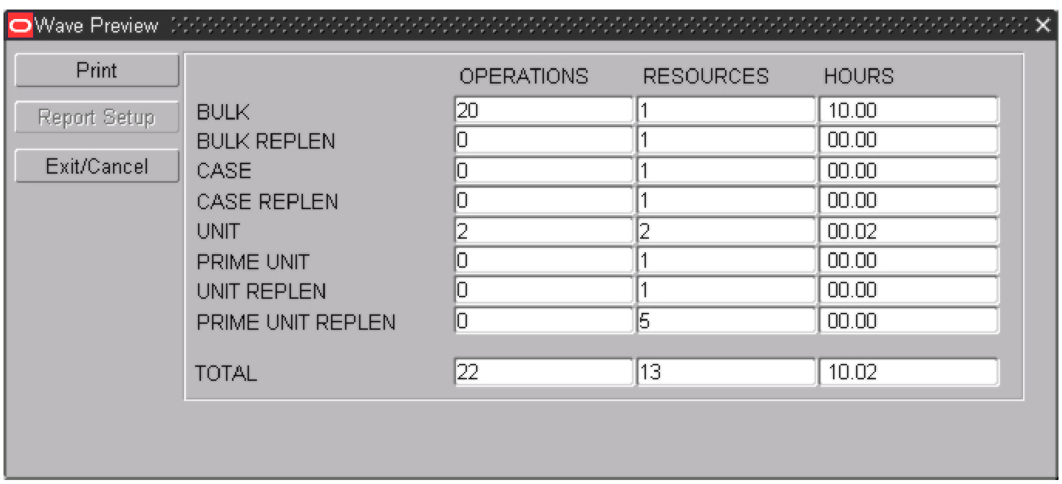



**Manual Wave Review Window**

2. Click the exit  button to close the Manual Wave Review window.

## Generate the Wave Preview Report

1. On the Select Stock Order window, click **Wave Preview**. The wave details appear in the Wave Preview window.

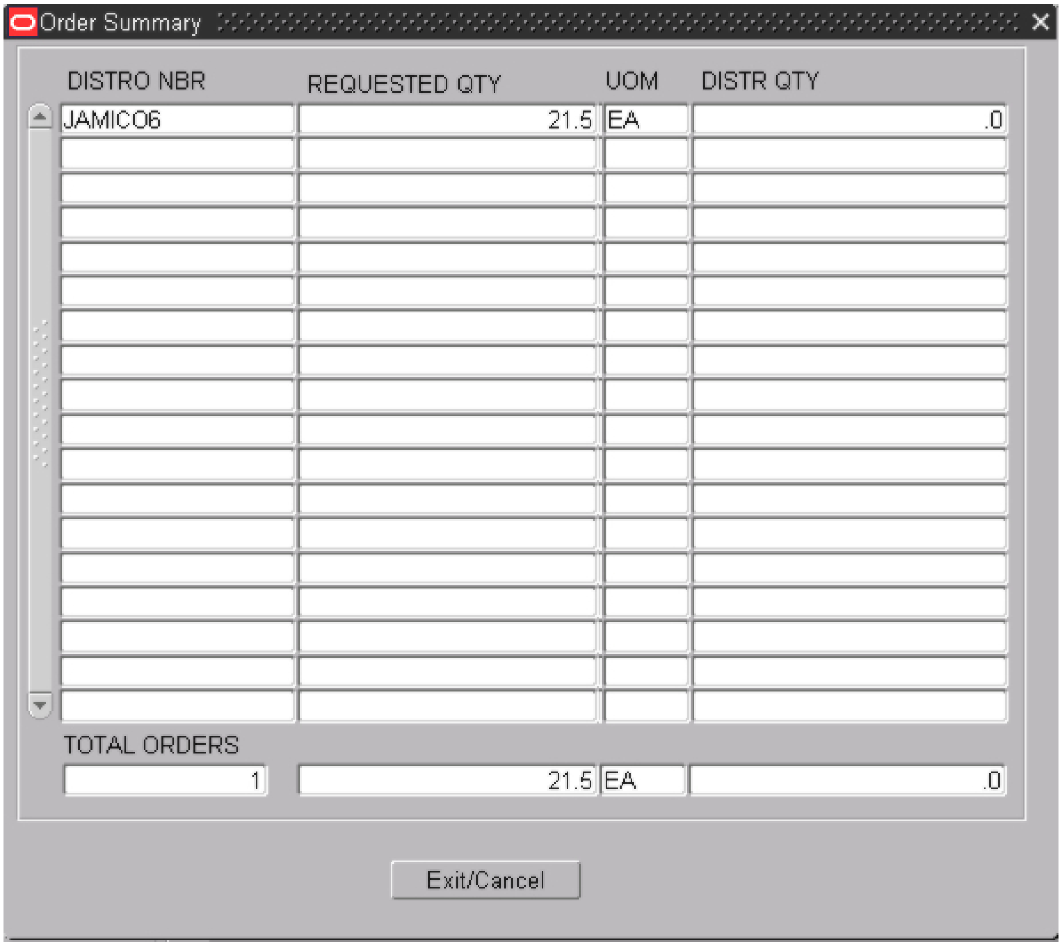



**Wave Preview Window**

2. Click **Print**. The Wave Preview report is sent to the default destination.

## View a Distribution Summary

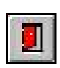
1. On the Select Stock Order window, click **Summary**. The details appear in the Order Summary window.




**Order Summary Window**

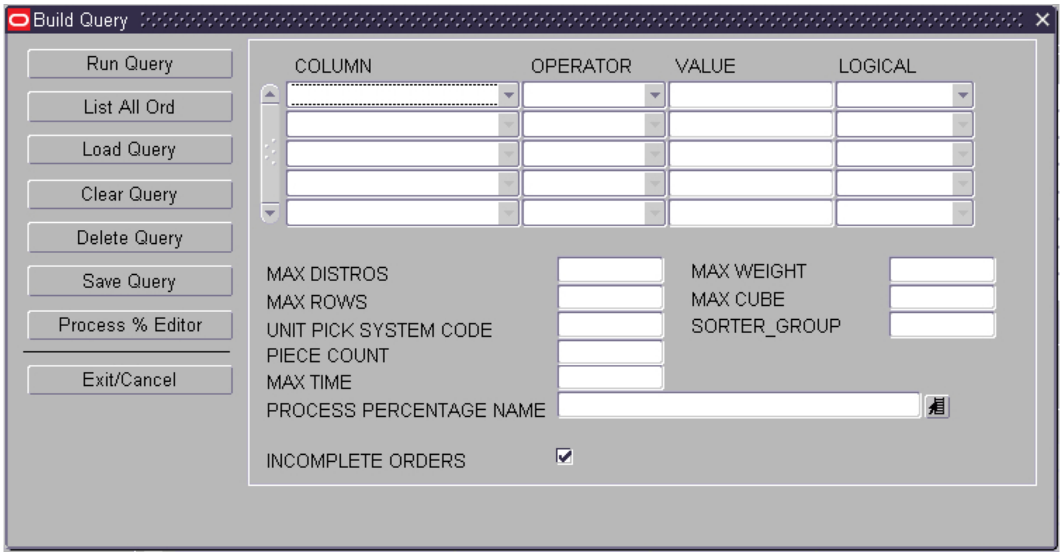
2. Click **Exit/Cancel** to close the Order Summary window.

## Exit the Select Stock Order Window

- Click the exit  button to close the window.

# Maintain Stock Order Queries

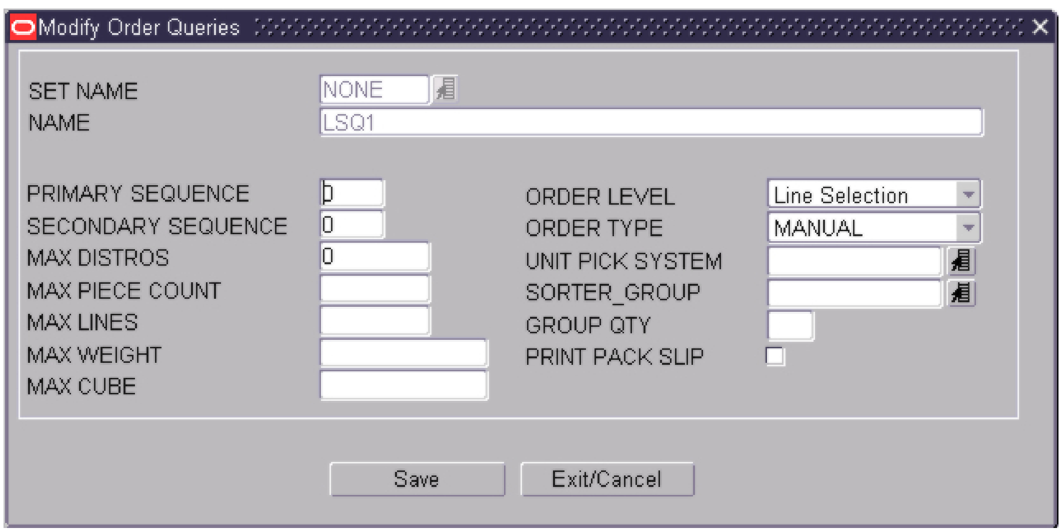
**Navigate:** From the main menu, select Distribution Planning > Order Query Editor. The current queries appear in the Order Queries Editor window.




**Order Queries Editor Window**

## Edit a Query

1. On the Order Queries Editor window, double-click the query that you want to edit. The Modify Order Queries window opens.

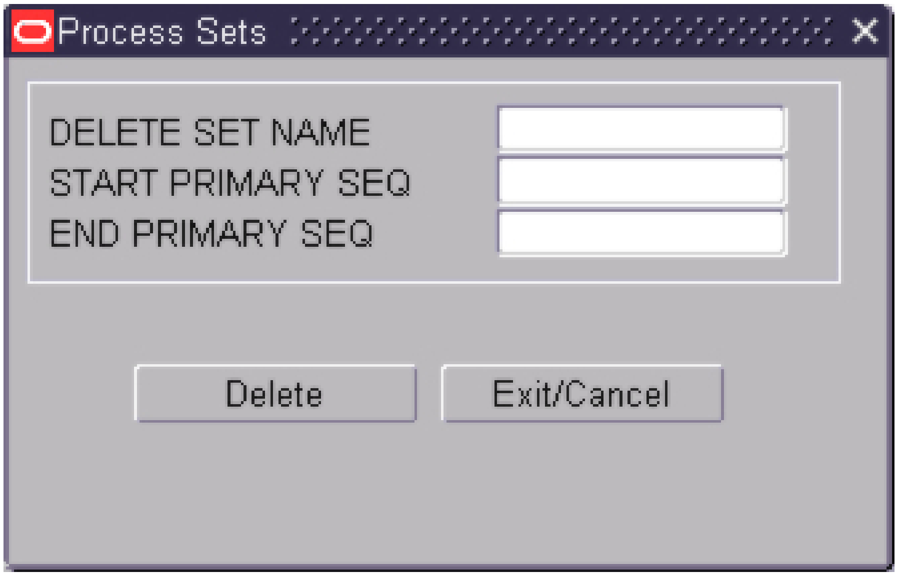



**Modify Order Queries Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Modify Order Queries window.

## Copy a Query Set

1. On the Order Queries Editor window, click **Copy Set**. The Process Sets window opens.




**Process Sets Window**

2. In the New Set Name field, enter the name of the new set.
3. In the From Set Name field, enter the name of the set to be copied.
4. In the Start Primary Seq and End Primary Seq fields, enter the first and last primary sequence numbers that you want to include in the range of queries.
5. Click **Copy** to save the changes and close the window. Any queries from the selected set that have primary sequence numbers within the selected range are copied to the new set.

## Delete a Query

1. On the Order Queries Editor window, select the query that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Delete a Query Set

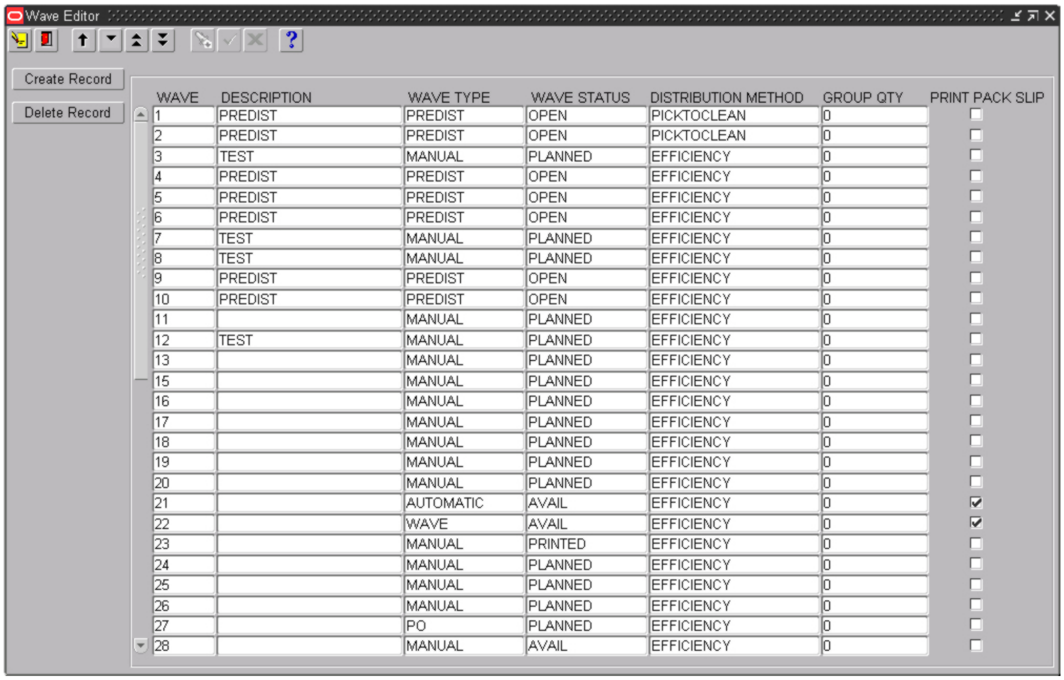
1. On the Order Queries Editor window, click **Delete Set**. The Process Sets window opens.
2. In the Delete Set Name field, enter the name of the set that you want to delete.
3. To delete only a range of queries from the selected set, enter the start and end primary sequence numbers in the appropriate fields.
4. Click **Delete**. The queries within the range of sequence number are deleted. If no sequence numbers were entered, the entire query set is deleted.

## Exit the Order Queries Editor Window

- Click the exit  button to close the window.

# Maintain Waves

**Navigate:** From the main menu, select Distribution Planning > Wave Editor. The current waves appear in the Wave Editor window.



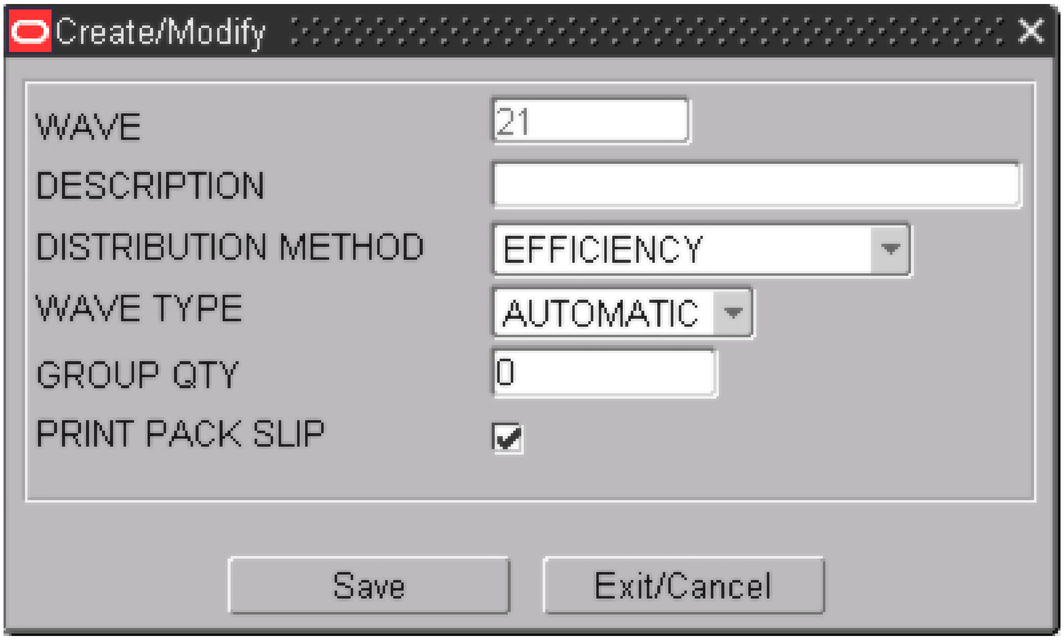

| WAVE | DESCRIPTION | WAVE TYPE | WAVE STATUS | DISTRIBUTION METHOD | GROUP QTY | PRINT PACK SLIP |
|---|---|---|---|---|---|---|
| 1 | PREDIST | PREDIST | OPEN | PICKTOCLEAN | 0 | ☐ |
| 2 | PREDIST | PREDIST | OPEN | PICKTOCLEAN | 0 | ☐ |
| 3 | TEST | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 4 | PREDIST | PREDIST | OPEN | EFFICIENCY | 0 | ☐ |
| 5 | PREDIST | PREDIST | OPEN | EFFICIENCY | 0 | ☐ |
| 6 | PREDIST | PREDIST | OPEN | EFFICIENCY | 0 | ☐ |
| 7 | TEST | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 8 | TEST | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 9 | PREDIST | PREDIST | OPEN | EFFICIENCY | 0 | ☐ |
| 10 | PREDIST | PREDIST | OPEN | EFFICIENCY | 0 | ☐ |
| 11 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 12 | TEST | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 13 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 15 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 16 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 17 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 18 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 19 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 20 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 21 | | AUTOMATIC | AVAIL | EFFICIENCY | 0 | ☑ |
| 22 | | WAVE | AVAIL | EFFICIENCY | 0 | ☑ |
| 23 | | MANUAL | PRINTED | EFFICIENCY | 0 | ☐ |
| 24 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 25 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 26 | | MANUAL | PLANNED | EFFICIENCY | 0 | ☐ |
| 27 | | PO | PLANNED | EFFICIENCY | 0 | ☐ |
| 28 | | MANUAL | AVAIL | EFFICIENCY | 0 | ☐ |

**Wave Editor Window**

## Edit a Wave

**Note:** Only waves with a status of Available may be edited.

1. On the Wave Editor window, double-click the wave that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

## Add a Wave

1. On the Wave Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Wave field, enter a unique wave number.
3. In the Description field, enter a description for the wave.
4. In the Distribution Method field, select the appropriate method.
5. In the Wave Type field, select the type of wave.
6. In the Group Qty field, enter the number of containers to group in a wave.
7. To indicate that a packing slip should be printed when the wave labels are printed, select the Print Pack Slip check box.
8. Click **Save** to save the changes and close the Create/Modify window.

## Delete a Wave

**Note:** Only waves with a status of Available may be deleted.

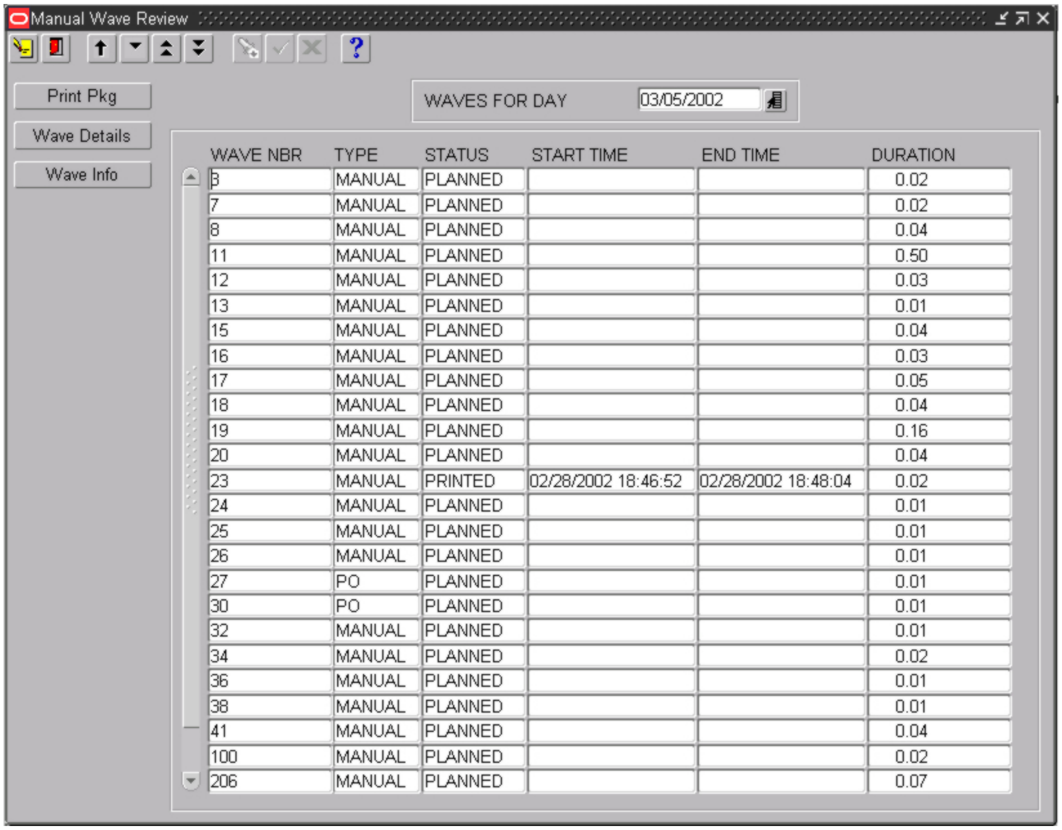
1. On the Wave Editor window, select the wave that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Exit the Wave Editor Window

- Click the exit button to close the window.

# Maintain Manual Waves

**Navigate:** From the main menu, select Distribution Planning > Manual Wave Review. The manual waves for the current date appear in the Manual Wave Review window.



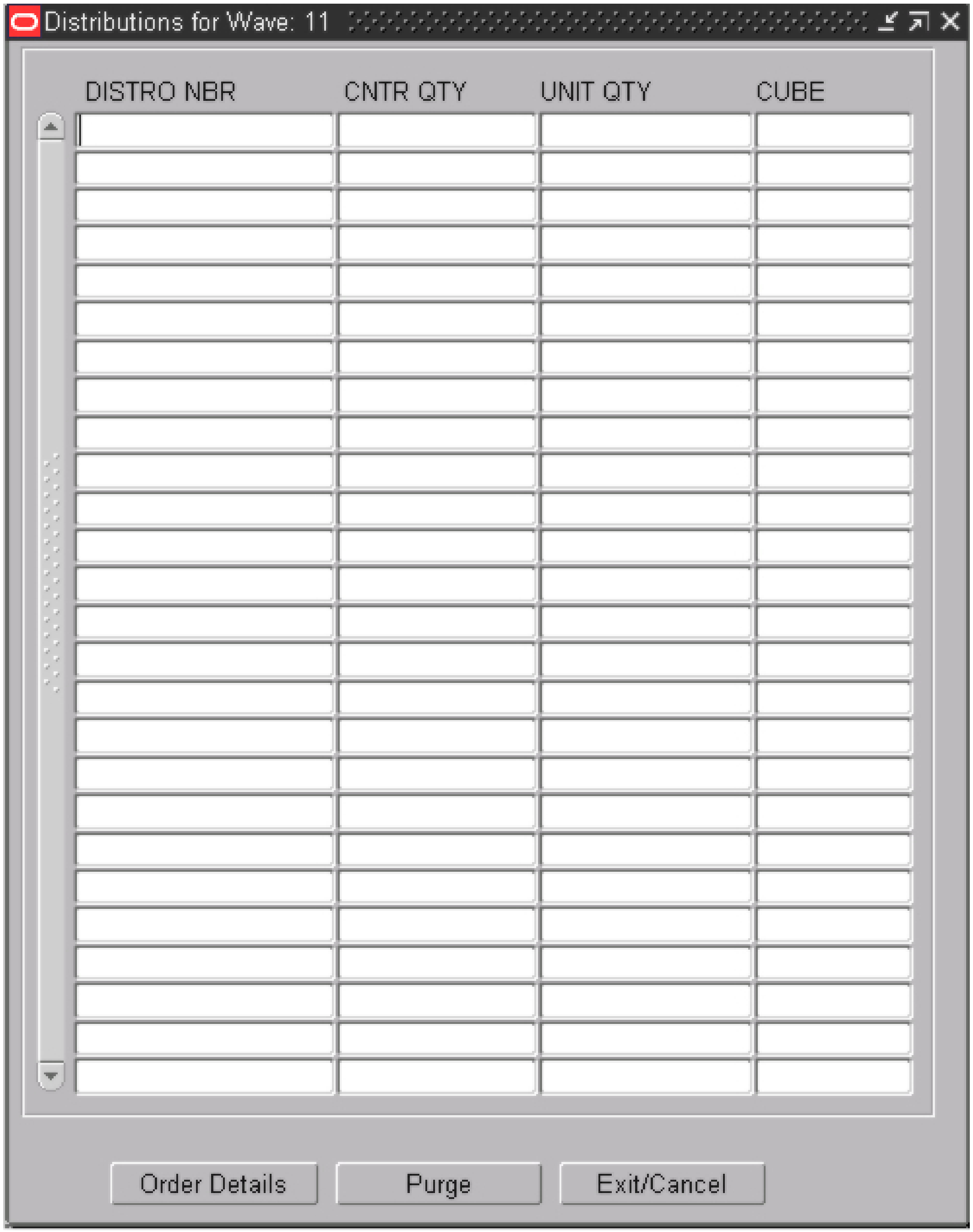

**Manual Wave Review Window**

## Display Manual Waves for Another Date

1. If any manual waves are currently displayed, click the clear button.
2. In the Waves for Day field, enter the date that you want to review, or click the calendar button and select the date. The manual waves for the selected date appear.

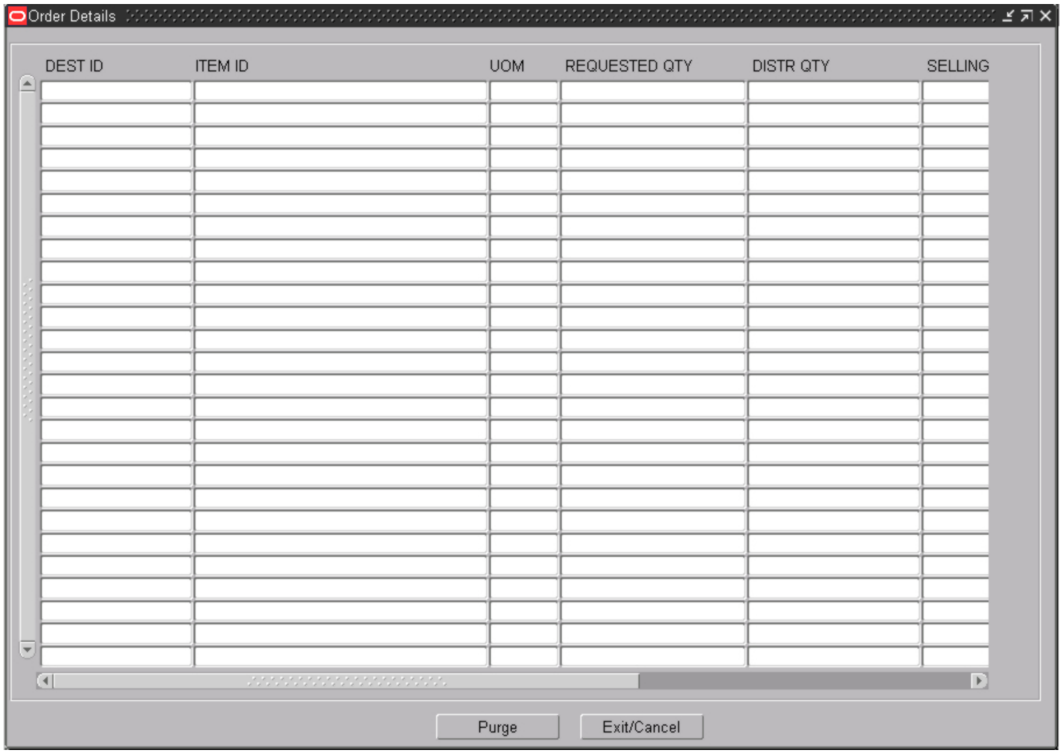
## View Details by Distro

1. On the Manual Wave Review window, select the manual wave that you want to view in detail.
2. Click **Wave Details**. The distros appear in the Distributions for Wave window.




**Distributions for Wave Window**

3. To view details by destination, select the distro that you want to view in detail.
4. Click **Order Details**. The destinations appear in the Order Details windows.




**Order Details Windows**

5. Click **Exit/Cancel** to close the Order Details window. Then click **Exit/Cancel** to close the Distributions for Wave window.

## Purge a Distro from a Manual Wave

> **Note:** When you purge a distro from a manual wave, the picks are deleted from the wave and the allocations are reset.

1. On the Manual Wave Review window, select the manual wave that you want to edit.
2. Click **Wave Details**. The distros appear in the Distributions for Wave window.
3. Select the distro that you want to purge.
4. Click **Purge**.

## Purge a Destination/Item from a Distro

> **Note:** When you purge a destination/item from a distro, the picks are deleted from the wave and the allocations are reset.

1. On the Manual Wave Review window, select the manual wave that you want to edit.
2. Click **Wave Details**. The distros appear in the Distributions for Wave window.
3. Select the distro that you want to edit.
4. Click **Order Details**. The Order Details window opens.
5. Select the destination/item that you want to purge.
6. Click **Purge**.

## Edit Resources and Hours for a Manual Wave

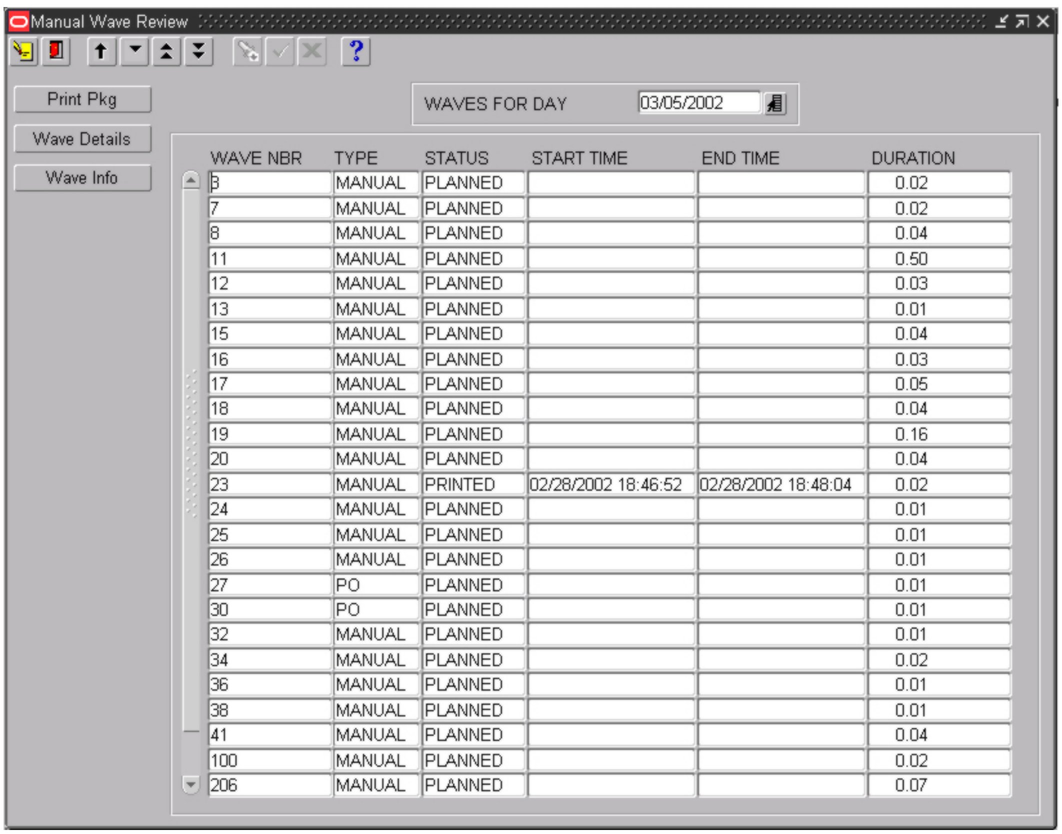
1. On the Manual Wave Review window, select the manual wave that you want to edit.
2. Click **Wave Info**. The projected operations appear in the Wave Information window.
3. Double-click a field. The Modify window opens.
4. Edit the resources and hours as necessary.
5. Click **Save** to save any changes and close the Modify window.
6. Click the exit button to close the Wave Information window.

## Exit the Manual Wave Review Window

- Click the exit button to close the window.

# Generate Pick Packages for Manual Waves

**Navigate:** From the main menu, select Distribution Planning > Manual Wave Review. The manual waves for the current date appear in the Manual Wave Review window.




| WAVE NBR | TYPE | STATUS | START TIME | END TIME | DURATION |
|---|---|---|---|---|---|
| 3 | MANUAL | PLANNED | | | 0.02 |
| 7 | MANUAL | PLANNED | | | 0.02 |
| 8 | MANUAL | PLANNED | | | 0.04 |
| 11 | MANUAL | PLANNED | | | 0.50 |
| 12 | MANUAL | PLANNED | | | 0.03 |
| 13 | MANUAL | PLANNED | | | 0.01 |
| 15 | MANUAL | PLANNED | | | 0.04 |
| 16 | MANUAL | PLANNED | | | 0.03 |
| 17 | MANUAL | PLANNED | | | 0.05 |
| 18 | MANUAL | PLANNED | | | 0.04 |
| 19 | MANUAL | PLANNED | | | 0.16 |
| 20 | MANUAL | PLANNED | | | 0.04 |
| 23 | MANUAL | PRINTED | 02/28/2002 18:46:52 | 02/28/2002 18:48:04 | 0.02 |
| 24 | MANUAL | PLANNED | | | 0.01 |
| 25 | MANUAL | PLANNED | | | 0.01 |
| 26 | MANUAL | PLANNED | | | 0.01 |
| 27 | PO | PLANNED | | | 0.01 |
| 30 | PO | PLANNED | | | 0.01 |
| 32 | MANUAL | PLANNED | | | 0.01 |
| 34 | MANUAL | PLANNED | | | 0.02 |
| 36 | MANUAL | PLANNED | | | 0.01 |
| 38 | MANUAL | PLANNED | | | 0.01 |
| 41 | MANUAL | PLANNED | | | 0.04 |
| 100 | MANUAL | PLANNED | | | 0.02 |
| 206 | MANUAL | PLANNED | | | 0.07 |

**Manual Wave Review Window**

## Display Manual Waves for Another Date

1. If any manual waves are currently displayed, click the clear button.
2. In the Waves for Day field, enter the date that you want to review, or click the calendar button and select the date. The manual waves for the selected date appear.

## Print a Pick Package

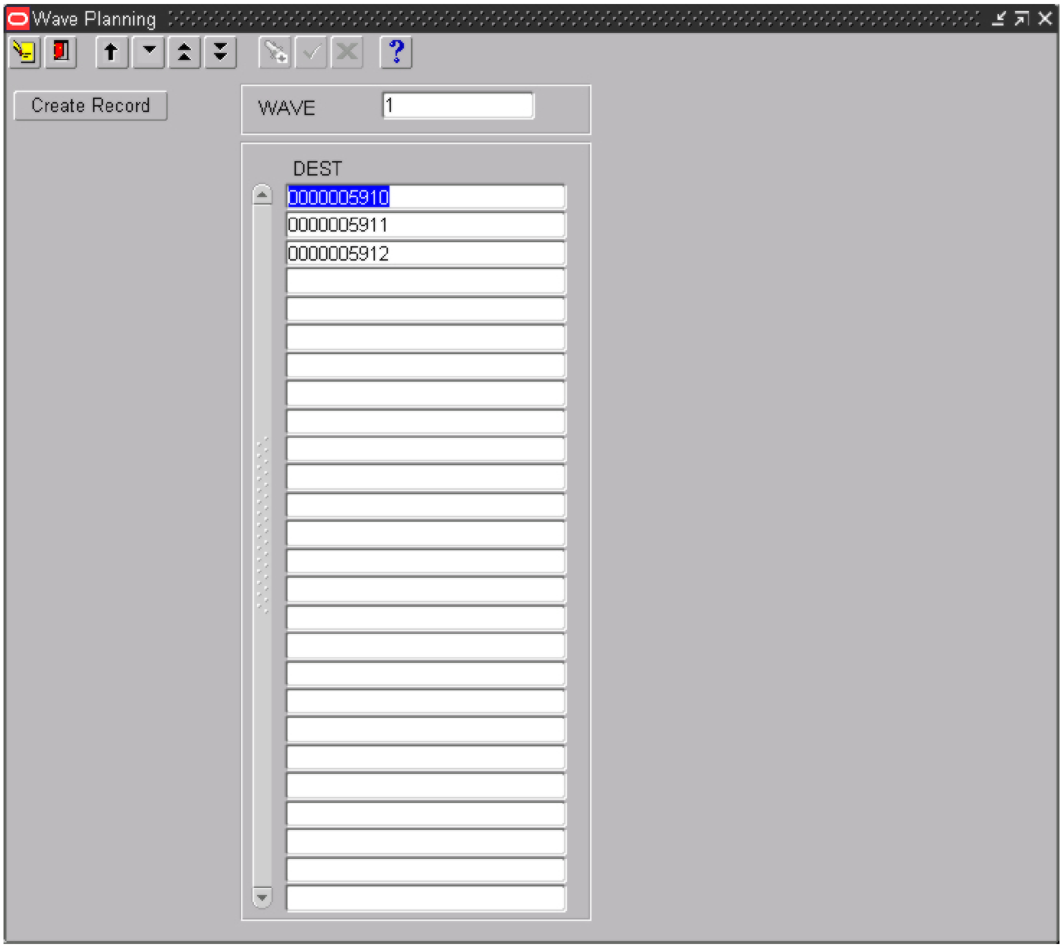
1. On the Manual Wave Review window, select the manual wave for which a pick package is needed.
2. Click **Print Pkg**.
3. When prompted to confirm the request, click **Yes**.

## Exit the Manual Wave Review Window

- Click the exit button to close the window.

# Maintain Wave Plans

**Navigate:** From the main menu, select Distribution Planning > Wave Planning. The Wave Planning window opens.



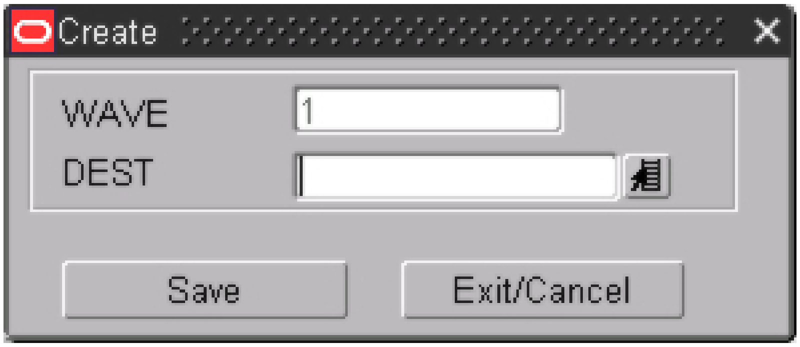

**Wave Planning Window**

## Display a Wave Plan

1. If a wave is currently displayed, click the clear button.
2. Click the enter query button.
3. In the Wave query field, enter the wave number, or click the LOV button and select the wave.
4. Click the execute query button. The destinations for the selected wave are displayed.

## Add a Destination to a Wave

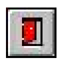
1. On the Wave Planning window, click **Create Record**. The Create window opens.




**Create Window**

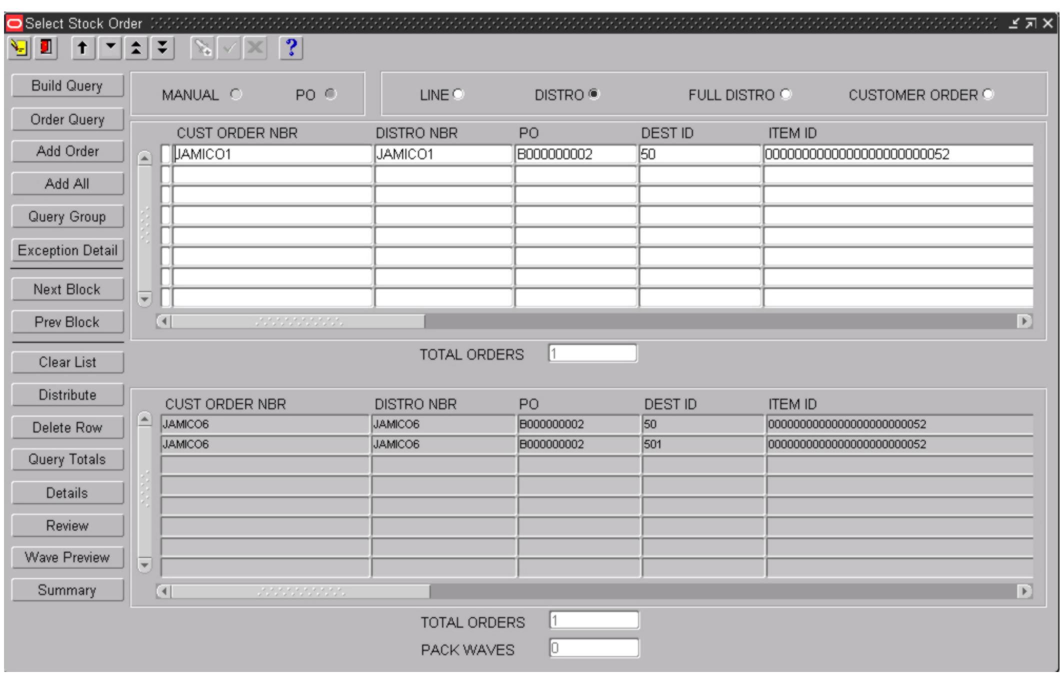
2. In the Dest field, enter the ID of the destination, or click the LOV  button and select the destination.
3. Click **Save** to save the changes and close the Create window.

## Exit the Wave Planning Window

- Click the exit  button to close the window.

# Estimate the Time to Complete a Wave

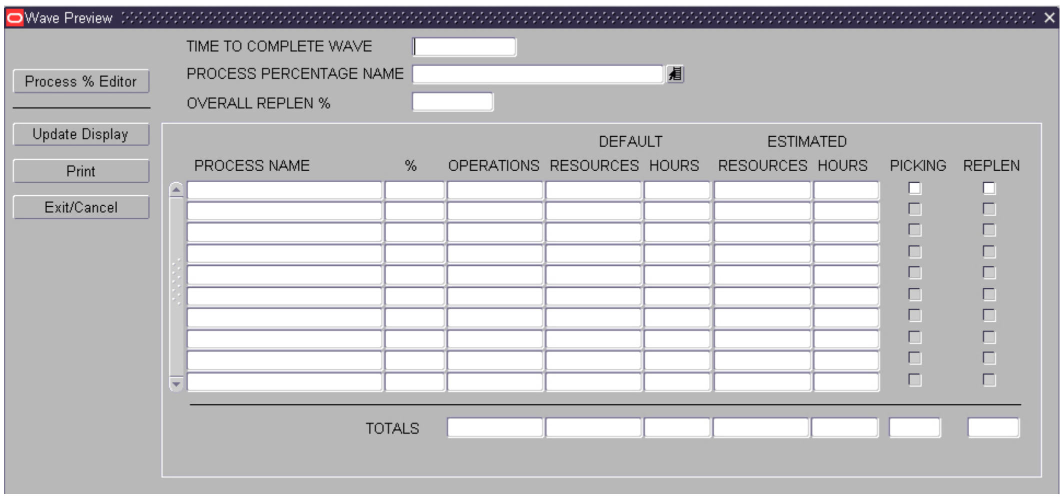
**Navigate:** From the main menu, select Distribution Planning > Select Stock Order. The Select Stock Order window opens.




**Select Stock Order Window**

**Note:** There are two blocks on this window. They are referred to as the Query Results block and the Distribute Orders block.

1. Query manual stock orders.
2. In the Query Results block, select a stock order.
3. Click **Add Order**. The stock order opens in the Distribute Orders block.
4. In the Distribute Orders block, select a stock order.
5. Click **Wave Preview**. The Wave Preview window opens.




**Wave Preview Window**

6. In the Time to Complete Wave field, enter the number of hours needed to pick the wave.
7. In the Process Percentage Name field, click the LOV  button and select the process percentage you want to use.
8. In the Overall Replen % field, enter the percentage of the replenishment process you want to pick.
9. Click **Update Display**. The time to complete wave a estimate opens.

## Print the Time to Complete Wave Estimate

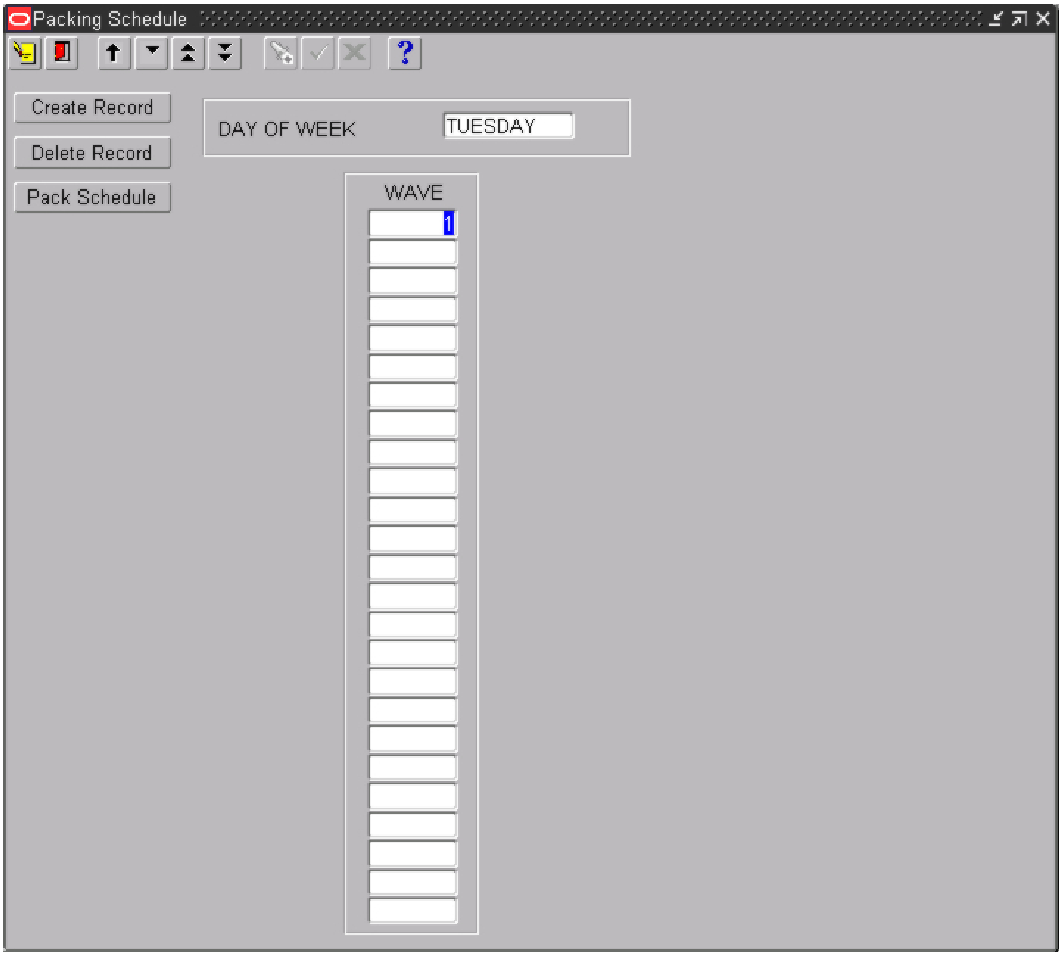
- Click the print  button. The report is sent to the default destination.

## Exit the Windows

- Click the exit  button to close the windows.

# Maintain Packing Schedules

**Navigate:** From the main menu, select Distribution Planning > Packing Schedule Setup. The Packing Schedule window opens.



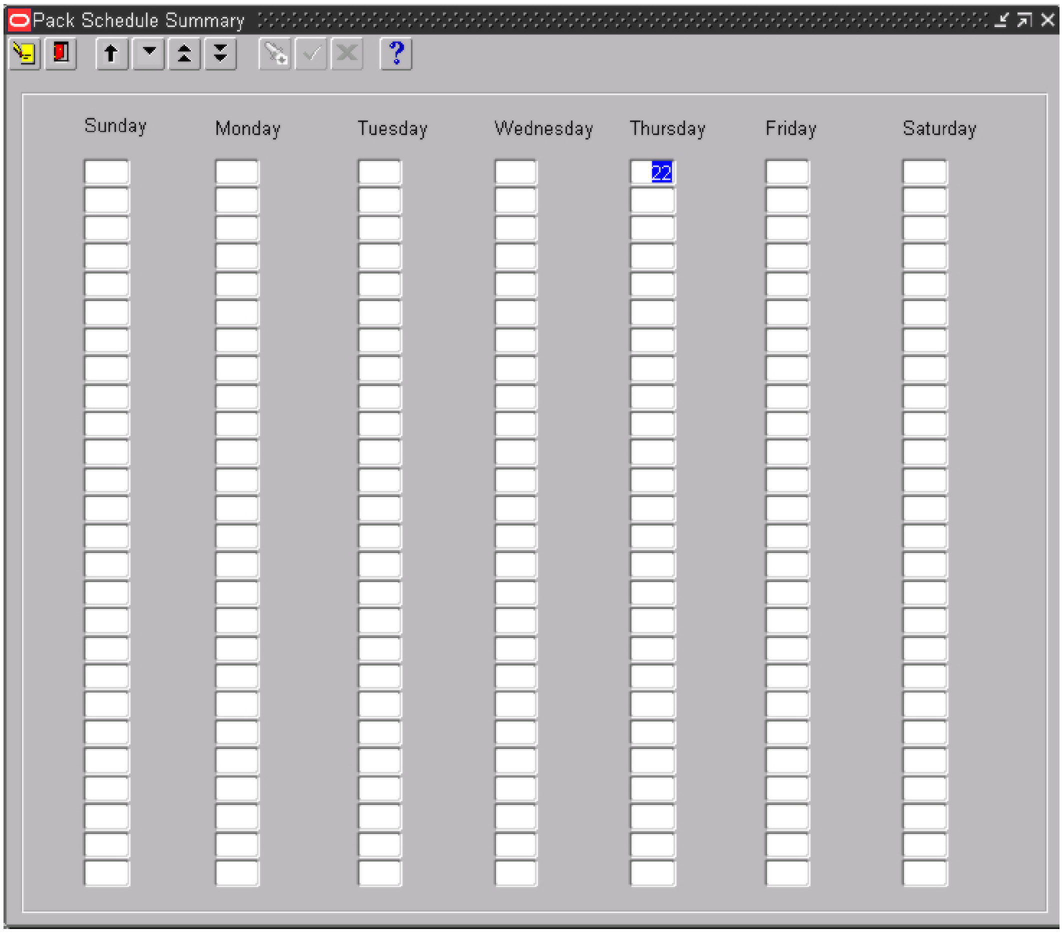

**Packing Schedule Window**

## Display the Packing Schedule for a Day of the Week

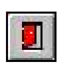
1. If a packing schedule is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Day of Week query field, enter the name of the day, or click the LOV  button and select the day.
4. Click the execute  query button. The waves associated with the selected day appear.

## View the Packing Schedules for the Week

1. On the Packing Schedule window, click **Pack Schedule**. The packing schedules for each day of the week appear on the Pack Schedule Summary window.




**Pack Schedule Summary Window**

2. Click the exit  button to close the Pack Schedule Summary window.

## Add a Wave to a Packing Schedule

1. On the Packing Schedule window, click **Create Record**. The Create window opens.

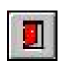

**Create Window**

2. Enter the wave number to be added to the schedule.
3. Click **Save** to save the changes and close the Create window.

## Delete a Wave from a Packing Schedule

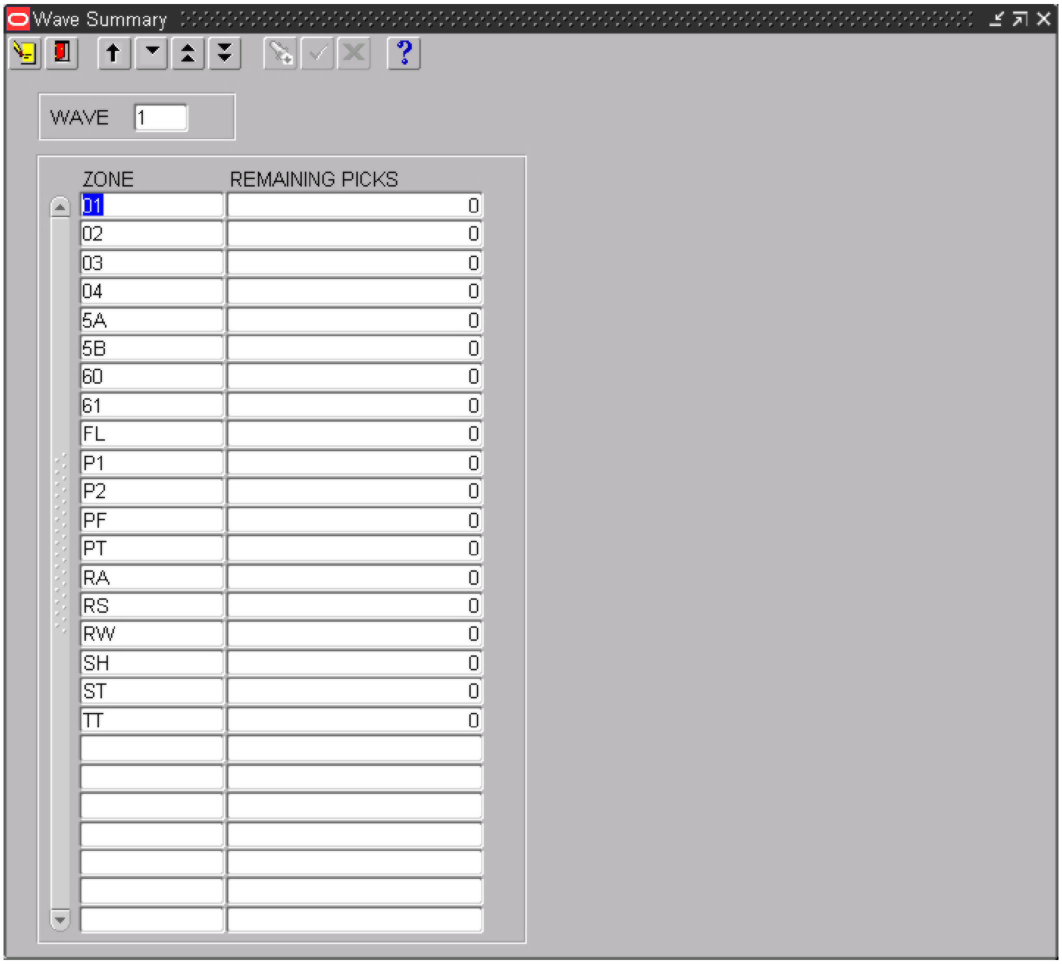
1. On the Packing Schedule window, select the wave that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Exit the Packing Schedule Window

- Click the exit  button to close the window.

# View Remaining Picks by Wave

**Navigate:** From the main menu, select Distribution Planning > Wave Summary. The Wave Summary window opens.




**Wave Summary Window**

## Display the Remaining Picks

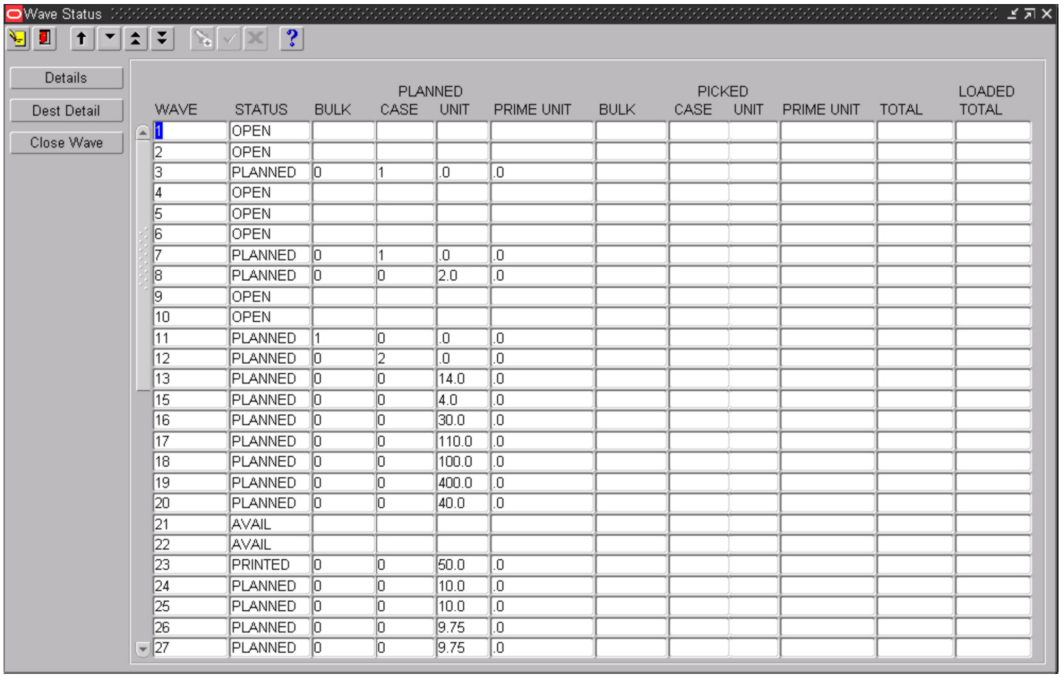
1. If a wave is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Wave query field, enter the name of the wave number, or click the LOV  button and select the wave number.
4. Click the execute  query button. The remaining picks for the selected wave are displayed by zone.

## Exit the Wave Summary Window

- Click the exit  button to close the window.

# View Wave Statuses

**Navigate:** From the main menu, select Distribution Planning > Wave Status. The current waves appear in the Wave Status window.

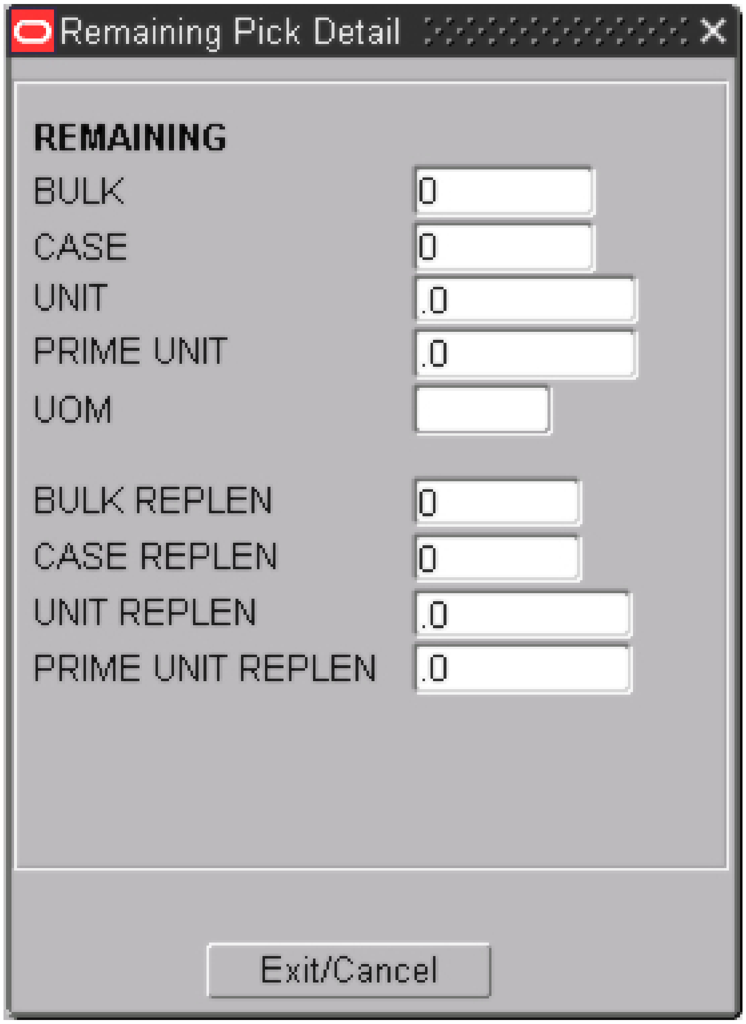



| WAVE | STATUS | PLANNED BULK | PLANNED CASE | PLANNED UNIT | PLANNED PRIME UNIT | PICKED BULK | PICKED CASE | PICKED UNIT | PICKED PRIME UNIT | TOTAL | LOADED TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | OPEN | | | | | | | | | | |
| 2 | OPEN | | | | | | | | | | |
| 3 | PLANNED | 0 | 1 | .0 | .0 | | | | | | |
| 4 | OPEN | | | | | | | | | | |
| 5 | OPEN | | | | | | | | | | |
| 6 | OPEN | | | | | | | | | | |
| 7 | PLANNED | 0 | 1 | .0 | .0 | | | | | | |
| 8 | PLANNED | 0 | 0 | 2.0 | .0 | | | | | | |
| 9 | OPEN | | | | | | | | | | |
| 10 | OPEN | | | | | | | | | | |
| 11 | PLANNED | 1 | 0 | .0 | .0 | | | | | | |
| 12 | PLANNED | 0 | 2 | .0 | .0 | | | | | | |
| 13 | PLANNED | 0 | 0 | 14.0 | .0 | | | | | | |
| 15 | PLANNED | 0 | 0 | 4.0 | .0 | | | | | | |
| 16 | PLANNED | 0 | 0 | 30.0 | .0 | | | | | | |
| 17 | PLANNED | 0 | 0 | 110.0 | .0 | | | | | | |
| 18 | PLANNED | 0 | 0 | 100.0 | .0 | | | | | | |
| 19 | PLANNED | 0 | 0 | 400.0 | .0 | | | | | | |
| 20 | PLANNED | 0 | 0 | 40.0 | .0 | | | | | | |
| 21 | AVAIL | | | | | | | | | | |
| 22 | AVAIL | | | | | | | | | | |
| 23 | PRINTED | 0 | 0 | 50.0 | .0 | | | | | | |
| 24 | PLANNED | 0 | 0 | 10.0 | .0 | | | | | | |
| 25 | PLANNED | 0 | 0 | 10.0 | .0 | | | | | | |
| 26 | PLANNED | 0 | 0 | 9.75 | .0 | | | | | | |
| 27 | PLANNED | 0 | 0 | 9.75 | .0 | | | | | | |

**Wave Status Window**

## View Remaining Picks for a Wave

1. On the Wave Status window, select the wave that you want to view in detail.
2. Click **Details**. The remaining picks appear for the selected wave appear in the Remaining Pick Detail window.

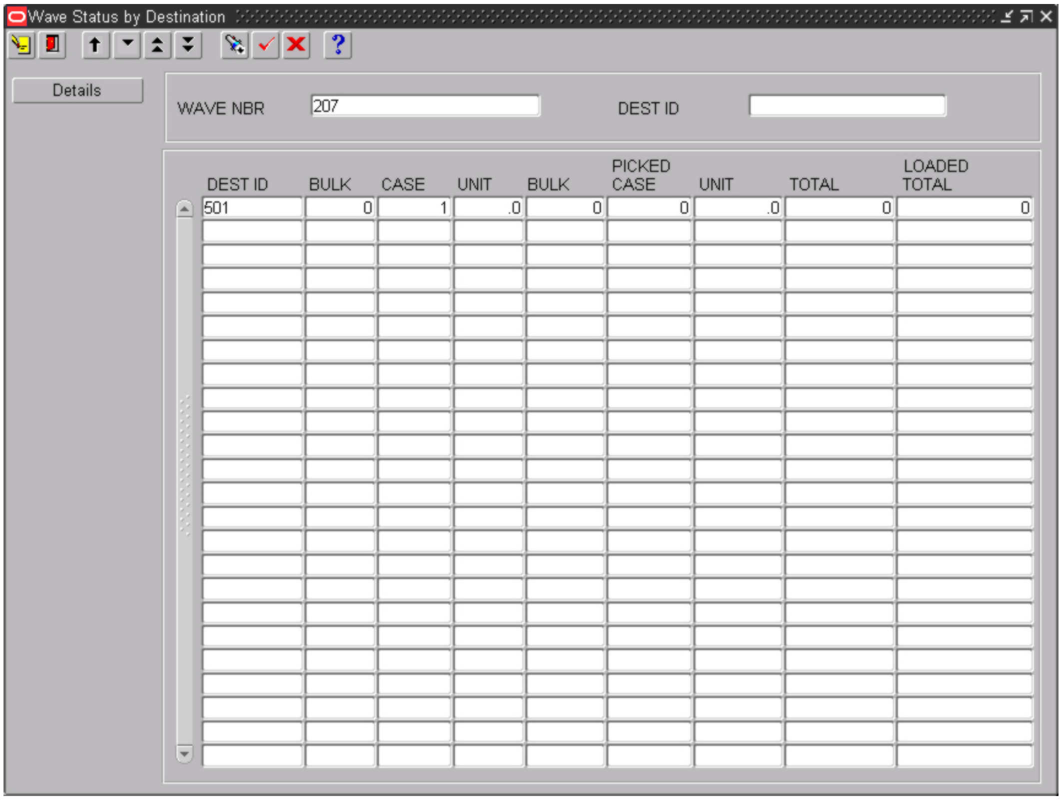



**Remaining Pick Detail Window**

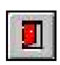
**3.** Click **Exit/Cancel** to close the Remaining Pick Detail window.

## View Wave Details by Destination

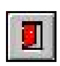
1. On the Wave Status window, select the wave that you want to view in detail.
2. Click **Dest Detail**. The details by destination for the selected wave appear in the Wave Status by Destination window.




**Wave Status by Destination Window**

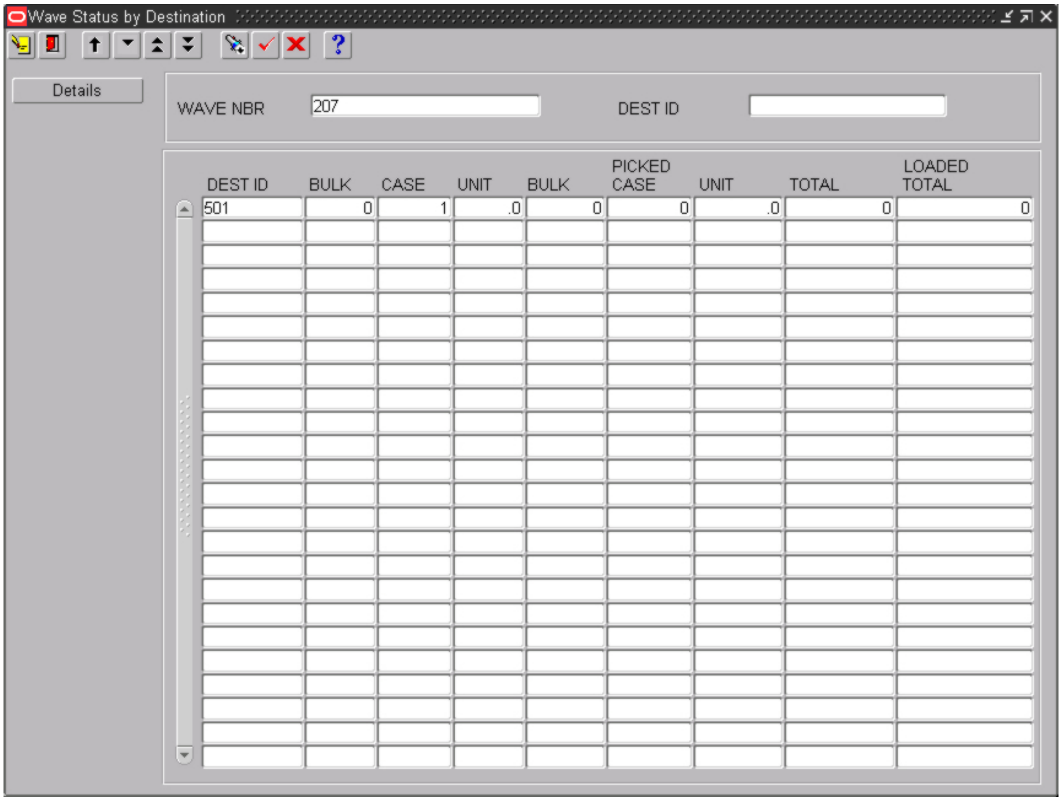
3. Click the exit  button to close the Wave Status by Destination window.

## Exit the Wave Status Window

- Click the exit  button to close the window.

# View Wave Statuses by Destination

**Navigate:** From the main menu, select Distribution Planning > Wave Status by Destination. The Wave Status by Destination window opens.




**Wave Status by Destination Window**

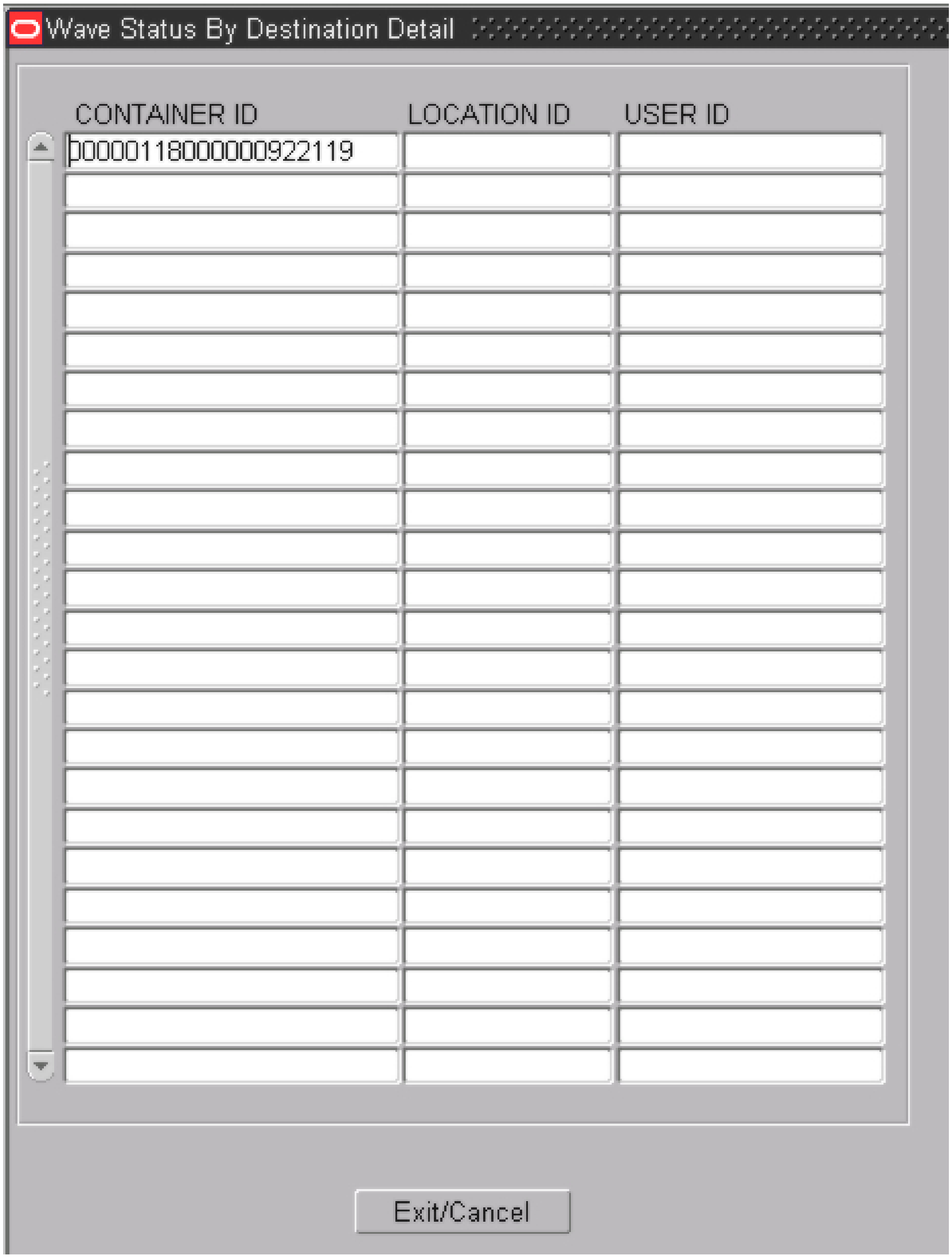
> **Note:** You can also access this window from the Wave Status window.

## Display Destination Details by Wave

1. If a wave is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Wave Nbr query field, enter a wave number, or click the LOV  button and select the wave.
4. Click the execute query  button. The destination details for the selected wave appear.

## View Container Details for a Destination

1. On the Wave Status by Destination window, select the destination that you want to view in detail.
2. Click **Details**. The container details appear in the Wave Status by Destination Detail window.




**Wave Status by Destination Detail Window**

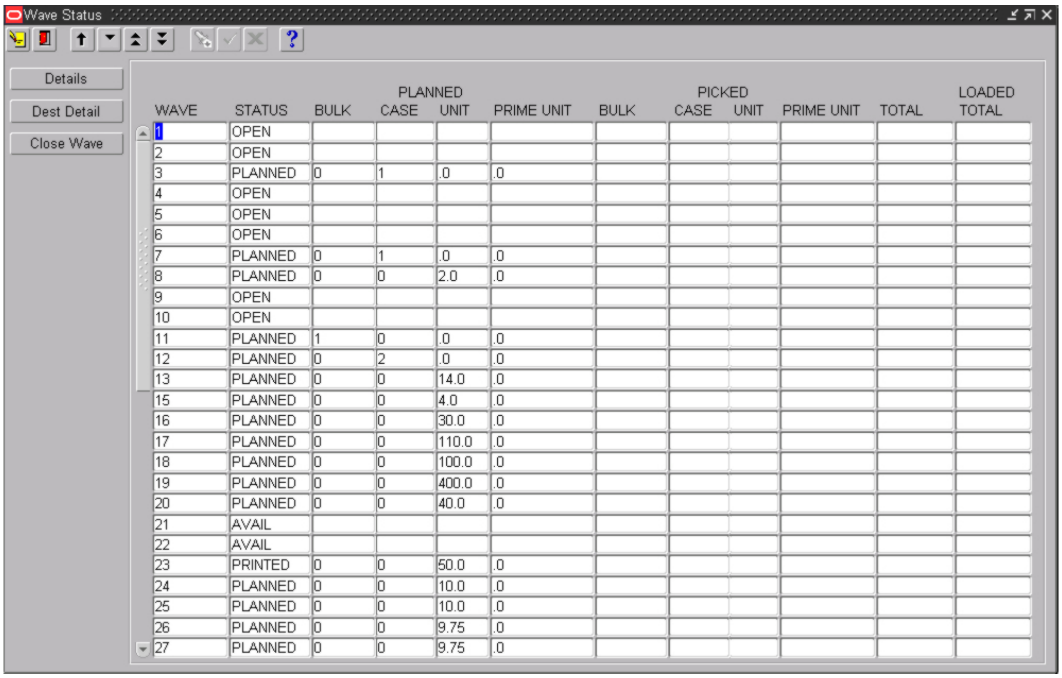
3. Click the **Exit/Cancel** button to close the Wave Status by Destination Detail window.

### Exit the Wave Status by Destination Window

- Click the exit button to close the window.

## Close Waves

**Navigate:** From the main menu, select Distribution Planning > Wave Status. The current waves appear in the Wave Status window.




| WAVE | STATUS | PLANNED BULK | PLANNED CASE | PLANNED UNIT | PLANNED PRIME UNIT | PICKED BULK | PICKED CASE | PICKED UNIT | PICKED PRIME UNIT | PICKED TOTAL | LOADED TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | OPEN | | | | | | | | | | |
| 2 | OPEN | | | | | | | | | | |
| 3 | PLANNED | 0 | 1 | .0 | .0 | | | | | | |
| 4 | OPEN | | | | | | | | | | |
| 5 | OPEN | | | | | | | | | | |
| 6 | OPEN | | | | | | | | | | |
| 7 | PLANNED | 0 | 1 | .0 | .0 | | | | | | |
| 8 | PLANNED | 0 | 0 | 2.0 | .0 | | | | | | |
| 9 | OPEN | | | | | | | | | | |
| 10 | OPEN | | | | | | | | | | |
| 11 | PLANNED | 1 | 0 | .0 | .0 | | | | | | |
| 12 | PLANNED | 0 | 2 | .0 | .0 | | | | | | |
| 13 | PLANNED | 0 | 0 | 14.0 | .0 | | | | | | |
| 15 | PLANNED | 0 | 0 | 4.0 | .0 | | | | | | |
| 16 | PLANNED | 0 | 0 | 30.0 | .0 | | | | | | |
| 17 | PLANNED | 0 | 0 | 110.0 | .0 | | | | | | |
| 18 | PLANNED | 0 | 0 | 100.0 | .0 | | | | | | |
| 19 | PLANNED | 0 | 0 | 400.0 | .0 | | | | | | |
| 20 | PLANNED | 0 | 0 | 40.0 | .0 | | | | | | |
| 21 | AVAIL | | | | | | | | | | |
| 22 | AVAIL | | | | | | | | | | |
| 23 | PRINTED | 0 | 0 | 50.0 | .0 | | | | | | |
| 24 | PLANNED | 0 | 0 | 10.0 | .0 | | | | | | |
| 25 | PLANNED | 0 | 0 | 10.0 | .0 | | | | | | |
| 26 | PLANNED | 0 | 0 | 9.75 | .0 | | | | | | |
| 27 | PLANNED | 0 | 0 | 9.75 | .0 | | | | | | |

**Wave Status Window**

### Close a Wave

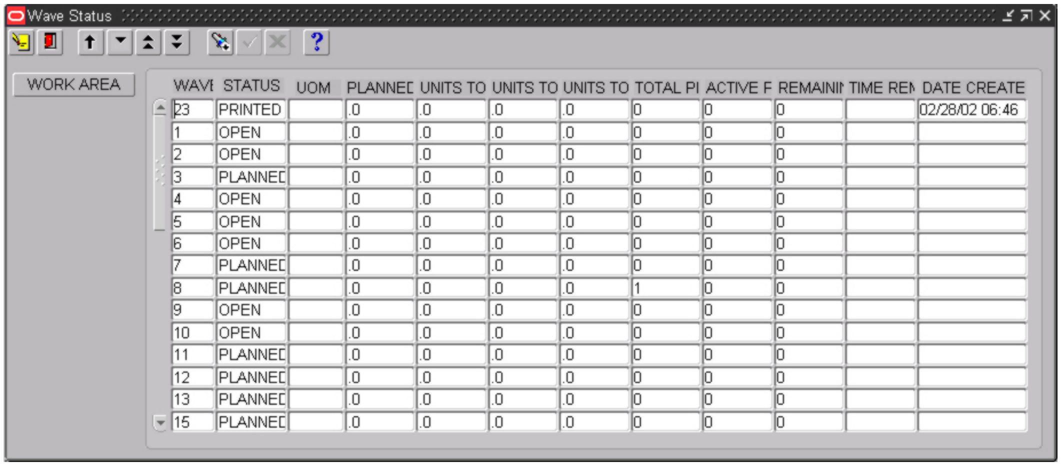
1. On the Wave Status window, select the wave that you want to close.
2. Click **Close Wave**.
3. When prompted to confirm the closure, click **Yes**. The status of the wave changes to Avail (Available).

### Exit the Wave Status Window

- Click the exit button to close the window.

# Monitor Waves

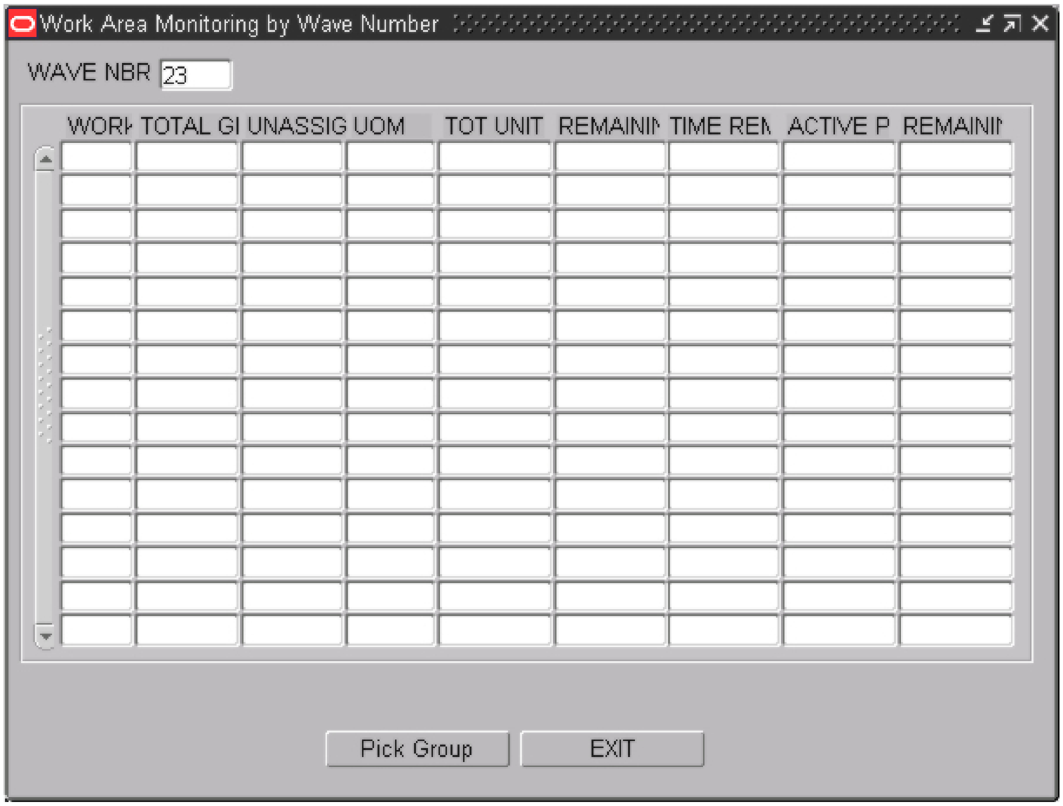
**Navigate:** From the main menu, select Distribution Planning > Wave Monitoring. The current progress of the waves opens in the Wave Status (Monitoring) window.




**Wave Status (Monitoring) Window**

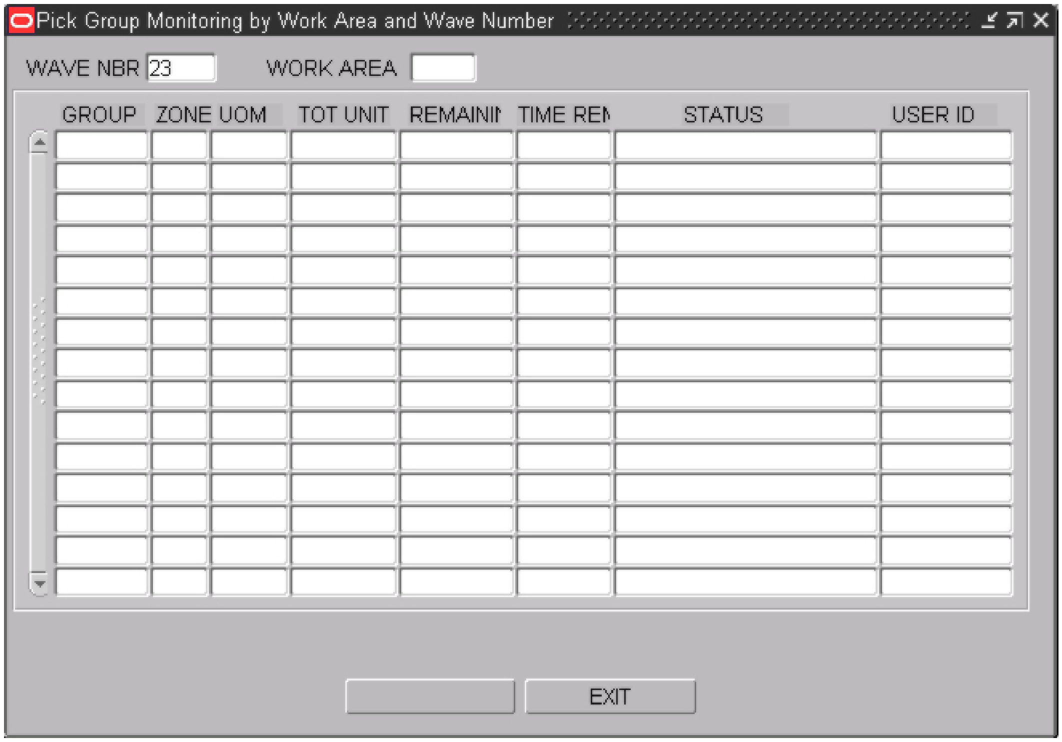
## View Work Areas and Pick Groups by Wave

1. On the Wave Status (Monitoring) window, select the wave that you want to view in detail.
2. Click **Work Area**. The current progress in the work areas opens in the Work Area Monitoring by Wave Number window.




**Work Area Monitoring by Wave Number Window**

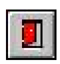
3. On the Work Area Monitoring by Wave Number window, select the Pick Group that you want to view in detail.
4. Click **Pick Group**. The current progress by group opens in the Pick Group Monitoring by Work Area and Wave Number window.




**Pick Group Monitoring by Work Area and Wave Number Window**

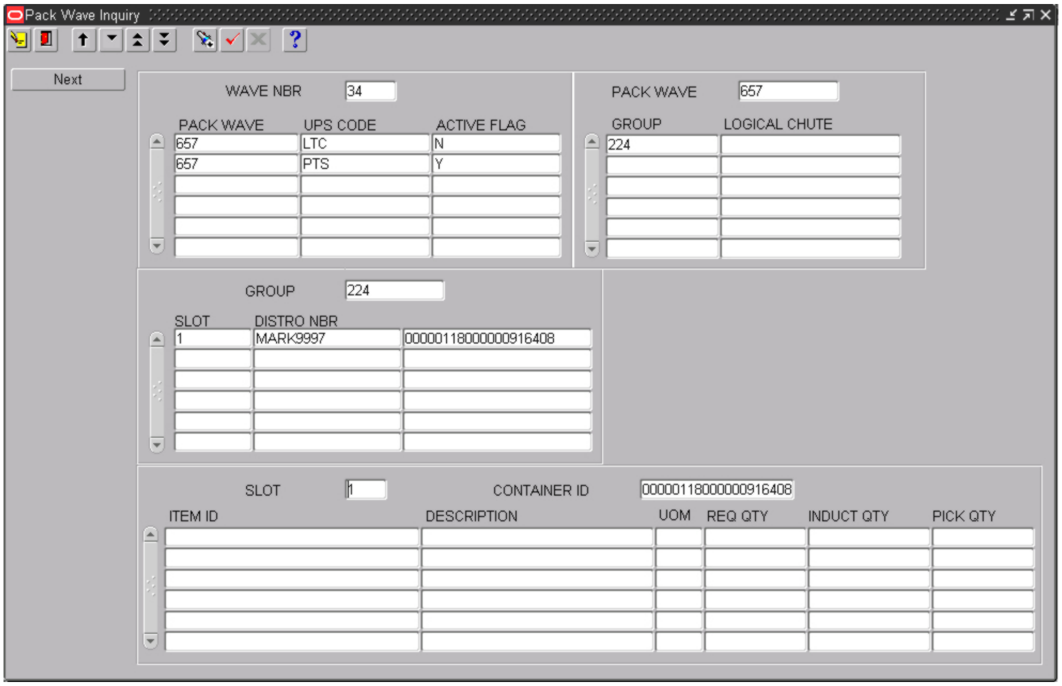
5. Click **Exit** on each window to close the windows.

## Exit the Wave Status (Monitoring) Window

- Click the exit  button to close the window.

# View Pack Waves

**Navigate:** From the main menu, select Distribution Planning > Pack Wave Inquiry. The Pack Wave Inquiry window opens.




**Pack Wave Inquiry Window**

## Display Pack Waves by Wave

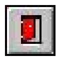
**Note:** There are four blocks on this window. From top to bottom, they are referred to as the Wave block, Pack Wave block, Group block, and Slot block.

1. If any pack waves are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Wave Nbr query field, enter the wave number, or click the LOV  button and select the wave.
4. Click the execute query  button. The pack wave details for the selected wave are displayed.

## View Additional Pack Wave Details

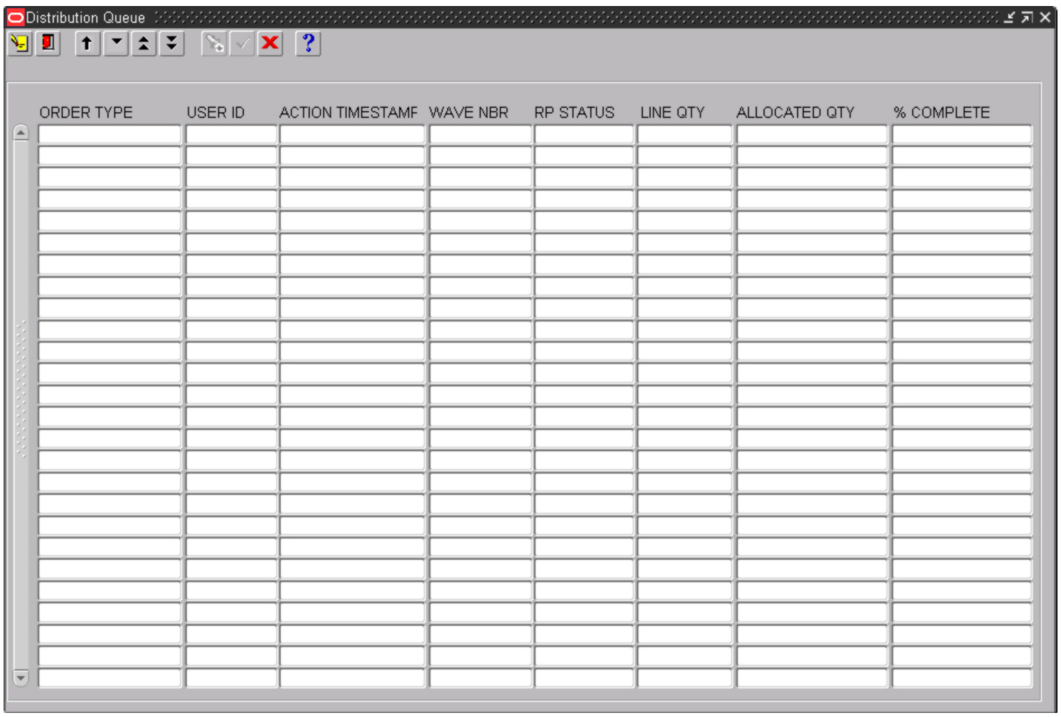
1. On the Pack Wave Inquiry window, select the pack wave that you want to view in detail.
2. Click **Next**. The groups associated with the selected pack wave appear in the Pack Wave block.
3. Select the group that you want to view in detail.
4. Click **Next**. The slots associated with the selected group appear in the Group block.
5. Select the slot that you want to view in detail.
6. Click **Next**. The container and items associated with the selected slot appear in the Slot block.

## Exit the Pack Wave Inquiry Window

- Click the exit  button to close the window.

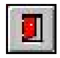
# View the Distribution Queue

**Navigate:** From the main menu, select Distribution Planning > Distribution Queue Inquiry. The progress of the individual pick waves opens in the Distribution Queue window.



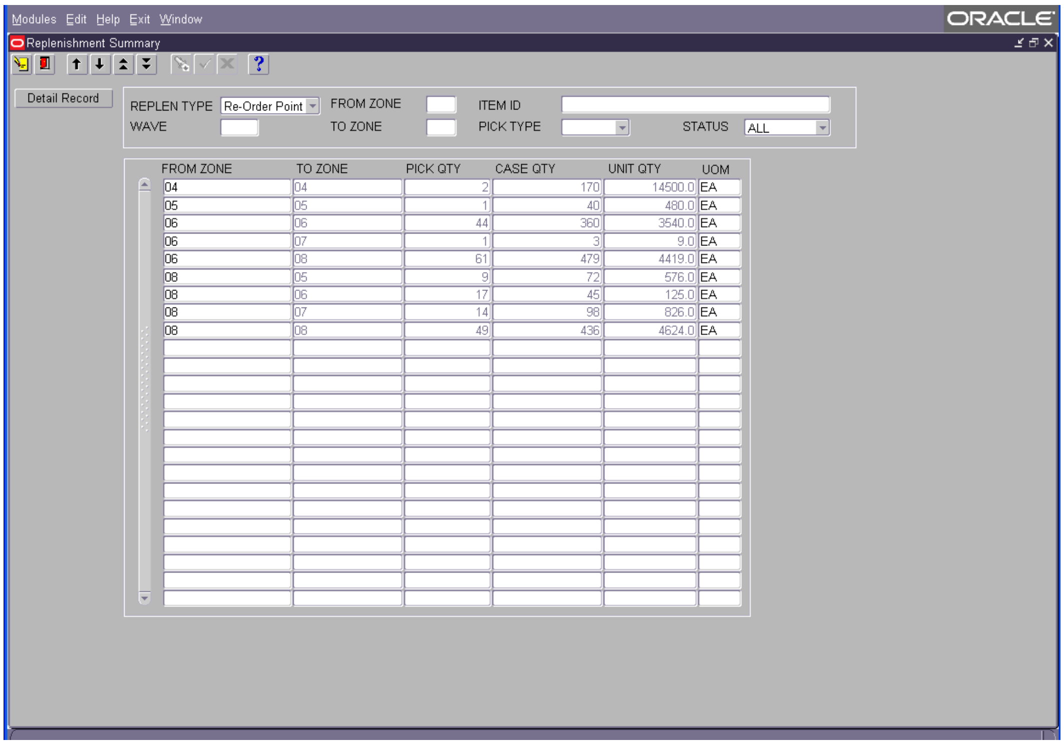

**Distribution Queue Window**

### Exit the Distribution Queue Window

- Click the exit  button to close the window.

## Maintain Replenishment Picks

**Navigate:** From the main menu, select Distribution Planning > Replenishment Summary. The Replenishment Summary window opens.




**Replenishment Summary Window**

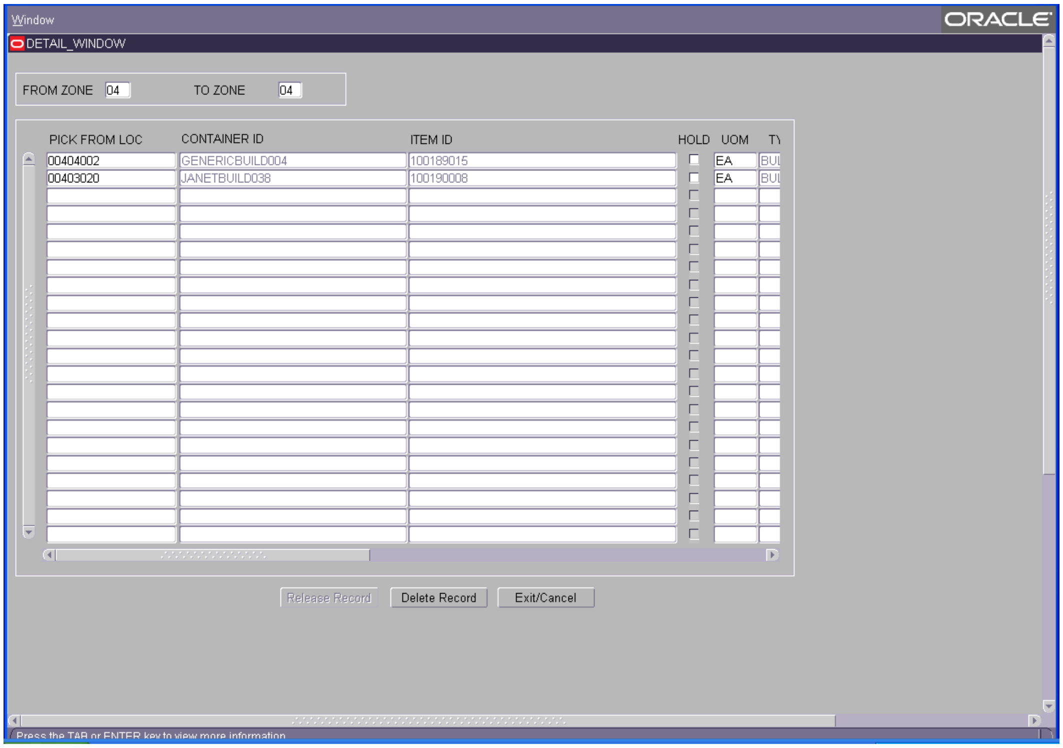
> **Note:** You can access the Replenishment Summary window from the main menu. Select Operational Overview > Replenishment Overview. Select a line type, then click **Replenishment Summary**.

### Display the Remaining Picks

1. If any replenishment records are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Replen Type query field, select a replenishment type.
4. To narrow the scope of the query, enter criteria in one or more of the query fields.
5. Click the execute  query button. The remaining picks that match the criteria appear.

### View the Pick Directives

1. On the Replenishment Summary window, select the record that you want to view in detail.
2. Click **Detail Record**. The pick directives associated with the selected record appear in the Detail window.




**Detail Window**

3. Click the **Exit/Cancel** button to close the Detail window.

## Delete a Dick Directive

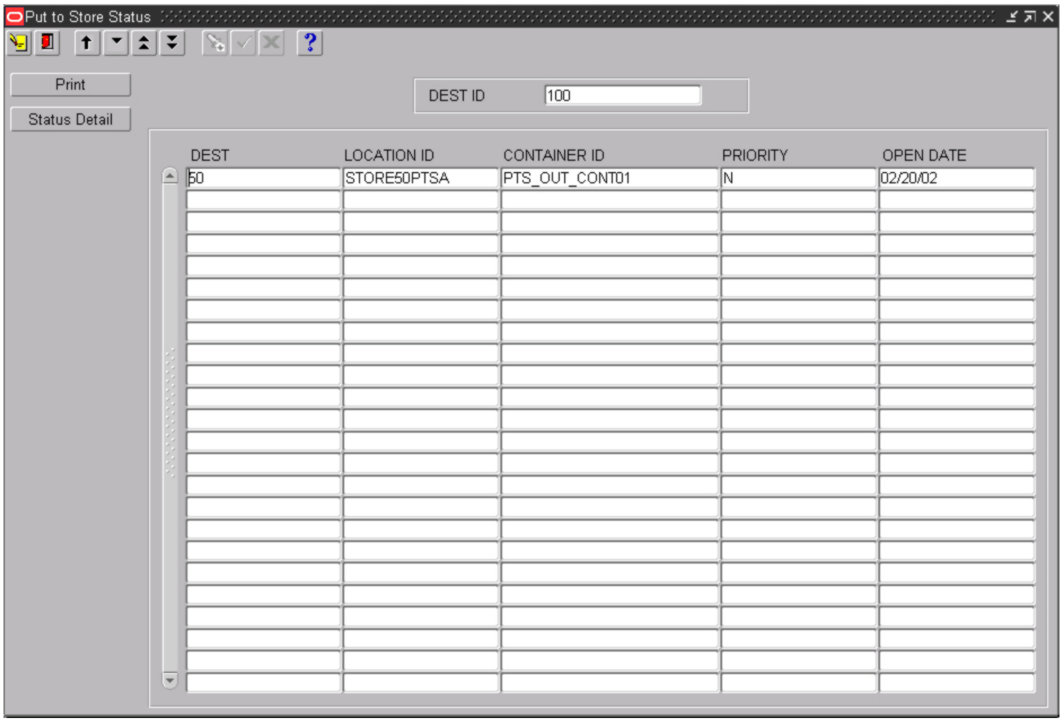
1. On the Replenishment Summary window, select the record that you want to view in detail.
2. Click **Detail Record**. The pick directives associated with the selected record appear in the Detail window.
3. Select the pick directive that you want to delete.
4. Click **Delete Record**.
5. When prompted to delete the record, click **Yes**.
6. Click the **Exit/Cancel** button to close the Detail window.

## Exit the Replenishment Summary Window

- Click the exit  button to close the window.

# View Open PTS Containers

**Navigate:** From the main menu, select Distribution Planning > Put to Store Status. The Put to Store Status window opens.




**Put to Store Status Window**

## Display All Destinations

- Click the execute query  button.

## Display a Destination

1. If any destinations are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Dest ID query field, enter the destination ID, or click the LOV  button and select the destination.
4. Click the execute query  button. The details for the selected destination are displayed.

## View Container Level Details

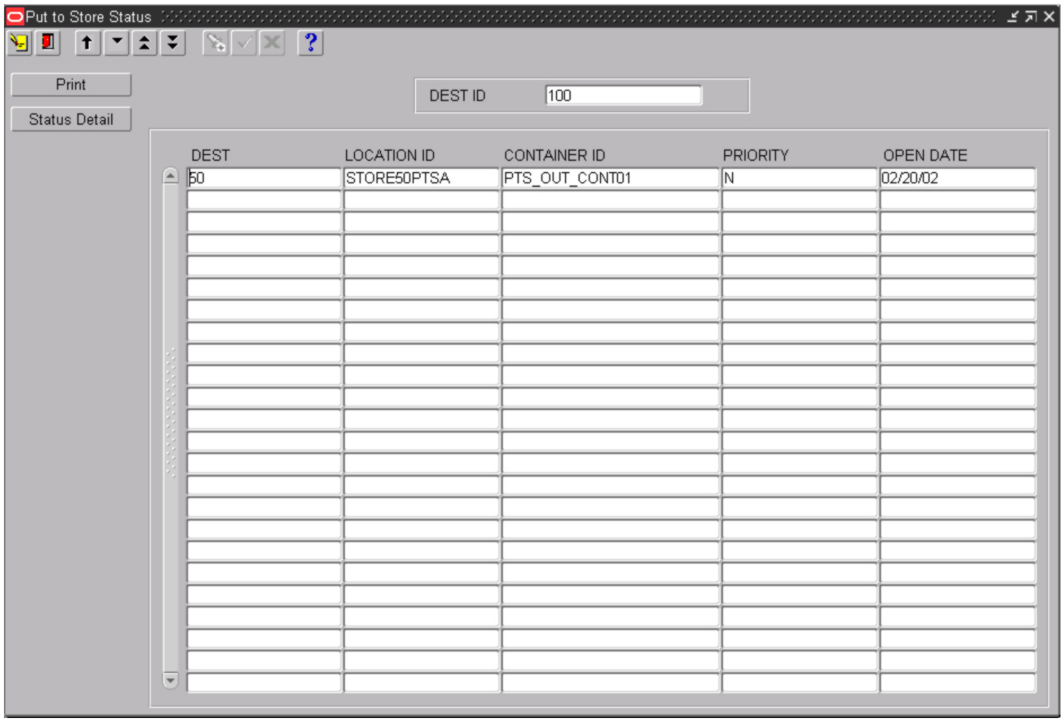
1. On the Put to Store Status window, select the destination that you want to view in detail.
2. Click **Status Detail**. The container level details appear.
3. Click the exit  button.

## Exit the Put to Store Status Window

- Click the exit button to close the window.

# Generate the PTS Containers to Close Report

**Navigate:** From the main menu, select Distribution Planning > Put to Store Status. The Put to Store Status window opens.




**Put to Store Status Window**

## Display All Destinations

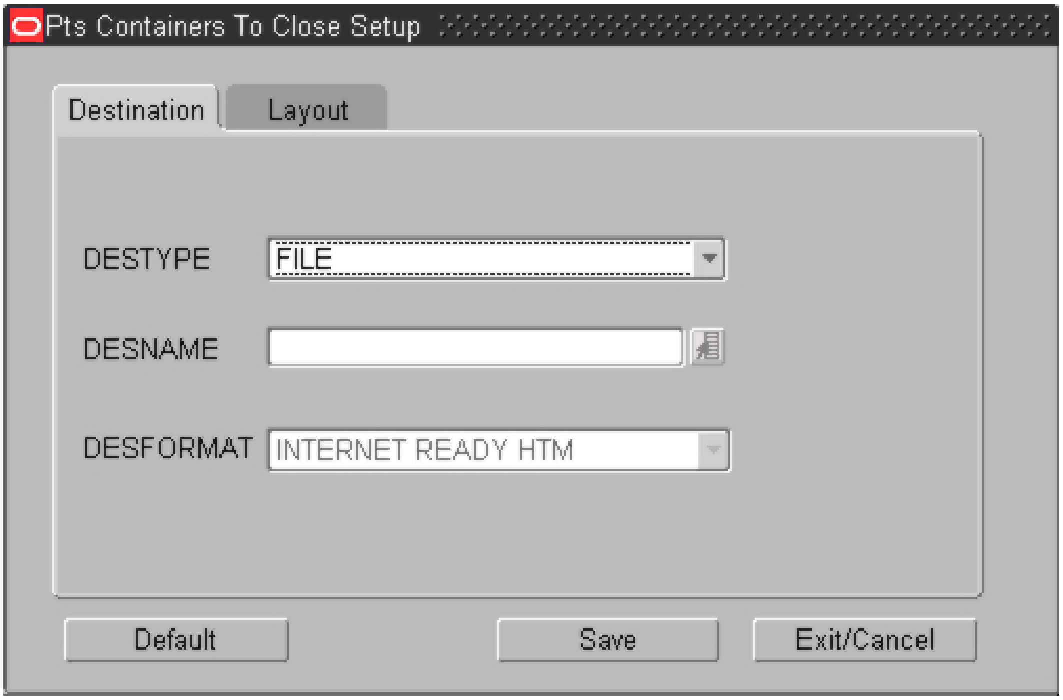
- Click the execute query button.

## Display a Destination

1. If any destinations are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Dest ID query field, enter the destination ID, or click the LOV button and select the destination.
4. Click the execute query button. The details for the selected destination are displayed.

## Generate the PTS Containers to Close Report

1. Click **Print**. The PTS Containers to Close Setup window opens.




**PTS Containers to Close Setup Window**

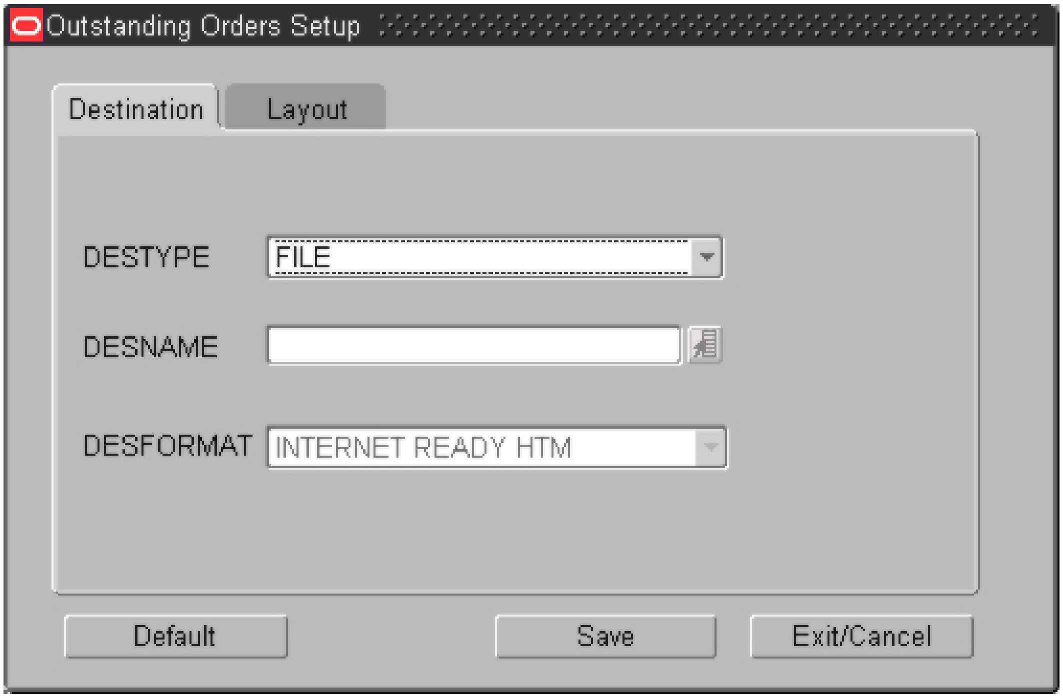
2. In the Destype field, select the type of destination.
3. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

4. To view the layout of the report, click on the Layout tab.
5. Click **Save**. The report is sent to the selected destination.

# Generate the Outstanding Orders Report

**Navigate:** From the main menu, select Distribution Planning > Reports > Outstanding Orders Report. The Outstanding Orders Setup window opens.




**Outstanding Orders Setup Window**

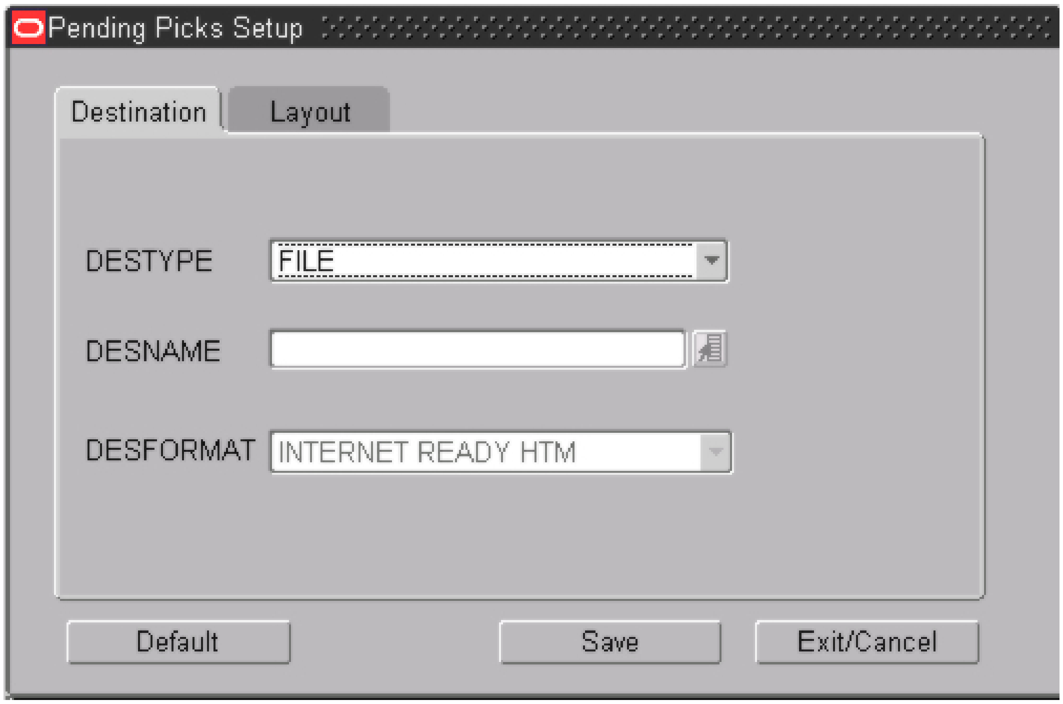
1. In the Destype field, select the type of destination.
2. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

3. To view the layout of the report, click on the Layout tab.
4. Click **Save**. The report is sent to the selected destination.

# Generate the Pending Picks Report

**Navigate:** From the main menu, select Distribution Planning > Reports > Pending Picks Report. The Pending Picks Setup window opens.




**Pending Picks Setup Window**

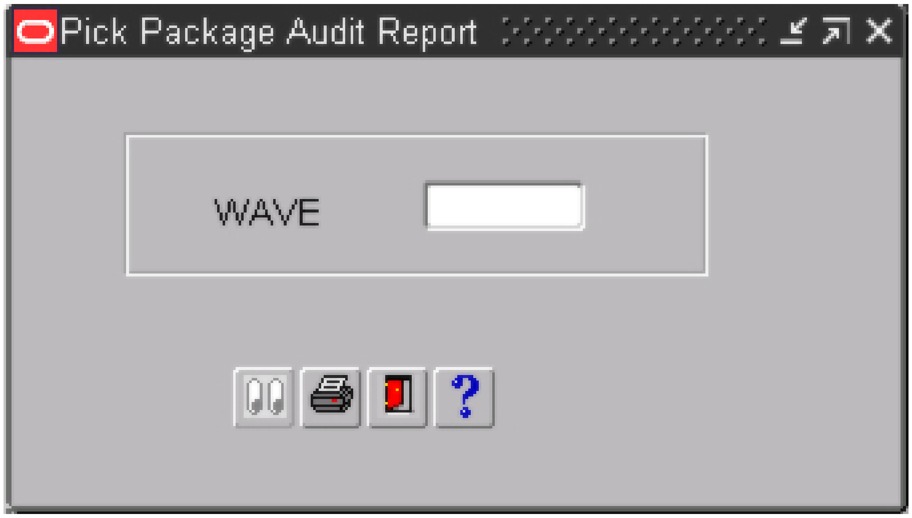
1. In the Destype field, select the type of destination.
2. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

3. To view the layout of the report, click on the Layout tab.
4. Click **Save**. The report is sent to the selected destination.

# Generate the Pick Package Audit Report

**Navigate:** From the main menu, select Distribution Planning > Reports > Pick Package Audit Report. The Pick Package Audit Report window opens.




**Pick Package Audit Report Window**

1. In the Wave field, enter the wave number that you want to include in the report.
2. Click the print  button. The report is sent to the default destination.

# 8 Shipping

## Shipping Overview

Many of the shipping tasks are performed using a hand-held, truck mounted, or wrist mounted radio frequency (RF) device. The RF device can be used when loading and unloading trailers, and to indicate the status of a trailer. Information from the RF device is transmitted to RWMS, where it can be monitored.

In RWMS, you can estimate the total weight and volume of a stock order or shipment so you can better plan your routes. You can plan the amount of physical space needed in the trailer and the best order to load the trailer for the route. You can send the estimates to a third party system to determine optimal trailer loading. The third party system communicates that information back to RWMS and to the warehouse.

### Business Process

You can monitor the loading progress at shipping doors. The status of a door may be:

- Busy: Either a trailer is being loaded or the door is blocked and can not be used.
- Available: The door is not blocked or in use. A trailer may be assigned to the door for loading.

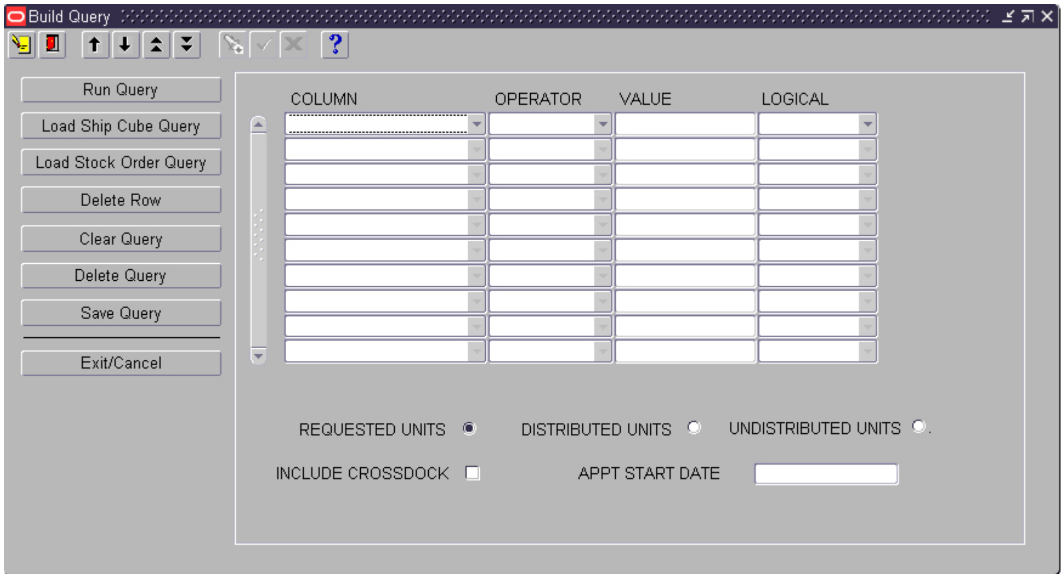
### Reports

The following reports pertain to shipping:

- Bill of Lading report: Provides a list of the items that are loaded in a trailer for a specified bill of lading.
- Container Manifest report: Provides a list of items in the containers for a specified bill of lading.
- Destination Shipment Audit report: Provides the details of one or more manifests for a specified trailer ID and ship date.
- Outbound Quality Audit report: Provides a comparison between expected item counts and actual item counts for a specified outbound container.
- Unloaded Container report: Provides a list of all locations that contain container that are qualified to be shipped, then displays containers for that location, based on carrier/service/route or destination ID. Warehouse personnel can use the information to pick and load the containers onto trailers.

# Query Shipment Volume and Weight

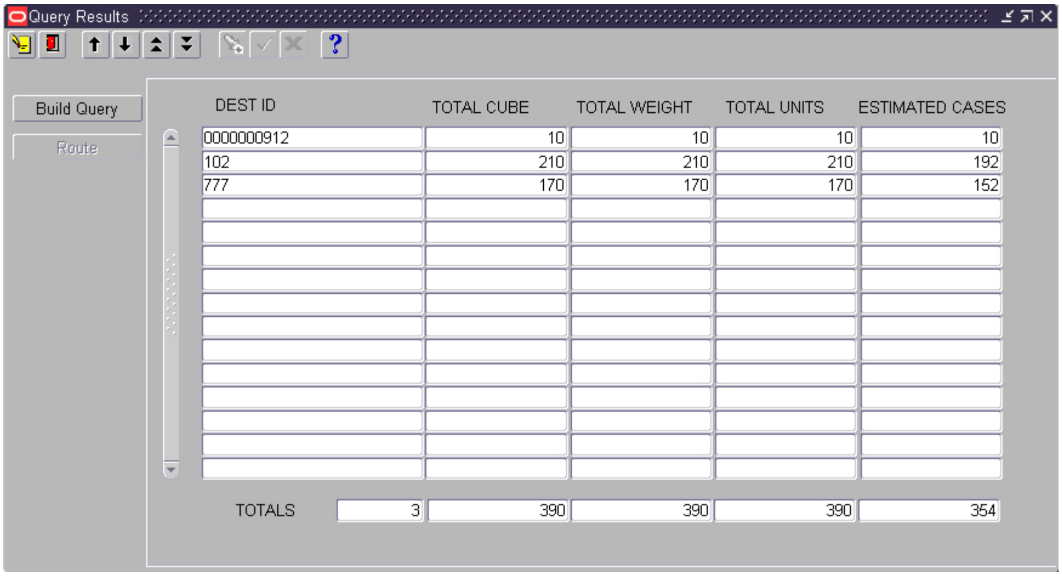
**Navigate:** From the main menu, select Shipping > Ship Cube Inquiry. The Build Query window opens.




**Build Query Window**

## Run a Query

1. If a query opens, click **Clear Query.**
2. To load a query:
   – To run a ship cube query, click **Load Ship Cube Query**.
   – To run a stock order query, click **Load Stock Order Query**.
3. Select a query and click **Load Query**.
4. On the Build Query window, click **Run Query**.
5. When prompted to continue, click **Yes**. The results appear on the Query Results window.




**Query Results Window**

## Route the Query Results

1. On the Query Results window, click **Route**.
2. The Create Routing File window opens.
3. In the Ship Date field, enter the date the shipment should be sent.
4. Click **Route** to save your changes and close the window.

## Build a Query

1. In the Column fields, select a limiting element.
2. In the Operator fields, select a relational operator.
3. In the Value fields, enter the value of the element selected in the Column field.
4. In the Logical field, enter the logical operator used to join two or more conditions.
5. Enter additional conditions as necessary.
6. You can add the following criteria to restrict your query:

| Criteria | Restriction |
|---|---|
| Requested Units | The query includes all requested units ordered, regardless of distributed status. |
| Distributed Units | The query includes only units that have been distributed |
| Undistributed Units | The query includes only units that are not yet distributed. |
| Include Crossdock & Appointment Date | The query includes units on crossdock orders, after the appointment date is specified. |

7. To save a query:
   a. Click **Save Query**. The Save Shipping Query window opens.
   b. In the Save field, enter the name of the query.

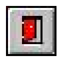
> **Note:** You can only save a shipping query. You can maintain stock order queries in the Stock Order windows.

c. Click **Save Query** to save your changes and close the window.

## Delete a Query

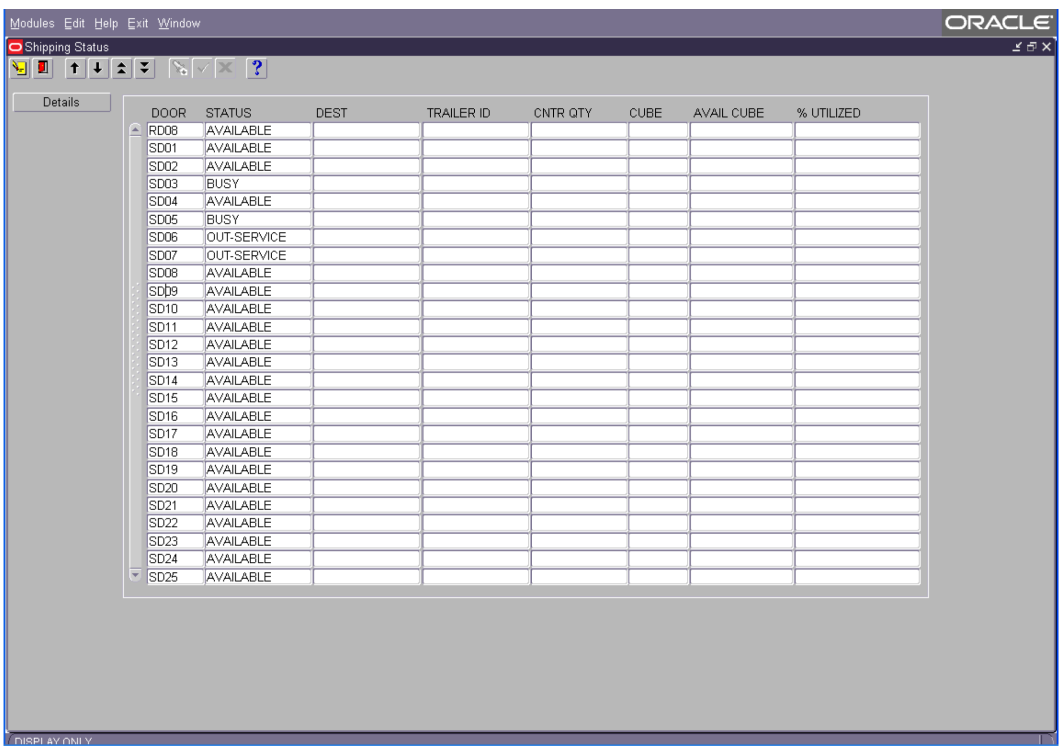
1. On the Build Query window, click **Delete Query**. The Delete Query window opens.
2. Select the query that you want to delete.
3. Click **Delete Query**.
4. When prompted to delete the record, click **Yes**. The query is deleted and you are returned to the Build Query window.

## Exit the Build Query Windows

- Click the exit  button to close the window.

# View Statuses of All Shipping Doors

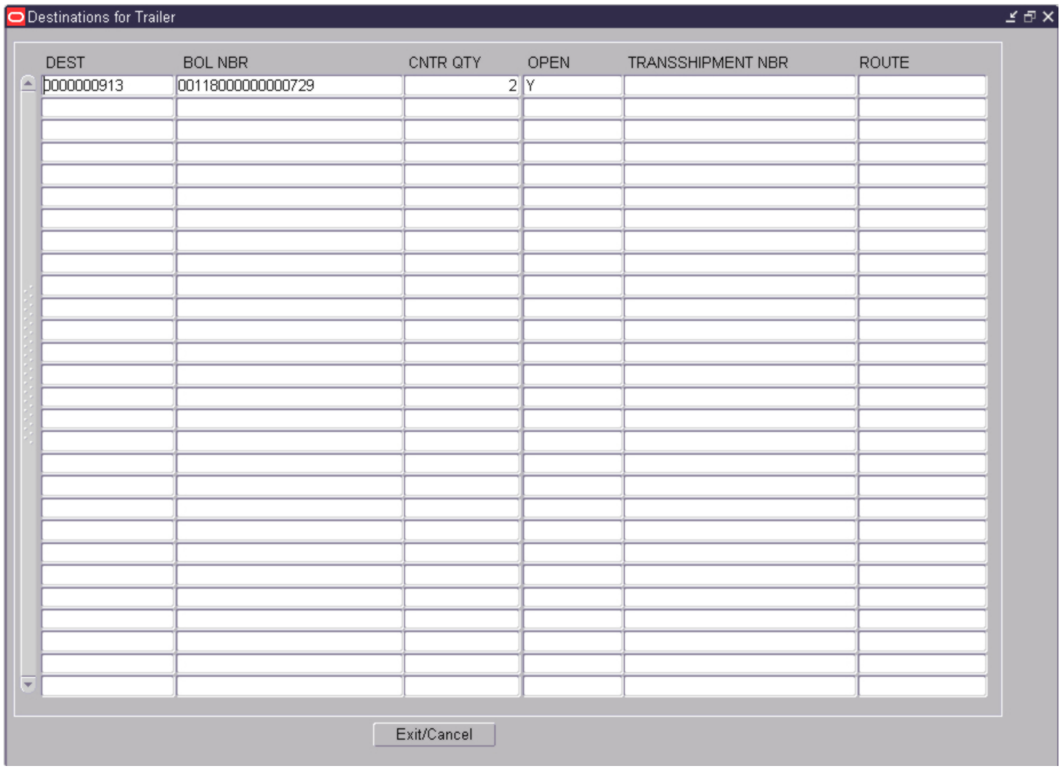
**Navigate:** From the main menu, select Shipping > Shipping Status. The statuses of all shipping doors appear in the Shipping Status window.




**Shipping Status Window**

## View a Trailer Manifest

1. On the Shipping Status window, select the trailer that you want to view in detail.
2. Click **Details**. The trailer manifest opens in the Destinations for Trailer window.




**Destinations for Trailer Window**

3. Click **Exit/Cancel** to close the Destinations for Trailer window.

## Exit the Shipping Status Window

- Click the exit button to close the window.

# Generate the Bill of Lading Report

**Navigate:** From the main menu, select Shipping > Reports > Bill of Lading Advice Report. The Bill of Lading Report window opens.


**Bill of Lading Report Window**

1. In the BOL Nbr field, enter the bill of lading number, or click the LOV button and select the bill of lading.
   - To print the report, click the print button. The report is sent to the default destination.
   - To email the report, click the email button. The report is sent to the default destination.
2. Click the exit button to close the window.

## Generate the Container Manifest Report

**Navigate:** From the main menu, select Shipping > Reports > Container Manifest Audit Report. The Container Manifest Report window opens.


**Container Manifest Report Window**

1. In the BOL Nbr field, enter the bill of lading number, or click the LOV button and select the bill of lading.
   - To print the report, click the print button. The report is sent to the default destination.
   - To email the report, click the email button. The report is sent to the default destination.
2. Click the exit button to close the window.

# Generate the Destination Shipment Audit Report

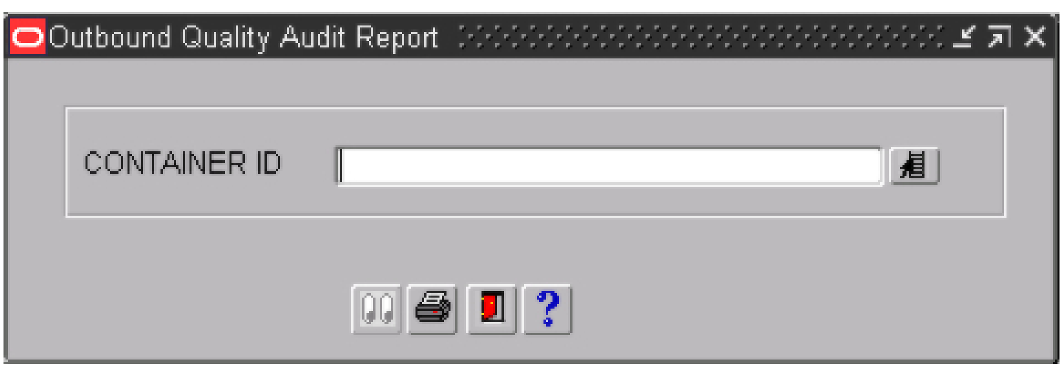
**Navigate:** From the main menu, select Shipping > Reports > Ship Audit Report. The Ship Audit Report window opens.


**Ship Audit Report Window**

1. In the Trailer ID field, select the ID of the trailer, or click the LOV  button and select the trailer. The ship date is automatically filled in.
2. In the Detail field, enter Y (Yes) to include or N (No) to exclude details at the container level.
3. Click the print  button. The report is sent to the default destination.

# Generate the Outbound Quality Audit Report

**Navigate:** From the main menu, select Shipping > Reports > Outbound Quality Audit Report. The Outbound Quality Audit Report window opens.




**Outbound Quality Audit Report Window**

1. In the Container ID field, enter the ID of the outbound container, or click the LOV  button and select the container.
2. Click the print  button. The report is sent to the default destination.

# Generate the Unloaded Container Report

**Navigate:** From the main menu, select Shipping > Reports > Unloaded Container Report. The Unloaded Container Report window opens.

1. In the Carrier field, enter the name of the carrier.
2. In the Service, Route, and Dest field, enter the appropriate information.
3. Click the print  button. The report is sent to the default destination.

# 9

# Trailer Management

## Trailer Management Overview

The Trailer Management module allows you to track and manage the status of inbound and outbound trailers.

The system tracks the status of all trailers in the fleet. The status may be:

- Arrived inbound: The trailer is checked in and is either staged at a receiving door or assigned to a yard location.
- Checked out: The trailer is checked out.
- Loaded: The trailer is loaded for outbound transit.
- Out of service: The trailer is not usable.
- Scheduled: The trailer has a designated appointment time, but has not yet been checked in to the yard.
- Shipped: The trailer is loaded with outbound merchandise and in-transit to its destinations.
- Unloaded: The trailer is unloaded and released, but still in the yard. Outbound arrivals are given this status when they are checked in.
- Unloading: The trailer is being unloaded at the receiving door.
- Unknown: The trailer status is unknown.

### Business Process

You can look up the status of all trailers, or specifically trailers in the yard. You can change the status of trailers in the yard from Unloaded to Out of Service or from Out of Service to Unloaded.

You can check in trailers with a status of Scheduled or Checked Out. The status of the checked in trailer changes from Scheduled to Arrived Inbound or from Checked Out to Unloaded.

You can check out trailers with a status of Shipped or Unloaded. The status of the checked out trailers changes to Checked Out.

If a trailer arrives that is not identified in the system you can add it. In addition, you can identify or change the carrier and yard location as necessary.

You can look up the contents of any inbound or outbound trailer. The details can be displayed by item, destination, or container.

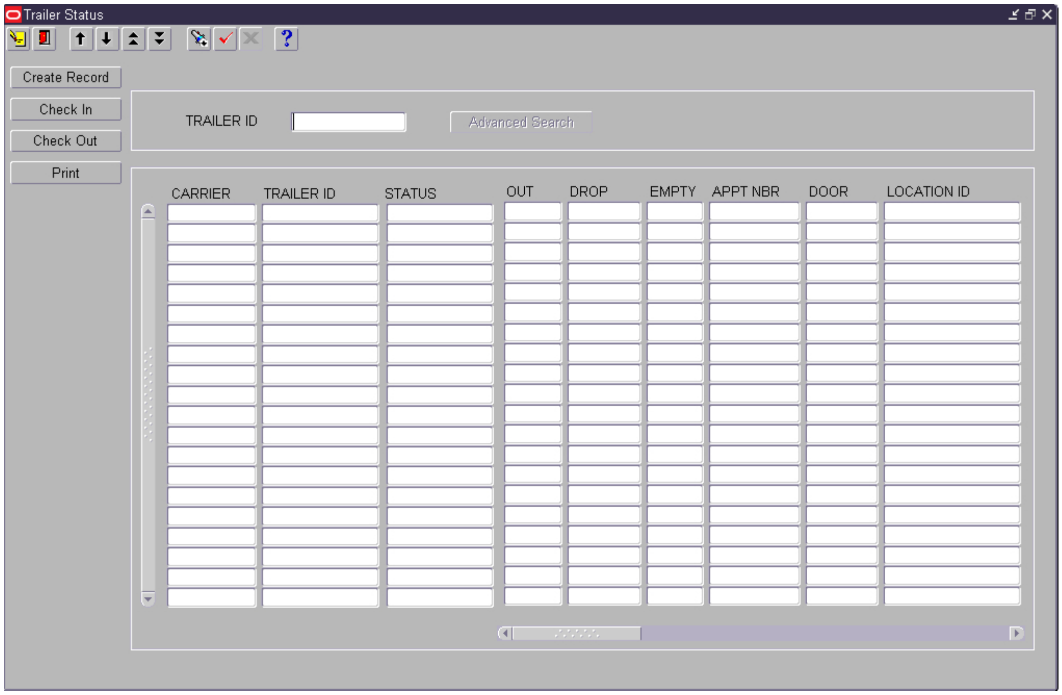
### Reports

The following reports are available in the Trailer Management module:

- Trailer Status report: Provides the status of all inbound and outbound trailers.
- Yard Status report: Provides the status of trailers at all yard locations.

# Maintain Trailer Status

**Navigate:** From the main menu, select Trailer Management > Trailer Status. The Trailer Status window opens.



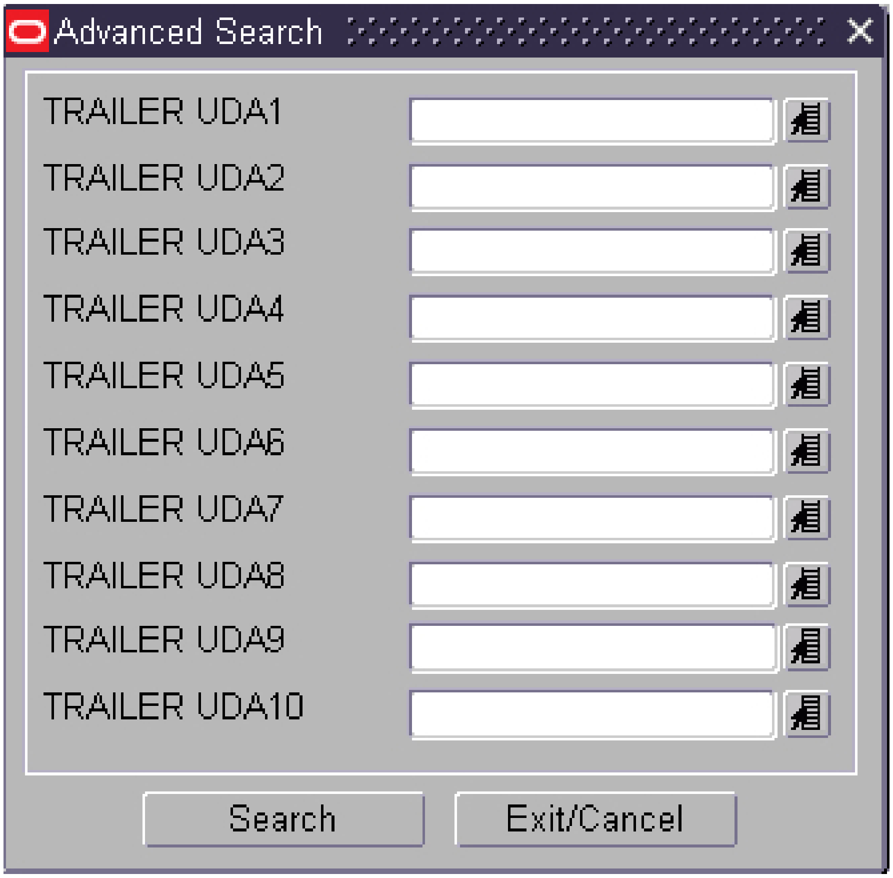

**Trailer Status Window**

## Display All Trailers

- Click the execute query  button.

## Display a Subset of Trailers

1. If any trailers are currently displayed, click the clear  button.
2. Click the enter query  button.
3. Click Advance Search. The Advanced Search window opens.

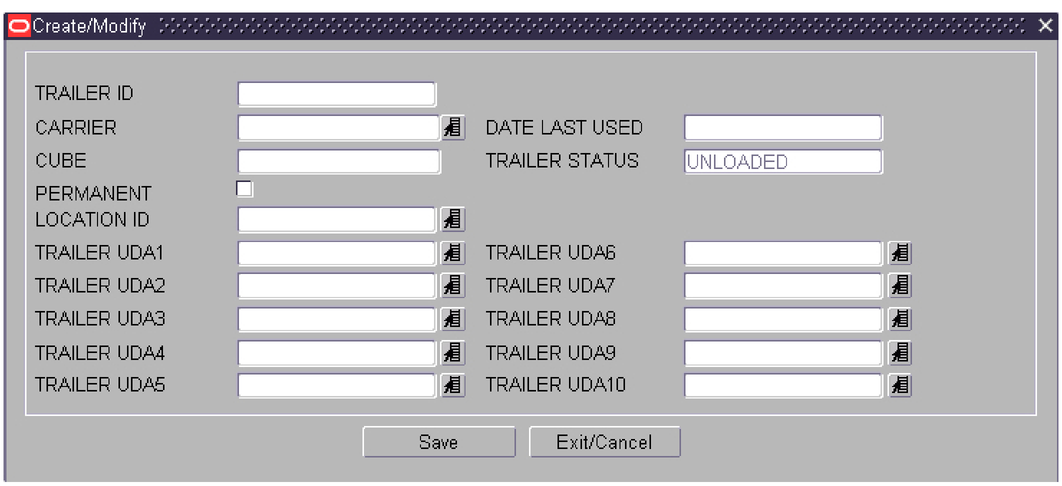



**Advanced Search Window**

4. In the criteria fields, enter a partial ID, or click the LOV  button and select the criterion.
5. Click **Search**. The trailers appear on the Trailer Status window.

## Add a Trailer

1. On the Trailer Editor window, click **Create Record**. The Create/Modify window opens.




**Create/Modify Window**

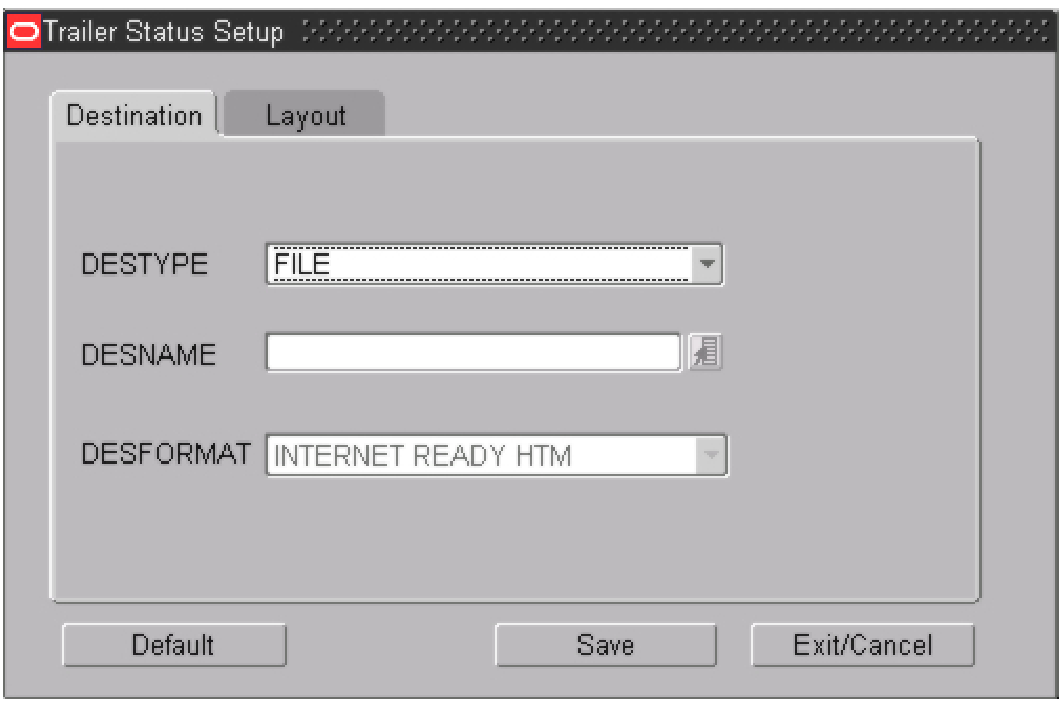
2. In the Trailer ID field, enter the ID of the trailer.
3. In the Carrier field, enter the code for the carrier, or click the LOV button and select the carrier.
4. In the Location ID field, enter the ID of the yard location, or click the LOV button and select the location.
5. In the Appt NBR field, enter the appointment number, or click the LOV button and select the number.
6. In the Mode field, enter the mode for the trailer.
7. Click **Save** to save the changes and close the Create/Modify window.

## Edit the Status of a Trailer

1. On the Trailer Status window, select the trailer that you want to edit.
2. Click **Check In** to change the status of a trailer from Scheduled to Arrived Inbound or from Checked-out to Unloaded.
   Click **Check Out** to change the status of a trailer from Shipped or Unloaded to Checked Out.

## Generate the Trailer Status Report

1. On the Trailer Status window, click **Print**. The Trailer Status Setup window opens.



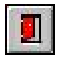

**Trailer Status Setup Window**

2. In the Destype field, select the type of destination.
3. In the Desname field, select the name of the destination.

**Note:** To return to the default settings, click Default.

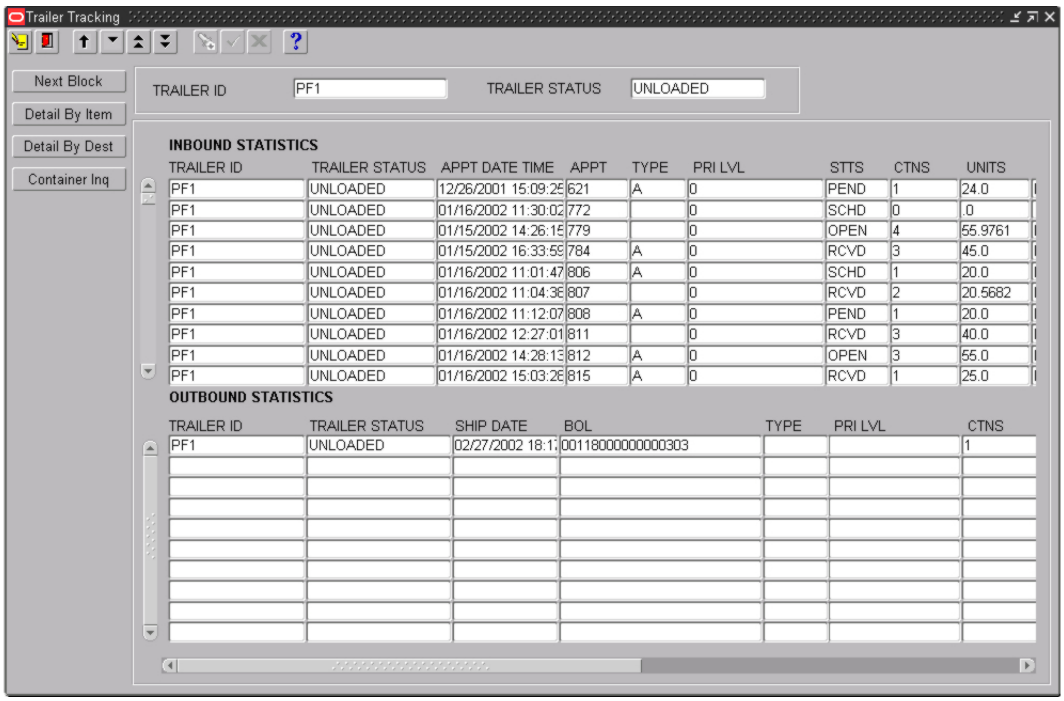
4. To view the layout of the report, click on the Layout tab.
5. Click **Save**. The report is sent to the selected destination.

## Exit the Trailer Status Window

- Click the exit  button to close the window.

# View Merchandise in Trailers

**Navigate:** From the main menu, select Trailer Management > Trailer Tracking. The Trailer Tracking window opens.




**Trailer Tracking Window**

## Display All Trailers

- Click the execute query  button.

## Display a Subset of Trailers

1. If any trailers are currently displayed, click the clear button.
2. Click the enter query button. The Advanced Search button is enabled.
3. Click **Advanced Search**. The Advanced Search window opens.
4. In the criteria fields, enter a partial ID, or click the LOV button and select the criterion.
5. Click the execute query button. The trailer or trailers that match the selected criteria appear.

## Display a Trailer

1. If any inbound and outbound trailers are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Trailer ID query field, enter the trailer ID, or click the LOV button and select the trailer.
4. Click the execute query button. The details of the selected trailer appear.

## View Details by Item

1. On the Trailer Tracking window, click **Next Block** to place the cursor in either the Inbound Statistics or Outbound Statistics table.
2. Select the trailer that you want to view in detail.
3. Click **Detail by Item**. The Details (by Item) window opens. The details are sorted by item ID.
4. Click **Exit/Cancel** to close the window.

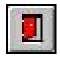
## View Details by Location

1. On the Trailer Tracking window, click **Next Block** to place the cursor in either the Inbound Statistics or Outbound Statistics table.
2. Select the trailer that you want to view in detail.
3. Click **Detail by Dest**. The items and locations for the selected trailer appear. The details are sorted by location ID.
4. Click **Exit/Cancel** to close the window.

## View Details by Container

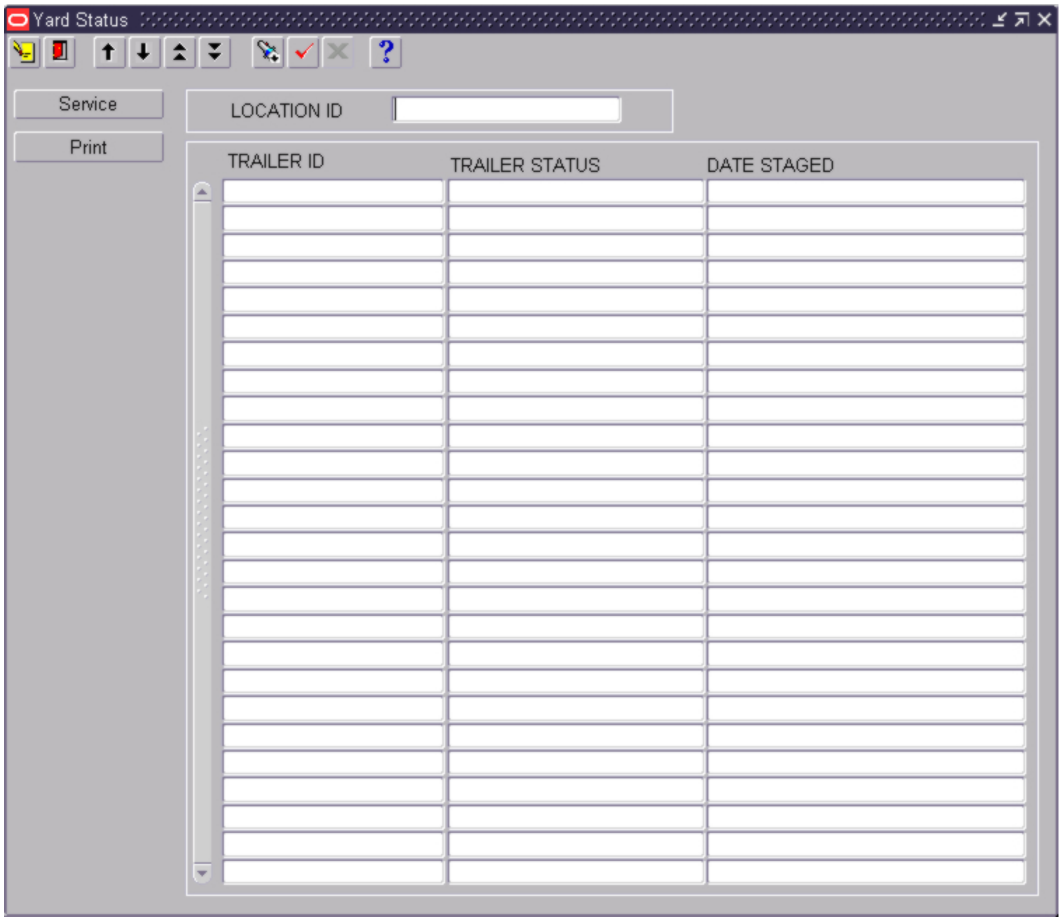
1. On the Trailer Tracking window, click **Next Block** to place the cursor in either the Inbound Statistics or Outbound Statistics table.
2. Select the trailer that you want to view in detail.
3. Click **Container Inq**. The Container Inquiry window opens.
4. Click **Exit/Cancel** to close the window.

### Exit the Trailer Tracking Window

- Click the exit  button to close the window.

## Maintain Trailer Statuses in the Yard

**Navigate:** From the main menu, select Trailer Management > Yard Status. The Yard Status window opens.




**Yard Status Window**

### Display Trailers at All Yard Locations

- Click the execute query  button.

## Display Trailers by Yard Location

1. If any trailers are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Location ID query field, enter the ID of the yard location, or click the LOV button and select the location.
4. Click the execute query button. The trailers at the selected yard location are displayed.

## Edit the Status of a Trailer

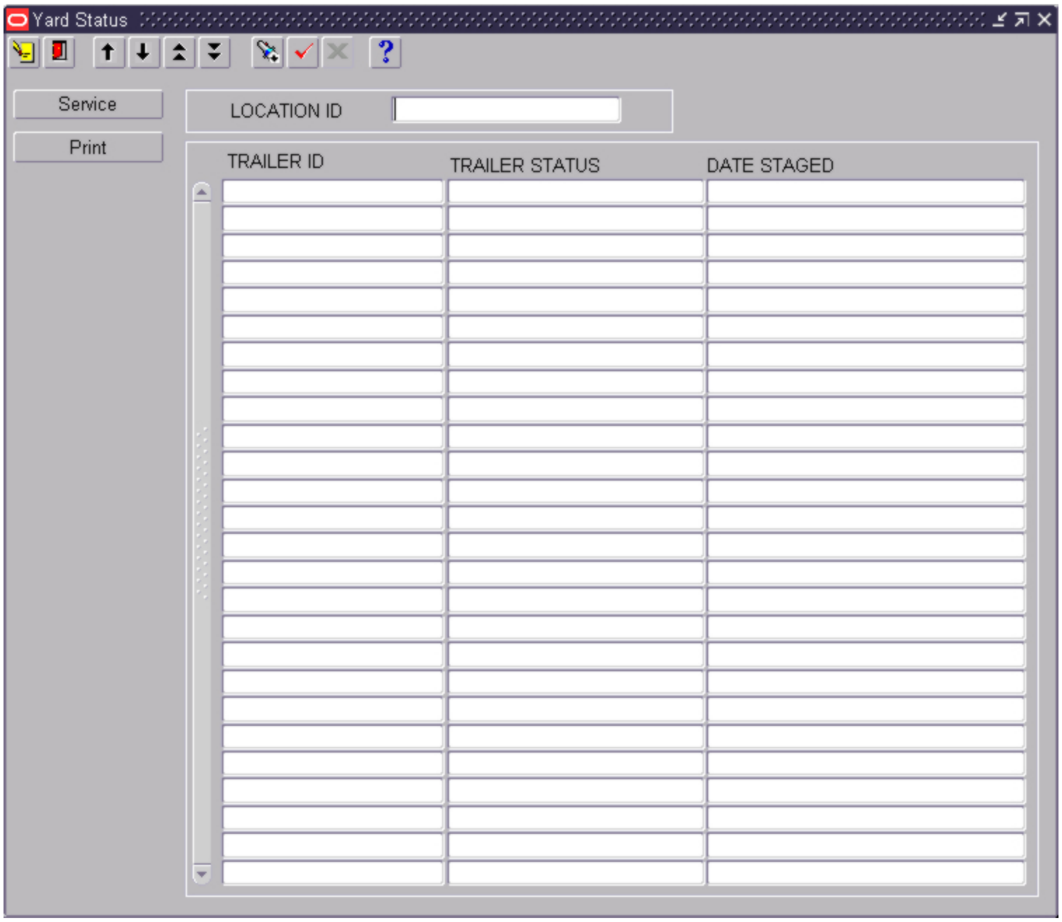
1. On the Yard Status window, select the trailer that you want to edit.
2. Click **Service** to toggle the status from Unloaded to Out of Service or from Out of Service to Unloaded.

## Exit the Yard Status Window

- Click the exit button to close the window.

# Generate the Yard Status Report

**Navigate:** From the main menu, select Trailer Management > Yard Status. The Yard Status window opens.



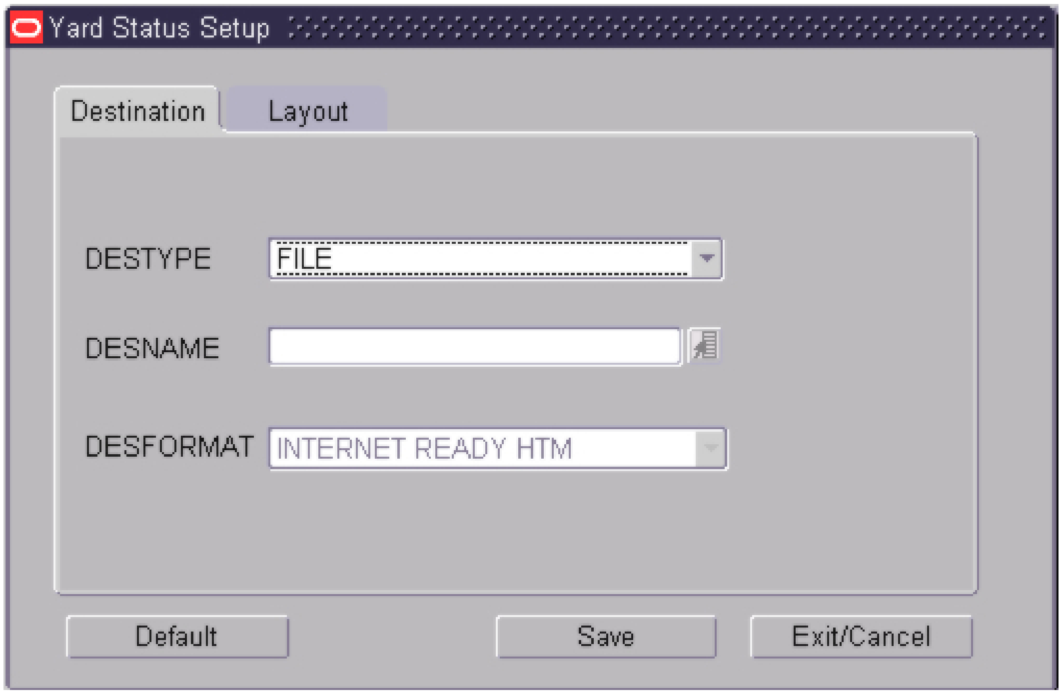

**Yard Status Window**

## Display Trailers at All Yard Locations

- Click the execute query  button.

## Generate the Yard Status Report

1. On the Yard Status window, click **Print**. The Yard Status Setup window opens.




**Yard Status Setup Window**

2. In the Destype field, select the type of destination.
3. In the Desname field, select the name of the destination.

> **Note:** To return to the default settings, click **Default**.

4. To view the layout of the report, click on the Layout tab.
5. Click **Save**. The report is sent the selected destination.

# 10

# Activity History Log

## Activity History Log Overview

The activity history log allows you to track historical information about activities within a distribution center. You can choose which data should be tracked and specify the sources of that data.

Some basic reports and simple query functionality are provided within RWMS. It is recommended that more extensive manipulation of the data be performed with data warehousing tools.

As containers pass through distribution center, historical records are kept in RWMS. You can use this information to track a container's progress.

### Business Process

There are three phases to setting up the activity history log in RWMS:

- A system option must be set to turn on the logging function.
- You must indicate how many days worth of data to retain for each table. Data older than the set number of days are purged from the log.
- You must select the fields against which activity is logged. You can select those fields by screen or by table/field. Some activities, however, are always logged. These activities involve users overriding certain defaults and skipping activities.

Simple queries can be run on the data from within RWMS.

### Reports

You can generate activity history log reports for the following elements:

- Container: Shows all activity logged for a selected container and date range.
- Item: Shows all activity logged for a selected item.
- Location: Shows all activity logged for a selected location and date range.
- Stock order: Shows all activity logged for a selected customer order.
- User: Shows all activity logged for a selected user and date range.

### System Administration

For activities to be logged, the activity history log functionality must be turned on. The setting for the system parameter, ahl_log, may be:

- 0 (zero): The functionality is turned off.
- 1: The functionality is turned on. Activities are written to the ACTIVITY_LOG table.
- 2: The functionality is turned on. Activities are written to an Oracle database queue. Customization is required to write the data to the ACTIVITY_LOG table.

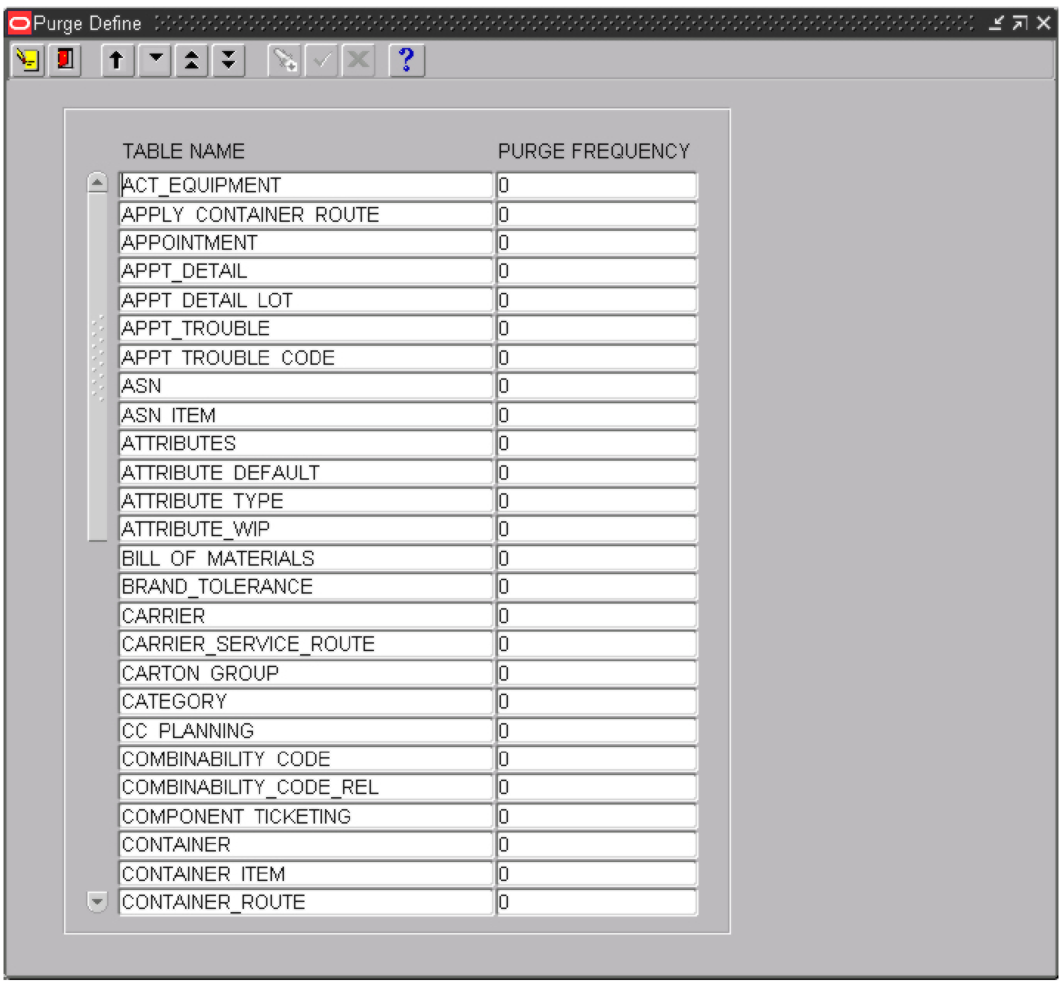
# Automatic Overrides and Skips

The following user actions are always recorded in the activity history log:

- During the putaway process, a suggested putaway location is overridden.
- During bulk picking or bulk replenishment picking, a suggested pick from location or quantity is overridden.
- During container picking, a suggested location or quantity is overridden.
- During container replenishment picking, a suggested location is overridden.
- During put-to-store picking, a suggested location is overridden.
- During cycle counting, a location marked for counting is skipped.

# Maintain Purge Frequencies

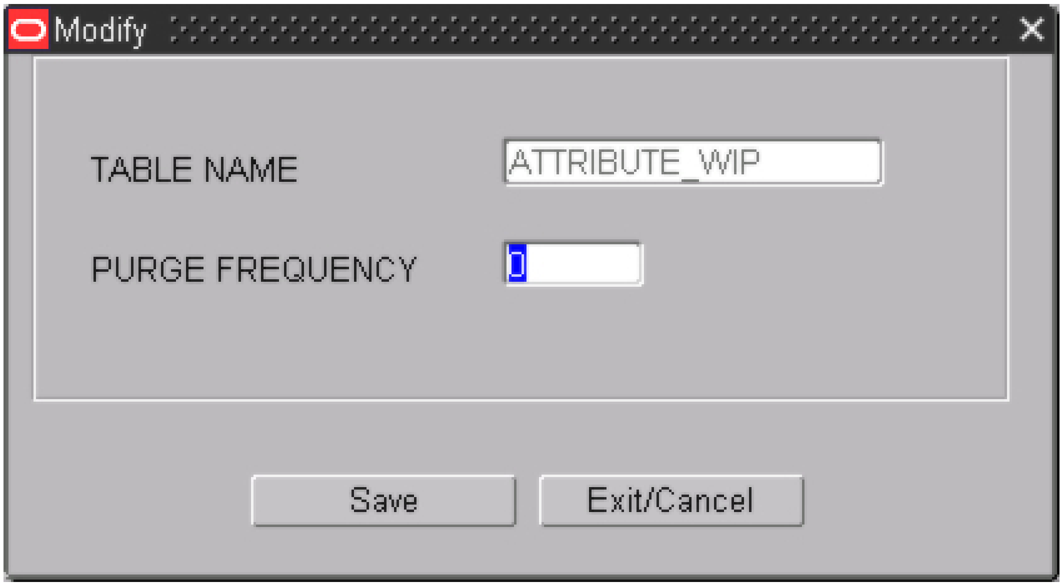
**Navigate:** From the main menu, select Activity History Log > Define Purge. The current purge settings appear in the Purge Define window.




**Purge Define Window**

## Edit Purge Frequencies

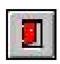
1. On the Purge Define window, double-click the table that you want to edit. The Modify window opens.




**Modify Window**

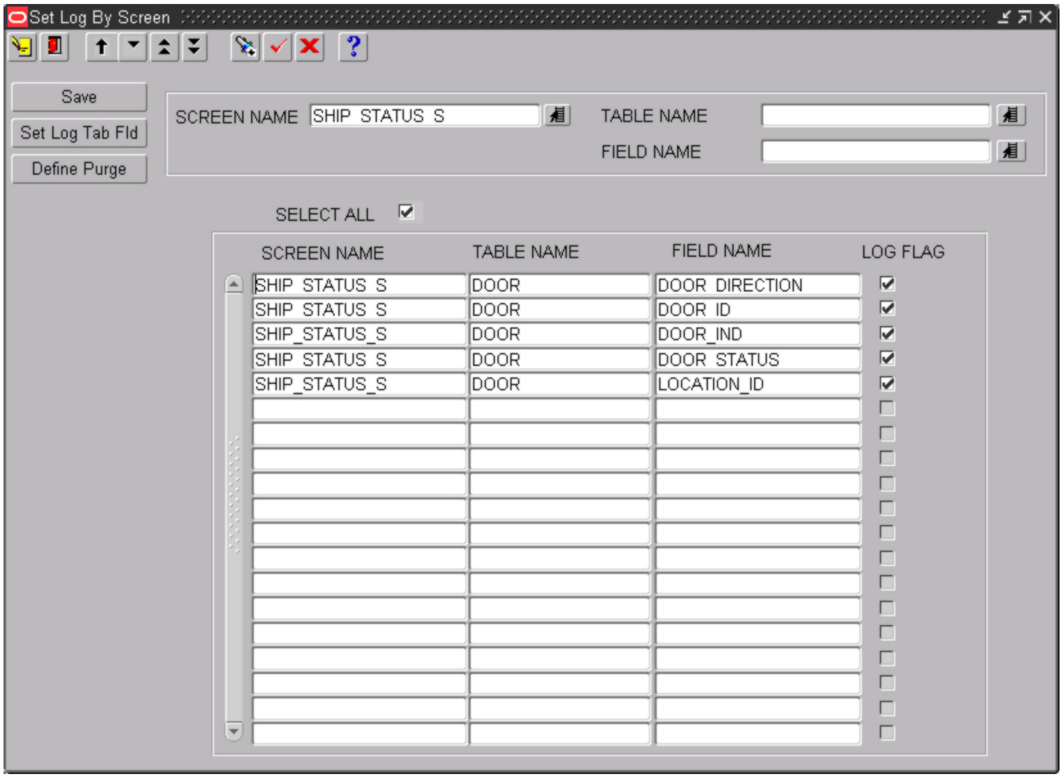
2. In the Purge Frequency field, edit the number of days for which you want to retain data.
3. Click **Save** to save any changes and close the Modify window.

## Exit the Purge Define Window

- Click the exit  button to close the window.

# Log Activity History by Screen

**Navigate:** From the main menu, select Activity History Log > Set Log by Screen. The Set Log by Screen window opens.




**Set Log by Screen Window**

## Display Tables and Fields for All Screens

**Note:** Due to the large volume of fields that would be retrieved, it is recommended that you enter criteria in order to restrict the results.

- Click the execute query  button.

## Display a Subset of Screens

1. If any screens are currently displayed, click the clear button.
2. Click the enter query button.
3. To display tables and fields by screen (or window), enter the screen name in the Screen Name query field, or click the LOV button and select the Screen.
   To display screens by table or field, enter the table name or field name in the appropriate query fields, or click the LOV buttons and select the table or field.
4. Click the execute query button. The screens, tables, and fields that match the criteria appear.

## Set Screen Level Activity Logs

1. On the Set Log by Screen window, select the Log Flag check box next to each screen/table/field that you want to include in the activity history log.
2. Clear the Log Flag check box next to each screen/table/field that you do not want to log.

   **Note:** To select or clear the Log Flag check boxes for all the currently displayed screen/table/field records, select or clear the Select All check box.

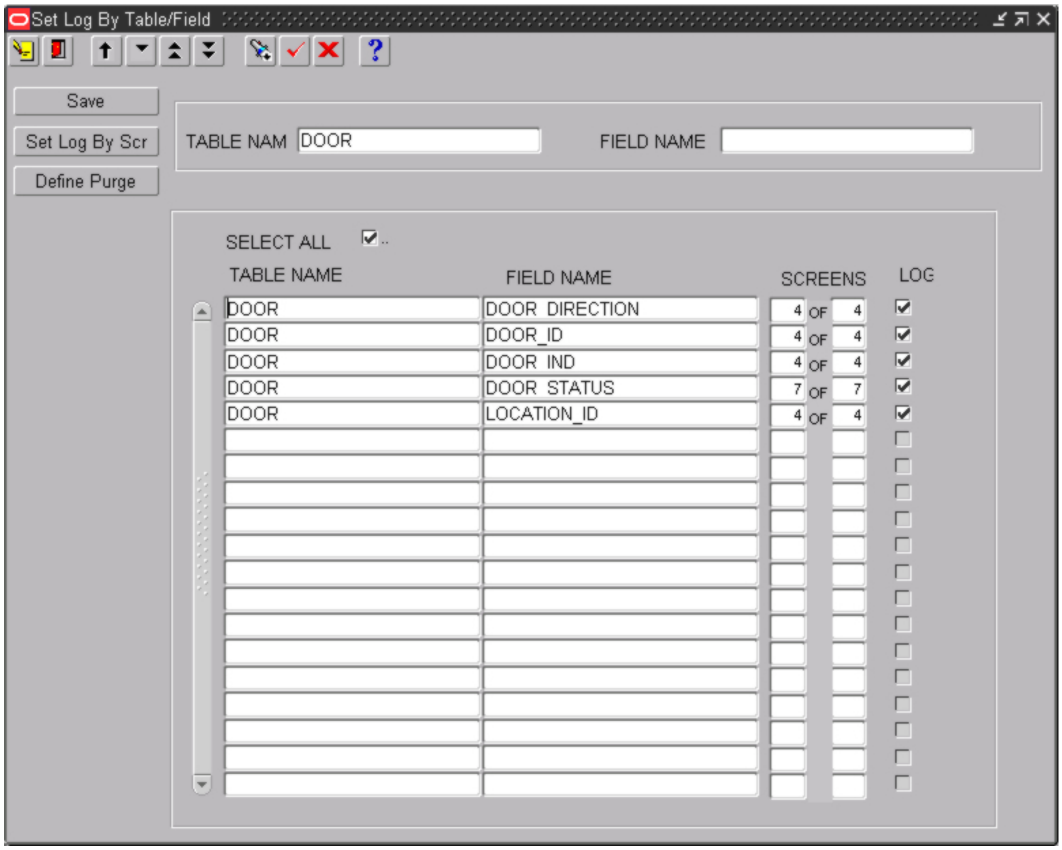
3. Click **Save** to save any changes.

## Exit the Set Log by Screen Window

- Click the exit button to close the window.

# Log Activity History by Table/Field

**Navigate:** From the main menu, select Activity History Log > Set Log by Table/Field. The Set Log by Table/Field window opens.




**Set Log by Table/Field Window**

## Display All Tables and Fields

**Note:** Due to the large volume of fields that would be retrieved, it is recommended that you enter criteria in order to restrict the results.

- Click the execute query  button.

## Display a Subset of Tables and Fields

1. If any tables and fields are currently displayed, click the clear  button.
2. Click the enter query  button.
3. Enter criteria in one or both of the query fields.
4. Click the execute query  button. The tables and fields that match the criteria appear.

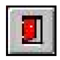
## Set Table/Field Level Activity Logs

1. On the Set Log by Table/Field window, select the Log Flag check box next to each table/field that you want to include in the activity history log.
2. Clear the Log Flag check box next to each screen/table/field that you do not want to log.

> **Note:** To select or clear the Log Flag check boxes for all the currently displayed table/field records, select or clear the Select All check box.

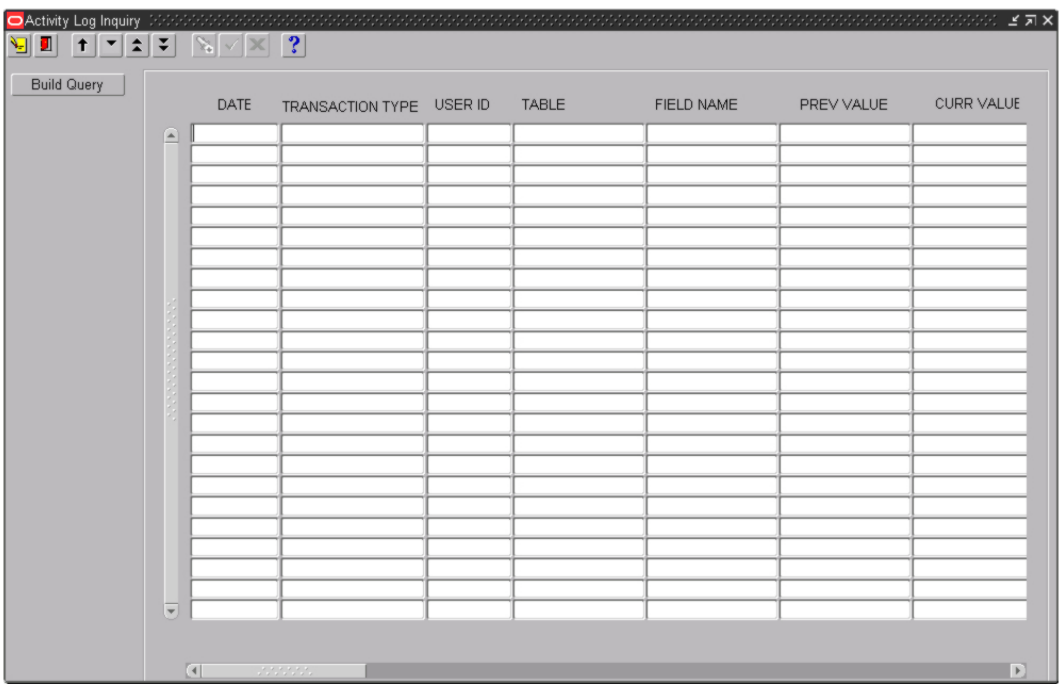
3. Click **Save** to save any changes.

## Exit the Set Log by Table/Field Window

- Click the exit  button to close the window.

# View the Activity History Log

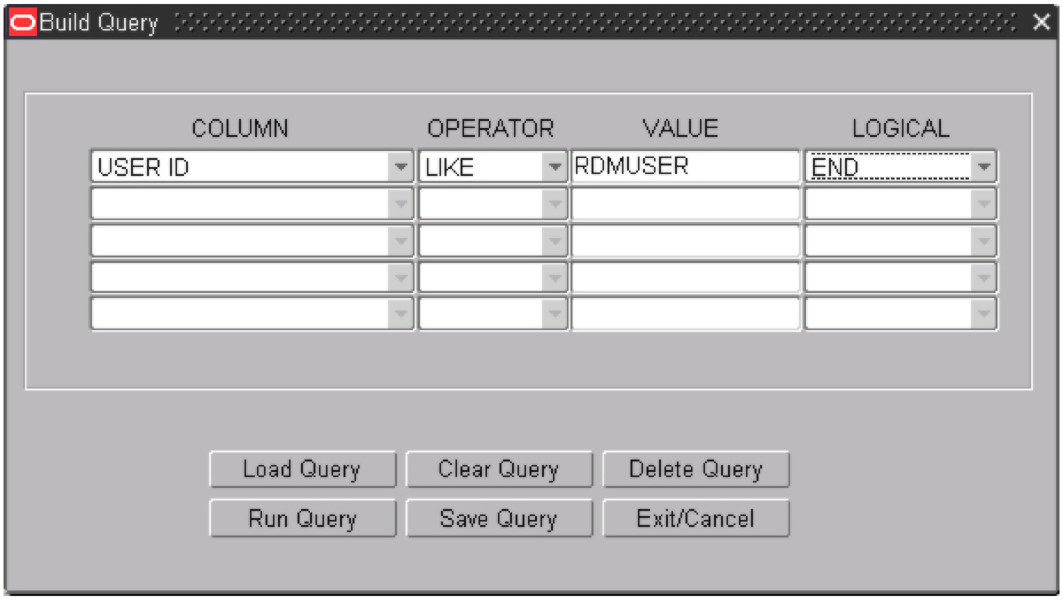
**Navigate:** From the main menu, select Activity History Log > Activity Log Inquiry. The Activity Log Inquiry window opens.




**Activity Log Inquiry Window**

## Query the Activity History Log

1. On the Activity Log Inquiry window, click **Build Query**. The Build Query window opens.




**Build Query Window**

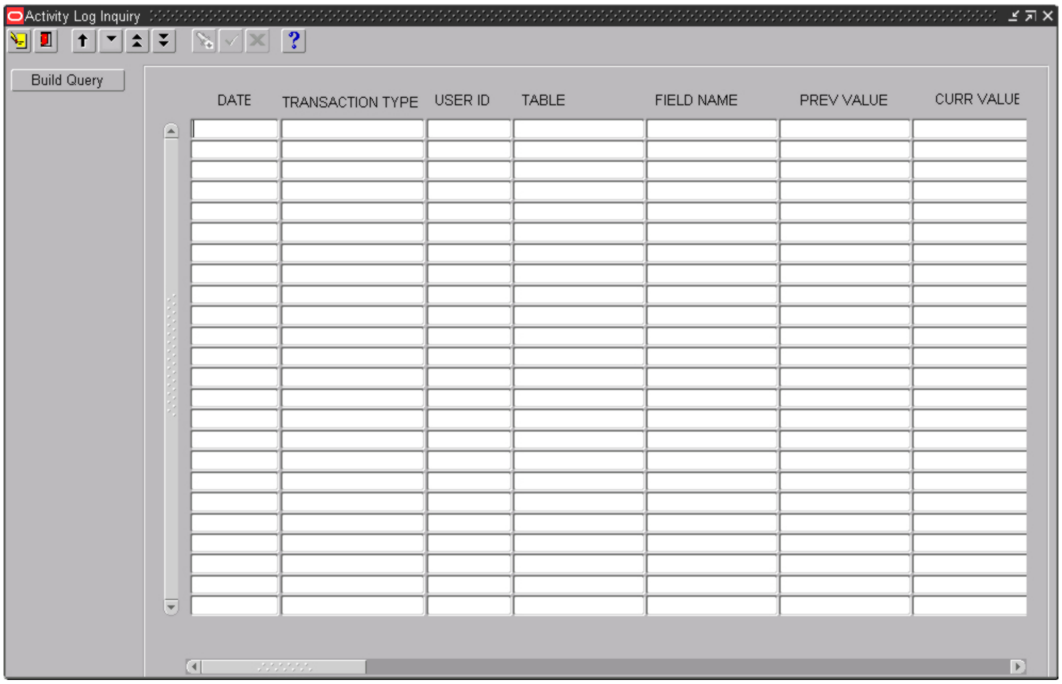
2. If a query opens, click **Clear Query**.
3. To load a query:
   a. Click **Load Query**. The Activity Log Queries window opens.
   b. Select the query that you want to use.
   c. Click **Load Query**. The query opens on the Build Query window.
4. Click **Run Query**. The query is run and the results appear on the Activity Log Inquiry window.

## Build a Query

1. On the Activity Log Inquiry window, click **Build Query**. The Build Query window opens.
2. In the Column field, select a limiting element.
3. In the Operator field, select a relational operator.
4. In the Value field, enter the value of the element selected in the Column field.
5. In the Logical field, enter the logical operator used to join two or more conditions.
6. Enter additional conditions as necessary.
7. To save a query:
   a. Click **Save Query**. The Activity Log Queries window opens.
   b. In the Save field, enter a name for the query.
   c. Click **Save** to save the query and close the Activity Log Queries window.
8. On the Build Query window, click **Run Query** to run the query or **Exit/Cancel** to close the Build Query window.

## Delete a Query

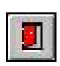
1. On the Activity Log Inquiry window, click **Build Query**. The Build Query window opens.
2. Click **Delete Query**. The Activity Log Queries window opens.




**Activity Log Queries Window**

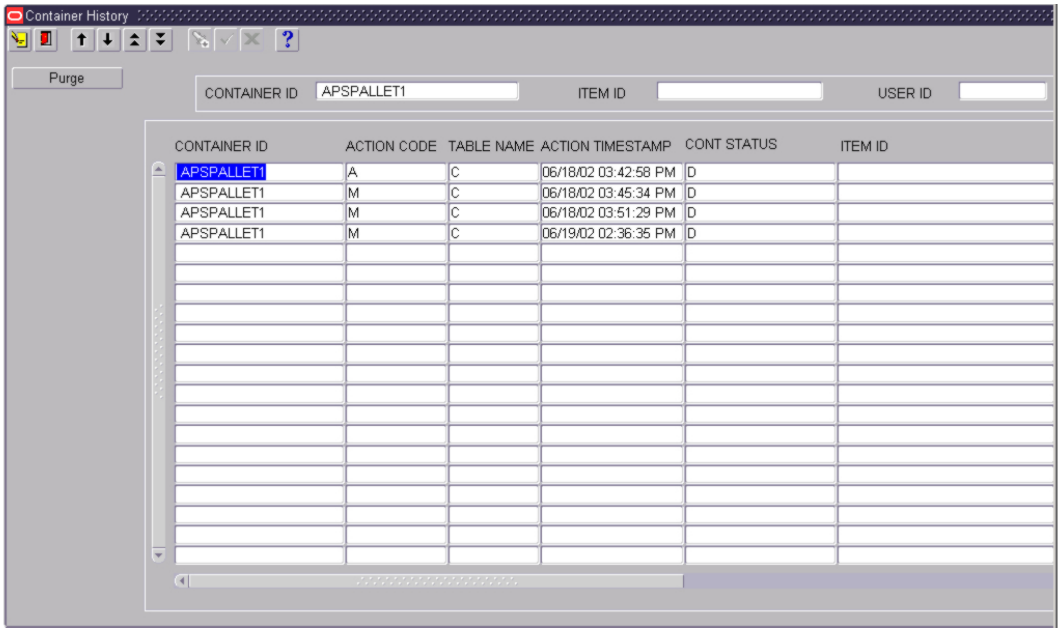
3. Select the query that you want to delete.
4. Click **Delete Query**.
5. When prompted to delete the record, click **Yes**. The query is deleted and you are returned to the Build Query window.
6. Click **Exit/Cancel** to close the Build Query window.

## Exit the Activity History Log Window

- Click the exit  button to close the window.

# Monitor Container History

**Navigate:** From the main menu, select Inventory Management > Container History. The Container History window opens.




**Container History Window**

## Display all Historical Records

**Note:** Due to the large volume of records that might be retrieved, it is recommended that you enter criteria in order to restrict the results.

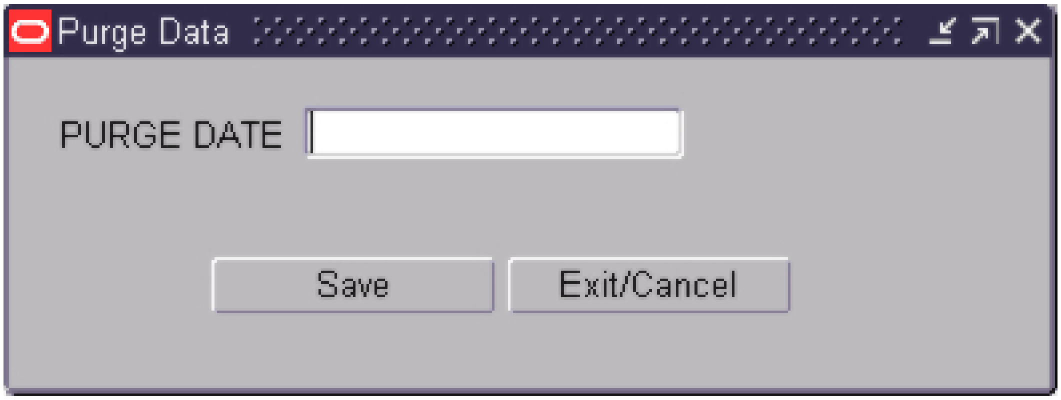
- Click the execute query  button.

## Display a Subset of Historical Records

1. If any records are currently displayed, click the clear  button.
2. Click the enter query  button.
3. Enter criteria in one or more of the query fields.
4. Click the execute query  button. The historical records that match the criteria appear.

## Purge Historical Records

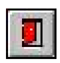
1. On the Container History window, click **Purge**. The Purge Data window opens.




**Purge Data Window**

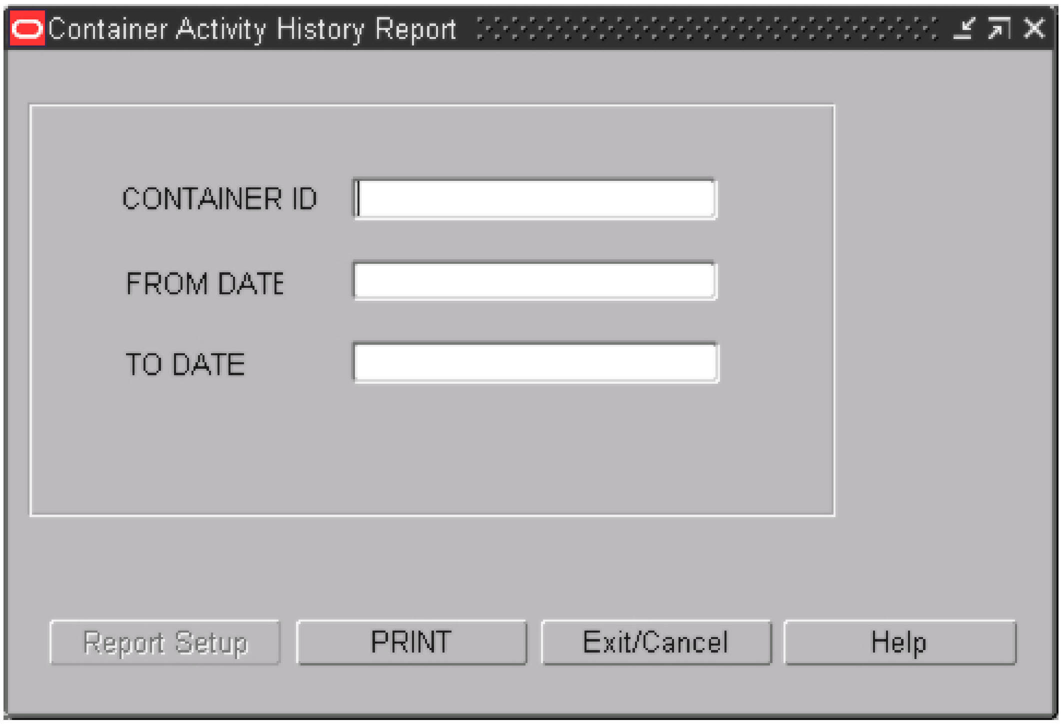
2. In the Purge Date field, enter an action date. All records with an action date equal to or less than the selected action date are included in the purge request.
3. Click **Save** to enter the purge request and close the Purge Data window.

## Exit the Container History Window

- Click the exit  button to close the window.

## Generate the Activity History Log for Container ID Report

**Navigate:** From the main menu, select Activity History Log > Reports > Container. The Container Activity History Report window opens.

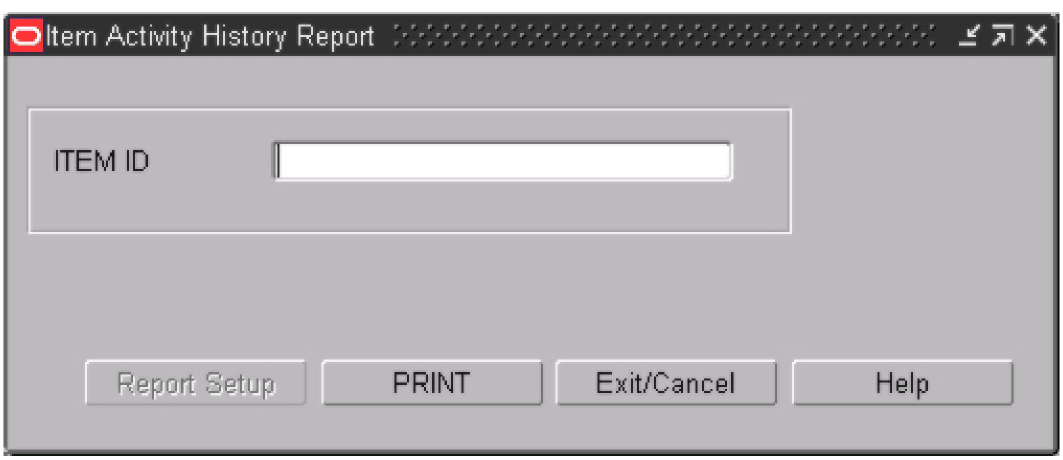



**Container Activity History Report Window**

1. In the Container ID field, enter the container ID for which you want a report.
2. In the From Date and To Date fields, enter the range of dates to include in the report.
3. Click **Print**. The report is sent to the default destination.

## Generate the Activity History Log for Item ID

**Navigate:** From the main menu, select Activity History Log > Reports > Item. The Item Activity History Report window opens.

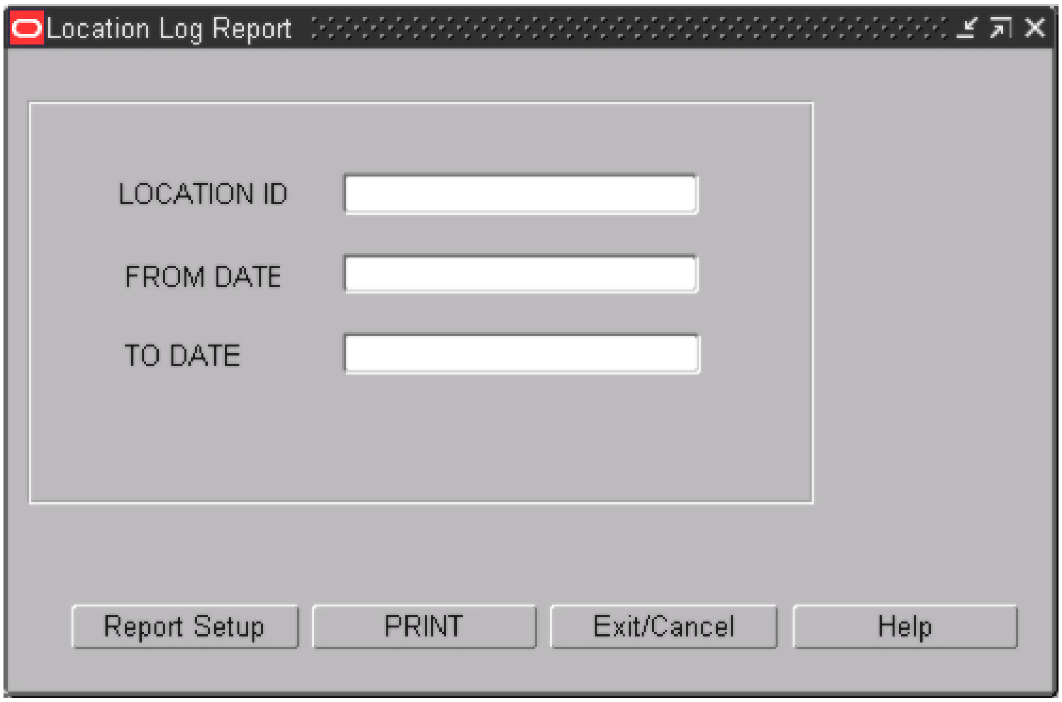



**Item Activity History Report Window**

1. In the Item ID field, enter the item ID for which you want a report.
2. Click **Print**. The report is sent to the default destination.

## Generate the Activity History Log for Location ID Report

**Navigate:** From the main menu, select Activity History Log > Reports > Location. The Location Log Report window opens.

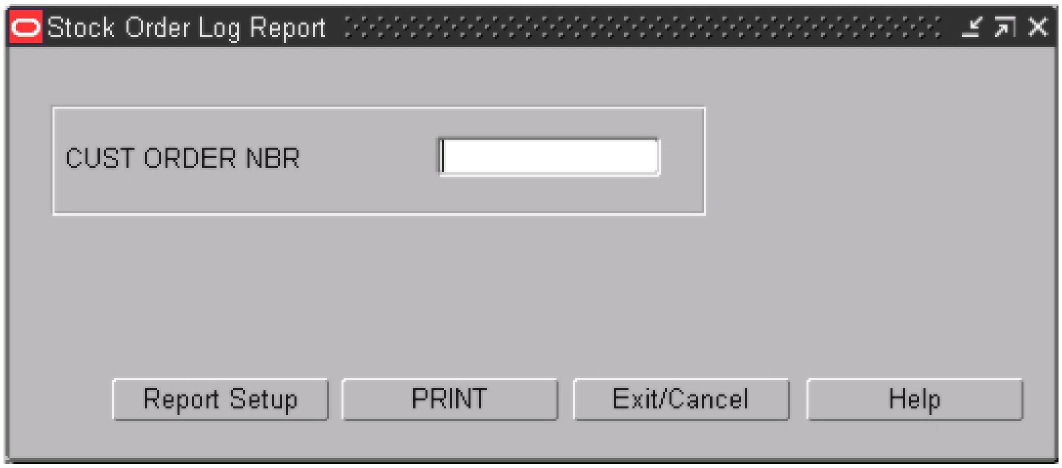



**Location Log Report Window**

1. In the Location ID field, enter the location ID for which you want a report.
2. In the From Date and To Date fields, enter the range of dates to include in the report.
3. Click **Print**. The report is sent to the default destination.

# Generate the Activity History Log for Stock Order Nbr Report

**Navigate:** From the main menu, select Activity History Log > Reports > Stock Order. The Stock Order Log Report window opens.

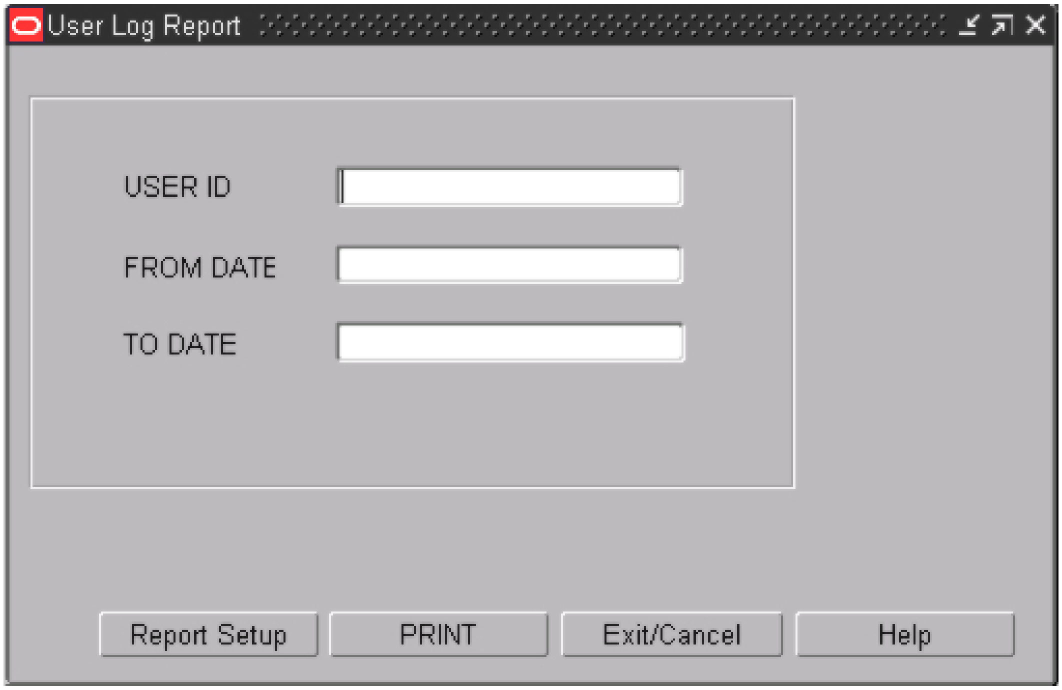



**Stock Order Log Report Window**

1. In the Cust Order Nbr field, enter the customer order number for which you want a report.
2. Click **Print**. The report is sent to the default destination.

# Generate the Activity History Log for User ID Report

**Navigate:** From the main menu, select Activity History Log > Reports > User. The User Log Report window opens.




**User Log Report Window**

1. In the User ID field, enter the user ID for which you want a report.
2. In the From Date and To Date fields, enter the range of dates to include in the report.
3. Click **Print**. The report is sent to the default destination.

# 11

# Support Functions

## Support Functions Overview

The support functions modules are the heart of the system. They assist system administrators and users with high privilege levels in maintaining specifications for every integral part of the distribution center.

The modules found under the support functions umbrella are:

**Administration setup**

Used to configure system level functions, such as facilities, menus, print queues, system parameters, translations, user messages, users, and working days.

**DC setup**

Used to set up the physical layout and container types in the distribution center. This includes defining DC departments, regions, work areas, zones, zone groups, and locations. Some types of locations, such as doors, forward pick locations, and put to store locations, require additional details. Common characteristics of locations may be defined at the location type level. Location classes can be used to group locations with similar defaults, processes, and equipment types. Unit pick systems can be set up and putaway plans can be defined.

**Equipment/zone setup**

Used to set up equipment classes and zone groups. Zones and equipment are identified. Equipment classes are assigned to zones.

**Item setup**

Used to set up attribute types, attributes, and attribute WIPs. Indicate whether item fields are owned by the host system or the DC. Define the default characteristics and attributes for items at the department, class, subclass, or vendor style level. Item classes can be used to group items with similar defaults, processes, and equipment classes. Items may be entered manually. Vendor audits and addresses may be maintained. SKU profiles may be transmitted to a third party system.

**Processing/returns setup**

Used to set up codes that are required in order to process returns and value added services. The codes include trouble codes, disposition codes, reason codes for inventory adjustments, return codes, and WIP codes. Processes are set up which define how tasks are presented to users and how users must record their activities. Cycle count plans, generic labels, and label reprints are maintained in this module.

**User/task setup**

Used to set up the rules that allow RWMS to automatically assign tasks to users. Define user classes, users, activities, and service standards. Assign users to task groups and monitor task assignments. Review labor productivity.

**Transportation setup**

Used to identify shipping destinations, carriers, trailers, routes, route days, route destinations, and carrier service routes. You can also view a summary of route assignments by day.

# Administration Setup

System administration tasks are performed by system administrators or users with a high privilege level.

## Business Process

The administration setup module allows you to set up parameters that affect the entire system. You can set up the following:

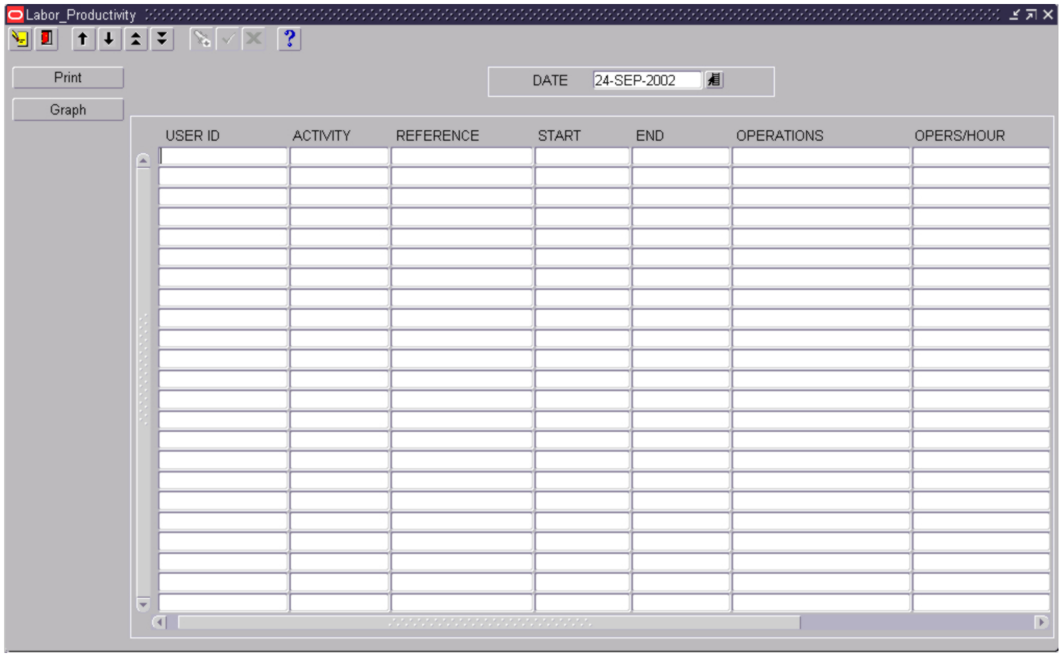
- System parameters: Determine which features should be operational and enter the default settings for various areas of the system.
- Facilities: Create or copy the environments in which users must work.
- Translations: Identify the supported languages. Translate menu options, field labels, and user messages.
- Currencies and tickets: Identify and set up the format for currencies. Identify the ticket types, their printer queues, and default print quantities.
- Codes: Translate inventory disposition codes, stock order upload codes, and transaction codes in order to make them compatible with host systems.
- Printers and reports: Identify the types of output devices that are available to the system. Set default parameters for generating reports.
- Work days: Identify the work days, non-work days, and hours of operation for the distribution center.
- Process configurations: Identify how processes may be presented to users. Set up label configurations which may be assigned to processes presented as Label. Review the function keys found on RF screens.

## Reports

There are no reports that pertain to administration setup.

# View Labor Productivity Data

**Navigate:** From the main menu, select Support Functions > User/Task Setup > Labor Productivity. The Labor Productivity window opens with the current system date in the Date query field.




**Labor Productivity window**

## Display Labor Productivity Data for the Default Date

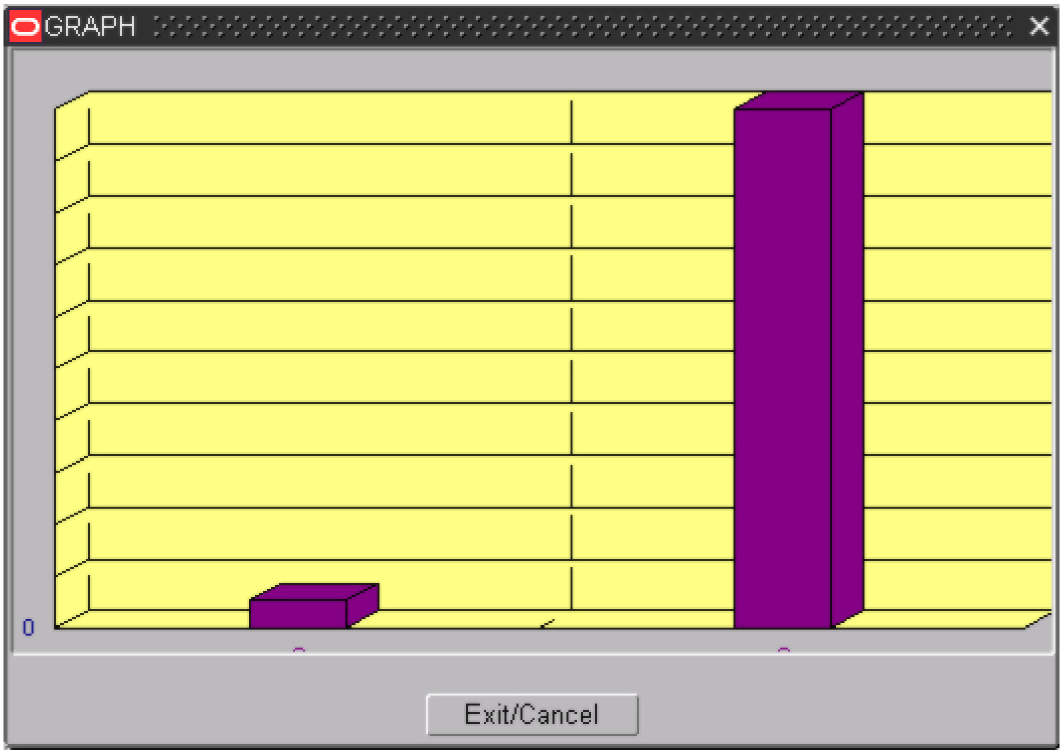
1. Click the execute query  button.

## Display Labor Productivity Data for any Other Date

1. If any labor productivity data are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Date query field, enter the date, or click the calendar  button and select the date.
4. Click the execute  query button. The labor productivity data for the selected date appear.

### Graph Labor Productivity Data

1. On the Labor Productivity window, click **Graph**. The data are presented graphically in the Graph window.

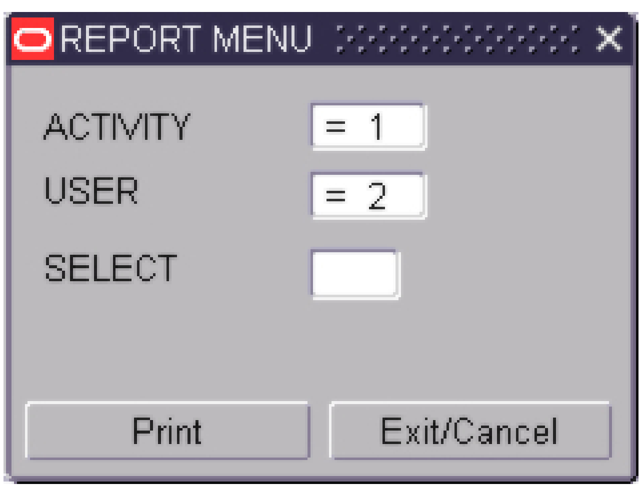



**Labor Productivity Graph window**

2. Click **Exit/Cancel** to close the window.

### Generate Labor Productivity Reports

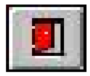
1. On the Labor Productivity window, click **Print**. The Report Menu window opens.




**Labor Productivity Report window**

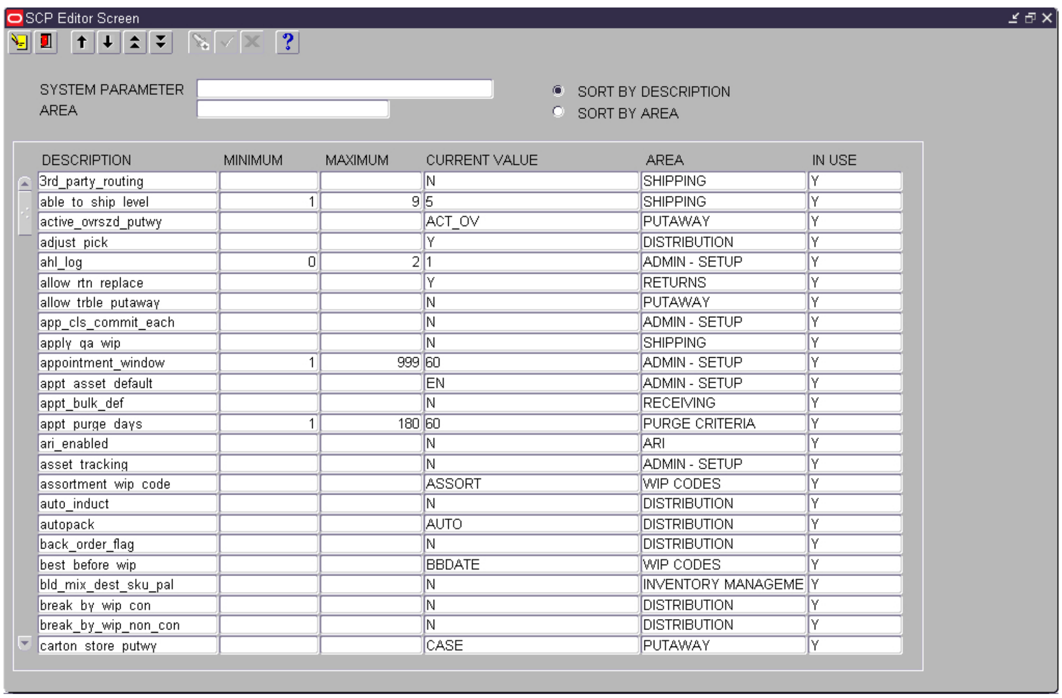
2. In the Select field, enter the number of the desired report.
   a. Enter 1 for the Activity Productivity Summary report.
   b. Enter 2 for the User Productivity Summary report.
3. Click **Print**. The appropriate Productivity Summary Report window opens.
4. In the Start Date and End Date fields, enter the range of dates that you want to include in the report.
5. Click the print  button. The report is sent to the default destination.

### Exit the Labor Productivity Window

- Click the exit  button to close the window.

## Maintain System Parameters

**Navigate:** From the main menu, select Support Functions > Administration Setup > System Parameters Editor. The SCP Editor Screen window opens.




| DESCRIPTION | MINIMUM | MAXIMUM | CURRENT VALUE | AREA | IN USE |
|---|---|---|---|---|---|
| 3rd_party_routing | | | N | SHIPPING | Y |
| able to ship level | 1 | 9 | 5 | SHIPPING | Y |
| active_ovrszd_putwy | | | ACT_OV | PUTAWAY | Y |
| adjust pick | | | Y | DISTRIBUTION | Y |
| ahl_log | 0 | 2 | 1 | ADMIN - SETUP | Y |
| allow rtn replace | | | Y | RETURNS | Y |
| allow trble putaway | | | N | PUTAWAY | Y |
| app_cls_commit_each | | | N | ADMIN - SETUP | Y |
| apply qa wip | | | N | SHIPPING | Y |
| appointment_window | 1 | 999 | 60 | ADMIN - SETUP | Y |
| appt asset default | | | EN | ADMIN - SETUP | Y |
| appt_bulk_def | | | N | RECEIVING | Y |
| appt purge days | 1 | 180 | 60 | PURGE CRITERIA | Y |
| ari_enabled | | | N | ARI | Y |
| asset tracking | | | N | ADMIN - SETUP | Y |
| assortment wip code | | | ASSORT | WIP CODES | Y |
| auto_induct | | | N | DISTRIBUTION | Y |
| autopack | | | AUTO | DISTRIBUTION | Y |
| back_order_flag | | | N | DISTRIBUTION | Y |
| best before wip | | | BBDATE | WIP CODES | Y |
| bld_mix_dest_sku_pal | | | N | INVENTORY MANAGEME | Y |
| break by wip con | | | N | DISTRIBUTION | Y |
| break_by_wip_non_con | | | N | DISTRIBUTION | Y |
| carton store putwy | | | CASE | PUTAWAY | Y |

**SCP Editor Screen Window**

### Display All System Parameters

1. Select the sort order:
   - Sort by Description: Sorts the system parameters in alphabetical order by description.
   - Sort by Area: Sorts the system parameters in alphabetical order by functional area.
2. Click the execute query  button. The system parameters appear in the selected sort order.

### Display System Parameters by Description or Functional Area

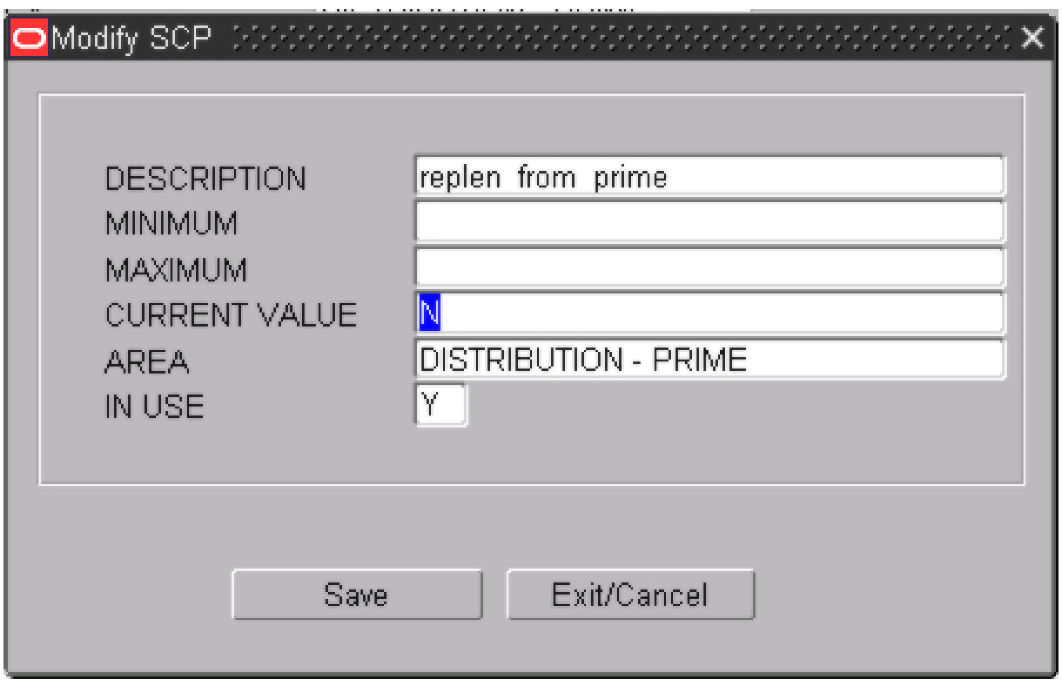
1. If any system parameters are currently displayed, click the clear button.
2. Click the enter query button.
3. To search for system parameters by:
   - Description: Enter all or part of the description in the System Parameter query field, or click the LOV button and select the system parameter.
   - Functional area: Enter all or part of the area name in the Area query field, or click the LOV button and select the area.

> **Note:** You can use the percent (%) symbol as a wildcard character.

4. Click the execute query button. The system parameters that match the search criterion appear.

### Edit System Parameters

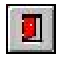
1. On the SCP Editor Screen window, double-click the system parameter that you want to edit. The Modify SCP window opens.




**Modify SCP Window**

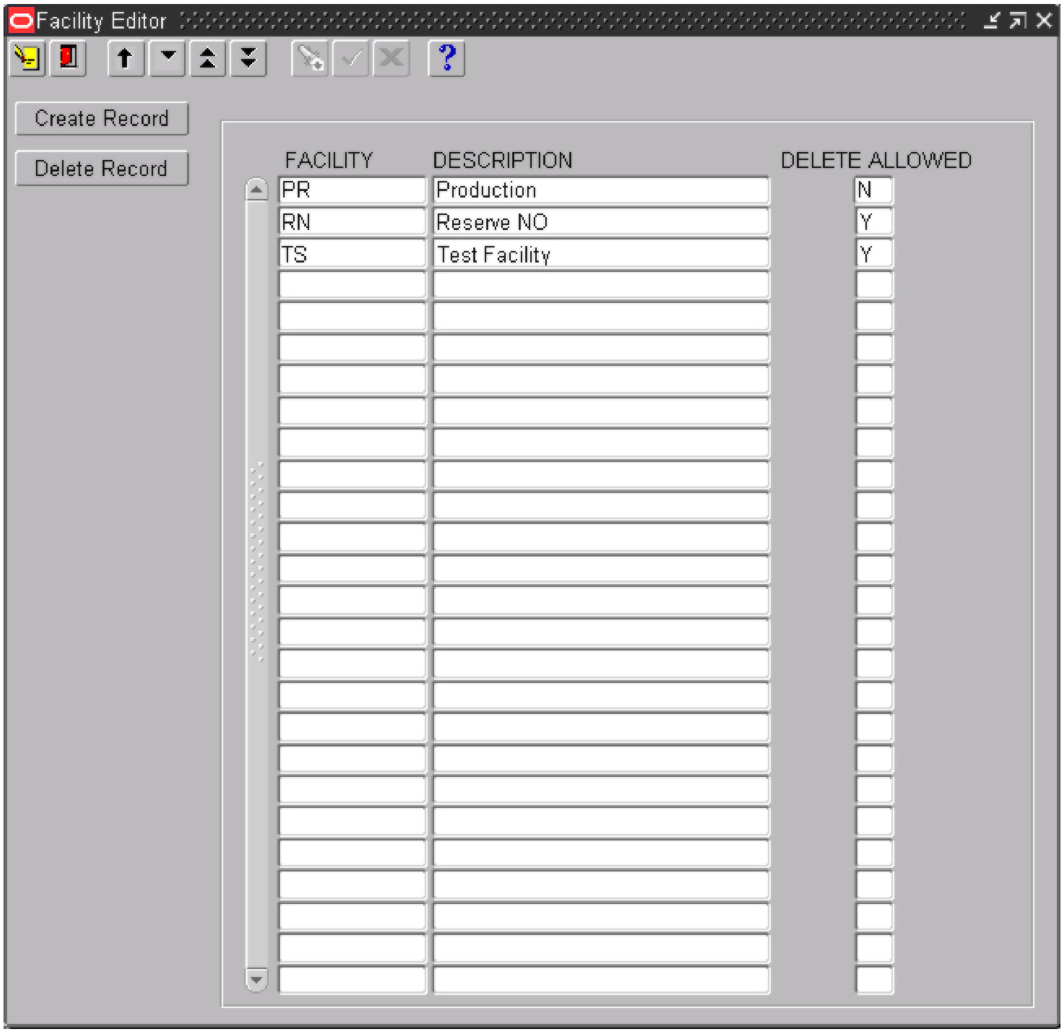
2. Edit the current value and functional area as necessary.
3. In the In Use field, enter Y (Yes) to turn on or N (No) to turn off a system parameter as necessary.
4. Click **Save** to save any changes and close the Modify SCP window.

### Exit the SCP Editor Screen Window

- Click the exit  button to close the window.

## Maintain Facilities

**Navigate:** From the main menu, select Support Functions > Administration Setup > Facility Copy Editor. The current facilities appear in the Facility Editor window.




**Facility Editor Window**

### Edit a Facility

1. On the Facility Editor window, double-click the facility that you want to edit. The Modify window opens.

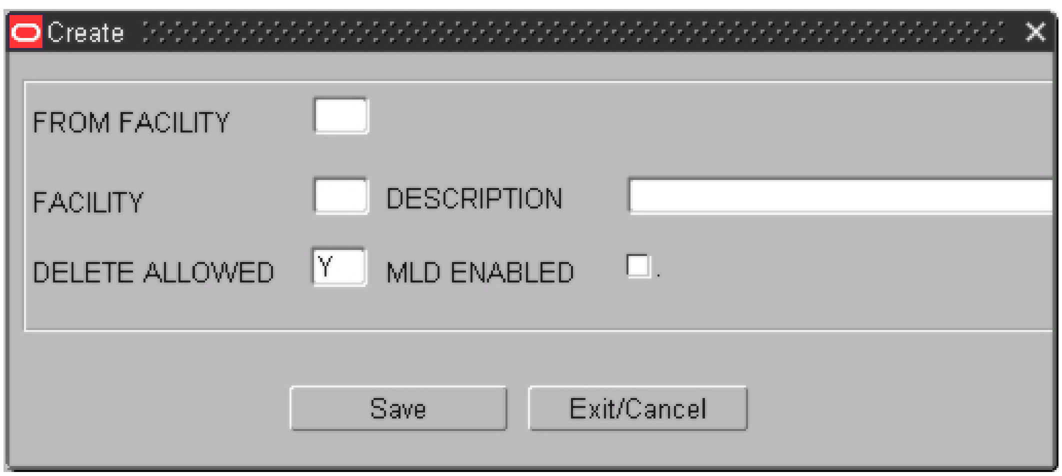

**Modify Window**

2. Edit the description as necessary.
3. Click **Save** to save the change and close the Modify window.

### Add a Facility

> **Note:** At least one facility must already be set up in the system, as new facilities are copied from an existing facility.

1. On the Facility Editor window, click **Create Record**. The Create window opens.




**Create Window**

2. In the From Facility field, enter the ID of the facility to be copied.
3. In the Facility and Description fields, enter the ID and name of the new facility.
4. In the Delete Allowed field, enter Y (Yes) if the facility may be deleted. Otherwise, enter N (No).
5. Select the MLD Enable check box if the facility is to be enabled for multi-level distribution (MLD).

---

**Note:** The system parameter that enables multi-level distribution functionality must be set to Y (Yes) in order to use this option.

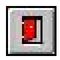
---

6. Click **Save** to save the changes and close the Create window.

### Delete a Facility

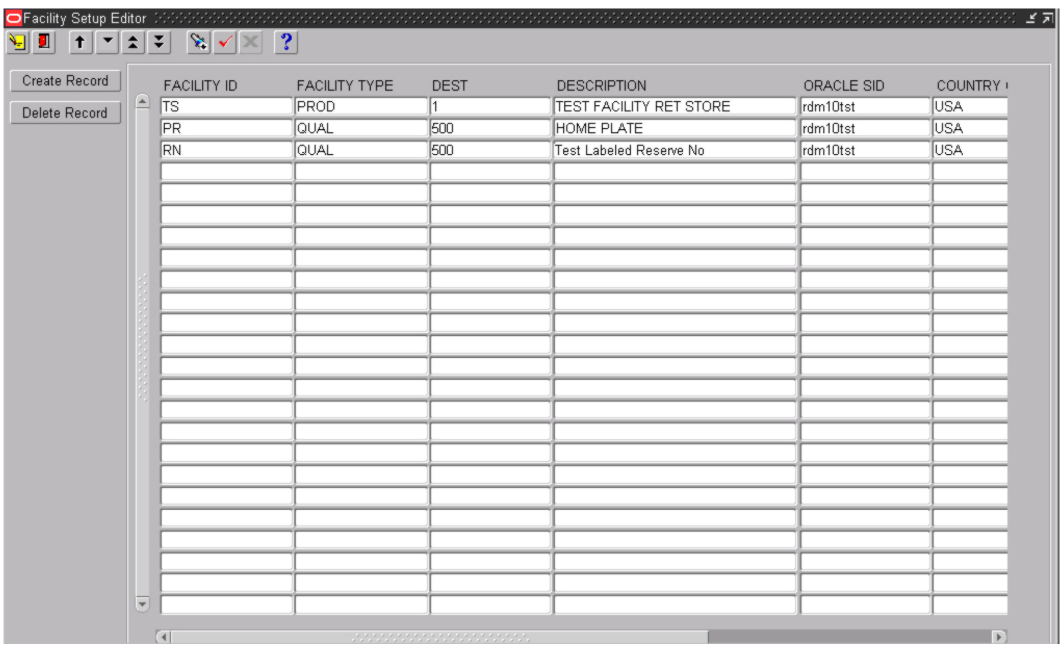
1. On the Facility Editor window, select the facility that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Facility Editor Window

- Click the exit  button to close the window.

## Maintain Transshipment Facilities

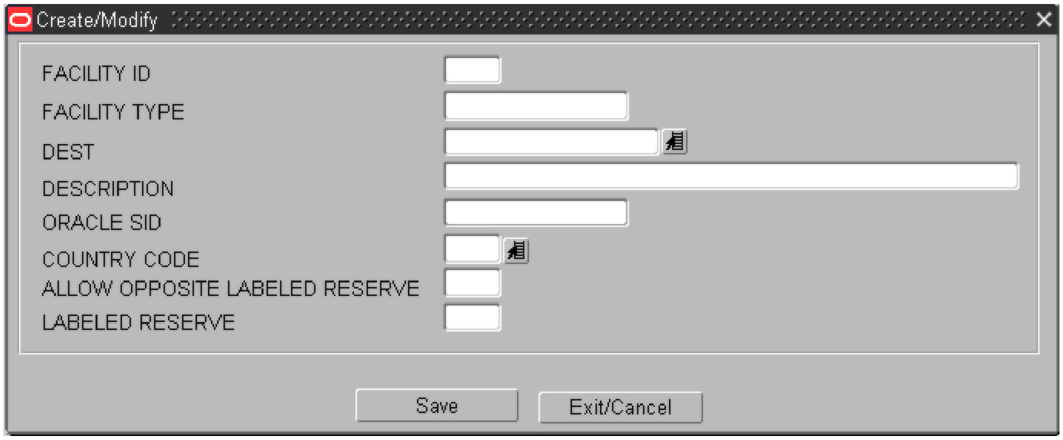
**Navigate:** From the main menu, select Support Functions > Administration Setup > Facility Setup Editor. The current facilities appear in the Facility Setup Editor window.




**Facility Setup Editor Window**

### Edit a Facility

1. On the Facility Setup Editor window, double-click the facility that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Facility

1. On the Facility Setup Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Facility field, enter the ID of the facility.
3. In the Facility Type field, enter the code for the type of facility.
4. In the Dest field, enter the destination ID of the distribution center, or click the LOV button and select the destination.
5. In the Description field, enter a description of the facility.
6. In the Oracle SID field, enter the Oracle system ID of the facility.
7. In the Country Code field, enter the code for the country in which the facility is located, or click the LOV button and select the country.
8. In the Allow Opposite Labeled Reserve field, enter Y (Yes) or N (No) to indicate whether the facility accepts shipments from a facility that uses opposite labeled reserve.
9. In the Labeled Reserve field, enter Y (Yes) or N (No) to indicate whether the facility uses labeled reserve functionality.
10. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Facility

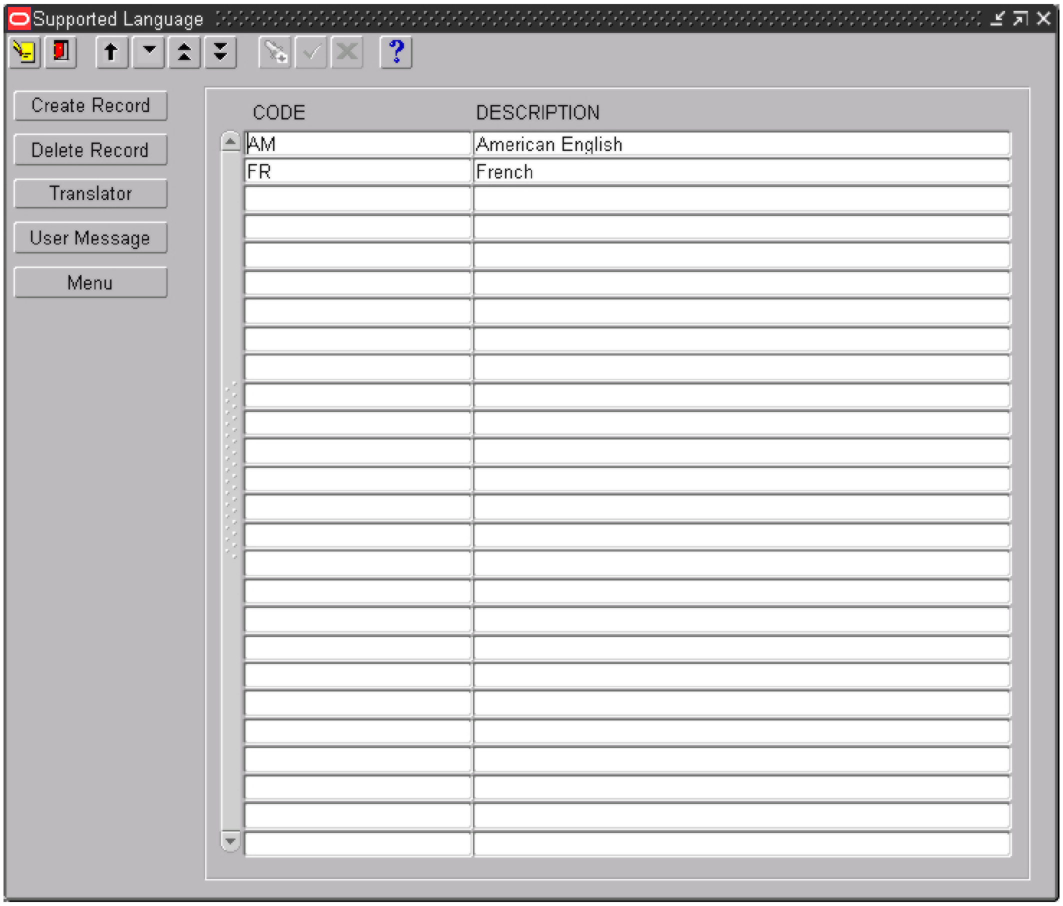
1. On the Facility Editor window, select the facility that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Facility Editor Window

- Click the exit button to close the window.

# Maintain Language Codes

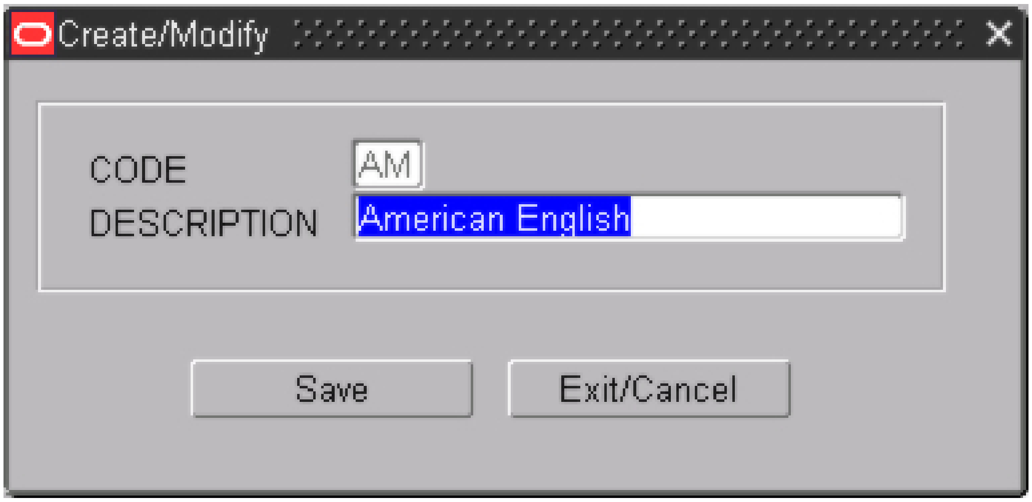
**Navigate:** From the main menu, select Support Functions > Administration Setup > Supported Language Editor. The current language codes appear in the Supported Language window.




**Supported Language Window**

## Edit a Language Code

1. On the Supported Language window, double-click the language code that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

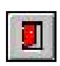
### Add a Language Code

1. On the Supported Language window, click **Create Record**. The Create/Modify window opens.
2. In the Code field, enter the standard code for the language.
3. In the Description field, enter the name of the language.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Language Code

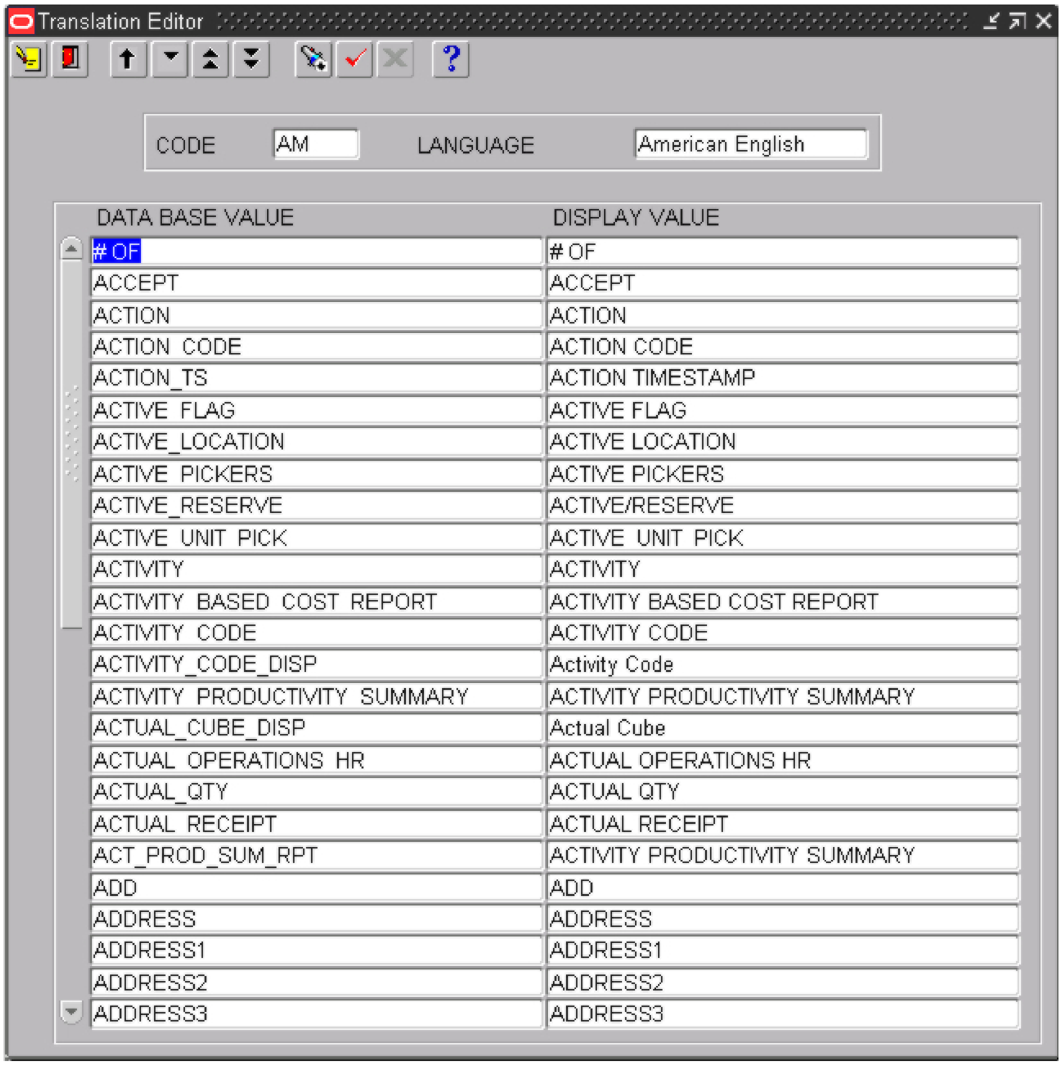
1. On the Supported Language window, select the language code that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Supported Language Window

- Click the exit  button to close the window.

## Maintain Translations of Field Labels

**Navigate:** From the main menu, select Support Functions > Administration Setup > Translation Editor. The Translation Editor window opens.




**Translation Editor Window**

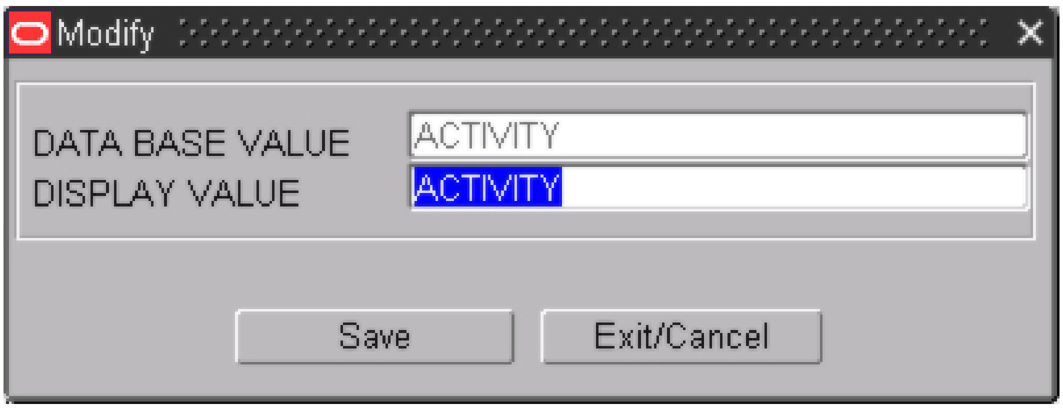
**Note:** You can also access this window from the Supported Language window.

### Display the Field Labels

1. If any values are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Code query field, enter the code for the language, or click the LOV button and select the language.
4. Click the execute query button. The values associated with the selected language appear.

### Edit a Translation

1. On the Translation Editor window, double-click the value that you want to edit. The Modify window opens.




**Modify Window**

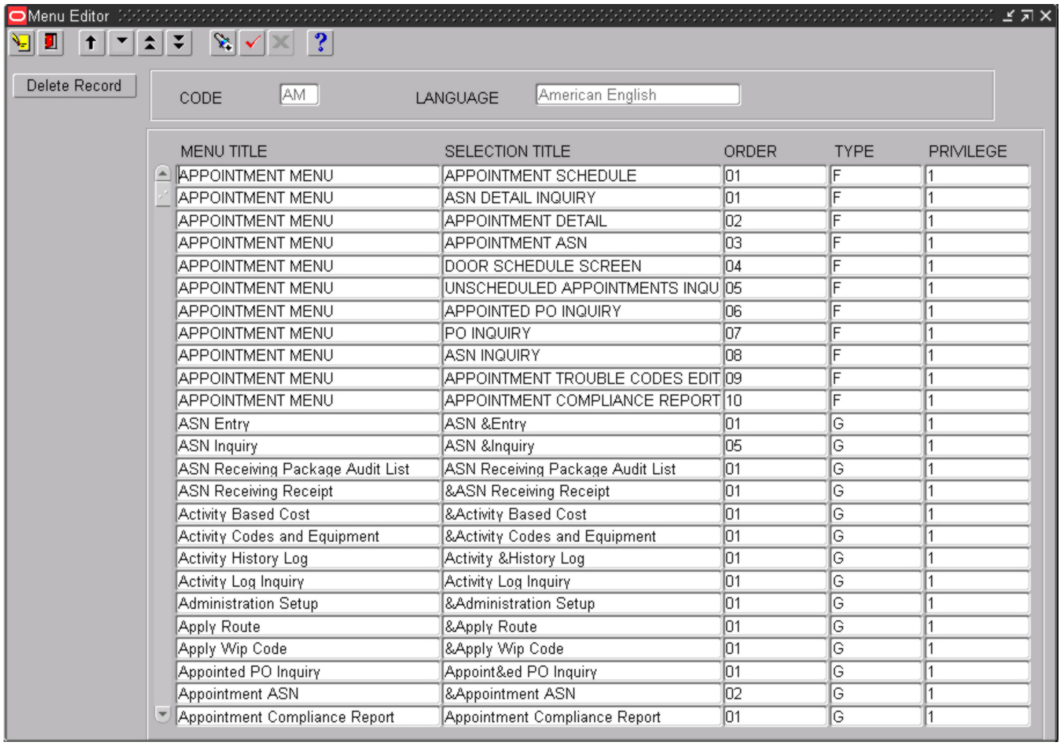
2. Edit the value as necessary.
3. Click **Save** to save any changes and close the Modify window.

### Exit the Translation Editor Window

- Click the exit button to close the window.

## Maintain Translations of Menu Options

**Navigate:** From the main menu, select Support Functions > Administration Setup > Menu Editor. The menu options appear in the Menu Editor window.




| MENU TITLE | SELECTION TITLE | ORDER | TYPE | PRIVILEGE |
|---|---|---|---|---|
| APPOINTMENT MENU | APPOINTMENT SCHEDULE | 01 | F | 1 |
| APPOINTMENT MENU | ASN DETAIL INQUIRY | 01 | F | 1 |
| APPOINTMENT MENU | APPOINTMENT DETAIL | 02 | F | 1 |
| APPOINTMENT MENU | APPOINTMENT ASN | 03 | F | 1 |
| APPOINTMENT MENU | DOOR SCHEDULE SCREEN | 04 | F | 1 |
| APPOINTMENT MENU | UNSCHEDULED APPOINTMENTS INQU | 05 | F | 1 |
| APPOINTMENT MENU | APPOINTED PO INQUIRY | 06 | F | 1 |
| APPOINTMENT MENU | PO INQUIRY | 07 | F | 1 |
| APPOINTMENT MENU | ASN INQUIRY | 08 | F | 1 |
| APPOINTMENT MENU | APPOINTMENT TROUBLE CODES EDIT | 09 | F | 1 |
| APPOINTMENT MENU | APPOINTMENT COMPLIANCE REPORT | 10 | F | 1 |
| ASN Entry | ASN &Entry | 01 | G | 1 |
| ASN Inquiry | ASN &Inquiry | 05 | G | 1 |
| ASN Receiving Package Audit List | ASN Receiving Package Audit List | 01 | G | 1 |
| ASN Receiving Receipt | &ASN Receiving Receipt | 01 | G | 1 |
| Activity Based Cost | &Activity Based Cost | 01 | G | 1 |
| Activity Codes and Equipment | &Activity Codes and Equipment | 01 | G | 1 |
| Activity History Log | Activity &History Log | 01 | G | 1 |
| Activity Log Inquiry | Activity Log Inquiry | 01 | G | 1 |
| Administration Setup | &Administration Setup | 01 | G | 1 |
| Apply Route | &Apply Route | 01 | G | 1 |
| Apply Wip Code | &Apply Wip Code | 01 | G | 1 |
| Appointed PO Inquiry | Appoint&ed PO Inquiry | 01 | G | 1 |
| Appointment ASN | &Appointment ASN | 02 | G | 1 |
| Appointment Compliance Report | Appointment Compliance Report | 01 | G | 1 |

**Menu Editor Window**

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**Note:** You can also access this window from the Supported Language window.

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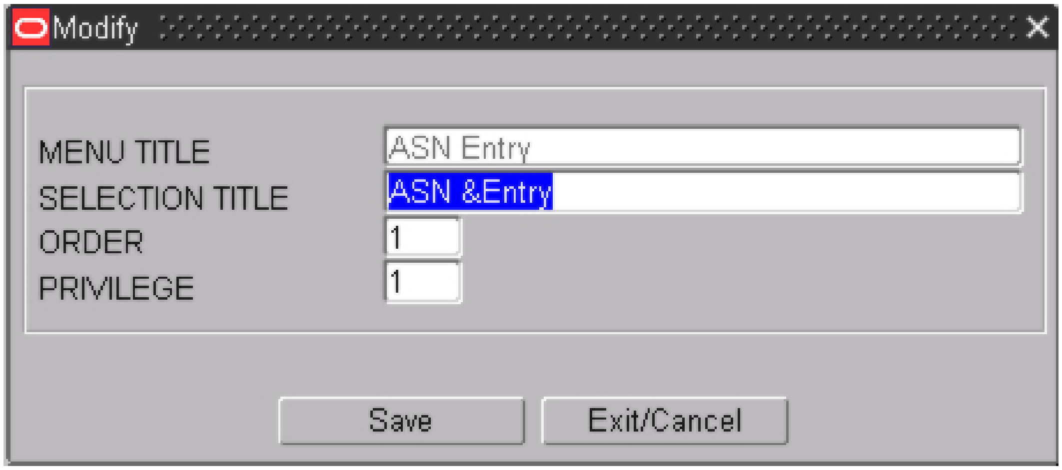
### Display the Menu Options

1. If any menu options are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Code query field, enter the code for the language, or click the LOV  button and select the language.
4. Click the execute query  button. The menu options associated with the selected language appear.

### Edit a Translation

1. On the Menu Editor window, double-click the menu option that you want to edit. The Modify window opens.



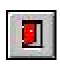

**Modify Window**

2. Edit the title, its order on the menu, and its user privilege level as necessary.
3. Click **Save** to save any changes and close the Modify window.

### Delete a Menu Option

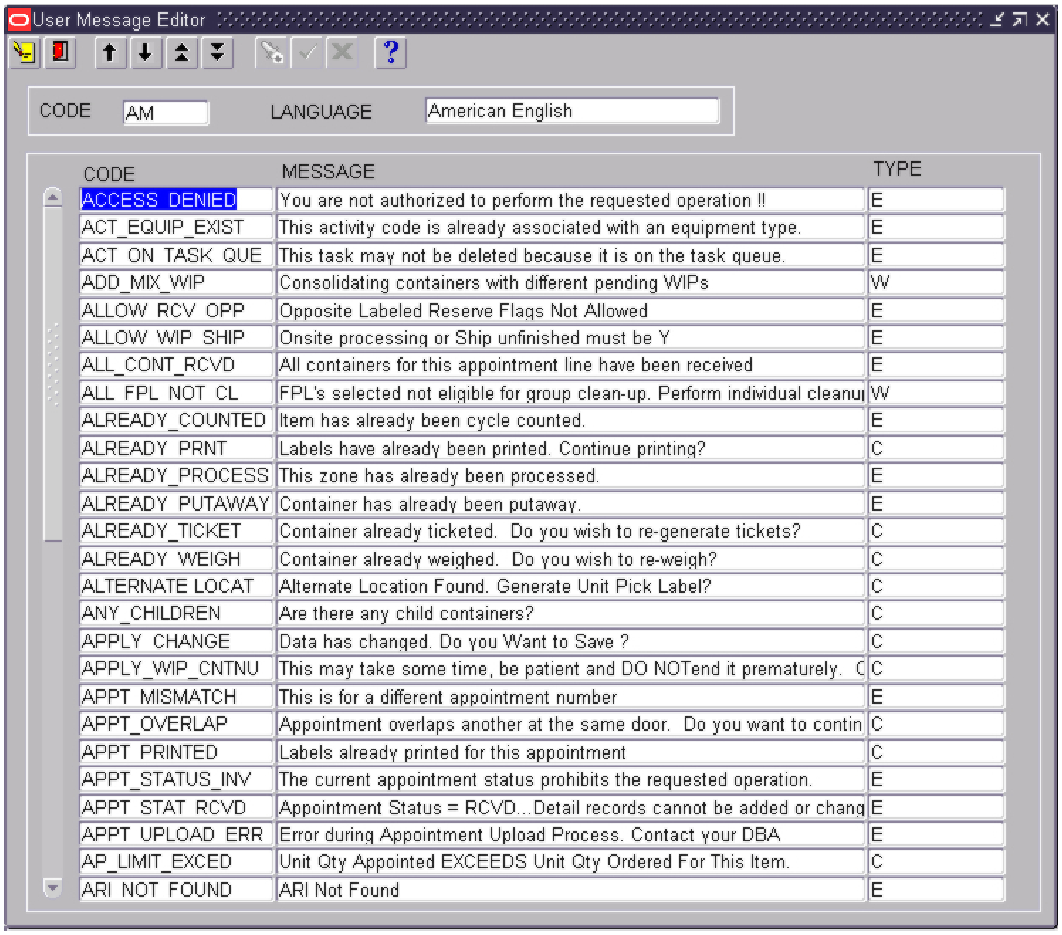
1. On the Menu Editor window, select the menu option that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Menu Editor Window

- Click the exit  button to close the window.

## Maintain Translations of User Messages

**Navigate:** From the main menu, select Support Functions > User/Task Setup > User Message Editor. The User Message Editor window opens.




| CODE | MESSAGE | TYPE |
|---|---|---|
| ACCESS DENIED | You are not authorized to perform the requested operation !! | E |
| ACT_EQUIP_EXIST | This activity code is already associated with an equipment type. | E |
| ACT ON TASK QUE | This task may not be deleted because it is on the task queue. | E |
| ADD_MIX_WIP | Consolidating containers with different pending WIPs | W |
| ALLOW RCV OPP | Opposite Labeled Reserve Flags Not Allowed | E |
| ALLOW WIP SHIP | Onsite processing or Ship unfinished must be Y | E |
| ALL_CONT_RCVD | All containers for this appointment line have been received | E |
| ALL FPL NOT CL | FPL's selected not eligible for group clean-up. Perform individual cleanu | W |
| ALREADY_COUNTED | Item has already been cycle counted. | E |
| ALREADY PRNT | Labels have already been printed. Continue printing? | C |
| ALREADY_PROCESS | This zone has already been processed. | E |
| ALREADY PUTAWAY | Container has already been putaway. | E |
| ALREADY_TICKET | Container already ticketed. Do you wish to re-generate tickets? | C |
| ALREADY WEIGH | Container already weighed. Do you wish to re-weigh? | C |
| ALTERNATE LOCAT | Alternate Location Found. Generate Unit Pick Label? | C |
| ANY_CHILDREN | Are there any child containers? | C |
| APPLY CHANGE | Data has changed. Do you Want to Save ? | C |
| APPLY_WIP_CNTNU | This may take some time, be patient and DO NOTend it prematurely. C | C |
| APPT MISMATCH | This is for a different appointment number | E |
| APPT_OVERLAP | Appointment overlaps another at the same door. Do you want to contin | C |
| APPT PRINTED | Labels already printed for this appointment | C |
| APPT_STATUS_INV | The current appointment status prohibits the requested operation. | E |
| APPT STAT RCVD | Appointment Status = RCVD...Detail records cannot be added or chang | E |
| APPT UPLOAD ERR | Error during Appointment Upload Process. Contact your DBA | E |
| AP_LIMIT_EXCED | Unit Qty Appointed EXCEEDS Unit Qty Ordered For This Item. | C |
| ARI NOT FOUND | ARI Not Found | E |

**User Message Editor Window**

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**Note:** You can also access this window from the Supported Language window.

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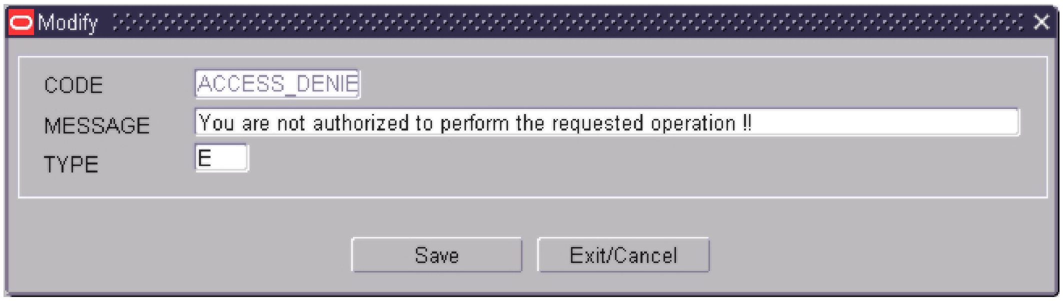
### Display the Messages

1. If any messages are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Code query field, enter the code for the language, or click the LOV  button and select the language.
4. Click the execute query  button. The messages associated with the selected language appear.

### Edit a Translation

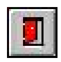
1. On the User Message Editor window, double-click the message that you want to edit. The Modify window opens.




**Modify Window**

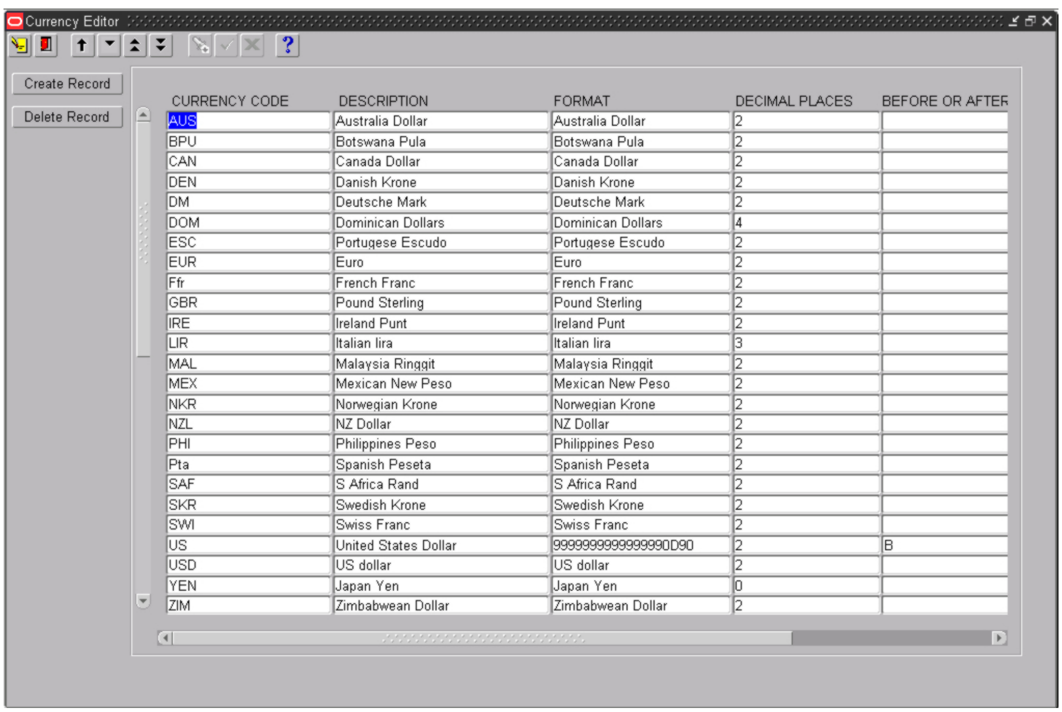
2. Edit the message and type as necessary.
3. Click **Save** to save any changes and close the Modify window.

### Exit the User Message Editor Window

- Click the exit  button to close the window.

## Maintain Currency Codes

**Navigate:** From the main menu, select Support Functions > Administration Setup > Currency Editor. The current currency codes appear in the Currency Editor window.

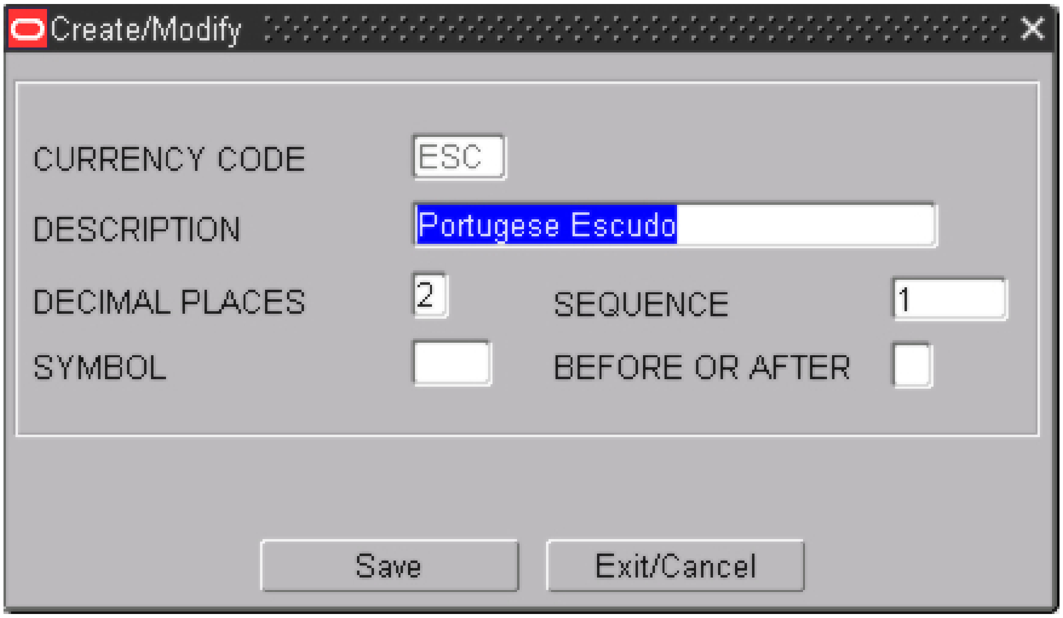



| CURRENCY CODE | DESCRIPTION | FORMAT | DECIMAL PLACES | BEFORE OR AFTER |
|---|---|---|---|---|
| AUS | Australia Dollar | Australia Dollar | 2 | |
| BPU | Botswana Pula | Botswana Pula | 2 | |
| CAN | Canada Dollar | Canada Dollar | 2 | |
| DEN | Danish Krone | Danish Krone | 2 | |
| DM | Deutsche Mark | Deutsche Mark | 2 | |
| DOM | Dominican Dollars | Dominican Dollars | 4 | |
| ESC | Portugese Escudo | Portugese Escudo | 2 | |
| EUR | Euro | Euro | 2 | |
| Ffr | French Franc | French Franc | 2 | |
| GBR | Pound Sterling | Pound Sterling | 2 | |
| IRE | Ireland Punt | Ireland Punt | 2 | |
| LIR | Italian lira | Italian lira | 3 | |
| MAL | Malaysia Ringgit | Malaysia Ringgit | 2 | |
| MEX | Mexican New Peso | Mexican New Peso | 2 | |
| NKR | Norwegian Krone | Norwegian Krone | 2 | |
| NZL | NZ Dollar | NZ Dollar | 2 | |
| PHI | Philippines Peso | Philippines Peso | 2 | |
| Pta | Spanish Peseta | Spanish Peseta | 2 | |
| SAF | S Africa Rand | S Africa Rand | 2 | |
| SKR | Swedish Krone | Swedish Krone | 2 | |
| SWI | Swiss Franc | Swiss Franc | 2 | |
| US | United States Dollar | 9999999999999990D90 | 2 | B |
| USD | US dollar | US dollar | 2 | |
| YEN | Japan Yen | Japan Yen | 0 | |
| ZIM | Zimbabwean Dollar | Zimbabwean Dollar | 2 | |

**Currency Editor Window**

### Edit a Currency Code

1. On the Currency Editor window, double-click the currency that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description and formatting instructions as necessary.
3. Click **Save** to save the changes and close the Create/Modify window.

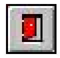
### Add a Currency Code

1. On the Currency Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Currency Code and Description fields, enter the code and description for the currency.
3. In the Decimal Places field, enter the number of decimal places used in the currency. The number may 0, 1, or 2.
4. In the Symbol field, enter the symbol used for the currency. (For example: $ for US dollars.)
5. In the Sequence field, enter a number that represents where the currency code is printed on tickets.
6. In the Before or After field, enter B (before) or A (after) to indicate whether the symbol should appear before or after monetary amounts.
7. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Currency Code

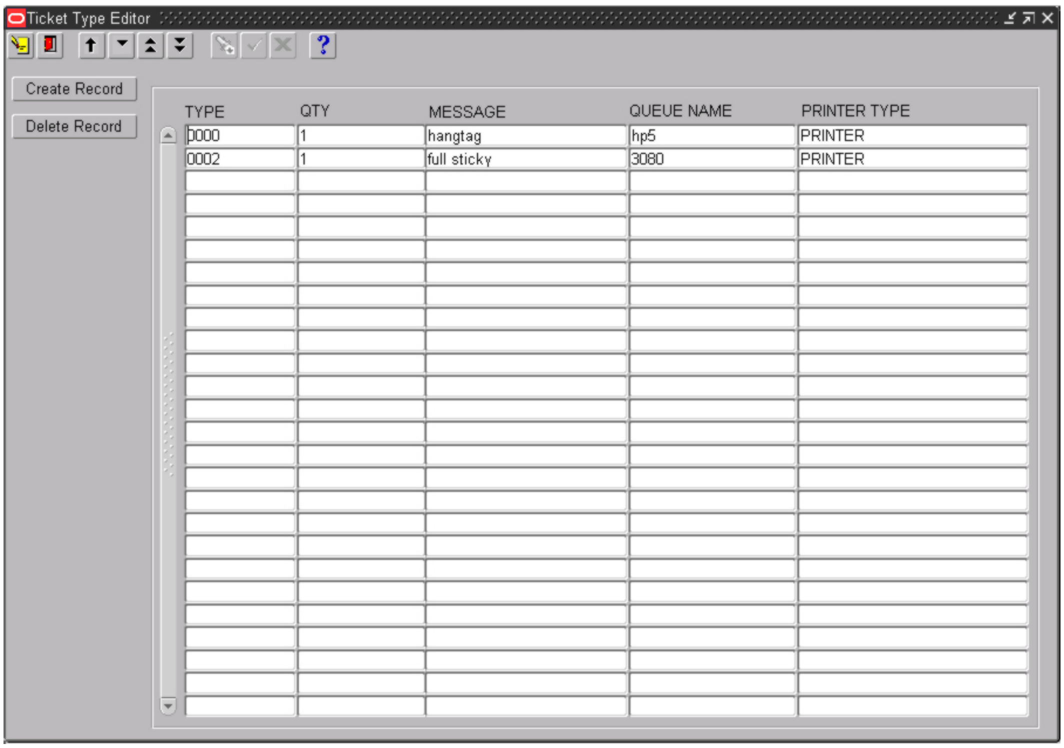
1. On the Currency Editor window, select the currency code that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Currency Editor Window

- Click the exit  button to close the window.

## Maintain Ticket Types

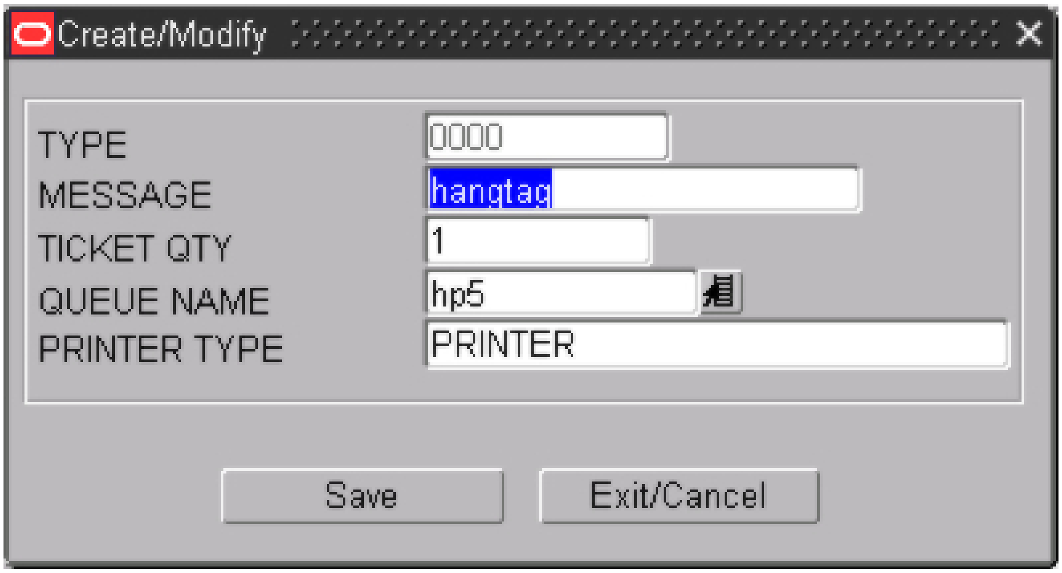
**Navigate:** From the main menu, select Support Functions > Administration Setup > Ticket Type Editor. The current ticket types appear in the Ticket Type Editor window.




**Ticket Type Editor Window**

### Edit a Ticket Type

1. On the Ticket Type Editor window, double-click the ticket type that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

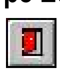
## Add a Ticket Type

1. On the Ticket Type Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Type field, enter the code for the ticket type.
3. In the Message field, enter the message to be printed with the ticket.
4. In the Ticket Qty field, enter the number of tickets to be printed.
5. In the Queue Name field, enter the name of the print queue, or click the LOV  button and select the print queue.
6. In the Printer Type field, enter the name of the printer.
7. Click **Save** to save the changes and close the Create/Modify window.

## Delete a Ticket Type

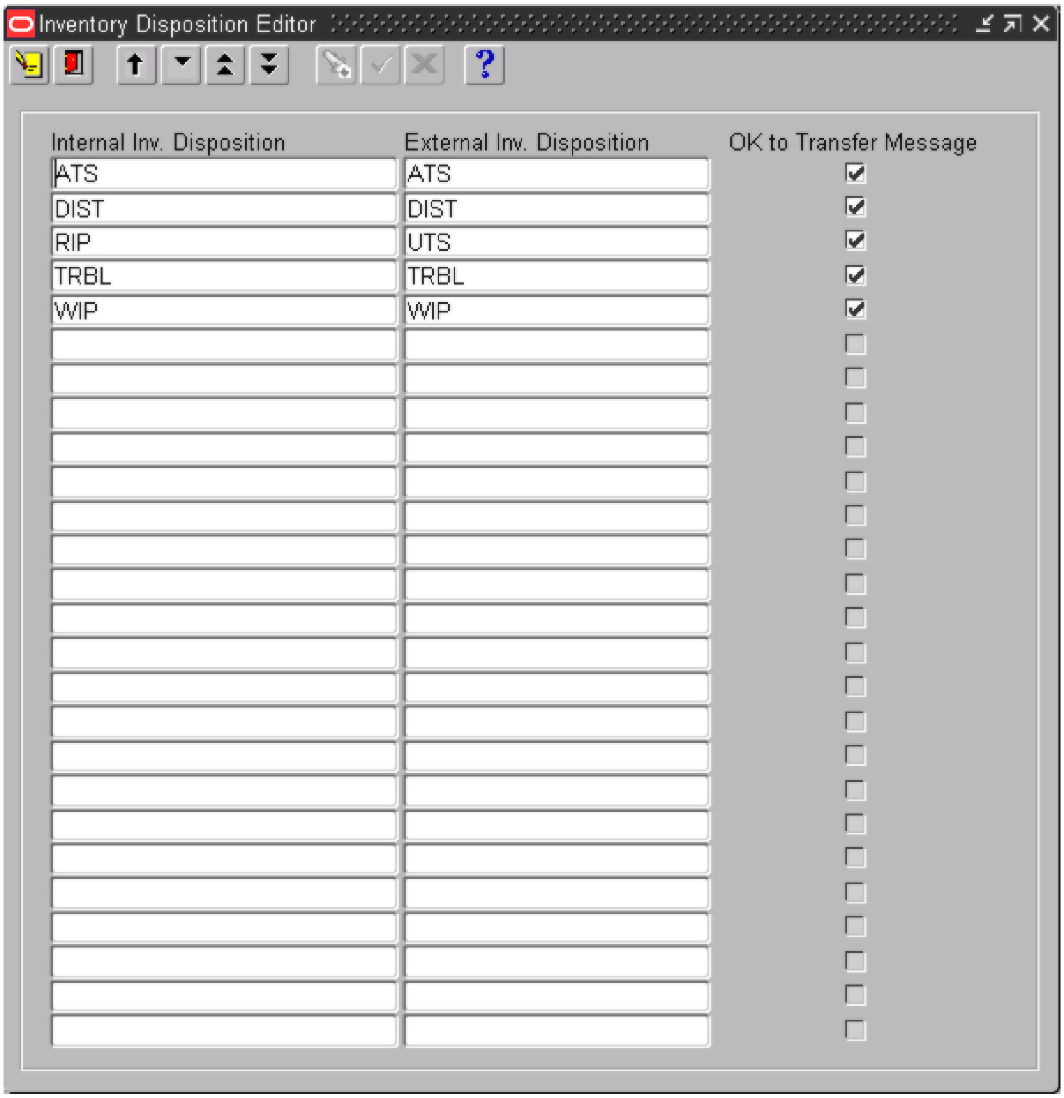
1. On the Ticket Type Editor window, select the ticket type that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Exit the Ticket Type Editor Window

- Click the exit  button to close the window.

## Maintain Inventory Disposition Codes

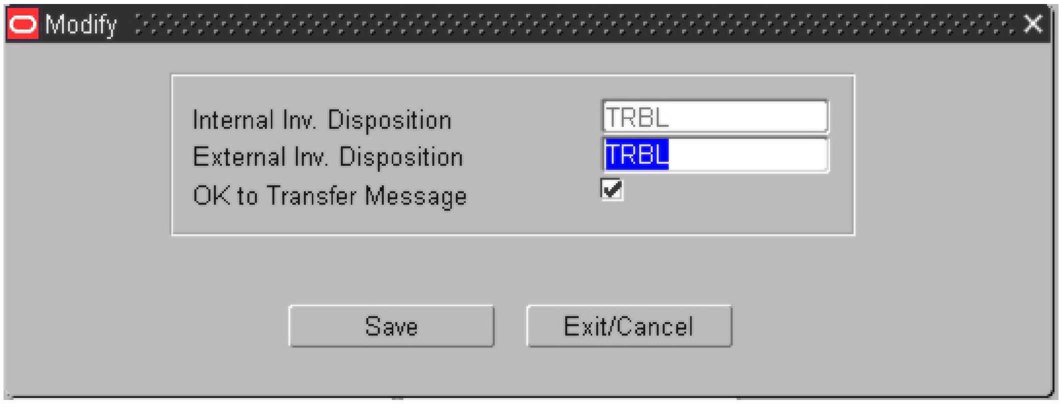
**Navigate:** From the main menu, select Support Functions > Administration Setup > Inventory Disposition Editor. The current codes appear in the Inventory Disposition Editor window.




**Inventory Disposition Editor Window**

### Edit an Inventory Disposition Code

1. On the Inventory Disposition Editor window, double-click the code that you want to edit. The Modify window opens.



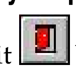

**Modify Window**

2. Edit the translated code as necessary.
3. To indicate that a message should be sent to the host system, select the OK to Transfer Message check box.

> **Note:** This functionality does not apply to the receipt_to_upload records uploaded to the host system. The receipt_to_upload does not use the transfer_message _flag in the table.

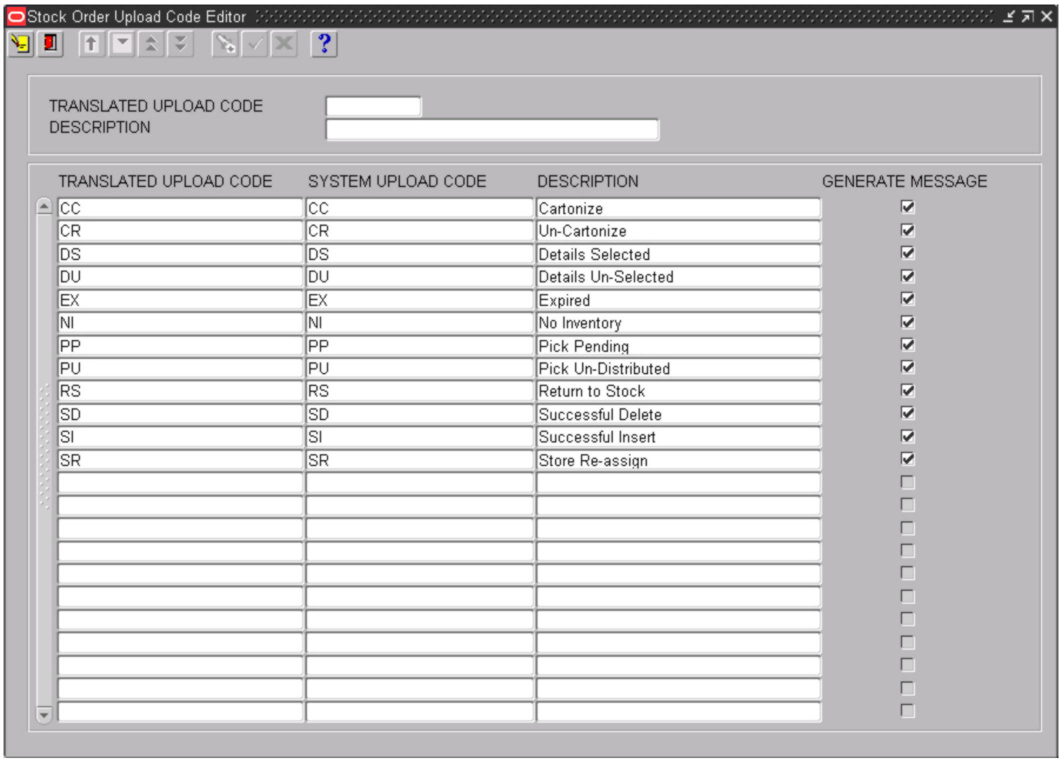
4. Click **Save** to save any changes and close the Modify window.

### Exit the Inventory Disposition Editor Window

- Click the exit  button to close the window.

## Maintain Stock Order Upload Codes

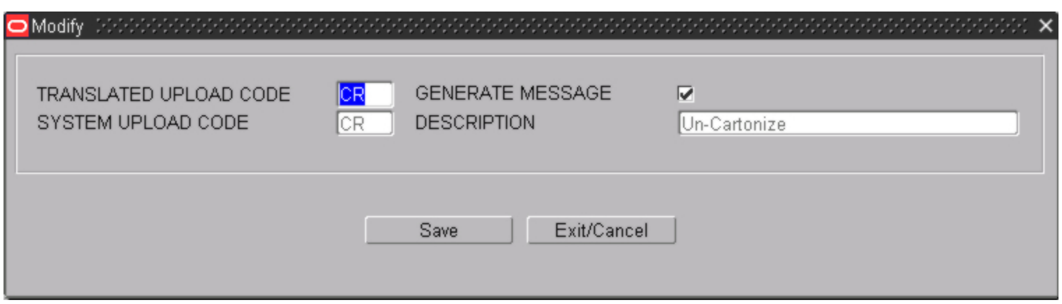
**Navigate:** From the main menu, select Support Functions > Administration Setup > Stock Order Upload Code Editor. The current codes appear in the Stock Order Upload Code Editor window.




**Stock Order Upload Code Editor Window**

### Edit a Stock Order Upload Code

1. On the Stock Order Upload Code Editor window, double-click the code that you want to edit. The Modify window opens.




**Modify Window**

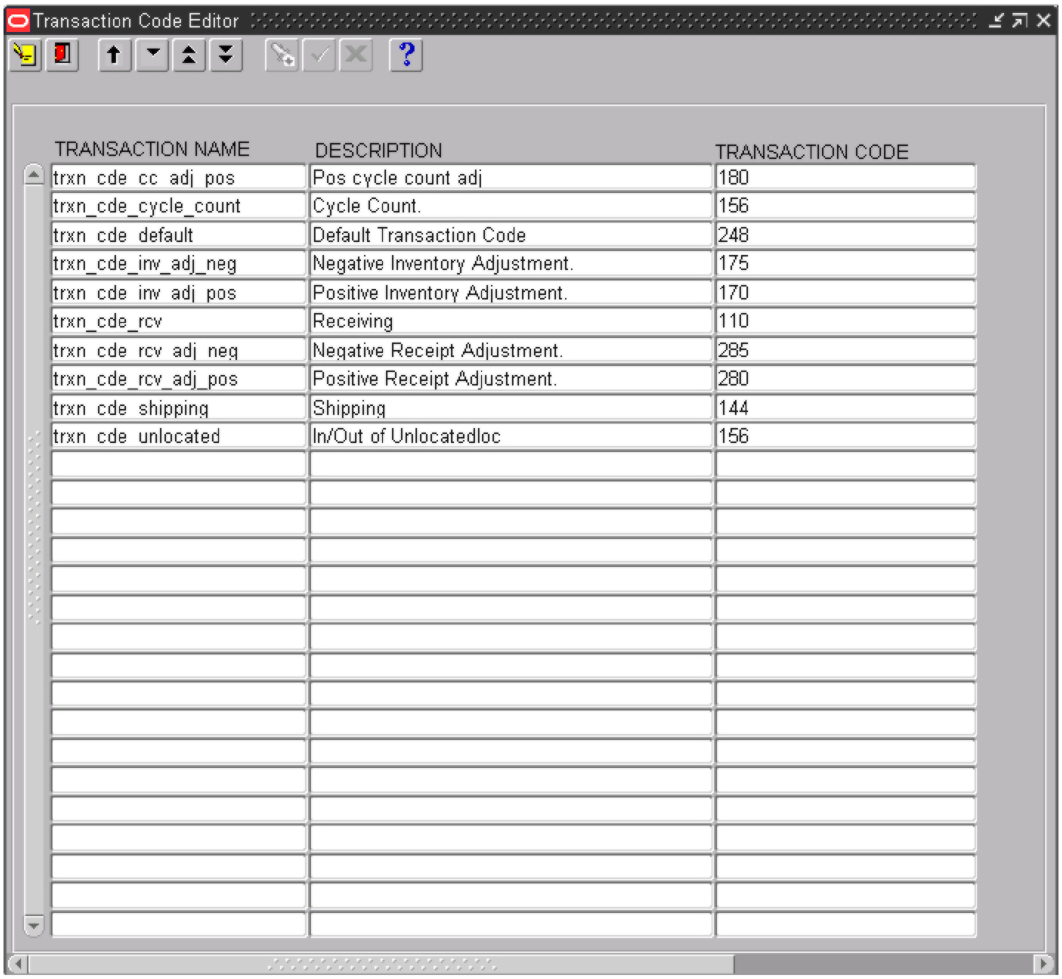
2. Edit the translated upload code as necessary.
3. To indicate that a message should be sent to the host system, select the Generate Message check box.
4. Click **Save** to save any changes and close the Modify window.

### Exit the Stock Order Upload Code Editor Window

- Click the exit button to close the window.

## Maintain Transaction Codes

**Navigate:** From the main menu, select Support Functions > Administration Setup > Transaction Code Editor. The current transaction codes appear in the Transaction Code Editor window.

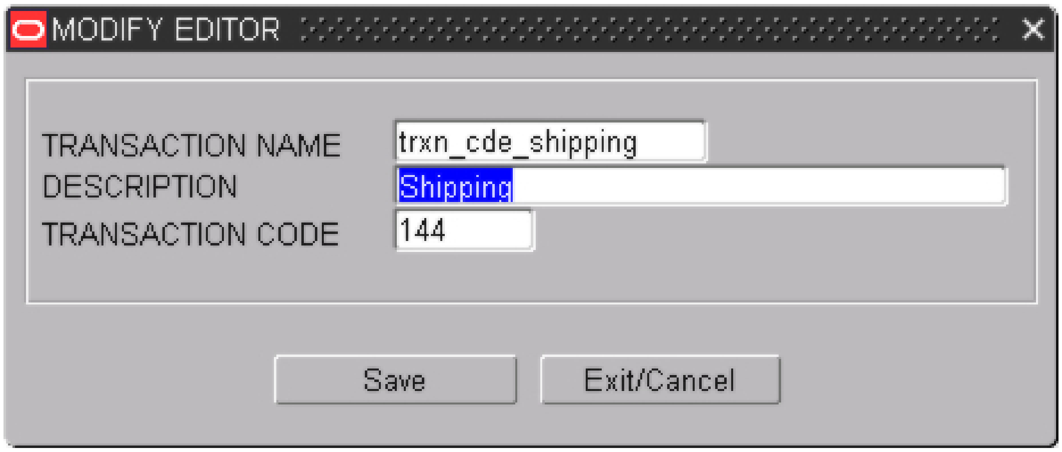



| TRANSACTION NAME | DESCRIPTION | TRANSACTION CODE |
|---|---|---|
| trxn_cde_cc_adj_pos | Pos cycle count adj | 180 |
| trxn_cde_cycle_count | Cycle Count. | 156 |
| trxn_cde_default | Default Transaction Code | 248 |
| trxn_cde_inv_adj_neg | Negative Inventory Adjustment. | 175 |
| trxn_cde_inv_adj_pos | Positive Inventory Adjustment. | 170 |
| trxn_cde_rcv | Receiving | 110 |
| trxn_cde_rcv_adj_neg | Negative Receipt Adjustment. | 285 |
| trxn_cde_rcv_adj_pos | Positive Receipt Adjustment. | 280 |
| trxn_cde_shipping | Shipping | 144 |
| trxn_cde_unlocated | In/Out of Unlocatedloc | 156 |

**Transaction Code Editor Window**

### Edit a Transaction Code

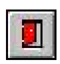
1. On the Transaction Code Editor window, double-click the transaction code that you want to edit. The Modify Editor window opens.




**Modify Editor Window**

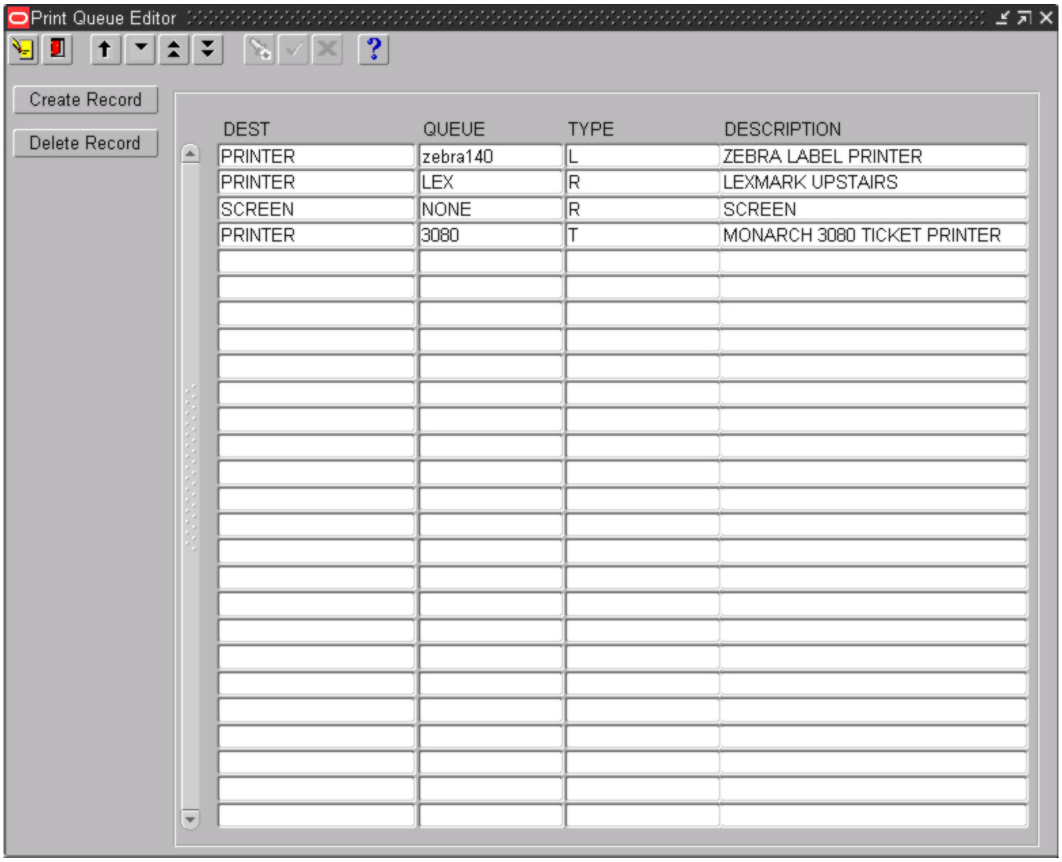
2. Edit the description and transaction code as necessary.
3. Click **Save** to save the change and close the Modify Editor window.

### Exit the Transaction Code Editor Window

- Click the exit  button to close the window.

## Maintain Print Queues

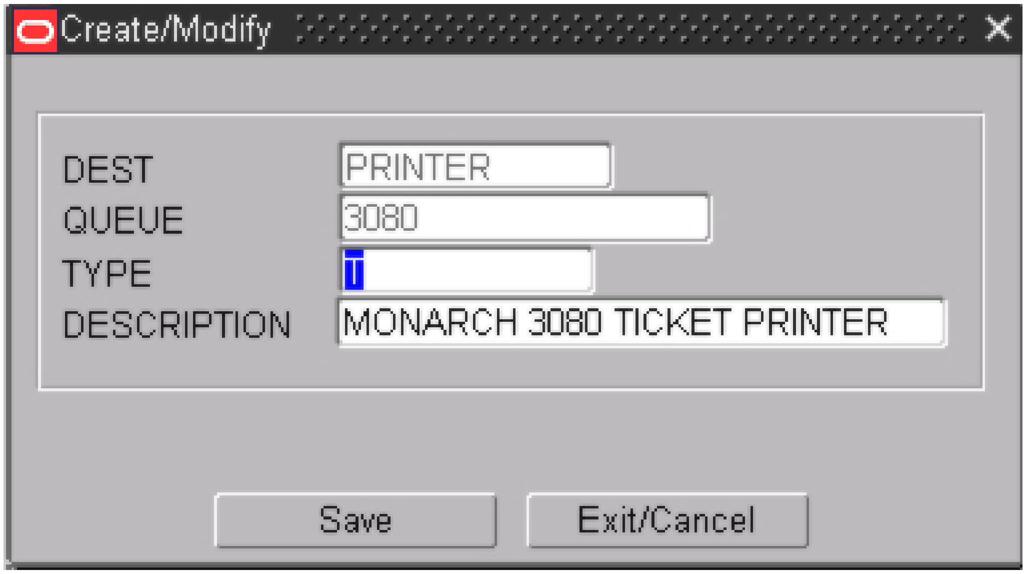
**Navigate:** From the main menu, select Support Functions > Administration Setup > Print Queue Editor. The current print queues appear in the Print Queue Editor window.




**Print Queue Editor Window**

### Edit a Print Queue

1. On the Print Queue Editor window, double-click the print queue that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the type and description as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Print Queue

1. On the Print Queue Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Dest field, enter the destination. The destination may be Printer, File, or Screen.
3. In the Queue field, enter the name of the print queue. If the Destination is File or Screen, the Queue defaults to None.
4. In the Description field, enter the description of the print queue.
5. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Print Queue

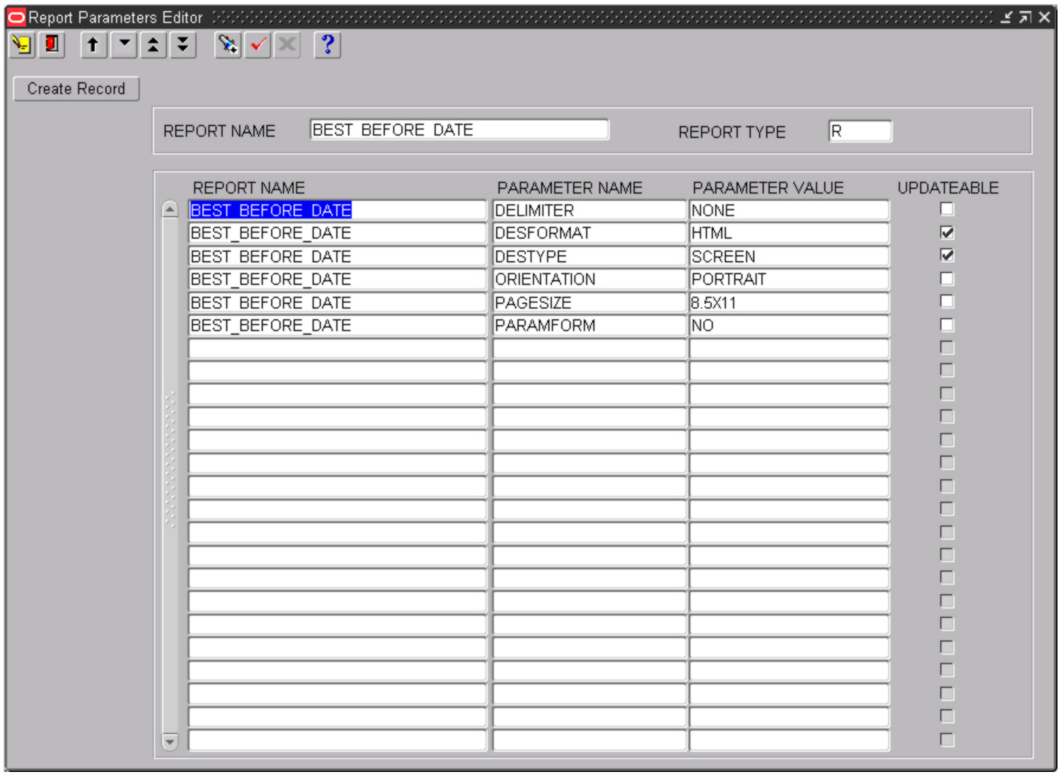
1. On the Print Queue Editor window, select the print queue that you want to edit.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Print Queue Editor Window

- Click the exit  button to close the window.

## Maintain Default Parameters for Reports

**Navigate:** From the main menu, select Support Functions > Administration Setup > Reports Parameter Editor. The Report Parameters Editor window opens.




**Report Parameters Editor Window**

### Display Default Parameters for All Reports

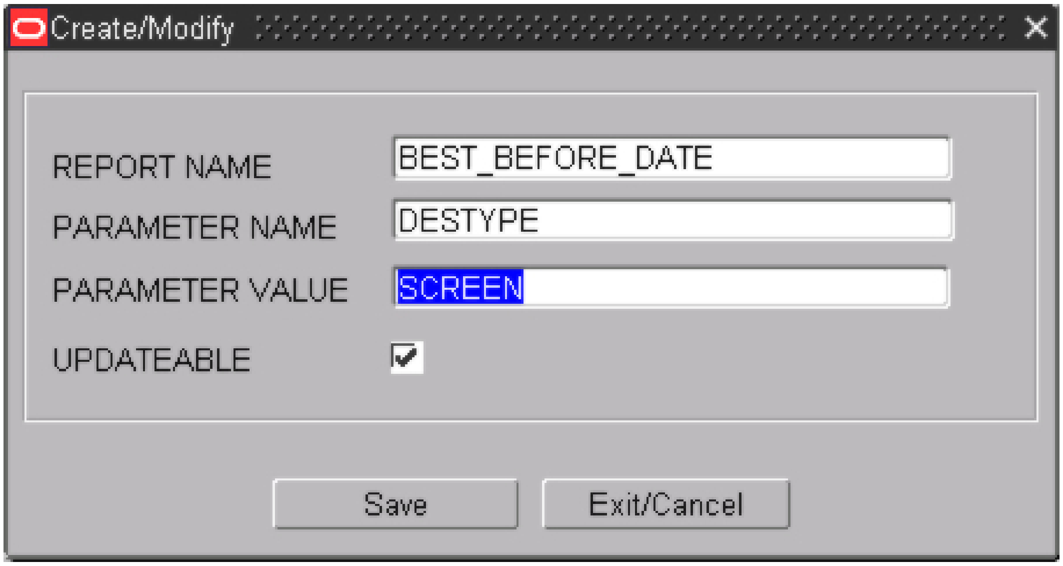
- Click the execute query  button.

### Display Default Parameters for One Report

1. If any report parameters are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Report Name query field, enter the name of the report, or click the LOV  button and select the report.
4. Click the execute query  button. The default parameters for the selected report appear.

### Edit a Default Parameter

1. On the Report Parameters Editor window, double-click the parameter that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

> **Note:** Only parameters marked as Updateable may be edited.

2. Edit the Parameter Value field and Updateable check box as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Default Parameter

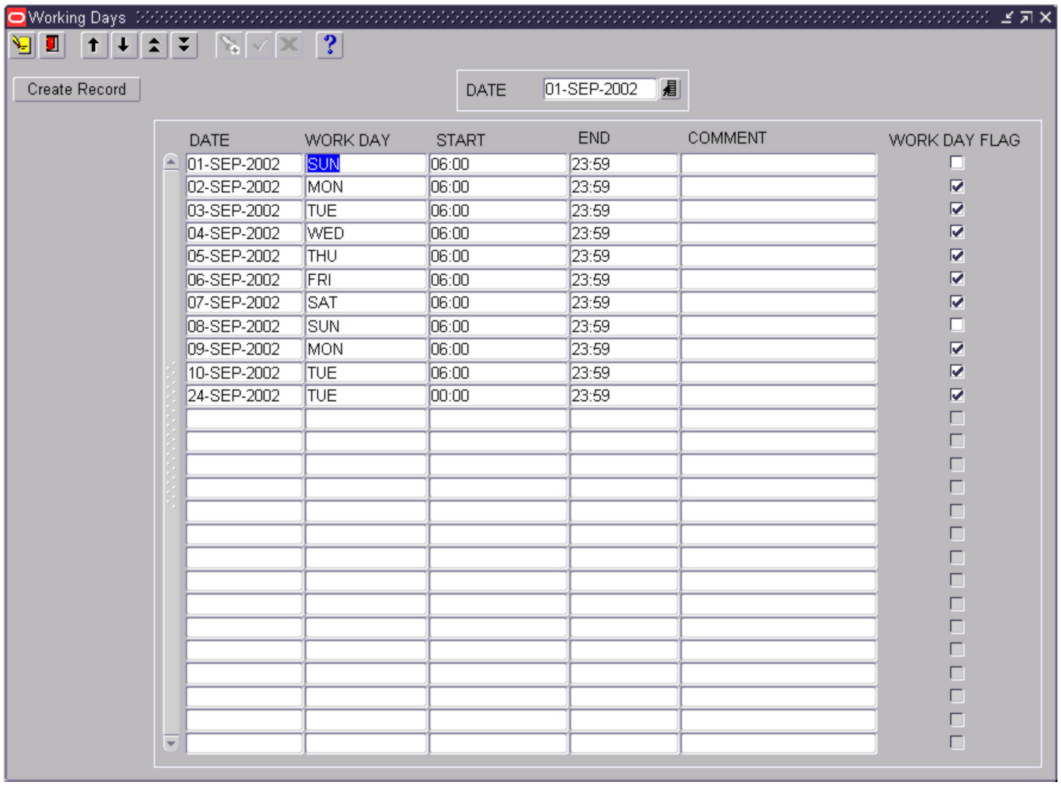
1. On the Report Parameters Editor window, select the report name that you want to edit.
2. Click **Create Record**. The Create/Modify window opens.
3. In the Parameter Name field, enter the name of the parameter, or click the LOV  button and select the parameter.
4. In the Parameter Value field, enter the default value for the parameter.
5. Clear the Updateable check box if you do not want users to update the default parameter.
6. Click **Save** to save the changes and close the Create/Modify window.

### Exit the Report Parameters Editor Window

- Click the exit  button to close the window.

## Maintain Work Days

**Navigate:** From the main menu, select Support Functions > Administration Setup > Working Days Editor. The Working Days window opens. By default, the current date opens in the Date query field.




**Working Days Window**

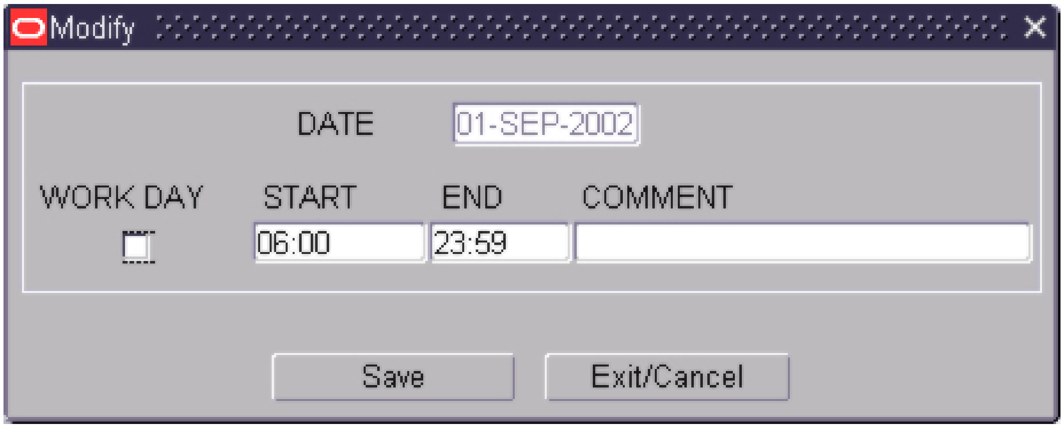
### Display a Range of Dates

1. In the Date query field, enter the start date, or click the calendar  button and select the date.
2. Click the execute  query button. The dates from the selected date forward are displayed.

> **Note:** The work day defaults are determined by system settings: start time, end time, and whether Saturdays and Sundays are work days. You can override the default times when adding a work day. You can override the work day indicator when editing a record.

### Edit a Date

1. On the Working Days window, double-click the work date that you want to edit. The Modify window is displayed.




**Modify Window**

2. Edit the work day indicator and the start and end times as necessary.
3. Enter appointment times as necessary.
4. Enter or edit a comment as necessary.
5. Click **Save** to save any changes and close the Modify window.

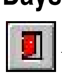
### Add One or More Days

1. On the Working Days window, click **Create Record**. The Create window opens.


**Create Window**

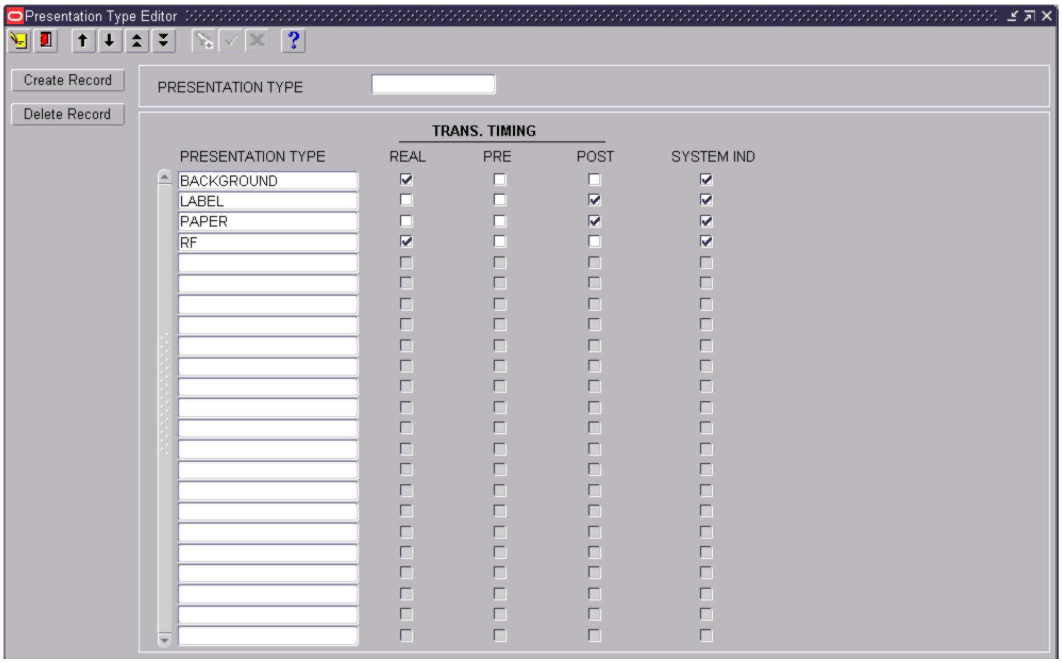
2. To add one date, enter the same date in both the Start Date and End Date fields. To add a range of dates, enter the start date and end date in their respective fields.
3. In the Start Time and End Time fields, enter the times when the work day begins and ends. Use 24 hour international standard notation.
4. Enter appointment times as necessary.
5. Click **Save** to save the changes and close the Create window.

### Exit the Working Days Window

- Click the exit  button to close the window.

## Maintain Presentation Types

**Navigate:** From the main menu, select Support Functions > Administration Setup > Presentation Type Editor. The Presentation Type Editor window opens.




**Presentation Type Editor Window**

### Display All Presentation Types

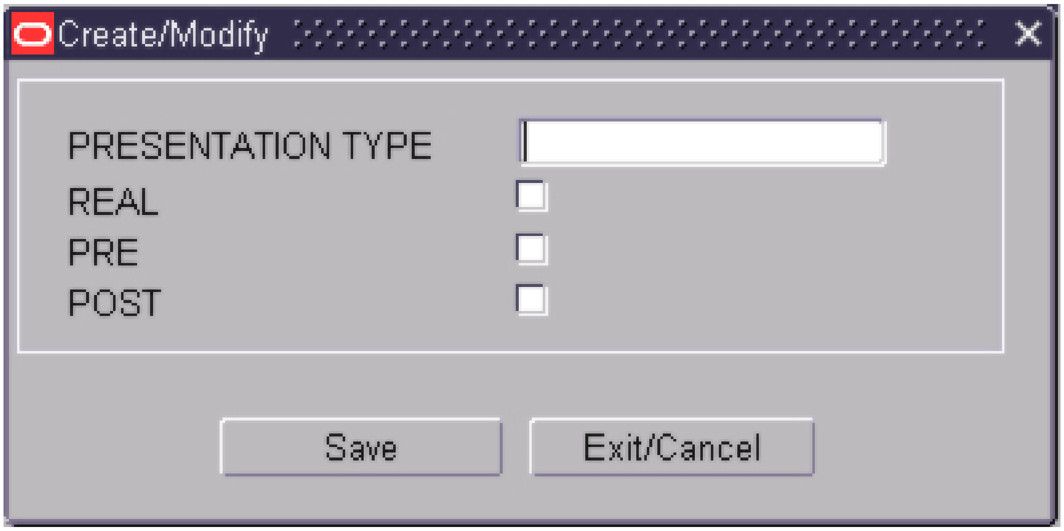
- Click the execute query button.

### Display a Presentation Type

1. If any presentation types are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Presentation Type query field, enter the name of the presentation type, or click the LOV button and select the presentation type.
4. Click the execute query button. The presentation type that matches the search criterion opens.

### Edit a Presentation Type

1. On the Presentation Type Editor window, double-click the presentation type that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

> **Note:** You can not edit a presentation type if the system indicator is selected.

2. Edit the transaction timing selections as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Presentation Type

1. On the Presentation Type Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Presentation Type field, enter a name for the presentation type.
3. Select one or more of the following transaction timing methods:
   - Real: Inventory is affected during screen usage. Real time is mutually exclusive from pre- and post-transactional timing.
   - Pre: Inventory is affected before the action occurs.
   - Post: Inventory is affected after the action occurs.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Presentation Type

1. On the Presentation Type Editor window, select the presentation type that you want to delete.

> **Note:** You can not delete a presentation type if the system indicator is selected.

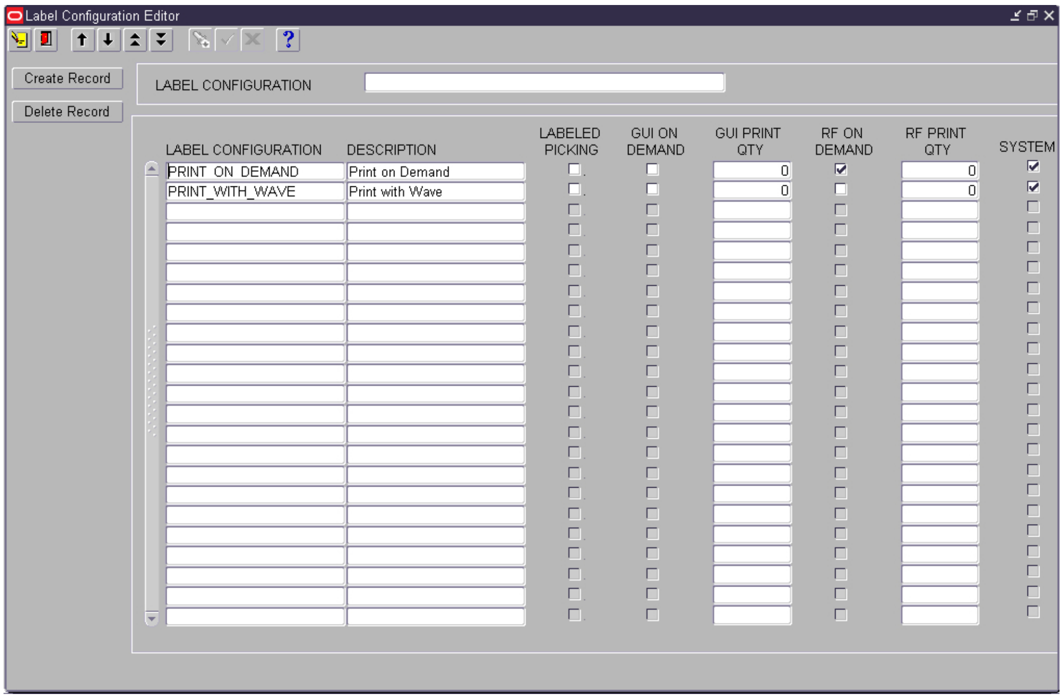
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Presentation Type Editor Window

- Click the exit button to close the window.

## Maintain Label Configurations

**Navigate:** From the main menu, select Support Functions > Administration Setup > Label Configuration Editor. The Label Configuration Editor window opens.




**Label Configuration Editor Window**

### Display All Label Configurations

- Click the execute query button.

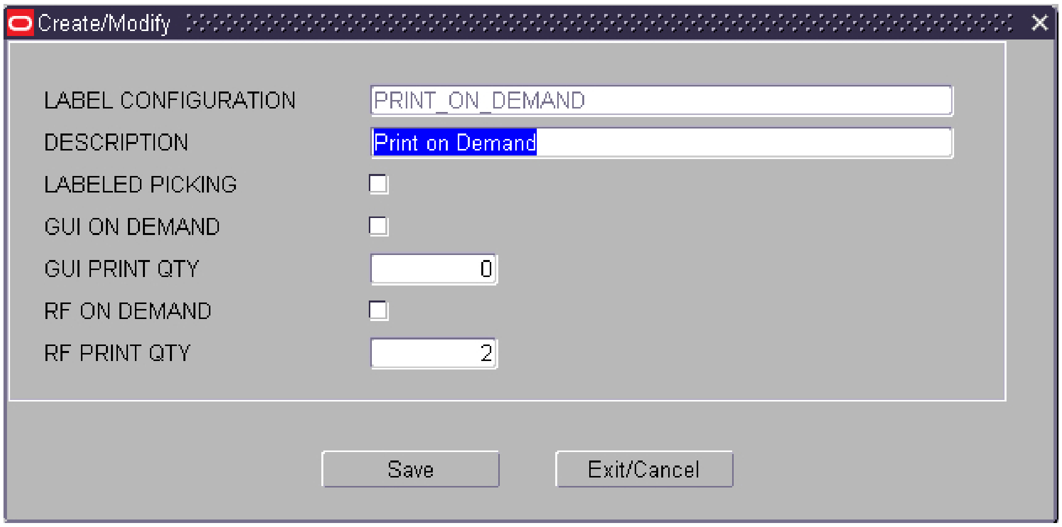
### Display a Label Configuration

1. If any label configurations are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Label Configuration query field, enter the name of the label configuration, or click the LOV button and select the label configuration.
4. Click the execute query button. The label configuration that matches the search criterion opens.

> **Note:** If you enter a partial name in the Label Configuration query field, all label configurations that begin with the same characters will be displayed.

### Edit a Label Configuration

1. On the Label Configuration Editor window, double-click the label configuration that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

> **Note:** You cannot edit a label configuration if the system indicator is selected.

2. Edit the enabled fields as necessary.
3. Click **Save** to save the changes and close the Create/Modify window.

### Add a Label Configuration

1. On the Label Configuration Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Label Configuration and Description fields, enter a name and description for the label configuration.
3. Select Labeled Picking if necessary for the task.
4. Select GUI on Demand if you prefer that labels be printed for a GUI user only when requested.
5. In the GUI Print Qty field, enter the number to be printed.
6. Select RF on Demand if you prefer that labels be printed for an RF user only when requested.
7. In the RF Print Qty field, enter the number to be printed.
8. Click **Save** to save the changes and close the Create/Modify window.

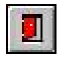
### Delete a Label Configuration

1. On the Label Configuration Editor window, select the label configuration that you want to delete.

> **Note:** You can not delete a label configuration if the system indicator is selected.

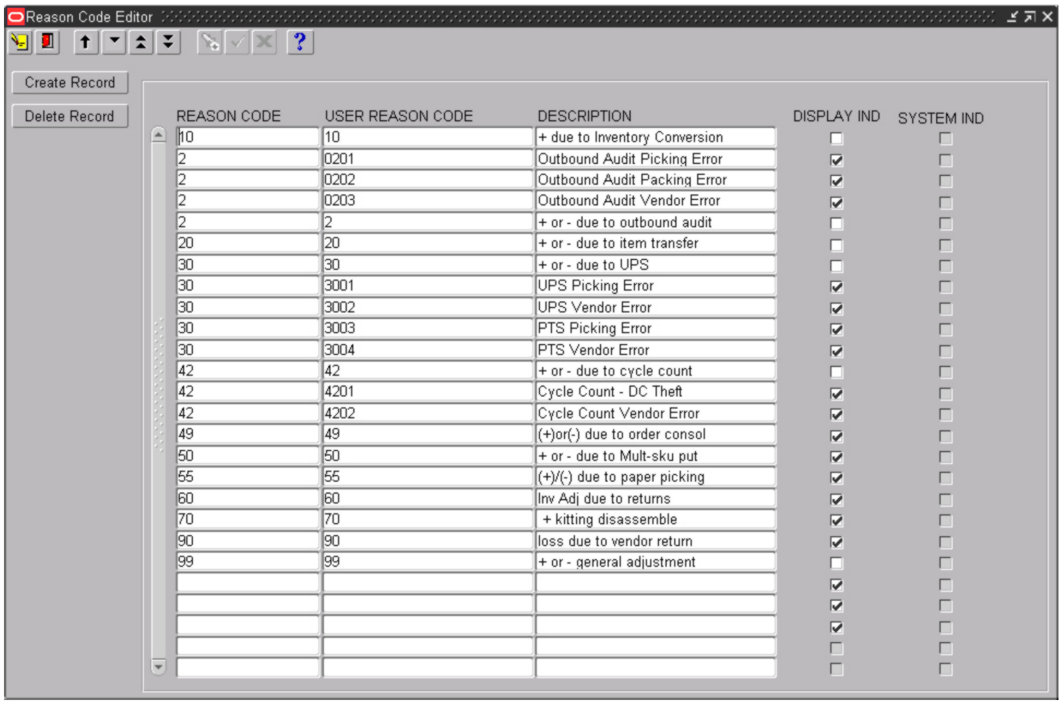
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Label Configuration Editor Window

- Click the exit  button to close the window.

## Maintain Reason Codes

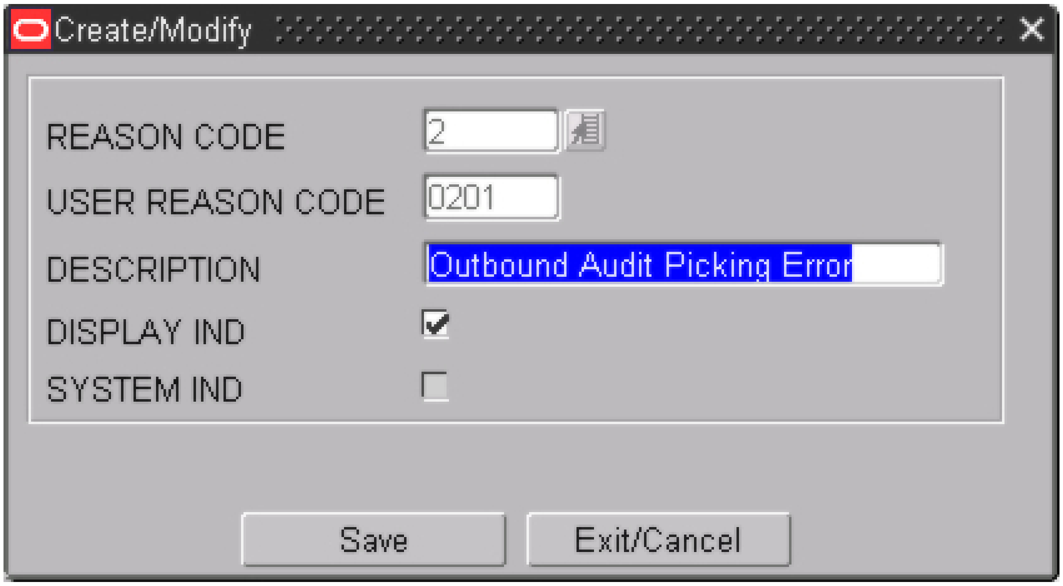
**Navigate:** From the main menu, select Support Functions > Administration Setup > Inv Adjustment Reason Code Editor. The current reason codes appear in the Inv Adjustment Reason Code Editor window.




**Adjustment Reason Code Editor Window**

### Edit a Reason Code

1. On the Inv Adjustment Reason Code Editor window, double-click the reason code that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description and display indicator as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Reason Code

1. On the Inv Adjustment Reason Code Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Reason Code field, enter a reason code that you want to translate, or click the LOV  button and select the reason code.
3. In the User Reason Code and Description fields, enter a user-defined code and description for the reason.
4. To allow users to view the reason code in List of Values windows, select the Display Ind check box.
5. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Reason Code

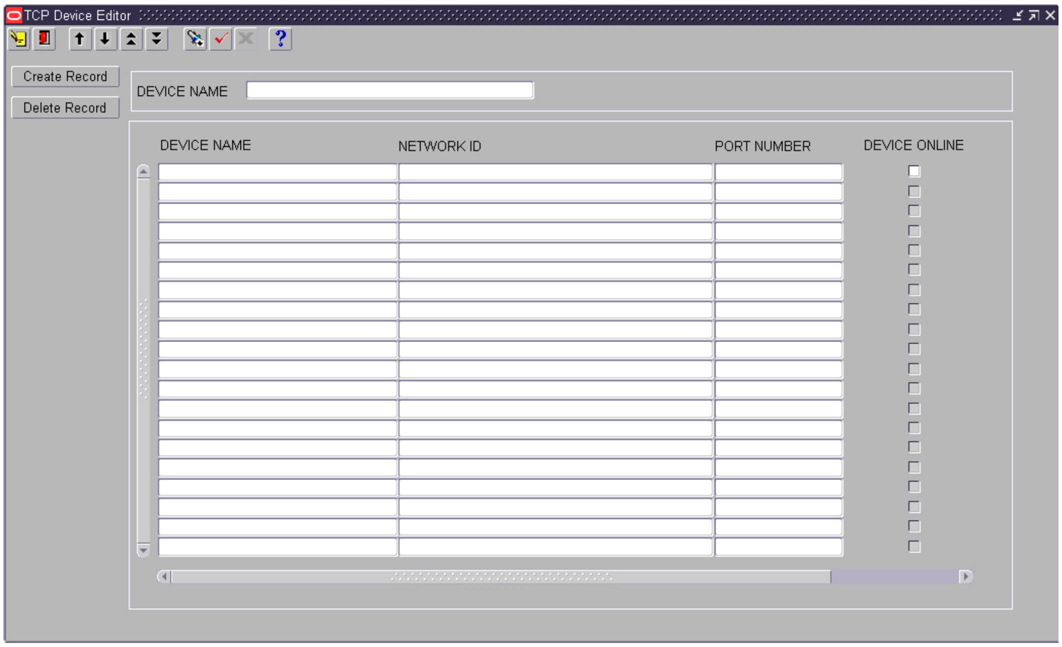
1. On the Inv Adjustment Reason Code Editor window, select the reason code that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Reason Code Editor Window

- Click the exit  button to close the window.

# Maintain TCP Parameters

**Navigate:** From the main menu, select Support Functions > Administration Setup > TCP Device Editor. The TCP Device Editor window opens.




**TCP Device Editor Window**

## Display all TCP Parameters

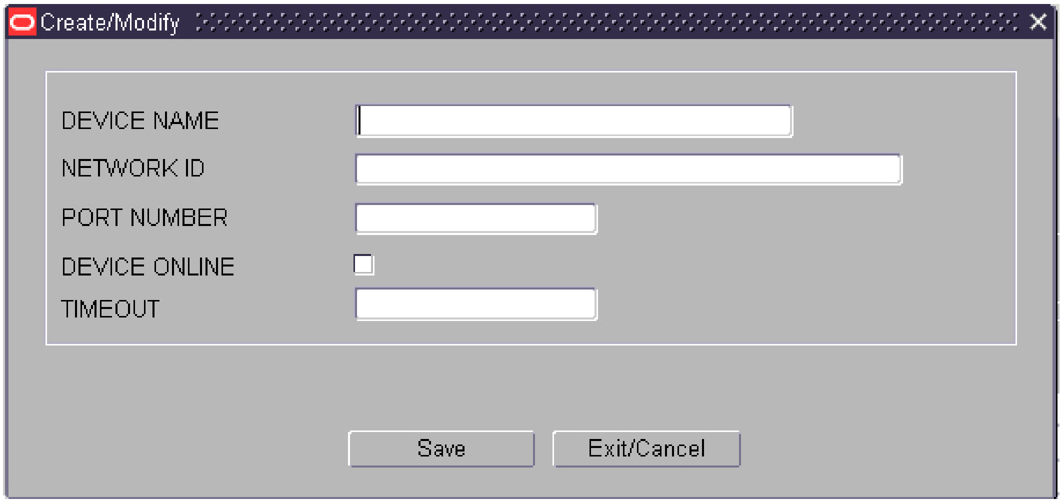
- Click the execute query  button.

## Display a TCP Parameter

1. If any TCP parameters are currently displayed, click the clear  button.
2. Click the enter query  button.
3. To search for TCP parameters, enter the name of the Cubiscan device in the Device Name query field, or click the LOV  button and select the device.
4. Click the execute query  button. The TCP parameter that matches the search criterion appear.

## Edit a TCP Parameter

1. On the TCP Device Editor window, double-click the TCP parameter that you want to edit. The Create/Modify window opens.



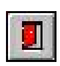

**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save the changes and close the Create/Modify window.

### Add a TCP Parameter

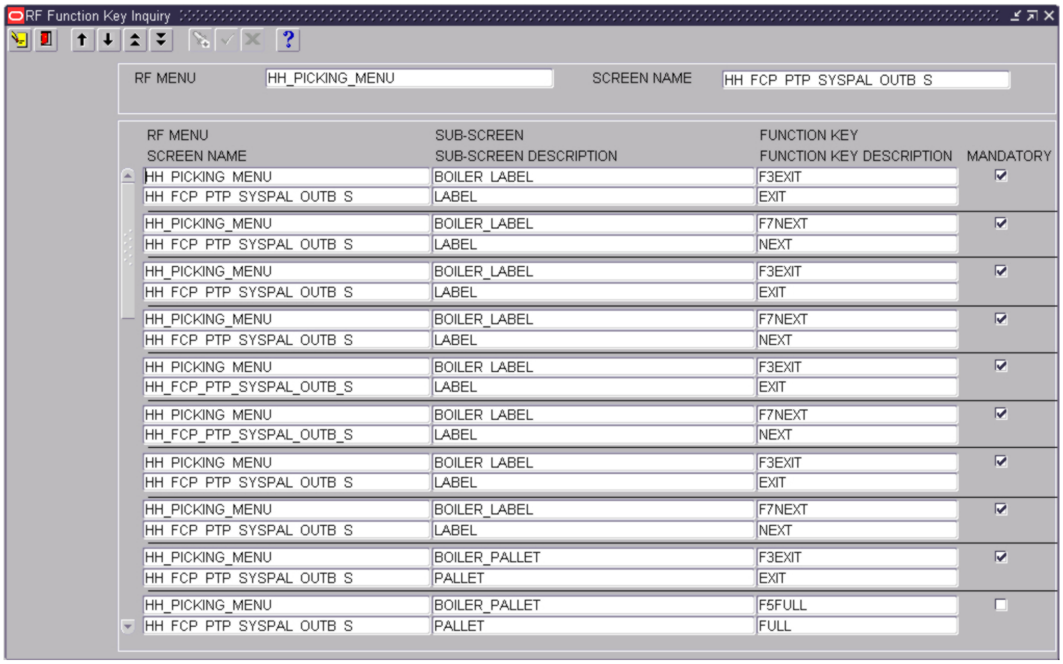
1. Click **Create Record**. The Create/Modify window opens.
2. In the Device Name field, enter the ID of the device you want to interface with.
3. In the Network ID field, enter the network ID the device is using.
4. In the Port Number field, enter the port the device is using.
5. If the device is online, select the Device Online check box.
6. In the Timeout field, enter the amount of time before the connection is lost.
7. Click **Save** to save your changes and close the Create/Modify window.

### Exit the TCP Device Editor Window

- Click the exit  button to close the window.

# View Active RF Function Keys

**Navigate:** From the main menu, select Support Functions > Administration Setup > RF Function Key Inquiry. The RF Function Key Inquiry window opens.




**RF Function Key Inquiry Window**

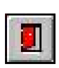
## Display All RF Screens

- Click the execute query  button.

## Display a Subset of RF Screens

1. If any RF screens are currently displayed, click the clear  button.
2. Click the enter query  button.
3. To display RF screens associated with a menu, enter the name of the menu in the RF Menu query field, or click the LOV  button and select the menu.
   To display a screen and any related sub-screens, enter the name of the RF screen in the Screen Name query field, or click the LOV  button and select the RF screen.
4. Click the execute query  button. The RF screens that match the search criteria appear.

## Exit the RF Function Key Inquiry Window

- Click the exit  button to close the window.

# DC Setup

The DC setup module allows you to set up various aspects of the distribution center.

## Business Process

There are several ways to set up the DC. Some factors to consider are the business process flow, the physical layout of the DC, the types of merchandise received, the types of containers used, and the equipment used to put away and pick merchandise. Once a strategy is developed, you can set up the following:

- Cartonization: Set up container types, including measurements. For outbound containers, state the collateral and dunnage weights. Group container types into carton groups which can be assigned to items.
- Location types and location classes: Location types should be created for each unique material handling and storage configuration. Location classes are used to group locations with similar characteristics, processes, and equipment classes assigned to them. When a location type and a location class are assigned to a location, the location inherits the location type and location class settings. If necessary, you can modify those settings at the location level.
- Location hierarchy: Set up the DC departments, regions, work areas, zones, and locations that exist in the DC. Assign attributes to each location. Identify the shipping and receiving doors and the shipping destinations. Enter the capacity and inventory for each forward pick location. Associate put-to-store (PTS) locations with outbound destinations. Set up random active locations for less than case distribution.
- Unit pick systems: Set up the sorter groups. Then set up the unit pick systems, including the induct zones and destinations. Set up the chutes, including their maximum capacity and fill percentages.
- Putaway plans: Define the putaway plans, including the zones, location types, and putaway methods. The putaway method may be: 1) put into a location that is empty (EMP), 2) put into a location that contains the same item, casepack, and lot (SAM), or 3) put into a location that contains a different item, casepack, and lot (DIF).

## Reports

The Location Class Profile report lists all defaults, processes, and equipment classes assigned to a specified location class or location. At the location class level, you can choose to display all locations that are members of the location class or only those members with exceptions.

## Cartonization and Containers

Cartonization refers to the automated calculations that RWMS performs in order to determine the proper size and type of box in which to pack each customer order for outbound shipment.

The cartonization process relies on the following steps:

1. Set up the container types, including the dimensions and weight.
2. Define additional characteristics for outbound container types. State the collateral weight, dunnage weight, and maximum dunnage.
   - Collateral weight: The weight of extra materials that are included in a carton, such as flyers, coupons, and so on.
   - Dunnage weight: The weight of the packing materials.
   - Minimum dunnage: The least amount of dunnage that a carton is expected to contain.

   > **Note:** The available weight for a carton is calculated as the maximum weight designated for the container type minus the collateral and minimum dunnage weights set up for the outbound container.

3. Group container types into carton groups. Define one or more attribute types for carton groups, define attributes to correspond with each carton group. Assign the attributes to items.
4. The following system parameters must be set for the cartonization process:
   - default_carton_group: Identifies the default carton group assigned to an item when a carton group has not been selected.
   - exception_cont_type: Identifies the default container type assigned to an item if none of the container types in the default carton group fits the item.

## Random Active Locations

RWMS can use random active locations to store units for less than case distribution. This is useful if a broken case quantity is ordered for an item which is not assigned to a unit pick location. In this case, the system distributes items from a random location. Depending on how system parameters are set up, locations may be automatically assigned or the user may assign locations during the replenishment process.

The following issues must be considered when using random active locations:

1. An active (type A) putaway plan must be assigned to the item.
2. A region must be set up for random active locations. The entry location for the region serves as the drop-off location for replenishment.
3. The location must be associated with a location type that allows random active locations.
4. The random active locations must be in zones that are included in the putaway plan. The zones must be in regions set up for random active locations.
5. The following system parameters must be set:
   - def_random_putaway: Identifies the default putaway plan assigned to an item for which a putaway plan has not been selected. The plan must be type A.

- dynamic_random_slot: Enter N (No) to allow the user to select random locations during the replenishment process. Enter Y (Yes) to prevent the user from overriding the putaway location.
- random_replen_dest_id: Identify an internal destination ID for random active location functionality.
- random_active_stage: If a staging location is used as a drop-off point for replenishment containers destined for random active locations, identify the staging location.

## Unit Sorter Setup

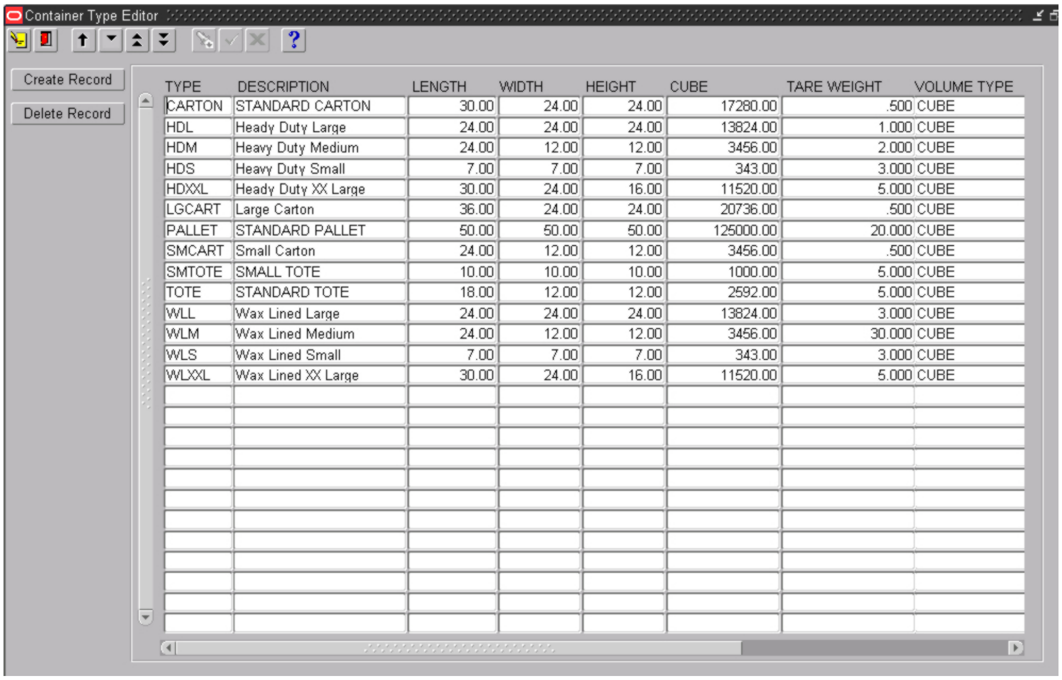
When processing waves, RWMS 1) determines the quantity of merchandise that fits into each chute of a unit sorter, 2) assigns units to the appropriate chute, and 3) properly distributes merchandise from a pick wave into multiple pack waves across multiple sorters in a sorter group.

The process for setting up unit sorters is as follows:

1. Identify the sorter groups.
   - Set the maximum number of pack waves allowed for each pick wave.
   - Indicate where merchandise should be dropped-off for both conveyable and non-conveyable merchandise.
2. Assign sorter groups to unit pick systems.
   - Indicate the number of chutes to be used for each pack wave (referred to as pack wave size).
3. Set up the induct zones, the pick-up and drop-off locations, and the internal destinations for unit pick systems.
4. Identify the chute types. Chute types are identified on downloaded or manually created stock orders.
   - Normal orders are routed to a system-defined, regular chute type. Identify the regular chute type for the system parameter reg_pack_chute.
5. Set up the chutes. Associate each chute with a chute type. Limit the chute to particular brand if necessary. Enter the maximum capacity by cube, units, and number of orders. State the fill and regular fill percentages.
6. For each item in the system, indicate whether it is a sortable item.

## Maintain Container Types

**Navigate:** From the main menu, select Support Functions > DC Setup > Container Type Editor. The current container types appear in the Container Type Editor window.

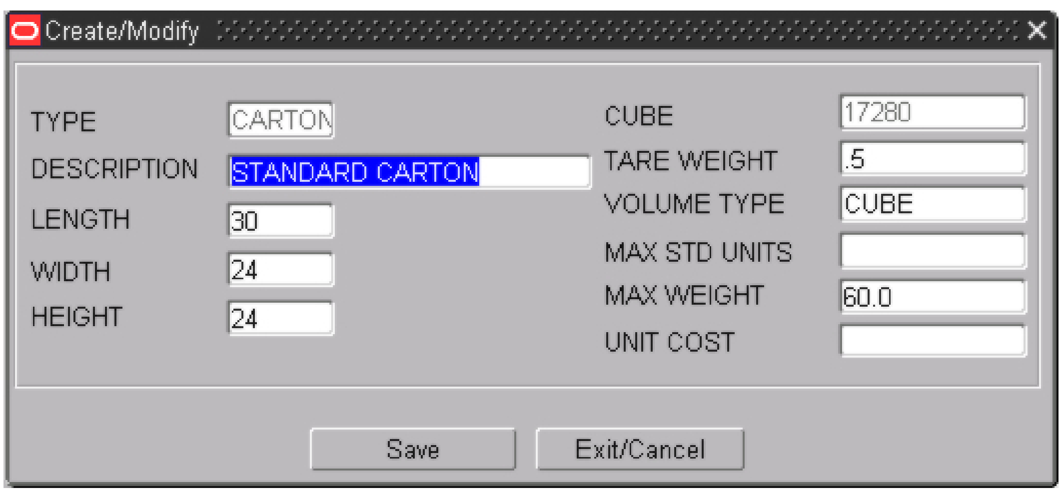



| TYPE | DESCRIPTION | LENGTH | WIDTH | HEIGHT | CUBE | TARE WEIGHT | VOLUME TYPE |
|---|---|---|---|---|---|---|---|
| CARTON | STANDARD CARTON | 30.00 | 24.00 | 24.00 | 17280.00 | .500 | CUBE |
| HDL | Heady Duty Large | 24.00 | 24.00 | 24.00 | 13824.00 | 1.000 | CUBE |
| HDM | Heavy Duty Medium | 24.00 | 12.00 | 12.00 | 3456.00 | 2.000 | CUBE |
| HDS | Heavy Duty Small | 7.00 | 7.00 | 7.00 | 343.00 | 3.000 | CUBE |
| HDXXL | Heady Duty XX Large | 30.00 | 24.00 | 16.00 | 11520.00 | 5.000 | CUBE |
| LGCART | Large Carton | 36.00 | 24.00 | 24.00 | 20736.00 | .500 | CUBE |
| PALLET | STANDARD PALLET | 50.00 | 50.00 | 50.00 | 125000.00 | 20.000 | CUBE |
| SMCART | Small Carton | 24.00 | 12.00 | 12.00 | 3456.00 | .500 | CUBE |
| SMTOTE | SMALL TOTE | 10.00 | 10.00 | 10.00 | 1000.00 | 5.000 | CUBE |
| TOTE | STANDARD TOTE | 18.00 | 12.00 | 12.00 | 2592.00 | 5.000 | CUBE |
| WLL | Wax Lined Large | 24.00 | 24.00 | 24.00 | 13824.00 | 3.000 | CUBE |
| WLM | Wax Lined Medium | 24.00 | 12.00 | 12.00 | 3456.00 | 30.000 | CUBE |
| WLS | Wax Lined Small | 7.00 | 7.00 | 7.00 | 343.00 | 3.000 | CUBE |
| WLXXL | Wax Lined XX Large | 30.00 | 24.00 | 16.00 | 11520.00 | 5.000 | CUBE |

**Container Type Editor Window**

### Edit a Container Type

1. On the Container Type Editor window, double-click the container type that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

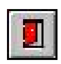
### Add a Container Type

1. On the Container Type Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Type and Description fields, enter the code and description for the container type.
3. In the Length, Width, and Height fields, enter the dimensions of the container.
4. In the Tare Weight field, enter the weight of the empty container.
5. In the Volume Type field, enter Unit or Cube to indicate the method used to determine whether a container is full.
6. If the Volume Type is Unit, enter the number of standard units that would fill a container in the Max Std Units field.
7. In the Max Weight field, enter the maximum weight that the container type can hold.
8. In the Unit Cost field, enter the cost per unit.
9. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Container Type

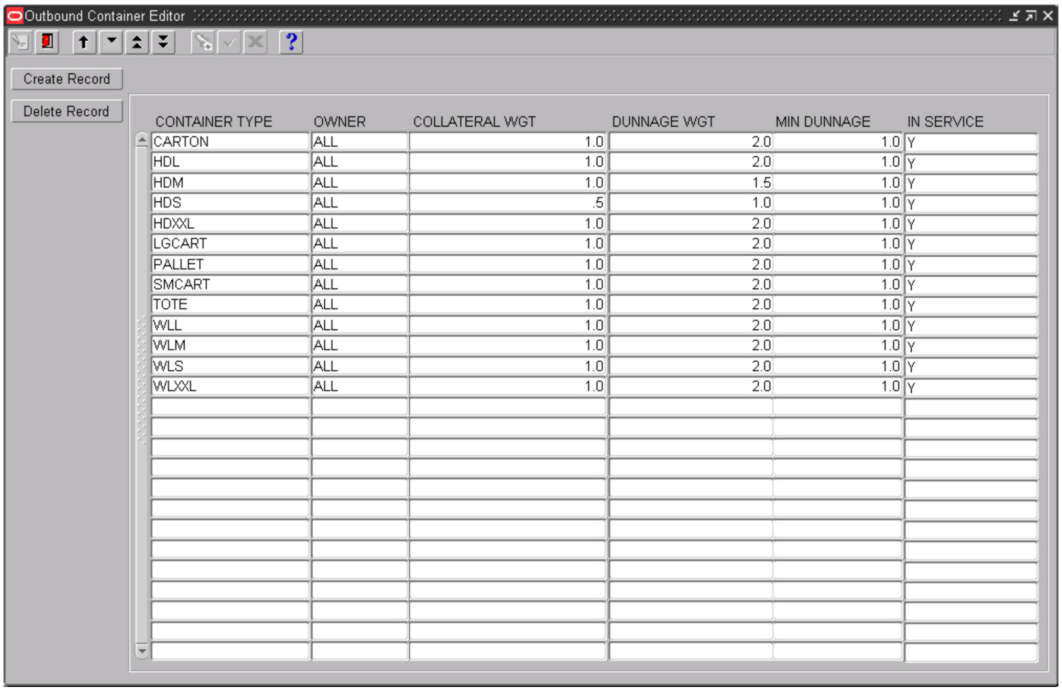
1. On the Container Type Editor window, select the container type that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Container Type Editor Window

- Click the exit  button to close the window.

## Maintain Outbound Containers

**Navigate:** From the main menu, select Support Functions > DC Setup > Outbound Container Editor. The current outbound container types appear in the Outbound Container Editor window.



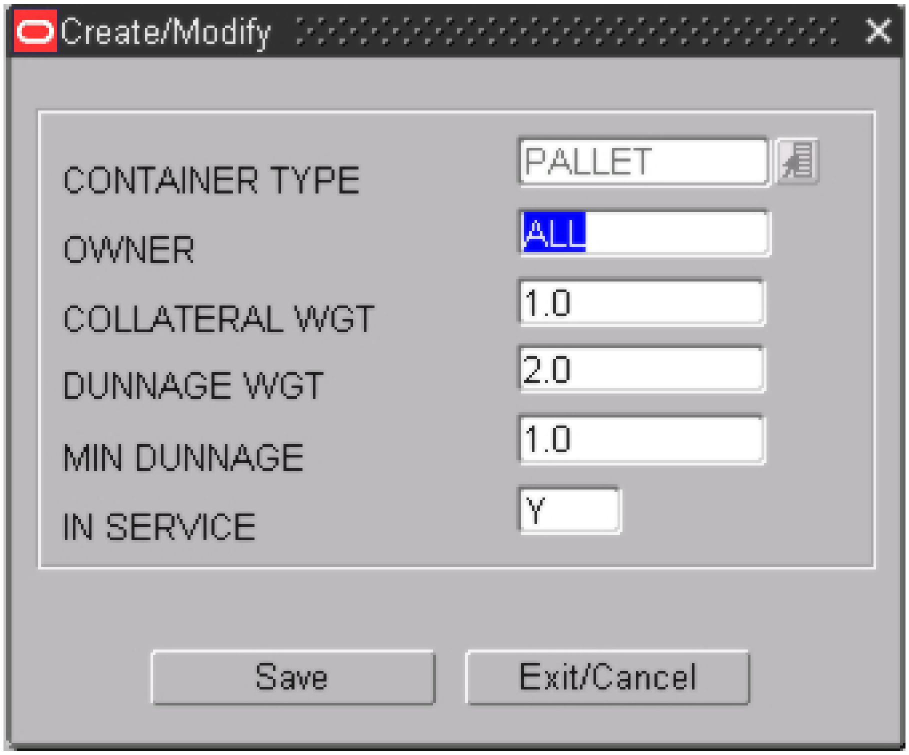
| CONTAINER TYPE | OWNER | COLLATERAL WGT | DUNNAGE WGT | MIN DUNNAGE | IN SERVICE |
|---|---|---|---|---|---|
| CARTON | ALL | 1.0 | 2.0 | 1.0 | Y |
| HDL | ALL | 1.0 | 2.0 | 1.0 | Y |
| HDM | ALL | 1.0 | 1.5 | 1.0 | Y |
| HDS | ALL | .5 | 1.0 | 1.0 | Y |
| HDXXL | ALL | 1.0 | 2.0 | 1.0 | Y |
| LGCART | ALL | 1.0 | 2.0 | 1.0 | Y |
| PALLET | ALL | 1.0 | 2.0 | 1.0 | Y |
| SMCART | ALL | 1.0 | 2.0 | 1.0 | Y |
| TOTE | ALL | 1.0 | 2.0 | 1.0 | Y |
| WLL | ALL | 1.0 | 2.0 | 1.0 | Y |
| WLM | ALL | 1.0 | 2.0 | 1.0 | Y |
| WLS | ALL | 1.0 | 2.0 | 1.0 | Y |
| WLXXL | ALL | 1.0 | 2.0 | 1.0 | Y |



**Outbound Container Editor Window**

### Edit an Outbound Container Type

1. On the Outbound Container Editor window, double-click the container type that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

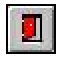
### Add an Outbound Container Type

1. On the Outbound Container Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Container Type field, enter the ID of a container type, or click the LOV  button and select the container type.
3. In the Owner field, enter the name of an owner if applicable. Otherwise, enter ALL.
4. In the Collateral Wgt field, enter the weight of advertisements, flyers, or other such materials that are expected to be included in the container.
5. In the Dunnage Wgt field, enter the weight of the packing materials.
6. In the Min Dunnage Wgt field, enter the least amount of dunnage expected.
7. In the In Service field, enter Y (Yes) to place the outbound container type in service. Otherwise, enter N (No).
8. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Container Type

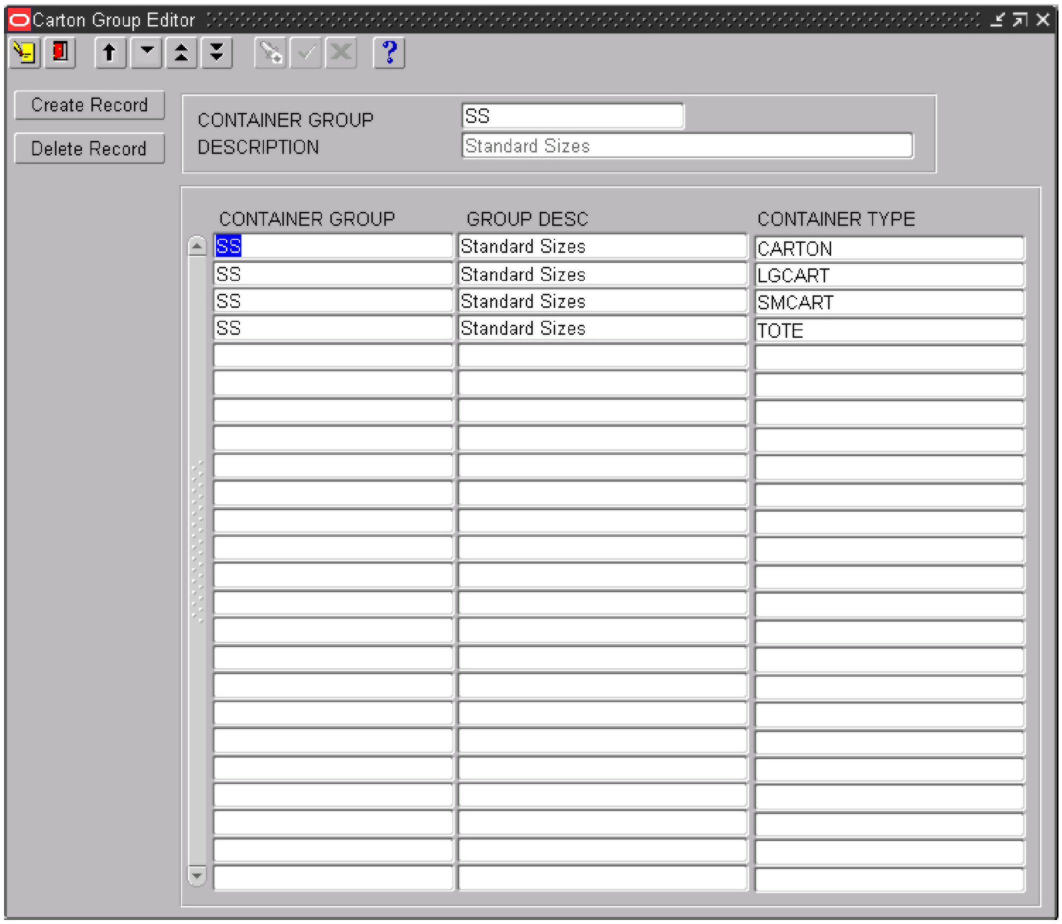
1. On the Outbound Container Editor window, select the outbound container type that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Outbound Container Editor Window

- Click the exit  button to close the window.

## Maintain Carton Groups

**Navigate:** From the main menu, select Support Functions > DC Setup > Carton Group Editor. The Carton Group Editor window opens.




**Carton Group Editor Window**

### Display All Carton Groups

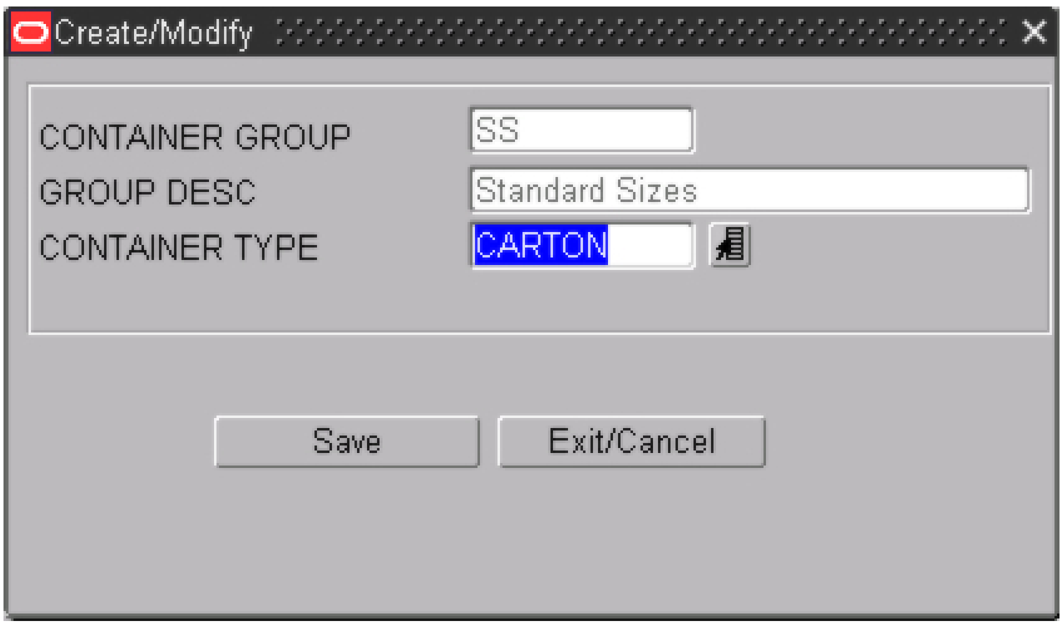
- Click the execute query  button.

### Display a Carton Group

1. If any carton groups are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Container Group query field, enter the code for the carton group, or click the LOV button and select carton group.
4. Click the execute query button. The container types in the selected carton group appear.

### Edit a Carton Group

1. On the Carton Group Editor window, double-click the carton group that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the container type as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Carton Group

You can also use this procedure to add another container type to an existing carton group.

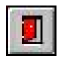
1. On the Carton Group Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Container Group and Group Desc fields, enter a code and description for the carton group.
3. In the Container Type field, enter the code of the container type that you want to associate with the carton group, or click the LOV button and select the container type.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Carton Group

You can also use this procedure to delete a container type from a carton group.

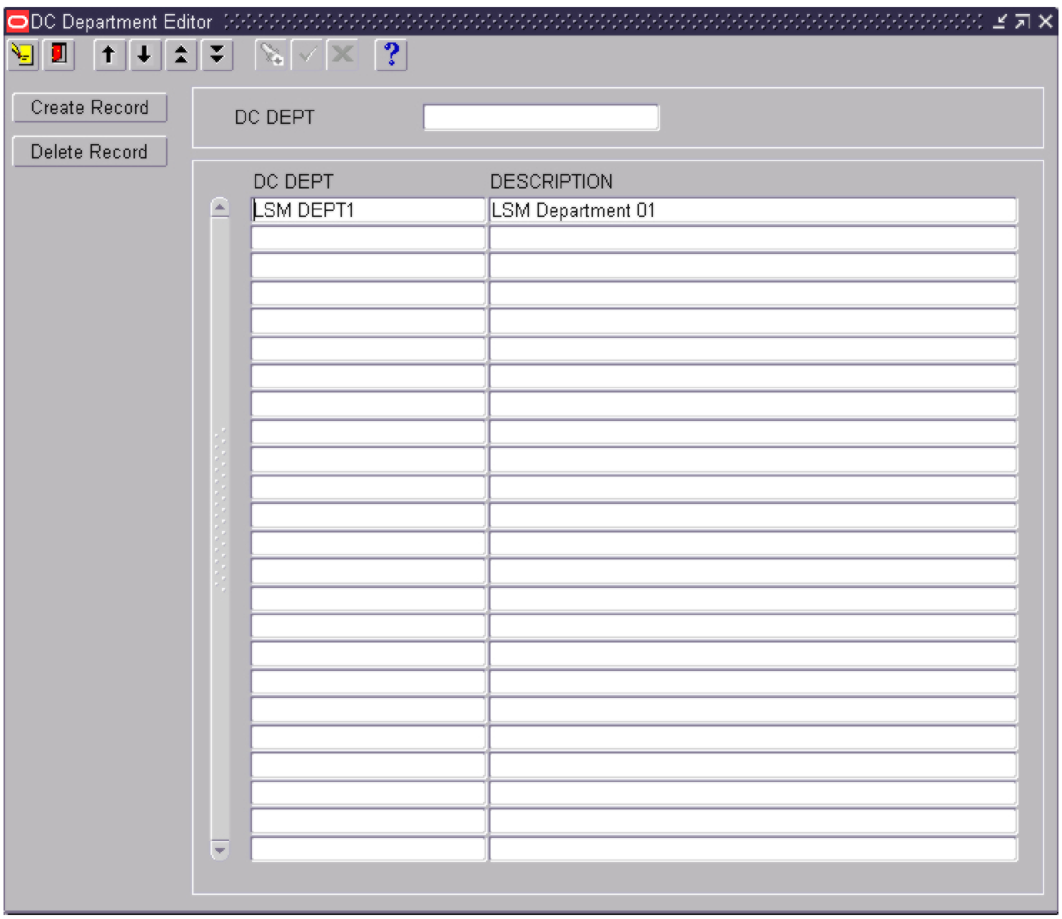
1. On the Carton Group Editor window, select the container group/container type record that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Carton Group Editor Window

- Click the exit  button to close the window.

## Maintain DC Departments

**Navigate:** From the main menu, select Support Functions > DC Setup > DC Department Editor. The DC Department Editor window opens.




**DC Department Editor Window**

### Display All Departments

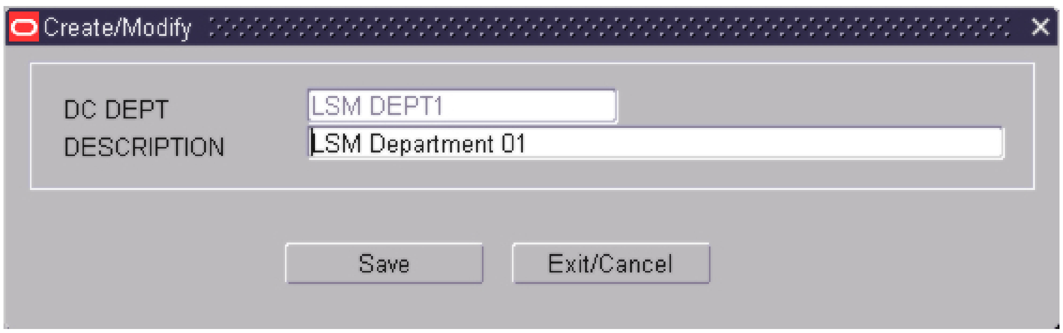
- Click the execute query  button.

### Display a Department

1. If any departments are currently displayed, click the clear button.
2. Click the enter query button.
3. In the DC Department query field, enter the name of the department, or click the LOV button and select the department.
4. Click the execute query button. The department that matches the search criterion opens.

### Edit a Department

1. On the DC Department Editor window, double-click the department that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Department

1. On the DC Department Editor window, click **Create Record**. The Create/Modify window opens.
2. In the DC Dept and Description fields, enter a name and description for the department.
3. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Department

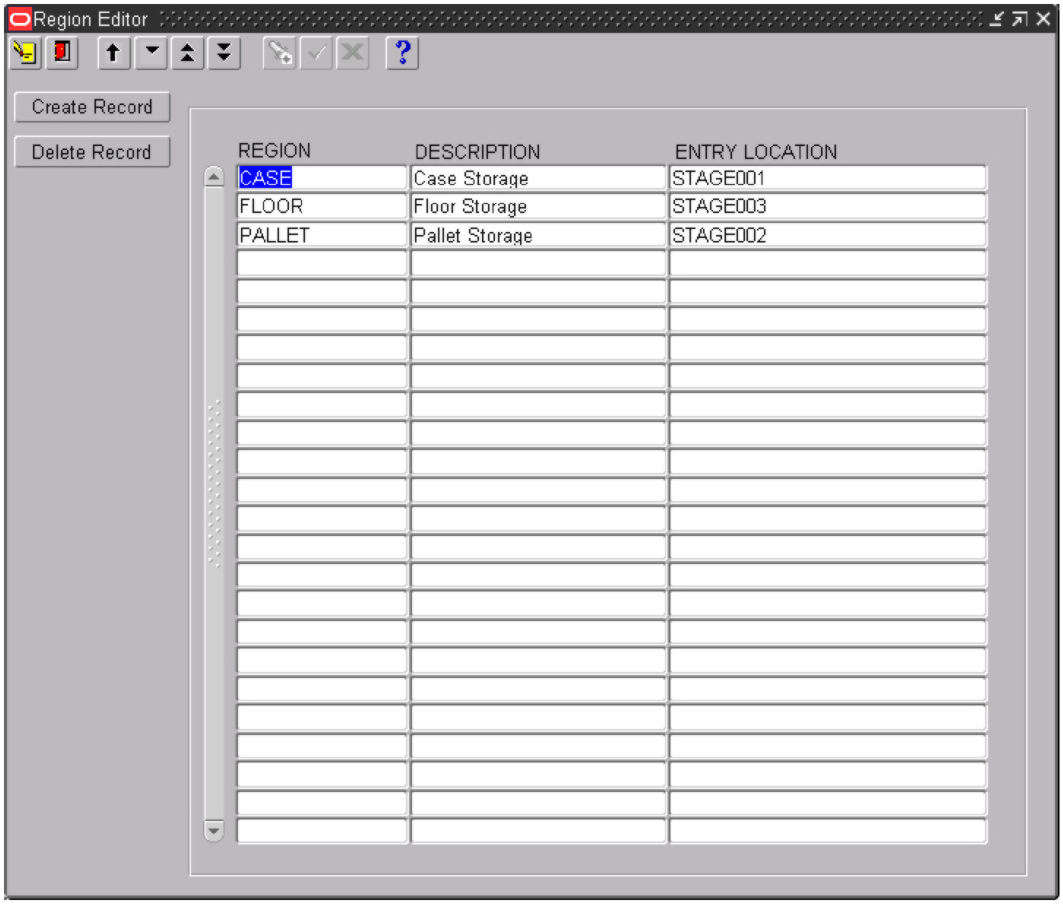
1. On the DC Department Editor window, select the department that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the DC Department Editor Window

- Click the exit button to close the window.

## Maintain Regions

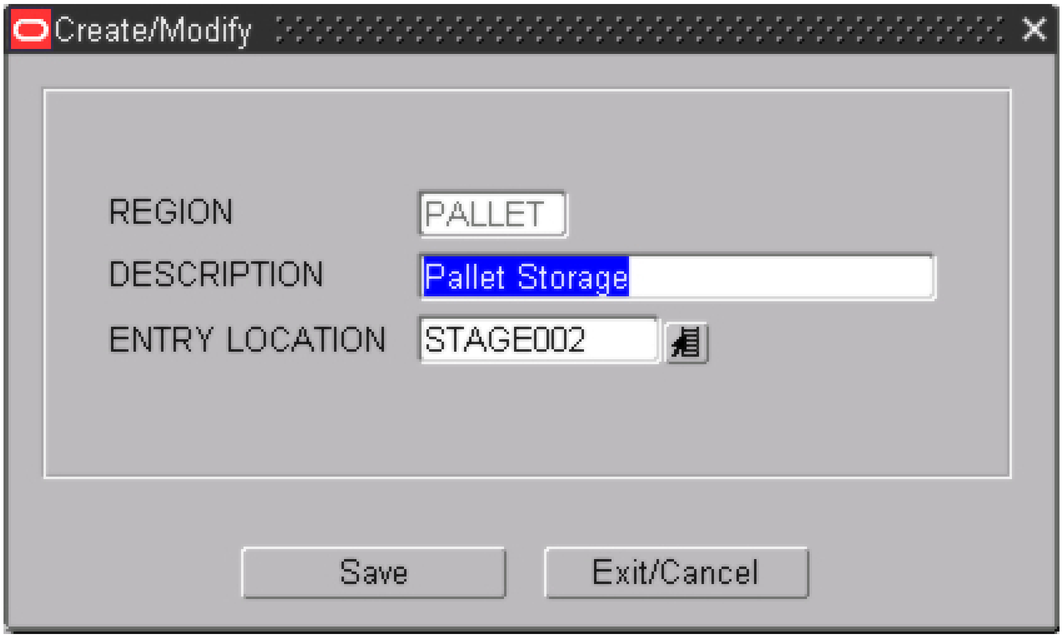
**Navigate:** From the main menu, select Support Functions > DC Setup > Region Editor. The current regions appear in the Region Editor window.




**Region Editor Window**

### Edit a Region

1. On the Region Editor window, double-click the region that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description and entry location as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

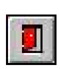
### Add a Region

1. On the Region Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Region field, enter a code for the region.
3. In the Description field, enter a description of the region.
4. In the Entry Location field, enter the ID of the location where containers enter the region.
5. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Region

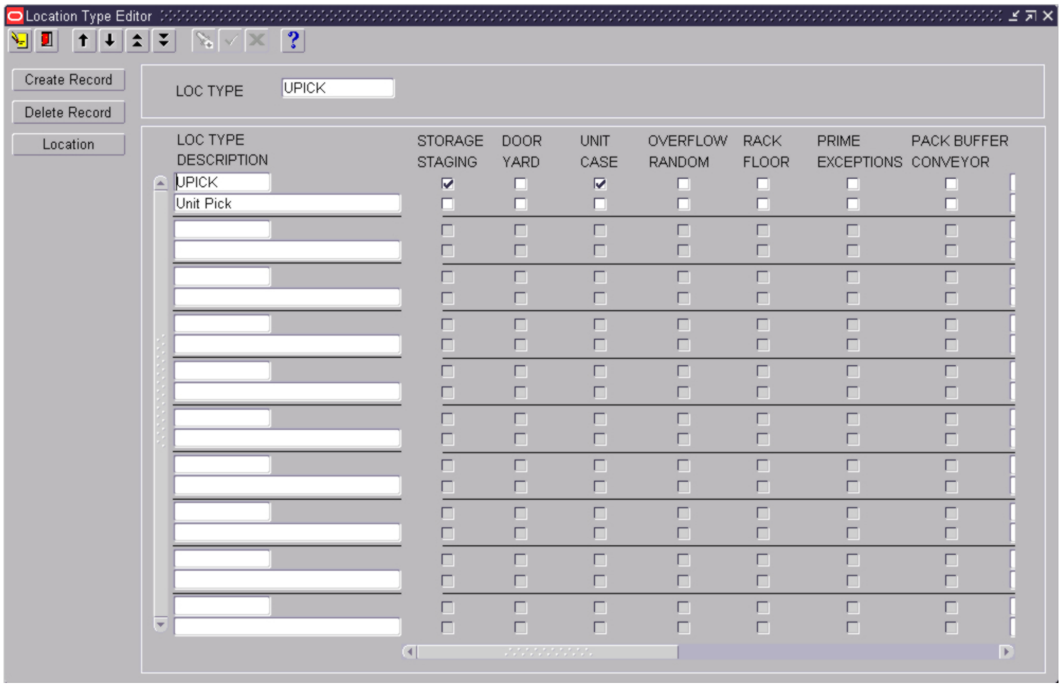
1. On the Region Editor window, select the region that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Region Editor Window

- Click the exit  button to close the window.

## Maintain Location Types

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Location Type Editor. The Location Type Editor window opens.




**Location Type Editor Window**

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**Note:** You can also access this window from the Location Editor window.

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### Display all Location Types

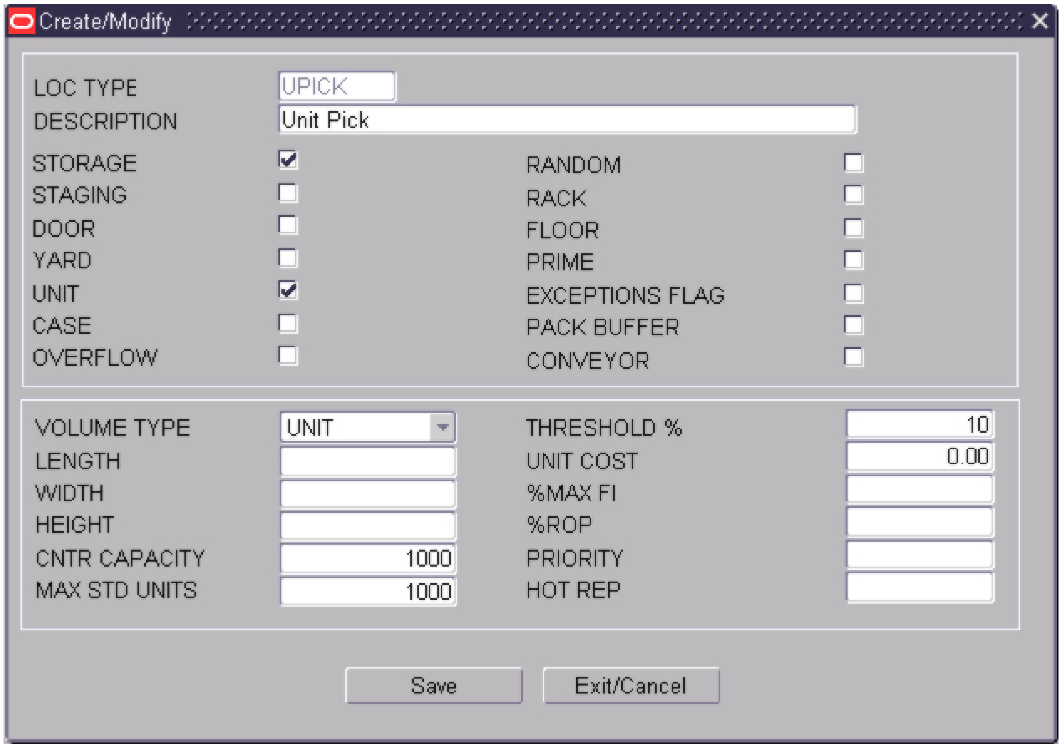
- Click the execute query  button.

### Display a Location Type

1. If any location types are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Loc Type query field, enter the name of the location type, or click the LOV  button and select the location type.
4. Click the execute query  button. The location type that matches the search criterion opens.

### Edit a Location Type

1. On the Location Type Editor window, double-click the location type that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the physical characteristics as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Location Type

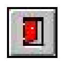
1. On the Location Type Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Loc Type and Description fields, enter a name and description for the location type.
3. Select the check box next to each physical characteristic that applies to the location type.
4. In the Volume Type field, enter either Cube or Unit as the determining factor for space availability.
   - If Unit, enter the maximum number of standard units in the Max Std Units field.
   - If Cube, enter the length, width, and height in the appropriate fields.
5. In the Cntr Capacity field, enter the number of containers that fit at the location type.
6. In the Threshold % field, enter the maximum utilization percentage. When utilization falls below the threshold, the location will appear on the Space Utilization report.
7. In the Unit Cost field, enter the cost of storage per unit.
8. In the % Max Fill and % ROP fields, enter the percentages for 1) filling locations beyond the baseline capacity and 2) triggering reorders. These pertain to unit pick locations that are set up as auto-slottable.

9. In the Priority (% Priority ROP Task) field, enter the percentage of capacity at which replenishment tasks become a higher priority. This pertains to unit pick locations.
10. In the Hot Rep (% Hot Replenishment) field, enter the percentage of capacity at which to trigger hot replenishment requests. This pertains to unit pick locations that are set up as auto-slottable.
11. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Location Type

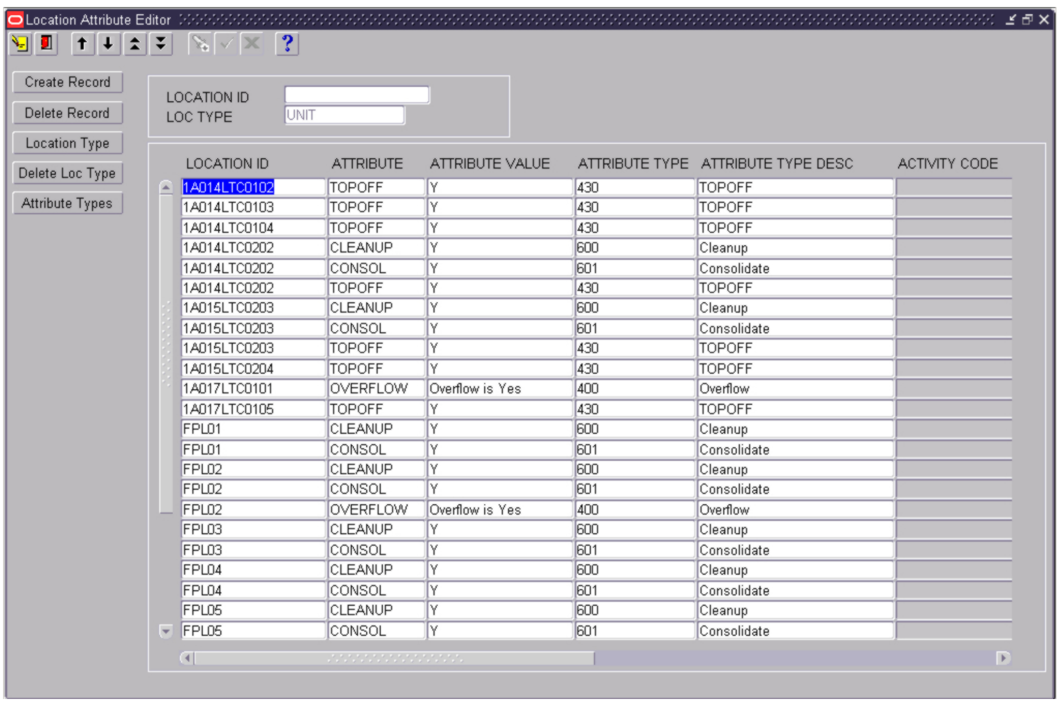
1. On the Location Type Editor window, select the location type that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Location Type Editor Window

- Click the exit  button to close the window.

## Maintain Location Attributes

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Location Attribute Editor. The Location Attribute Editor window opens.




**Location Attribute Editor Window**

> **Note:** You can also access this window from the Location Editor window.

### Display Location Attributes

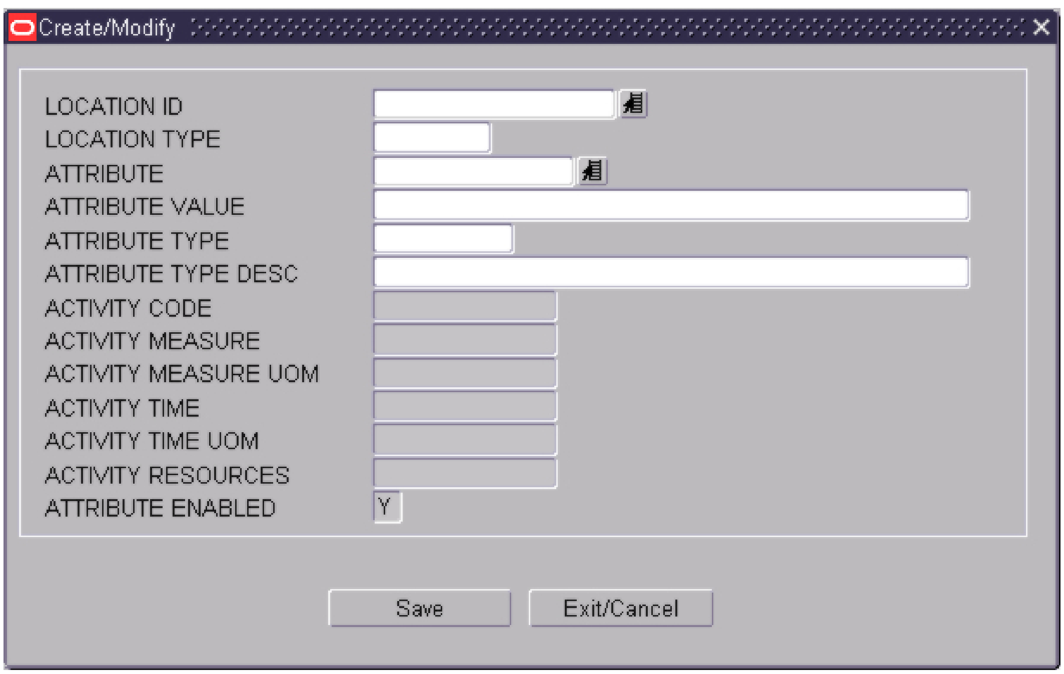
1. If location attributes are currently displayed, click the clear button.
2. Click the enter query button.
3. To search for a specific location, enter the location ID in the Location ID query field, or click the LOV button and select a location.
   To search for all locations of the same type, enter the ID of the location type in the Loc Type query field, or click the LOV button and select a location type.
4. Click the execute query button. The attributes associated with the selected location or locations appear.

### Edit a Location Attribute

1. On the Location Attribute Editor window, double-click the location attribute that you want to edit. The Create/Modify window opens.
2. Select or clear the Attribute Enabled check box as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Assign an Attribute to a Location

1. On the Location Attribute Editor window, click **Create Record**. The Create/Modify window opens.




**Create/Modify Window**

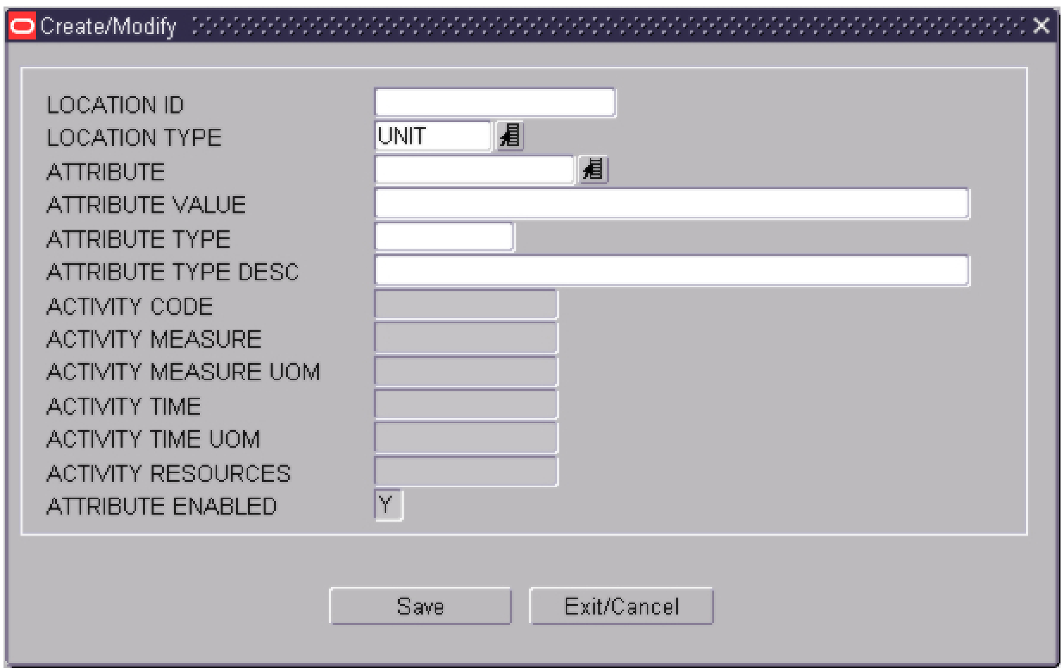
2. In the Attribute field, enter the ID of the attribute that you want to associate with the current location, or click the LOV button and select the attribute.

> **Note:** If no location was identified on the Location Attribute Editor window, enter the ID of the location in the Location ID field on the Create/Modify window.

3. To make the location attribute available to users, select the Attribute Enabled check box.
4. Click **Save** to save the changes and close the Create/Modify window.

### Assign an Attribute to Multiple Locations

1. On the Location Attribute Editor window, click **Create Loc Type**. The Create/Modify window opens.




**Create/Modify Window**

2. In the Attribute field, enter the ID of the attribute that you want to associate with the current location type, or click the LOV button and select the attribute.

> **Note:** If no location type was identified on the Location Attribute Editor window, enter the ID of the location type in the Location Type field on the Create/Modify window.

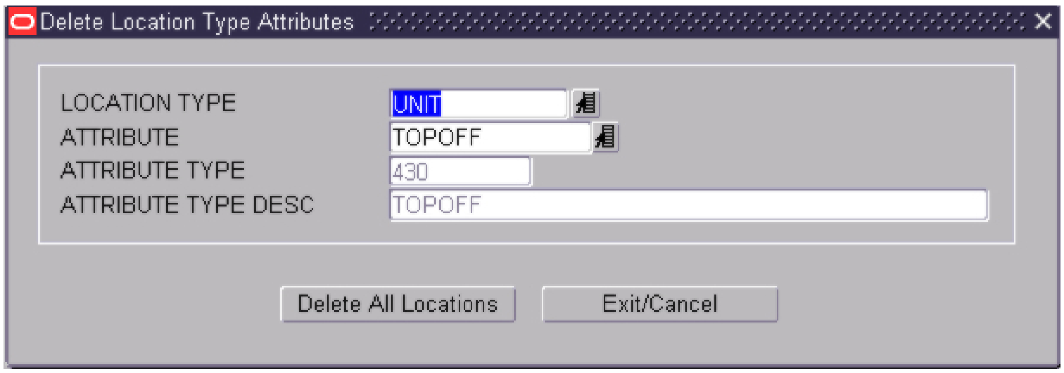
3. To make the location attribute available to users, select the Attribute Enabled check box.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete an Attribute for a Location

1. On the Location Attribute Editor window, select the location attribute that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Delete an Attribute for Multiple Locations

1. On the Location Attribute Editor window, click **Delete Loc Type**. The Delete Location Type Attributes window opens.




**Delete Location Type Attributes Window**

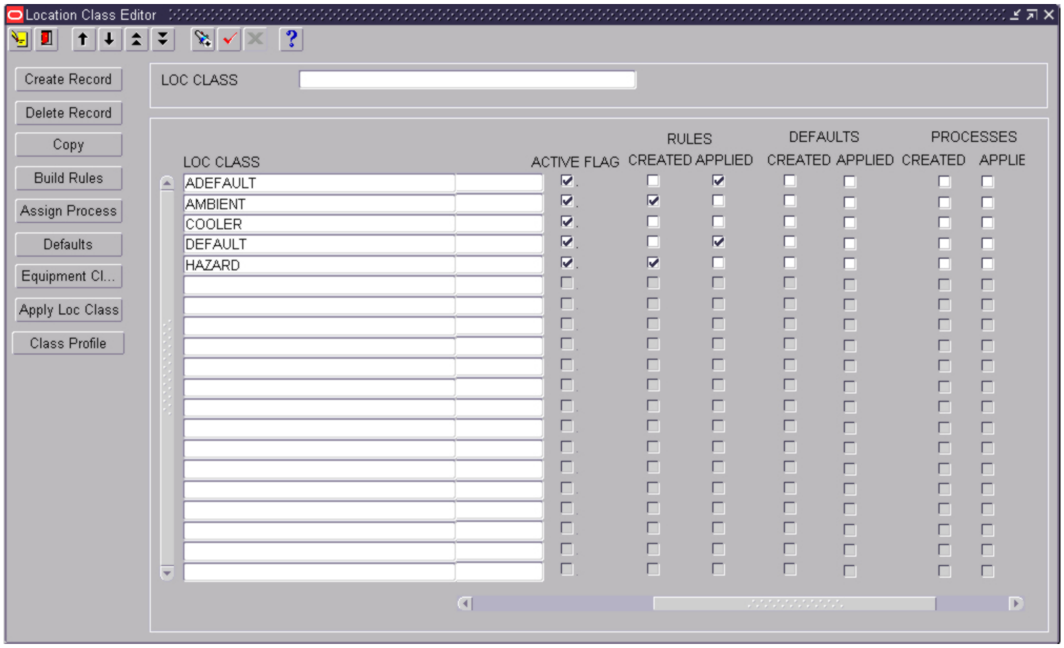
2. In the Location Type field, enter the ID of the location type, or click the LOV button and select the location type.
3. In the Attribute field, enter the code for an attribute, or click the LOV button and select the attribute.
4. Click **Delete All Locations**. The attribute is deleted from all locations of the selected type.

### Exit the Location Attribute Editor Window

- Click the exit button to close the window.

## Maintain Location Classes

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Location Class Editor. The Location Class Editor window opens.




**Location Class Editor Window**

### Display all Location Classes

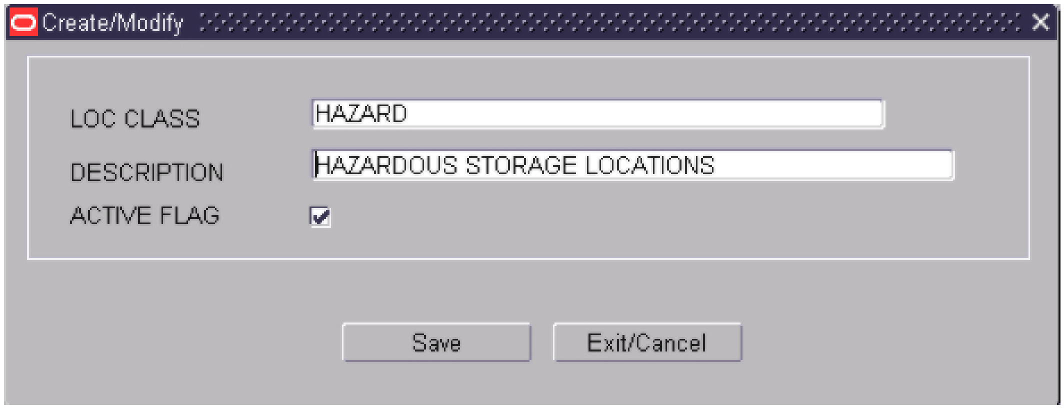
- Click the execute query  button.

### Display a Location Class

1. If any location classes are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Loc Class query field, enter the name of the location class, or click the LOV  button and select the location class.
4. Click the execute query  button. The location class that matches the search criterion opens.

### Edit a Location Class

1. On the Location Class Editor window, double-click the location class that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

> **Note:** You can not edit a location class if the system indicator is selected.

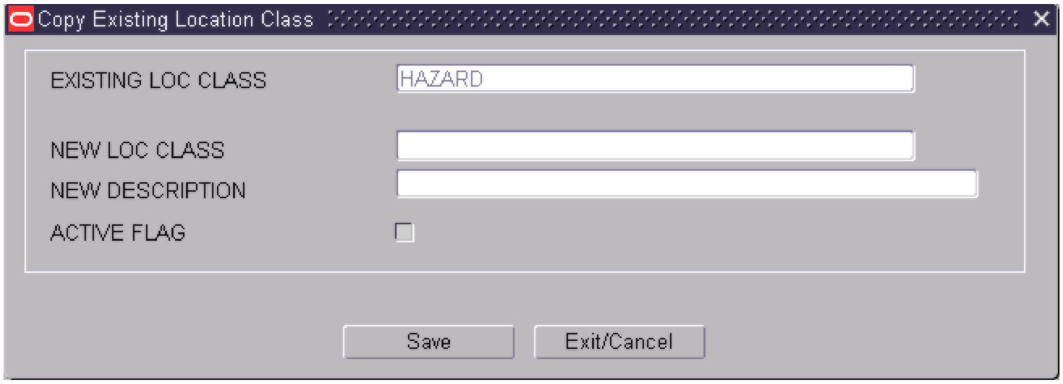
2. Edit the description and active status of the location class as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.
4. Edit the following as necessary:
   - Build rules
   - Default characteristics
   - Processes
   - Equipment classes

### Add a Location Class

1. On the Location Class Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Loc Class and Description fields, enter the name and description for the location class.
3. To indicate whether the location class should be made available for use, select or clear the Active Flag check box.
4. Click **Save** to save any changes and close the Create/Modify window.
5. Set up the following as necessary:
   - Build rules
   - Default characteristics
   - Processes
   - Equipment classes

### Copy a Location Class

1. On the Location Class Editor window, select the location class that you want to copy.
2. Click **Copy**. The Copy Existing Location Class window opens.




**Copy Existing Location Class Window**

3. In the New Loc Class and New Description fields, enter a name and description for the location class that you want to create.
4. Click **Save** to copy the selected location class and close the Copy Existing Location Class window.
5. Edit the following as necessary:
   - Build rules
   - Default characteristics
   - Processes
   - Equipment classes

### Delete a Location Class

1. On the Location Class Editor window, select the location class that you want to delete.

   > **Note:** You can not delete a location class if the system indicator is selected or if any build rules, defaults, processes, or equipment classes have been assigned to the location class.

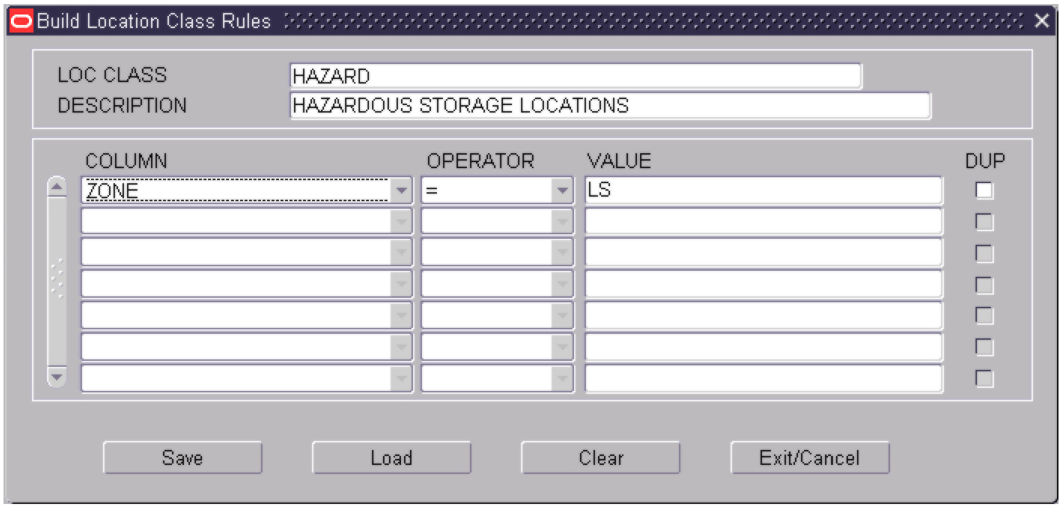
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Location Class Editor Window

- Click the exit  button to close the window.

## Build Location Class Rules

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Location Class Editor. The Location Class Editor window opens.



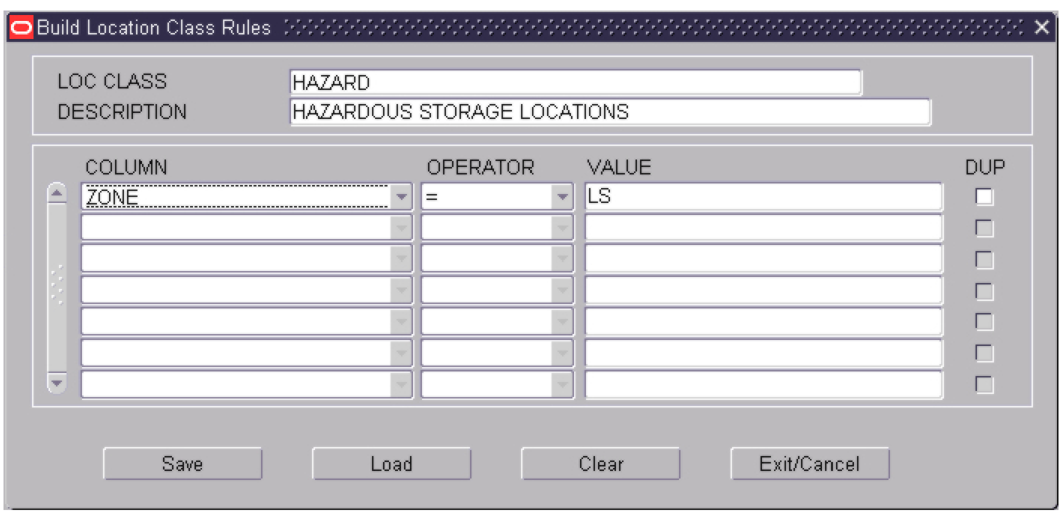

**Location Class Editor Window**

### Display All Location Classes

- Click the execute query  button.

### Build the Rules for a Location Class

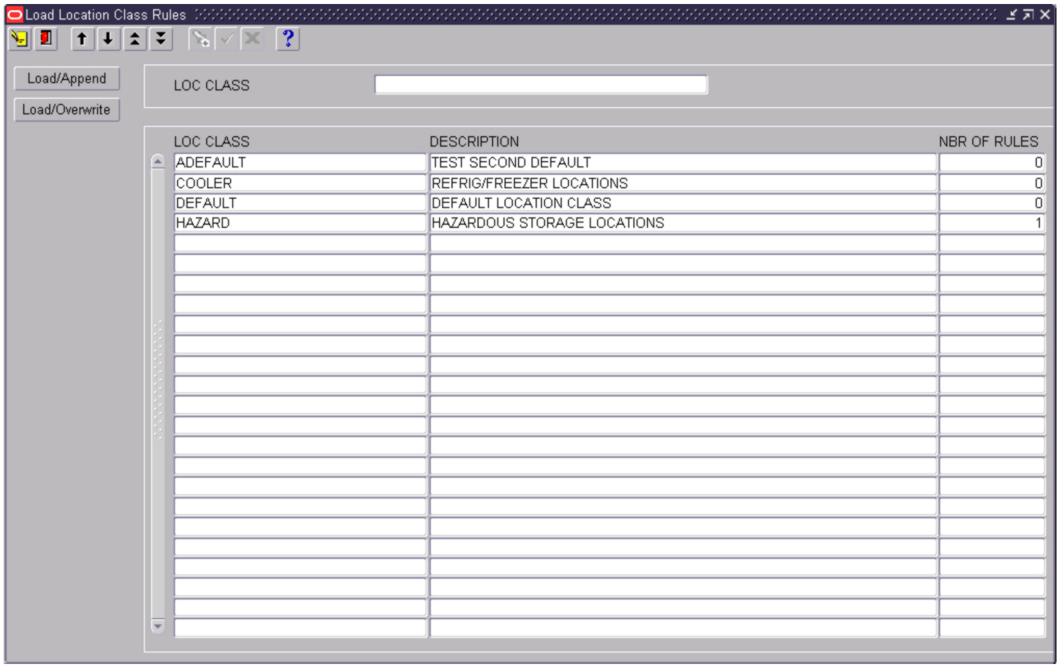
1. On the Location Class Editor window, select the location class that you want to edit.
2. Click **Build Rules**. The Build Location Class Rules window opens.




**Build Location Class Rules Window**

3. Define the rules for selecting the members of the location class:
   a. In the Column fields, select the limiting factors.
   b. In the Operator fields, select the relational operators.
   c. In the Value fields, enter the values of the limiting factors.

4. [Optional] To copy the rules from another location class:
   a. On the Build Location Class Rules window, click **Load**. The Load Location Class Rules window opens.




**Load Location Class Rules Window**

   b. Select the location class whose rules you want to copy.

> **Note:** To view the rules for a location class, double-click the desired location class. The rules appear in the Location Class Rules View Only window.

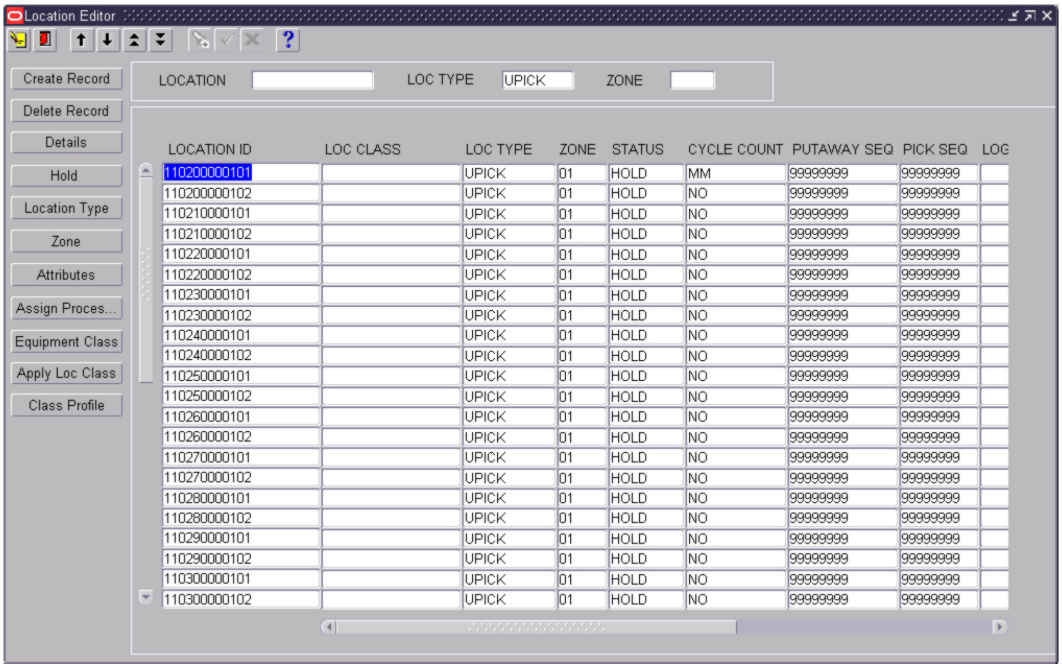
   c. Click **Load/Append** to add the rules to any existing rules, or click **Load/Overwrite** to replace any existing rules with the selected rules. You are returned to the Build Location Class Rules window.
   d. If by appending the rules any duplicates occur, the Dup check box is selected next to the duplicate. Select the duplicate rule and click **Clear** to remove it.
5. Click **Save** to save the rules and close the Build Location Class Rules window.

### Exit the Location Class Editor Window

- Click the exit  button to close the window.

# Maintain Locations

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Location Table Editor. The Location Editor window opens.




**Location Editor Window**

> **Note:** You can also access this window from the Location Type Editor window.

## Display All Locations

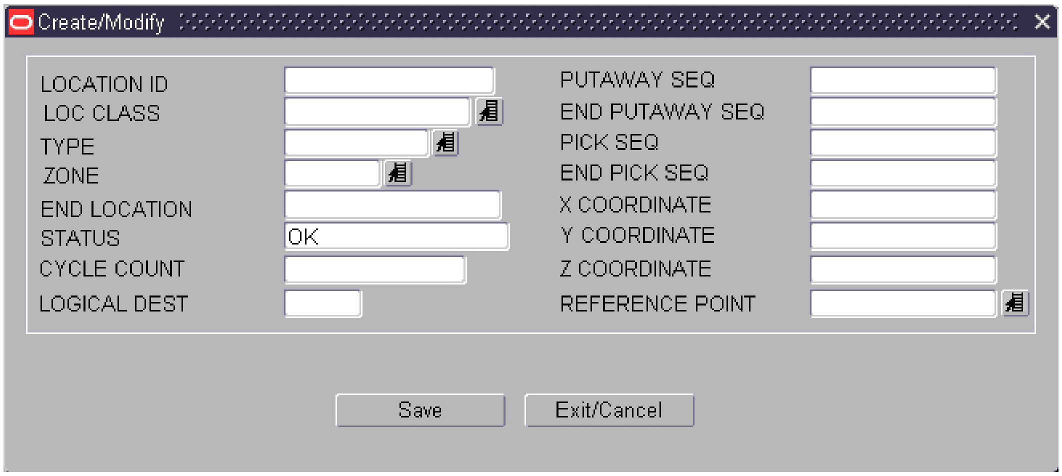
- To display all locations, click the execute query  button.

## Display a Subset of Locations

1. If any locations are currently displayed, click the clear  button.
2. Click the enter query  button.
3. Enter criteria in the Location, Loc Type, or Zone query fields.
4. Click the execute query  button. The locations that match the criteria appear.

### Edit one or Multiple Locations

1. On the Location Editor window, double-click the location that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. To apply the edits to multiple locations, enter the last location ID in a series in the End Location field.
3. Edit the enabled fields as necessary.
4. Click **Save** to save any changes and close the Create/Modify window.

### Change the Status of Locations in a Zone

Locations are put on hold to temporarily divert the flow of putaway merchandise to other zones.

1. On the Location Editor window, click **Hold**. The Hold window opens.


**Hold Window**

2. In the Zone field, enter the ID of the affected zone, or click the LOV  button and select the zone.
3. Click **Toggle**. If the status of the locations was OK, it becomes Hold. If the status was Hold, it becomes OK.

### Add one or Multiple Locations

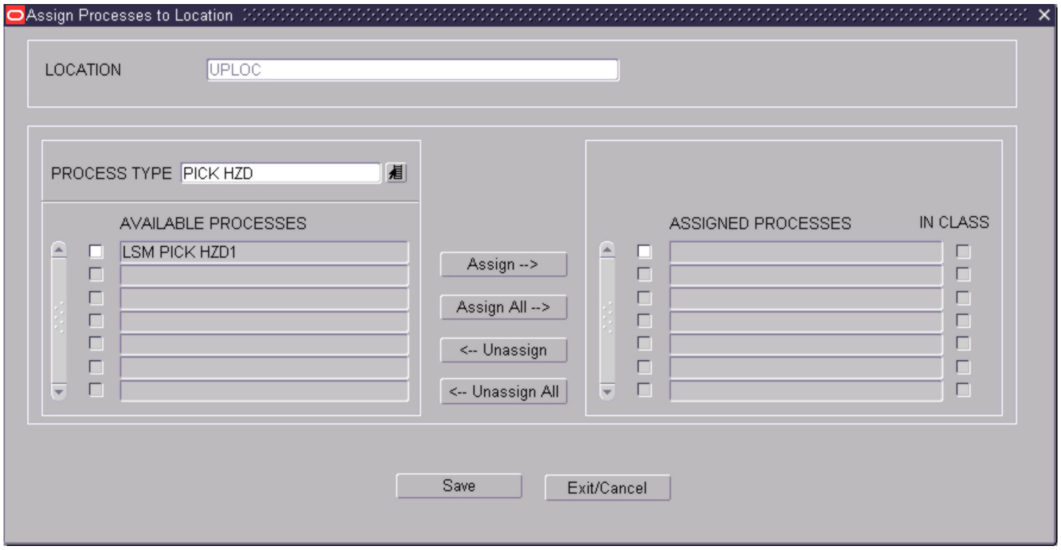
1. On the Location Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Location ID field, enter the ID of the location. (For multiple locations, enter the first ID in a series.)
3. In the Loc Class, Type, and Zone fields, enter the names of the location class, location type, and pick/distribution zone that you want to associate the location with.
4. To add multiple locations, enter the last location ID in a series in the End Location field.
5. In the Status field, edit the status of the location if other than OK.
6. In the Cycle Count field, enter No.
7. In the Putaway Seq and Pick Seq fields, enter the sequence number for putaway and pick purposes. (For multiple locations, enter the first sequence number in a series.)

> **Note:** If the sequence number is not unique, then the priority is by sequence number and location ID.

8. When adding multiple locations, enter the last sequence number in a series in the End Putaway Seq and End Pick Seq fields.
9. In the X, Y, and Z Coordinate fields, enter the coordinates of the location.
10. In the Reference Point field, enter the reference point ID, or click the LOV button and select a reference point.
11. Click **Save** to save the changes and close the Create/Modify window.

### Assign Processes

1. On the Location Editor window, select the location that you want to edit.
2. Click **Assign Process**. The Assign Processes to Location window opens.




**Assign Processes to Location Window**

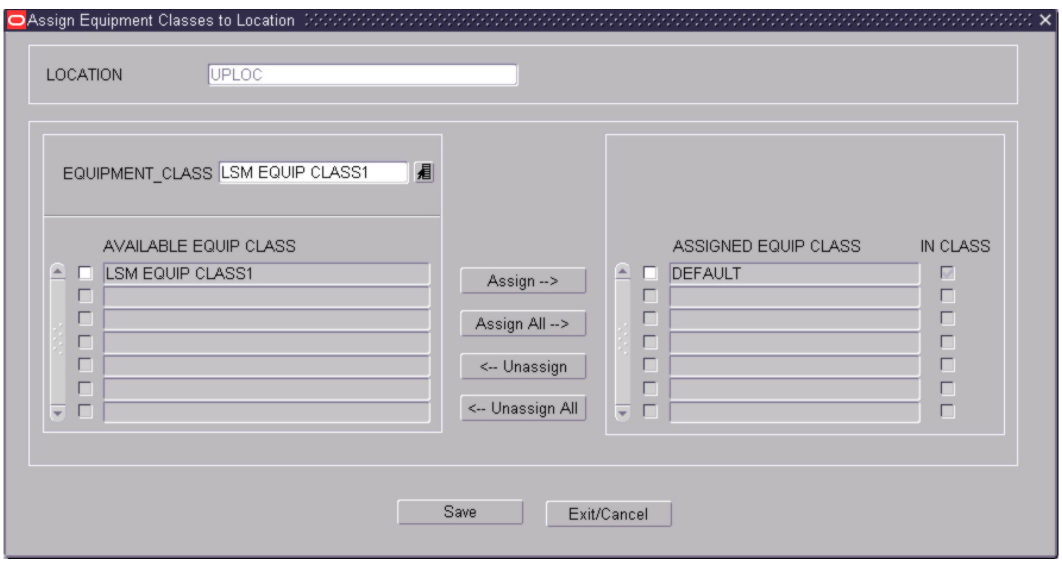
3. [Optional] To filter the processes listed in the Available Processes table, enter the name of a process type in the Process Type field, or click the LOV button and select the process type.

4. To assign processes:
   a. Select the check box next to the desired processes on the Available Processes table.
   b. Click **Assign**. The selected equipment classes are moved to the Assigned Processes table.
5. To remove assigned processes:
   a. Select the check box next to the desired processes on the Assigned Processes table.
   b. Click **Unassign**. The selected processes are moved to the Available Processes table.
6. To make the assigned processes available to users, select the Active check box next the appropriate processes.
7. Click **Save** to save any changes and close the Assign Processes to Location window.

> **Note:** In the Assign Processes to Location window, you can 1) click **Assign All** to move all processes to the Assigned Processes table or 2) click **Unassign All** to move all processes to the Available Processes table. All processes are moved whether or not the check boxes are selected.

## Assign Equipment Classes

1. On the Location Editor window, select the location that you want to edit.
2. Click **Equipment Class**. The Assign Equipment Classes to Location window opens.




**Assign Equipment Classes to Location Window**

3. [Optional] To filter the equipment classes listed in the Available Equip Class table, enter the name of a equipment class in the Equipment Class field, or click the LOV  button and select the equipment class.
4. To assign equipment classes:
   a. Select the check box next to the desired equipment classes on the Available Equip Class table.

   b. Click **Assign**. The selected processes are moved to the Assigned Equip Class table.

5. To remove assigned equipment classes:
   a. Select the check box next to the desired equipment classes on the Assigned Equip Class table.
   b. Click **Unassign**. The selected equipment classes are moved to the Available Equip Class table.
6. Click **Save** to save any changes and close the Assign Equipment Classes to Location window.

> **Note:** In the Assign Equipment Classes to Location window, you can 1) click **Assign All** to move all equipment classes to the Assigned Equip Class table or 2) click **Unassign All** to move all equipment classes to the Available Equip Class table. All equipment classes are moved whether or not the check boxes are selected.

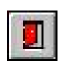
### Delete a Location

1. On the Location Editor window, select the location that you want to delete.

> **Note:** You can not delete a location if any processes or equipment classes have been assigned to the location class.

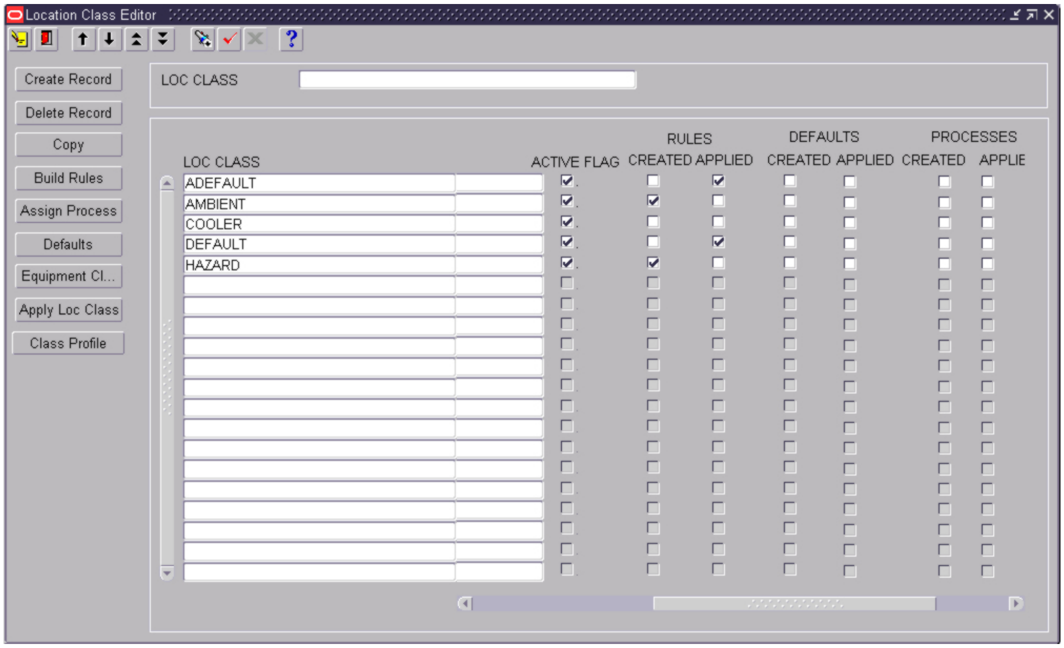
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Location Editor Window

- Click the exit  button to close the window.

## Assign Location Class Defaults

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Location Class Editor. The Location Class Editor window opens.



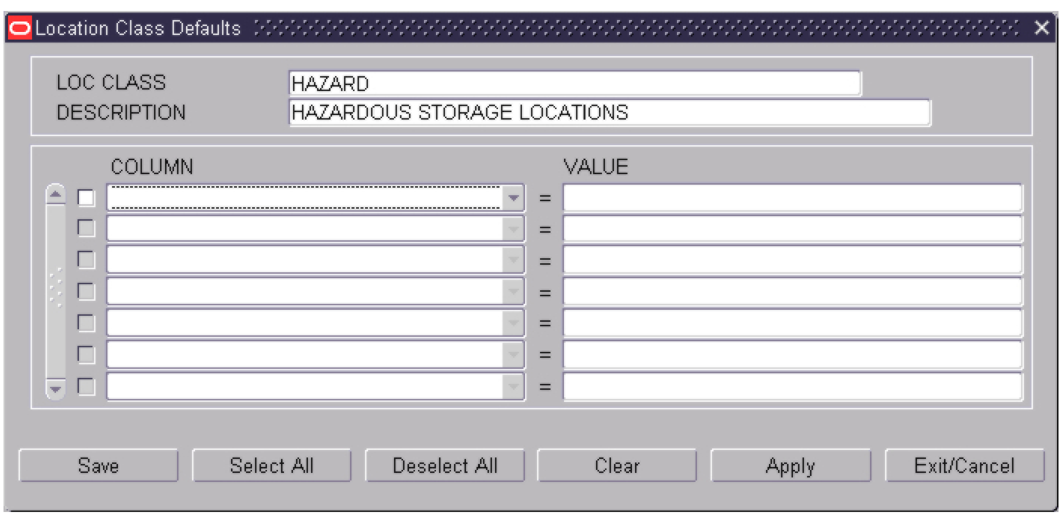

**Location Class Editor Window**

### Display All Location Classes

- Click the execute query  button.

### Assign Defaults

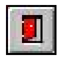
1. On the Location Class Editor window, select the location class that you want to edit.
2. Click **Defaults**. The Location Class Defaults window opens.




**Location Class Defaults Window**

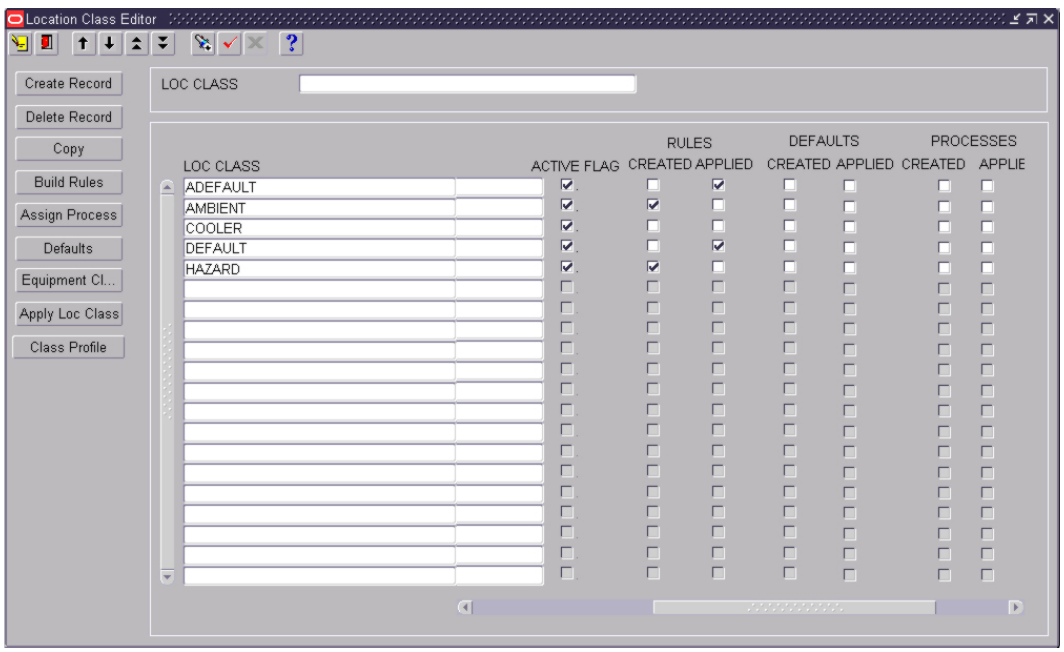
3. To add a default:
   a. In the Column field, select the desired characteristic from the drop-down list.
   b. In the Value field, enter the values of the characteristic.
4. To remove a default:
   a. Select the desired characteristic.
   b. Click **Clear**. The record is removed from the table.
5. [Optional] To apply the defaults to the locations that are currently assigned to the location class, click **Apply**.
6. Click **Save** to save the defaults and close the Location Class Defaults window.

### Exit the Location Class Editor Window

- Click the exit  button to close the window.

## Assign Location Class Processes

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Location Class Editor. The Location Class Editor window opens.



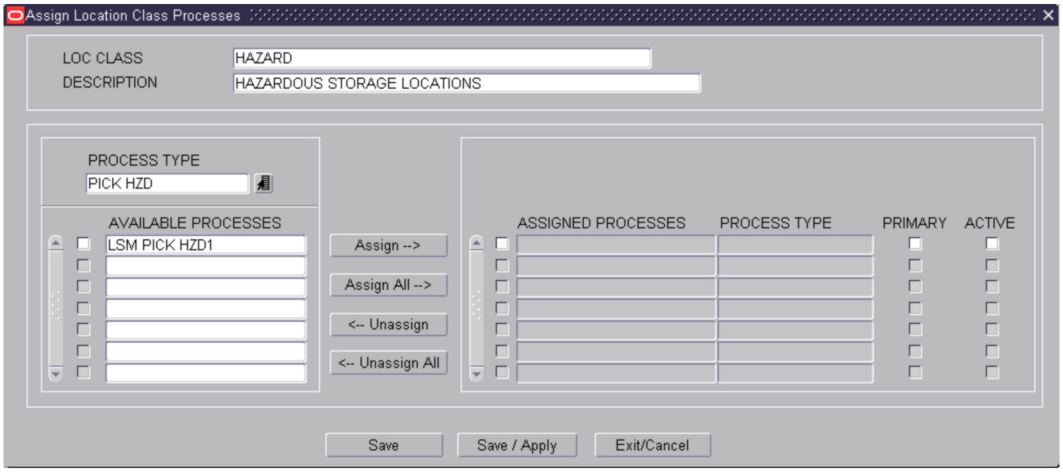

**Location Class Editor Window**

### Display All Location Classes

- Click the execute query  button.

### Assign Processes

1. On the Location Class Editor window, select the location class that you want to edit.
2. Click **Assign Process**. The Assign Location Class Processes window opens.




**Assign Location Class Processes Window**

3. [Optional] To filter the processes listed in the Available Processes table, enter the name of a process type in the Process Type field, or click the LOV  button and select the process type.
4. To assign processes:
   a. Select the check box next to the desired processes on the Available Processes table.
   b. Click **Assign**. The selected processes are moved to the Assigned Processes table.
5. To remove assigned processes:
   a. Select the check box next to the desired processes on the Assigned Processes table.
   b. Click **Unassign**. The selected processes are moved to the Available Processes table.
6. A location class may have multiple processes. Select the Primary check box next to the assigned processes which are considered to be the primary processes.
7. [Optional] To apply the processes to the locations that are currently assigned to the location class, click **Save/Apply**.
8. Click **Save** to save any changes and close the Assign Location Class Processes window.

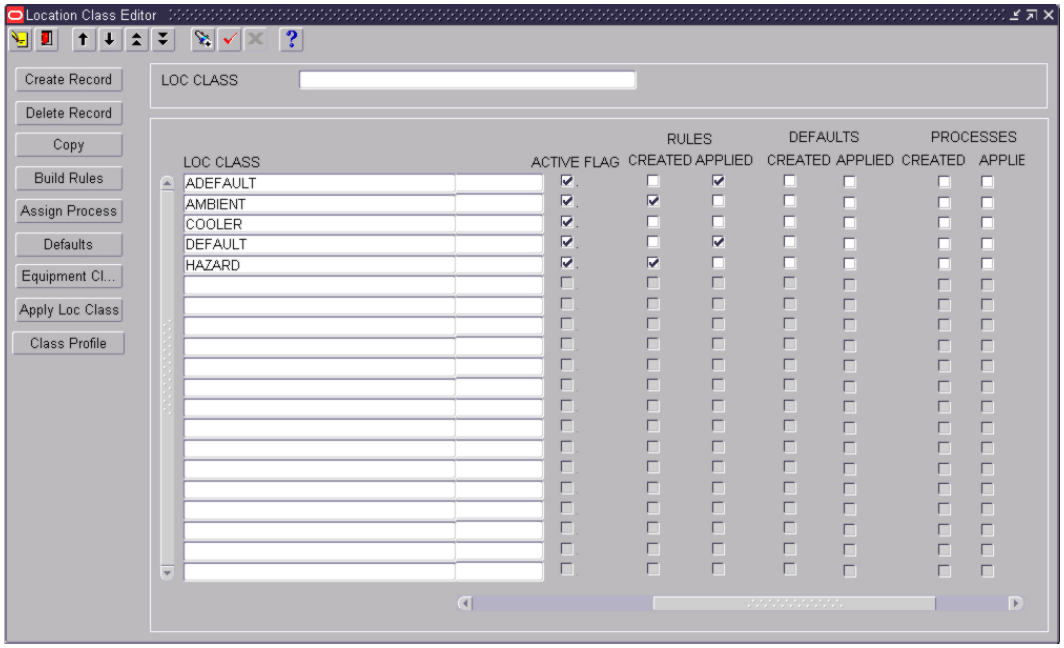
> **Note:** In the Assign Location Class Processes window, you can 1) click **Assign All** to move all processes to the Assigned Processes table or 2) click **Unassign All** to move all processes to the Available Processes table. All processes are moved whether or not the check boxes are selected.

### Exit the Location Class Editor Window

- Click the exit  button to close the window.

## Assign Location Class Equipment Classes

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Location Class Editor. The Location Class Editor window opens.



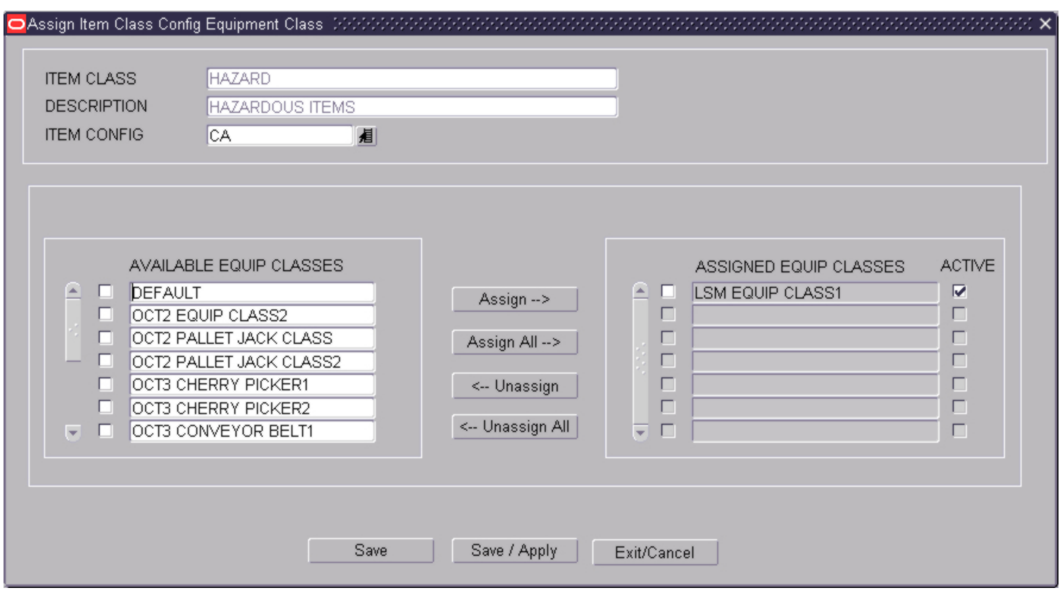

**Location Class Editor Window**

### Display All Location Classes

- Click the execute query  button.

### Assign Equipment Classes

1. On the Location Class Editor window, select the location class that you want to edit.
2. Click **Equipment Cl**. The Assign Equipment Classes window opens.

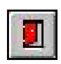



**Assign Equipment Classes Window**

3. To assign equipment classes:
   a. Select the check box next to the desired equipment classes on the Unassigned Equip Class table.
   b. Click **Assign**. The selected equipment classes are moved to the Assigned Equip Class table.
4. To remove assigned equipment classes:
   a. Select the check box next to the desired equipment classes on the Assigned Equip Class table.
   b. Click **Unassign**. The selected equipment classes are moved to the Unassigned Equip Class table.
5. To make the assigned equipment classes available to users, select the Active check box next to the appropriate equipment classes.
6. [Optional] To apply the equipment classes to all locations that are currently assigned to the location class, click **Save/Apply**.
7. Click **Save** to save any changes and close the Assign Equipment Classes window.

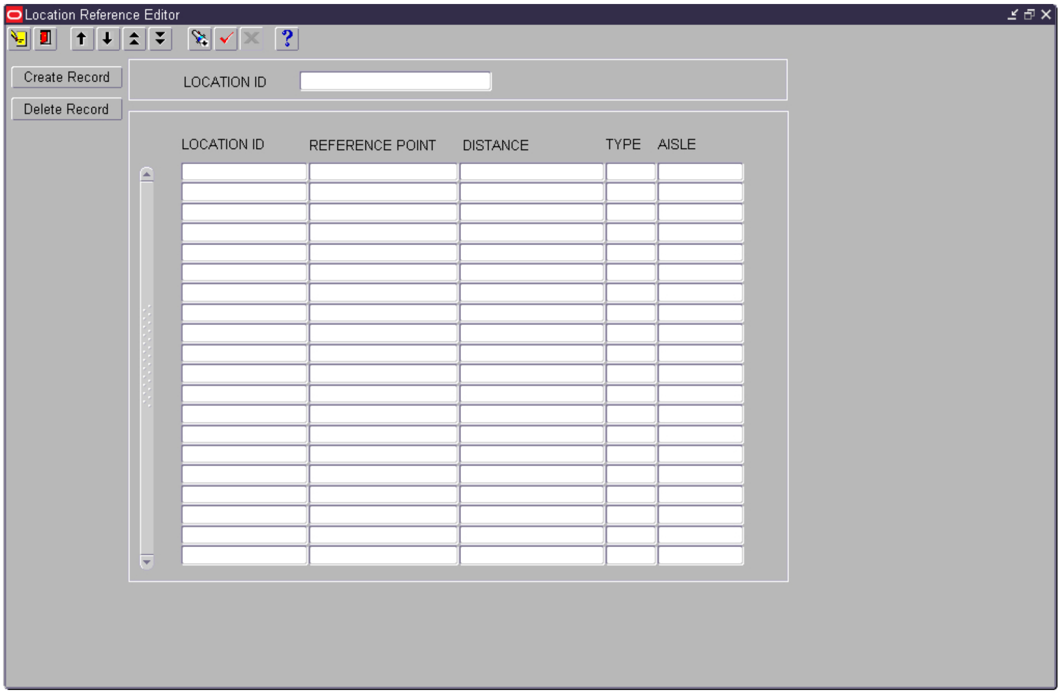
> **Note:** In the Assign Equipment Classes window, you can 1) click **Assign All** to move all equipment classes to the Assigned Equip Class table or 2) click **Unassign All** to move all equipment classes to the Unassigned Equip Class table. All equipment classes are moved whether or not the check boxes are selected.

### Exit the Location Class Editor Window

- Click the exit  button to close the window.

## Maintain Location References

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Location Reference Editor. The Location Reference Editor window opens.




**Location Reference Editor Window**

### Display all Location Reference Points

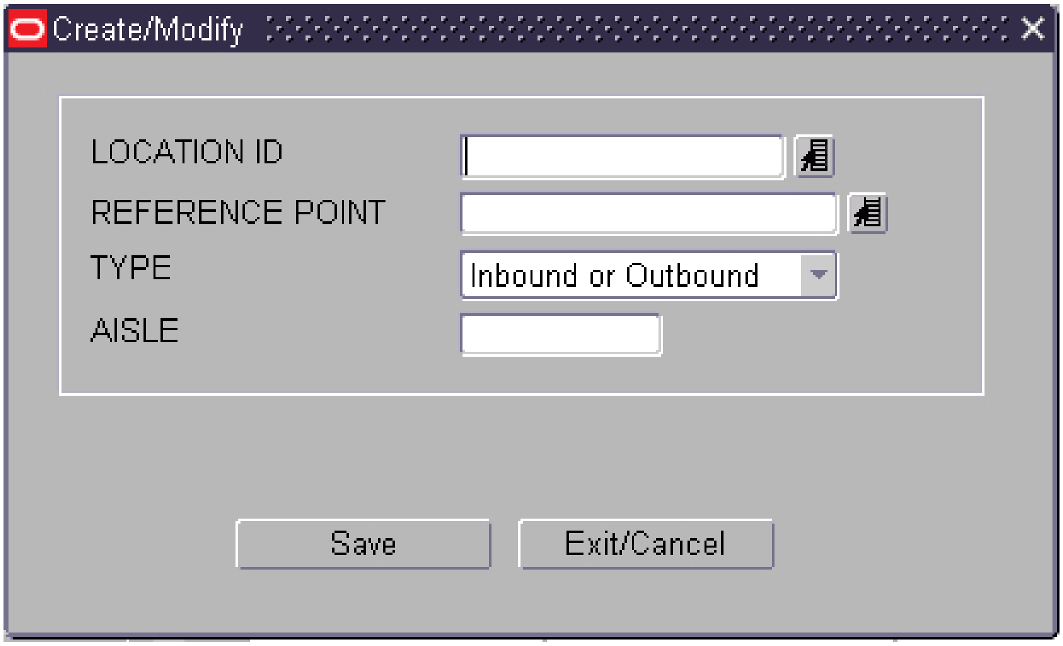
- Click the execute query  button.

### Display a Location Reference Point

1. If any location references are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Location ID query field, enter the ID of the location, or click the LOV  button and select the location ID.
4. Click the execute query  button. The location references that match the search criterion opens.

### Edit a Location Reference

1. On the Location Reference Editor window, double-click the reference point that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

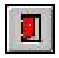
### Add a Location Reference Point

1. On the Reference Editor window, click **Create Record**. The Create/Modify window opens.
2. Enter a Location ID, or click the LOV button and select the location ID.
3. Enter a Reference Point, or click the LOV button and select the location ID.
4. Select a Type:
   - Inbound or Outbound
   - Outbound Only
   - Inbound Only
5. Enter an aisle for the reference.
6. Click **Save** to save any changes and close the Create/Modify window.

### Delete a Location Reference

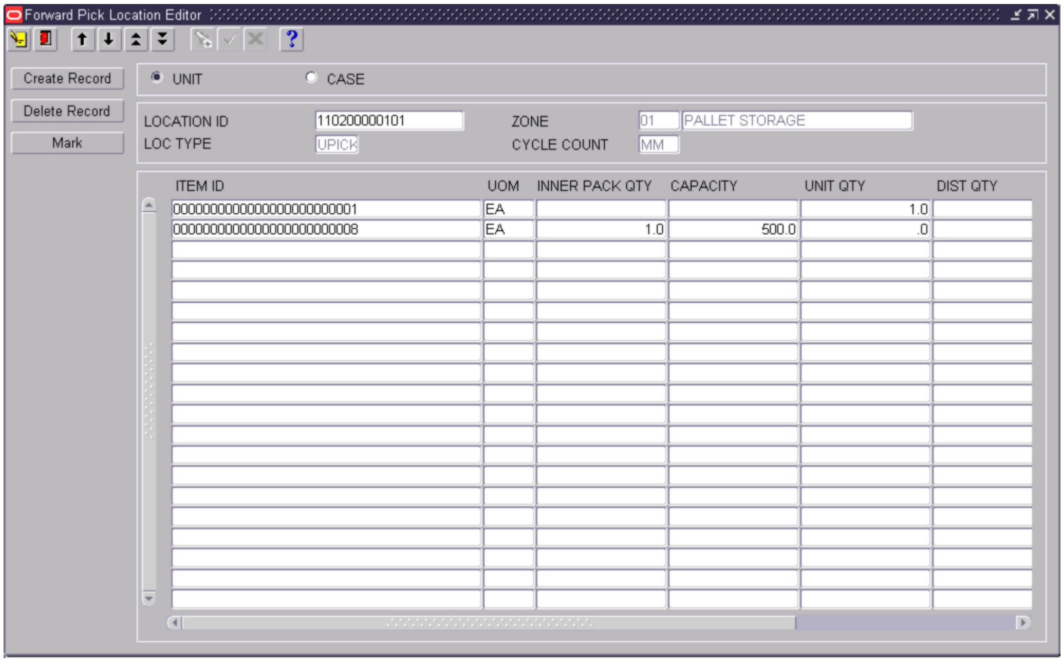
1. On the Location Reference Editor window, select the reference that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Location Reference Editor Window

- Click the exit  button to close the window.

## Maintain Forward Pick Locations

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Forward Picking Location Editor. The Forward Pick Location Editor window opens.




**Forward Pick Location Editor Window**

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**Note:** You can also access this window from the Location Editor window and the Task Maintenance window. On the Location Editor window, the Location Type must pertain to unit picks or forward case picks. On the Task Maintenance window, the Activity must pertain to creating forward pick locations.

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### Display a Forward Pick Location

1. If the details of a forward pick location are currently displayed, click the clear  button.
2. Select either the Unit or the Case option depending on whether you are searching for a forward unit pick or forward case pick location.
3. Click the enter query  button.
4. In the Location ID query field, enter the ID of the forward pick location, or click the LOV  button and select the location.
5. Click the execute query  button. The items associated with the selected location appear.

### Edit an Item in a Forward Pick Location

1. On the Forward Pick Location Editor window, double-click the item that you want to edit. The Create/Modify window opens.
2. Edit the enabled fields.
3. Click **Save** to save any changes and close the Create/Modify window.

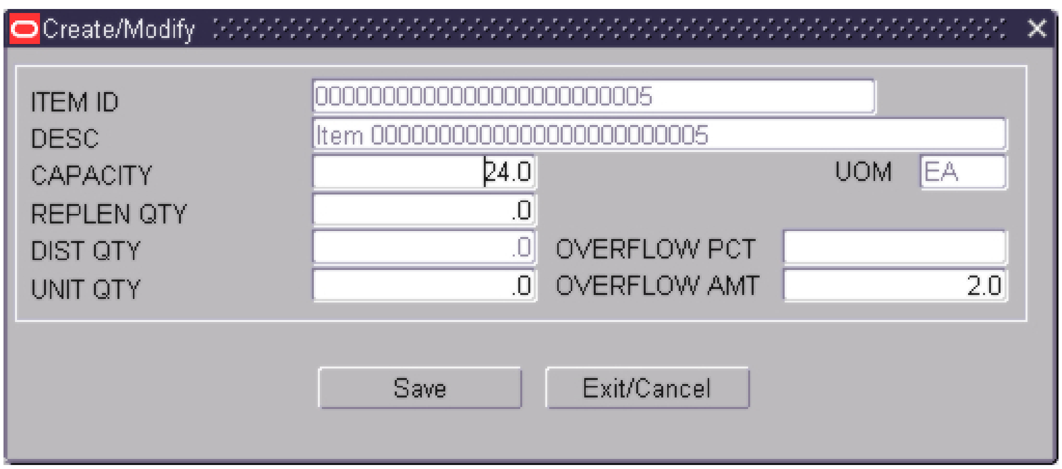
### Mark a Forward Pick Location for Cycle Count

> **Note**: The option to mark a location for cycle count is not available to all users. If the privilege level of the user is less than the value of the system control parameter "mm_sec_level_gu", the following error message is displayed: "Insufficient privileges to perform the operation".

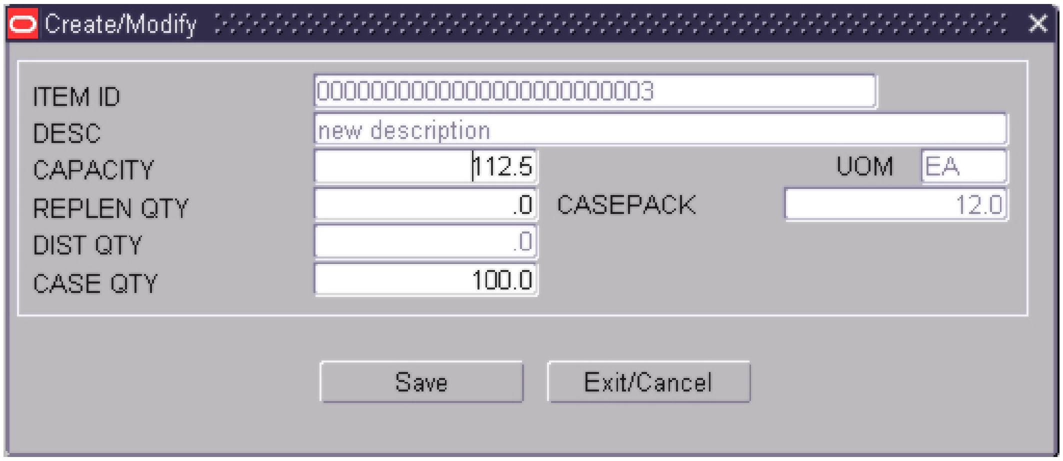
1. On the Forward Pick Location Editor window, click **Mark**.
2. When prompted to confirm the operation, click **Yes**. The status of the Cycle Count changes to MM. This indicates that the location was manually marked for cycle counts.

### Add an Item to a Forward Pick Location

1. Display the location you want to add the item to.
2. On the Forward Pick Location Editor window, click **Create Record**. The Create/Modify window opens.




**Create/Modify Window (Unit)**




**Create/Modify Window (Case)**

3. In the Item ID field, enter the ID of the item, or click the LOV  button and select the item.
4. In the Capacity field:
   - [Unit option] Enter the capacity of the location measured in max units.
   - [Case option] Enter the capacity of the location measured in max number of cases.
5. In the Replen Qty field,
   - [Unit option] Enter the max units at which replenishment is triggered.
   - [Case option] Enter the max cases at which replenishment is triggered.

   > **Note:** Reorder point replenishment must be enabled.

6. In the Qty field:
   - [Unit option] Enter the number of standard units currently stocked at the location.
   - [Case option] In the Case Qty field, enter the number of cases currently stocked at the location.
7. [Case option] In the Casepack field, enter the number of standard units packed in a case.
8. In the Release Qty field, enter the quantity at which replenishment tasks begin.

   > **Note:** This field is used for Time Release replenishment methods.

9. If the location can be filled beyond capacity:
   - In the Overflow Pct field, enter the percentage over capacity allowed.
   - In the Overflow Amt field, enter the quantity over capacity allowed.

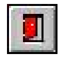
   > **Note:** You can assign either percentage or quantity. The Overflow fields are available if the Overflow attribute has been assigned to the location.

10. Click **Save** to save the changes and close the Create/Modify window.
11. Respond to any prompts that may appear.

### Delete an Item from a Forward Pick Location

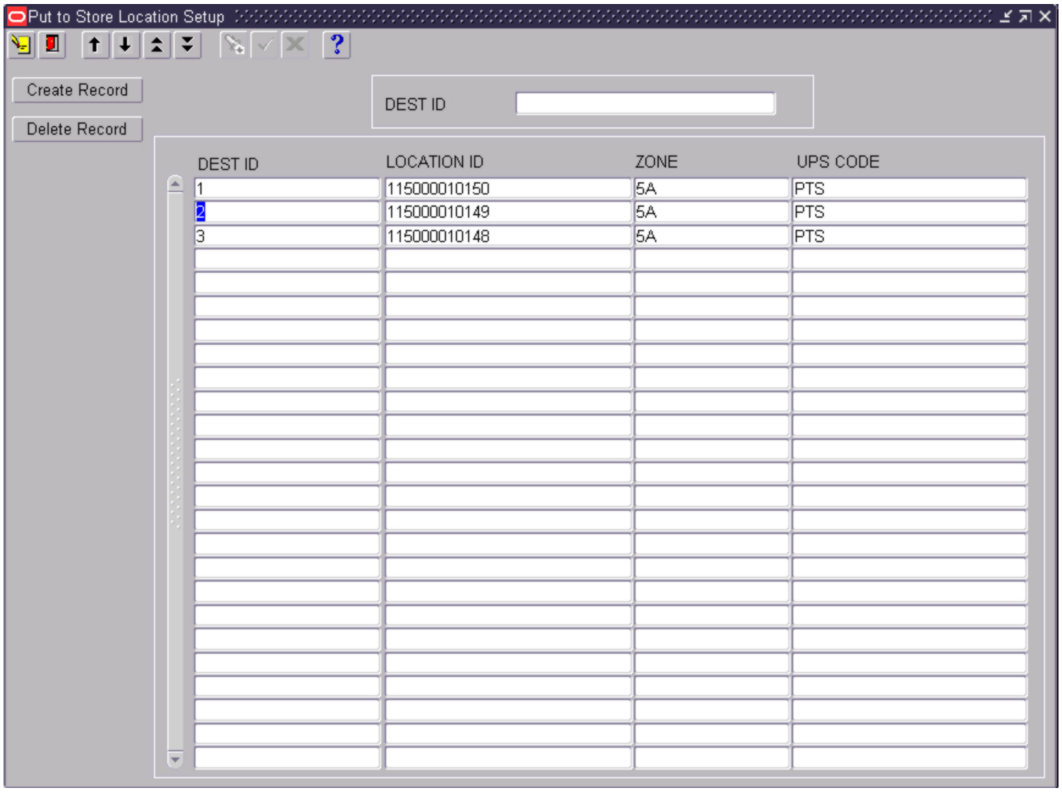
1. On the Forward Pick Location Editor window, select the item that you want to delete from the forward pick location.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Forward Pick Location Editor Window

- Click the exit  button to close the window.

## Maintain PTS Locations

**Navigate:** From the main menu, select Support Functions > DC Setup > Put to Store Setup. The Put to Store Location Setup window opens.




**Put to Store Location Setup Window**

### Display all PTS Locations

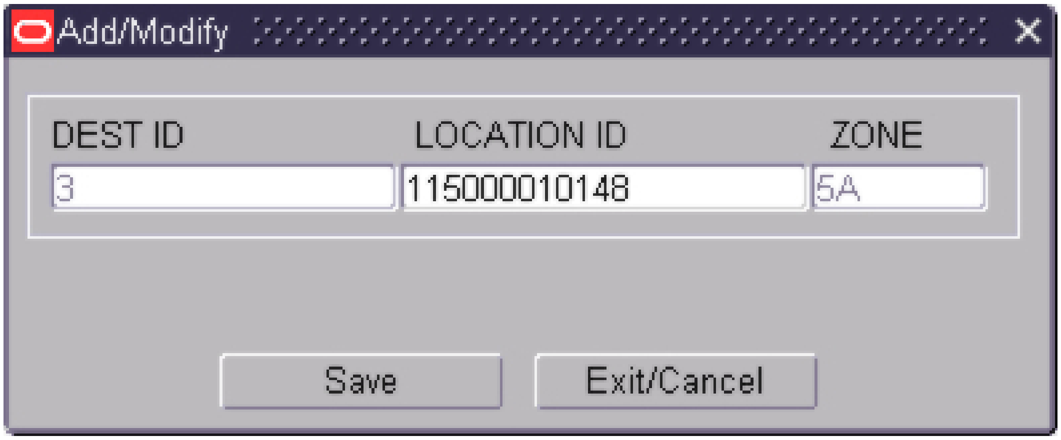
- Click the execute query button.

### Display PTS Locations for a Destination

1. If any destinations are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Dest ID query field, enter the destination ID.
4. Click the execute query button. The locations associated with the destination appear.

### Edit a PTS Location

1. On the Put to Store Location Setup window, double-click the location that you want to edit. The Add/Modify window opens.




**Add/Modify Window**

2. Edit the location ID as necessary.
3. Click **Save** to save any changes and close the Add/Modify window.

### Add a PTS Location

1. On the Put to Store Location Setup window, click **Create Record**. The Add/Modify window opens.
2. In the Dest ID field, enter the ID of the destination (store).
3. In the Location field, enter the ID of the location.
4. Click **Save** to save the changes and close the Add/Modify window.

### Delete a PTS Location

1. On the Put to Store Location Setup window, select the location that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

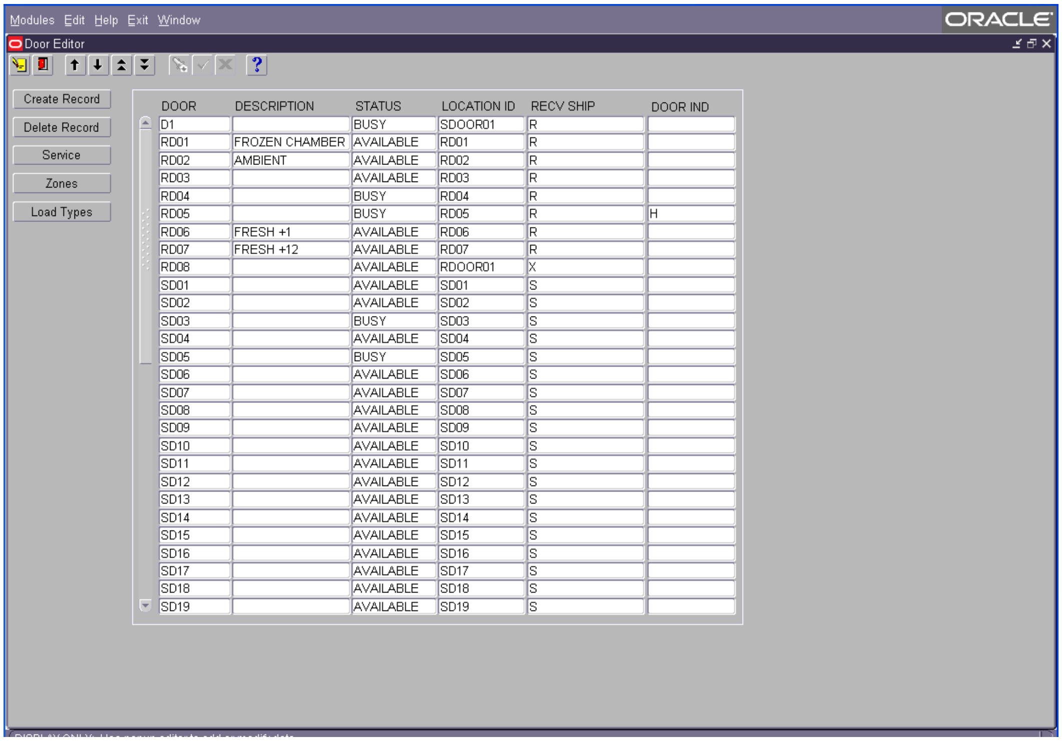
### Exit the Put to Store Location Setup Window

- Click the exit  button to close the window.

## Maintain Doors

Each receiving door may be associated with one or more “load types”. Load types are defined at the item level and can also be at the appointment level. In order for the system to recommend best fit doors for users, load types can be defined for doors.

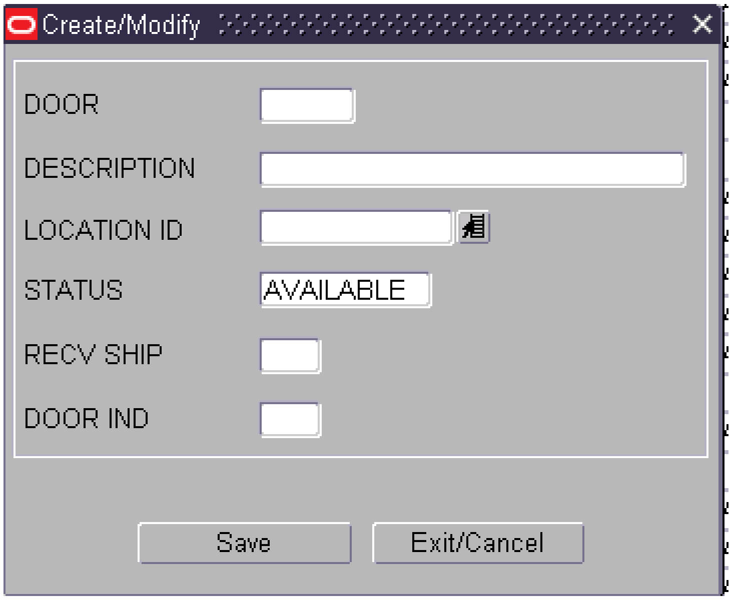
**Navigate:** From the main menu, select Support Functions > DC Setup > Door Editor. The current doors appear in the Door Editor window.




**Door Editor Window**

### Create/Edit a Door

1. On the Door Editor window, double-click the door that you want to create/edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Change the Status of a Door

1. On the Door Editor window, select the door that you want to edit.
2. Click **Service**. If the status was Available, it becomes Out of Service. If it was Out of Service, it becomes Available.

### Add a Door

1. On the Door Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Door field, enter the ID for the door.
3. In the Location ID field, enter the ID of the door's location, or click the LOV  button and select the location.
4. In the Recv Ship field, enter the code for the door's function. The function may be R (Receiving), S (Shipping), or X (Both).
5. In the Door Ind field, enter the code for the type of merchandise handled at the door. The type may be H (Hanging), F (Flat), S (Shoe), or A (All).
6. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Door

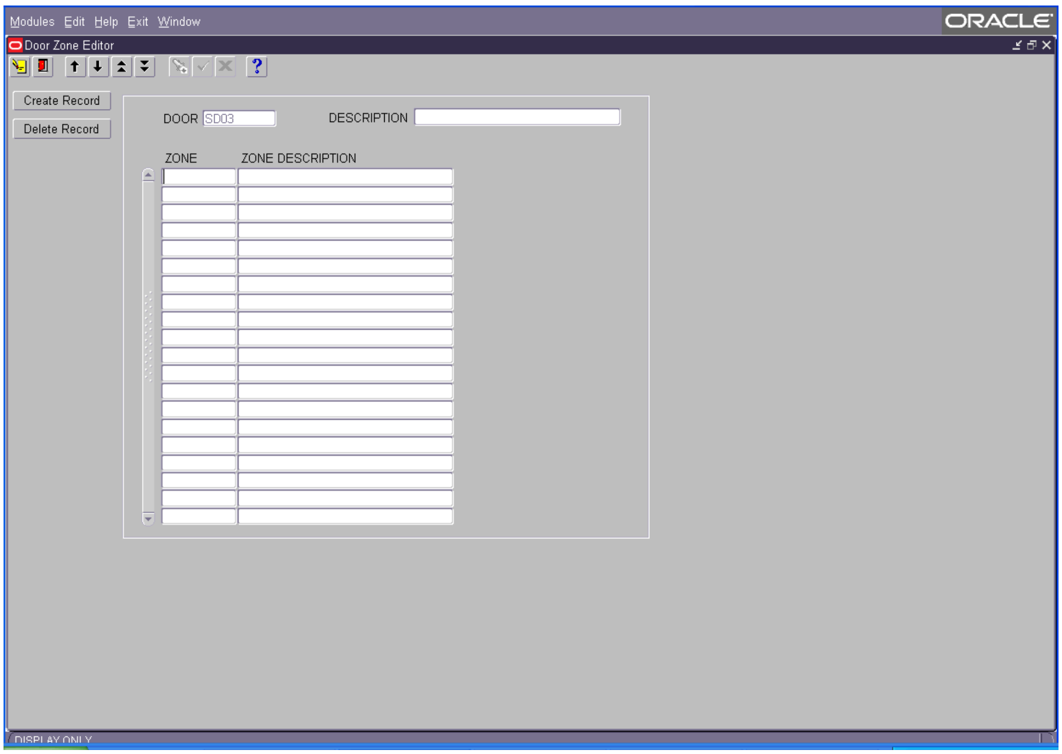
1. On the Door Editor window, select the door that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Service a Door

1. On the Door Editor window, select the door that you want to service.
2. Click **Service**. The Status of the door changes.

### Zone a Door

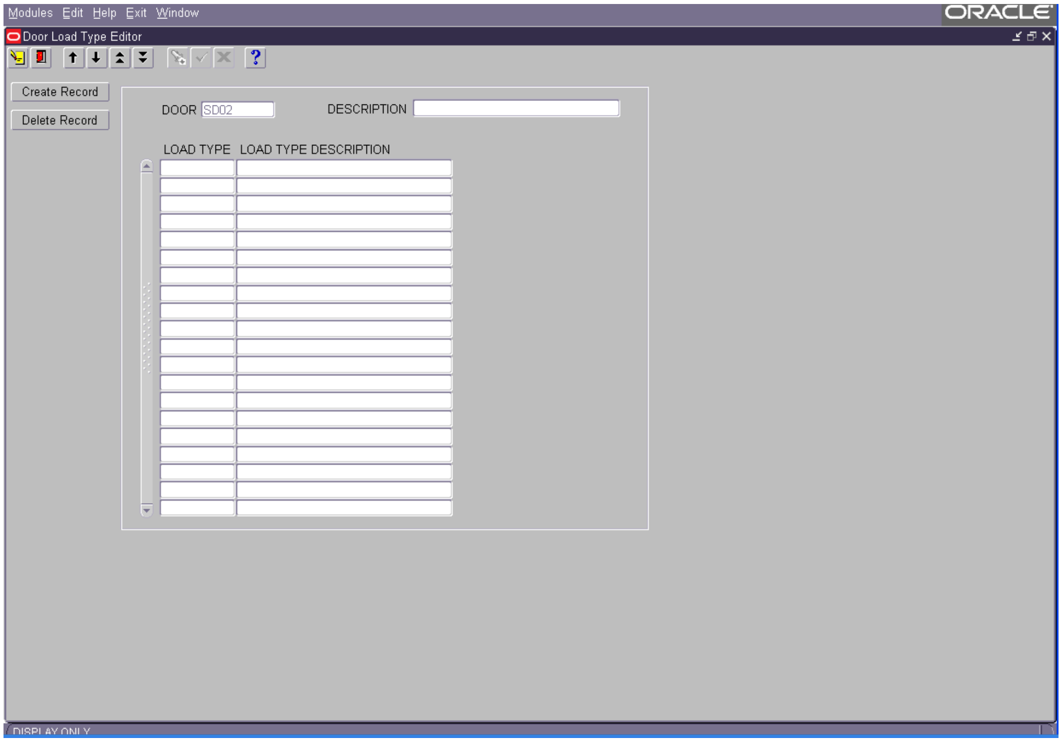
1. On the Door Editor window, select a door.
2. Click **Zones**. The Zone Door Editor window opens.




**Zone Door Editor window**

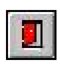
## Set Load Types for a Door

1. On the Door Editor window, select a door.
2. Click **Load Types**. The Door Load Type Editor window opens.



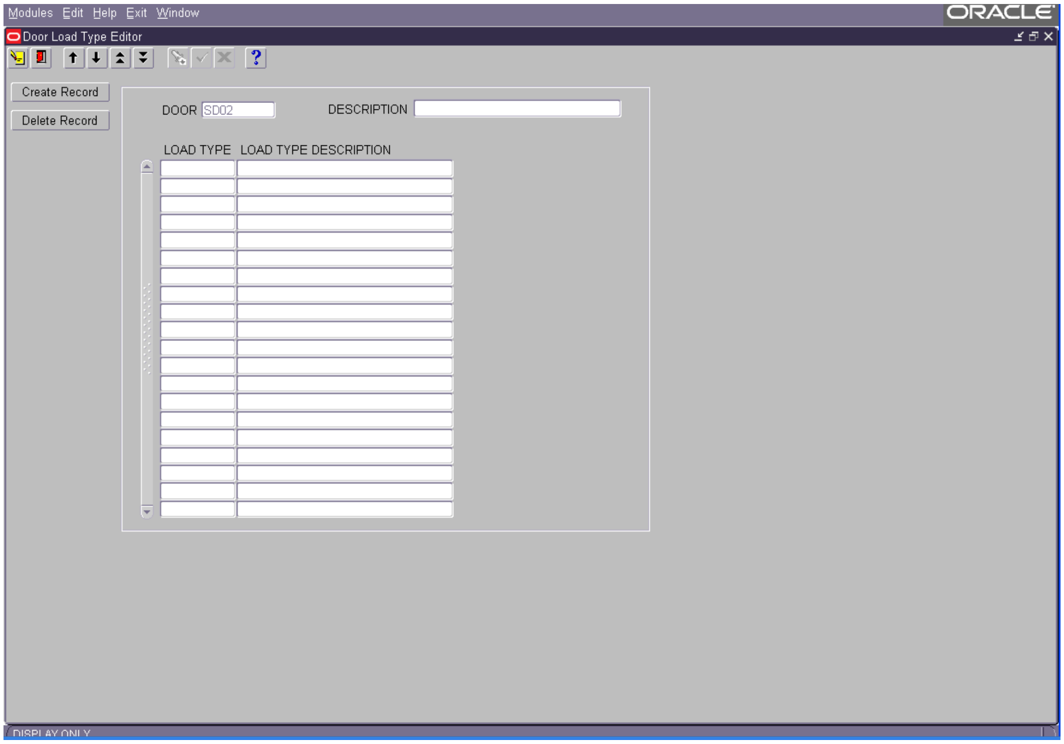

**Door Load Type Editor window**

## Exit the Door Editor Window

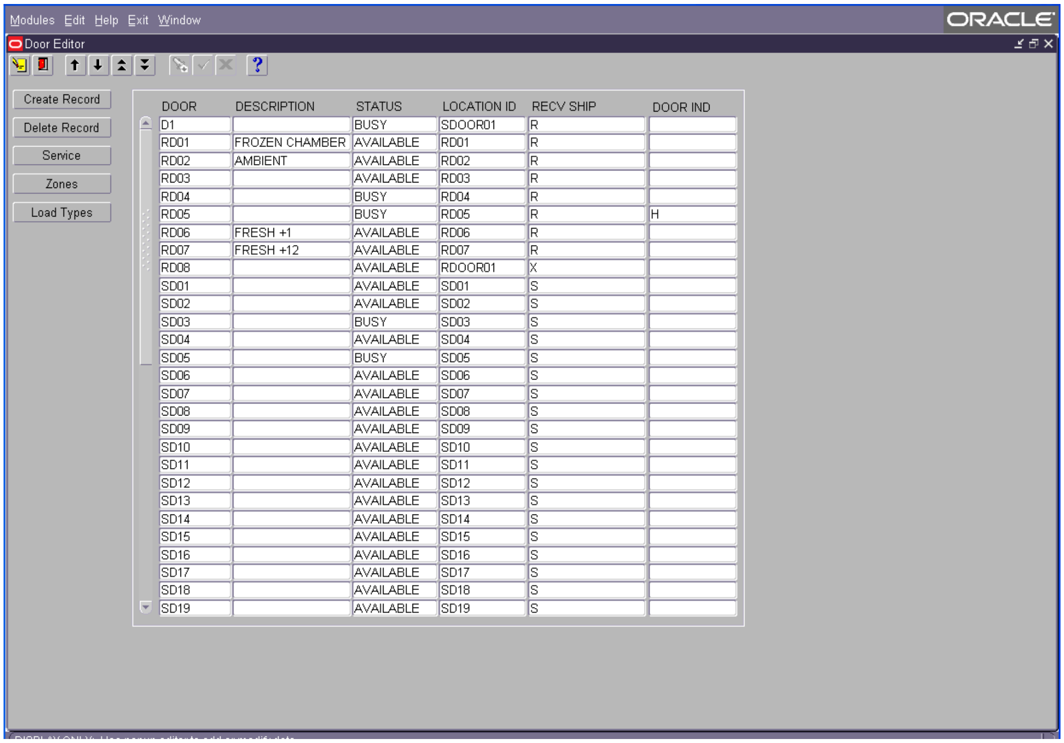
- Click the exit  button to close the window.

## Maintain Door Load Type Editor

**Navigate:** From the main menu, select Support Functions > DC Setup > Door Editor. The current doors appear in the Door Editor window. Select a door, click **Load Types**. The Door Load Type Editor window opens.



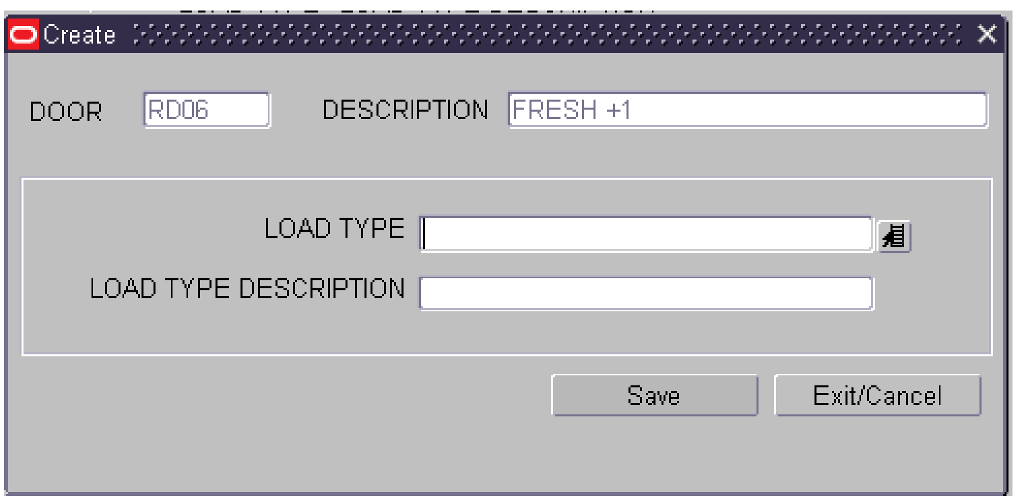

**Door Load Type Editor window**




**Door Editor Window**

## Create/Edit a Record

1. On the Door Load Type Editor window, double-click the door that you want to create/edit. The Create/Modify window opens.




**Create/Modify Load Type Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

## Delete a Record

1. On the Door Load Type Editor window, select the door that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Door Load Type Editor

- Click the exit button to close the window.

## Generate the Class Profile Report

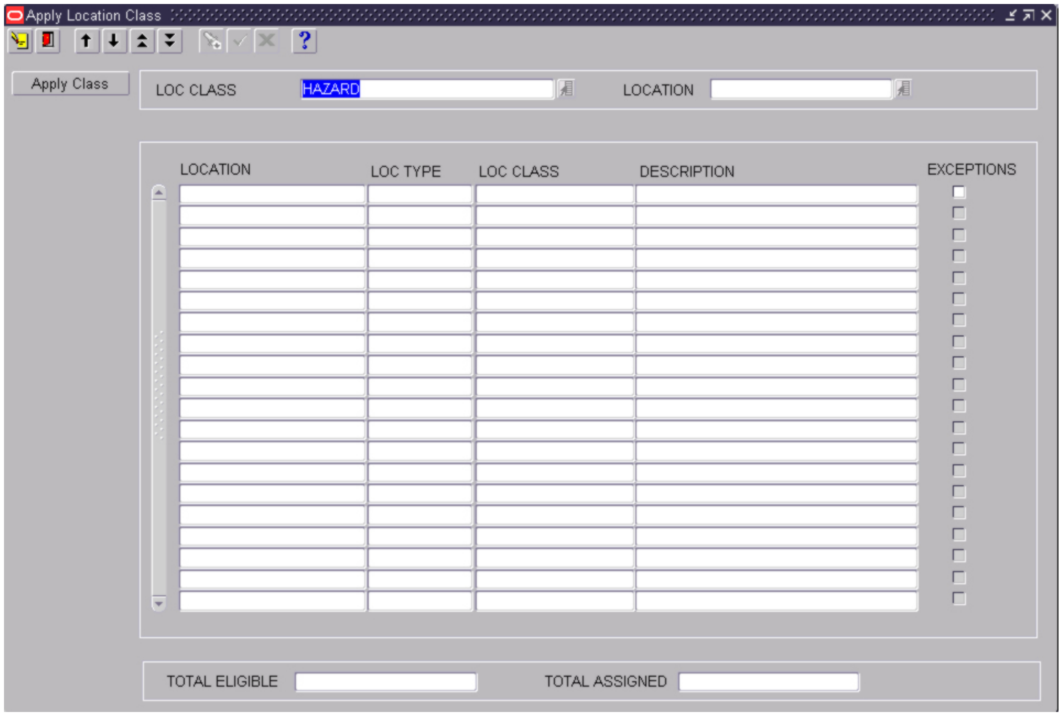
**Navigate:** From the main menu, select Support Functions > Reports > Class Profile Report Request. The Item/Location Class Profile Report Request window opens.

> **Note:** You can also access this window from the Location Class Editor, Location Editor, and Item Class Editor windows. The field names on this window vary depending on how you access the window.

1. Select either the Item Profile or Location Profile option depending on the type of profile that you want.
2. In the Level block select either the Class Level or Individual Level option to indicate the level of detail you want.
3. If you selected the Class Level option, enter the following in the Class block:
   a. In the Item Class (or Location Class) field, enter the name of the class, or click the LOV button and select the Class.
   b. Indicate whether you want to include items (or locations) with exceptions, all items (or locations), or no items (or locations) on the report.
4. If you selected Individual ID level, enter the ID of the item (or location) in the Item ID (or Location ID) field.
5. Click **Print**. The report is sent to the default destination.

## Apply Location Classes

**Navigate:** From the main menu, select Support Functions > DC Setup > Location Setup > Apply Location Class. The Apply Location Class window opens.




**Apply Location Class Window**

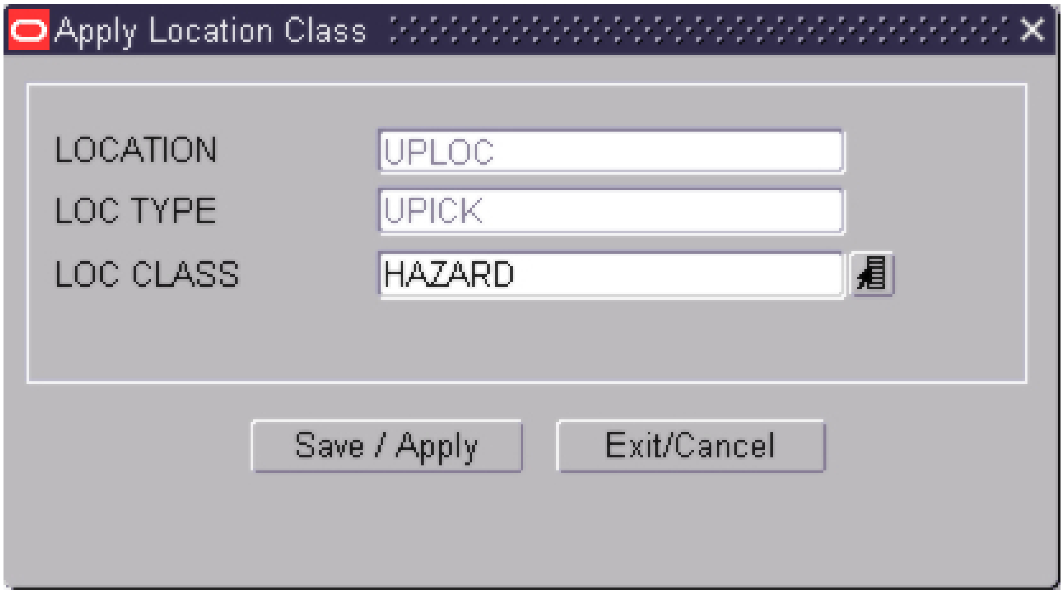
> **Note:** You can also access this window from the Location Class Editor and Location Editor windows.

### Display Locations by Location Class

1. If any locations or location classes are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Loc Class query field, enter the name of the location class, or click the LOV  button and select the location class.
4. Click the execute query  button. The locations that match the build rules of or are assigned to the location class appear.

### Assign Locations to a Location Class

1. On the Apply Location Class window, click **Apply Class**. The Apply Location Class (Assign Locations) window opens.




**Apply Location Class (Assign Locations) Window**

> **Note:** The locations that are currently assigned to the location class appear in the Assigned Locations table. The remaining locations that match the build rules appear in the Available Locations table.

2. To assign locations:
   a. Select the check box next to the desired locations on the Available Locations table.
   b. Click **Assign**. The selected locations are moved to the Assigned Locations table.
3. To remove assigned locations:
   a. Select the check box next to the desired locations on the Assigned Locations table.
   b. Click **Unassign**. The selected locations are moved to the Available Locations table.
4. Click **Save/Apply** to save the changes and close the Apply Location Class (Assign Locations) window.

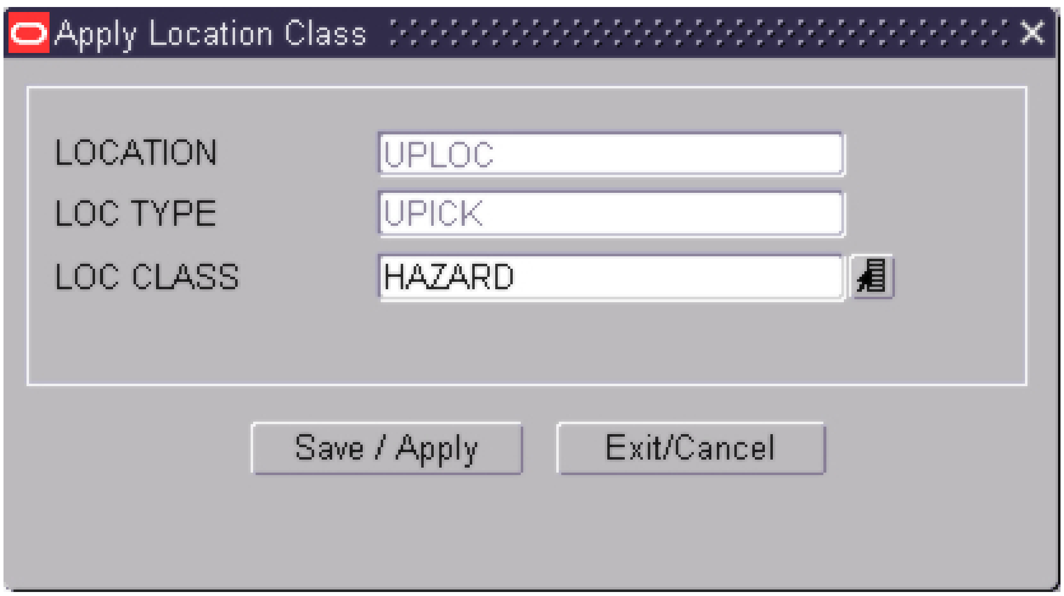
> **Note:** In the Apply Location Class (Assign Locations) window, you can:
>
> 1) Click **Assign All** to move all locations to the Assigned Locations table.
>
> 2) Click **Unassign All** to move all locations to the Available Locations table. All locations are moved whether or not the check boxes are selected.

### Display Location Classes by Location

1. If any locations or location classes are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Location query field, enter the ID of the location, or click the LOV button and select the location.
4. Click the execute query button. The location classes that match the selected location appear. The Current check box is selected next to the location class, if any, that is currently assigned to the location.

### Assign a Location Class to a Location

1. On the Apply Location Class window, click **Apply Class**. The Apply Location Class (Assign Location Class) window opens.




**Apply Location Class (Assign Location Class) Window**

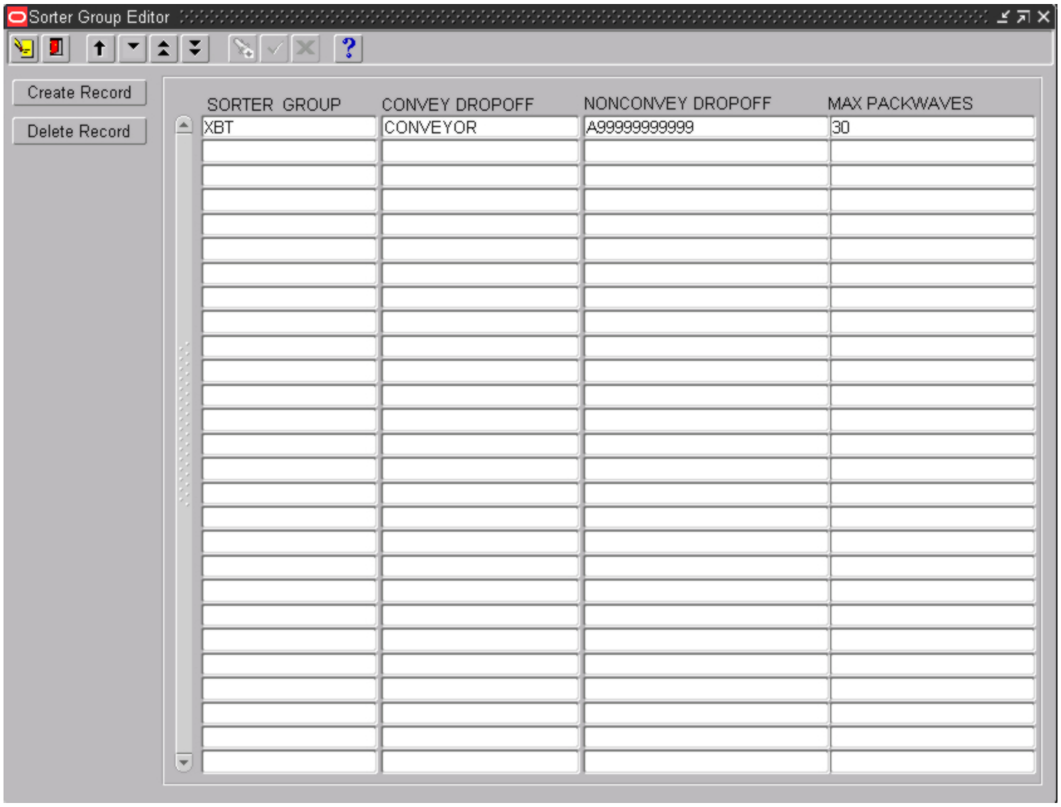
2. In the Loc Class field, enter the name of the location class, or click the LOV button and select the location class.
3. Click **Save/Apply** to save the changes and close the Apply Location Class (Assign Location Class) window.

### Exit the Apply Location Class Window

- Click the exit button to close the window.

## Maintain Sorter Groups

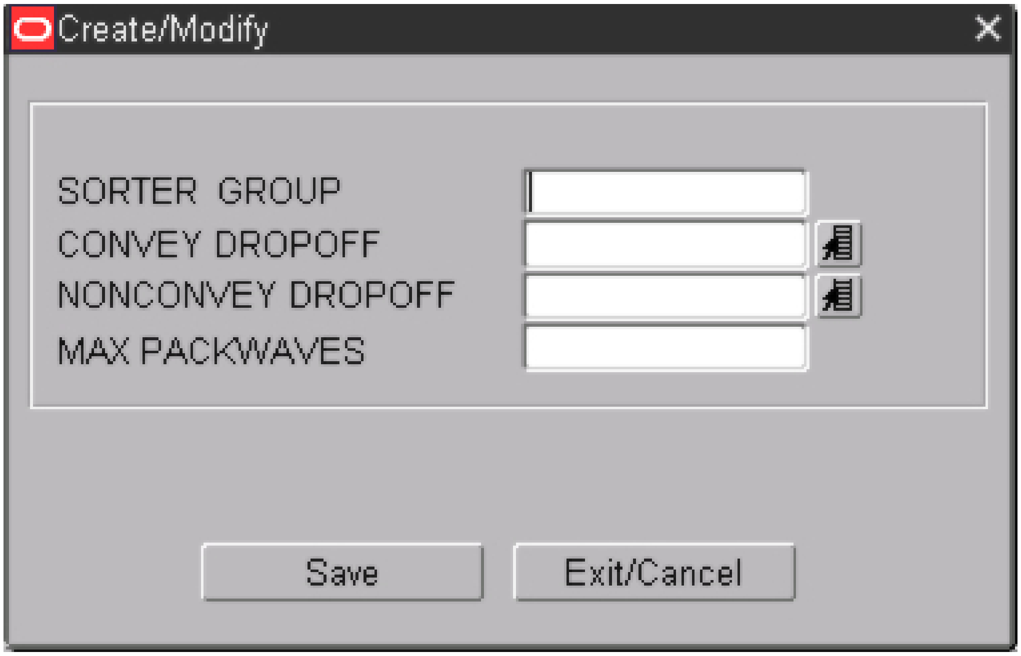
**Navigate:** From the main menu, select Support Functions > DC Setup > Sorter Group Editor. The current sorter groups appear in the Sorter Group Editor window.




**Sorter Group Editor Window**

### Edit a Sorter Group

1. On the Sorter Group Editor window, double-click the sorter group that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the drop-off locations and maximum pack waves as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

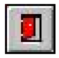
### Add a Sorter Group

1. On the Sorter Group Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Sorter Group field, enter a name for the group.
3. In the Convey Dropoff field, enter the ID of the location where conveyable merchandise should be dropped off, or click the LOV button and select the location.
4. In the Nonconvey Dropoff field, enter the ID of the location where non-conveyable merchandise should be dropped off, or click the LOV and select the location.
5. In the Max Packwaves field, enter the maximum number of pack waves to be distributed for each pick wave.
6. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Sorter Group

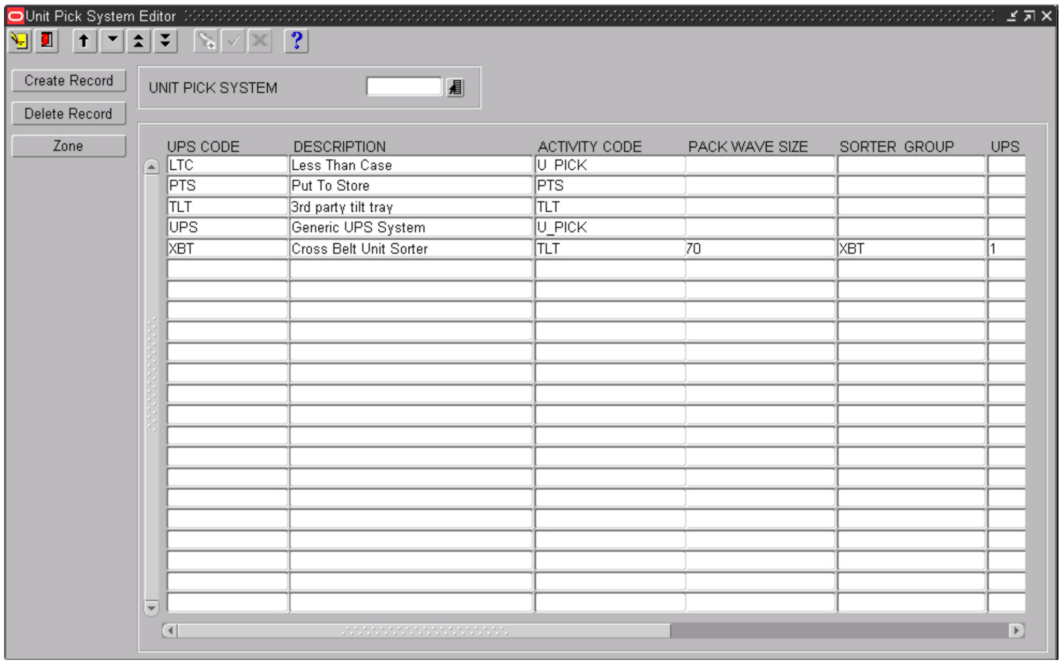
1. On the Sorter Group Editor window, select the sorter group that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Sorter Group Editor Window

- Click the exit  button to close the window.

## Maintain Unit Pick Systems

**Navigate:** From the main menu, select Support Functions > DC Setup > Unit Pick System Editor. The Unit Pick System Editor window opens.




**Unit Pick System Editor Window**

### Display All Unit Pick Systems

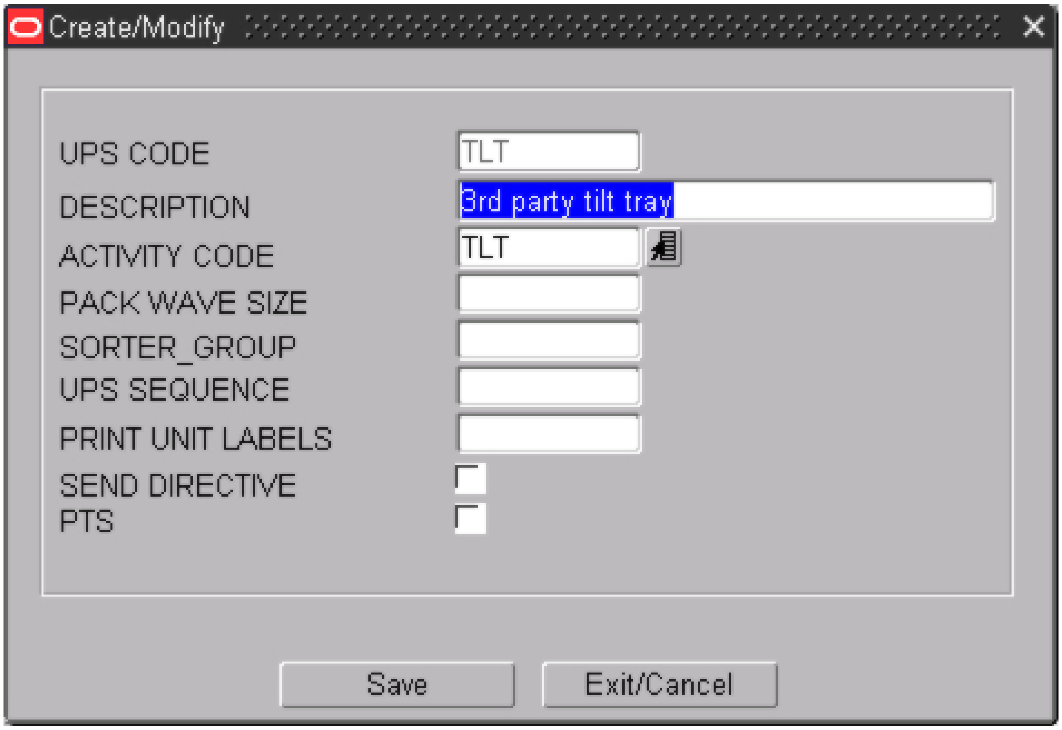
- Click the execute query  button.

### Display a Unit Pick System

1. If any unit pick systems (UPS) are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Unit Pick System query field, enter the UPS code, or click the LOV  button and select the UPS.
4. Click the execute query  button. The selected UPS opens.

### Edit a Unit Pick System

1. On the Unit Pick System Editor window, double-click the UPS that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

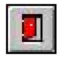
### Add a Unit Pick System

1. On the Unit Pick System Editor window, click **Create Record**. The Create/Modify window opens.
2. In the UPS Code and Description fields, enter a code and description for the UPS.
3. In the Activity Code field, enter the code of the activity performed by the UPS, or click the LOV  button and select the activity.
4. In the Pack Wave Size field, enter the number of groups that are permitted in a pack wave.
5. In the Sorter Group field, enter the sorter group if the UPS is a sorter system.
6. In the UPS Sequence field, enter the order in which this UPS should be accessed within its defined sorter group.
7. In the Print Unit Labels field, enter Y (Yes) or N (No) to indicate whether unit labels should be printed for each unit pick group.
8. In the PTS field, select the check box if the UPS is a put to store system.
9. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Unit Pick System

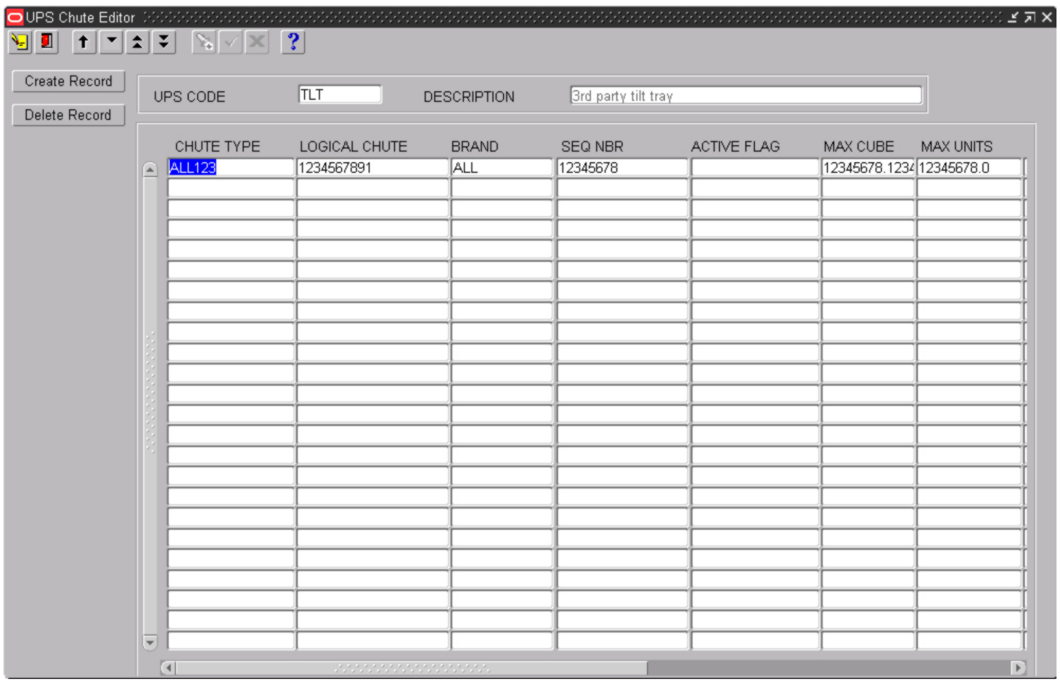
1. On the Unit Pick System Editor window, select the UPS that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Unit Pick System Editor Window

- Click the exit  button to close the window.

## Maintain UPS Chutes

**Navigate:** From the main menu, select Support Functions > DC Setup > UPS Chute Editor. The UPS Chute Editor window opens.



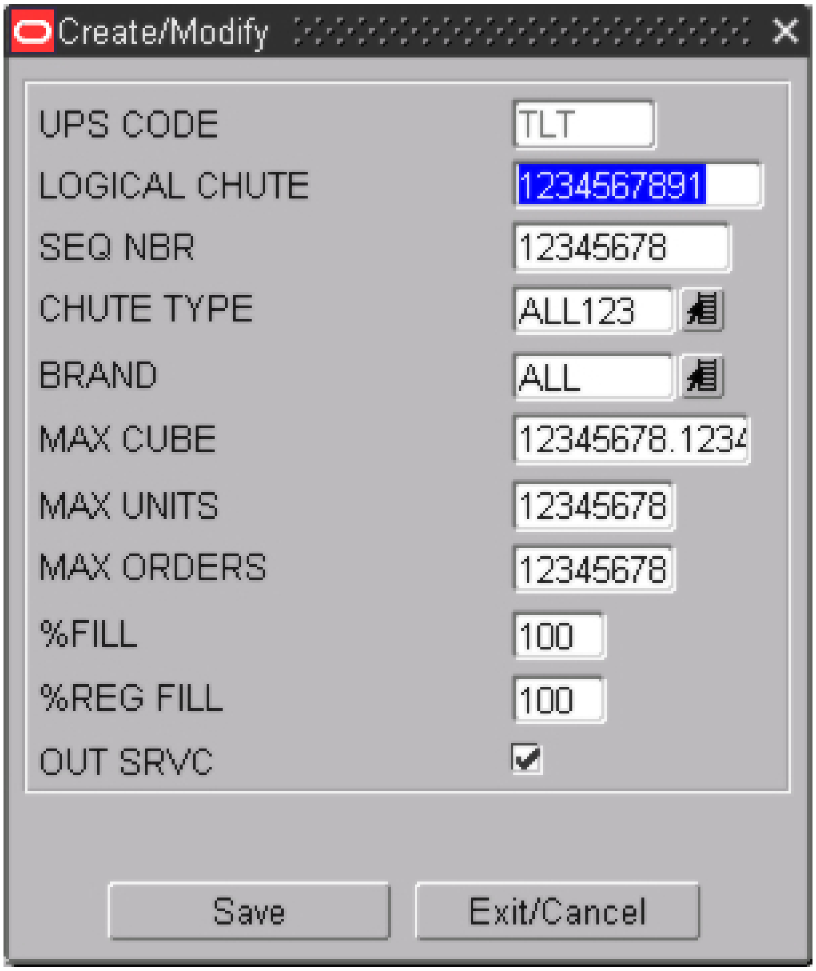

**UPS Chute Editor Window**

### Display Chutes for a Unit Pick System

1. If any chutes are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Unit Pick System query field, enter the code for the UPS, or click the LOV  button and select the UPS.
4. Click the execute query  button. The chutes for the selected UPS appear.

### Edit a UPS Chute

1. On the UPS Chute Editor window, double-click the chute that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Edit the Status of a Chute

1. On the UPS Chute Editor window, double-click the chute that you want to edit. The Create/Modify window opens.
2. To place a chute out of service, select the Out Srvc check box.
   To place a chute in service, clear the Out Srvc check box.
3. Click **Save** to save any changes and close the Create/Modify window.

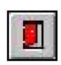
### Add a UPS Chute

1. On the UPS Chute Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Logical Chute field, enter the name of the chute.
3. In the Seq Nbr field, enter the sequence in which the chute is to be filled in relation to other chutes in the sorter.
4. If you want to dedicate the chute to a specific brand, enter the brand name in the Brand field.
5. In the Max Cube, Max Units, and Max Orders fields, enter the maximum cubic, unit, and order capacities of the chute for one pack wave.
6. In the % Fill field, enter the percentage at which the chute is considered full for a pack wave.
7. In the % Reg Fill, enter the percentage of regular orders allowed in the chute. If the chute type is Regular, this percentage must equal the percentage in the % Fill field.
8. If you want to place the chute out of service, select the Out Srvc check box.
9. Click **Save** to save the changes and close the Create/Modify window.

### Delete a UPS Chute

1. On the UPS Chute Editor window, select the chute that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

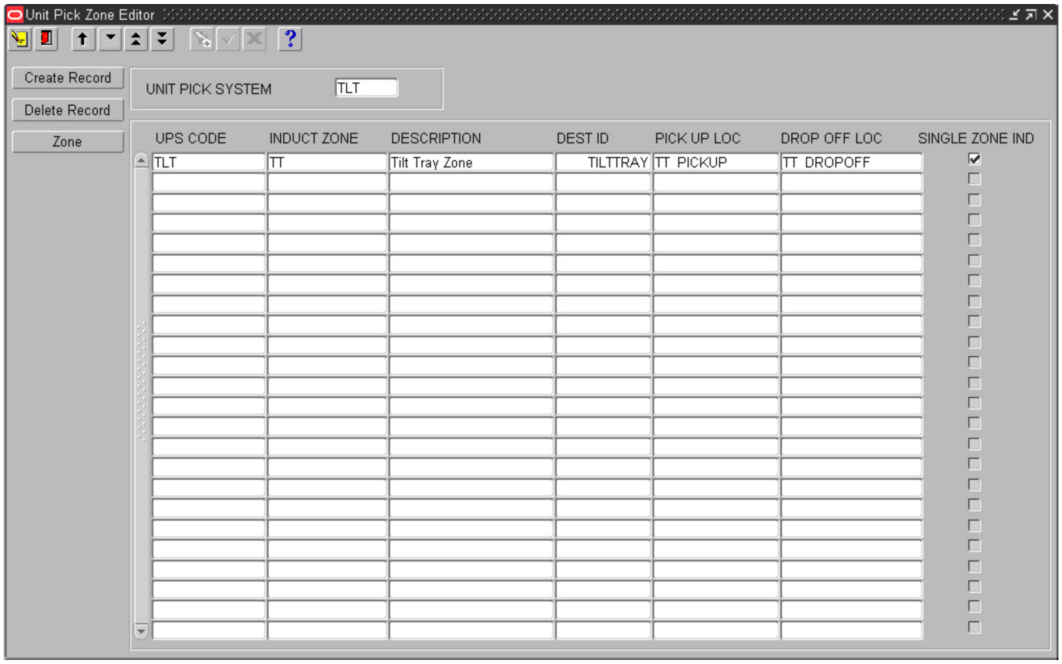
### Exit the UPS Chute Editor Window

- Click the exit  button to close the window.

## Maintain UPS Induct Zones

**Navigate:** From the main menu, select Support Functions > DC Setup > Unit Pick System Editor. The Unit Pick System Editor window opens.

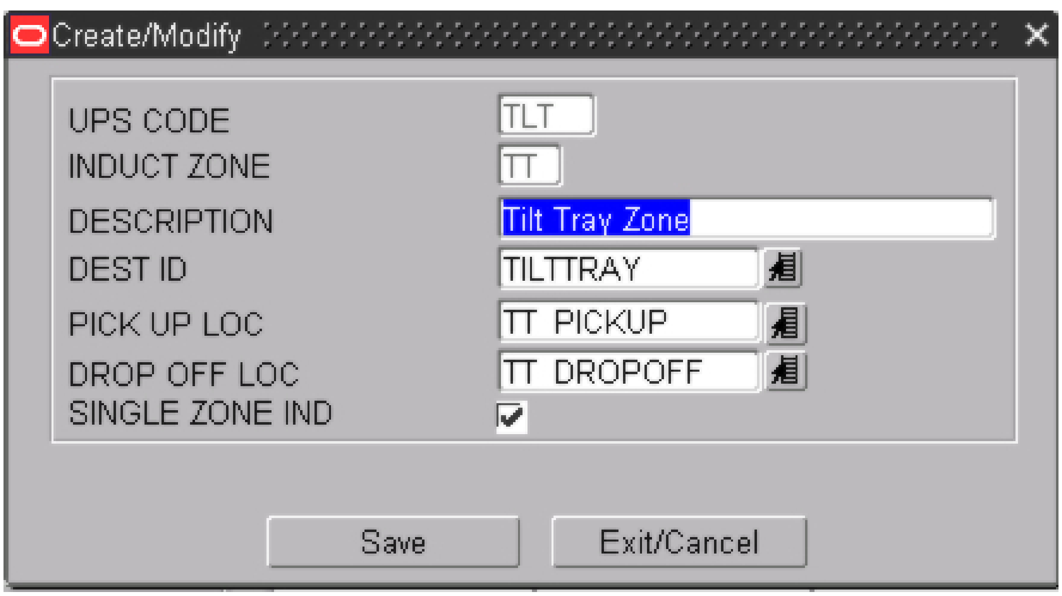
Display one or all unit pick systems. Select a UPS and click **Zone**. The induct zones for the selected UPS appear in the Unit Pick Zone Editor window.




**Unit Pick Zone Editor Window**

### Edit a UPS Induct Zone

1. On the Unit Pick Zone Editor window, double-click the induct zone that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a UPS Induct Zone

1. On the Unit Pick Zone Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Induct Zone and Description fields, enter the ID and description of the induct zone.
3. In the Dest ID field, enter the ID of the internal destination of the induct zone, or click the LOV button and select the destination.
4. In the Pick Up Loc field, enter the ID of the pickup location, or click the LOV button and select the location. The pickup location is the staging location where merchandise leaves the UPS induct zone.
5. In the Drop Off Loc field, enter the ID of the drop-off location, or click the LOV button and select the location. The drop-off location is the staging location where merchandise enters the UPS induct zone.
6. If the UPS has a single induct zone, select the Single Zone Ind check box.
7. Click **Save** to save the changes and close the Create/Modify window.

### Delete a UPS Induct Zone

1. On the Unit Pick Zone Editor window, select the UPS induct zone that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Unit Pick Zone Editor Window

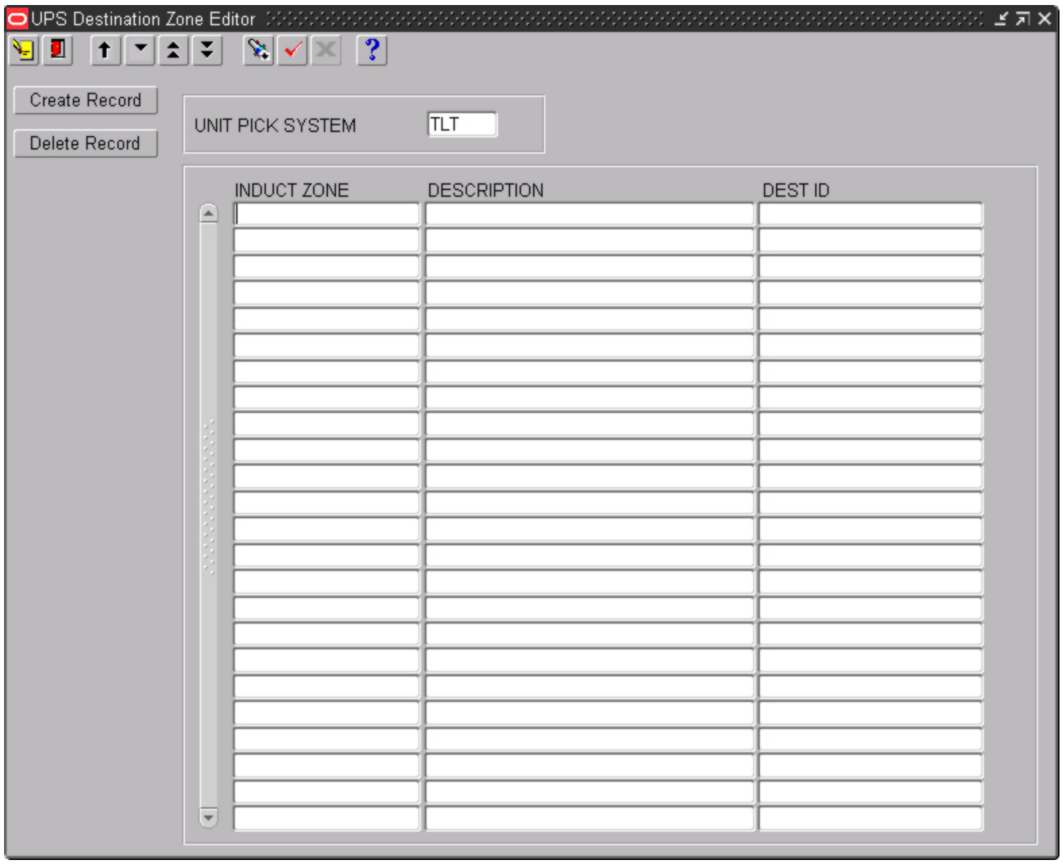
- Click the exit button to close the window.

## Maintain UPS Destinations

**Navigate:** From the main menu, select Support Functions > DC Setup > Unit Pick System Editor. The Unit Pick System Editor window opens.

Display one or all unit pick systems. Select a UPS and click **Zone**. The induct zones for the selected UPS appear in the Unit Pick Zone Editor window.

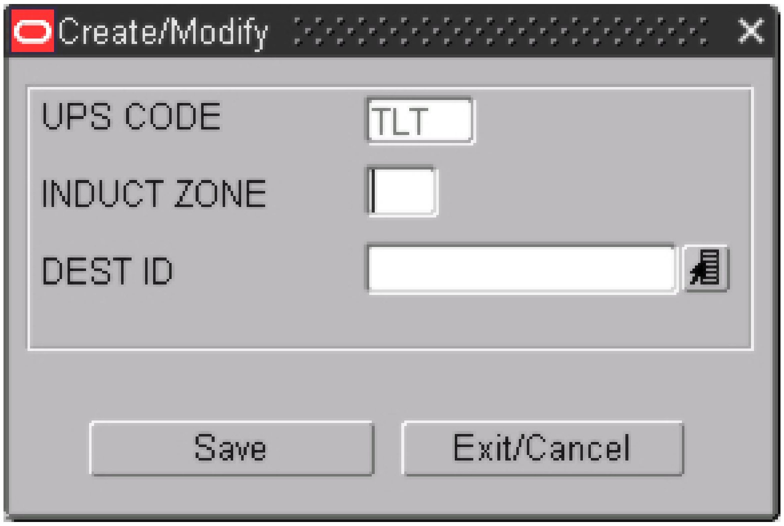
Select an induct zone and click **Zone**. The destinations for the selected induct zone appear in the UPS Destination Zone Editor window.




**UPS Destination Zone Editor Window**

### Edit a Destination

1. On the UPS Destination Zone Editor window, double-click the destination that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the destination ID as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Destination

1. On the UPS Destination Zone Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Induct Zone field, enter the ID of the induct zone.
3. In the Dest ID field, enter the ID of the destination, or click the LOV button and select the destination.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Destination

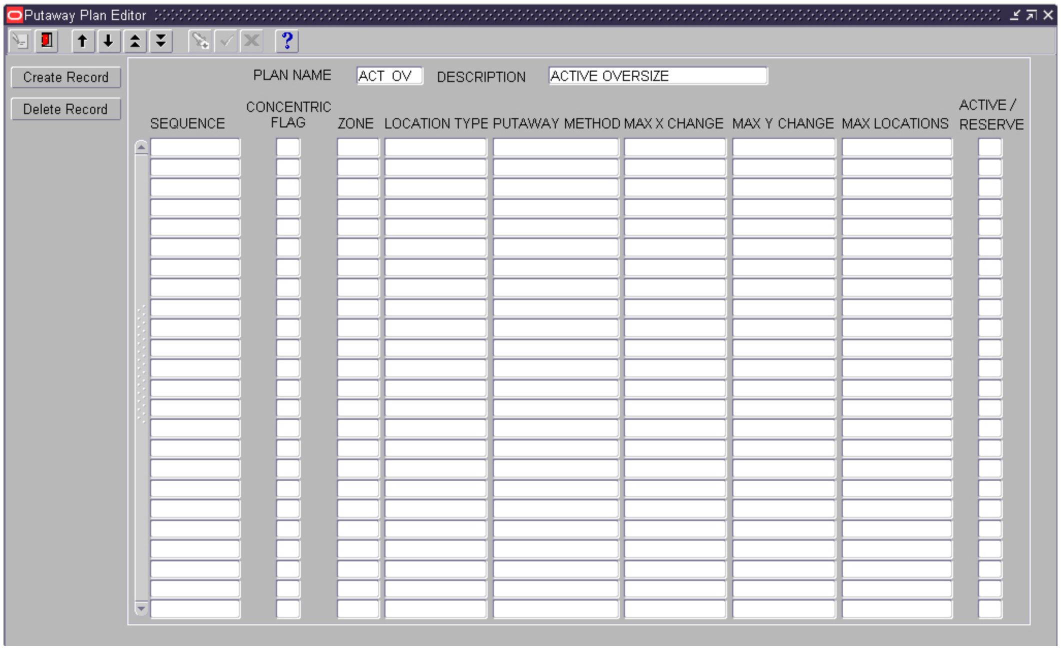
1. On the UPS Destination Zone Editor window, select the destination that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the UPS Destination Zone Editor Window

- Click the exit button to close the window.

## Maintain Putaway Plans

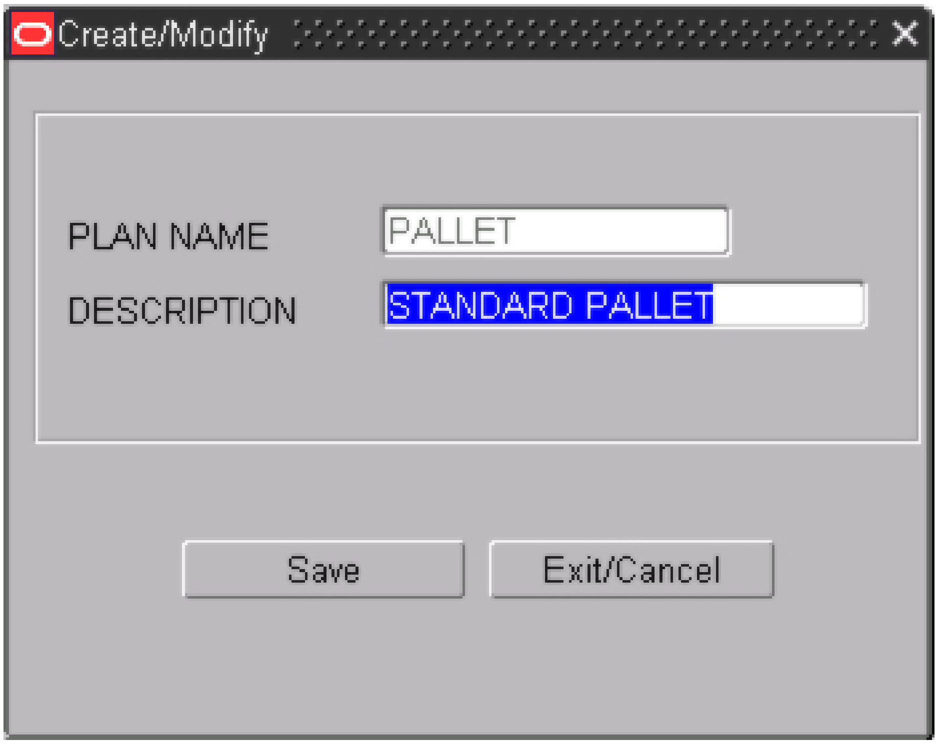
**Navigate:** From the main menu, select Support Functions > DC Setup > Putaway Plan Editor. The current putaway plans appear in the Putaway Plan Editor window.




**Putaway Plan Editor Window**

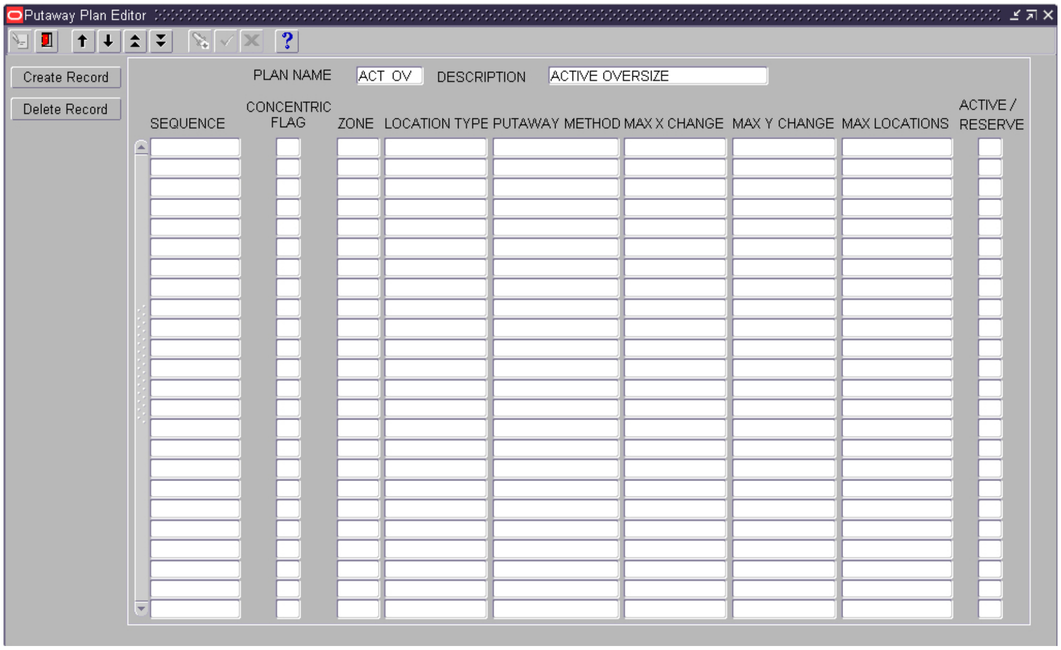
### Edit a Plan or Plan Details

1. On the Putaway Plan Editor window, double-click the plan that you want to edit. The Create/Modify window opens.



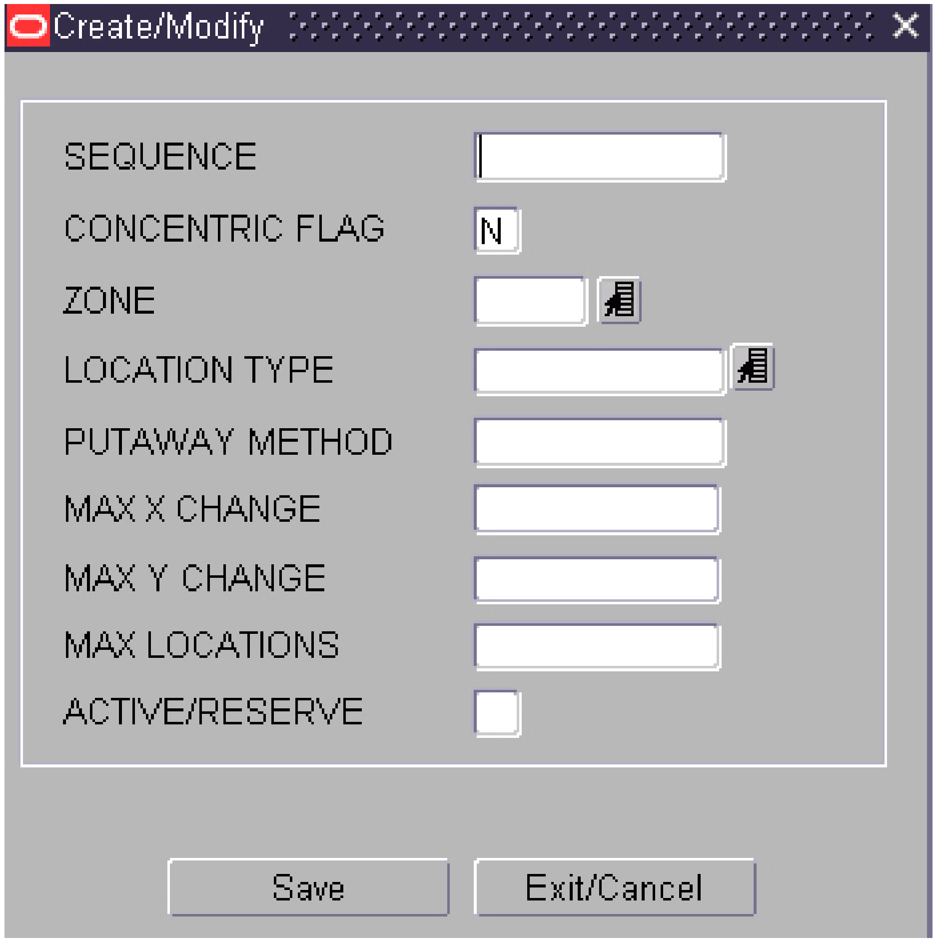

**Create/Modify Window**

2. Edit the description as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.
4. To edit details of the plan:
   a. Select a plan and click **Plan Detail**. The details appear on the detail window.



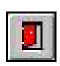

**Detail Window**

**b.** Double-click the detail line that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

c. Edit the enabled fields as necessary.
d. Click **Save** to save any changes and close the Create/Modify window.

5. Click the exit  button to close the detail window.

### Add a Plan or Plan Details

1. On the Putaway Plan Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Plan Name field, enter the name of the plan.
3. In the Description field, enter the description of the plan.
4. Click **Save** to save the changes and close the Create/Modify window.
5. To add details to the plan:
   a. Select a plan and click **Plan Detail**. The detail window opens.
   b. Click **Create Record**. The Create/Modify window opens.
   c. In the Sequence field, enter the number of the step.
   d. If the plan step uses concentric logic, enter Y in the Concentric field.
   e. In the Zone field, enter the ID of the zone, or click the LOV  button and select the zone.

f. In the Location Type field, enter the code for the location type, or click the LOV button and select the location type.

g. In the Putaway Method field, enter the name of the appropriate method. The method may be: Putaway to empty location (EMP), Putaway to location with same item/case pack/lot (SAM), or Putaway to location with different item/case pack/lot (DIF).

h. In the Max X Change field, enter the maximum amount that the X coordinate can vary by.

i. In the Max Y Change field, enter the maximum amount that the Y coordinate can vary by.

**Note:** The Max X Change and the Max Y Change fields are available only when you are using concentric logic.

j. In the Max Locations field, enter the maximum number of locations that will be filled using the detail step.

k. In the Active/Reserve field, indicate whether the plan is for reserve locations (R) or active picking locations (A). Enter A or R as necessary.

l. Click **Save** to save the changes and close the Create/Modify window.

6. Click the exit button to close the detail window.

### Delete a Plan Detail

1. On the Putaway Plan Editor window, select the plan that you want to edit.
2. Click **Plan Detail**. The details appear in the detail window.
3. Select the detail line that you want to delete.
4. Click **Delete Record**.
5. When prompted to delete the record, click **Yes**.
6. Click the exit button to close the detail window.

### Delete a Plan

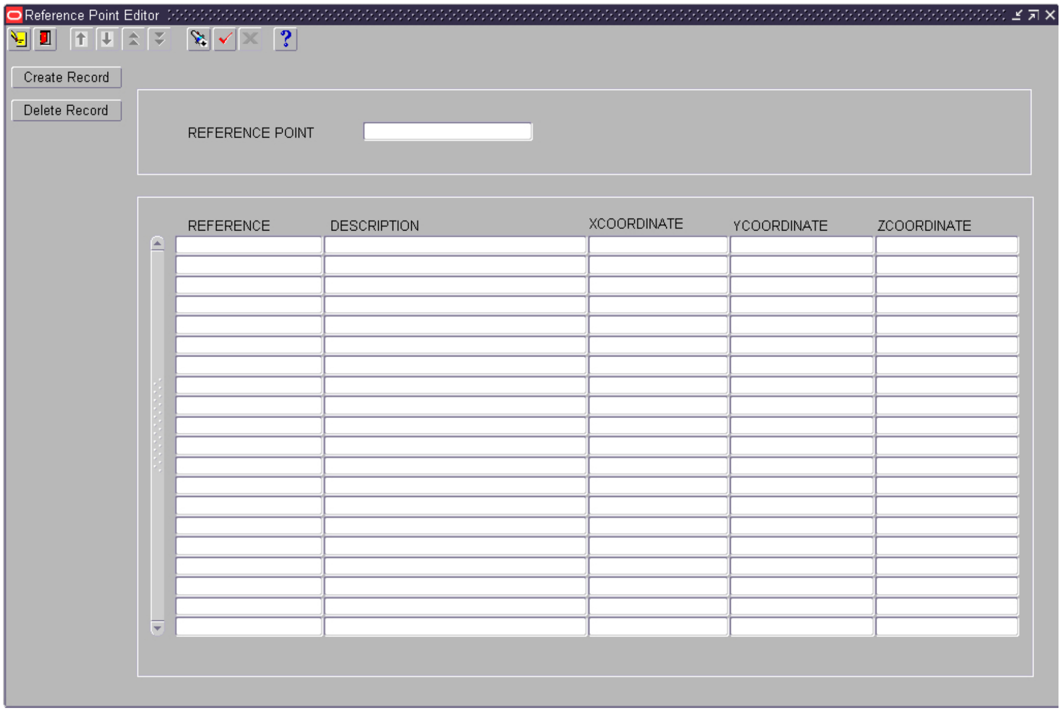
1. On the Putaway Plan Editor window, select the plan that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Putaway Plan Editor Window

- Click the exit button to close the window.

## Maintain Reference Points

**Navigate:** From the main menu, select Support Functions > DC Setup > Reference Point Editor. The Reference Point Editor window opens.




**Reference Point Editor Window**

### Display All Reference Points

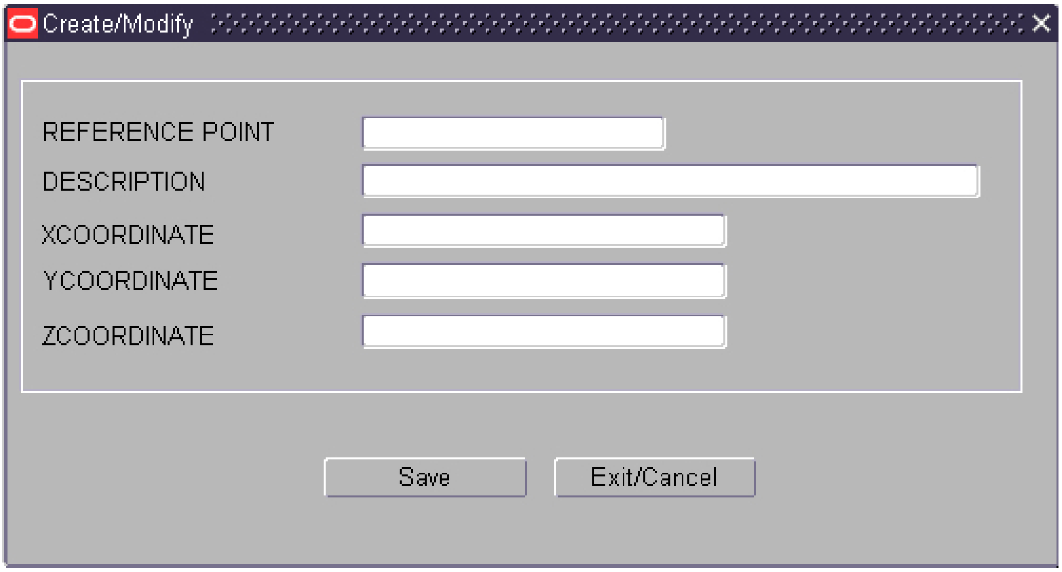
- Click the execute query button.

### Display a Reference Point

1. If any reference points are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Reference Point query field, enter the ID of the reference point, or click the LOV button and select the reference point.
4. Click the execute query button. The reference point that matches the search criterion opens.

### Edit a Reference Point

1. On the Reference Point Editor window, double-click the reference point that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description and XY coordinates as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Reference Point

1. On the Reference Point Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Reference Point and Description fields, enter the ID and description for the reference point.
3. In the X Coordinate and Y Coordinate fields, enter the position of the reference point in relation to an anchor point in the building.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Reference Point

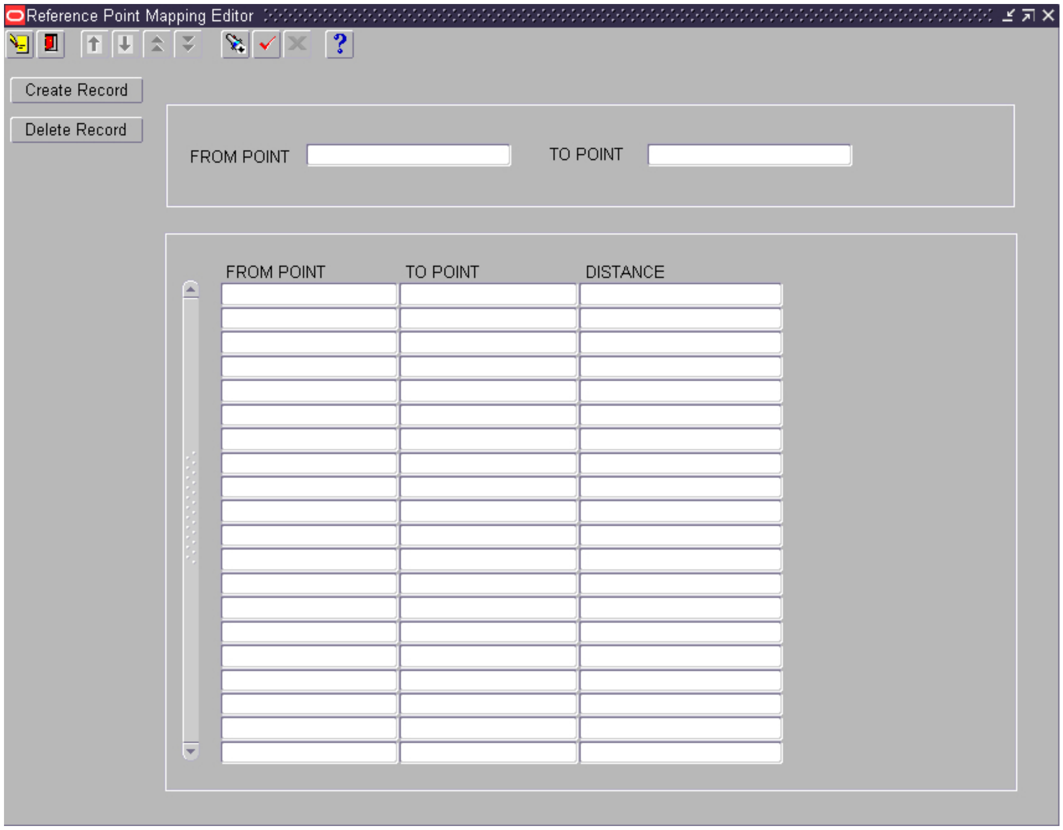
1. On the Reference Point Editor window, select the reference point that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Reference Point Editor Window

- Click the exit  button to close the window.

## Map Reference Points

**Navigate:** From the main menu, select Support Functions > DC Setup > Reference Point Map Editor. The Reference Point Mapping Editor window opens.




**Reference Point Mapping Editor Window**

### Display All Mapped Reference Points

- Click the execute query button.

### Display a Subset of Mapped Reference Points

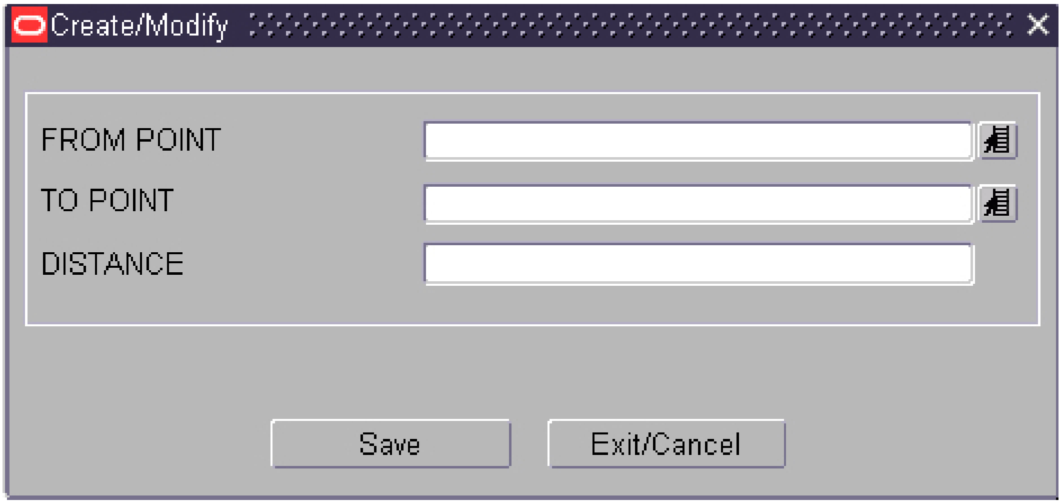
1. If any mapped reference points are currently displayed, click the clear button.
2. Click the enter query button.
3. In the From Point query field, enter the ID of the reference point from which the distance is mapped, or click the LOV button and select the reference point.
4. In the To Point query field, enter the ID of the reference point to which the distance is mapped, or click the LOV button and select the reference point.

> **Note:** You can query by From Point, To Point, or both.

5. Click the execute query button. The mapped reference points that match the search criteria appear.

### Edit Mapped Reference Points

1. On the Reference Point Mapping Editor window, double-click the mapped reference points that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the distance between the two reference points as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Map the Distance Between Two Reference Points

1. On the Reference Point Mapping Editor window, click **Create Record**. The Create/Modify window opens.
2. In the From Point and To Point fields, enter the IDs of the reference points to be mapped.
3. In the Distance field, enter the distance between the two points.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete Mapped Reference Points

1. On the Reference Point Mapping Editor window, select the mapped reference points that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Reference Point Mapping Editor Window

- Click the exit  button to close the window.

# Equipment/Zone Setup

## Equipment/Zone Setup Overview

The Equipment/Zone Setup module provides you with options for identifying and grouping the equipment used in the distribution center (DC). You can set up zones within the DC and restrict equipment classes to designated zones.

Once equipment classes are defined, you can assign them to activities, items, locations, processes, and zones. This information is used by RWMS when calculating which tasks should be assigned to operators.

### Business Process

**Equipment**

Setting up equipment classes and equipment is optional in RWMS. Equipment setup is required, however, if you intend to use XYZ functionality in the Labor Management (RLM) product. To set up equipment:

- Define equipment classes. Indicate how many pallets and the maximum weight the equipment can tolerate. Provide the horizontal and vertical clearance, as well as the vertical reach of equipment associated with the equipment class.
- Identify each piece of equipment. Assign the equipment to an equipment class. The equipment inherits the characteristics of the equipment class to which it is assigned. Provide the horizontal and vertical speeds of the equipment. Indicate whether equipment operators must be certified.

**Zones**

Zones are used to group locations where putaway, distribution, and picking tasks take place. Zones that are used for distribution and picking tasks may be grouped into zone groups. To set up zones:

- Identify the zones. Select the appropriate characteristics for each zone.
- Define zone groups. Assign zones to each zone group in order of priority.

**Equipment and zones**

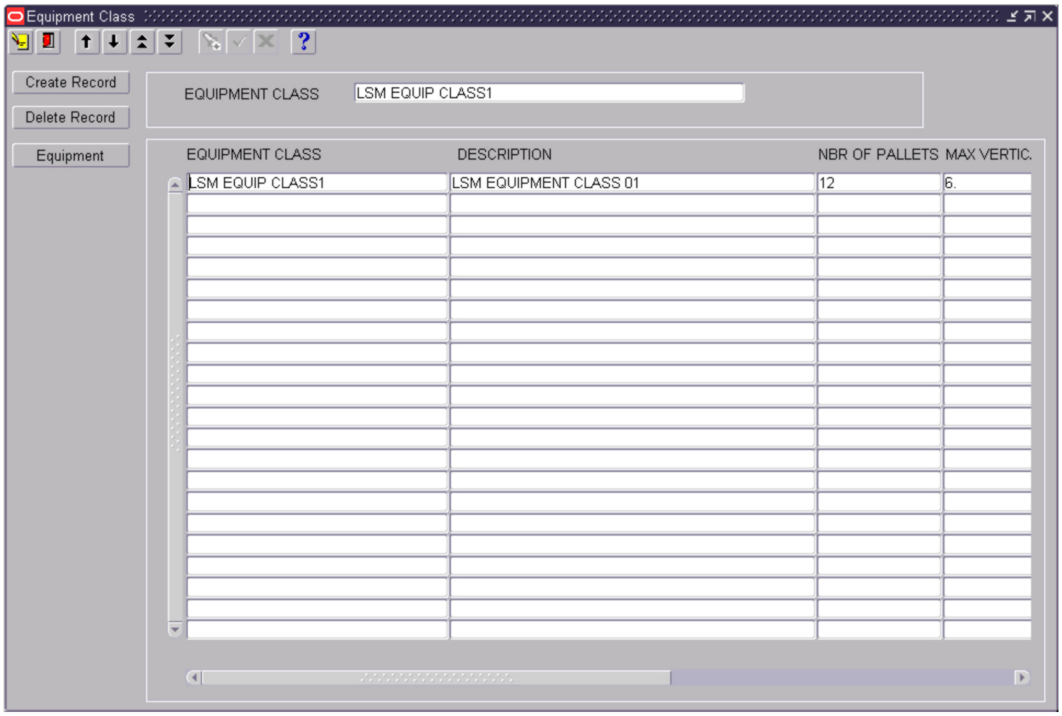
You can assign equipment classes to zones in order to restrict the use of equipment to specific zones.

### Reports

There are no reports pertaining to equipment and zone setup.

# Maintain Equipment Classes

**Navigate:** From the main menu, select Support Functions > Equipment Class Editor. The Equipment Class window opens.




**Equipment Class Window**

## Display All Equipment Classes

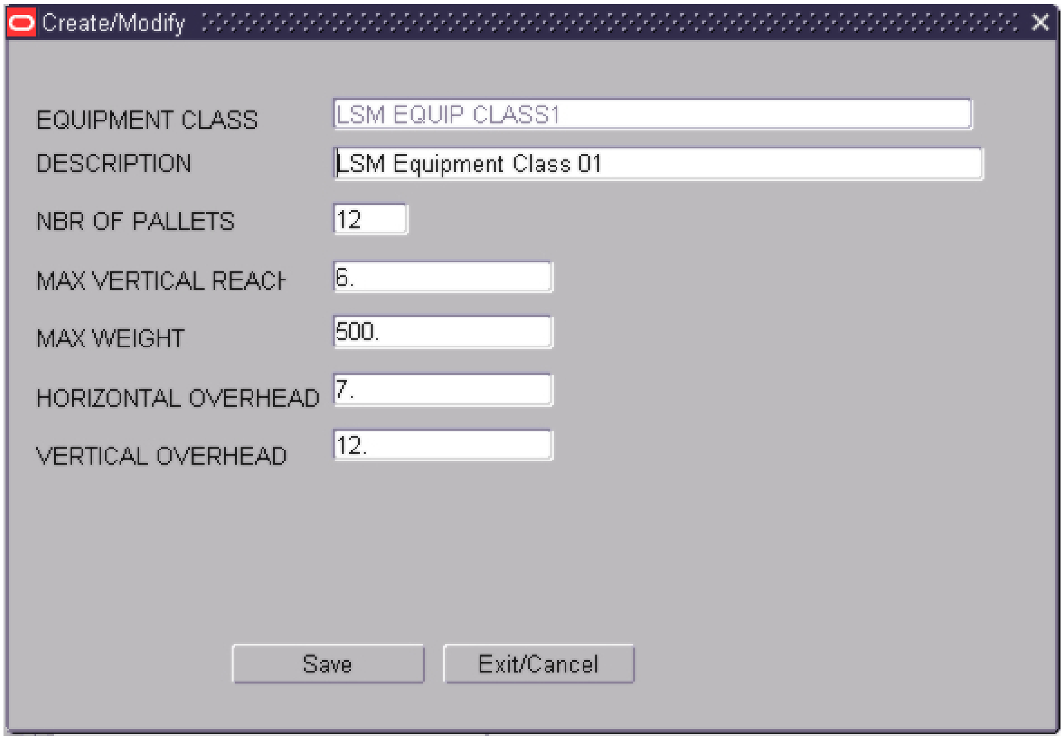
- Click the execute query  button.

## Display an Equipment Class

1. If any equipment classes are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Equipment Class query field, enter the name of the equipment class, or click the LOV  button and select the equipment class.
4. Click the execute query  button. The equipment class that matches the search criterion opens.

### Edit an Equipment Class

1. On the Equipment Class window, double-click the equipment class that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description and measurements as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add an Equipment Class

1. On the Equipment Class window, click **Create Record**. The Create/Modify window opens.
2. In the Equipment Class and Description fields, enter a name and description for the equipment class.
3. In the Nbr of Pallets field, enter the maximum number of pallets that the equipment is designed to handle.
4. In the Max Vertical Reach field, enter the maximum height the equipment can reach to.
5. In the Max Weight field, enter the maximum weight that the equipment is designed to carry.
6. In the Horizontal Overhead and Vertical Overhead fields, enter the horizontal and vertical clearance required by the equipment.
7. Click **Save** to save the changes and close the Add/Modify window.

### Delete an Equipment Class

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**Note:** You must delete any equipment assigned to an equipment class before you can delete the equipment class.

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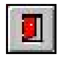
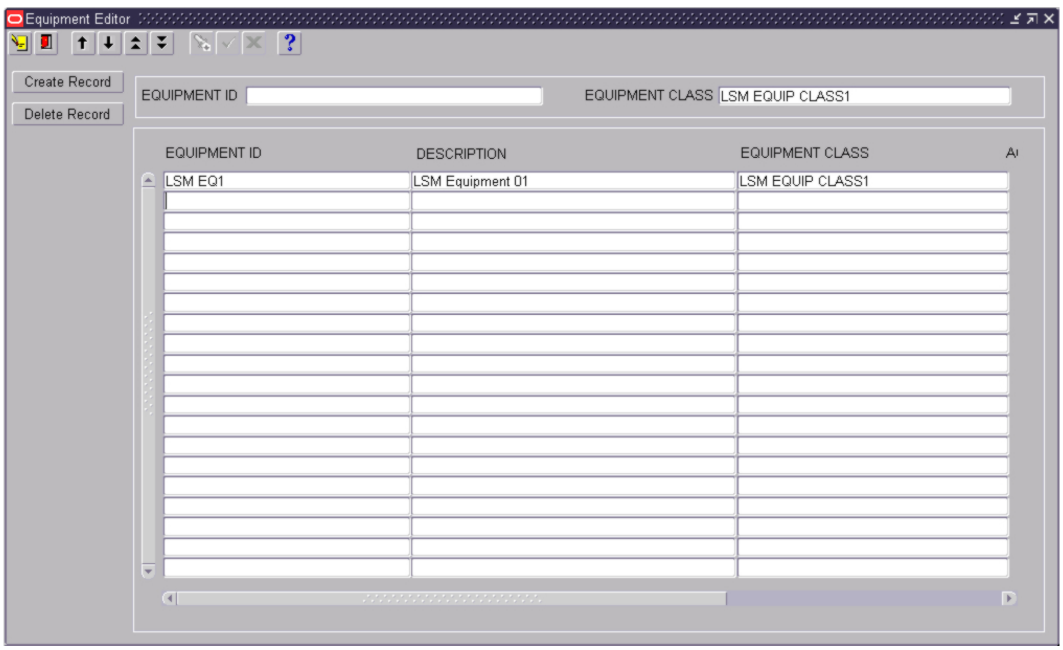
1. On the Equipment Class window, select the equipment class that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Equipment Class Window

- Click the exit  button to close the window.

## Maintain Equipment

**Navigate:** From the main menu, select Support Functions > Equipment/Zone Setup > Equipment Editor. The Equipment Editor window opens.




**Equipment Editor Window**

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**Note:** You can also access this window from the Equipment Class window.

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### Display all Equipment

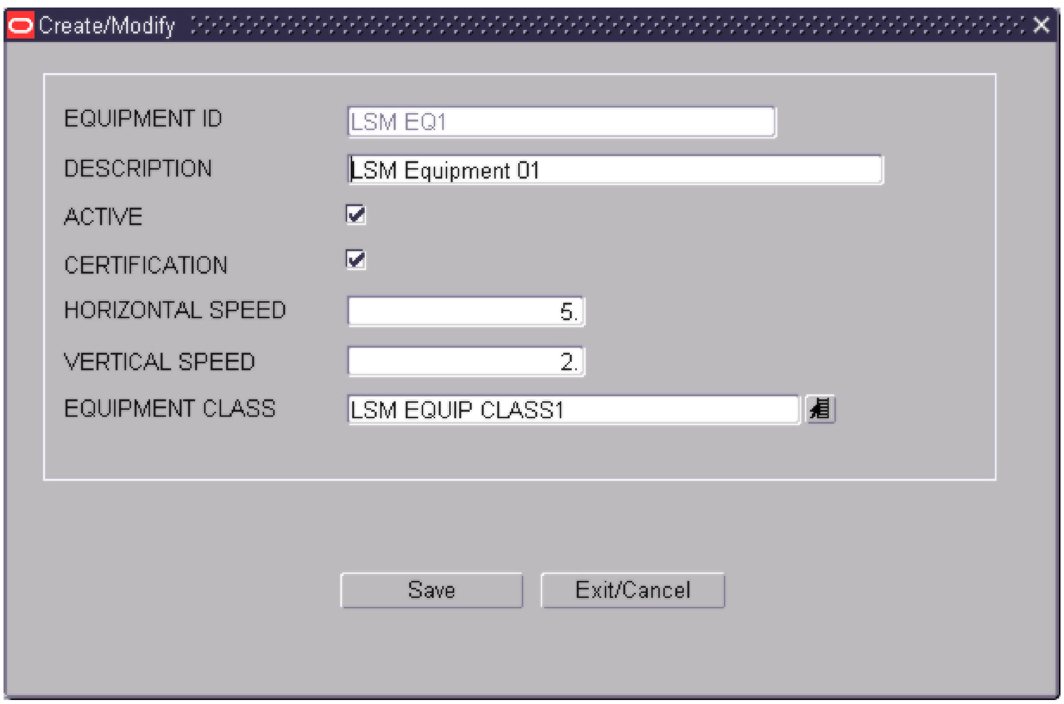
- Click the execute query  button.

### Display a Subset of the Equipment

1. If any equipment IDs are currently displayed, click the clear button.
2. Click the enter query button.
3. To search for equipment by ID, enter the ID in the Equipment ID query field, or click the LOV button and select the equipment ID.
   To search for equipment IDs by equipment class, enter the name of the equipment class in the Equipment Class query field, or click the LOV button and select the equipment class.
4. Click the execute query button. The equipment IDs that match the search criterion appear.

### Edit Equipment

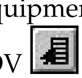
1. On the Equipment Editor window, double-click the piece of equipment that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

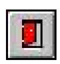
### Add Equipment

1. On the Equipment Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Equipment ID and Description fields, enter an ID and description for the piece of equipment.
3. To make the equipment ID available to users, select the Active check box.
4. To indicate that an employee must be certified to use the equipment, select the Certification check box.
5. In the Horizontal Speed and Vertical Speed fields, enter the speed of the equipment when moving horizontally and vertically.
6. In the Equipment Class field, enter the name of the equipment class to which you want to assign the piece of equipment, or click the LOV  button and select the equipment class.
7. Click **Save** to save the changes and close the Create/Modify window.

### Delete Equipment

1. On the Equipment Editor window, select the piece of equipment that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Equipment Editor Window

- Click the exit  button to close the window.

## Maintain Zones

**Navigate:** From the main menu, select Support Functions > Equipment/Zone Setup > Zone Editor. The Zone Editor window opens.


**Zone Editor Window**

> **Note:** You can also access this window from the Location Editor window.

### Display All Zones

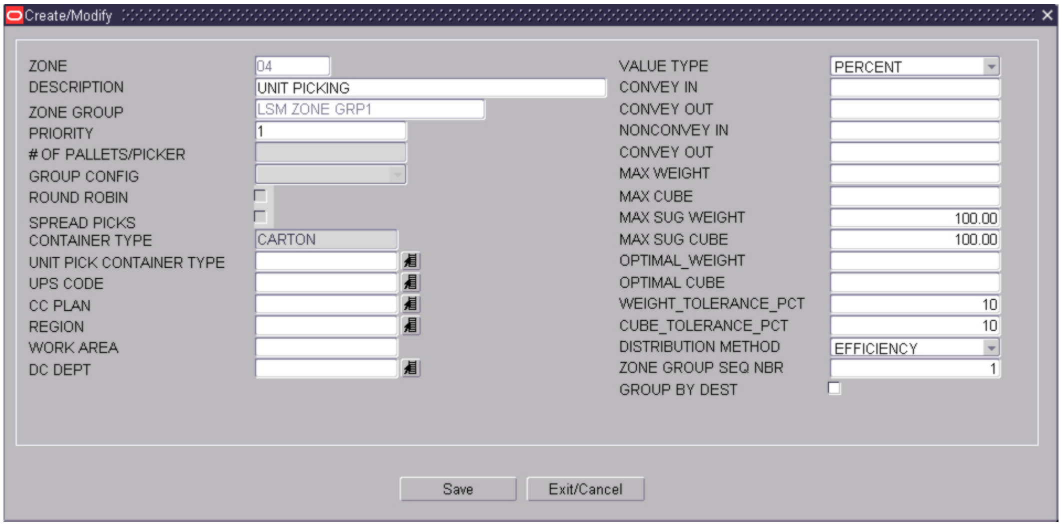
- Click the execute query  button.

### Display a Subset of Zones

1. If any zones are currently displayed, click the clear  button.
2. Click the enter query  button.
3. To search for a single zone, enter the ID of the zone in the Zone query field, or click the LOV  button and select the zone.
   To search for zones by zone group, enter the name of the zone group in the Zone Group query field, or click the LOV  button and select the zone group.
4. Click the execute query  button. The zones that match the search criterion are displayed.

## Edit a Zone

1. On the Zone Editor window, double-click the zone that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

## Add a Zone

1. On the Zone Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Zone and Description fields, enter an ID and description for the zone.
3. Enter the desired characteristics of the zone.
4. Click **Save** to save the changes and close the Create/Modify window.

## Delete a Zone

1. On the Zone Editor window, select the zone that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

## Exit the Zone Editor Window

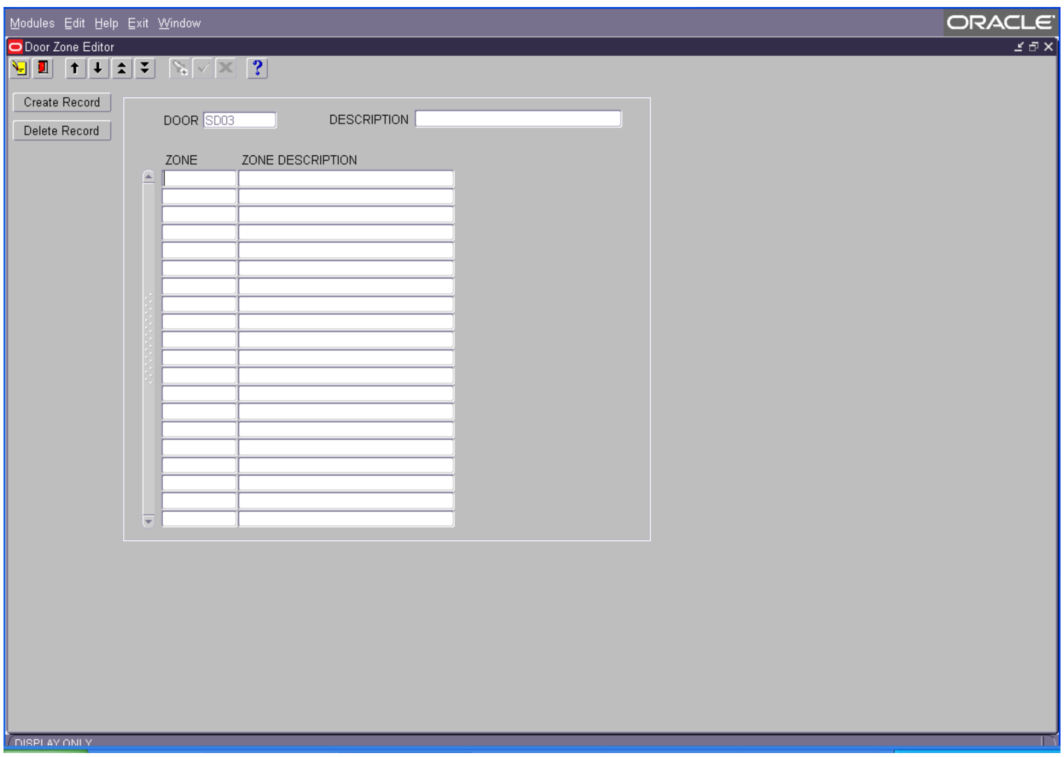
- Click the exit  button to close the window.

## Maintain Door Zone Editor

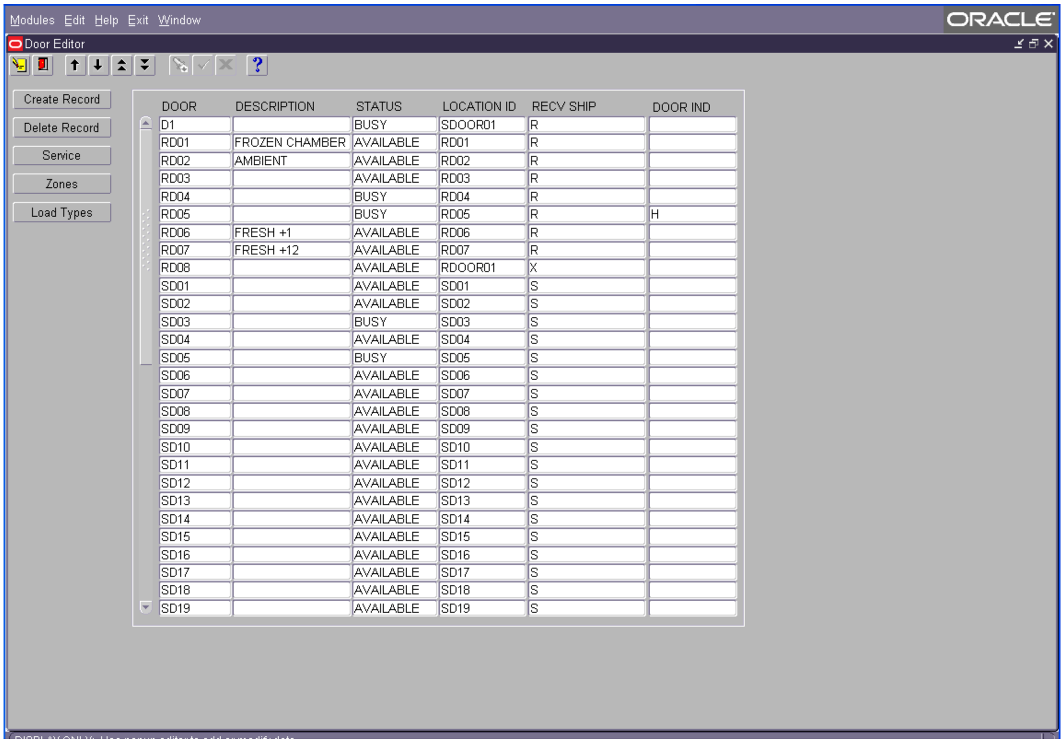
The Door Editor window allows you to maintain shipping and receiving doors. Before setting up a door, be sure a location ID exists for the door as every door must be identified as a location. You can indicate whether a door is used for shipping, receiving, or both. You can also indicate the type of merchandise handled at a door, such as hanging, flat, shoe, or all.

The status of the door may be Available, Out of Service, or Busy. You can change the status from Available to Out of Service and back to Available as necessary. Each receiving door may be associated with one or more “zones”. When recommending/prioritizing doors for receiving appointments, the system will consider item put-away zones for items on the appointment and select doors based on the number of items with matching zones.

**Navigate:** From the main menu, select Support Functions > DC Setup > Door Editor. The current doors appear in the Door Editor window. Select a door, click Zones. The Door Zone Editor window opens.



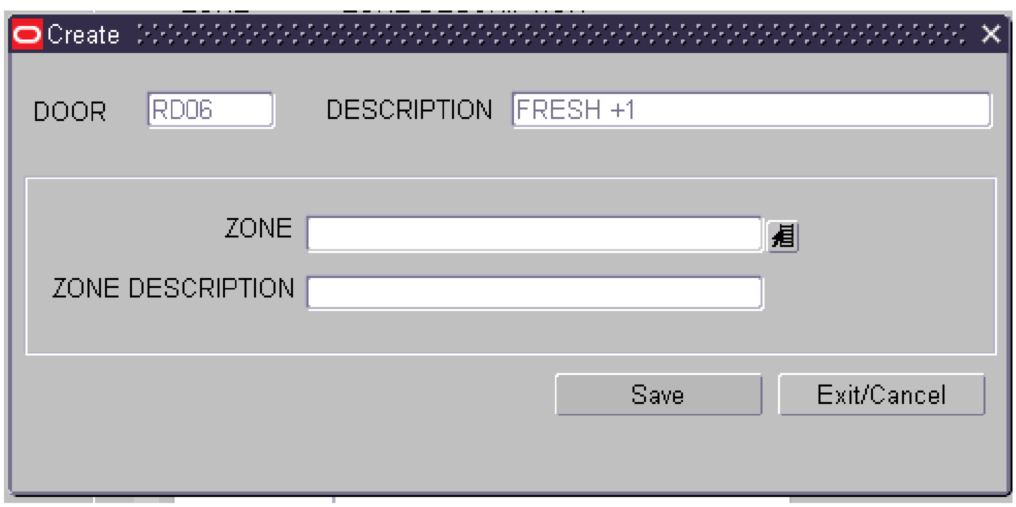

**Zone Door Editor Window**




**Door Editor Window**

## Create/Edit a Record

1. On the Door Zone Editor window, double-click the door that you want to create/edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

## Delete a Record

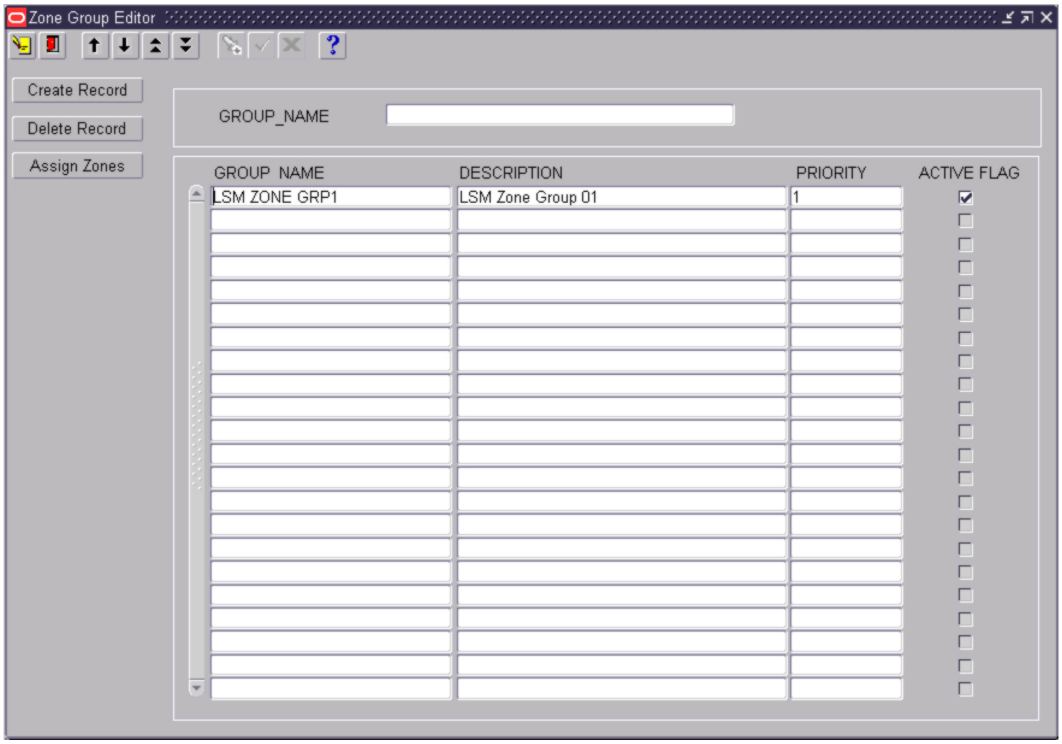
1. On the Door Zone Editor window, select the door that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Door Zone Editor Window

- Click the exit button to close the window.

## Maintain Zone Groups

**Navigate:** From the main menu, select Support Functions > Equipment/Zone Setup > Zone Group Editor. The Zone Group Editor window opens.




**Zone Group Editor Window**

### Display All Zone Groups

- Click the execute query button.

### Display a Zone Group

1. If any zone groups are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Group Name query field, enter the name of the zone group, or click the LOV button and select the zone group.
4. Click the execute query button. The zone group that matches the search criterion opens.

### Edit a Zone Group

1. On the Zone Group Editor window, double-click the zone group that you want to edit. The Add/Modify window opens.


**Add/Modify Window**

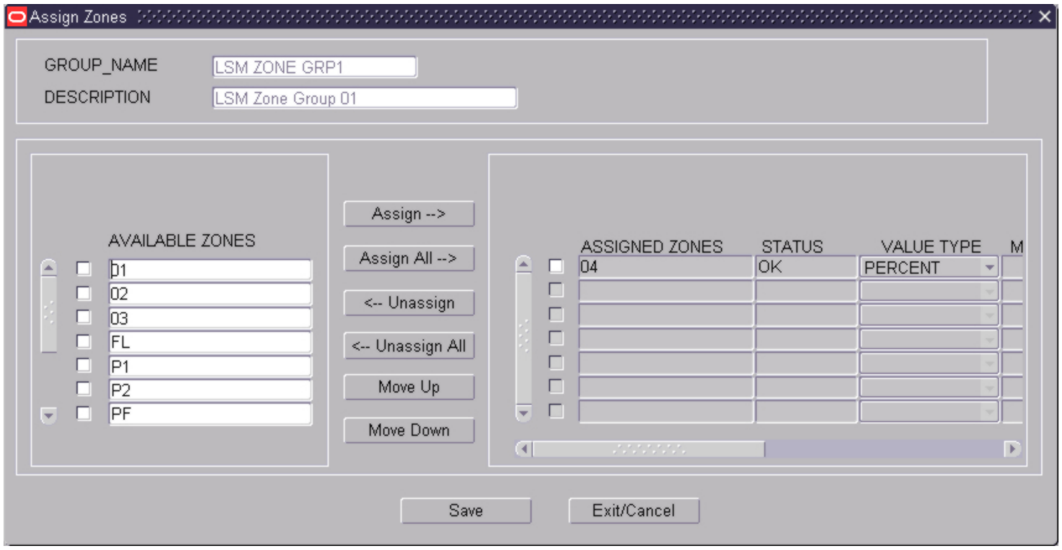
2. Edit the description, priority level for picking, and active option as necessary.
3. Click **Save** to save any changes and close the Add/Modify window.

### Add a Zone Group

1. On the Zone Group Editor window, click **Create Record**. The Add/Modify window opens.
2. In the Group Name and Description fields, enter a name and description for the zone group.
3. In the Priority field, enter the priority level of the zone group for picking activities.
4. To make the zone group available to users, select the Active Flag check box.
5. Click **Save** to save the changes and close the Add/Modify window.

### Assign Zones to a Zone Group

1. On the Zone Group Editor window, select the zone group that you want to edit.
2. Click **Assign Zones**. The Assign Zones window opens.




**Assign Zones Window**

3. To assign zones:
   a. Select the check box next to the desired zones on the Available Zones table.
   b. Click **Assign**. The selected zones are moved to the Assigned Zones table.
4. To remove assigned zones:
   a. Select the check box next to the desired zones on the Assigned Zones table.
   b. Click **Unassign**. The selected zones are moved to the Available Zones table.
5. Click **Save** to save any changes and close the Assign Zones window.

> **Note:** In the Assign Zones window, you can 1) click **Assign All** to move all zones to the Assigned Zones table or 2) click **Unassign All** to move all zones to the Available Zones table. All zones are moved whether or not the check boxes are selected.

### Resequence the Zones in a Zone Group

1. On the Zone Group Editor window, select the zone group that you want to edit.
2. Click **Assign Zones**. The available and assigned zones for the zone group are displayed in the Assign Zones window.
3. To resequence the assigned zones:
   a. Select the zone to be moved.
   b. To move the zone closer to the top of the list, click **Move Up**.
   c. To move the zone closer to the bottom of the list, click **Move Down**.
4. Click **Save** to save any changes and close the Assign Zones window.

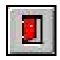
### Delete a Zone Group

1. On the Zone Group Editor window, select the zone group that you want to delete.

> **Note:** You can not delete a zone group if any zones have been assigned to the zone group.

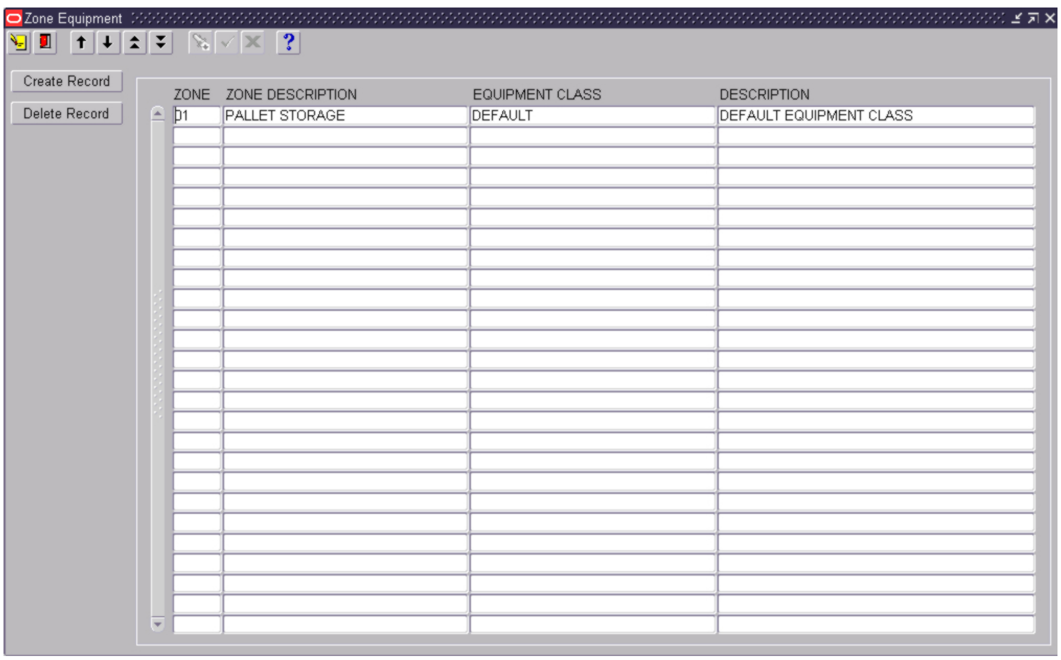
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Zone Group Editor Window

- Click the exit  button to close the window.

## Assign Equipment Classes to Zones

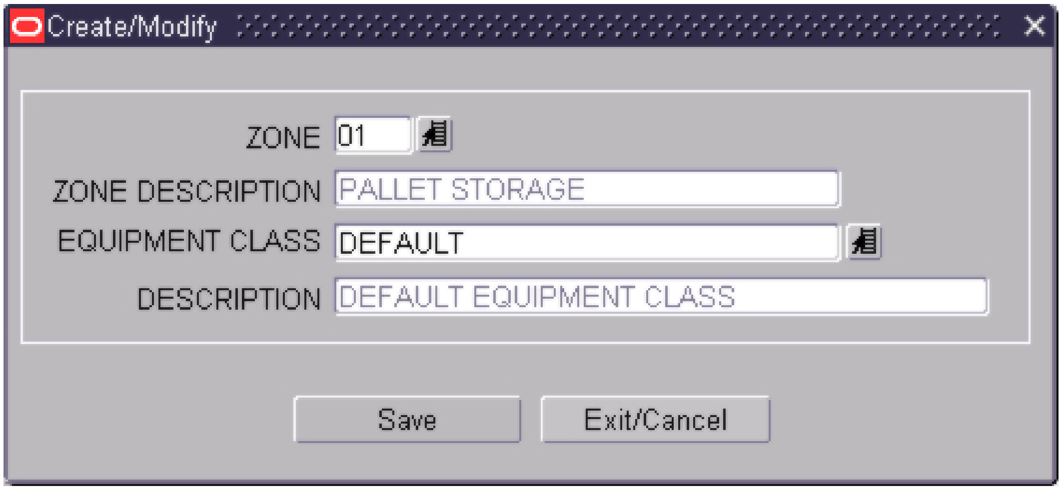
**Navigate:** From the main menu, select Support Functions > Equipment/Zone Setup > Zone Equipment Editor. The current assignments appear in the Zone Equipment window.




**Zone Equipment Window**

### Edit an Assignment

1. On the Zone Equipment window, double-click the assignment that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit either the zone and equipment class as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add an Assignment

1. On the Zone Equipment window, click **Create Record**. The Create/Modify window opens.
2. In the Zone field, enter the ID of the zone, or click the LOV  button and select the zone.
3. In the Equipment Class field, enter the name of the equipment class, or click the LOV  button and select the equipment class.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete an Assignment

1. On the Zone Equipment window, select the assignment that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Zone Equipment Window

- Click the exit  button to close the window.

# Item Setup

## Item Setup Overview

Items and many of the details pertaining to items are downloaded from the host system. At the DC, however, additional attributes and details may be required.

In the Item Setup module, you can maintain the details and attributes specific to material handling in the DC. You also have visibility to additional item details which cannot be edited in RWMS.

If you have access to a warehouse optimization application, you can transmit SKU profiles to the application on demand. In return, the application recommends tasks for optimizing the SKU profiles.

### Business Process

The following types of tasks may be performed in the Item Setup module:

1. Define combinability codes and attributes:
   - Combinability codes: Combinability codes prevent the packaging of incompatible merchandise in the same carton. Create the combinability codes, identify the incompatible codes for each, define one or more attribute types for combinability codes, define attributes to correspond with each combinability code. Assign the attributes to items.
   - Attributes: Define attribute types. Select the combinability or carton group options, if applicable. Define attributes and associate them with attribute types. When applicable, assign WIP codes to attributes. Assign the attributes to items.
2. Indicate which item fields are owned by the host system and which are owned by the DC. Item fields owned by the DC are protected from updates sent by the host system. Conversely, item fields owned by the host system are protected from updates in RWMS.
3. Set up default characteristics and attributes for items by department, class, subclass, or vendor style. When items are received from the host system or manually entered, they inherit the appropriate defaults.
4. Set up item classes. Item classes are used to group items with similar defaults, processes, and equipment classes. When an item class is assigned to an item, the item inherits the settings of the item class. If necessary, you can a) edit the defaults at the item level and b) edit the processes and equipment classes at the item configuration level.
5. Add or edit items. Although items are received from the host system, it is possible to manually add items. Details may be edited for items received from the host and for manually-created items. Edit the item configurations and the component items of kits as necessary.
6. Set up the vendor audit and quality audit percentages by vendor. The appropriate WIP codes are automatically assigned to inbound containers from the vendors. For each audit type, you can assign the following:
   - Frequency: Percentage of shipments to be audited.
   - Sampling: Percentage of each shipment to be audited.

**7.** View item and vendor details. You can view but not edit the following:

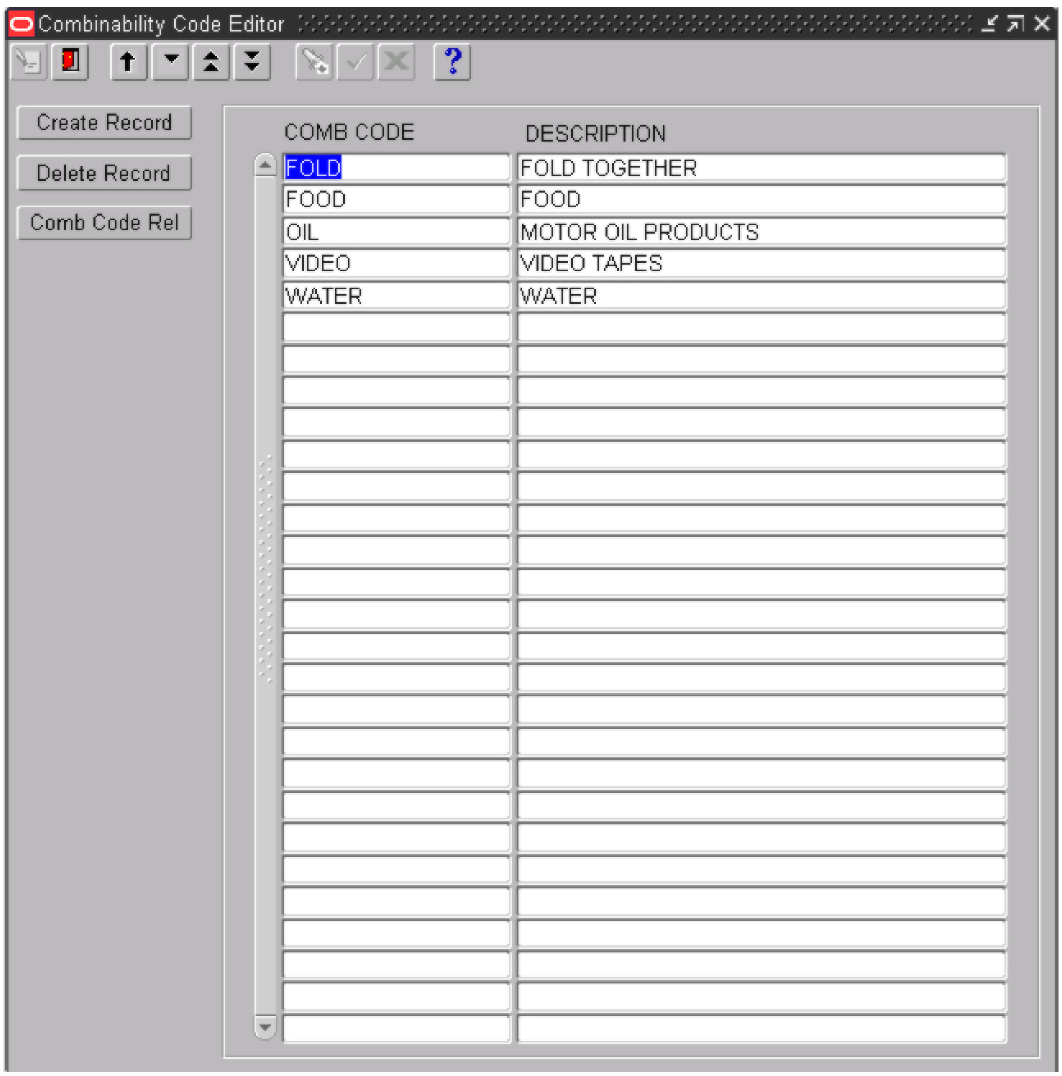
- Diff groups, diffs, and item diffs.
- Universal product codes (UPC) by item.
- Multi-price ticketing by item.
- Vendor addresses.

### Reports

The Item Class Profile report lists all defaults, processes, and equipment classes assigned to a specified item class or item. At the item class level, you can choose to display all items that are members of the item class or only those members with exceptions.

## Maintain Combinability Codes

**Navigate:** From the main menu, select Support Functions > Item Setup > Combinability Code Editor. The current combinability codes appear in the Combinability Code Editor window.




**Combinability Code Editor Window**

### Edit a Combinability Code

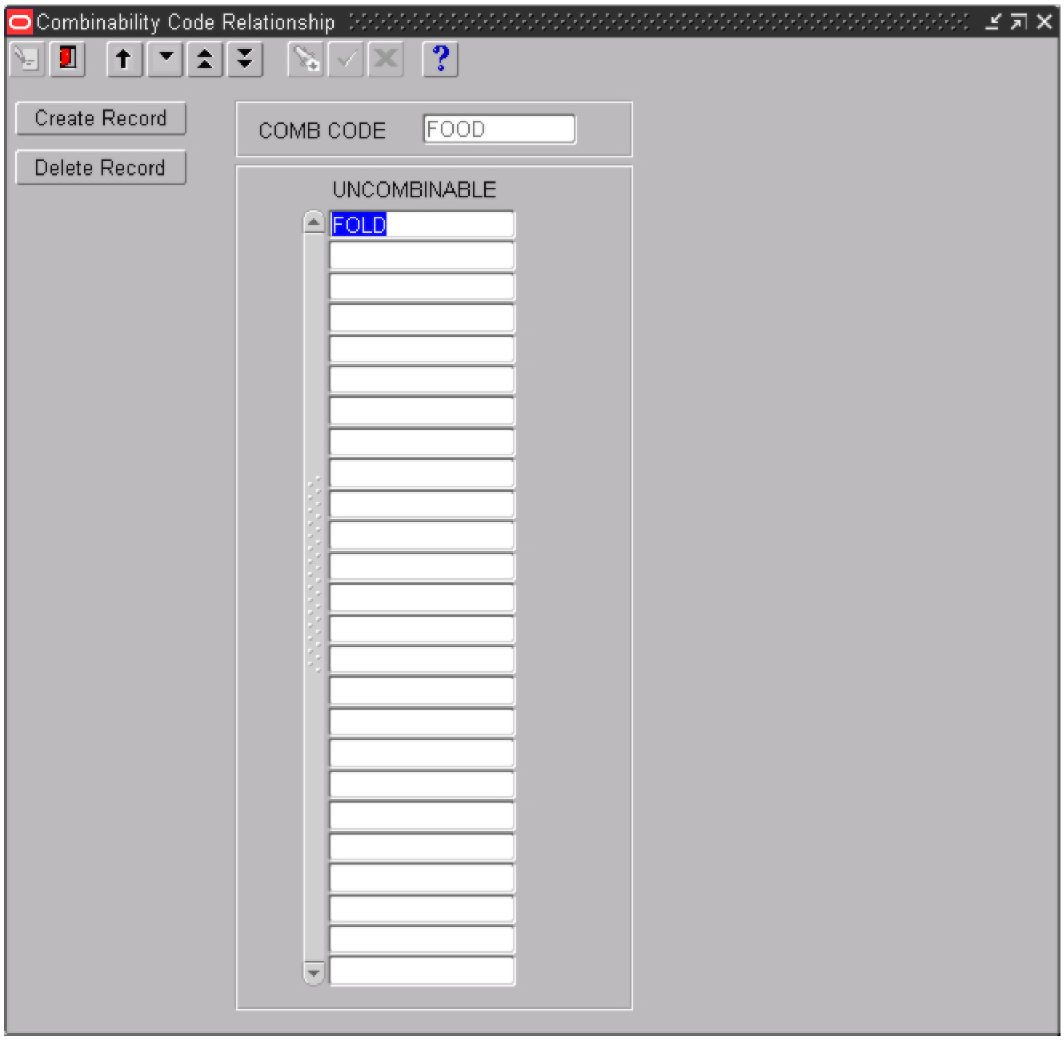
1. On the Combinability Code Editor window, double-click the combinability code that you want to edit. The Create/Modify window opens.


**Create/Modify Window**

2. Edit the description as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Maintain Uncombinable Codes

1. On the Combinability Code Editor window, select the combinability code that you want to edit.
2. Click **Comb Code Rel**. The Combinability Code Relationship window opens.




**Combinability Code Relationship Window**

3. To add an uncombinable code:
   a. Click **Create Record**. The Create window opens.


**Create Window**

   b. In the Uncombinable field, enter the appropriate code, or click the LOV button and select the code.
   c. Click **Save** to save the changes and close the Create window.
4. To delete an uncombinable code:
   a. Select the uncombinable code that you want to delete.
   b. Click **Delete Record**.
   c. When prompted to delete the record, click **Yes**.
5. Click the exit button to close the Combinability Code Relationship window.

### Add a Combinability Code

1. On the Combinability Code Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Comb Code field, enter a combinability code.
3. In the Description field, enter a description for the combinability code.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Combinability Code

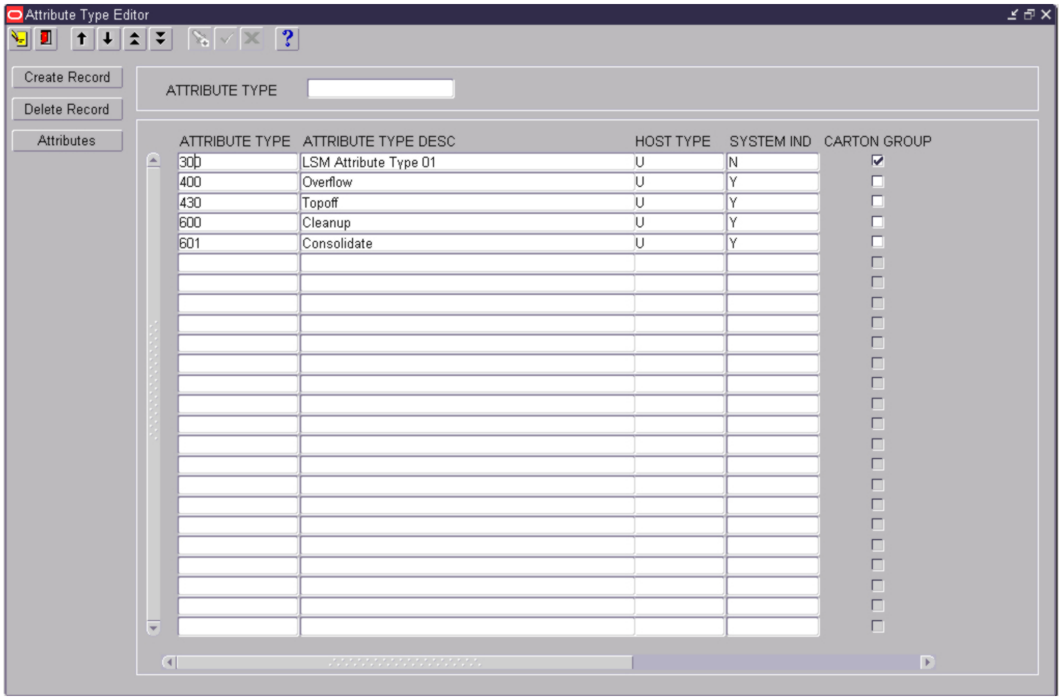
1. On the Combinability Code Editor window, select the combinability code that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Combinability Code Editor Window

- Click the exit button to close the window.

## Maintain Attribute Types

**Navigate:** From the main menu, select Support Functions > Item Setup > Attribute Type Editor. The Attribute Type Editor window opens.




**Attribute Type Editor Window**

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**Note:** You can also access this window from the following windows: Attribute Editor, Item Attribute Editor, Attribute Default Editor, and Location Attribute Editor.

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### Display All Attribute Types

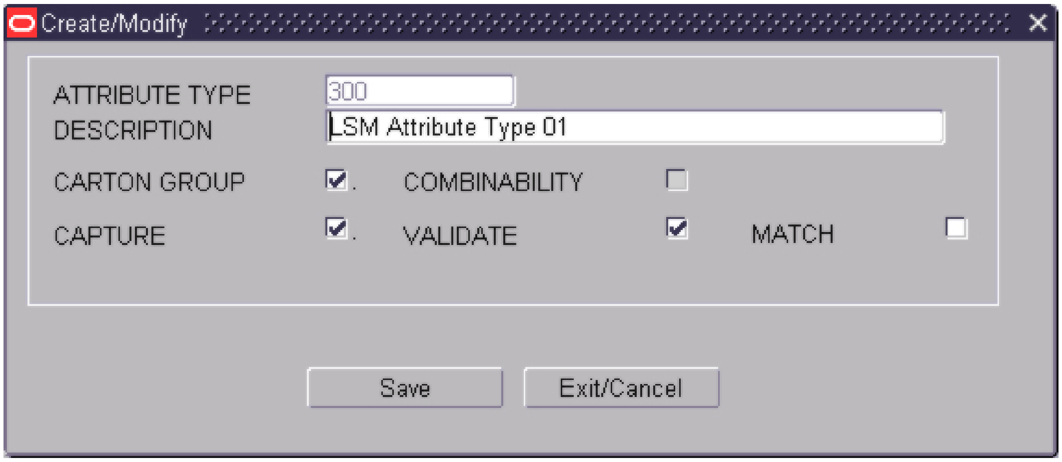
- Click the execute query  button.

### Display an Attribute Type

1. If any attribute types are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Attribute Type query field, enter the ID of an attribute type, or click the LOV  button and select the attribute type.
4. Click the execute query  button. The attribute type that matches the search criterion opens.

### Edit an Attribute Type

1. On the Attribute Type Editor window, double-click the attribute type that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

> **Note:** You can not edit an attribute type if the system indicator equals Y (Yes).

2. Edit the description as necessary.
3. To associate the appropriate characteristics with the attribute type, select or clear the check boxes next to each characteristic.

   Use **Validate** check box to verify that the information provided by the system in a field is correct.

   Use **Match** check box if both an item and a location must have the same attribute in order for the item to be stored in the location.

   Use **Capture** to store information concerning a transaction in the system.
4. Click **Save** to save any changes and close the Create/Modify window.

### Add an Attribute Type

1. On the Attribute Type Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Attribute Type and Description fields, enter an ID and description for the attribute type.
3. Select the Carton Group check box if the attribute type pertains to cartonization.
4. Select the Combinability check box if the attribute type pertains to combinability restrictions.
5. Select the check box next to the operations that you want to associate with the attribute type.
6. Click **Save** to save the changes and close the Create/Modify window.

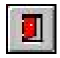
### Delete an Attribute Type

1. On the Attribute Type Editor window, select the attribute type that you want to delete.

> **Note:** You can not delete an attribute type if the system indicator equals Y (Yes).

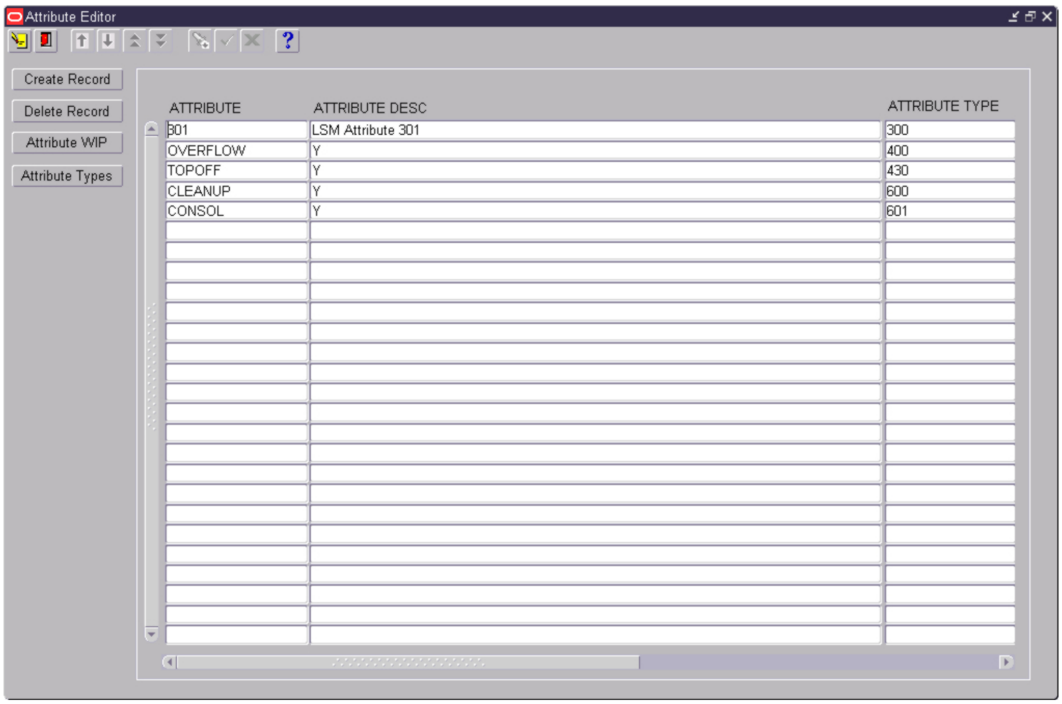
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Attribute Type Editor Window

- Click the exit  button to close the window.

## Maintain Attributes

**Navigate:** From the main menu, select Support Functions > Item Setup > Attribute Editor. The current attributes appear in the Attribute Editor window.

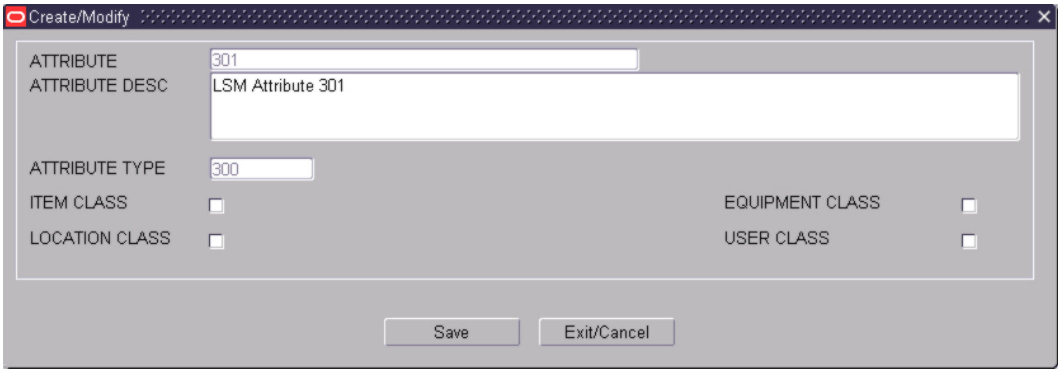



**Attribute Editor Window**

> **Note:** You can also access this window from the Attribute Type Editor window.

### Edit an Attribute

1. On the Attribute Editor window, double-click the attribute that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

> **Note:** You can not edit an attribute type if the system indicator is selected.

2. Edit the description as necessary.
3. To make an attribute available for a class, select the check box next to each desired class.
4. Click **Save** to save any changes and close the Create/Modify window.

### Add an Attribute

1. On the Attribute Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Attribute and Attribute Desc fields, enter an ID and description for the attribute.
3. In the Attribute Type field, enter the ID for the attribute type that you want to associate with the attribute, or click the LOV  button and select the attribute type.
4. Select the check box next to each class that want to make the attribute available for.
5. Click **Save** to save the changes and close the Create/Modify window.

### Delete an Attribute

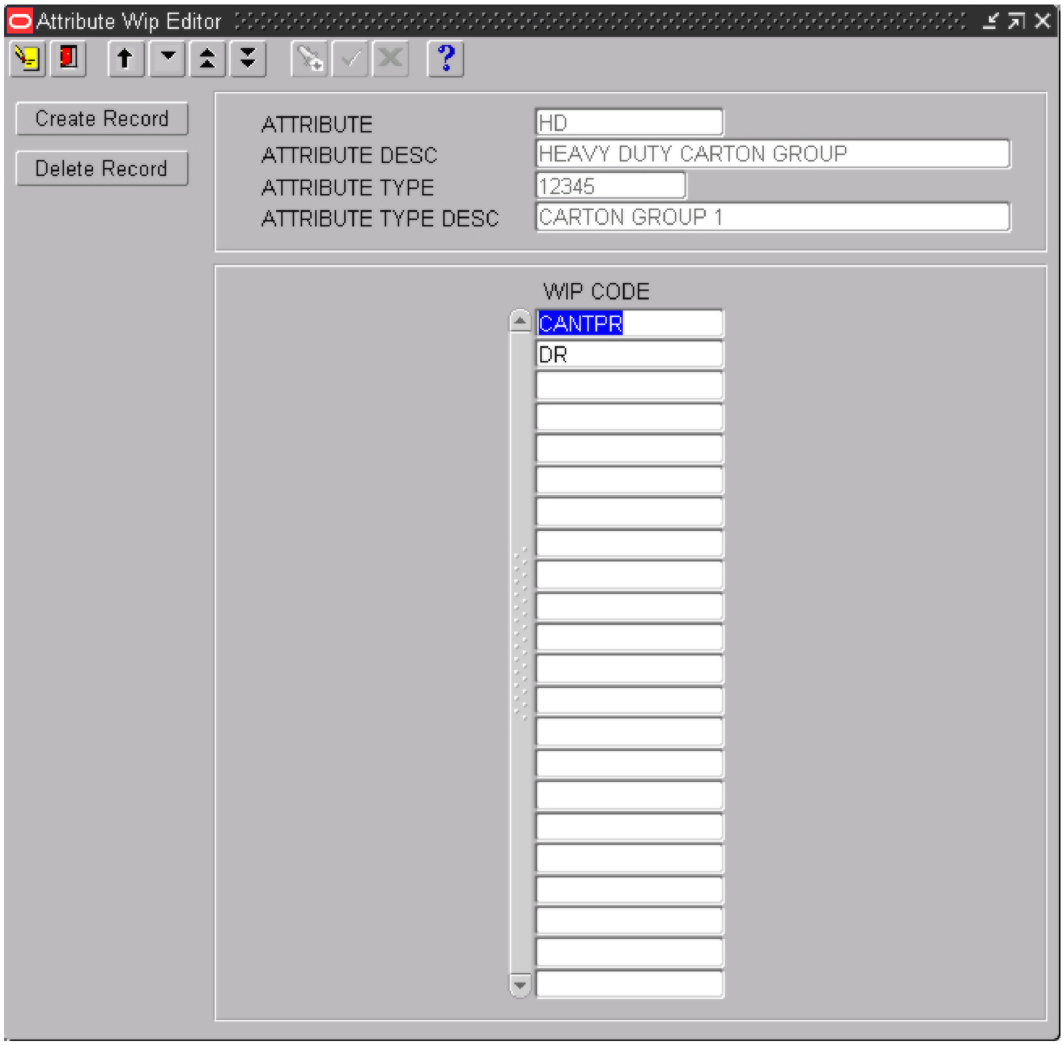
1. On the Attribute Editor window, select the attribute that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Attribute Editor Window

- Click the exit  button to close the window.

## Maintain Attribute WIP Codes

**Navigate:** From the main menu, select Support Functions > Item Setup > Attribute WIP Editor. The Attribute WIP Editor window opens.




**Attribute WIP Editor Window**

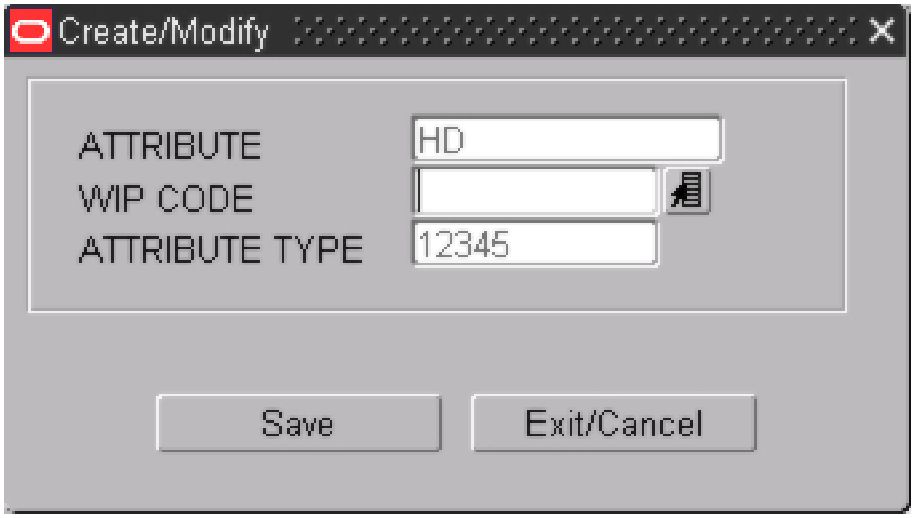
> **Note:** You can also access this window from the Attribute Editor window and the Item Attribute Editor window.

### Display Attribute WIP Codes

1. If an attribute is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Attribute query field, enter the code for an attribute, or click the LOV  button and select an attribute.
4. Click the execute query  button. The WIP codes associated with the selected attribute appear.

### Add a WIP Code

1. On the Attribute WIP Editor window, click **Create Record**. The Create/Modify window opens.



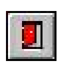

**Create/Modify Window**

2. In the WIP Code field, enter the desired WIP code, or click the LOV  button and select the WIP code.
3. Click **Save** to save the changes and close the Create/Modify window.

### Delete a WIP Code

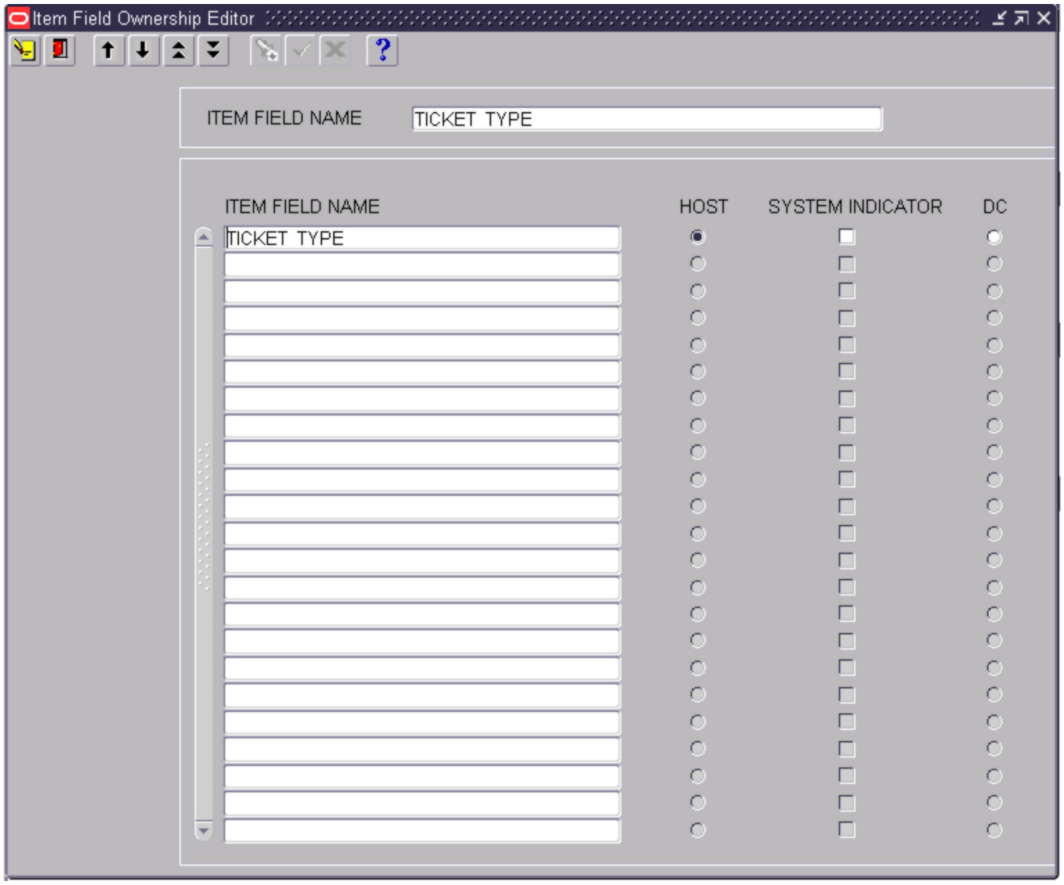
1. On the Attribute WIP Editor window, select the WIP code that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Attribute WIP Editor Window

- Click the exit  button to close the window.

# Maintain Item Field Ownership Settings

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Field Ownership. The Item Field Ownership Editor window opens.




**Item Field Ownership Editor Window**

## Display All Item Fields

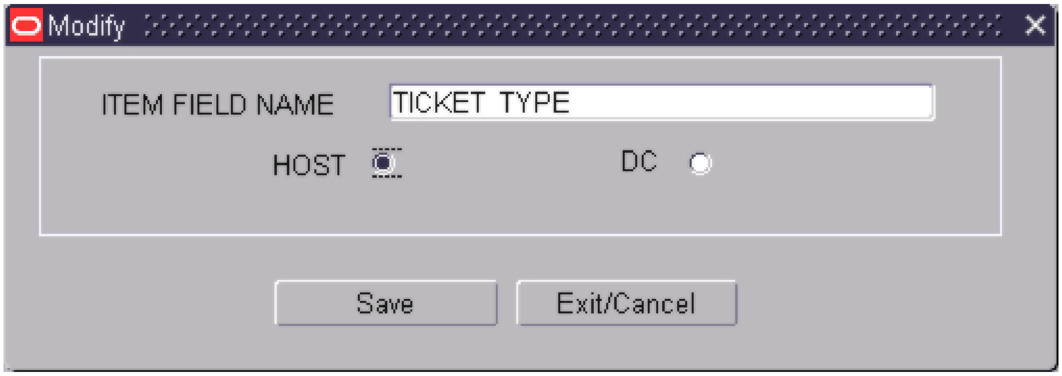
- Click the execute query  button.

## Display an Item Field

1. If any item fields are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Item Field Name query field, enter the field name, or click the LOV  button and select the field.
4. Click the execute query  button. The item field that matches the search criterion opens.

### Edit Ownership of an Item Field

1. On the Item Field Ownership Editor window, double-click the item field that you want to edit. The Modify window opens.

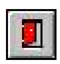



**Modify Window**

> **Note:** You can not edit ownership of an item field if the system indicator is selected.

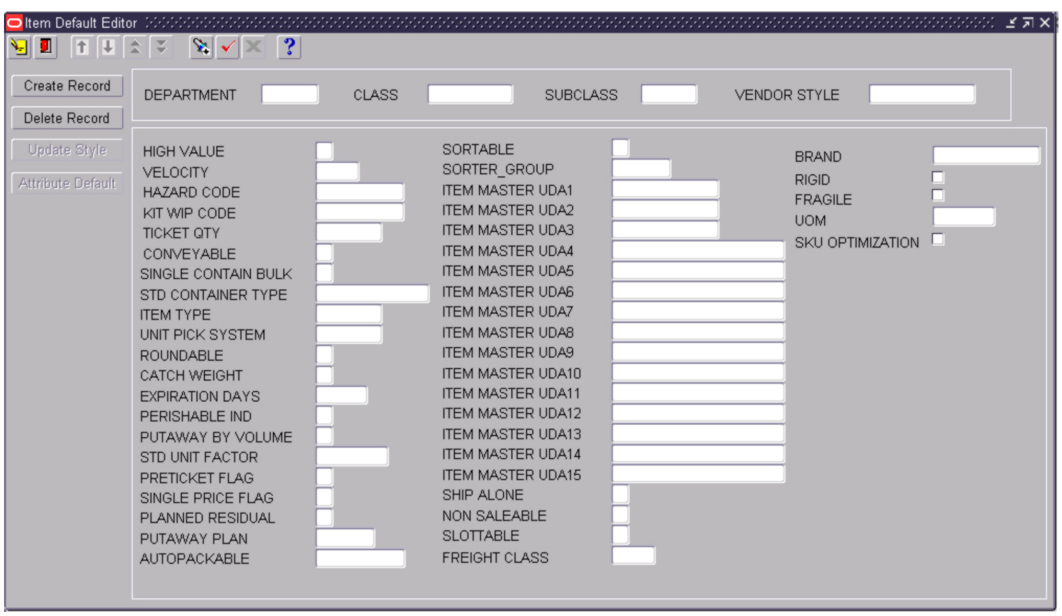
2. Indicate whether the item field should be owned by the host system or the distribution center (DC).
3. Click **Save** to save any changes and close the Modify window.

### Exit the Item Field Ownership Editor Window

- Click the exit  button to close the window.

## Maintain Item Defaults

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Default Editor. The Item Default Editor window opens.




**Item Default Editor Window**

## Display Item Defaults

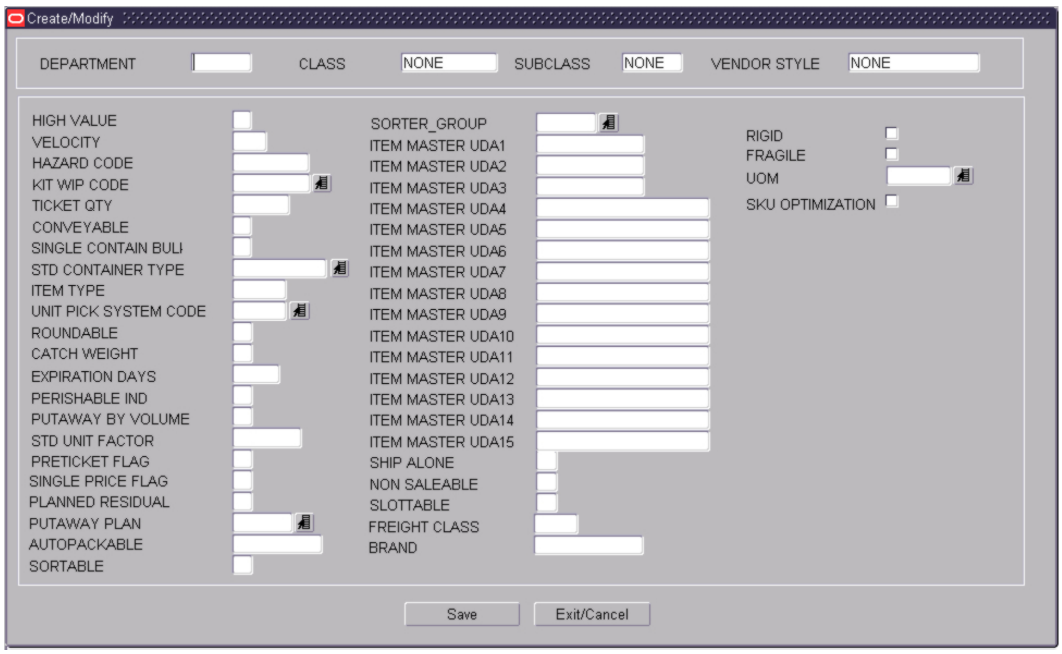
1. Click the enter query button.
2. Enter search criteria in the Department, Class, Subclass, and Vendor Style query fields as necessary.

> **Note:** You can choose to edit defaults at any one of the merchandise levels.

3. Click the execute  query button. The defaults for the selected merchandise level appear.

## Edit Item Defaults

1. On the Item Default Editor window, double-click any detail field. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.
4. If changes are made to defaults for a vendor style, click **Update Style**. The changes are applied to the items associated with the vendor style.

### Add Item Defaults

1. On the Item Default Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Department, Class, Subclass, and Vendor Style fields, enter the IDs for the merchandise levels that you want to set up.
3. Enter details in the required fields:
   a. Single Container Bulk: Enter Y (Yes) or N (No) to indicate whether the item is a single container bulk item.
   b. In the Unit Pick System Code field, enter the code for the unit pick system or click the LOV  button and select the unit pick system.
   c. In the Roundable field, enter Y (Yes) or N (No) to indicate that the quantity may be rounded to the nearest case when replenished.
   d. In the Catch Weight field, enter Y (Yes) or N (No) to indicate whether the item must be weighed upon receipt.
   e. In the Perishable Ind field, enter Y (Yes) or N (No) to indicate whether the item is perishable.
   f. In the Preticket Flag field, enter Y (Yes) or N (No) to indicate whether the item must ticketed upon receipt.
   g. In the Single Price Flag field, enter Y (Yes) or N (No) to indicate whether the item has a single currency ticket.
   h. In the Planned Residual field, enter Y (Yes) or N (No) to indicate whether the residuals are to be returned to stock.
4. Enter any additional details as necessary.
5. Click **Save** to save the changes and close the Create/Modify window. The changes are applied to all items within the selected merchandise hierarchy.
6. If changes are made to defaults for a vendor style, click **Update Style**. The changes are applied to the items associated with the vendor style.

### Delete Item Defaults

1. On the Item Default Editor window, click **Delete Record**.
2. When prompted to delete the record, click **Yes**. The changes are applied to all items within the selected merchandise hierarchy.

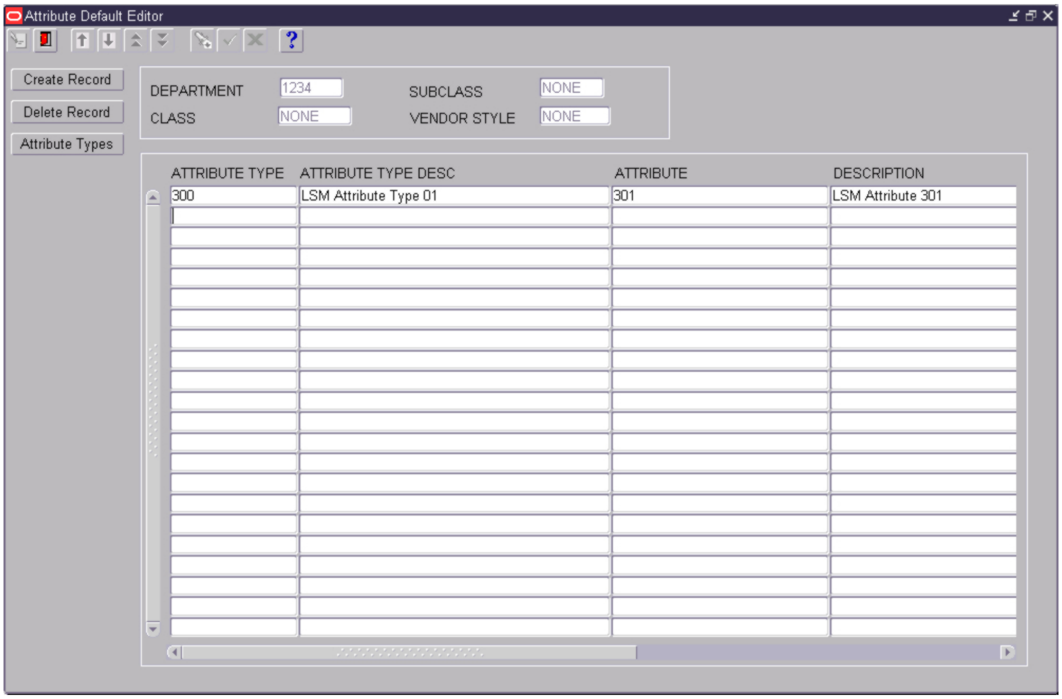
### Exit the Item Default Editor Window

- Click the exit  button to close the window.

## Maintain Item Attribute Defaults

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Default Editor. The Item Default Editor window opens.

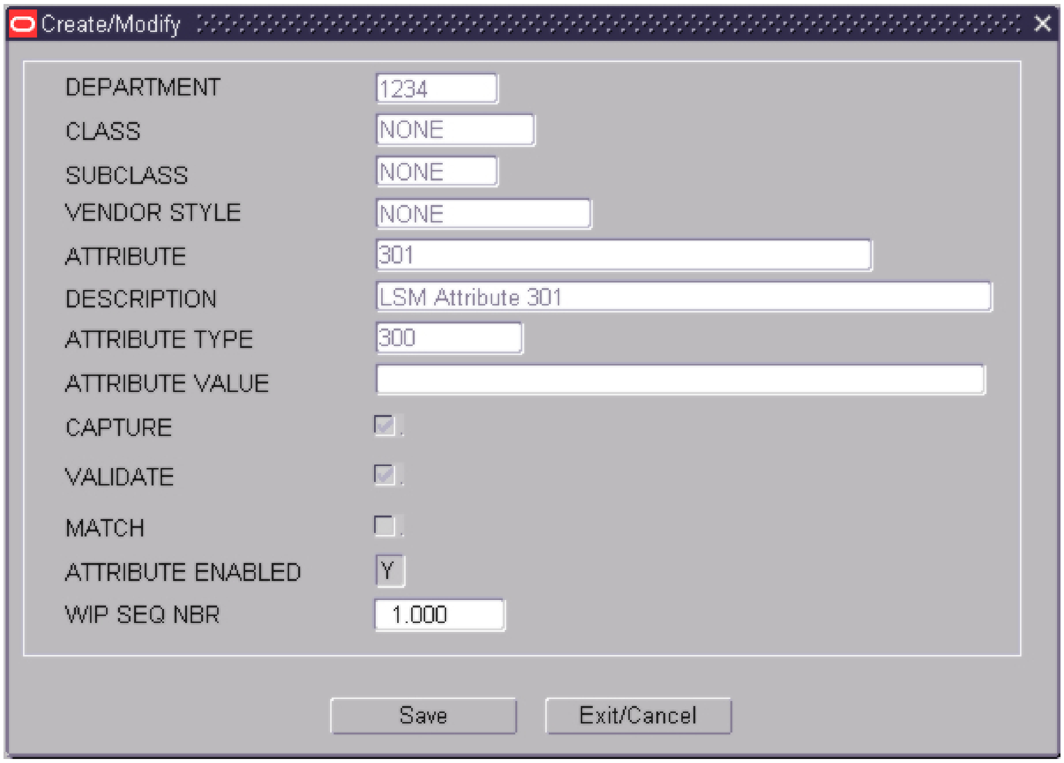
Display item defaults for the desired merchandise level. Click **Attribute Default**. The current item attribute defaults appear on the Attribute Default Editor window.




**Attribute Default Editor Window**

### Edit Item Attribute Defaults

1. On the Attribute Default Editor window, double-click the item attribute that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the WIP sequence as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Assign Item Attribute Defaults

1. On the Attribute Default Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Attribute field, enter the ID of the item attribute that you want to associate with the current merchandise level, or click the LOV  button and select the attribute.
3. In the WIP Seq Nbr field, enter the sequence number that indicates in what order the item attribute should be processed.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete Item Attribute Defaults

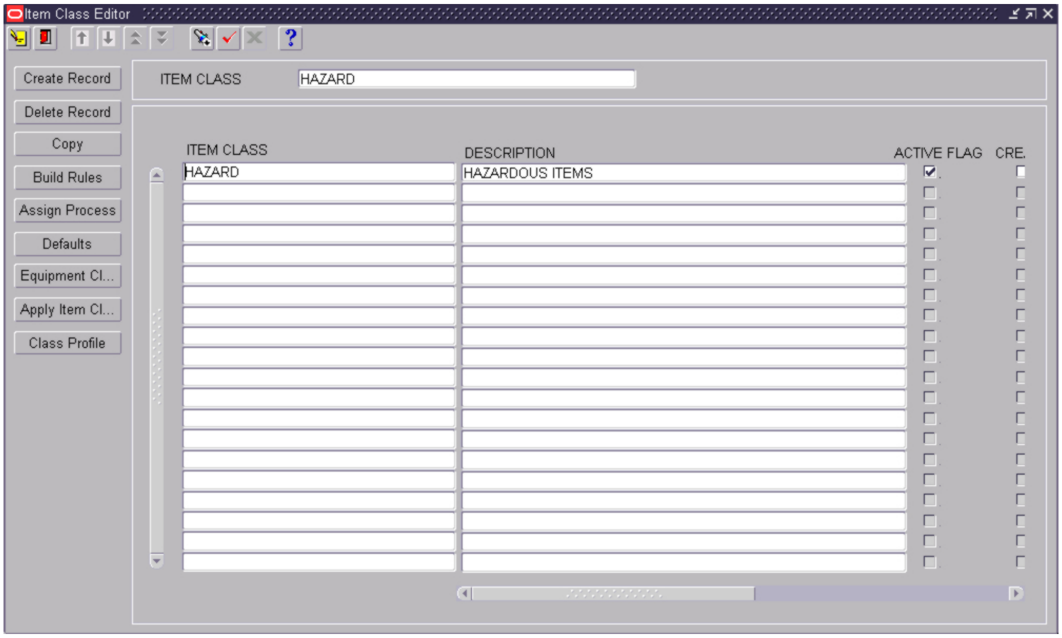
1. On the Attribute Default Editor window, select the item attribute that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Attribute Default Editor Window

- Click the exit  button to close the window.

# Maintain Item Classes

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Class Editor. The Item Class Editor window opens.




**Item Class Editor Window**

---

**Note:** This window is also accessible from the New Item Inquiry window.

---

## Display all Item Classes

- Click the execute query  button.

## Display an Item Class

1. If any item classes are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Item Class query field, enter the name of the item class, or click the LOV  button and select the item class.
4. Click the execute query  button. The item class that matches the search criterion opens.

### Edit an Item Class

1. On the Item Class Editor window, double-click the item class that you want to edit. The Create/Modify window opens.


**Create/Modify Window**

> **Note:** You can not edit an item class if the system indicator is selected.

2. Edit the description, priority, and active status of the item class as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.
4. Edit the following as necessary:
   - Build rules
   - Default characteristics and attributes
   - Processes
   - Equipment classes

### Add an Item Class

1. On the Item Class Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Item Class and Description fields, enter a name and description for the item class.
3. In the Priority field, enter the order in which the item class should be applied to an item when more than one item class may be applied.
4. To indicate whether the item class should be made available for use, select or clear the Active Flag check box.
5. Click **Save** to save any changes and close the Create/Modify window.
6. Set up the following as necessary:
   - Build rules
   - Default characteristics and attributes
   - Processes
   - Equipment classes

### Copy an Item Class

1. On the Item Class Editor window, select the item class that you want to copy.
2. Click **Copy**. The Copy Existing Item Class window opens.
3. In the New Item Class and New Description fields, enter an ID and description for the item class that you want to create.
4. Click **Save** to copy the selected item class and close the Copy Existing Item Class window.
5. Edit the following as necessary:
   - Build rules
   - Default characteristics and attributes
   - Processes
   - Equipment classes

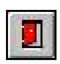
### Delete an Item Class

1. On the Item Class Editor window, select the item class that you want to delete.

   > **Note:** You can not delete an item class if the system indicator is selected or if any build rules, defaults, processes, or equipment classes have been assigned to the item class.

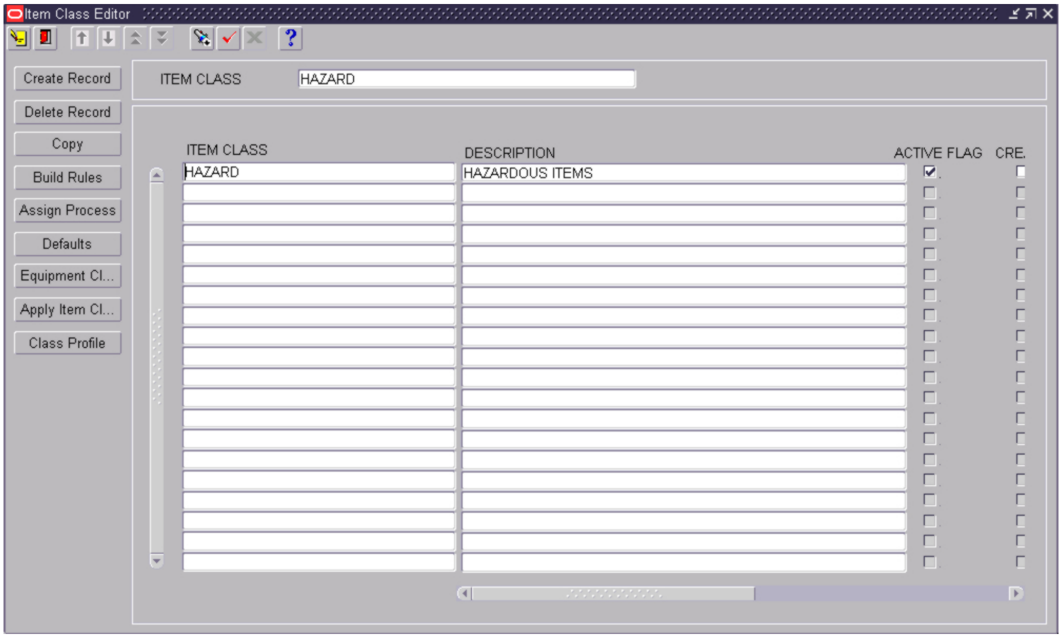
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Item Class Editor Window

- Click the exit  button to close the window.

## Build Item Class Rules

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Class Editor. The Item Class Editor window opens.




**Item Class Editor Window**

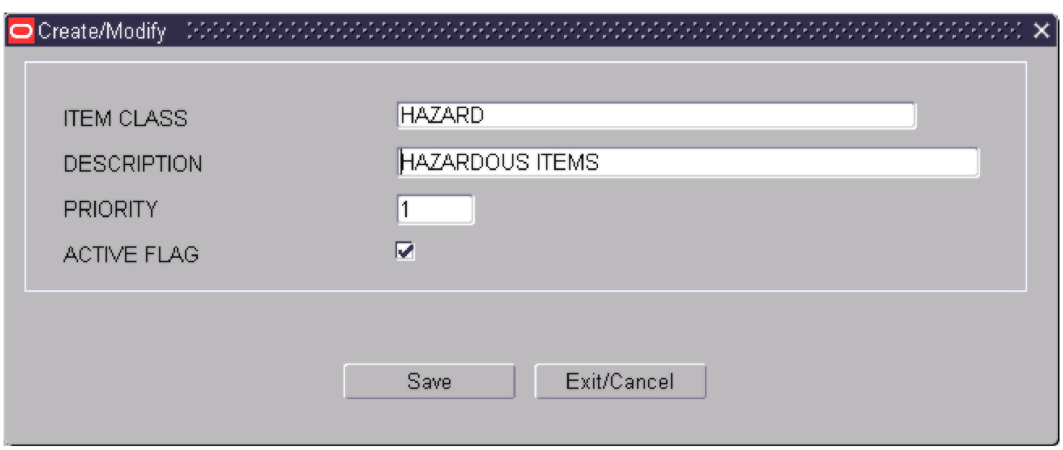
> **Note:** This window is also accessible from the New Item Inquiry window.

### Display All Item Classes

- Click the execute query  button.

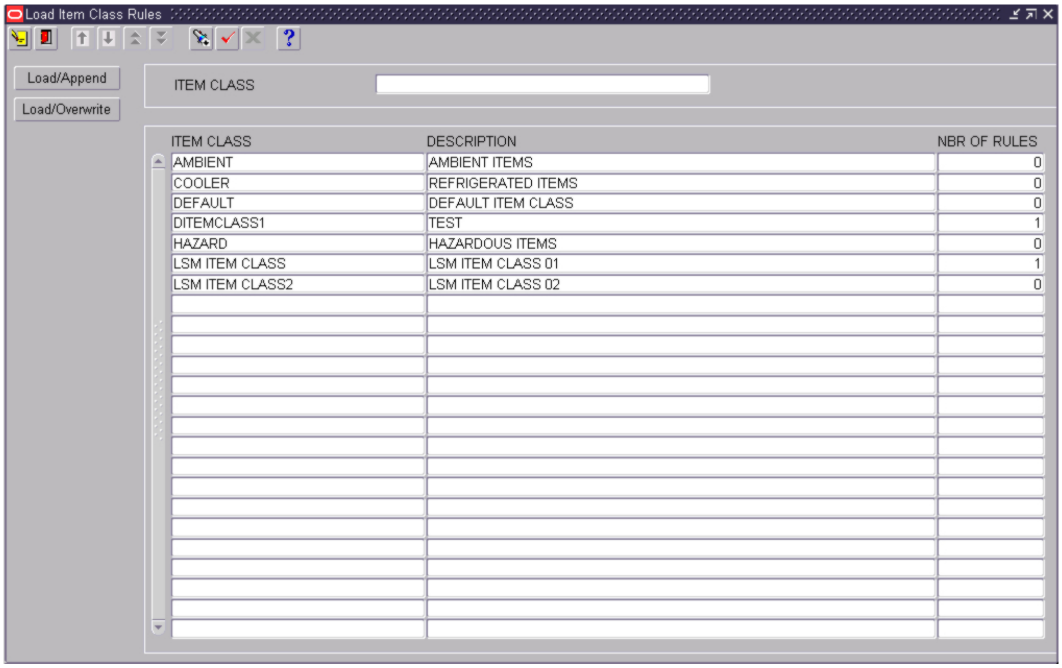
### Build Rules for an Item Class

1. On the Item Class Editor window, select the item class that you want to edit.
2. Click **Build Rules**. The Create/Modify window opens.




**Create/Modify Window**

3. Define the rules for selecting the members of the item class:
   a. In the Column fields, select the limiting factors.
   b. In the Operator fields, select the relational operators.
   c. In the Value fields, enter the values of the limiting factors.
4. [Optional] To copy the rules from another item class:
   a. On the Create/Modify window, click **Load**. The Load Item Class Rules window opens.




**Load Item Class Rules Window**

   b. Select the item class whose rules you want to copy.

> **Note:** To view the rules for an item class, double-click the desired item class. The rules appear in the Item Class Rules View Only window.

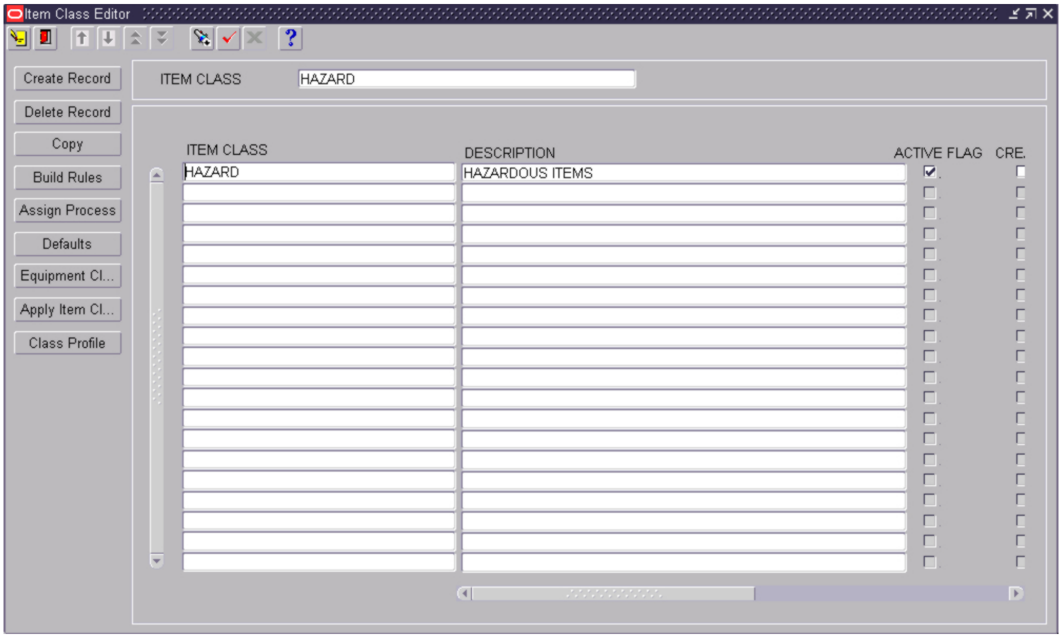
   c. Click **Load/Append** to add the rules to any existing rules, or click **Load/Overwrite** to replace any existing rules with the selected rules. You are returned to the Create/Modify window.
   d. If by appending the rules any duplicates occur, the Dup check box is selected next to the duplicate. Select the duplicate rule and click **Clear** to remove it.
5. Click **Save** to save the rules and close the Create/Modify window.

## Exit the Item Class Editor Window

- Click the exit  button to close the window.

## Assign Item Class Defaults

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Class Editor. The Item Class Editor window opens.




**Item Class Editor Window**

---

**Note:** This window is also accessible from the New Item Inquiry window.

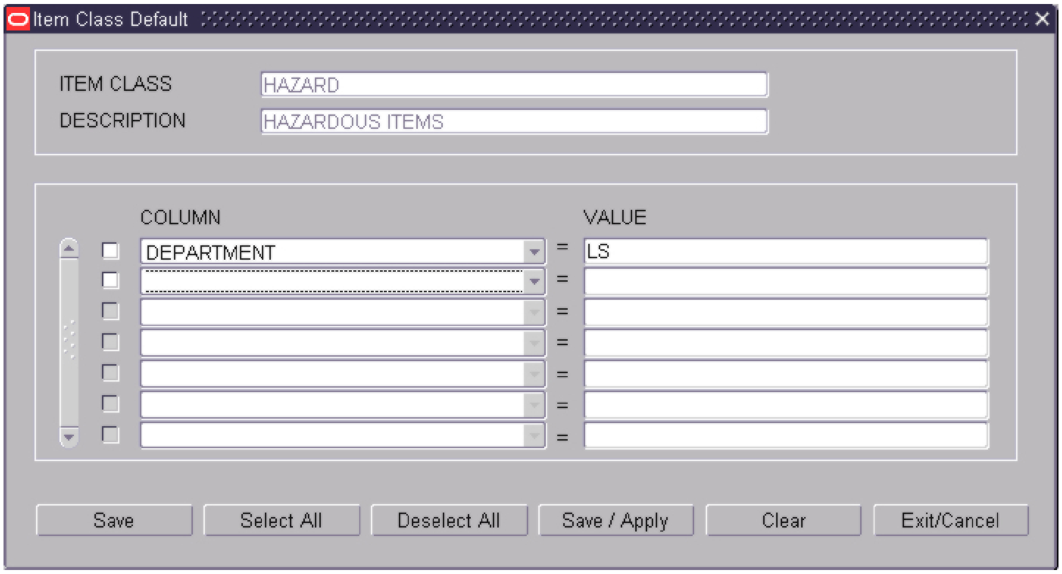
---

### Display All Item Classes

- Click the execute query  button.

### Assign Defaults

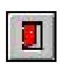
1. On the Item Class Editor window, select the item class that you want to edit.
2. Click **Defaults**. The Item Class Default window opens.




**Item Class Default Window**

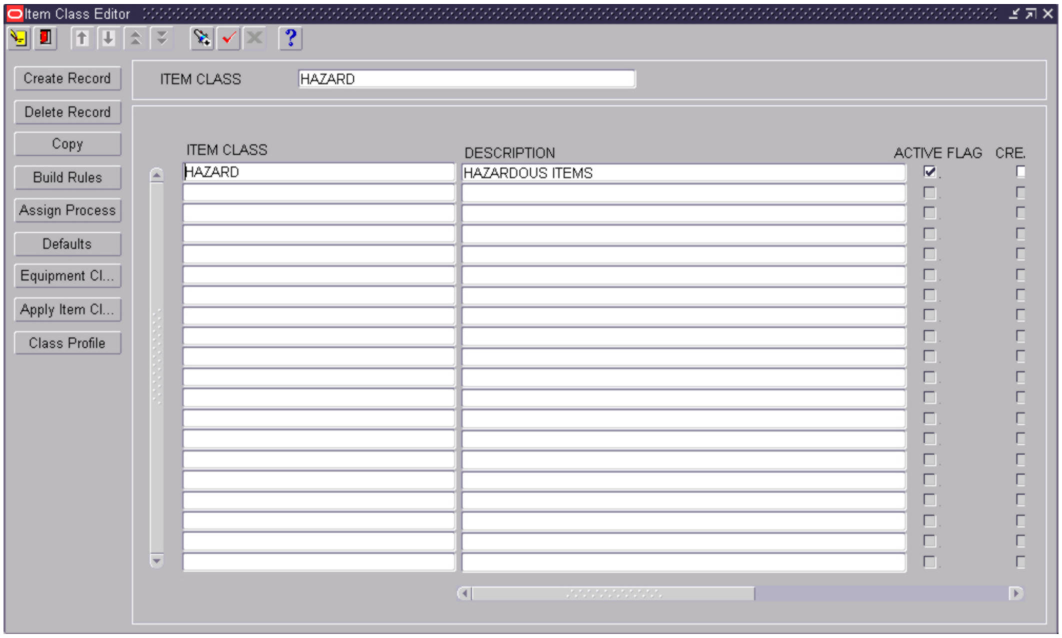
3. To add a default:
   a. In the Column field, select the desired characteristic from the drop-down list.
   b. In the Value field, enter the values of the characteristic.
4. To remove a default:
   a. Select the desired characteristic.
   b. Click **Clear**. The record is removed from the table.
5. [Optional] To apply the defaults to the items that are currently assigned to the item class, click **Save/Apply**.
6. Click **Save** to save the defaults and close the Item Class Default window.

### Exit the Item Class Editor Window

- Click the exit  button to close the window.

# Assign Item Class Processes

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Class Editor. The Item Class Editor window opens.




**Item Class Editor Window**

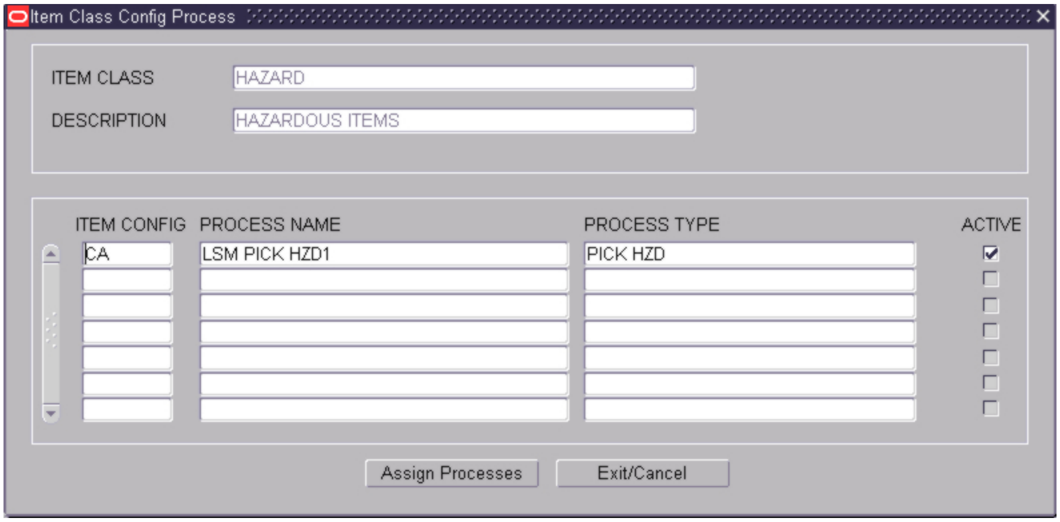
> **Note:** This window is also accessible from the New Item Inquiry window.

## Display All Item Classes

- Click the execute query  button.

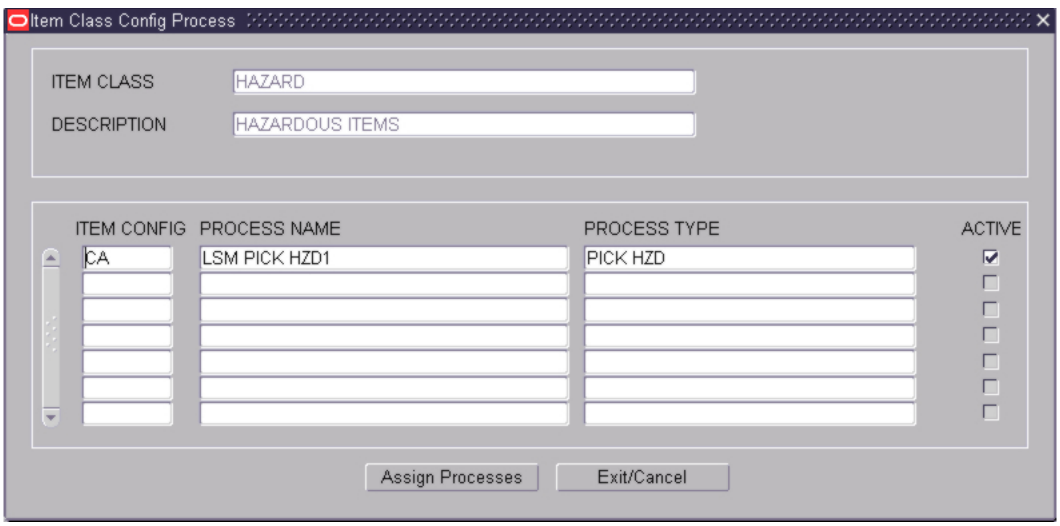
## Assign Processes

1. On the Item Class Editor window, select the item class that you want to edit.
2. Click **Assign Process**. The current assignments appear on the Item Class Config Process window.




**Item Class Config Process Window**

3. Click **Assign Processes**. The Assign Item Class Config Processes window opens.




**Assign Item Class Config Processes Window**

4. In the Item Config field, enter the ID of the item configuration that you want to edit, or click the LOV  button and select the item configuration. The available processes appear.
5. [Optional] To filter the processes listed in the Available Processes table, enter the name of a process type in the Process Type field, or click the LOV  button and select the process type.
6. To assign processes:
   a. Select the check box next to the desired processes on the Available Processes table.
   b. Click **Assign**. The selected processes are moved to the Assigned Processes table.

7. To remove assigned processes:
   a. Select the check box next to the desired processes on the Assigned Processes table.
   b. Click **Unassign**. The selected processes are moved to the Available Processes table.
8. To make the assigned processes available to users, select the Active check box next to the appropriate processes.
9. [Optional] To apply the processes to all items that are currently assigned to the item class, click **Save/Apply**.
10. Click **Save** to save any changes and close the Assign Item Class Config Processes window.
11. Click **Exit/Cancel** to close the Item Class Config Process window.

**Note:** In the Assign Item Class Config Processes window, you can:

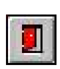
1) Click **Assign All** to move all processes to the Assigned Processes table or

2) Click **Unassign All** to move all processes to the Available Processes table. All processes are moved whether or not the check boxes are selected.

### Resequence the Processes

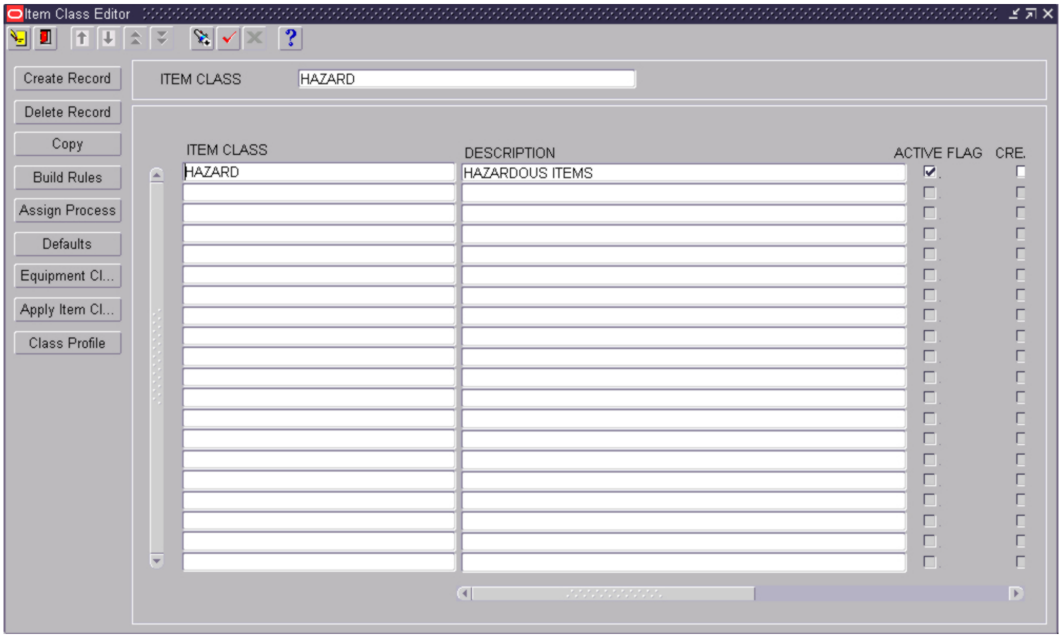
1. On the Item Class Editor window, select the item class that you want to edit.
2. Click **Assign Process**. The current assignments appear on the Item Class Config Process window.
3. Click **Assign Processes**. The Assign Item Class Config Processes window opens.
4. In the Item Config field, enter the ID of the item configuration that you want to edit, or click the LOV  button and select the item configuration. The available and assigned processes appear.
5. To resequence the assigned processes:
   a. Select the process to be moved.
   b. To move the process closer to the top of the list, click **Move Up**.
   c. To move the process closer to the bottom of the list, click **Move Down**.
6. Click **Save** to save any changes and close the Assign Item Class Config Processes window.
7. Click **Exit/Cancel** to close the Item Class Config Process window.

### Exit the Item Class Editor Window

- Click the exit  button to close the window.

## Assign Item Class Equipment Classes

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Class Editor. The Item Class Editor window opens.




**Item Class Editor Window**

---

**Note:** This window is also accessible from the New Item Inquiry window.

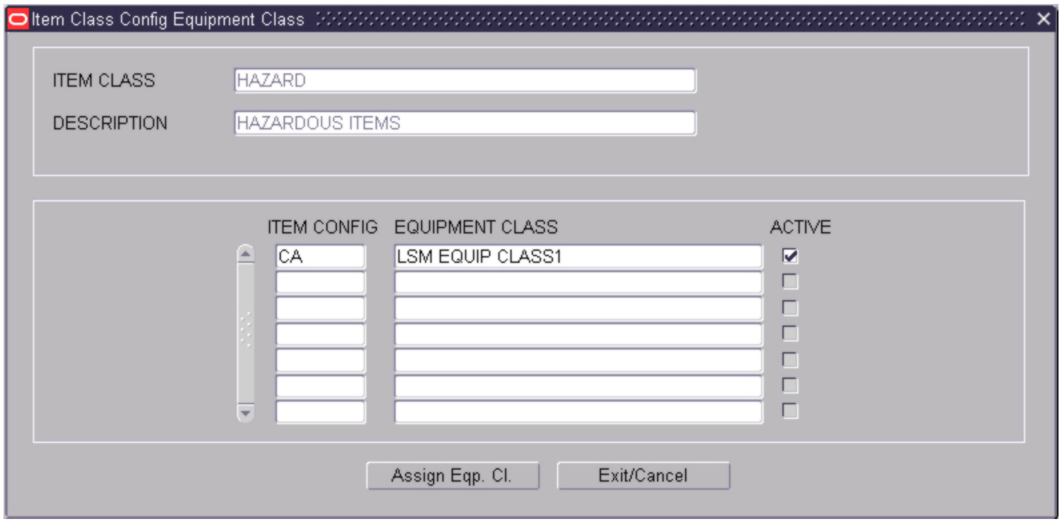
---

### Display All Item Classes

- Click the execute query  button.

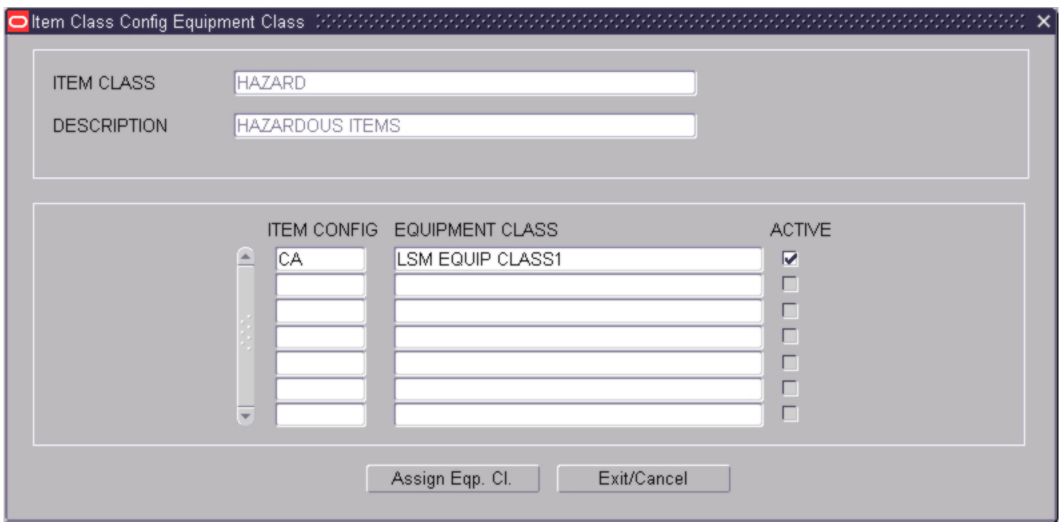
### Assign Equipment Classes

1. On the Item Class Editor window, select the item class that you want to edit.
2. Click **Equipment Cl**. The current assignments appear on the Item Class Config Equipment Class window.




**Item Class Config Equipment Class Window**

3. Click **Assign Eqp Cl**. The Assign Item Class Config Equipment Class window opens.



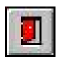

**Assign Item Class Config Equipment Class Window**

4. In the Item Config field, enter the ID of the item configuration that you want to edit, or click the LOV  button and select the item configuration. The available equipment classes appear.
5. To assign equipment classes:
   a. Select the check box next to the desired equipment classes on the Available Equip Classes table.
   b. Click **Assign**. The selected equipment classes are moved to the Assigned Equip Classes table.
6. To remove assigned equipment classes:
   a. Select the check box next to the desired equipment classes on the Assigned Equip Classes table.
   b. Click **Unassign**. The selected equipment classes are moved to the Available Equip Class table.

7. To make the assigned equipment classes available to users, select the Active check box next to the appropriate equipment classes.
8. [Optional] To apply the equipment classes to all items that are currently assigned to the item class, click **Save/Apply**.
9. Click **Save** to save any changes and close the Assign Item Class Config Equipment Class window.
10. Click **Exit/Cancel** to close the Item Class Config Equipment Class window.

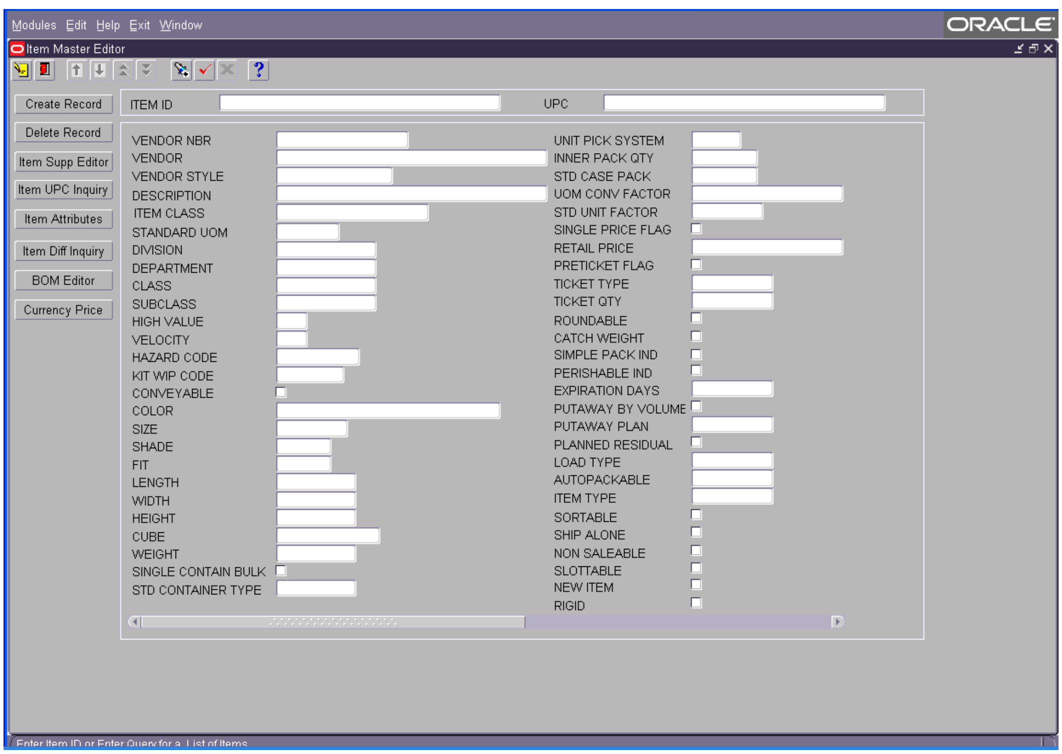
> **Note:** In the Assign Item Class Config Equipment Class window, you can:
>
> 1) Click **Assign All** to move all equipment classes to the Assigned Equip Classes table or
>
> 2) Click **Unassign All** to move all equipment classes to the Available Equip Classes table. All equipment classes are moved whether or not the check boxes are selected.

### Exit the Item Class Editor Window

- Click the exit  button to close the window.

## Maintain Items

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Master Editor. The Item Master Editor window opens.




**Item Master Editor Window**

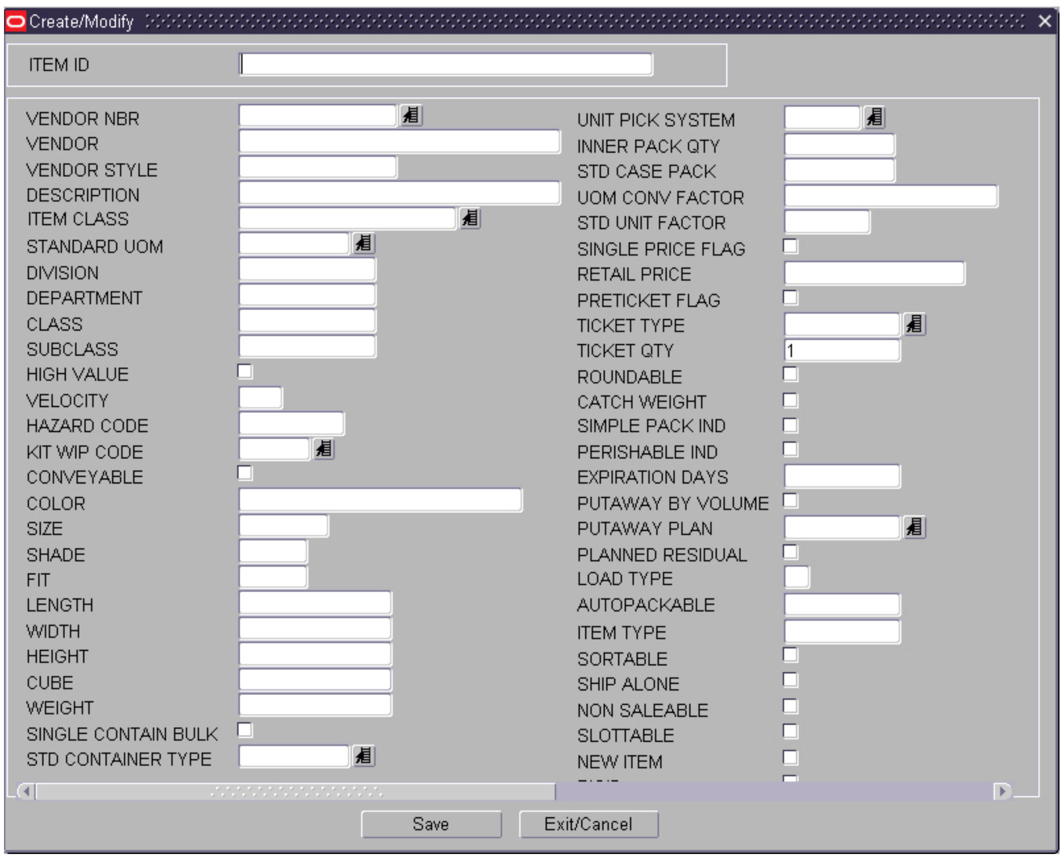
> **Note:** You can also access this window from the Quality Assurance window.

## Display an Item

1. If an item is currently displayed, click the clear  button.
2. Click the enter query  button.
3. To search for an item by:
   - Item ID: In the Item ID query field, enter the ID of the item, or click the LOV  button and select the item.
   - UPC: In the UPC query field, enter the item's UPC, the LOV  button and select the item.
4. Click the execute query  button. The details for the selected item appear.

## Edit an Item

1. On the Item Master Editor window, double-click any of the detail fields. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add an Item

1. On the Item Master Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Item ID field, enter the ID of the item.
3. Enter the following required information:
   a. In the Vendor Nbr field, enter the vendor number, of click the LOV button and select the vendor.
   b. In the Description field, enter a description of the item.
   c. In the Standard UOM field, enter the standard unit of measure, or click the LOV button and select the standard UOM.
   d. In the Unit Pick System field, enter the code for the unit pick system or click the LOV button and select the unit pick system.
   e. In the Distribution Method field, indicate how merchandise is to be handled for distribution.
   f. In the Replen Dist Method field, indicate how merchandise is to be replenished.
4. Enter any additional details as necessary.
5. Click **Save** to save the changes and close the Create/Modify window.

### Delete an Item

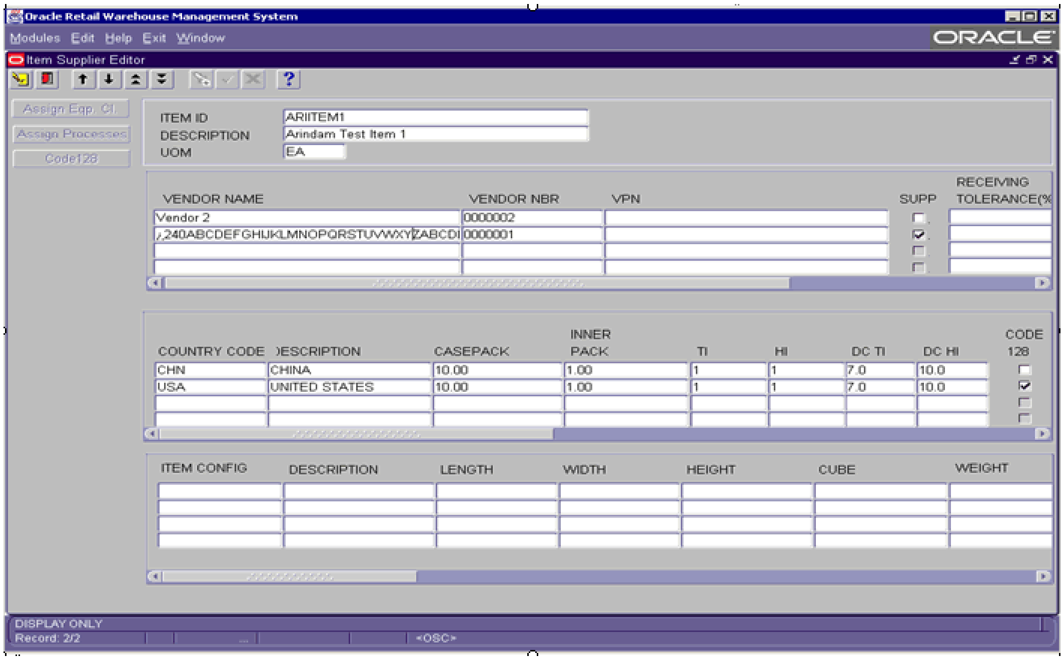
1. On the Item Master Editor window, click **Delete Record**.
2. When prompted to delete the record, click **Yes**.

### Exit the Item Master Editor Window

- Click the exit button to close the window.

## Maintain Item Supplier Details

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Supplier Editor. The Item Supplier Editor window opens.




**Item Supplier Editor Window**

> **Note:** You can also access this window from the Item Master Editor window and the Item Master Inquiry window.

### Display the Suppliers of an Item

1. If the suppliers of an item are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Item ID query field, enter the item ID, or click the LOV  button and select an item.
4. Click the execute query  button. The suppliers of the selected item appear.

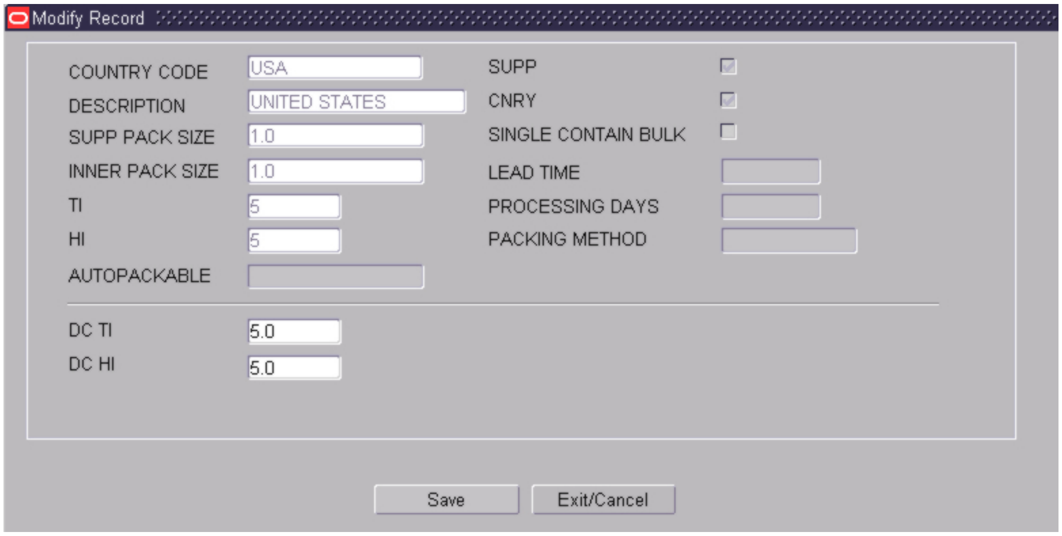
### View Origin Countries and Item Configurations

> **Note:** There are three tables on this window. They are referred to as the Vendor table, Origin Country table, and Item Configuration table.

1. On the Item Supplier Editor window, select a vendor. The origin countries for the item/vendor appear in the Origin Country table.
2. Select an origin country. The item configurations for the item/vendor/origin country appear in the Item Configuration table.

## Edit Tier and Height Measurements

1. On the Item Supplier Editor window, double-click the origin country that you want to edit. The Modify Record window opens.

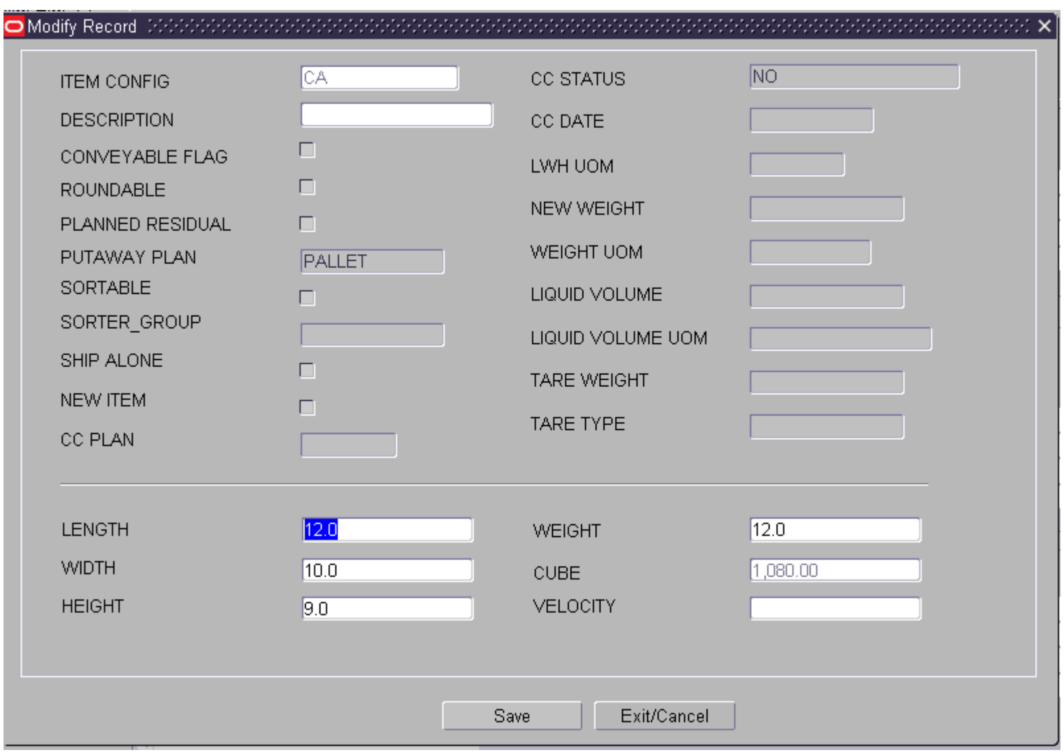



**Modify Record Window**

2. Edit the DC TI and DC HI fields as necessary.
3. Click **Save** to save the changes and close the Modify Record window.

## Edit an Item Configuration

1. On the Item Supplier Editor window, double-click the item configuration that you want to edit. The Modify Record window opens.

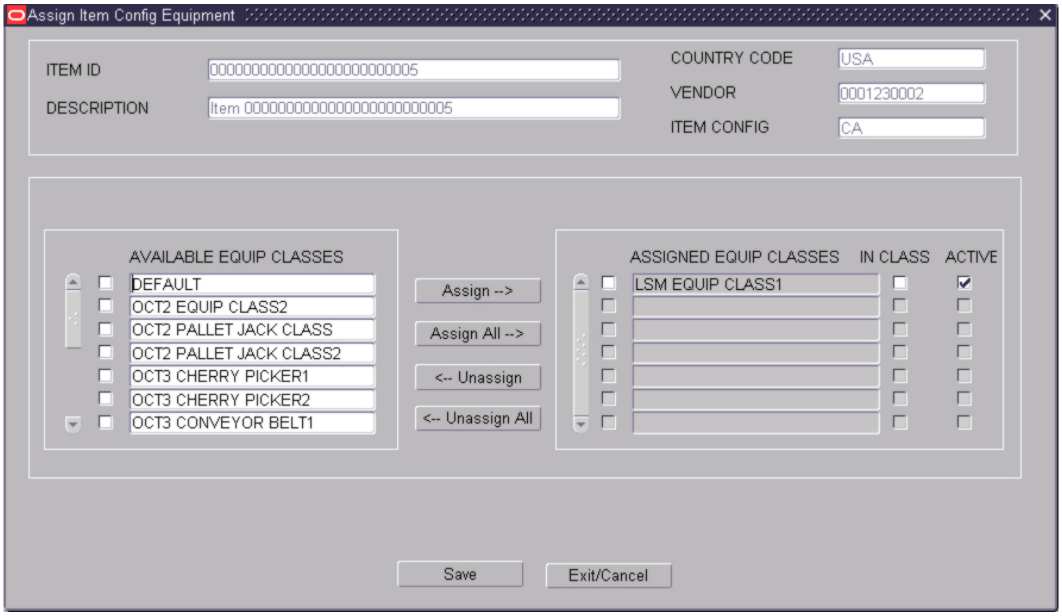



**Modify Record Window**

2. Edit the dimensions, weight, and velocity as necessary.
3. Click **Save** to save the changes and close the Modify Record window.

### Assign Equipment Classes

1. On the Item Supplier Editor window, select the item configuration that you want to edit.
2. Click **Assign Eqp Cl**. The Assign Item Config Equipment window opens.



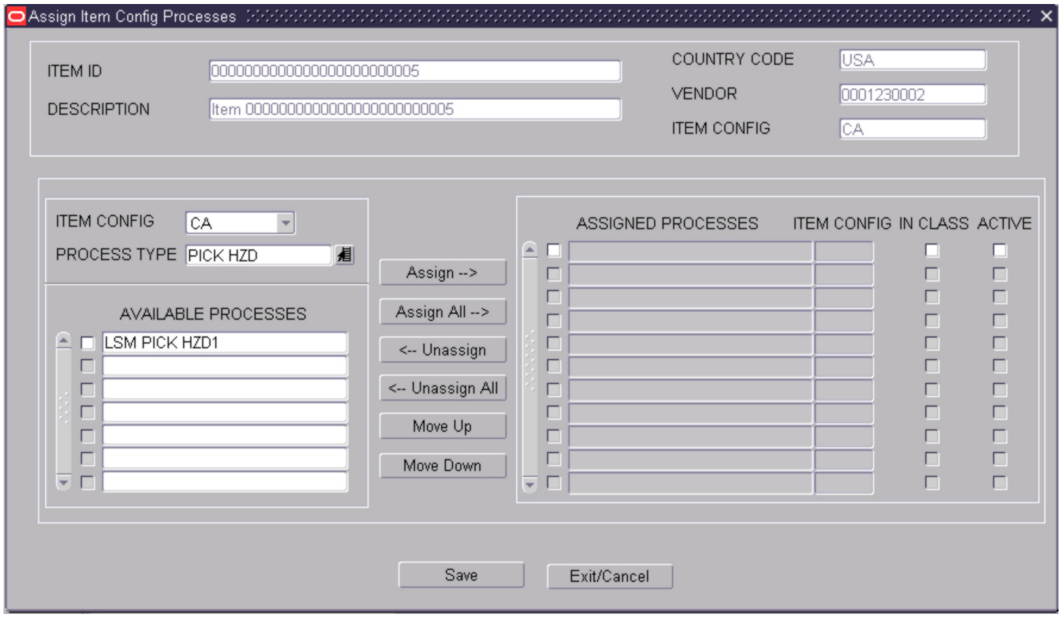

**Assign Item Config Equipment Window**

3. To assign equipment classes:
   a. Select the check box next to the desired equipment classes on the Available Equip Classes table.
   b. Click **Assign**. The selected equipment classes are moved to the Assigned Equip Classes table.
4. To remove assigned equipment classes:
   a. Select the check box next to the desired equipment classes on the Assigned Equip Classes table.
   b. Click **Unassign**. The selected equipment classes are moved to the Available Equip Class table.
5. To make the assigned equipment classes available to users, select the Active check box next to the appropriate equipment classes.
6. Click **Save** to save any changes and close the Assign Item Config Equipment window.

**Note:** In the Assign Item Config Equipment window, you can 1) click **Assign All** to move all equipment classes to the Assigned Equip Classes table or 2) click **Unassign All** to move all equipment classes to the Available Equip Classes table. All equipment classes are moved whether or not the check boxes are selected.

## Assign Processes

1. On the Item Supplier Editor window, select the item configuration that you want to edit.
2. Click **Assign Processes**. The Assign Item Config Processes window opens.




**Assign Item Config Processes Window**

3. [Optional] To filter the processes listed in the Available Processes table, enter the name of a process type in the Process Type field, or click the LOV  button and select the process type.
4. To assign processes:
   a. Select the check box next to the desired processes on the Available Processes table.
   b. Click **Assign**. The selected processes are moved to the Assigned Processes table.
5. To remove assigned processes:
   a. Select the check box next to the desired processes on the Assigned Processes table.
   b. Click **Unassign**. The selected processes are moved to the Available Processes table.
6. To make the assigned processes available to users, select the Active check box next to the appropriate processes.
7. To assign processes for another item configuration, select the desired item configuration from the Item Config drop-down list. Repeat the previous steps.
8. Click **Save** to save any changes and close the Assign Item Config Processes window.

> **Note:** In the Assign Item Config Processes window, you can 1) click **Assign All** to move all processes to the Assigned Processes table or 2) click **Unassign All** to move all processes to the Available Processes table. All processes are moved whether or not the check boxes are selected.

### Resequence the Processes

1. On the Item Supplier Editor window, select the item configuration that you want to edit.
2. Click **Assign Processes**. The Assign Item Config Processes window opens.
3. To resequence the assigned processes:
   a. Select the process to be moved.
   b. To move the process closer to the top of the list, click **Move Up**.
   c. To move the process closer to the bottom of the list, click **Move Down**.
4. Click **Save** to save any changes and close the Assign Item Config Processes window.

### Assign Code 128

1. On the Item Supplier Editor window, select the item configuration that you want to edit.
2. Click **Code 128**. The Assign Code128 Identifier window opens.
3. To assign processes:
   a. Select the check box next to the desired AI on the Available table.
   b. Click **Assign**. The selected processes are moved to the Assigned AI table.
4. To remove assigned processes:
   a. Select the check box next to the desired AI on the Assigned AI table.
   b. Click **Unassign**. The selected processes are moved to the Available AI table.
5. Click **Save** to save any changes and close the Assign Item Config Processes window.

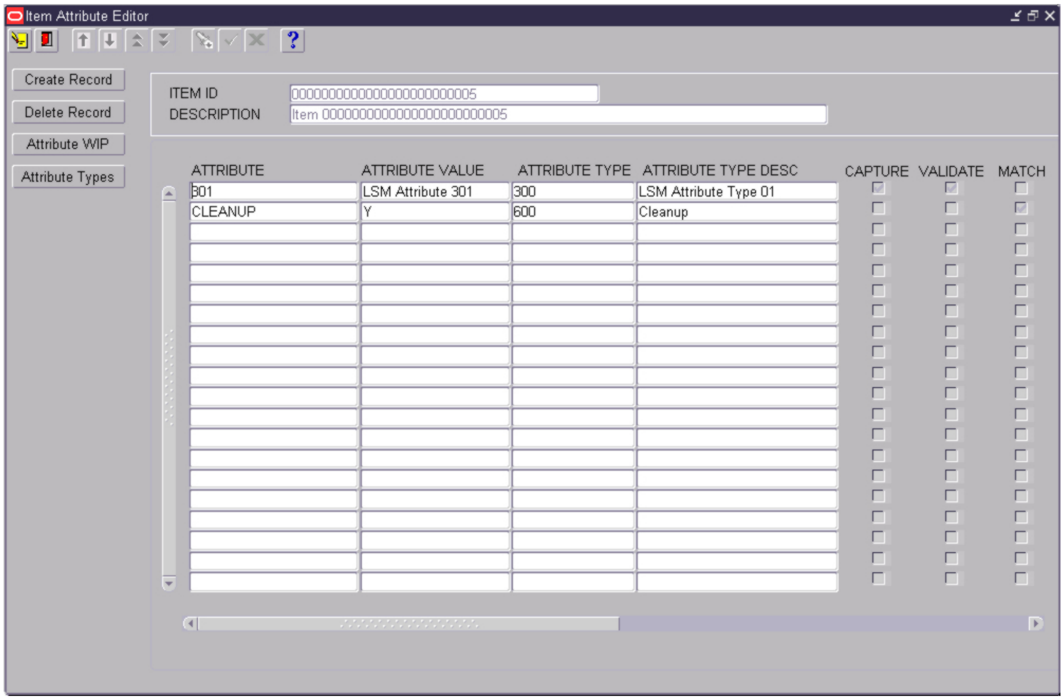
> **Note:** In the Assign Code128 Identifier window, you can 1) click **Assign All** to move all processes to the Assigned AI table or 2) click **Unassign All** to move all processes to the Available AI table. All identifiers are moved whether or not the check boxes are selected.

### Exit the Item Supplier Editor Window

- Click the exit  button to close the window.

## Maintain Item Attributes

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Attributes Editor. The Item Attribute Editor window opens.




**Item Attribute Editor Window**

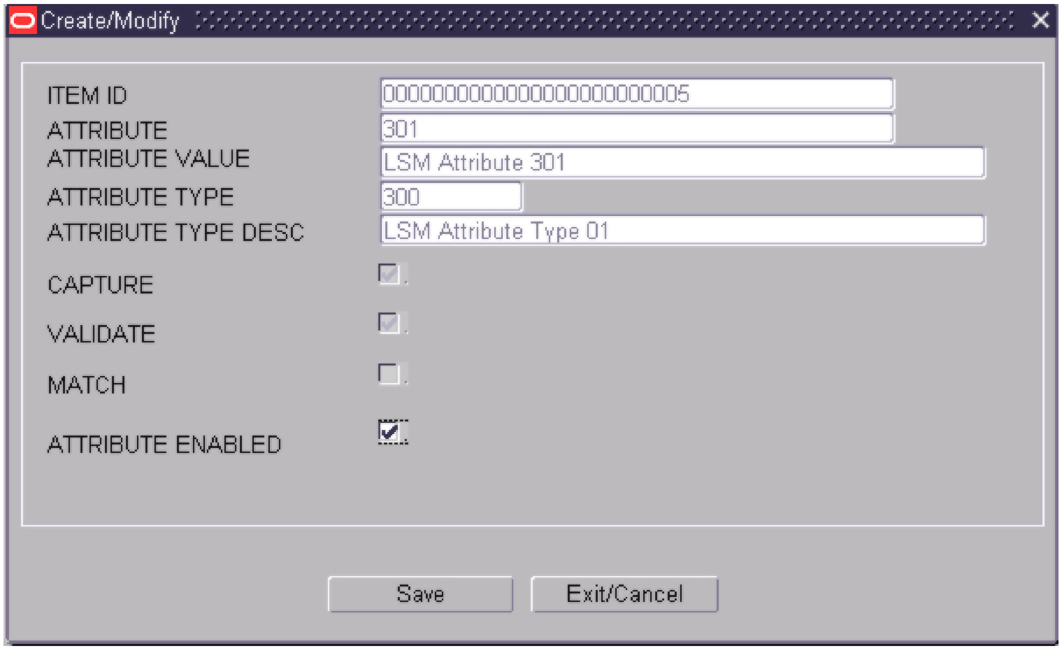
**Note:** You can also access this window from the following windows: Item Master Editor, Item Master Inquiry, and Quality Assurance.

### Display Item Attributes

1. If attributes for an item are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Item ID query field, enter the item ID, or click the LOV  button and select an item.
4. Click the execute query  button. The attributes assigned to the selected item appear.

### Edit an Item Attribute

1. On the Item Attribute Editor window, double-click the item attribute that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Select or clear the Attribute Enabled check box as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Assign an Attribute to an Item

1. On the Item Attribute Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Attribute field, enter the ID of the attribute that you want to associate with the current item, or click the LOV button and select the attribute.

> **Note:** If no item was identified on the Item Attribute Editor window, enter the ID of the item in the Item ID field on the Create/Modify window.

3. To make the item attribute available to users, select the Attribute Enabled check box.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete an Item Attribute

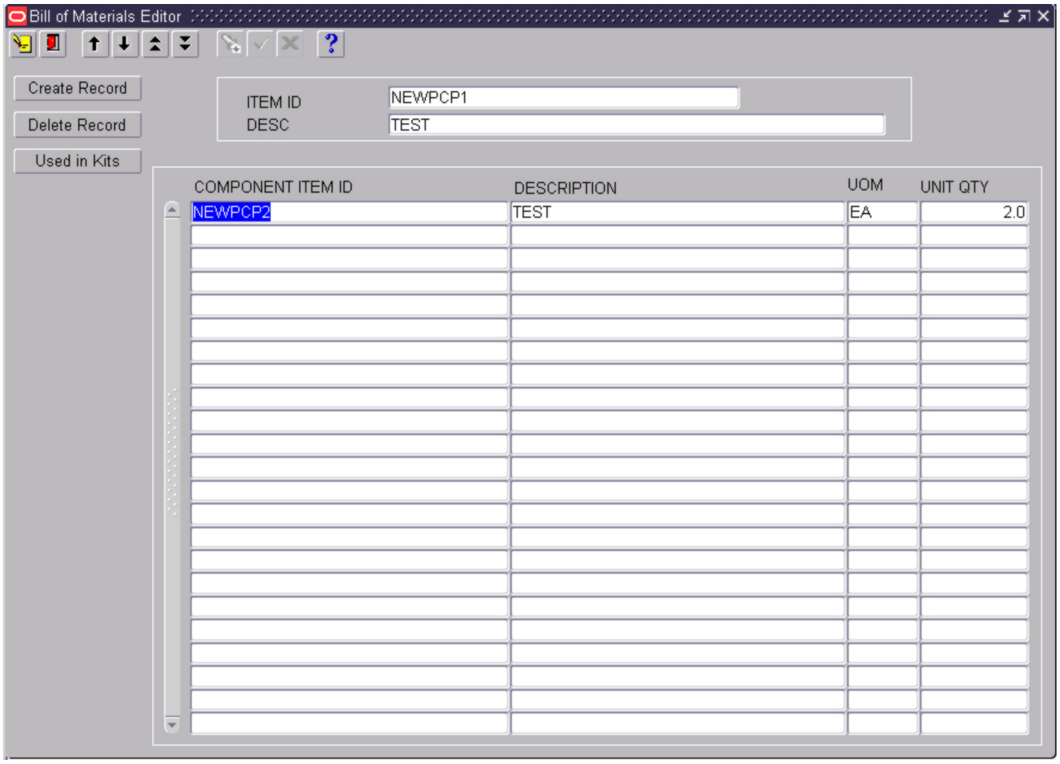
1. On the Item Attribute Editor window, select the attribute that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Item Attribute Editor Window

- Click the exit button to close the window.

## Maintain Kits

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Bill of Materials Editor. The Bill of Materials Editor window opens.




**Bill of Materials Editor Window**

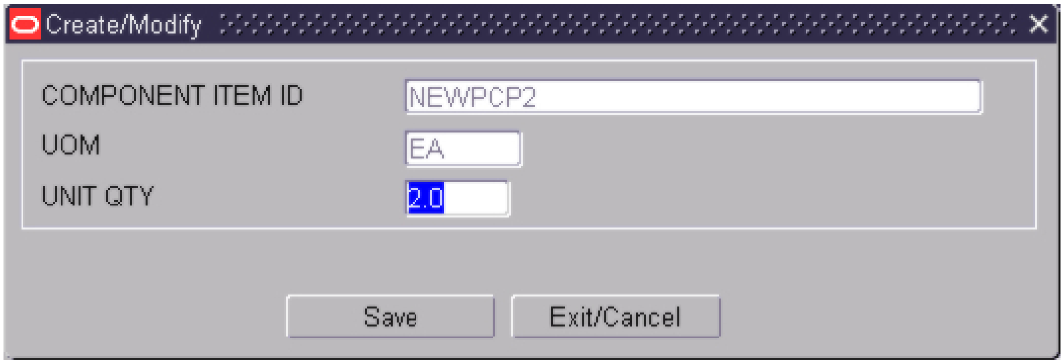
> **Note:** You can also access this window from the Item Master Editor window.

### Display Component Items

1. If an item is currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Item ID query field, enter the ID of the item, or click the LOV  button and select the item.
4. Click the execute query  button. The component items for the selected item are displayed.

## Edit a Component Item

1. On the Bill of Materials Editor window, double-click the component item that you want to edit. The Create/Modify window opens.

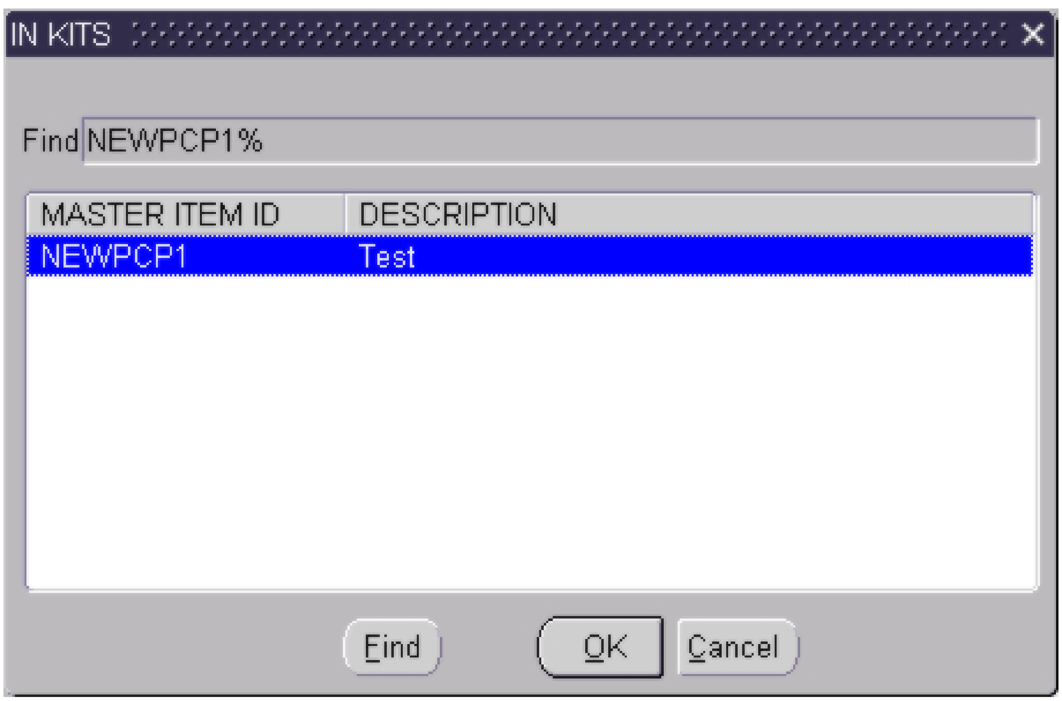



**Create/Modify Window**

2. Edit the unit quantity as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

## Check Kit Members

1. On the Bill of Materials Editor window, select the component item that you want to check.
2. Click **Used in Kits**. The kits of which the component item is a member appear in the In Kits window.




**In Kits Window**

3. Click OK to close the In Kits window.

## Add a Component Item

1. On the Bill of Materials Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Component Item ID field, enter the ID of the component item, or click the LOV button and select the component item.
3. In the Unit Qty field, enter the required number of units.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Component Item

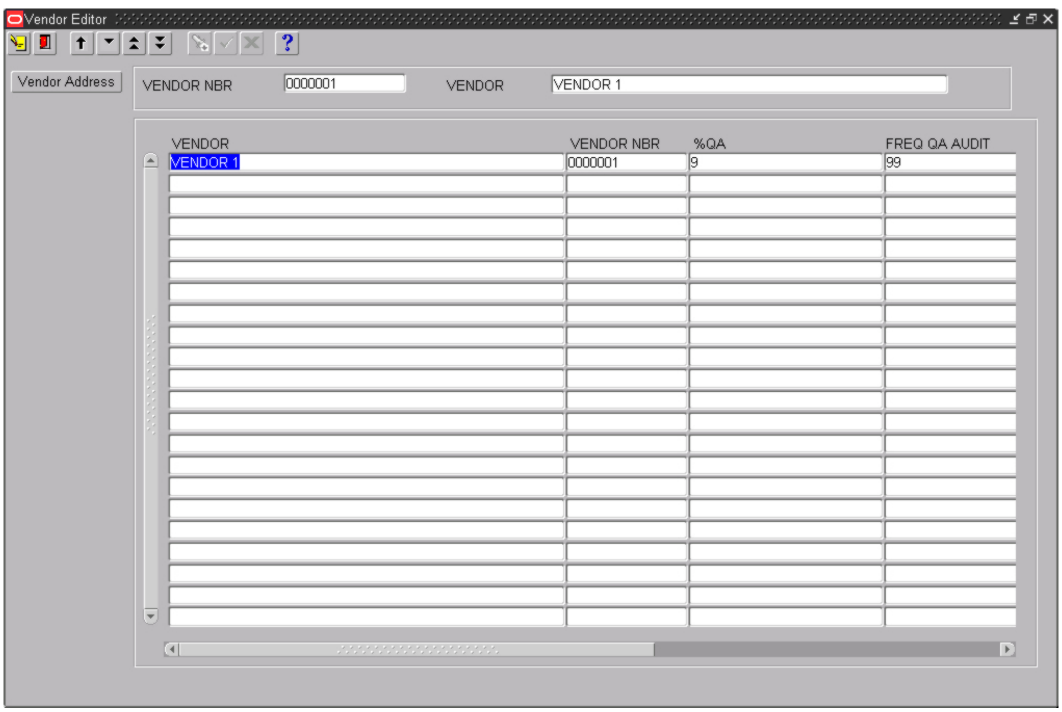
1. On the Bill of Materials Editor window, select the component item that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Bill of Materials Editor Window

- Click the exit button to close the window.

## Maintain Vendor Audits

**Navigate:** From the main menu, select Support Functions > Item Setup > Vendor Editor. The Vendor Editor window opens.




**Vendor Editor Window**

### Display All Vendors

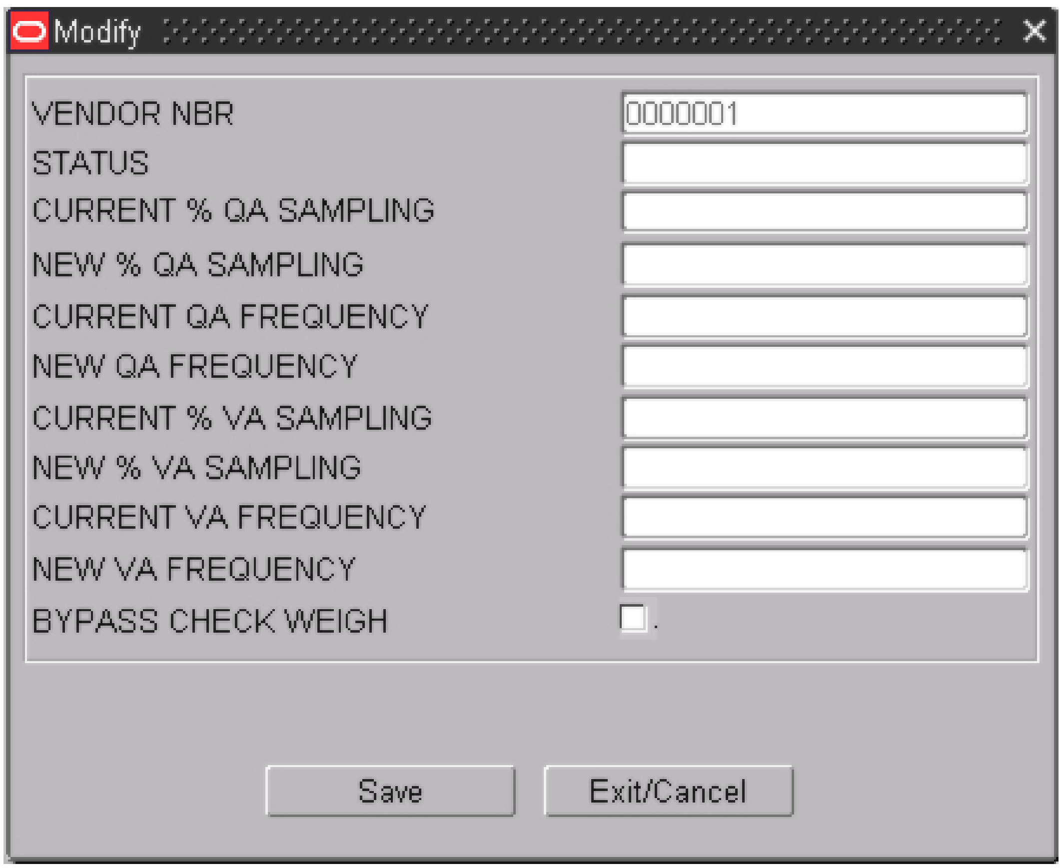
- Click the execute query button.

### Display One or Multiple Vendors

1. If any vendors are currently displayed, click the clear button.
2. Click the enter query button.
3. In the Vendor Nbr field, enter a full or partial vendor number, or click the LOV button and select the vendor.
4. Click the execute query button. The vendors that match the full or partial vendor number appear.

### Edit Vendor Audits

1. On the Vendor Editor window, double-click the vendor that you want to edit. The Modify window opens.



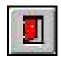

**Modify Window**

2. Enter sampling and frequency percentages in the appropriate fields.

   **Note:** Frequency indicates the percentage of shipments to be audited. Sampling indicates the percentage of each shipment to be audited.

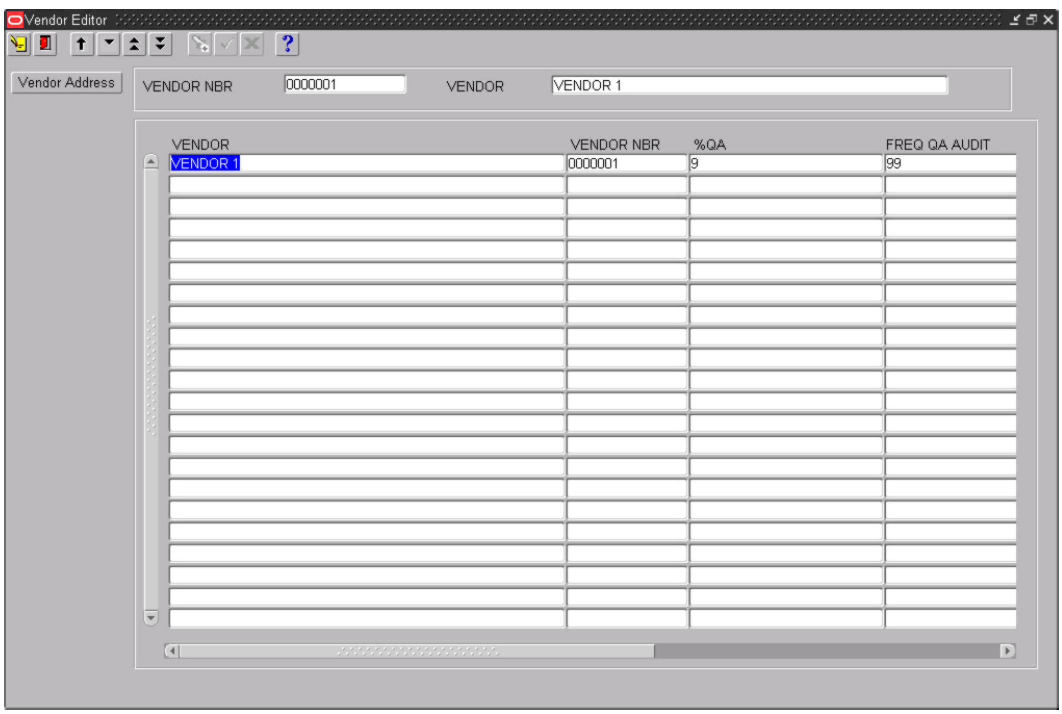
3. To bypass weighing containers from the vendor, select the Bypass Check Weigh check box as necessary.
4. Click **Save** to save the changes and close the Modify window.

### Exit the Vendor Editor Window

- Click the exit  button to close the window.

## View Vendor Addresses

**Navigate:** From the main menu, select Support Functions > Item Setup > Vendor Editor. The Vendor Editor window opens.




**Vendor Editor Window**

### Display All Vendors

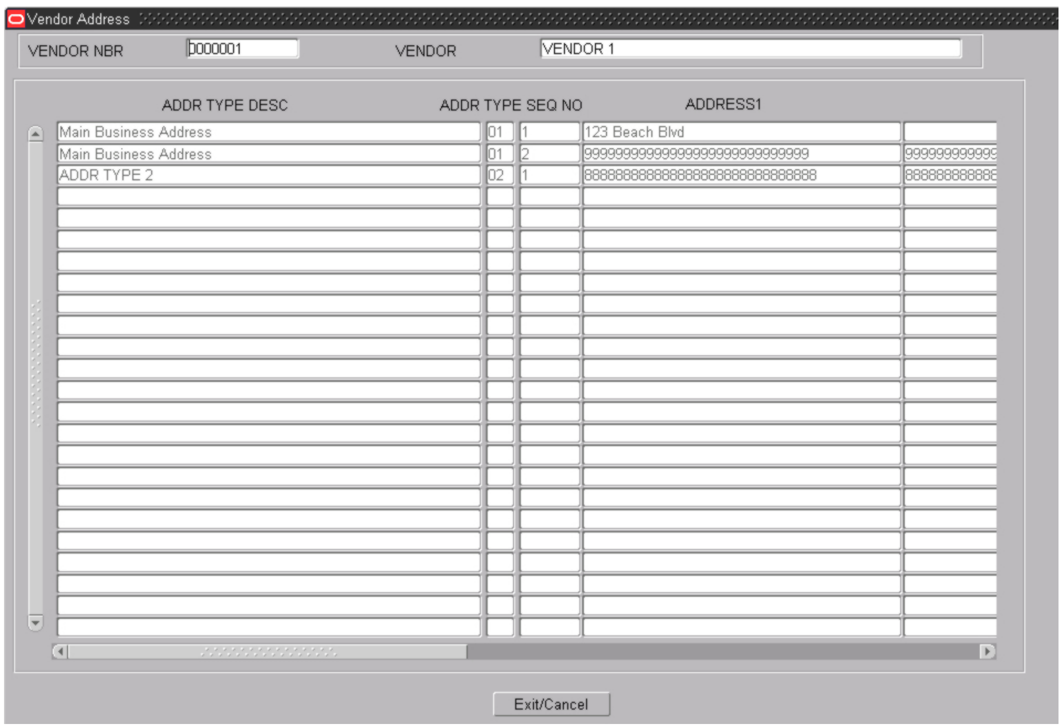
- Click the execute query  button.

### Display One or Multiple Vendors

1. If any vendors are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Vendor Nbr field, enter a full or partial vendor number, or click the LOV  button and select the vendor.
4. Click the execute query  button. The vendors that match the full or partial vendor number appear.

### View Addresses

1. On the Vendor Editor window, select the vendor that you want to view in detail.
2. Click **Vendor Address**. The vendor's addresses appear in the Vendor Address window.




**Vendor Address Window**

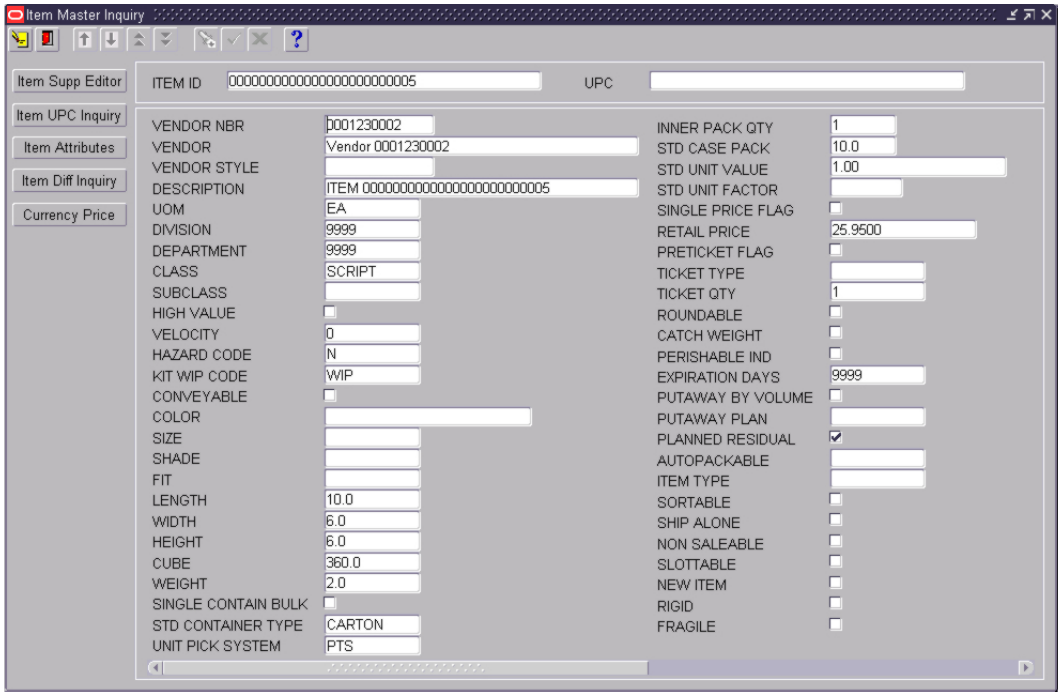
3. Click **Exit/Cancel** to close the Vendor Address window.

### Exit the Vendor Editor Window

- Click the exit  button to close the window.

## View Items

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Master Inquiry. The Item Master Inquiry window opens.




**Item Master Inquiry Window**

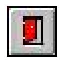
### Display an Item

1. If an item is currently displayed, click the clear  button.
2. Click the enter query  button.
3. To search for an item by:
   - Item ID: In the Item ID field, enter the ID of the item, or click the LOV  button and select the item.
   - UPC: In the UPC field, enter the item's UPC, the LOV  button and select the item.
4. Click the execute query  button. The details for the selected item appear.

### View Additional Details

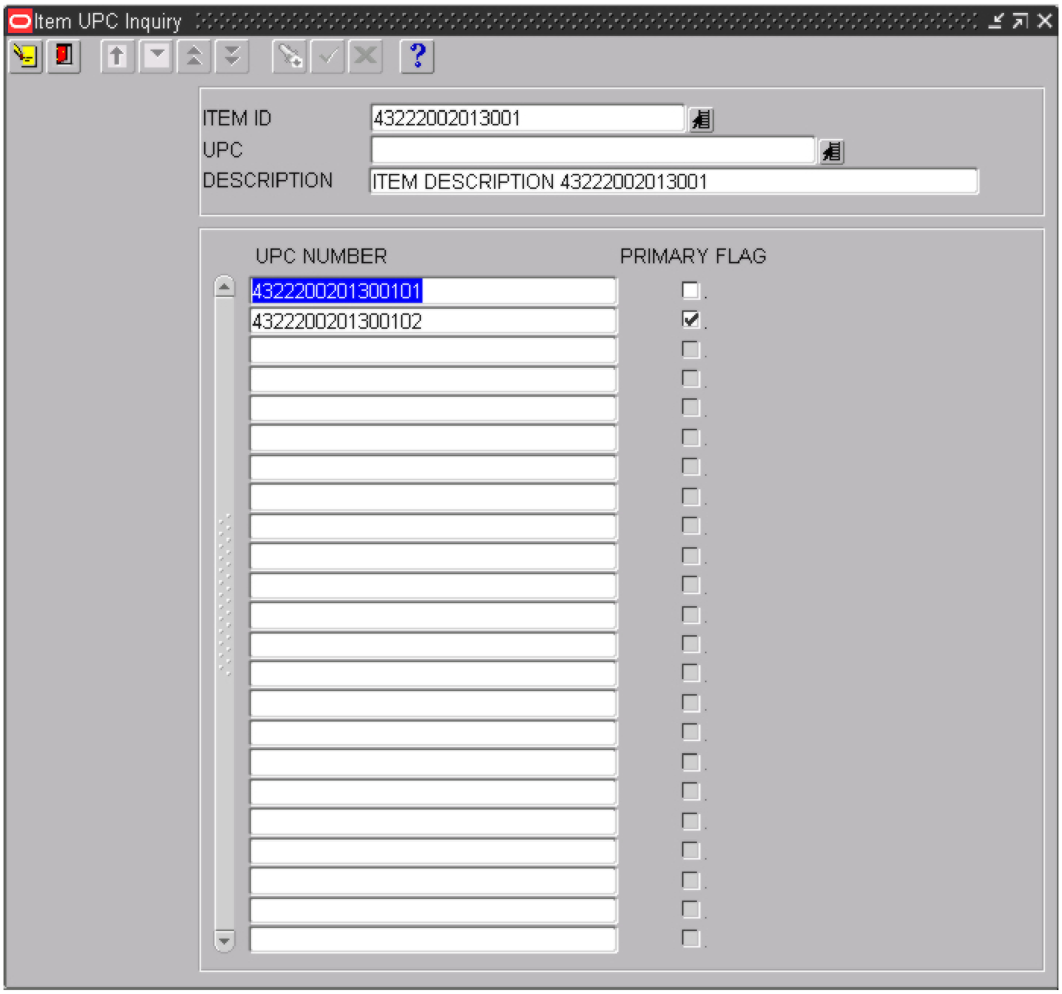
- To view the vendors, origin countries, configurations for the item, click **Item Supp Editor**. The Item Supplier Editor window opens. You can also view the equipment classes and processes that are assigned at the item configuration level.
- To view the universal product codes (UPC) for the item, click **Item UPC Inquiry**. The Item UPC Inquiry window opens.
- To view the attributes and attribute types for the item, click **Item Attributes**. The Item Attribute Editor window opens.
- To view the diff groups and diffs for the item, click **Item Diff Inquiry**. The Item Differentiator Inquiry window opens.
- To view retail prices in multiple currencies for the item, click **Currency Price**. The Multi Price Ticketing window opens.

### Exit the Item Master Inquiry Window

- Click the exit  button to close the window.

## View Item UPCs

**Navigate:** From the main menu, select Support Functions > Item Setup > UPC Inquiry. The Item UPC Inquiry window opens.




**Item UPC Inquiry Window**

> **Note:** You can also access this window from the Item Master Editor window and the Item Master Inquiry window.

### Display Item UPCs

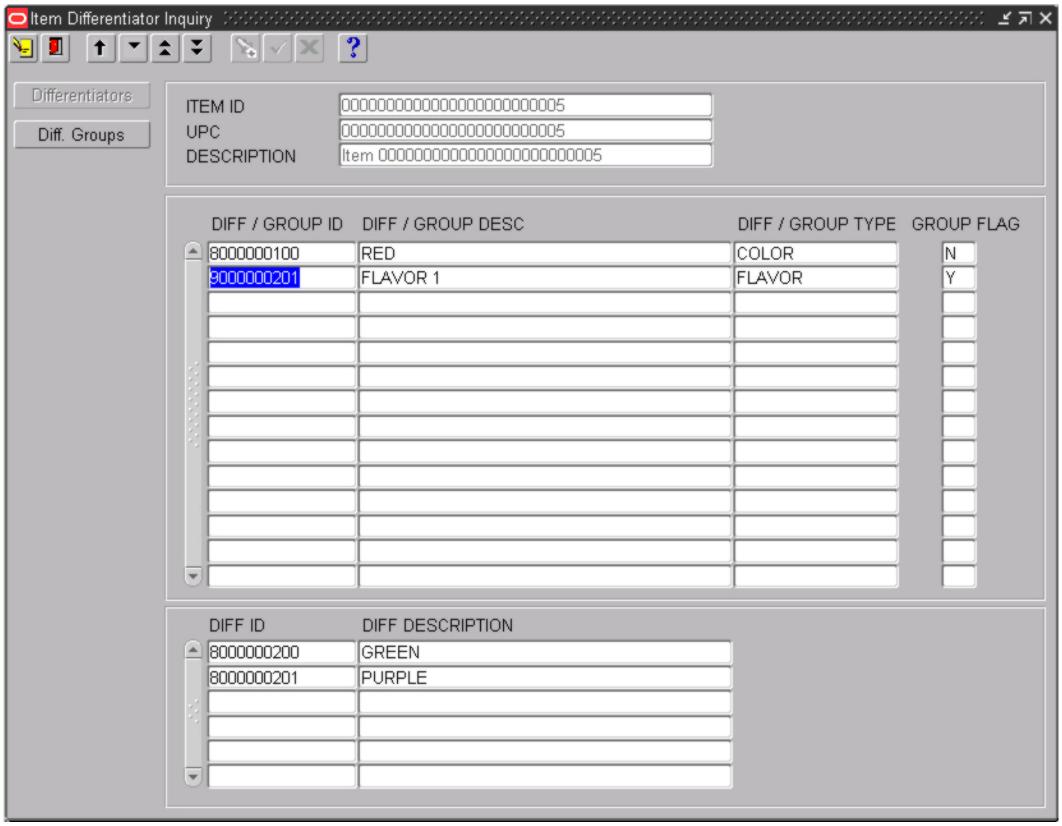
1. If an item is currently displayed, click the clear  button.
2. Click the enter query  button.
3. Enter an item ID or UPC in the appropriate query field, or click either LOV  button and select the item.
4. Click the execute query  button. The UPCs for the selected item appear.

### Exit the Item UPC Inquiry Window

- Click the exit button to close the window.

## View Item Diffs

**Navigate:** From the main menu, select Support Functions > Item Setup > Item Differentiator Inquiry. The Item Differentiator Inquiry window opens.




**Item Differentiator Inquiry Window**

**Note:** You can also access this window from the Item Master Editor window and the Item Master Inquiry window.

### Display Item Diffs

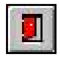
1. If an item is currently displayed, click the clear button.
2. Click the enter query button.
3. Enter an item ID or UPC in the appropriate query field, or click either LOV button and select the item.
4. Click the execute query button. The diff groups and diffs that match the criterion appear.

**Note:** Both diffs and diff groups may be listed in the Diff/Group table. If the Group Flag is Y, the ID refers to a diff group. If the Group Flag is N, the ID refers to a diff.

### View Diffs

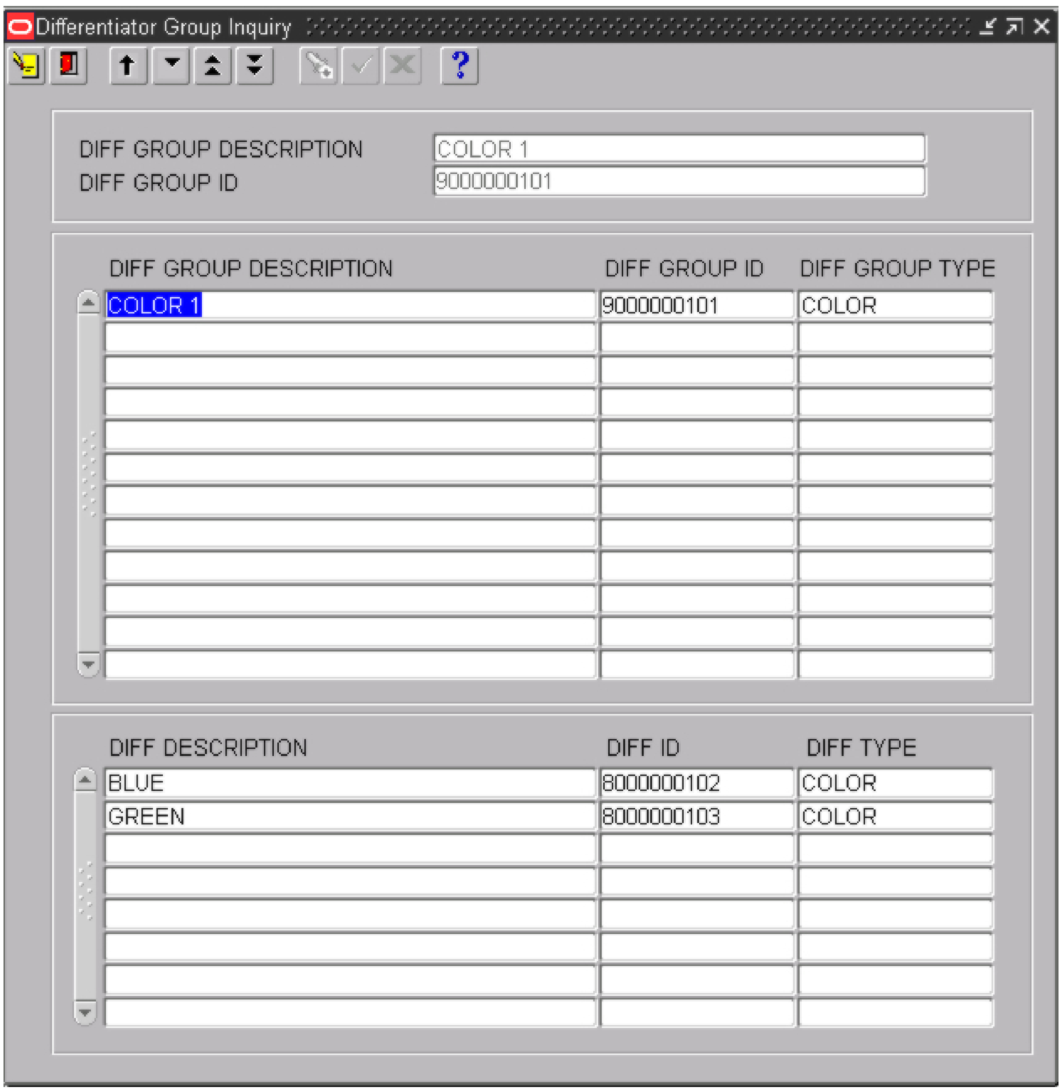
- Select a diff group in the Diff/Group table. The diffs associated with the diff group appear in the Diff table.

### Exit the Item Differentiator Inquiry Window

- Click the exit  button to close the window.

## View Diff Groups

**Navigate:** From the main menu, select Support Functions > Item Setup > Differentiator Group Inquiry. The Differentiator Group Inquiry window opens.




**Differentiator Group Inquiry Window**

**Note:** You can also access this window from the Item Differentiator Inquiry window.

### Display All Diff Groups

- Click the execute query button.

### Display a Diff Group

1. If any diff groups are currently displayed, click the clear button.
2. Click the enter query button.
3. In either the Diff Group Description or Diff Group ID query fields, enter a full or partial description or ID, or click either LOV button and select a diff group.
4. Click the execute query button. The diff groups that match the criterion are displayed.

### View Diffs

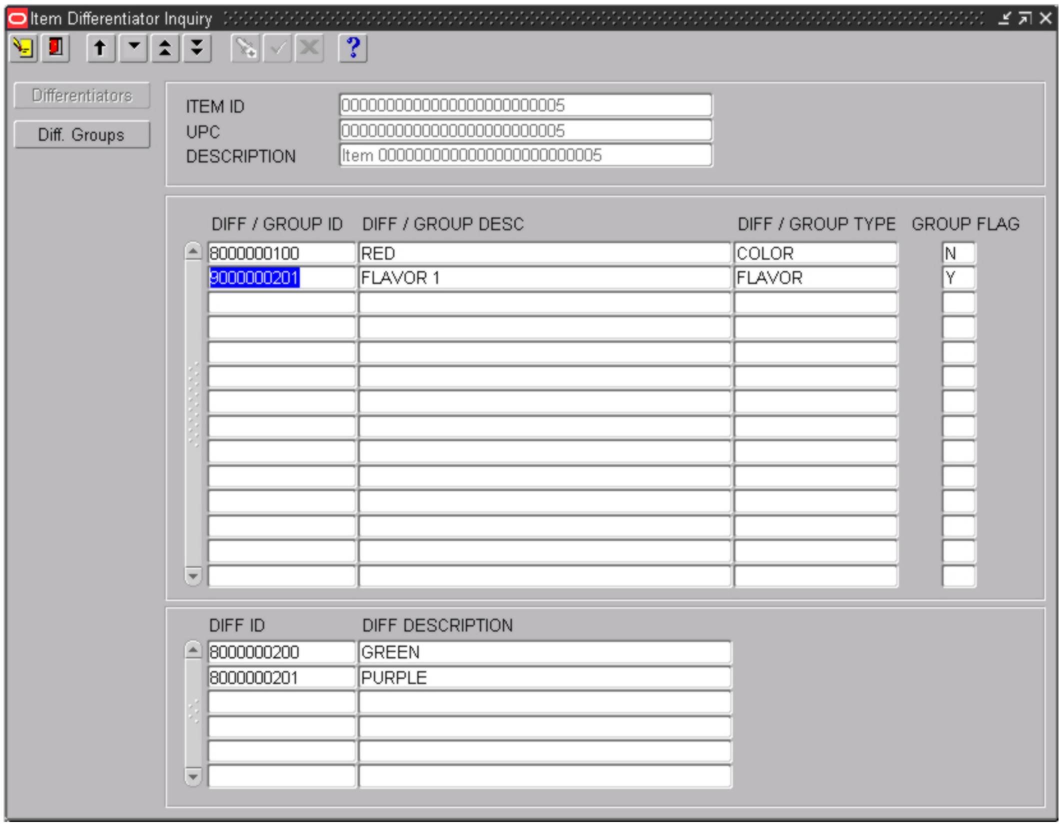
- Select a diff group in the Diff Group table. The diffs associated with the diff group appear in the Diff table.

### Exit the Differentiator Group Inquiry Window

- Click the exit button to close the window.

# View Diffs

**Navigate:** From the main menu, select Support Functions > Item Setup > Differentiator Inquiry. The Differentiator Inquiry window opens.




**Differentiator Inquiry Window**

**Note:** You can also access this window from the Item Differentiator Inquiry window.

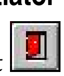
## Display All Diffs

- Click the execute query  button.

## Display a Diff

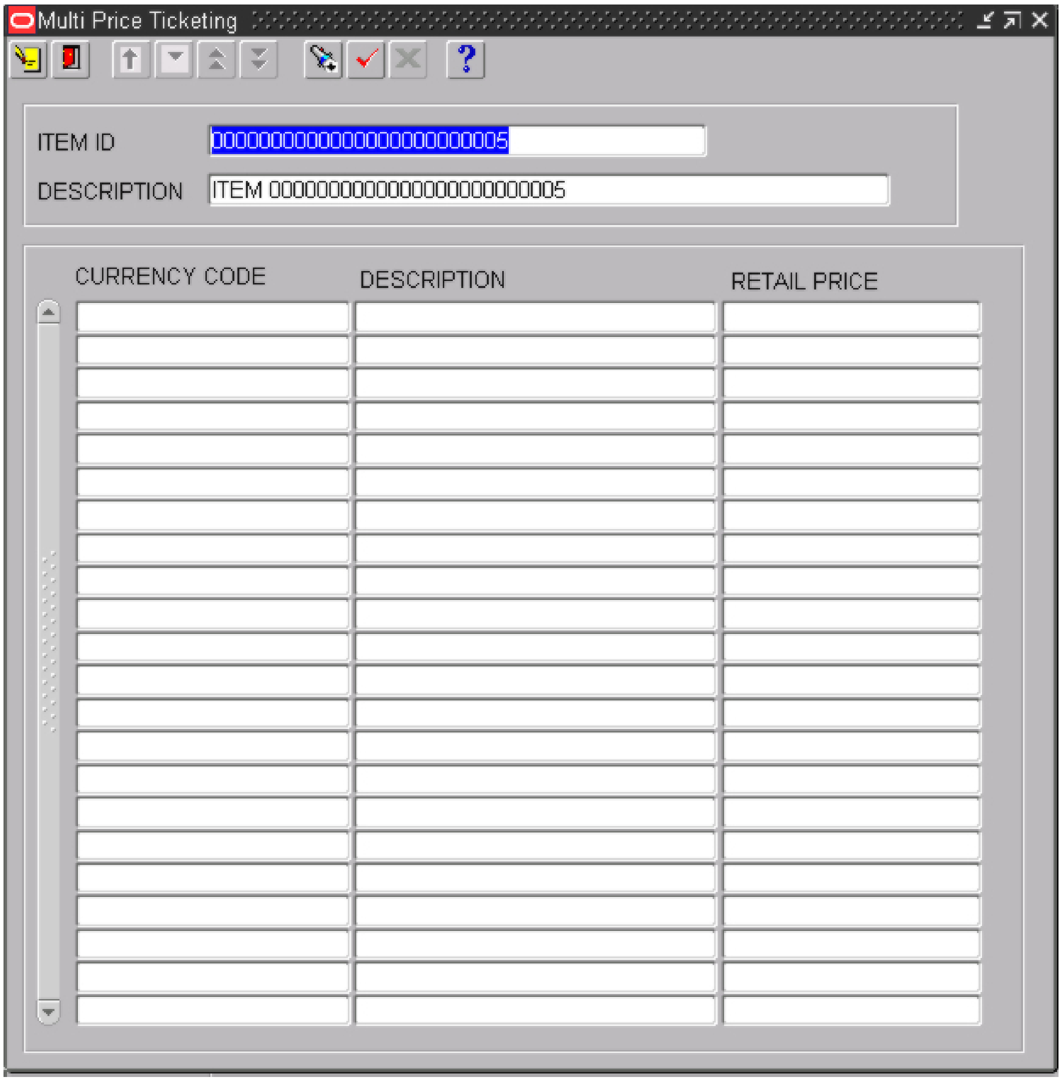
1. If any diffs are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In either the Diff Description or Diff ID query fields, enter a full or partial description or ID, or click either LOV  button and select a diff.
4. Click the execute query  button. The diffs that match the criterion appear.

## Exit the Differentiator Inquiry Window

- Click the exit  button to close the window.

## View Multi-Price Ticketing Details

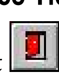
**Navigate:** There are multiple ways to access the Multi Price Ticketing window:




**Multi Price Ticketing Window**

- From the main menu, select Support Functions > Item Setup > Item Master Editor. On the Item Master Editor window, click **Currency Price**.
- From the main menu, select Support Functions > Item Setup > Item Master Inquiry. On the Item Master Inquiry window, click **Currency Price**.
- From the main menu, select Processing > Ticketing. On the Ticketing window, select a print queue. Click **Continue**. On the Ticketing (container/item) window, query for a container. Select an item. Click **Currency Price**.

### Exit the Multi Price Ticketing Window

- Click the exit  button to close the window.

## Generate the Class Profile Report

**Navigate:** From the main menu, select Support Functions > Reports > Class Profile Report Request. The Item/Location Class Profile Report Request window opens.

> **Note:** You can also access this window from the Location Class Editor, Location Editor, and Item Class Editor windows. The field names on this window vary depending on how you access the window.

1. Select either the Item Profile or Location Profile option depending on the type of profile that you want.
2. In the Level block select either the Class Level or Individual Level option to indicate the level of detail you want.
3. If you selected the Class Level option, enter the following in the Class block:
   a. In the Item Class (or Location Class) field, enter the name of the class, or click the LOV  button and select the Class.
   b. Indicate whether you want to include items (or locations) with exceptions, all items (or locations), or no items (or locations) on the report.
4. If you selected Individual ID level, enter the ID of the item (or location) in the Item ID (or Location ID) field.
5. Click **Print**. The report is sent to the default destination.

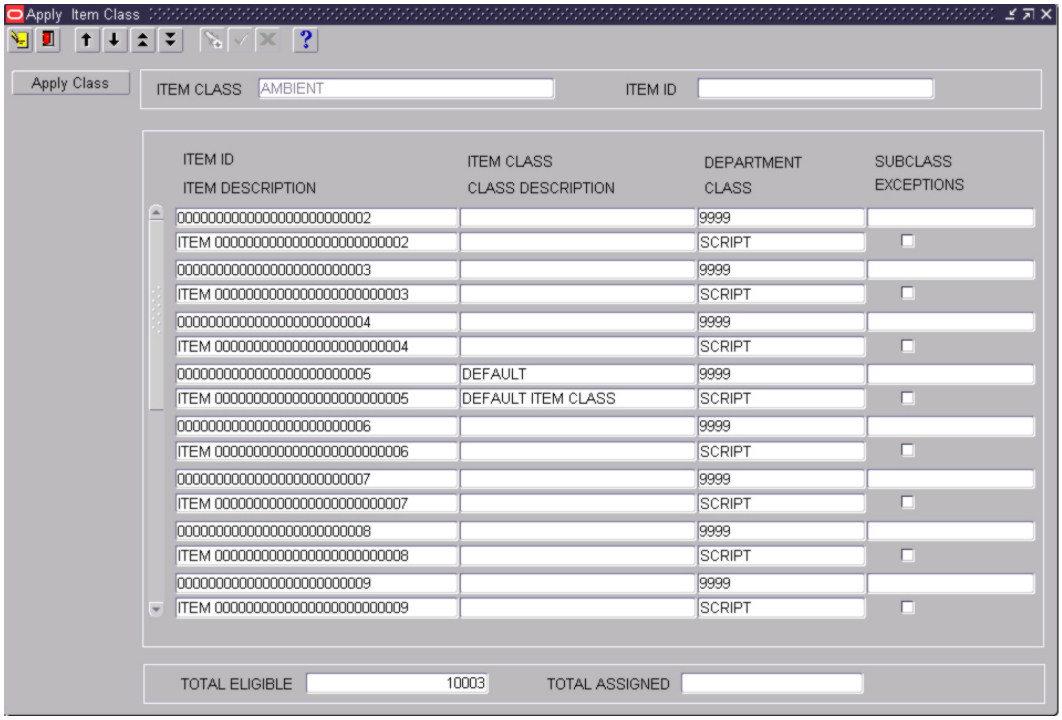
## Apply Item Classes

**Navigate:** From the main menu, select Support Functions > Item Setup > Apply Item Class. The Apply Item Class window opens.

> **Note:** You can also access this window from the New Item Inquiry window and the Item Class Editor window.

### Display Items by Item Class

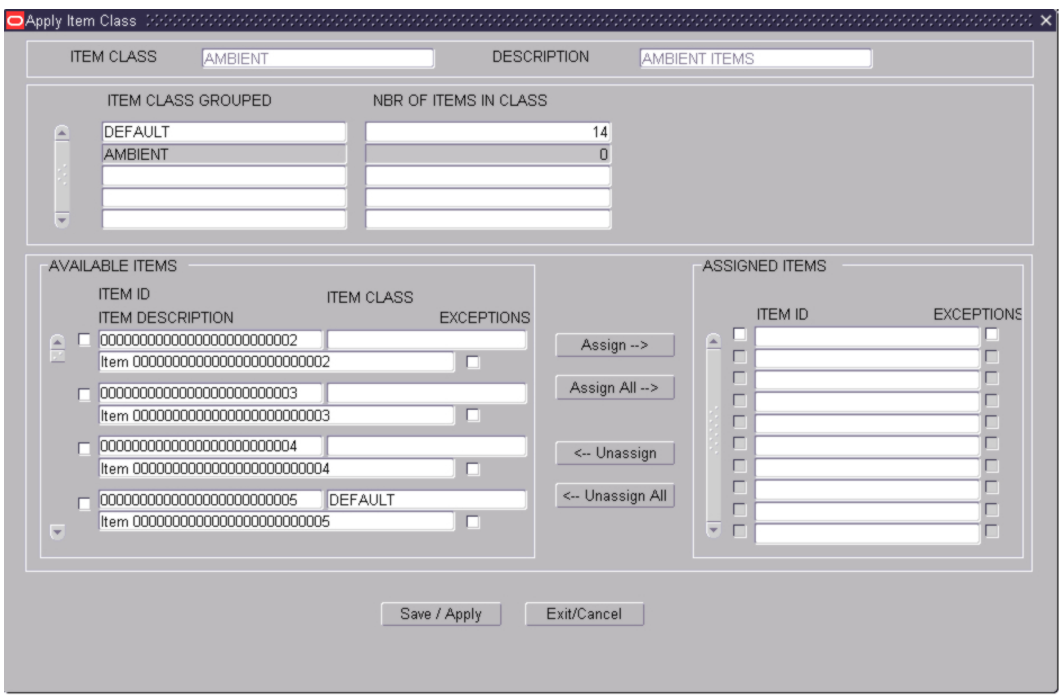
1. If any items or item classes are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Item Class query field, enter the name of the item class, or click the LOV  button and select the item class.
4. Click the execute query  button. The items that match the build rules of or are assigned to the item class appear on the Apply Item Class (by Item Class) window.




**Apply Item Class (by Item Class) Window**

## Assign Items to an Item Class

**1.** On the Apply Item Class window, click **Apply Class**. The Apply Item Class (Assign Items) window opens.




**Apply Item Class (Assign Items) Window**

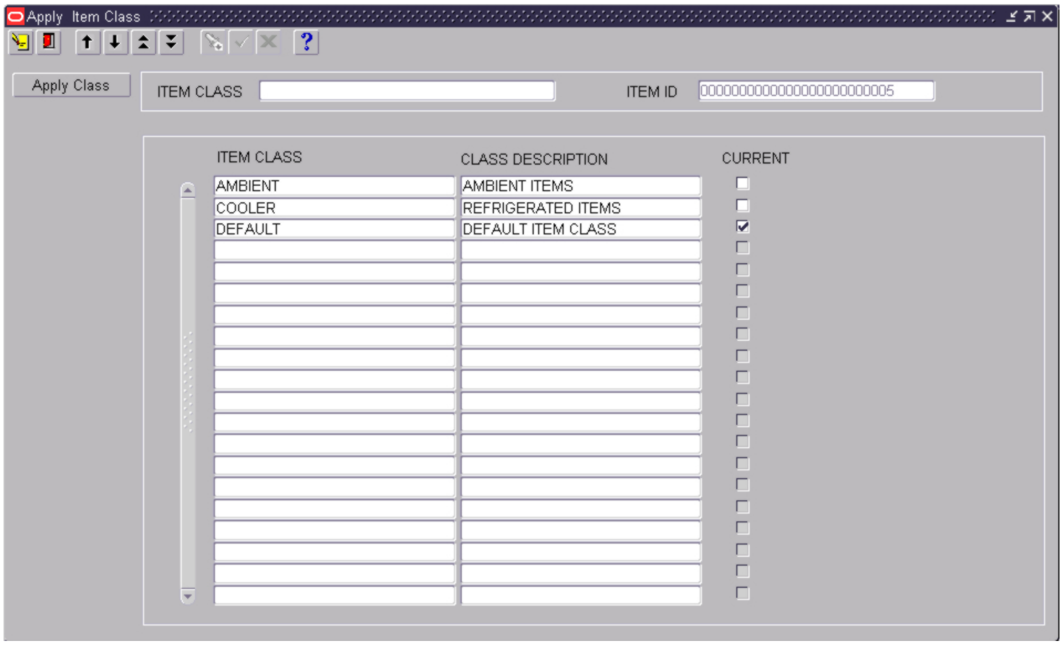
> **Note:** The items that are currently assigned to the location class appear in the Assigned Items table. The remaining items that match the build rules appear in the Available Items table.

2. To assign items:
   a. Select the check box next to the desired items on the Available Items table.
   b. Click **Assign**. The selected items are moved to the Assigned Items table.
3. To remove assigned items:
   a. Select the check box next to the desired items on the Assigned Items table.
   b. Click **Unassign**. The selected items are moved to the Available Items table.
4. Click **Save/Apply** to save the changes and close the Apply Item Class (Assign Items) window.

> **Note:** In the Apply Item Class (Assign Items) window, you can:
>
> 1) Click **Assign All** to move all items to the Assigned Items table or
>
> 2) Click **Unassign All** to move all items to the Available Items table. All items are moved whether or not the check boxes are selected.

### Display Item Classes by Item

1. If any items or item classes are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Item ID query field, enter the ID of the item, or click the LOV  button and select the item.
4. Click the execute query  button. The item classes that match the selected item appear. The Current check box is selected next to the item class, if any, that is currently assigned to the item on the Apply Item Class (by Item) window.




**Apply Item Class (by Item) Window**

## Assign an Item Class to an Item

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**Note:** This procedure is applicable if the item matches more than one item class.

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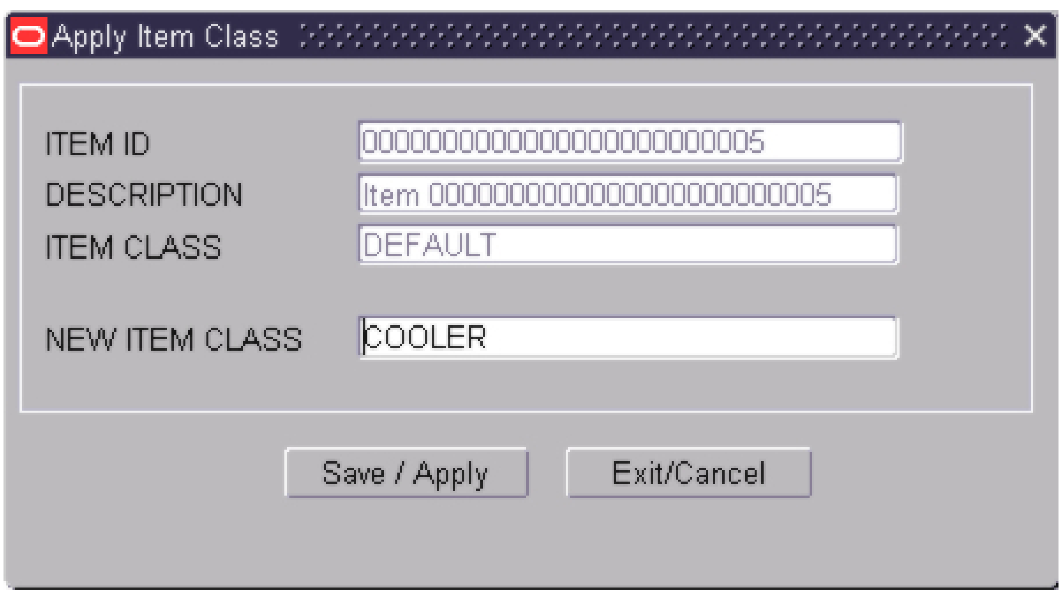
1. On the Apply Item Class window, select the item class that you want to assign to an item.
2. Click **Apply Class**. The Apply Item Class (Assign Item Class) window opens.




**Apply Item Class (Assign Item Class) Window**

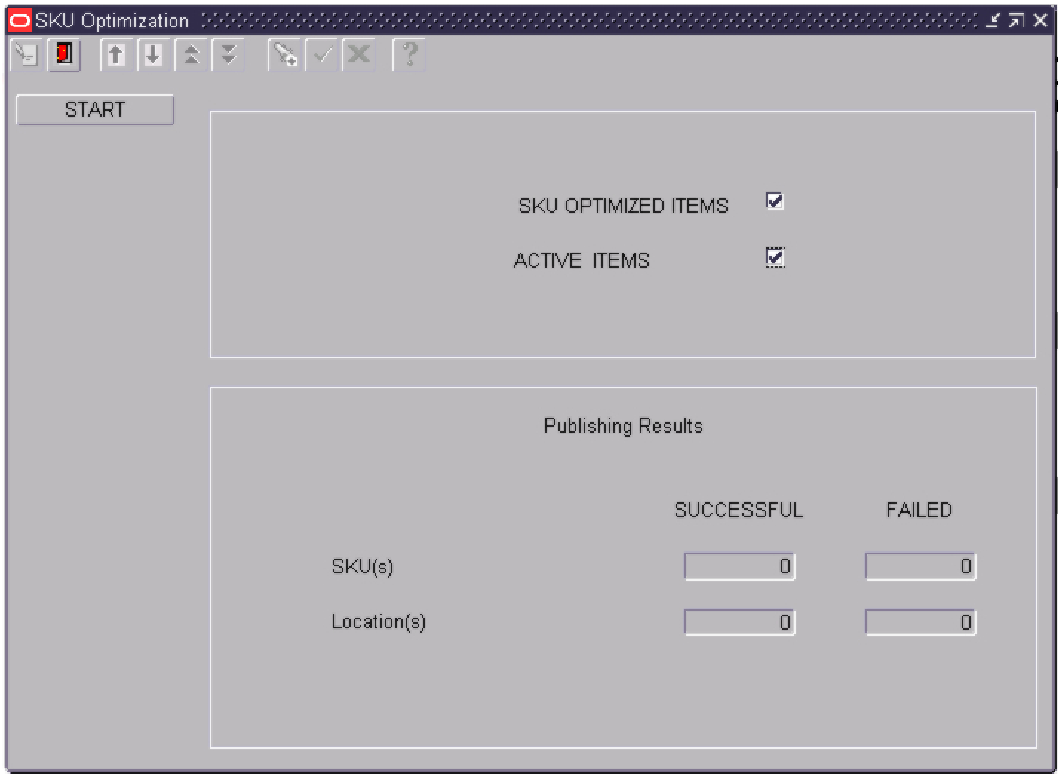
3. If the item class named in the New Item Class field is correct, click **Save/Apply**. The Apply Item Class (Assign Item Class) window is closed and the item class is assigned to the selected item.

### Exit the Apply Item Class Window

- Click the exit button to close the window.

## Transmit SKU Profiles

**Navigate:** From the main menu, select Support Functions > SKU Profiling. The SKU Optimization window opens.




**SKU Optimization Window**

### Transmit SKU Profiles

1. Select the SKU profiles to be sent to a warehouse optimization application:
   - To send items marked for SKU optimization, select the SKU Optimized Items check box.
   - To send items located in forward pick locations, select the Active Items check box.
2. Click **Start**. The results appear in the Publishing Results block.

### Exit the SKU Optimization Window

- Click the exit button to close the window.

# Processing/Returns Setup

Processing returns and merchandise in inventory relies heavily on several types of codes and processes. Those codes and processes are defined in the Processing/Returns Setup module.

Processes must be set up for each task that may be assigned to DC personnel. In defining the processes, you customize how tasks are presented to users and how users must record their activities. After defining the processes, you may assign them to item configurations, locations, and users. RWMS uses this information when calculating which tasks should be assigned to operators.

## Business Process

You can set up the following types of codes:

- Trouble codes: Appointment trouble codes provide a way to track vendor performance. Container trouble codes are used to document problems occurring with containers/items that must be resolved.
- Inventory adjustment codes: Disposition codes indicate what is to be done with merchandise that is returned by the customer. Reason codes indicate whether an adjustment to inventory is positive or negative. Return codes indicate 1) why merchandise was returned or 2) what action to take with returned merchandise.
- WIP codes: Work in process (WIP) codes are applied to containers, automatically or manually, in order to direct merchandise to locations where value added services can be performed. WIP codes must be defined and sequentially ordered, if necessary. You can also indicate which windows a user must access in order to process the WIP codes.

To set up processes, you perform the following steps:

- Identify process types. Assign presentation types and RF screens to the process types. These assignments indicate how tasks are to be presented to users.
- Set up processes. Assign a process type to each process. The processes inherit the presentation types and RF screens from the process types. Activate the appropriate keys on the RF screens and assign equipment classes to the processes.
- Assign attributes to processes. The attributes indicate how users must record their activities. Users will either capture new information or validate existing information.
- Define the process percentage groups. The process percentages allow you to define how a wave is distributed across various processes.
- Multiple processes may be grouped as a workflow. Define the workflows and assign processes to them in a logical order.

You can create cycle count plans in this module. Basically, the plan states the frequency for a cycle count. You might create a plan for daily counts, weekly counts, and so on. Depending on system settings, cycle count plans may be assigned to zones, locations, or items.

You can generate generic labels, nullify unused labels, and reprint labels for receiving and picking packages, as well as for stock or distributed merchandise.

## Reports

There are no reports that pertain to processing and returns setup.

## Cycle Count Plans

Cycle counting is the process of taking inventory at locations within a DC. Locations may be manually marked for cycle counts. Another option is to allow the system to automatically mark locations for cycle counts. The system marks locations depending on the method that you choose in the system settings. The methods you can choose from are by location, zone, and item.

### Cycle Counts By Location

Specify how often, in days, the entire distribution center should be counted. Each day, a number of locations are automatically marked for counting. For example, if there are 1000 locations and the frequency is 100 days, RWMS marks 10 locations every day for counting.

To set up cycle counts by location, the system parameter, cycle_count_type, must be set to location. The parameter, cycle_count_period, must be set to the desired number of days.

### Cycle Counts by Zone

Specify how often, in days, the locations within each zone are counted. The system automatically marks the locations for cycle counting. Different zones can have different cycle count frequencies.

To set up cycle counts by zone, the system parameter, cycle_count_type, must be set to zone. Cycle count plans must be defined in the Cycle Count Planning window. On the Zone Editor window, select the appropriate cycle count plan for the zone.

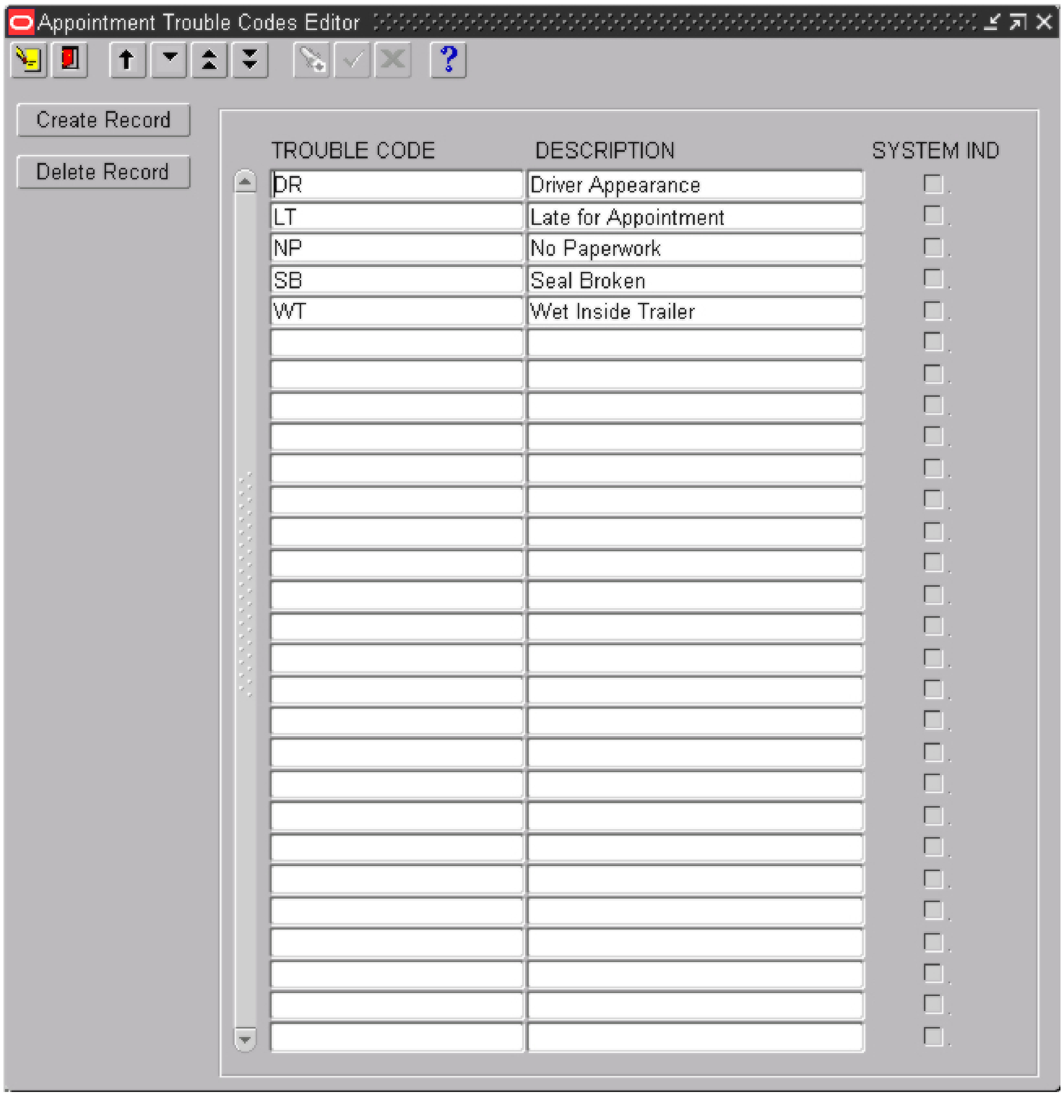
### Cycle Counts by Item

Specify how often, in days, the locations containing the specified item are counted. The system automatically marks the location for cycle counting. If the location contains an assortment of items, all items within the location must be counted. Different items can have different cycle count frequencies. Note that if a location contains an assortment of items, the location may be marked for counting more frequently than desired, since cycle counts may overlap each other.

To set up cycle counts by item, the system parameter, cycle_count_type, must be set to item. On the Cycle Count Planning window, define the cycle count plans. On the Item Master Editor window, select the appropriate cycle count plan for the item.

## Maintain Trouble Codes for Appointments

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Appointment Trouble Codes Editor. The current trouble codes appear in the Appointment Trouble Codes Editor window.




**Appointment Trouble Codes Editor Window**

### Edit a Trouble Code

1. On the Appointment Trouble Codes Editor window, double-click the trouble code that you want to edit. The Create/Modify window opens.


**Create/Modify Window**

2. Edit the description as necessary.
3. Click **Save** to save any change and close the Create/Modify window.

### Add a Trouble Code

1. On the Appointment Trouble Codes Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Trouble Code field, enter a code for the trouble.
3. In the Description field, enter a description for the trouble.
4. Click **Save** to save the change and close the Create/Modify window.

### Delete a Trouble Code

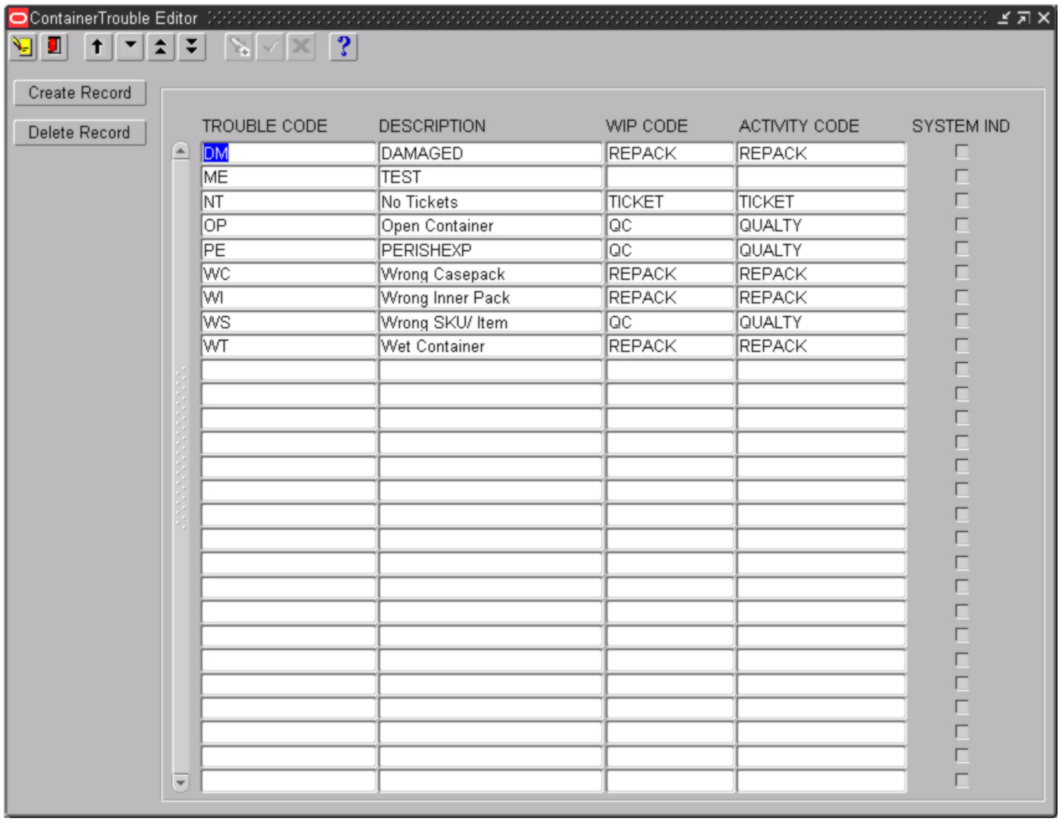
1. On the Appointment Trouble Codes Editor window, select the trouble code that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Appointment Trouble Codes Editor Window

- Click the exit  button to close the window.

## Maintain Trouble Codes for Containers

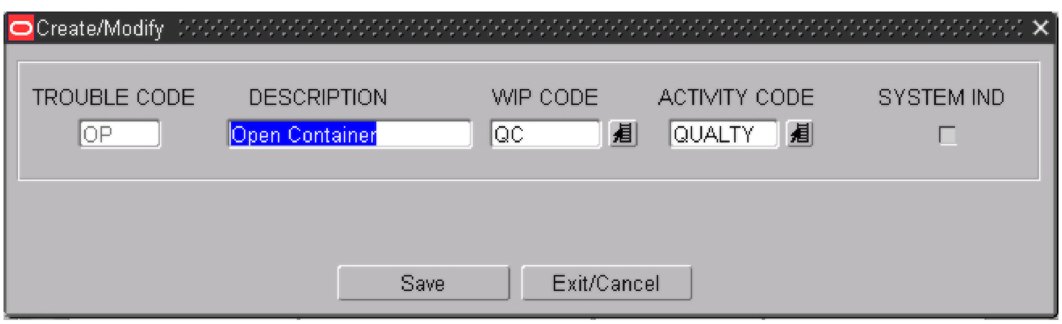
**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Container Trouble Editor. The current trouble codes appear in the Container Trouble Editor window.




**Container Trouble Editor Window**

### Edit a Trouble Code

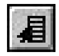
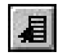
1. On the Container Trouble Editor window, double-click the trouble code that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description, WIP code, and activity code as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Trouble Code

1. On the Container Trouble Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Trouble Code field, enter a code for the trouble.
3. In the Description field, enter a description for the trouble.
4. In the WIP Code field, enter the WIP code that you want to associate with the trouble code, or click the LOV  button and select the WIP code.
5. In the Activity Code field, enter the activity code that you want to associated with the trouble code, or click the LOV  button and select the activity code.

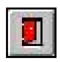
**Note:** WIP codes and activity codes are optional.

6. Click **Save** to save the change and close the Create/Modify window.

### Delete a Trouble Code

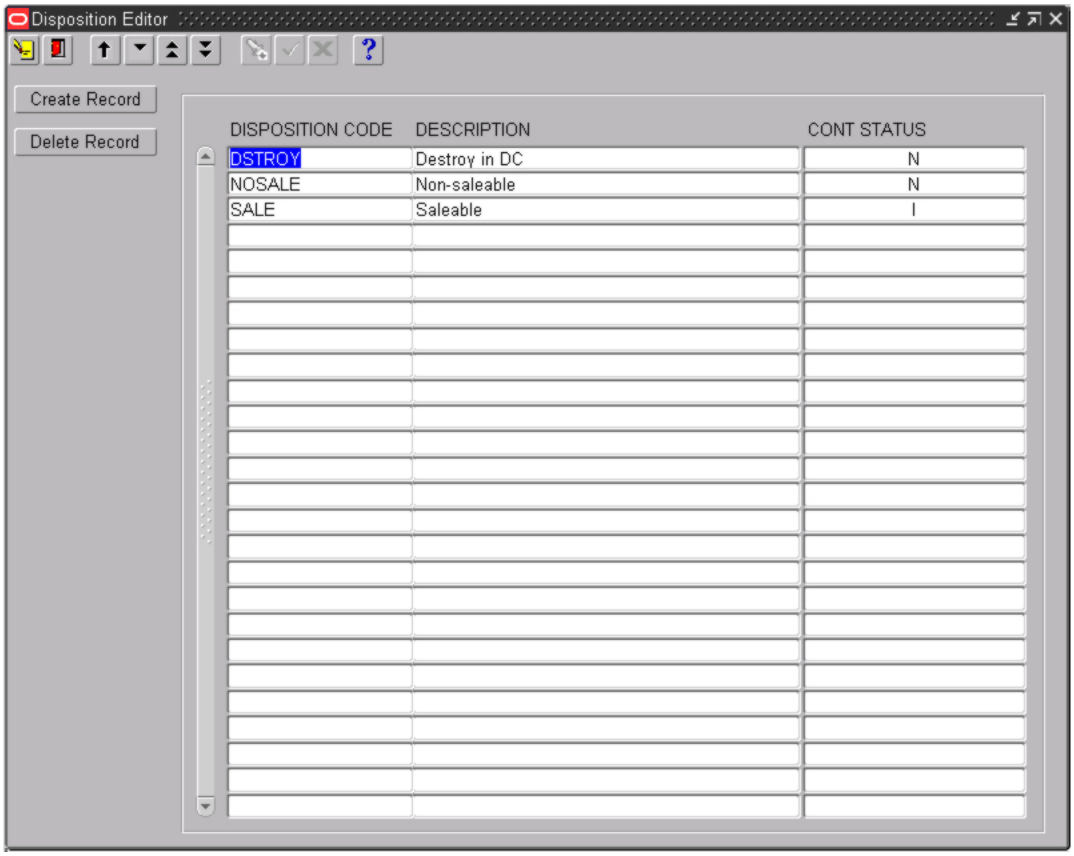
1. On the Container Trouble Editor window, select the trouble code that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Container Trouble Editor Window

- Click the exit  button to close the window.

## Maintain Disposition Codes

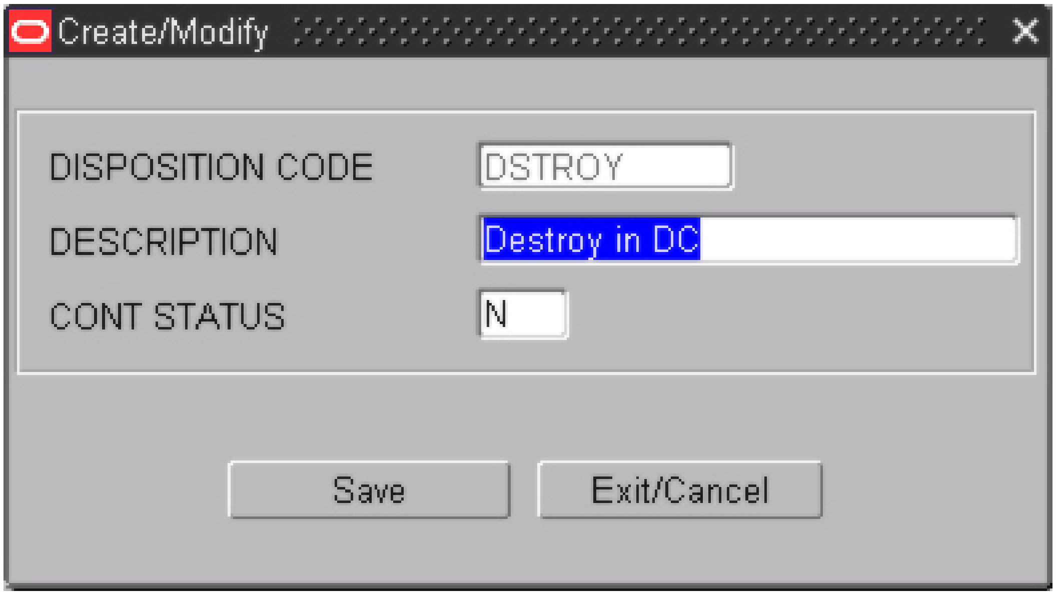
**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Disposition Code Editor. The current disposition codes appear in the Disposition Editor window.




**Disposition Editor Window**

### Edit a Disposition Code

1. On the Disposition Editor window, double-click the disposition code that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description and container status as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

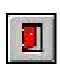
### Add a Disposition Code

1. On the Disposition Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Disposition Code and Description fields, enter a code and description for the disposition.
3. In the Cont Status field, enter the status of containers associated with the disposition code. The status may be I (Inventory) or N (Nonsaleable)
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Disposition Code

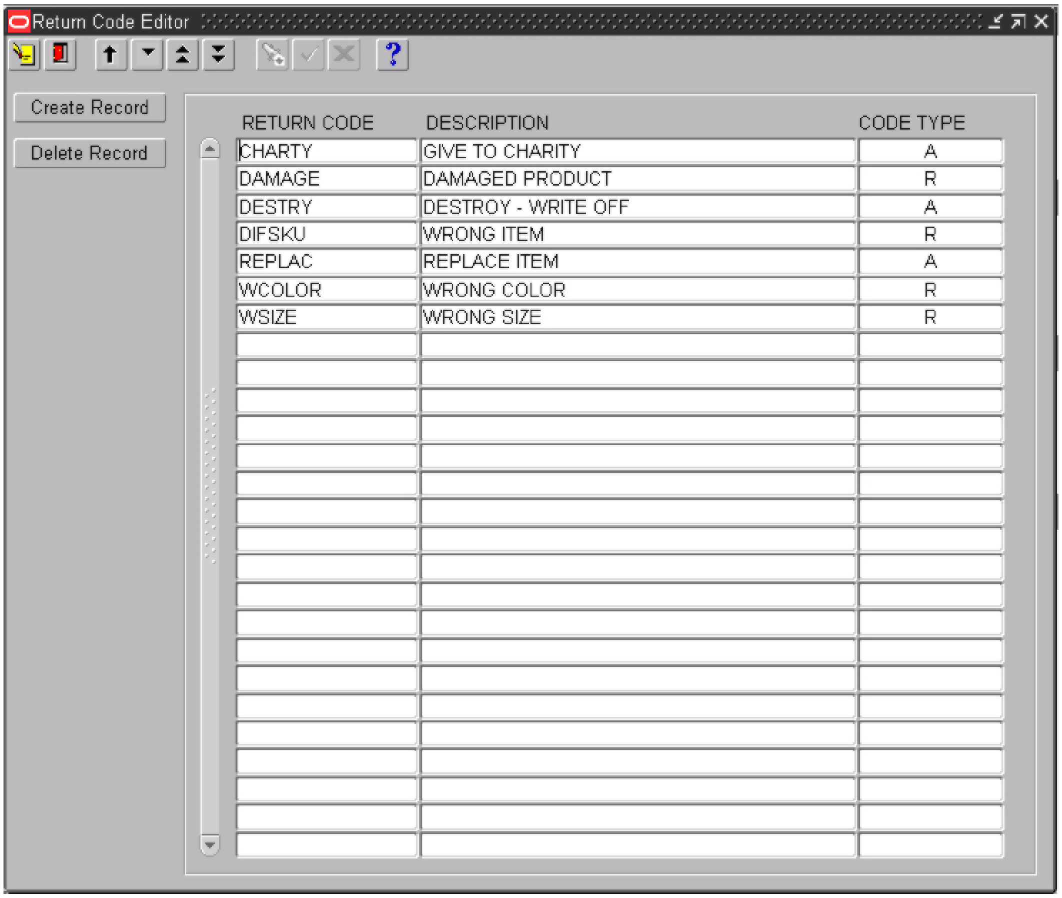
1. On the Disposition Editor window, select the disposition code that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Disposition Editor Window

- Click the exit  button to close the window.

## Maintain Return Codes

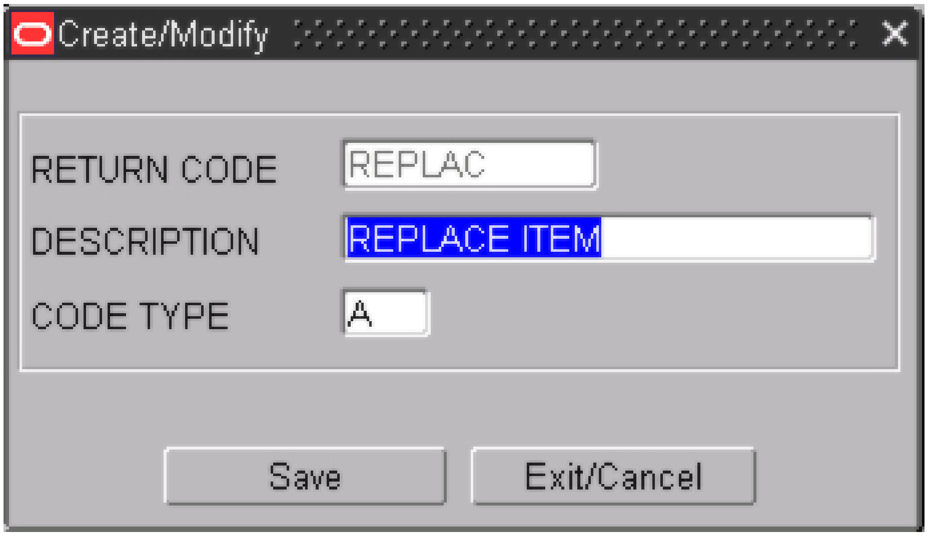
**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Return Code Editor. The current return codes appear in the Return Code Editor window.




**Return Code Editor Window**

### Edit a Return Code

1. On the Return Code Editor window, double-click the return code that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description and code type as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

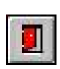
### Add a Return Code

1. On the Return Code Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Return Code field, enter a code for the return.
3. In the Description field, enter a description for the return.
   The description states either the reason for the return or the action to be taken with the returned merchandise.
4. In the Code Type field, enter A for an action code or R for a reason code.
5. Click **Save** to save the change and close the Create/Modify window.

### Delete a Return Code

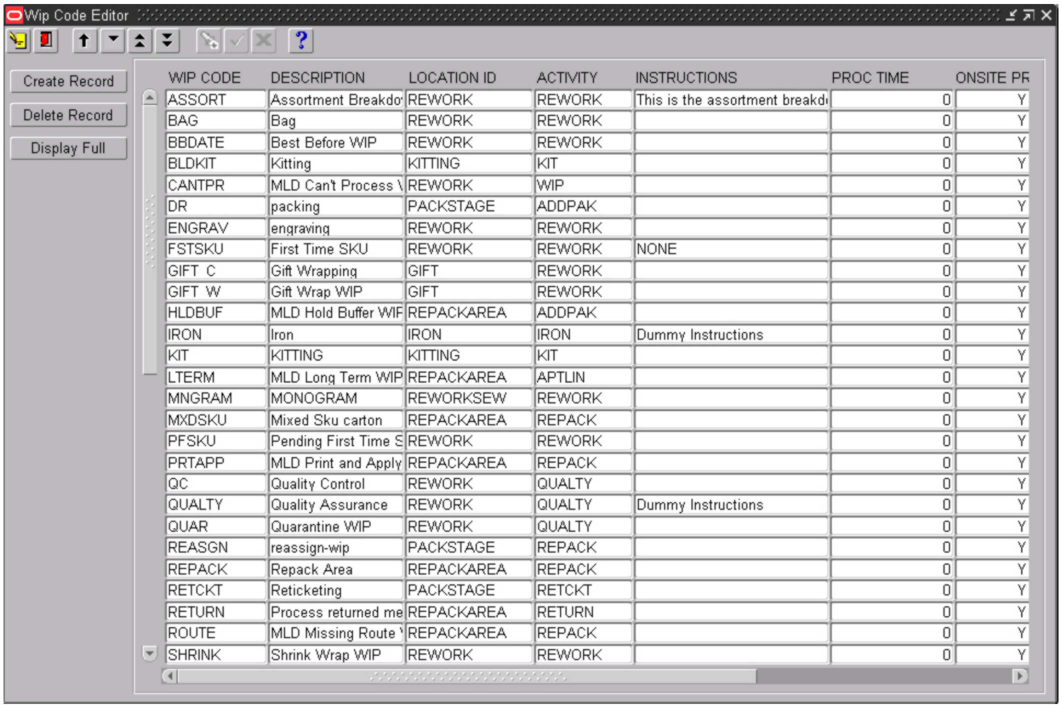
1. On the Return Code Editor window, select the return code that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Return Code Editor Window

- Click the exit  button to close the window.

## Maintain WIP Codes

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > WIP Code Editor. The current WIP codes appear in the WIP Code Editor window.




| WIP CODE | DESCRIPTION | LOCATION ID | ACTIVITY | INSTRUCTIONS | PROC TIME | ONSITE PR |
|---|---|---|---|---|---|---|
| ASSORT | Assortment Breakdo | REWORK | REWORK | This is the assortment breakd | 0 | Y |
| BAG | Bag | REWORK | REWORK | | 0 | Y |
| BBDATE | Best Before WIP | REWORK | REWORK | | 0 | Y |
| BLDKIT | Kitting | KITTING | KIT | | 0 | Y |
| CANTPR | MLD Can't Process \ | REWORK | WIP | | 0 | Y |
| DR | packing | PACKSTAGE | ADDPAK | | 0 | Y |
| ENGRAV | engraving | REWORK | REWORK | | 0 | Y |
| FSTSKU | First Time SKU | REWORK | REWORK | NONE | 0 | Y |
| GIFT C | Gift Wrapping | GIFT | REWORK | | 0 | Y |
| GIFT W | Gift Wrap WIP | GIFT | REWORK | | 0 | Y |
| HLDBUF | MLD Hold Buffer WIF | REPACKAREA | ADDPAK | | 0 | Y |
| IRON | Iron | IRON | IRON | Dummy Instructions | 0 | Y |
| KIT | KITTING | KITTING | KIT | | 0 | Y |
| LTERM | MLD Long Term WIP | REPACKAREA | APTLIN | | 0 | Y |
| MNGRAM | MONOGRAM | REWORKSEW | REWORK | | 0 | Y |
| MXDSKU | Mixed Sku carton | REPACKAREA | REPACK | | 0 | Y |
| PFSKU | Pending First Time S | REWORK | REWORK | | 0 | Y |
| PRTAPP | MLD Print and Apply | REPACKAREA | REPACK | | 0 | Y |
| QC | Quality Control | REWORK | QUALTY | | 0 | Y |
| QUALTY | Quality Assurance | REWORK | QUALTY | Dummy Instructions | 0 | Y |
| QUAR | Quarantine WIP | REWORK | QUALTY | | 0 | Y |
| REASGN | reassign-wip | PACKSTAGE | REPACK | | 0 | Y |
| REPACK | Repack Area | REPACKAREA | REPACK | | 0 | Y |
| RETCKT | Reticketing | PACKSTAGE | RETCKT | | 0 | Y |
| RETURN | Process returned me | REPACKAREA | RETURN | | 0 | Y |
| ROUTE | MLD Missing Route \ | REPACKAREA | REPACK | | 0 | Y |
| SHRINK | Shrink Wrap WIP | REWORK | REWORK | | 0 | Y |

**WIP Code Editor Window**

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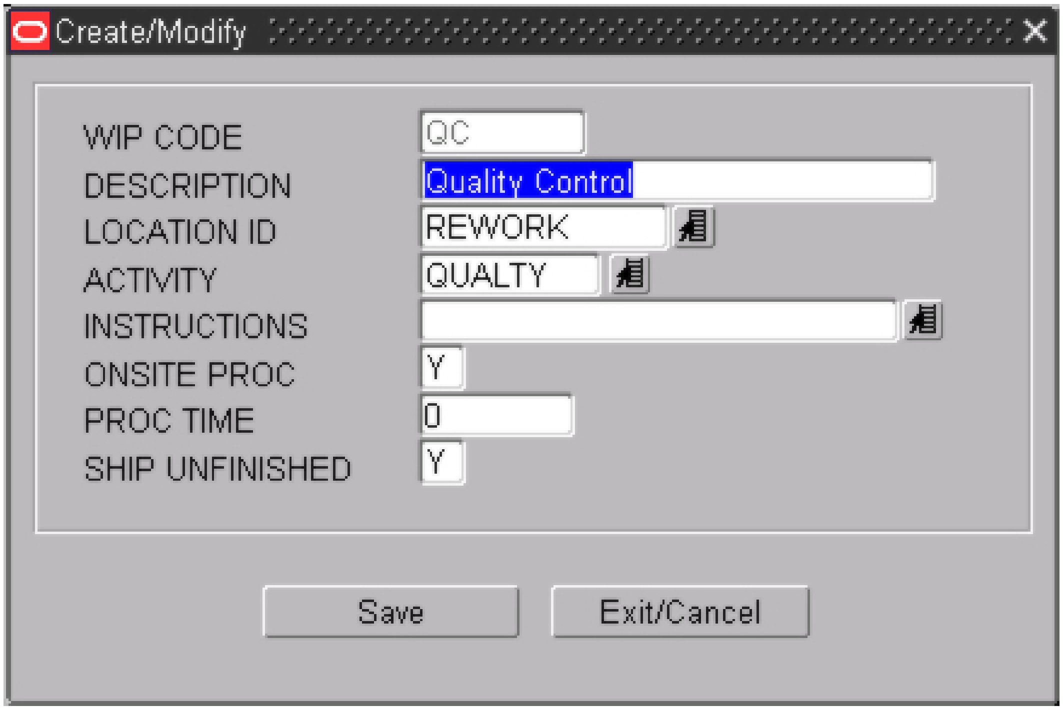
**Note:** To view the instructions for a WIP code in a separate window, select the WIP code and click **Display Full**.

---

### Edit a WIP Code

1. On the WIP Code Editor window, double-click the WIP code that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a WIP Code

1. On the WIP Code Editor window, click **Create Record**. The Create/Modify window opens.
2. In the WIP Code and Description fields, enter a code and description for the WIP.
3. In the Location ID field, enter the ID of the location where the activity takes place, or click the LOV button and select the location.
4. In the Activity field, enter the code for the activity associated with the WIP, or click the LOV button and select the activity.
5. In the Instructions field, enter instructions for the activity if it pertains to gift wrapping or personalization.
6. In the Onsite Proc field, enter Y (Yes) if the WIP is handled at the distribution center or N (No) if it is handled off-site.
7. In the Proc Time field, enter the standard processing time in minutes.
8. In the Ship Unfinished field, enter Y (Yes) if merchandise may be shipped even if the WIP is not processed or N (No) if the WIP must be processed.
9. Click **Save** to save the changes and close the Create/Modify window.

### Delete a WIP Code

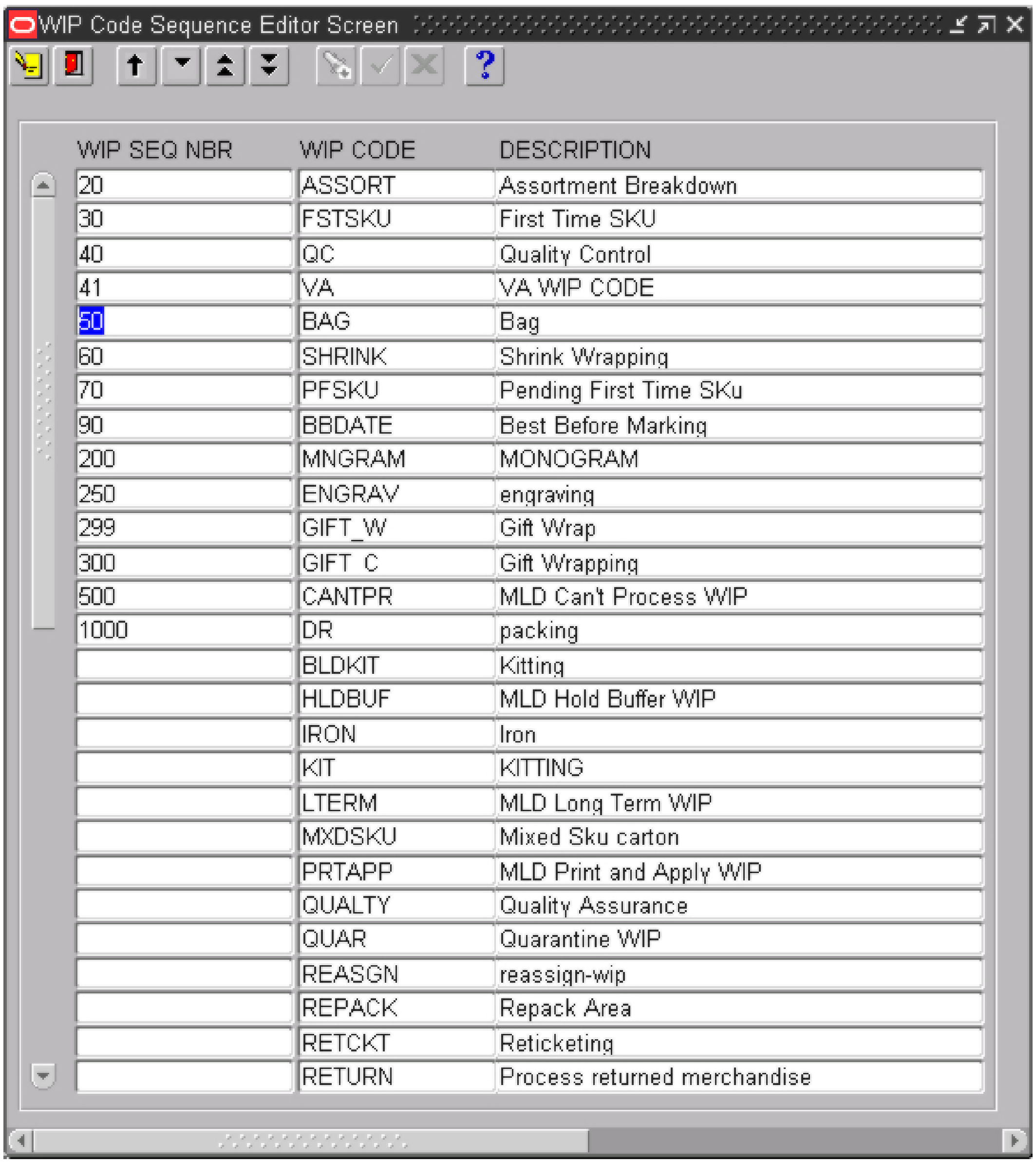
1. On the WIP Code Editor window, select the WIP code that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the WIP Code Editor Window

- Click the exit button to close the window.

## Maintain WIP Code Sequences

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > WIP Code Sequence Editor. The current WIP code sequences appear in the WIP Code Sequence Editor Screen window.

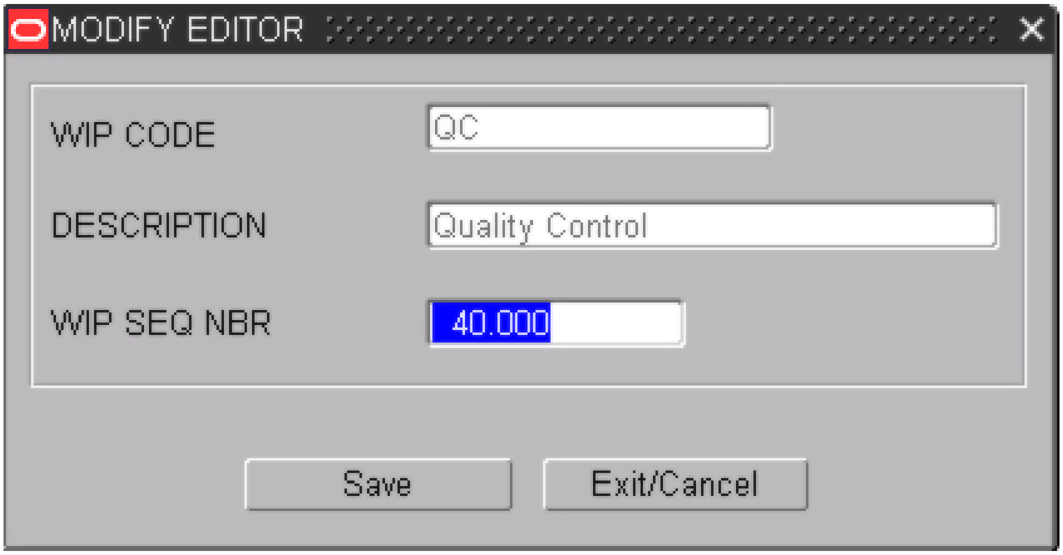



| WIP SEQ NBR | WIP CODE | DESCRIPTION |
|---|---|---|
| 20 | ASSORT | Assortment Breakdown |
| 30 | FSTSKU | First Time SKU |
| 40 | QC | Quality Control |
| 41 | VA | VA WIP CODE |
| 50 | BAG | Bag |
| 60 | SHRINK | Shrink Wrapping |
| 70 | PFSKU | Pending First Time SKu |
| 90 | BBDATE | Best Before Marking |
| 200 | MNGRAM | MONOGRAM |
| 250 | ENGRAV | engraving |
| 299 | GIFT_W | Gift Wrap |
| 300 | GIFT_C | Gift Wrapping |
| 500 | CANTPR | MLD Can't Process WIP |
| 1000 | DR | packing |
| | BLDKIT | Kitting |
| | HLDBUF | MLD Hold Buffer WIP |
| | IRON | Iron |
| | KIT | KITTING |
| | LTERM | MLD Long Term WIP |
| | MXDSKU | Mixed Sku carton |
| | PRTAPP | MLD Print and Apply WIP |
| | QUALTY | Quality Assurance |
| | QUAR | Quarantine WIP |
| | REASGN | reassign-wip |
| | REPACK | Repack Area |
| | RETCKT | Reticketing |
| | RETURN | Process returned merchandise |

**WIP Code Sequence Editor Screen Window**

### Edit a WIP Code Sequence

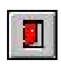
1. On the WIP Code Sequence Editor Screen window, double-click the WIP code that you want to edit. The Modify Editor window opens.




**Modify Editor Window**

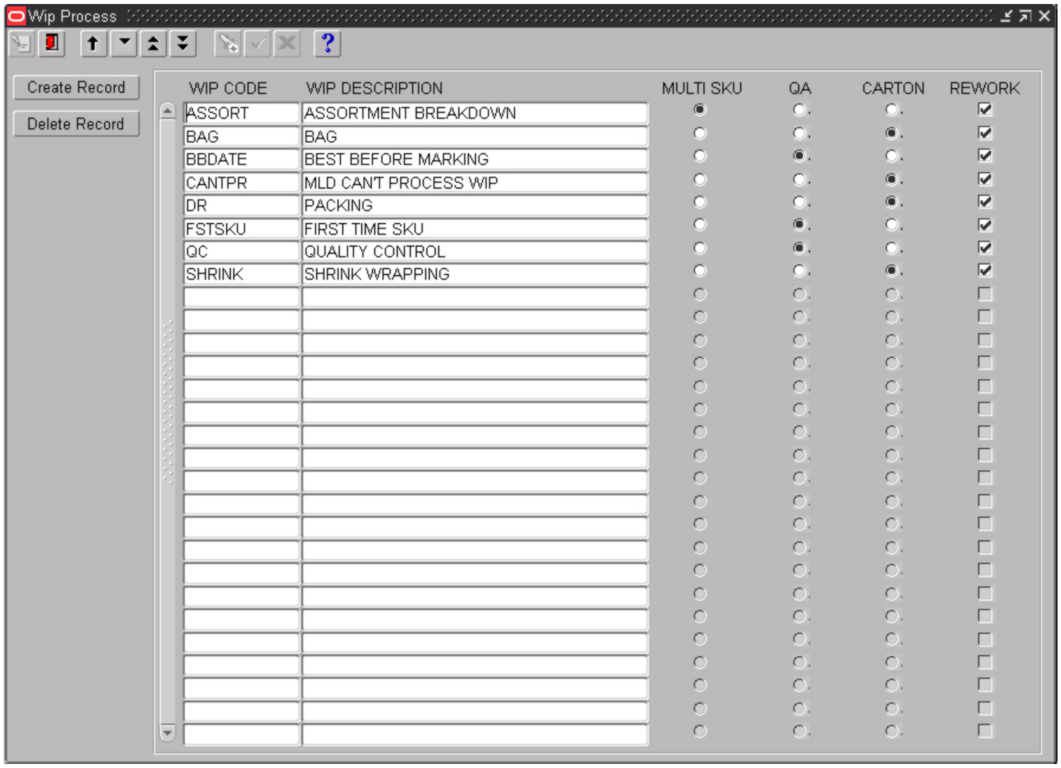
2. Edit the sequence number as necessary.
3. Click **Save** to save any changes and close the Modify Editor window.

### Exit the WIP Code Sequence Editor Screen Window

- Click the exit  button to close the window.

## Maintain WIP Code Processing Assignments

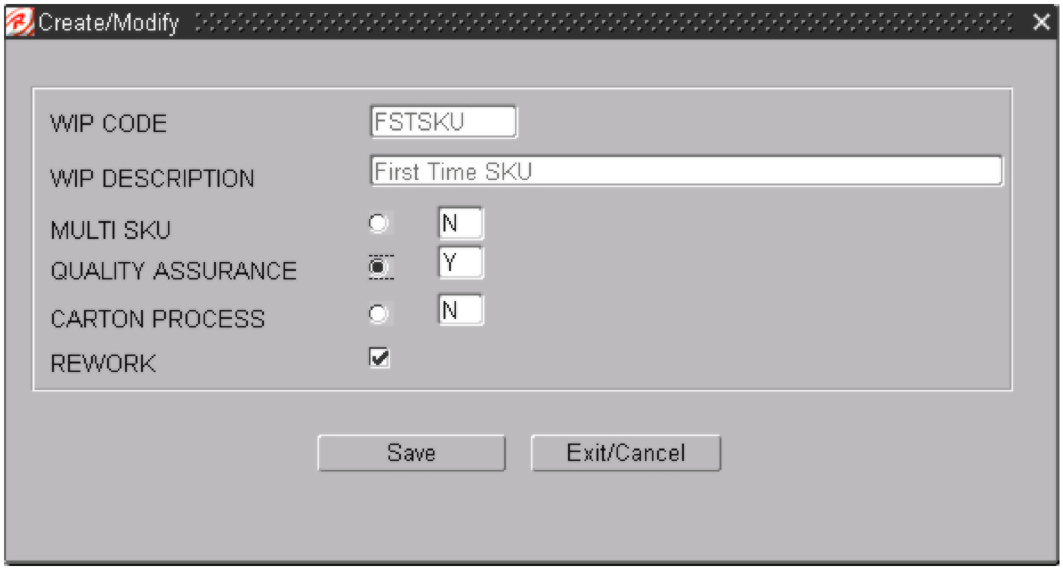
**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > WIP Process Editor. The current WIP code processing assignments are displayed in the WIP Process window.




**WIP Process Window**

## Edit an Assignment

1. On the WIP Process window, double-click the assignment that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Select the appropriate option or enter N in each box in order to clear the selections.
3. Select or clear the Rework check box as necessary.
4. Click **Save** to save any changes and close the Create/Modify window.

## Add an Assignment

1. On the WIP Process window, click **Create Record**. The Create/Modify window opens.
2. In the WIP Code field, enter the WIP code, or click the LOV  button and select the WIP code.
3. Select the appropriate option. To clear all the options, enter N (No) in the boxes to the far right of each option.

   **Note:** When you select an option, you indicate on which window DC personnel will process the WIP code.

4. Select or clear the Rework check box.

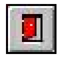
   **Note:** Select the Rework check box if you want DC personnel to process the WIP code through the Rework Screen window. The Rework Screen window provides access to each of the WIP processing windows from which you chose in the previous step.

5. Click **Save** to save the changes and close the Create/Modify window.

### Delete an Assignment

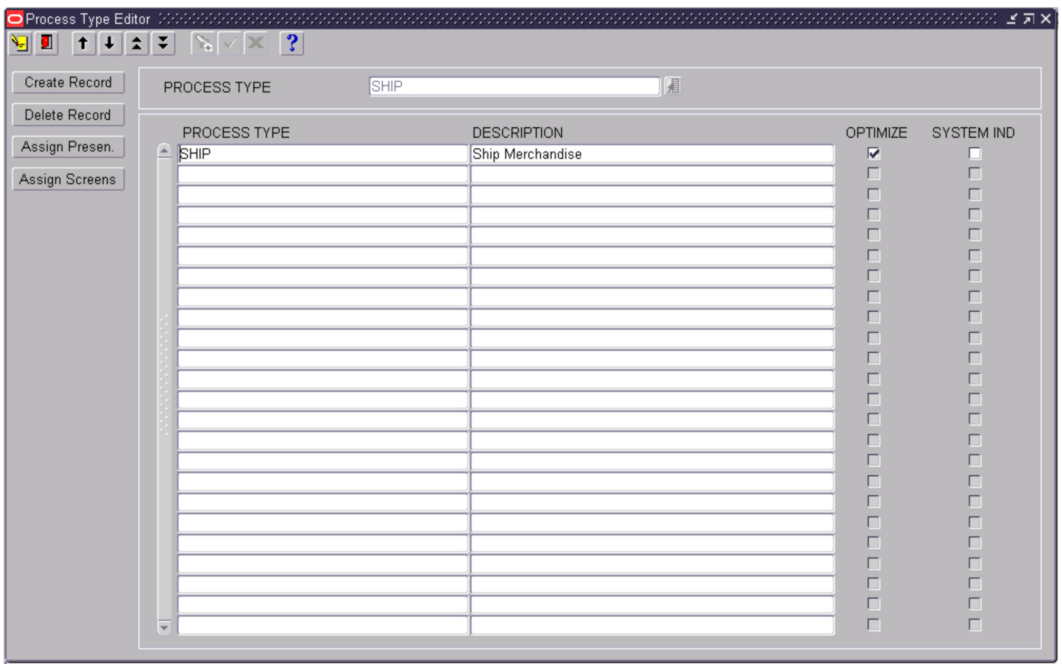
1. On the WIP Process window, select the assignment that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the WIP Process Window

- Click the exit  button to close the window.

## Maintain Process Types

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Process Type Editor. The Process Type Editor window opens.




**Process Type Editor Window**

### Display All Process Types

- Click the execute query  button.

### Display a Process Type

1. If any process types are currently displayed, click the clear  button.
2. Click the enter query  button.
3. In the Process Type query field, enter the name of the process type, or click the LOV  button and select the process type.
4. Click the execute query  button. The process type that matches the search criterion opens.

> **Note:** If you enter a partial name in the Process Type query field, all process types that begin with the same characters will be displayed.

### Edit a Process Type

1. On the Process Type Editor window, double-click the process type that you want to edit. The Create/Modify window opens.


**Create/Modify Window**

> **Note:** You can not edit a process type if the system indicator is selected.

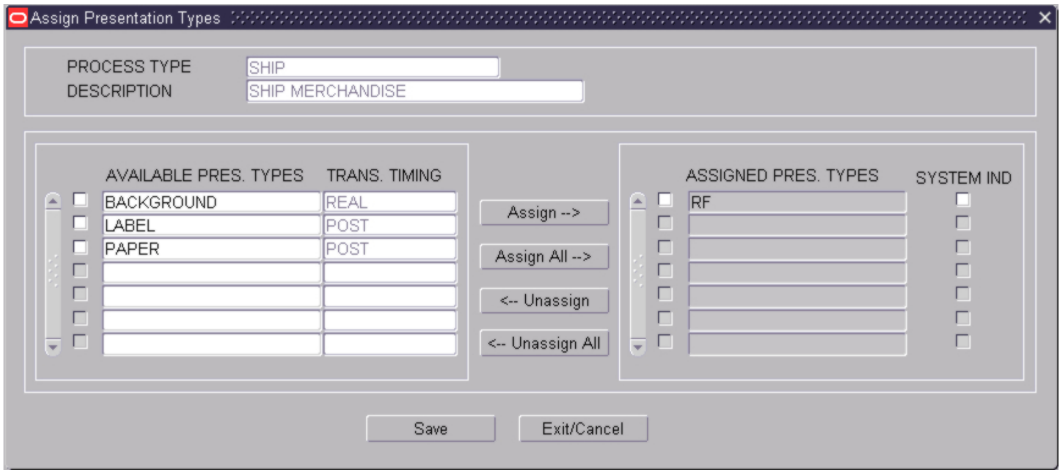
2. Edit the description and optimize option as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Process Type

1. On the Process Type Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Process Type and Description fields, enter a name and description for the process type.
3. Click **Save** to save the changes and close the Create/Modify window.

## Assign Presentation Types to a Process Type

1. On the Process Type Editor window, select the process type that you want to edit.
2. Click **Assign Presen**. The Assign Presentation Types window opens.



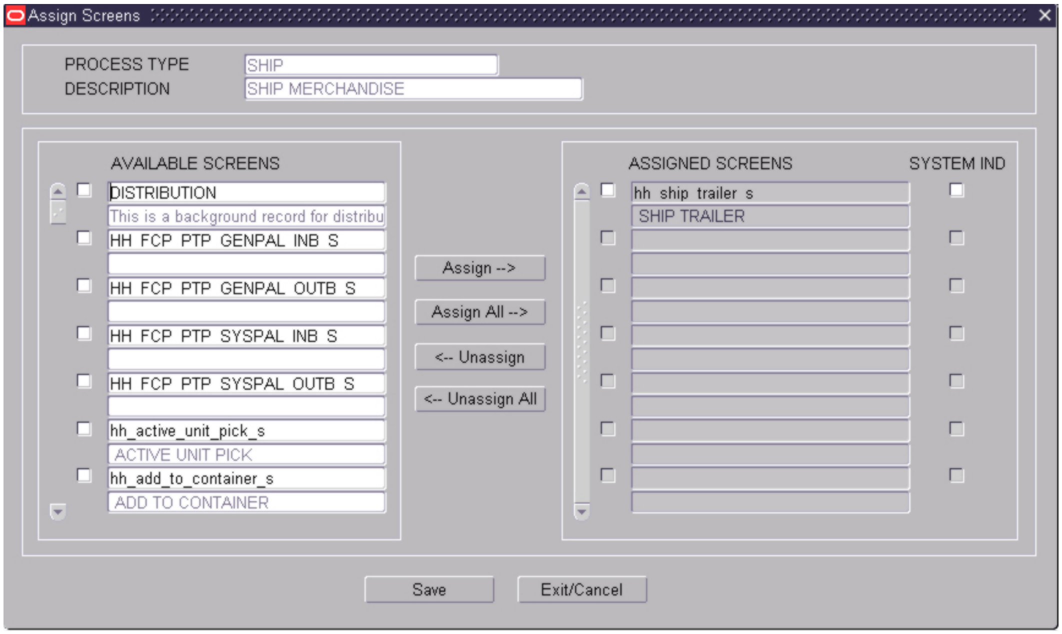

**Assign Presentation Types Window**

3. To assign presentation types:
   a. Select the check box next to the desired presentation types on the Available Pres Types table.
   b. Click **Assign**. The selected presentation types are moved to the Assigned Pres Types table.
4. To remove assigned presentation types:
   a. Select the check box next to the desired presentation types on the Assigned Pres Types table.
   b. Click **Unassign**. The selected presentation types are moved to the Available Pres Types table.
5. To prevent users from removing an assigned presentation type, select the System Ind check box next to the appropriate presentation types in the Assigned Pres Types table.
6. Click **Save** to save any changes and close the Assign Presentation Types window.

> **Note:** In the Assign Presentation Types window, you can 1) click **Assign All** to move all presentation types to the Assigned Pres Types table or 2) click **Unassign All** to move all presentation types to the Available Pres Types table. All presentation types are moved whether or not the check boxes are selected.

## Assign RF Screens to a Process Type

1. On the Process Type Editor window, select the process type that you want to edit.
2. Click **Assign Screens**. The Assign Screens window opens.




**Assign Screens Window**

3. To assign screens:
   a. Select the check box next to the desired screens on the Available Screens table.
   b. Click **Assign**. The selected screens are moved to the Assigned Screens table.
4. To remove assigned screens:
   a. Select the check box next to the desired screens on the Assigned Screens table.
   b. Click **Unassign**. The selected screens are moved to the Available Screens table.
5. To prevent users from removing an assigned screen, select the System Ind check box next to the appropriate screens in the Assigned Screens table.
6. Click **Save** to save any changes and close the Assign Screens window.

> **Note:** In the Assign Screens window, you can 1) click **Assign All** to move all screens to the Assigned Screens table or 2) click **Unassign All** to move all screens to the Available Screens table. All screens are moved whether or not the check boxes are selected.

## Delete a Process Type

1. On the Process Type Editor window, select the process type that you want to delete.

> **Note:** You can not delete a process type if the system indicator is selected or if any presentation types or screens have been assigned to the process type.

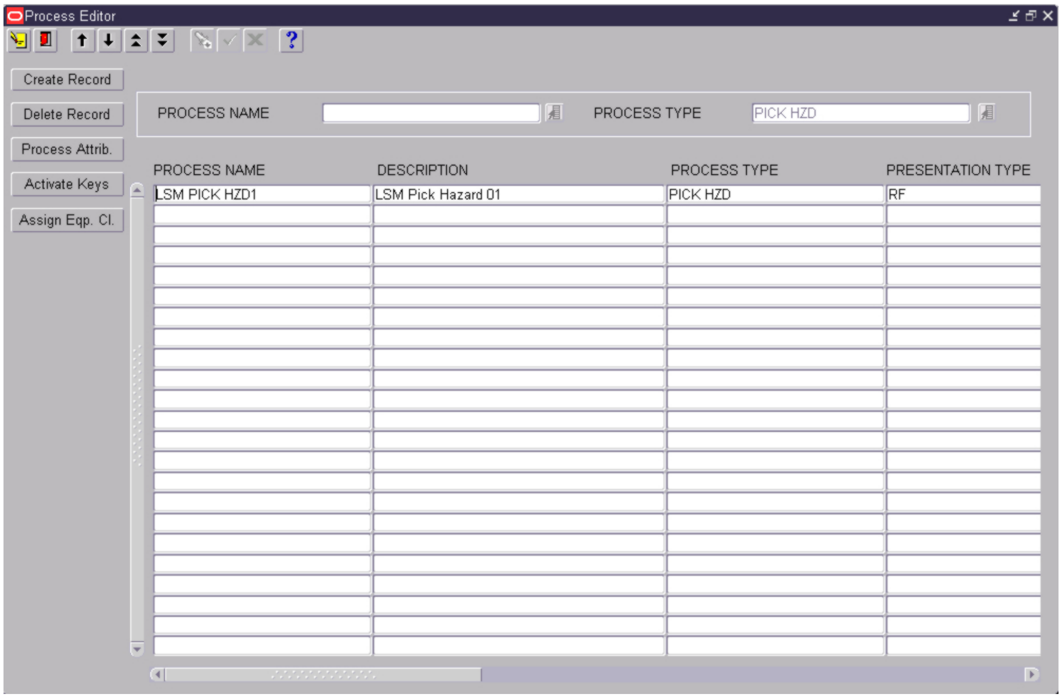
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Process Type Editor Window

- Click the exit button to close the window.

## Maintain Processes

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Process Editor. The Process Editor window opens.




**Process Editor Window**

### Display All Processes

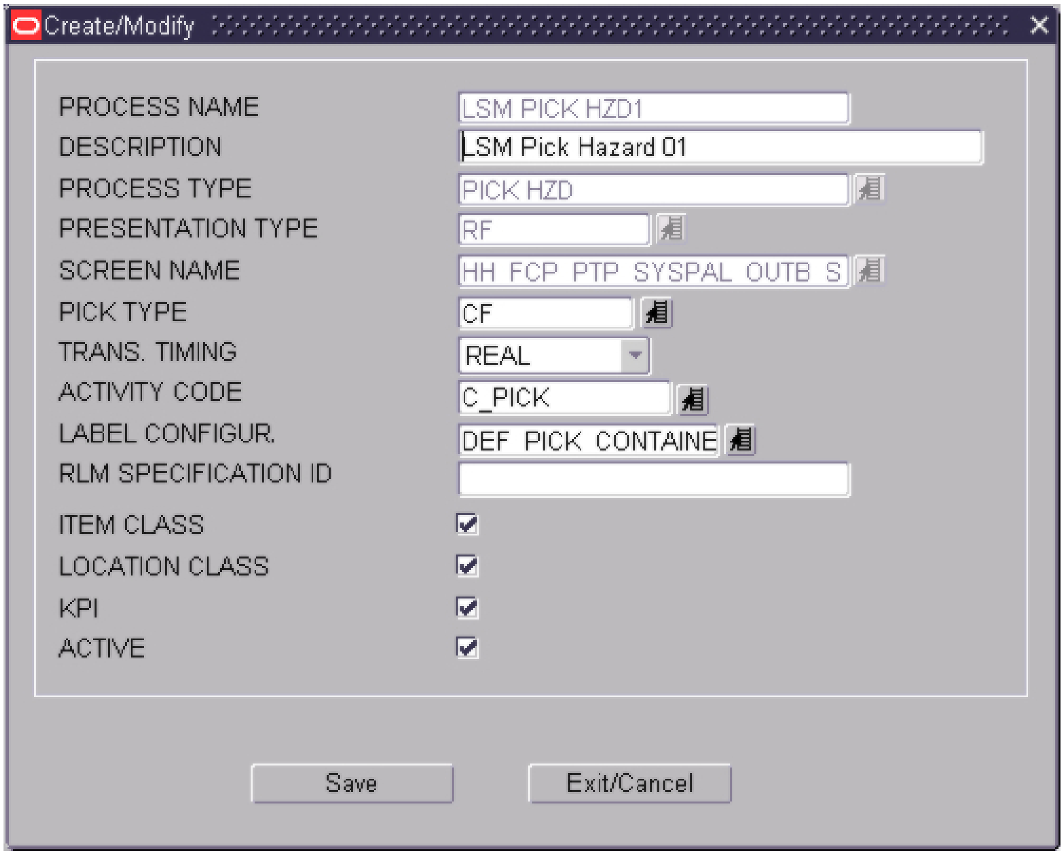
- Click the execute query button.

### Display a Subset of Processes

1. If any processes are currently displayed, click the clear button.
2. Click the enter query button.
3. To search for a single process, enter the name of the process in the Process Name query field, or click the LOV button and select the process.
   To search for processes of the same type, enter the name of the process type in the Process Type query field, or click the LOV button and select the process type.
4. Click the execute query button. The processes that match the search criterion appear.

### Edit a Process

1. On the Process Editor window, double-click the process that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

> **Note:** You can not edit a process if the system indicator is selected.

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

## Add a Process

1. On the Process Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Process and Description fields, enter a name and description for the process.
3. In the Process Type field, enter the name of the process type, or click the LOV  button and select the process type.

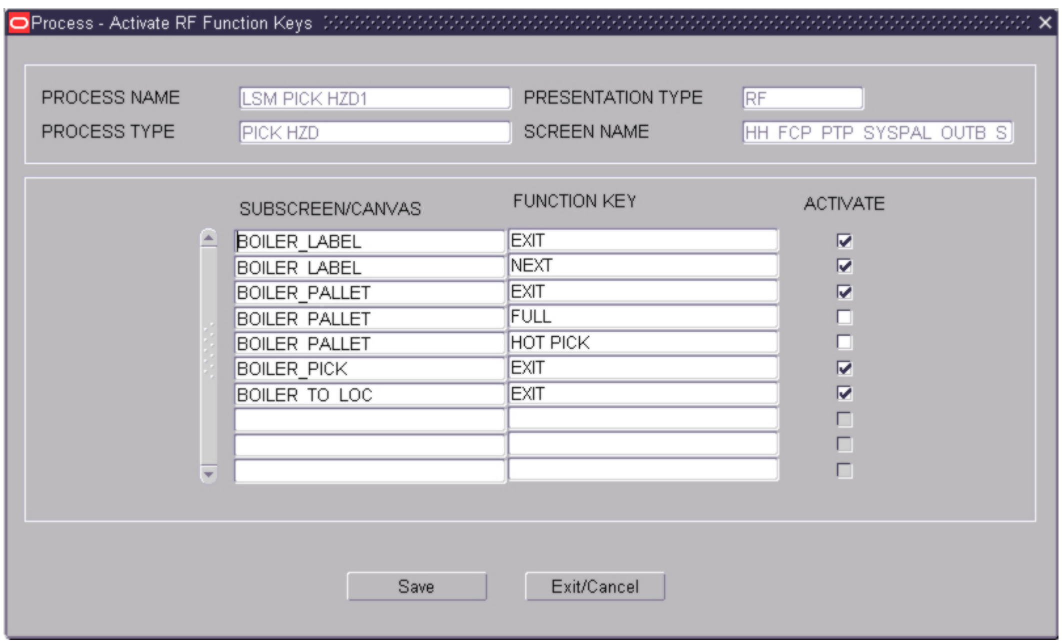
> **Note:** The choice of presentation types, RF screens, and transaction timing options is limited to those that were assigned to the selected process type.

4. Select the appropriate presentation type, screen name, transaction timing option in the appropriate fields.

5. If the process pertains to a picking transaction, enter the ID of the pick type in the Pick Type field, or click the LOV button and select type pick type.
6. In the Activity Code field, enter the ID of the activity whose service standards should be associated with the process, or click the LOV button and select the activity.
7. In the Label Configur field, enter the name of the label configuration should labels need to be printed, or click the LOV button and select the label configuration.
8. In the RLM Specification ID field, enter the ID of the process specification from Oracle Retail Labor Management that you want to associate with the process.
9. To make the process available to item classes and location classes and to mark the process as a key performance indicator (KPI), select the appropriate check boxes.
10. To make the process available to users, select the Active check box.
11. Click **Save** to save the changes and close the Create/Modify window.

### Activate RF Function Keys

1. On the Process Editor window, select the process hat you want to edit.
2. Click **Activate Keys**. The existing keys for the RF screen that is associated with the process appear in the Process - Activate RF Function Keys window.

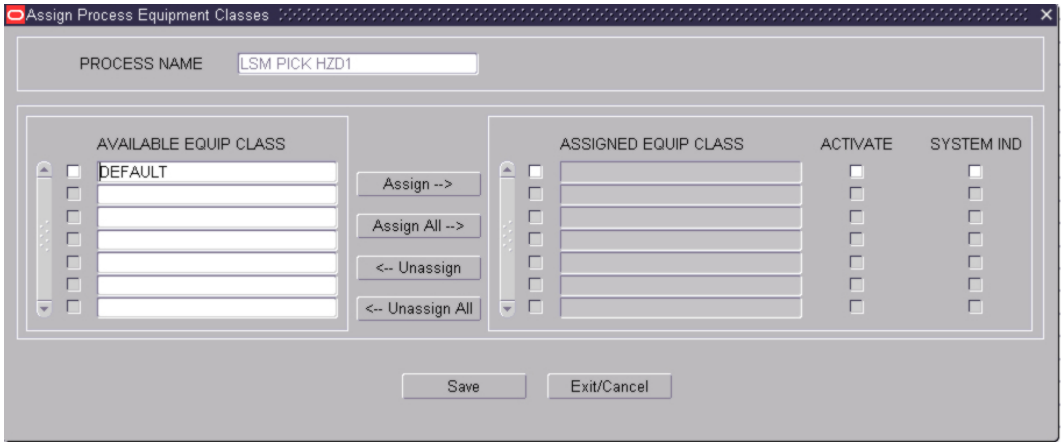



**Process - Activate RF Function Keys Window**

3. Select the Activate check box next to each function key that you want to make available to the user.
4. Click **Save** to save any changes and close the Process - Activate RF Function Keys window.

### Assign Equipment Classes to the Process

1. On the Process Editor window, select the process that you want to edit.
2. Click **Assign Eqp Cl**. The Assign Process Equipment Classes window opens.




**Assign Process Equipment Classes Window**

3. To assign equipment classes:
   a. Select the check box next to the desired equipment classes on the Available Equip Class table.
   b. Click **Assign**. The selected equipment classes are moved to the Assigned Equip Class table.
4. To remove assigned equipment classes:
   a. Select the check box next to the desired equipment classes on the Assigned Equip Class table.
   b. Click **Unassign**. The selected equipment classes are moved to the Available Equip Class table.
5. To make the equipment classes available to users, select the check box next to the appropriate equipment classes in the Assigned Equip Class table.
6. To prevent users from removing an assigned equipment class, select the System Ind check box next to the appropriate equipment classes in the Assigned Equip Class table.
7. Click **Save** to save any changes and close the Assign Process Equipment Classes window.

**Note:** In the Assign Process Equipment Classes window, you can 1) click **Assign All** to move all equipment classes to the Assigned Equip Class table or 2) click **Unassign All** to move all equipment classes to the Available Equip Class table. All equipment classes are moved whether or not the check boxes are selected.

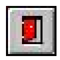
### Delete a Process

1. On the Process Editor window, select the process that you want to delete.

> **Note:** You can not delete a process if the system indicator is selected or if any equipment classes have been assigned to the process.

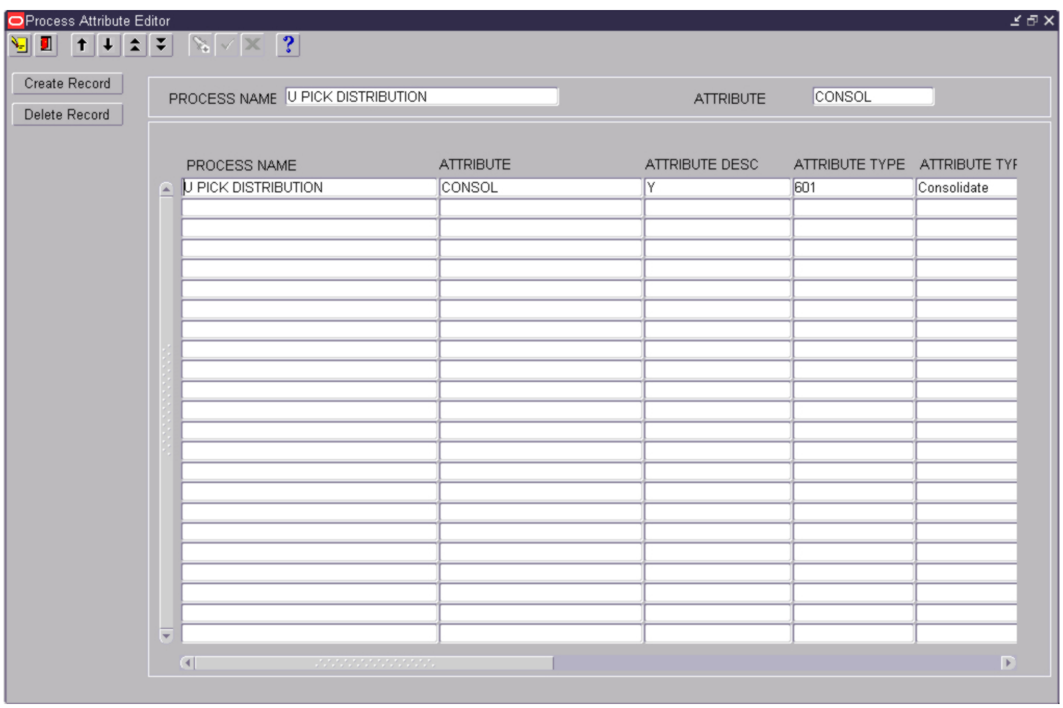
2. To delete the equipment classes from a process:
   a. Click **Assign Eqp Cl**. The Assign Equipment Classes window opens.
   b. Place the cursor in the Assigned Equip Class table.
   c. Click **Unassign All**. The equipment classes are moved to the Available Equip Classes table.
   d. Click **Save** to save the changes and close the Assign Equipment Classes window.
3. Click **Delete Record**.
4. When prompted to delete the record, click **Yes**.

### Exit the Process Editor Window

- Click the exit  button to close the window.

## Maintain Process Attributes

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Process Attribute Editor. The Process Attribute Editor window opens.




**Process Attribute Editor Window**

> **Note:** You can also access this window from the Process Editor window.

### Display All Process Attributes

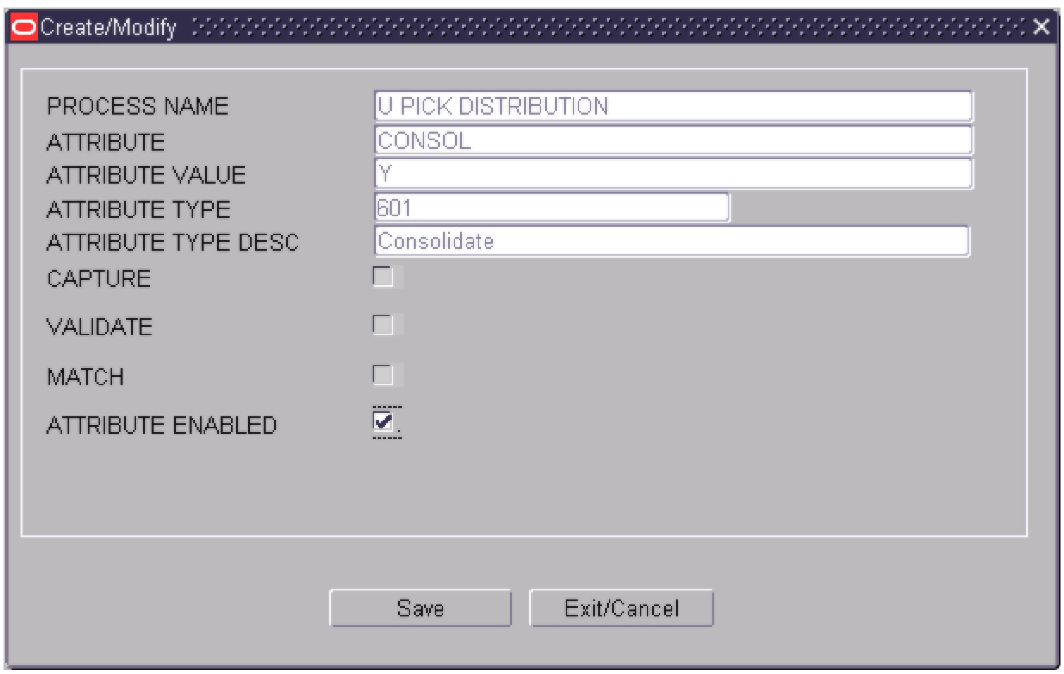
- Click the execute query button.

### Display a Subset of Process Attributes

1. If any process attributes are currently displayed, click the clear button.
2. Click the enter query button.
3. To search for a single process attribute, enter the ID of the process attribute in the Attribute query field, or click the LOV button and select the process attribute.
   To search for process attributes by process, enter the name of the process in the Process Name query field, or click the LOV button and select the process.
4. Click the execute query button. The process attributes that match the search criterion appear.

### Edit a Process Attribute

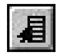
1. On the Process Attribute Editor window, double-click the process attribute that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Select or clear the Attribute Enabled check box as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Assign an Attribute to a Process

1. On the Process Attribute Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Attribute field, enter the ID of the attribute you want to associate with the current process, or click the LOV  button and select the attribute.

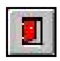
   > **Note:** If no process was identified on the Process Attribute Editor window, enter the name of the process in the Process Name field on the Create/Modify window.

3. To make the process attribute available to users, select the Attribute Enabled check box.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Process Attribute

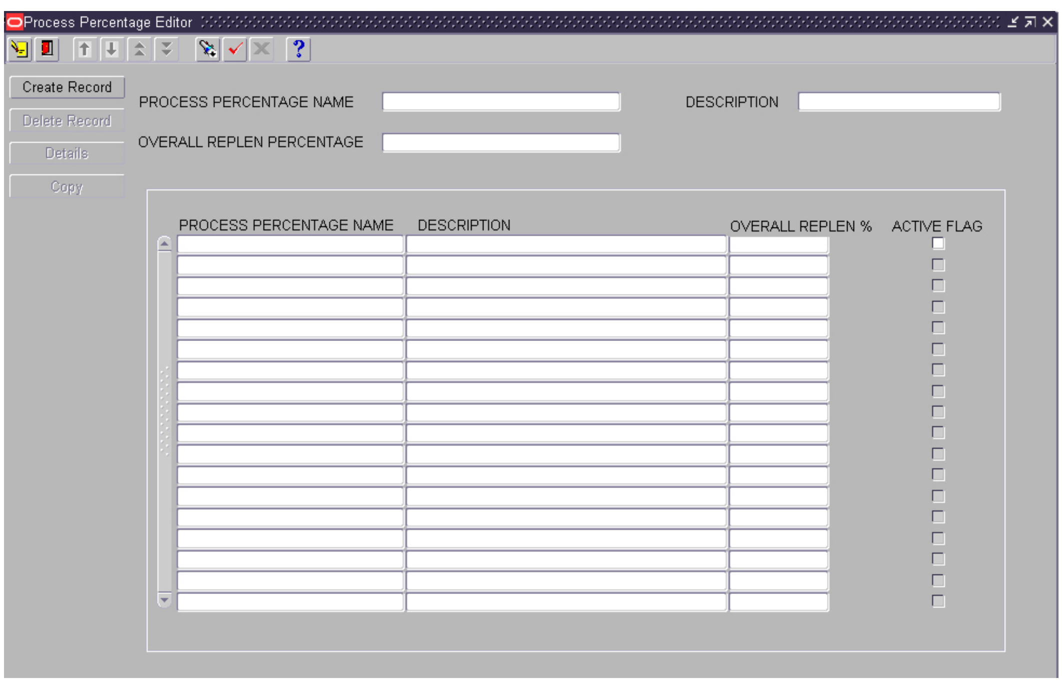
1. On the Process Attribute Editor window, select the attribute that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Process Attribute Editor Window

- Click the exit  button to close the window.

## Maintain Process Percentages

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Process Percentage Editor. The Process Percentage Editor window opens.




**Process Percentage Editor Window**

> **Note:** You can also access this window from the Distribution Planning > Select Stock Order menu. The Select Stock Order window opens. Click **Wave Preview**. The Wave Preview window opens. Click **Process Percentage Editor**. The Process Percentage Editor window opens.

### Display All Processes Percentages

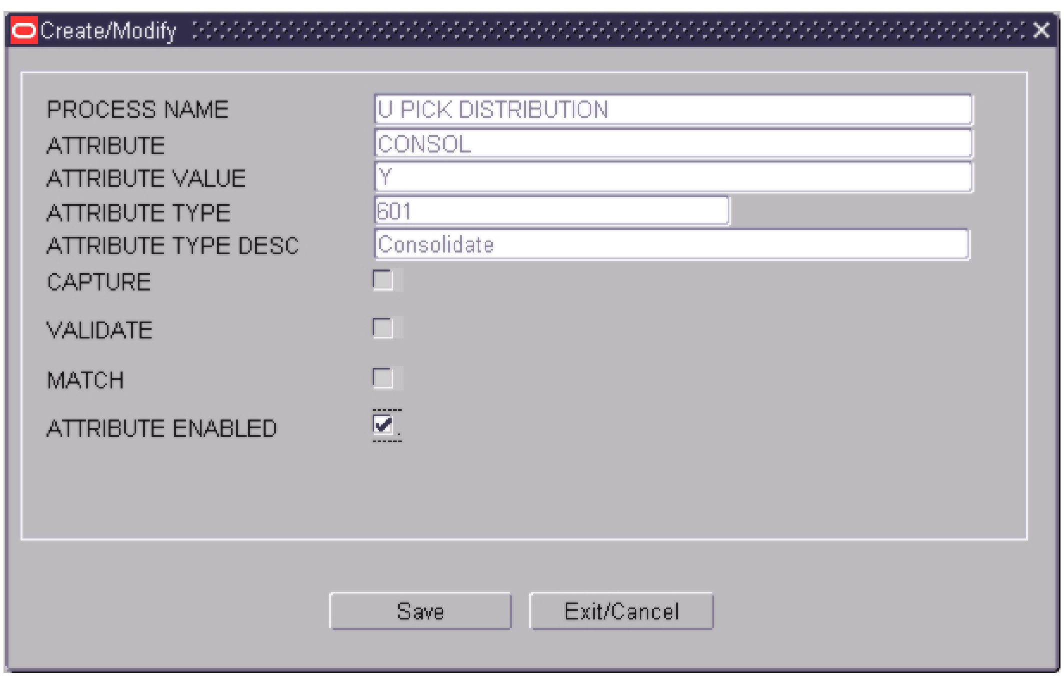
- Click the execute query button.

### Display a Subset of Processes Percentages

1. If any processes percentages are currently displayed, click the clear button.
2. Click the enter query button.
3. To search for a single process percentage, enter the name of the process percentage in the Process Percentage Name query field, or click the LOV button and select the process percentage.
   To search for processes by replenishment percentage, enter the name of the percentage amount in Overall Replen Percentage query field, or click the LOV button and select replenishment percentage.
4. Click the execute query button. The process percentages that match the search criterion appear.

### Edit a Process Percentage

1. On the Process Percentage Editor window, double-click the process percentage that you want to edit. The Create/Modify window opens.

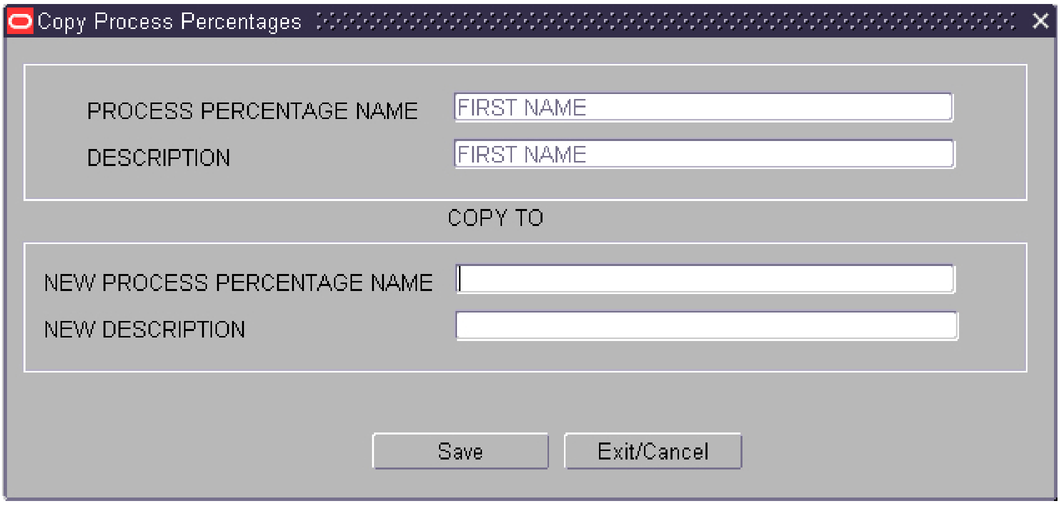



**Create/Modify Window**

2. Edit the enabled fields as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Copy a Process Percentage

1. On the Process Percentage Editor window, click **Copy**. The Copy Process Percentages window opens.




**Copy Process Percentages Window**

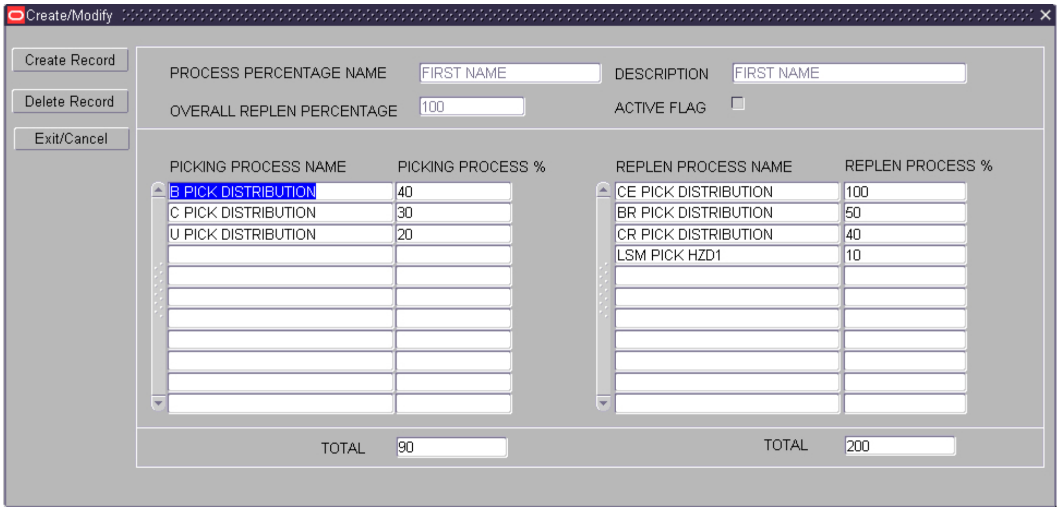
2. In the New Process Percentage Name field, enter the new process percentage name.
3. In the New Description field, enter the new description.
4. Click **Save** to save any changes and close the Copy Process Percentages window.

### Add a Process Percentage

1. On the Process Percentage Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Process Percentage Name and Description fields, enter a name and description for the process percentage.
3. In the Overall Replen Percentage field, enter the percentage that should be replenished in the wave.
4. Click **Save** to save any changes and close the Create/Modify window.

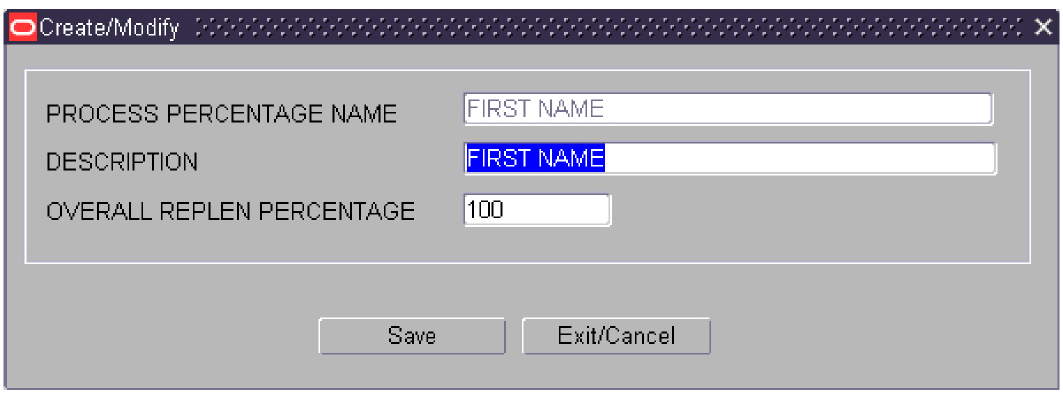
### Add Details to a Process Percentage

1. On the Process Percentage Editor window, select the process percentage you want to add details to.
2. Click **Details**. The Create/Modify window opens.




**Create/Modify Window**

3. To add a process to the process percentages:
   a. Click **Create Record**. The Create/Modify window opens.



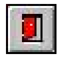

**Create/Modify Window**

   b. In the Process Name field, enter a process name, or click the LOV  button and select a process.
   c. In the Process Percent field, enter the percentage that is assigned to that process.
   d. Click **Save** to save any changes and close the Create/Modify window.
4. To delete a process from the process percentages:
   a. Place the cursor in the line you want to delete.
   b. Click **Delete Record**.
   c. When prompted to delete the record, click **Yes**.
5. Click **Exit/Cancel** to close the Create/Modify window.

### Delete a Process Percentage

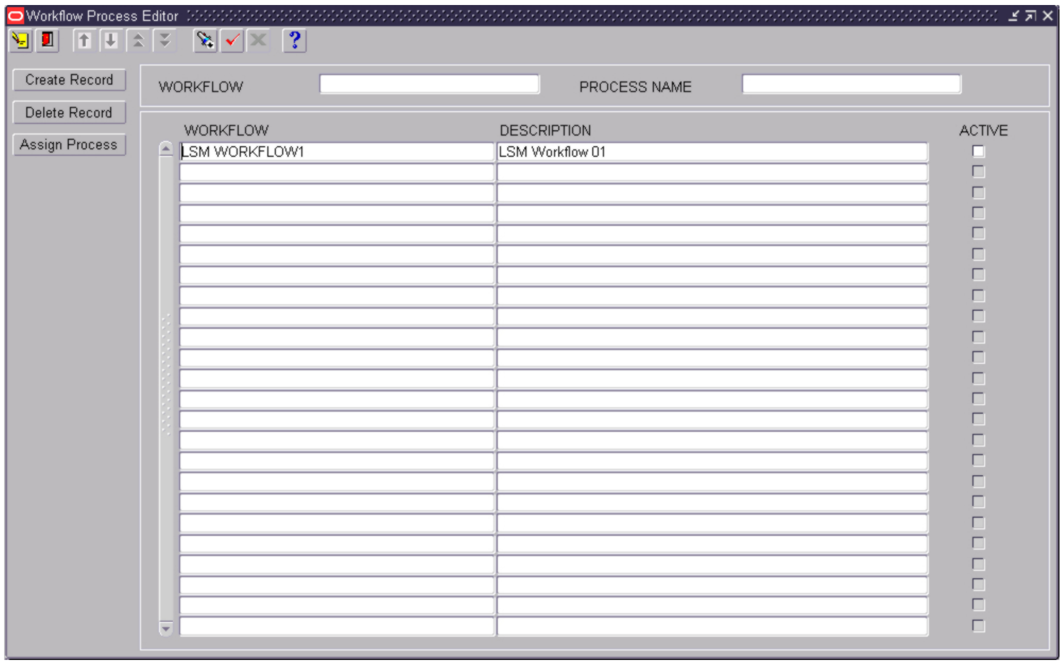
1. On the Process Percentage Editor window, select the process that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Process Percentage Editor Window

- Click the exit  button to close the window.

## Maintain Workflow Processes

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Workflow Process Editor. The Workflow Process Editor window opens.

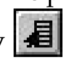



**Workflow Process Editor Window**

### Display All Workflows

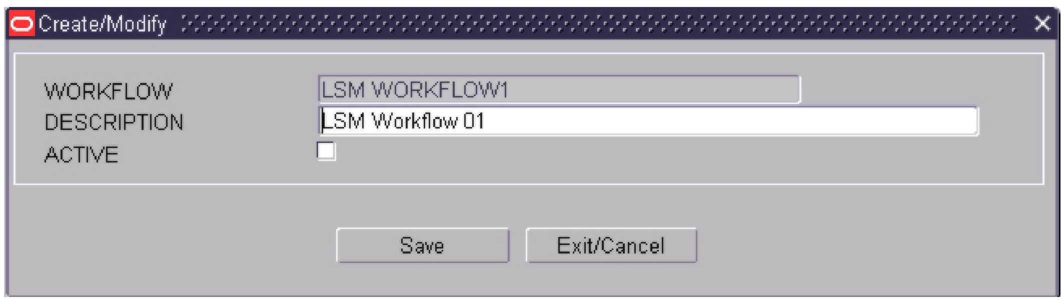
- Click the execute query  button.

### Display a Subset of Workflows

- If any workflows are currently displayed, click the clear  button.
- Click the enter query  button.
- To display a specific workflow record, enter the ID of the name of the workflow in the Workflow query field, or click the LOV  button and select the workflow.
  To display all workflows containing a specific process, enter the name of the process in the Process Name field, or click the LOV  button and select the process.
- Click the execute query  button. The workflows that match the search criterion appear.

### Edit a Workflow

1. On the Workflow Process Editor window, double-click the workflow that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

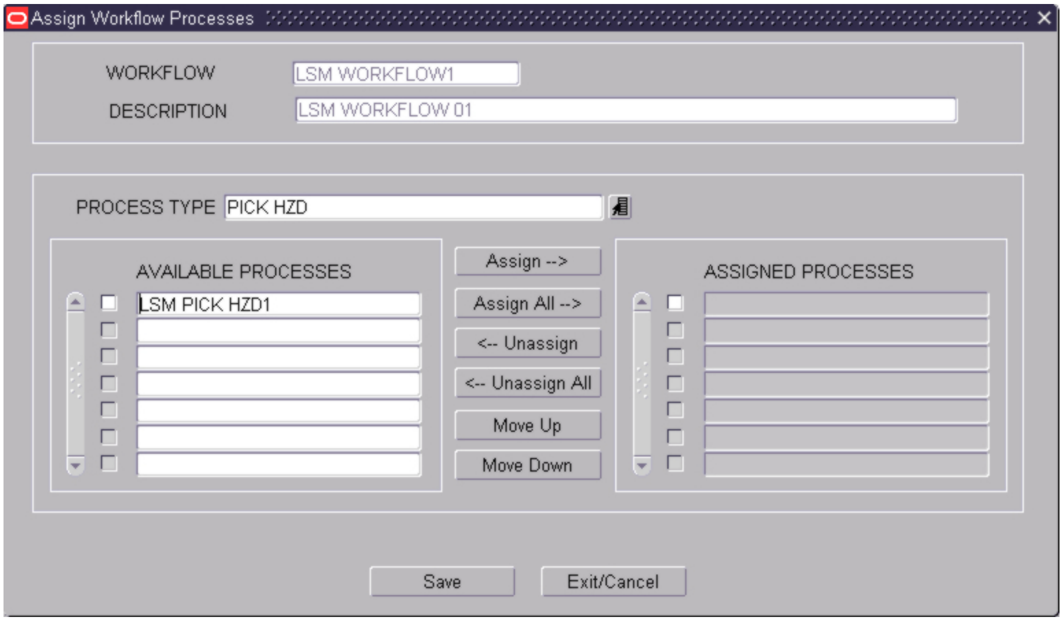
2. Edit the description and active option as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Workflow

1. On the Workflow Process Editor window, click **Create Record**. The Create/Modify window opens.
2. In the Workflow and Description fields, enter a name and description for the workflow.
3. To make the workflow available to users, select the Active check box.
4. Click **Save** to save the changes and close the Create/Modify window.

## Assign Processes to a Workflow

1. On the Workflow Process Editor window, select the workflow that you want to edit.
2. Click **Assign Process**. The Assign Workflow Processes window opens.




**Assign Workflow Processes Window**

3. [Optional] To filter the processes listed in the Available Processes table, enter the name of a process type in the Process Type field, or click the LOV  button and select the process type.
4. To assign processes:
   a. Select the check box next to the desired processes on the Available Processes table.
   b. Click **Assign**. The selected processes are moved to the Assigned Processes table.
5. To remove assigned processes:
   a. Select the check box next to the desired processes on the Assigned Processes table.
   b. Click **Unassign**. The selected processes are moved to the Available Processes table.
6. Click Save to save any changes and close the Assign Workflow Processes window.

> **Note:** In the Assign Workflow Processes window, you can 1) click **Assign All** to move all processes to the Assigned Processes table or 2) click **Unassign All** to move all processes to the Available Processes table. All processes are moved whether or not the check boxes are selected.

### Resequence the Processes in a Workflow

1. On the Workflow Process Editor window, select the workflow that you want to edit.
2. Click **Assign Process**. The available and assigned processes for the workflow appear in the Assign Workflow Processes window.
3. To resequence the assigned processes:
   a. Select the process to be moved.
   b. To move the process closer to the top of the list, click **Move Up**.
   c. To move the process closer to the bottom of the list, click **Move Down**.
4. Click Save to save any changes and close the Assign Workflow Processes window.

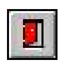
### Delete a Workflow

1. On the Workflow Process Editor window, select the workflow that you want to delete.

> **Note:** You can not delete a workflow if any processes are assigned to the workflow.

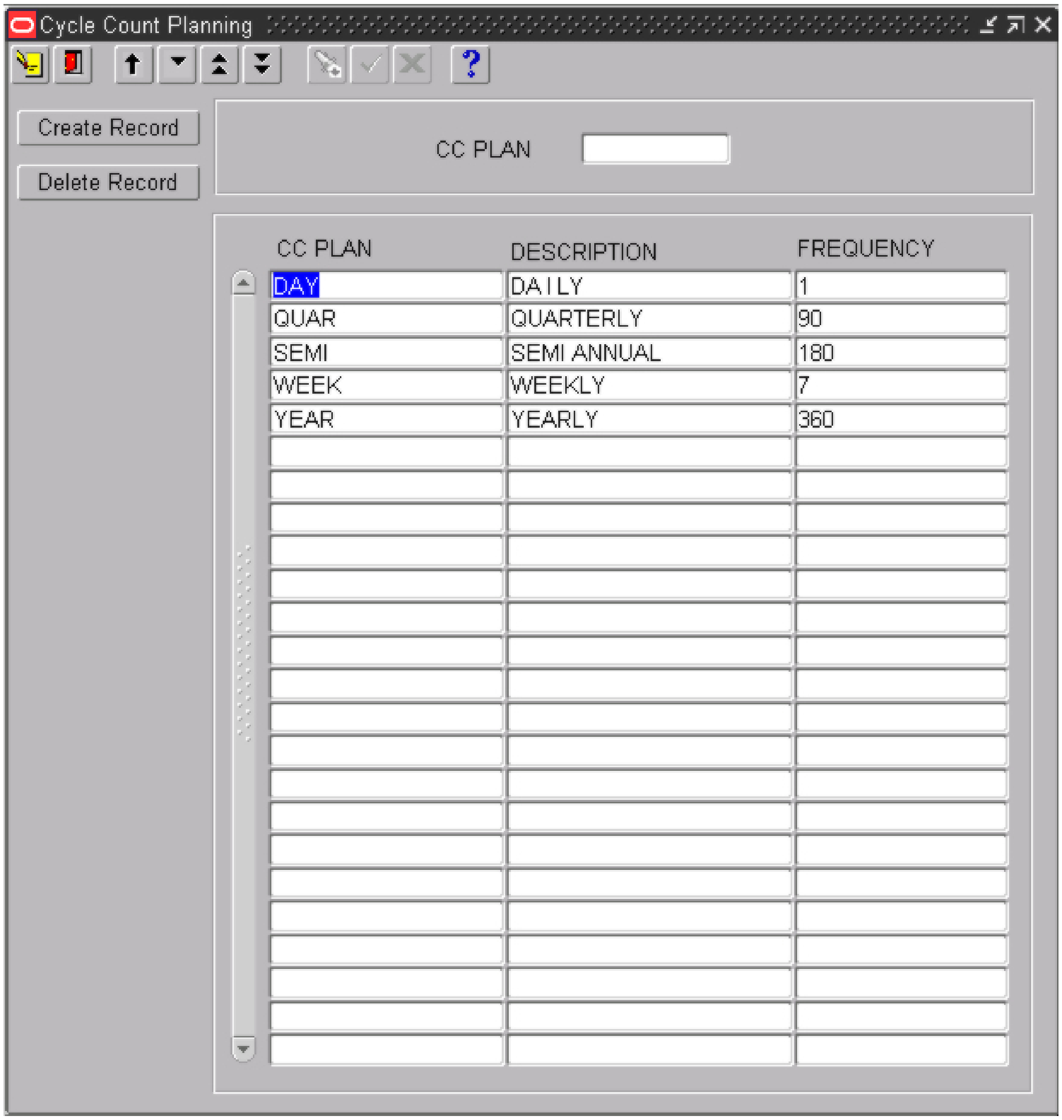
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Workflow Process Editor Window

- Click the exit  button to close the window.

## Maintain Cycle Count Plans

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Cycle Count Planning. The Cycle Count Planning window opens.




**Cycle Count Planning Window**

### Display All Plans

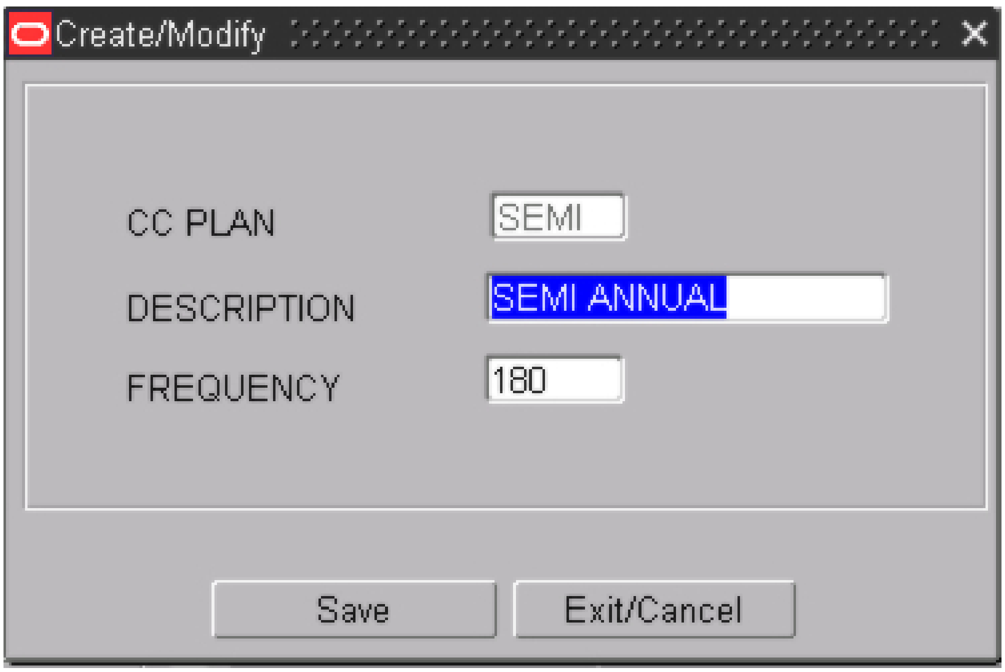
- Click the execute query  button.

### Display a Plan

- If any plans are currently displayed, click the clear button.
- Click the enter query button.
- In the CC Plan query field, enter all or part of the plan's name, or click the LOV button and select the plan.
- Click the execute query button. The plans that match the name or partial name appear.

### Edit a Plan

1. On the Cycle Count Planning window, double-click the plan that you want to edit. The Create/Modify window opens.




**Create/Modify Window**

2. Edit the description and frequency (in days) as necessary.
3. Click **Save** to save any changes and close the Create/Modify window.

### Add a Plan

1. On the Cycle Count Planning window, click **Create Record**. The Create/Modify window opens.
2. In the CC Plan and Description fields, enter the name and description of the plan.
3. In the Frequency field, enter how often, in days, that the cycle count must be performed.
4. Click **Save** to save the changes and close the Create/Modify window.

### Delete a Plan

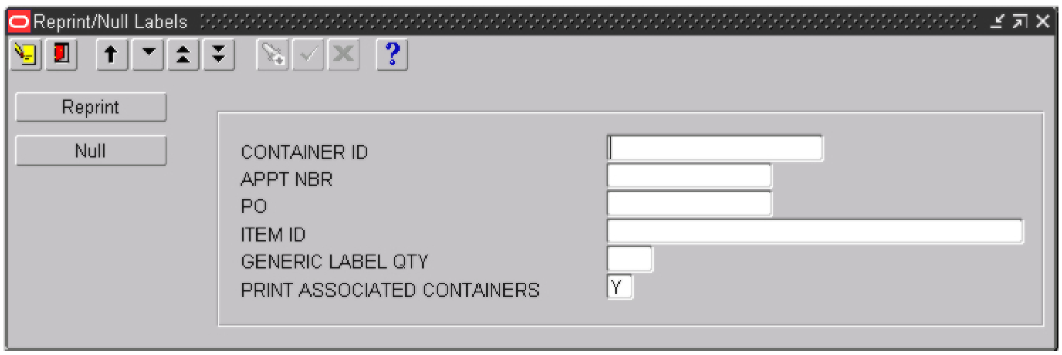
1. On the Cycle Count Planning window, select the plan that you want to delete.
2. Click **Delete Record**.
3. When prompted to delete the record, click **Yes**.

### Exit the Cycle Count Planning Window

- Click the exit button to close the window.

## Nullify Unused Labels

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Reprint/Null Labels. The Reprint/Null Labels window opens.

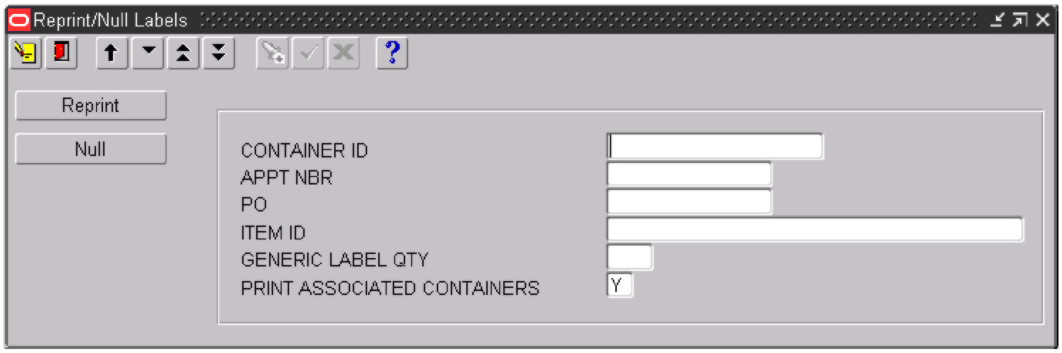



**Reprint/Null Labels Window**

- Enter the details for the type of label that you want to cancel:
  - Container: In the Container field, enter the ID of the container.
  - Appointment: In the Appointment Nbr field, enter the appointment number.
  - PO/line item: Enter the appointment number, purchase order number, and item number in the appropriate fields.
- Click **Null**.
- Click the exit button to close the Reprint/Null Labels window.

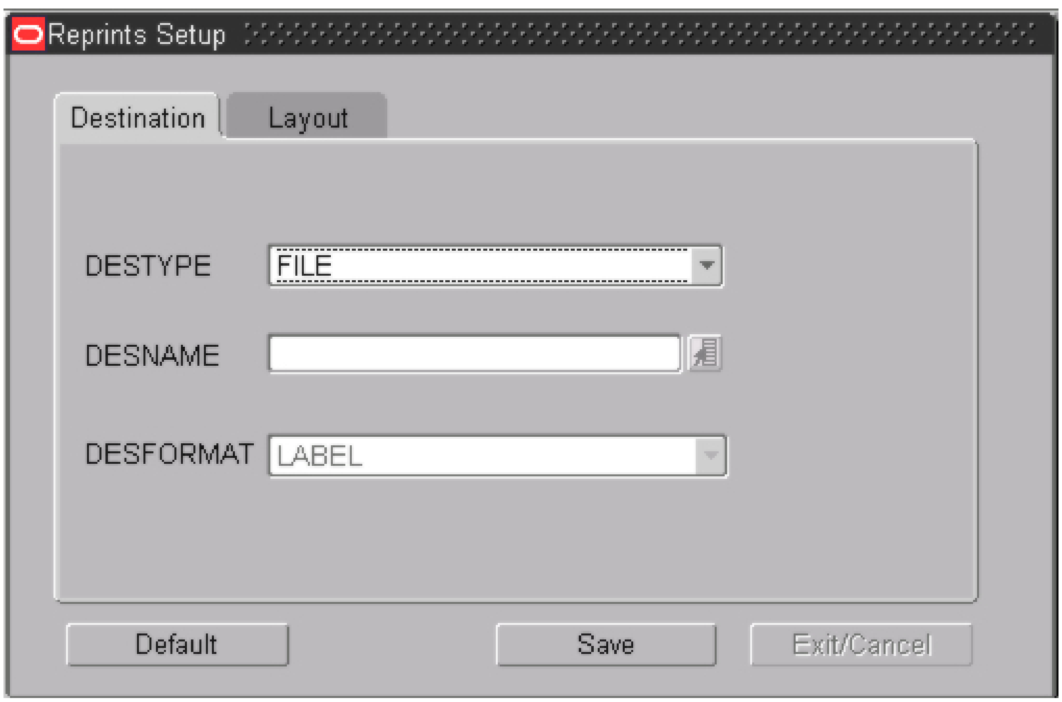
## Reprint Labels

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Reprint/Null Labels. The Reprint/Null Labels window opens.




**Reprint/Null Labels Window**

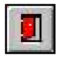
- In the Container ID field, enter the ID of the container.
- To reprint labels for the child containers of a master container, enter Y in the Print Associated Containers field.
- Click **Reprint**. The Reprints Setup window opens.




**Reprints Setup Window**

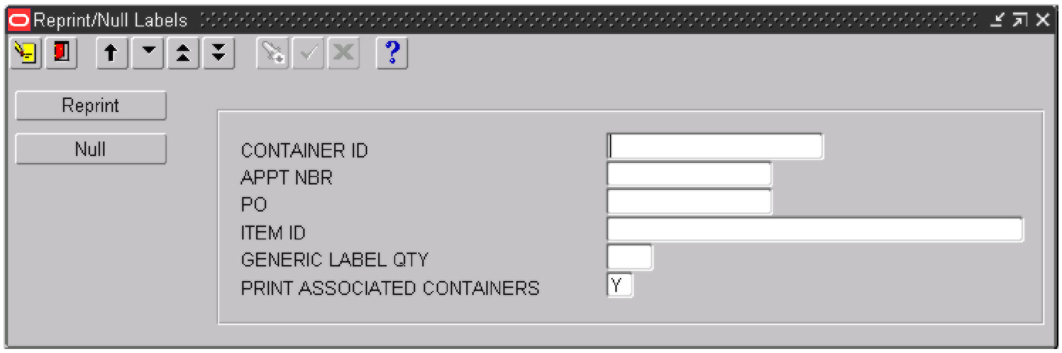
- In the Destype field, select the type of destination.
- In the Desname field, select the name of the destination.

**Note:** To return to the default settings, click **Default**.

- To view the layout of the report or labels, click on the Layout tab.
- Click **Save**. The labels are sent to selected destination.
- Click the exit  button to close the Reprint/Null Labels window.

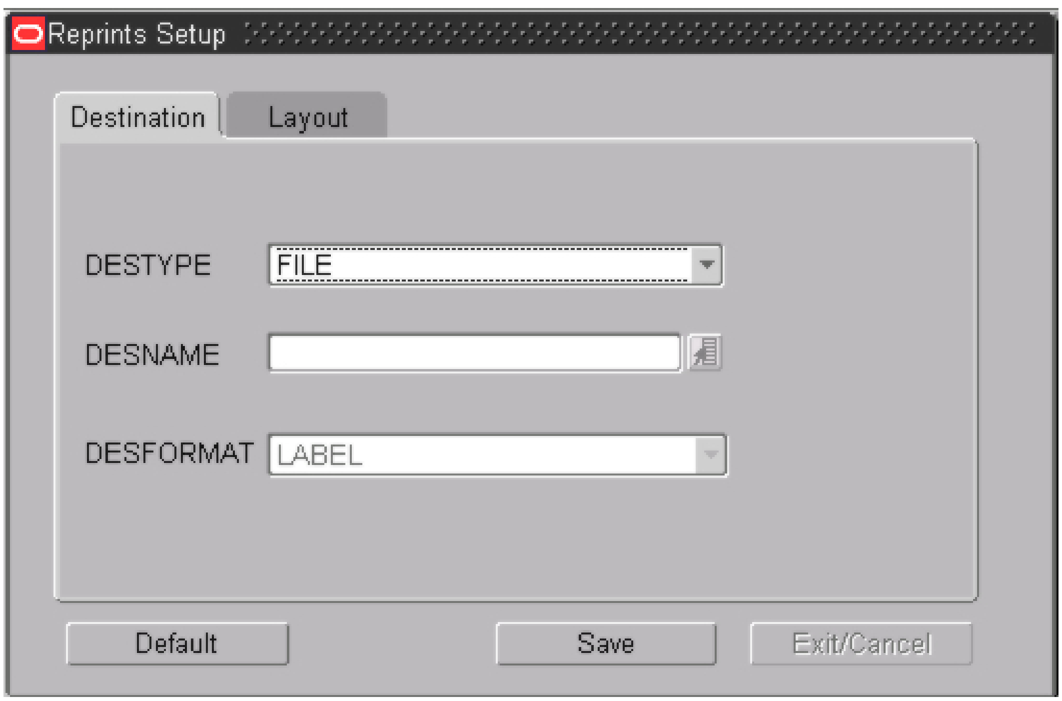
## Print Generic Labels

**Navigate:** From the main menu, select Support Functions > Processing/Returns Setup > Reprint/Null Labels. The Reprint/Null Labels window opens.




**Reprint/Null Labels Window**

- In Generic Label Qty field, enter the number of labels to be printed.
- Click **Reprint**. The Reprints Setup window opens.




**Reprints Setup Window**

- In the Destype field, select the type of destination.
- In the Desname field, select the name of the destination.

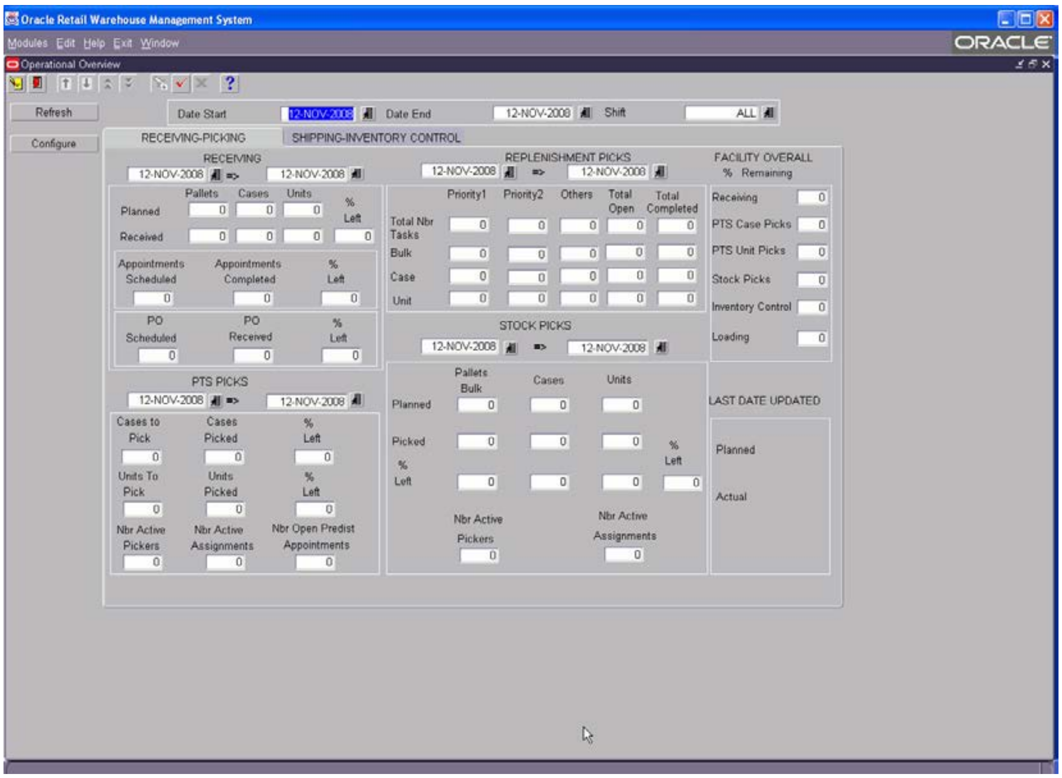
**Note:** To return to the default settings, click **Default**.

- To view the layout of the report or labels, click on the Layout tab.
- Click **Save**. The labels are sent to selected destination.
- Click the exit button to close the Reprint/Null Labels window..

# 12

# Operational Overview

This Operational Overview window allows the user to view the overall loads to be received, putaway, replenished, picked, and loaded. Click **Refresh** to update the fields to their current status.



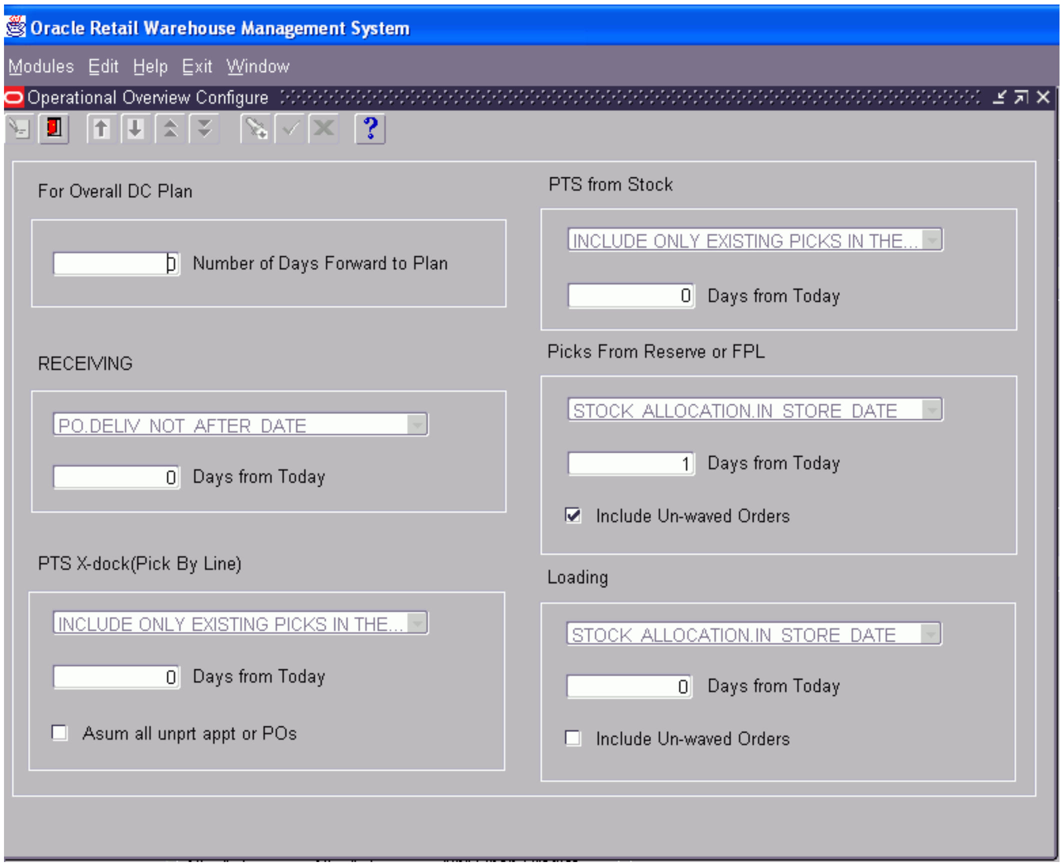

**Operational Overview window**

The screen displays relevant planned activity and actual work done.

- Select the Shipping/Inventory Control tab to display an optional view of the Operational Overview window.

# Maintain Configuration

**Navigate:** From the main menu, select Operational Overview. The Operational Overview window appears. Click the Configuration button. The Operational Overview Configure window appears.




**Operational Overview Configure window**

## Set Overall DC Plan/Number of Days Forward to Plan

A regular batch job is scheduled by the client's site administrator that runs at the beginning of each day to compute the expect plans for the current day and future days. This parameter controls how many future days are included.

## Receive Batch Jobs

1. Select the criteria by which future receipts are estimated.
2. Select how many days into the future to include for each run of the batch job.

## Set PTS X-dock

1. Select the appropriate criteria for determining how inbound merchandise will be handled.
2. Specify the number of days into the future to plan.
3. Select the check box to plan the calculations that all un-appointed POs will be processed through the unit picking system assigned to each item. (This selection is used by sites that run all cross-dock merchandise through a case put-to-store operation.)

## Set PTS from Stock

1. Select the appropriate criteria for determining which orders to include in planning for the day. If only orders assigned to waves should be included, that option is available in the selection list.
2. Select the number of days into the future to plan.

## Set Picks from Reserve or FPL

1. Select the appropriate criteria for determining which orders to include in planning for the day. If only orders assigned to waves should be included, that option is available in the selection list.
2. Select the number of days into the future to plan. If orders not yet waved should be included, place a check in the appropriate box.

## Set Loading

1. Select the appropriate criteria for determining which orders will be loaded each day.
2. Select the number of days into the future to plan. If orders not yet waved should be included, place a check in the appropriate box.

# 13

# Acronyms

| Acronym | Term |
|---|---|
| DC | Distribution Center |
| FCP | Forward Case Pick |
| FCPL | Forward Case Pick Location |
| FPL | Forward Pick Location |
| KPI | Key Performance Indicator |
| LMS | Labor Management System, also referred to as Oracle Retail Labor Management |
| LTC | Less Than Case |
| PF&D | Personal Fatigue and Delay |
| PO | Purchase Order |
| PRO | Progressive Rotating Order |
| PTS | Put to Store |
| RWMS | Oracle Retail Warehouse Management System |
| RF | Radio Frequency |
| RLM | Oracle Retail Labor Management, also referred to as Labor Management System. |
| ROP | Re-order Point |
| SCP | System Control Parameter |
| TM | Truck-mounted |
| UPC | Universal Product Code |
| UPS | Unit Pick System |
| WIP | Work in Process |
| WMS | Warehouse Management System |

# Index