Oracle® Shipping Execution

User's Guide, Release 11i

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Oracle® Shipping Execution User's Guide, Release 11i

Part No. A77030-01

Primary Author: John Salvini

Contributing Authors: Vijay Albuquerque, Michael Cummings, Anish Desai, Kevin Hamant, Monica Loomis, Mary Jo Sparry, Paul Willner

Contributors: David Reitan

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- FAX - (650) 506-7200. Attn: Oracle Shipping Execution User's Guide
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If you would like a reply, please give your name, address, and telephone number below.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

Welcome to Release 11i of the Oracle Shipping Execution User Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User Guide.*

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Oracle Shipping Execution.

This preface explains how this user guide is organized and introduces other sources of information that can help you. This guide contains the following chapters:

- Chapter 1 describes how to set up default shipping parameters for Shipping Execution.

  Note: Implementation information and procedures are contained in this chapter.

- Chapter 2 provides you with an overview of Shipping Execution and the Shipping Transactions window--a centralized workbench for performing shipping transactions.
- Chapter 3 provides you with an overview of the Query Manager--a query management and search tool you can use to find trips, deliveries, containers, and delivery lines.
- Chapter 4 describes how to use the Shipping Transaction window to plan trips, tender loads, confirm shipments (trips, stops, and deliveries), view shipping information, track freight costs, and create Intrastat and Extrastat movement statistics declarations to European Union (EU) government authorities.
- Chapter 5 describes how to create, sequence, assign, modify, cancel, plan, unplan, reopen, and ship confirm deliveries.
- Chapter 6 describes how to create and manage containers and delivery lines and pack multiple containers with multiple lines.
- Chapter 7 describes how to pick release orders by order, outstanding invoice value, schedule or departure dates, shipment priority or combinations of the above criteria.
- Chapter 8 provides you with a variety of flexible and easy-to-use reports to help you improve productivity and increase control.
- The appendices provide you with complete navigation paths to all windows in Shipping Execution, information on item attributes, and a description of the flexfields that Shipping Execution uses.

Finding Out What's New

From the HTML help window for Oracle Shipping Execution, choose the section that describes new features or what's new from the expandable menu. This section describes:

- New features in 11*i*. This information is updated for each new release of Oracle Shipping Execution.
- Information about any features that were not yet available when this user guide was printed. For example, if your system administrator has installed software from a mini pack as an upgrade, this document describes the new features.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Shipping Execution.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides unless we specify otherwise.

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF). The technical reference guides are available in paper format only. Note that the HTML documentation is translated into over twenty languages.

The HTML version of this guide is optimized for onscreen reading, and you can use it to follow hypertext links for easy access to other HTML guides in the library. When you have an HTML window open, you can use the features on the left side of the window to navigate freely throughout all Oracle Applications documentation.

- You can use the Search feature to search by words or phrases.
- You can use the expandable menu to search for topics in the menu structure we provide. The Library option on the menu expands to show all Oracle Applications HTML documentation.

You can view HTML help in the following ways:

- From an application window, use the help icon or the help menu to open a new Web browser and display help about that window.
- Use the documentation CD.
- Use a URL provided by your system administrator.

Your HTML help may contain information that was not available when this guide was printed.

Related User Guides

Oracle Shipping Execution shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle Shipping Execution.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document

Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

User Guides Related to All Products

Oracle Applications User Guide

This guide explains how to navigate the system, enter data, and query information, and introduces other basic features of the GUI available with this release of Oracle Shipping Execution (and any other Oracle Applications product).

You can also access this user guide online by choosing *Getting Started and Using Oracle Applications* from the Oracle Applications help system.

Oracle Alert User Guide

Use this guide to define periodic and event alerts that monitor the status of your Oracle Applications data.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards*. It also provides information to help you build your custom Oracle Developer forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Installation and System Administration Guides

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind, and major issues, for Applications-wide features such as Business Intelligence (BIS), languages and character sets, and self-service applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle One-Hour Install, which minimizes the time it takes to install Oracle Applications and the Oracle 8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle One-Hour Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process in general and lists database upgrade and product-specific upgrade tasks. You must be at either Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0 to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Using the AD Utilities

Use this guide to help you run the various AD utilities, such as AutoInstall, AutoPatch, AD Administration, AD Controller, Relink, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities.

Oracle Applications Product Update Notes

Use this guide as a reference if you are responsible for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new

features and enhancements and changes made to database objects, profile options, and seed data for this interval.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Training and Support

Training

We offer a complete set of training courses to help you and your staff master Oracle Applications. We can help you develop a training plan that provides thorough training for both your project team and your end users. We will work with you to organize courses appropriate to your job or area of responsibility.

Training professionals can show you how to plan your training throughout the implementation process so that the right amount of information is delivered to key people when they need it the most. You can attend courses at any one of our many Educational Centers, or you can arrange for our trainers to teach at your facility. We also offer Net classes, where training is delivered over the Internet, and many multimedia-based courses on CD. In addition, we can tailor standard courses or develop custom courses to meet your needs.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Shipping Execution working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

We STRONGLY RECOMMEND that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications tables, unless we tell you to do so in our guides.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications forms, you might change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications forms to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. But, if you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support and office automation, as well as Oracle Applications. Oracle Applications provides the E-business Suite, a fully integrated suite of more than 70 software modules for financial management, Internet procurement, business intelligence, supply chain management, manufacturing, project systems, human resources and sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers, and personal digital assistants, enabling organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools,

and application products, along with related consulting, education and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Oracle Shipping Execution and this user guide.

We value your comments and feedback. This guide contains a Reader's Comment Form you can use to explain what you like or dislike about Oracle Shipping Execution or this user guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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U.S.A.

Or, send electronic mail to **appsdoc@us.oracle.com**.

1

Setting Up

This chapter tells you everything you need to know about setting up Oracle Shipping Execution, including:

- Related Product Setup Steps
- Setup Flowchart

Overview of Setting Up

This chapter tells you how to set up Oracle Shipping Execution so you can begin processing shipping information. You can set up information about shipping parameters, calendars, pick slip rules, container item relationships, suppliers (freight carriers), and document printing.

Oracle Applications Implementation Wizard

If you are implementing more than one Oracle Applications product, it is recommended that you use the Oracle Applications Implementation Wizard (AIW) to coordinate your setup activities. The Wizard guides you through the setup steps for the applications you have installed, suggesting a logical sequence that satisfies cross-product implementation dependencies and reduces redundant setup steps.

You can use the Wizard to see a graphical overview of setup steps, read online help for a setup activity, and open the appropriate setup window. You can also document your implementation, for further reference and review, by using the Wizard to record comments for each step.

See Also

Oracle Applications Implementation Wizard User's Guide

Related Product Setup Steps

Setup involves several phases, including setting up other integrated applications such as Oracle General Ledger, Oracle Receivables, Oracle Order Management, and Oracle Inventory. Some setup steps are optional depending on whether the integrating application is installed and whether you use the associated feature. For example, if your business supports drop shipments, you should also set up Oracle Purchasing.

Oracle Applications Technology

The Wizard guides you through the entire Oracle Applications setup, including system administration. However, if you do not use the Implementation Wizard, you need to complete several other setup steps, including:

- Performing system-wide setup tasks such as configuring concurrent managers and printers
- Managing data security, which includes setting up responsibilities to allow access to a specific set of business data and complete a specific set of transactions, and assigning individual users to one or more of these responsibilities
- Setting up Oracle Workflow

See Also

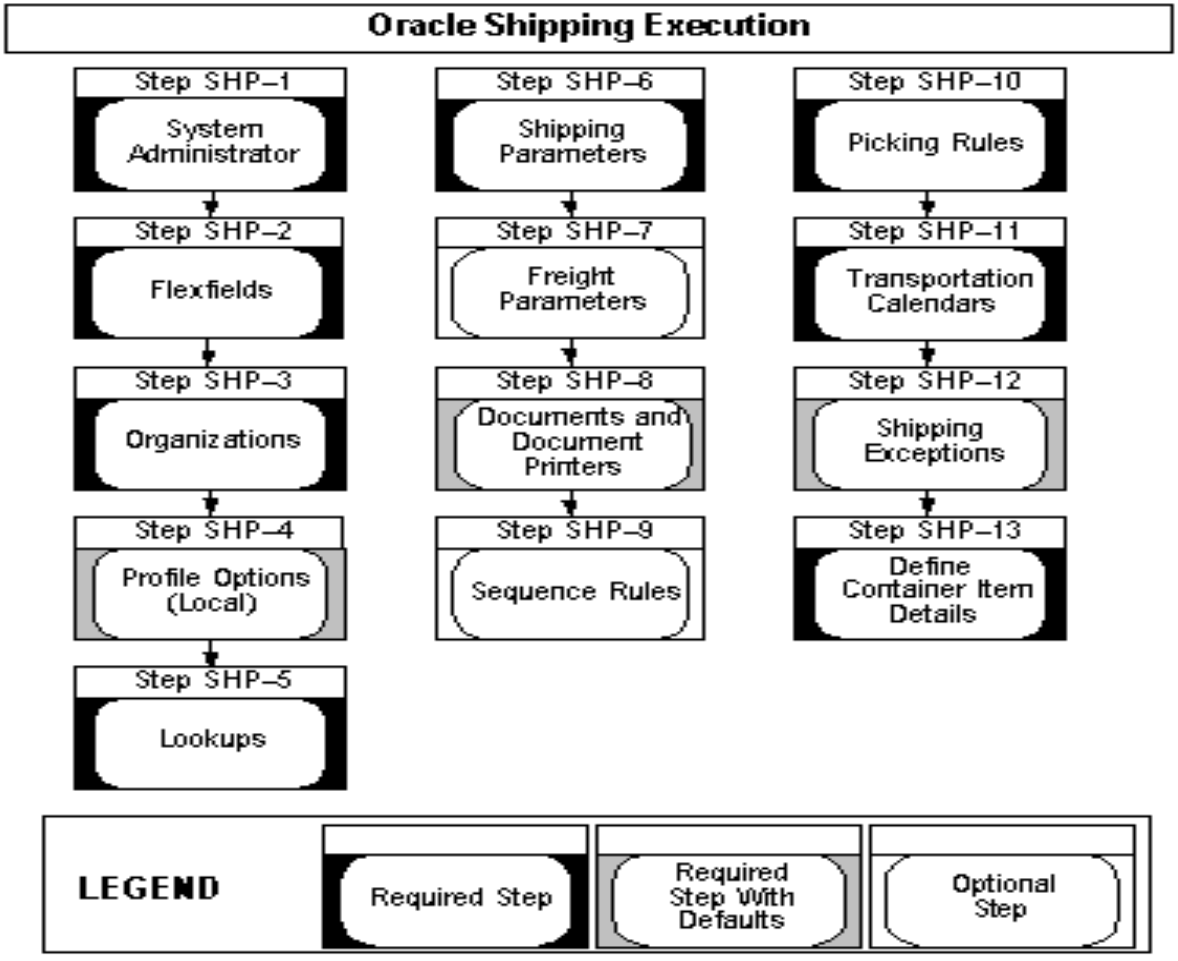
Oracle Applications Implementation Wizard User's Guide

Oracle Applications System Administrator's Guide

Oracle Workflow Guide

Setup Flowchart

Some of the steps outlined in this flowchart and setup checklist are Required and some are Optional. Required Step With Defaults refers to setup functionality that comes with pre-seeded, default values in the database; however, you should review those defaults and decide whether to change them to suit your business needs. If you want or need to change them, you should perform that setup step. You need to perform Optional steps only if you plan to use the related feature or complete certain business functions.



Setup Checklist

Complete the following steps, in the order shown, to set up Oracle Shipping Execution. The following table lists setup steps and a reference to their location within the Wizard. For a detailed description of AIW reference levels, see the *Oracle Applications Implementation Wizard User's Guide.*

	Step No.	Required	Step	AIW Reference
	Step 1	Required	Set up System Administrator	
	Step 2	Required	Set up Flexfields	
	Step 3	Required	Define Organization Parameters	
	Step 4	Required with Defaults	Define Profiles (Local)	
	Step 5	Required	Define Lookups	
	Step 6	Required	Define Shipping Parameters	
	Step 7	Required	Define Freight Parameters ■ Define Freight Carriers ■ Define Carrier Ship Methods ■ Define Freight Cost Types	
	Step 8	Required (if using document sets)	Define Documents ■ Define Document Sequences ■ Define Document Categories ■ Assign Document Sequences ■ Define Document Sets ■ Choose Printers	

	Step No.	Required	Step	AIW Reference
	Step 9	Required	Define Release Sequence Rules ■ Define Release Rules Form	
	Step 10	Optional	Define Pick Slip Grouping Rules	
	Step 11	Optional	Define Transportation Calendars	
	Step 12	Optional	Define Shipping Exceptions	
	Step 13	Optional	Define Container Item Details	

Setup Steps

Step 1: Set up System Administrator

This step involves the following tasks:

- Define responsibilities. See: *Oracle Applications System Administrator Guide.*
- Set up printers (optional). See Setting Up Your Printers, *Oracle Applications System Administrator Guide.*

Step 2: Set up Flexfields

Define key and descriptive flexfields to capture additional information about orders and transactions. See: *Oracle Application User's Guide.*

Step 3: Define Organization Parameters

Define inventory organizations (warehouses), organization parameters, subinventories, and picking rules in Oracle Inventory. See: *Oracle Inventory User's Guide*.

You must define at least one item validation organization and at least one organization that acts as an inventory source for orders fulfilled internally. If you plan to drop ship some orders, you must also define at least one logical organization for receiving purposes. Your item validation organization can be the same as your inventory source or your logical receiving organization, but you cannot use one organization for all three purposes.

Step 4: Define Profile Options (Local)

Define profile options to specify certain implementation parameters, processing options, and system options.

Step 5: Define Lookups

Define Lookups that provide custom values for many lists of values throughout Shipping Execution.

Step 6: Define Shipping Parameters

Define default Shipping Parameters. See: Defining Shipping Parameters, *Oracle Shipping Execution User's Guide.*

Step 7: Define Freight Parameters

Define freight costs and freight carriers to specify on orders. See: *Defining Freight Carriers* in *Shipping Execution User's Guide*.

Step 8: Define Documents

Define groups of shipping documents that print automatically to specified printers when you confirm shipments.

Step 9: Define Release Sequence Rules

Define the order in which picking lines are allocated to inventory. See: *Defining Release Sequence Rules* in *Shipping Execution User's Guide*.

Step 10: Define Pick Slip Grouping Rules

Define pick slip grouping rules to determine how released picking lines are grouped onto pick slips. See *Defining Pick Release Parameters*.

Step 11: Defining Transportation Calendars

Assign a calendar that you created in the Bill of Materials (BOM) application to a shipper, receiver, or carrier. See: *Bill of Materials User's Guide* and Defining Transportation Calendars, *Shipping Execution User's Guide*.

Step 12: Define Shipping Exceptions

You can define exceptions, define processes for exception handling and relate them to appropriate exceptions, log exceptions, associate status to exceptions at various stages in the logging and handling process, start exception handling, and view and track exceptions. See: Defining Shipping Exceptions, *Oracle Shipping Execution User's Guide*.

Step 13: Define Container Item Details

Define the relationship between container items and load items to specify which items can be contained with other items. See: Defining Container-Item Relationships, *Oracle Shipping Execution User's Guide*.

Defining Shipping Parameters

In the Shipping Parameters window, you can set up the default shipping parameters for each warehouse. The shipping parameters consist of the following sets of parameters that are displayed in the Shipping Transaction window:

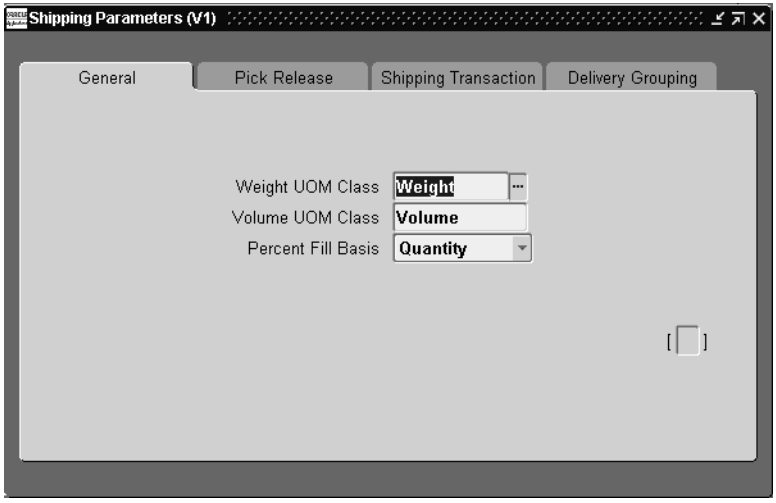
- *General Parameters:* You can define shipping units of measurement such as weight, volume, and the unit of measure used for percent fill basis calculations.
- *Pick Release Parameters:* You can define release rules, pick slip grouping rules, release sequence rules, and printing parameters.
- *Shipping Transaction Parameters:* You can define automatic or manual weight and volume calculations, container volume calculations, container inventory control, and goods dispatched (COGS) account.
- *Delivery Grouping Parameters:* You can define how to group delivery lines for a delivery.

Defining General Parameters

You can define unit of measurement (UOM) parameters such as weight and volume, and select the unit of measure used for percent fill basis calculations. The units of measurement you select as the default are used when you calculate the weight, volume, and fill percentage of a delivery.

◗ To define general parameters:

1. Navigate to the Shipping Parameters window.



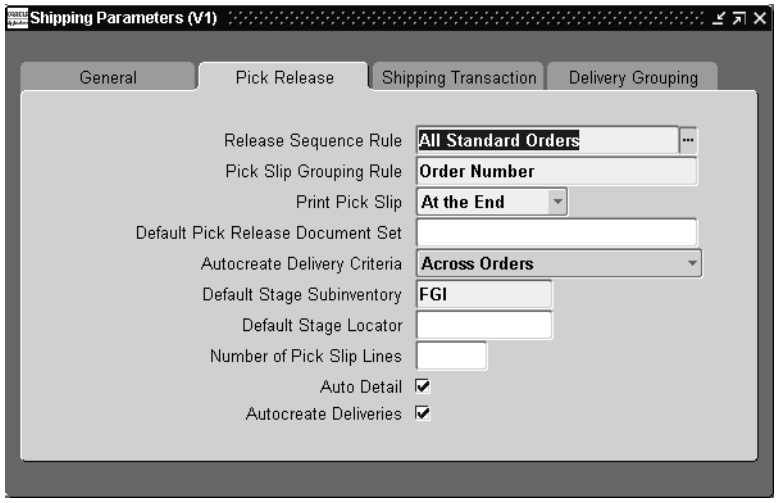
2. Click the General tab.
3. Select the Weight Unit of Measure (UOM) Class.
4. Select the Volume UOM Class.
5. Select the default unit of measure for the Percent Fill Basis of a container. You can select quantity, volume, or weight. Percent Fill Basis is used to determine if containers have met their minimum fill percentage requirements.
6. Save your work.

Defining Pick Release Parameters

You can define default picking criteria that is used at pick release. You can determine which release sequence rule and pick slip grouping rule is the default for the Release Sales Order Form.

To define pick release parameters:

1. Navigate to the Shipping Parameters window.



2. Click the Pick Release tab.
3. Select the Release Sequence Rule that you want to default into the Release Sales Order Form.
4. Select the Pick Slip Grouping Rule that you want to default into the Release Sales Order Form.
5. Select when you want the Pick Slip(s) to be printed.
   - Select At the End to print all pick slips after all pick slips are created.
   - Select Immediate to print pick slips individually as the requirements for each pick slip is filled.
6. Select the default staging location where the move order moves materials.

7. Select Auto Detail if you want the order lines detailed immediately after they are created. If you want to manually detail the order lines at a later point, do not select Auto Detail.

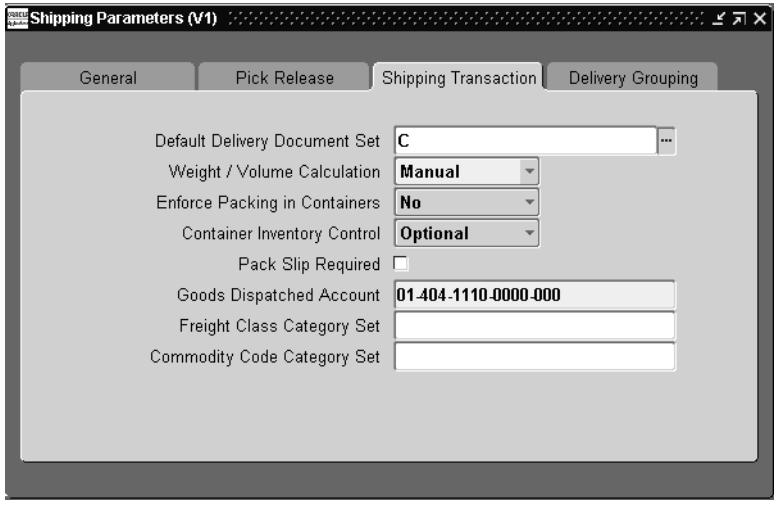
   The Auto Detail default can be overridden at each Pick Release.

Defining Shipping Transaction Parameters

You can define parameters for your shipping transactions such as automatic or manual weight and volume calculations, container volume calculations, and goods dispatched account.

To define shipping transaction parameters:

1. Navigate to the Shipping Parameters window.



2. Click the Shipping Transaction tab.
3. Select the name of the default delivery document set.
4. Select the Weight / Volume Calculation:
   - If you select Automatic, the weight and volume is calculated automatically when the status of the trip or delivery is changed to planned and the trip or delivery is packed or ship confirmed. The automatic calculation of weight and volume includes the fill percentage and an estimate of the containers and their quantities based on the delivery line master / detail container items and the Item Relationships.
   - If you select Manual, you must manually calculate the weight and volume by selecting the Calculate Weight / Volume from the Action button.
5. Select if you want to enforce packing in containers:

- If you select Yes, a warning is displayed during Ship Confirm when a delivery or trip is shipped containing unpacked delivery line items.
- If you select No, a warning is not displayed during Ship Confirm if you ship a delivery or trip containing unpacked delivery line items.

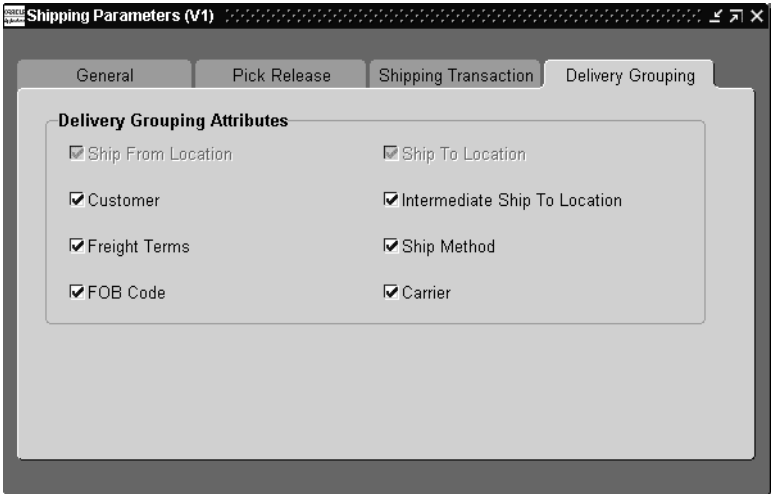
6. Optionally, enable Pack Slip Required if you want a Packing Slip printed for each shipment.
7. Select the Goods Dispatched Account.
8. Save your work.

Defining Delivery Grouping Parameters

You can define how to group delivery lines for a delivery. The default attributes are Ship From Location and Ship To Location; however, you can select additional attributes such as Customer, Freight Terms, and FOB Code. If the delivery lines have the same criteria, they are matched up during autocreate delivery. For example, if you have selected Customer as one of the Delivery Grouping attributes, the delivery lines are grouped with others for the same customer. To select an attribute, click the box next to the attribute name.

◗ To define delivery grouping parameters:

1. Navigate to the Shipping Parameters window.



2. Click the Delivery Grouping tab.
3. Choose the attribute(s) for grouping the delivery lines.
4. Save your work.

Defining Shipping Exceptions

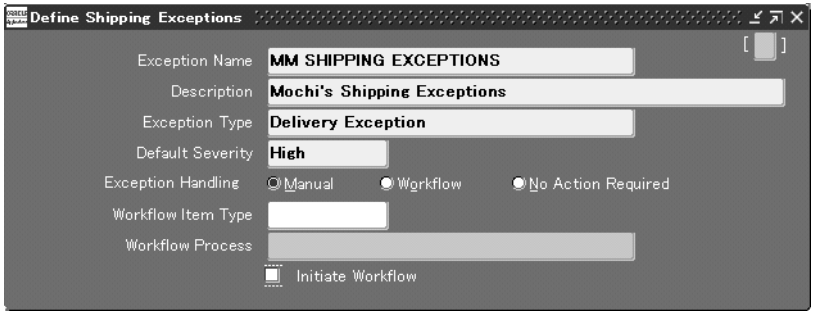
During the shipping and transportation of goods, unforeseen shipping exceptions can occur that conflict with the actual requirements of the shipper, transportation carrier, or customer, for example, if the wrong goods are sent to the customer.

If these exceptions are not handled promptly or properly, it could result in reduced customer satisfaction and loss of business and revenue for a company. Tracking exceptions can also be helpful to identify and correct defects in the business process.

You can define exceptions and processes for exception handling, log exceptions, associate status to exceptions at various stages in the logging and handling process, start exception handling, and view and track exceptions.

To define shipping exceptions:

1. Navigate to the Define Shipping Exceptions window.



2. Enter a unique exception name to identify the exception.
3. Enter a description of the exception.
4. Select the type of exception that you want to create, for example, a delivery exception.
5. Select one of the following default severity settings:

   High: The exception must be handled before the task can be completed.

   Medium: The exception must be handled before the task can be completed. However, the manager can override it so that the task can be completed.

   Low: A warning is given but the task can be completed.
6. Choose one of the following exception handling methods:

Manual: The exception must be manually corrected and the exception status must be closed.

Workflow: A workflow is used for exception notification and exception handling.

No Action Required: No exception handling method is required.

7. If you select workflow as the exception handling method, enter the workflow item type and enable the Initiate Workflow box.
8. Save your work.

Defining Transportation Calendars

You can assign a transportation calendar to define valid shipping days and hours to for a shipper, receiver, and carrier. You can define both shipping and receiving calendars to designate when your customers, customer sites, suppliers, supplier's sites, and internal organizations can ship and / or receive.

For example, if you want to ship a delivery on Tuesday to arrive at your customer's site on Wednesday, the system checks the calendar(s) to confirm that:

- your warehouse can ship for that day and time.
- your customer can receive goods on Wednesday.
- your carrier is able to pick up and drop off the deliveries on those days.

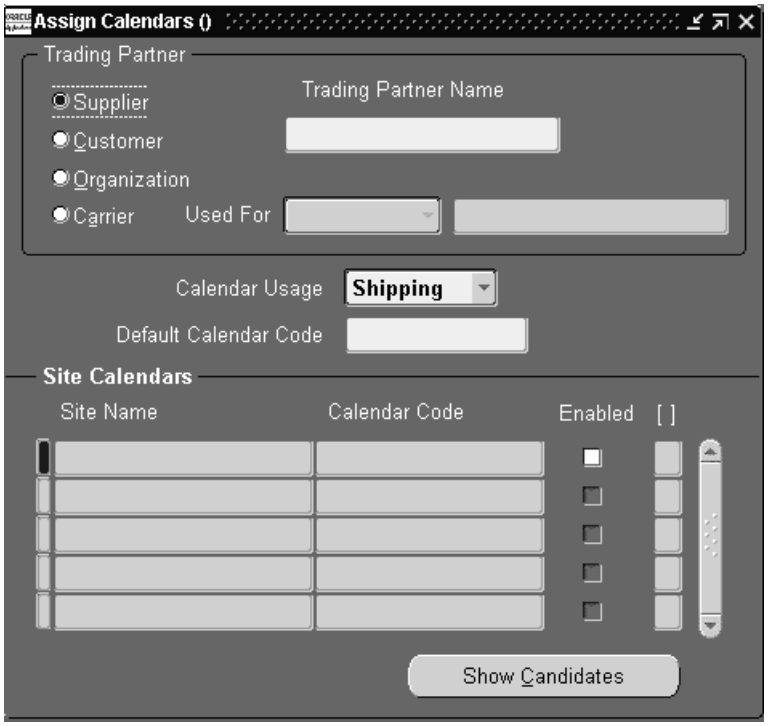
> **Note:** When no delivery calendar is available for a carrier, every day is assumed to be a valid shipping and receiving day.

Prerequisites

- ❑ The Workday calendar to be assigned to a shipper, receiver, or carrier must be created and defined in the Oracle Bills of Material (BOM) application
- ❑ The start and end dates for the calendar must be defined.
- ❑ The location's shipping and non-shipping patterns must be defined.

To define a transportation calendar:

1. Navigate to the Assign Calendars window.



2. In the Trading Partner region, choose the trading partner to which you want to assign the calendar.
3. Select the trading partner name.
4. Select the calendar usage.

   The calendar usage depends on the trading partner you selected. For example, if the trading partner is receiving your goods, create a Receiving Calendar.
5. Select the default calendar code.

   Every site for the selected trading partner is also assigned the default calendar. To override the default calendar, you can manually select a different calendar for a particular site. Complete the following steps to override the default calendar for a specific site:

6. Choose the Show Candidates button.

   The sites, if any, are displayed in the Site Calendars region.

7. Select the calendar code that you want, and enable the Enabled box.

   The calendar you selected is used as the calendar for that site.

8. Save your work.

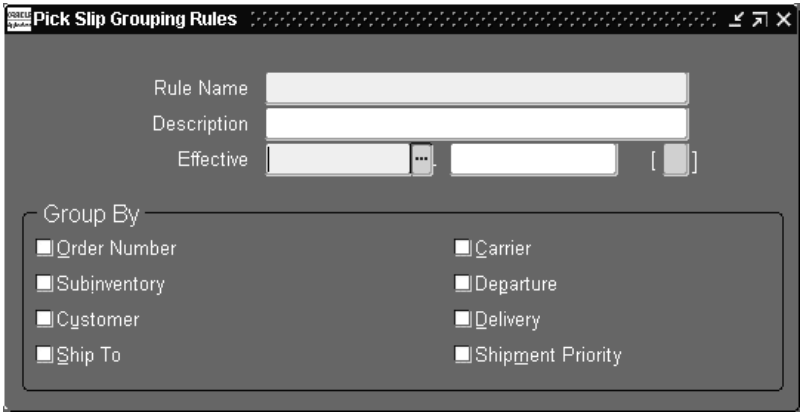
Defining Pick Slip Grouping Rules

You can create grouping rules to organize how picking lines for released sales orders are grouped on to pick slips. For example, if you wanted to group all the pick slips by delivery, you can create a rule that groups pick slips by delivery.

You can also group pick slips using more than one criteria; for example, if you selected Subinventory and Delivery as your grouping criteria, the pick slips would be grouped according to picking lines that had the same subinventory and delivery information.

◗ To define pick slip grouping rules:

1. Navigate to the Pick Slip Grouping Rules window.



2. Enter a unique name to identify the grouping rule.
3. Enter a description of the rule.
4. Enter the effective start and end dates for the rule.
5. In the Group By region, select the grouping criteria for the pick slips.
6. Save your work.

Defining Release Sequence Rules

You can define release sequence rules to specify the order in which eligible picking lines are allocated to Inventory during pick release. The order picking lines are released is based on the following attributes:

- Order number
- Outstanding Invoice Value
- Schedule Date
- Departure Date
- Shipment Priority

You can assign a priority level to one attribute or all of the attributes for the release sequence rule, with 1 being the highest priority and 5 being the lowest.

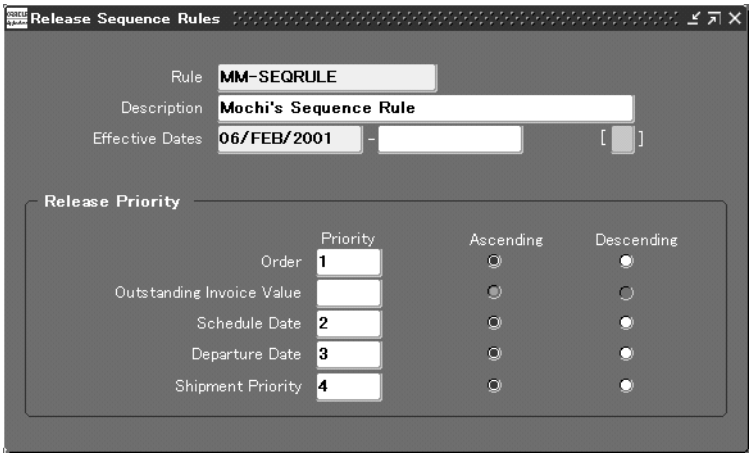
You can also define whether you want the picking lines released based on the attribute in an ascending order or a descending order. For example, if you define order number as your number 1 priority and select the associated Ascending toggle, the eligible picking line with the lowest order number is released first followed by the picking line with the next lowest order number.

You can define either the Outstanding Invoice Value attribute or the Order attribute for the Release Sequence Rule, but you cannot select both for the same rule. No two attributes can be given the same priority.

You can edit existing release sequence rules, but you cannot change the name of an existing release sequence rule.

To define release sequence rules:

1. Navigate to the Release Sequence Rules window.



2. Enter a name for the rule you want to create.
3. Enter the effective dates for the rule.
4. Specify a Priority (1, 2, 3, 4, or 5 where 1 is the highest priority and 5 is the lowest) for one or all of the following attributes:

   Order Number: Releases picking lines based on order number. If you define a priority for the Order Number attribute, you cannot define a priority for the Outstanding Invoice Value attribute.

   Outstanding Invoice Value: Releases picking lines based on the outstanding invoice value. If you define a priority for the Outstanding Invoice Value attribute, you cannot define a priority for the Order Number attribute.

   Schedule Date: Releases picking lines based on schedule date.

   Departure Date: Releases picking lines based on departure date.

   Shipment Priority: Releases picking lines based on shipment priority.
5. Select the Ascending or Descending toggle next to each attribute.
6. If you select the Ascending toggle next to the Schedule Date attribute, for example, the picking lines with the earliest Schedule Date are released first. If

you select the Descending toggle, the picking lines with the most recent Schedule Date are released first.

7. Save your work.

Defining Container-Item Relationships

You can define the relationship between container items and load items to specify which and how many items can be contained within other items. Container items are items that can contain other items. Load items are items that can be loaded into a container.

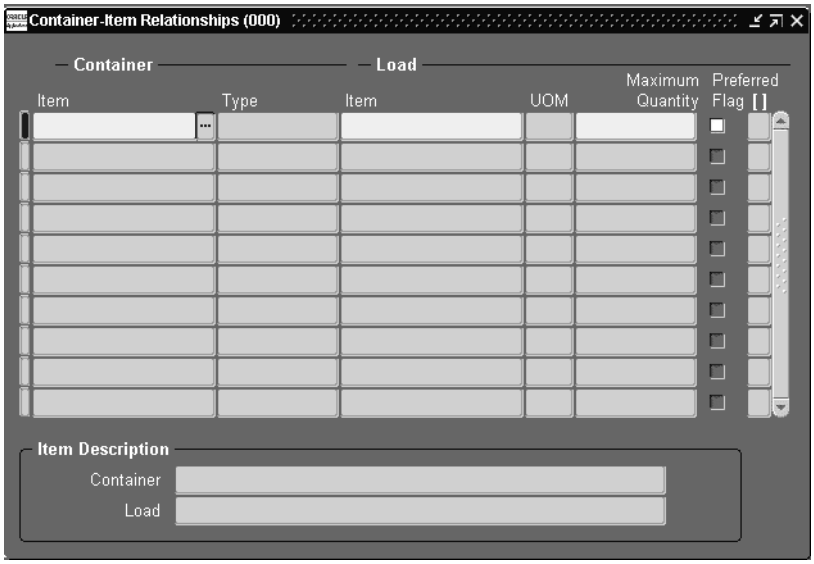
Since a container item can be loaded into another container, a container item can also be a load item. For example, axles can be packed into a box and the box can be loaded onto a vehicle. The box serves as both a container item for the axles and an item for the vehicle.

When you define the relationship between items, you specify the maximum number of items that can be contained within a container item. This maximum quantity is used to:

- Calculate the fill percentage for containers when the Fill Percentage Shipping parameter is set to Quantity. See: Defining Shipping Parameters.
- Calculate / estimate the number of containers required for delivery lines in a departure or delivery.

To define container-item relationships:

1. Navigate to the Container-Item Relationships window.



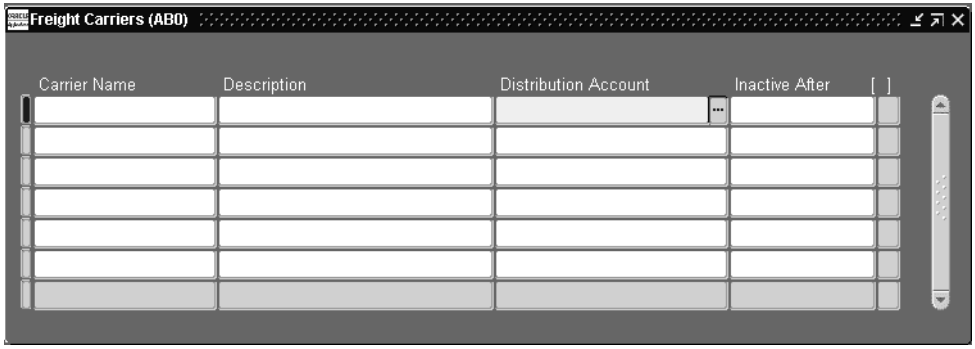
2. Select the Container Item from the List of Values.
3. The Container Item and Container Type display in the window.
4. Select the Item from the List of Values that you want to place in the Container Item.
5. Define the Maximum Quantity of Items you can place in the Container Item.
6. Continue defining all your Container-Item relationships until finished.
7. Save your work.

Defining Freight Carriers

A freight carrier is a commercial company that provides internal shipments between organizations and shipments to and from customers and suppliers. You need to add information about a freight carrier (supplier) before you can tender a load or create a delivery for that carrier. You must associate a general ledger account with each carrier to collect associated costs. You can assign a carrier to each inter-organization transaction.

◗ To define a freight carrier:

1. Navigate to the Freight Carriers window.



2. Enter a name for the Freight Carrier. The carrier must be assigned to each warehouse.
3. Enter a description of the carrier.
4. In the Distribution Account field, select the general ledger distribution account associated with using this carrier.

   This account can be used when you perform an inter-organization transfer and specify freight charges.
5. Optionally, you can select an Inactive Date. When the Inactive Date starts, the carrier cannot be assigned to any functions until it is reactivated.
6. Save your work.

Defining Freight Costs

You can define allowable freight costs and suggested amounts for shipments at shipping confirmation. You can add multiple freight costs to a shipment from the list of allowable freight cost types and override the suggested freight amounts when you confirm shipments. Defining freight costs gives you greater flexibility in tracking costs for a Freight Cost Type. For example, if one of your freight cost types is insurance, you can add freight cost names to track different insurance costs.

When you add freight costs at ship confirmation for a foreign currency order, you can use either your functional currency or the order's foreign currency. If you use your functional currency, the freight charges are converted to the order currency through Oracle Receivables.

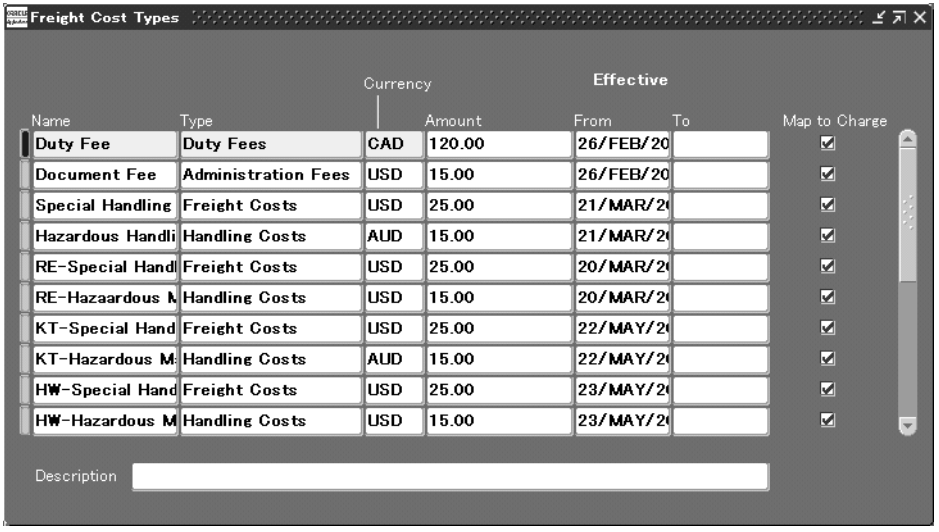
Note: You should define all your freight costs in your functional currency for uniformity. You can then modify the currency to match the order, and modify the amount on the Confirm Shipments window, as necessary.

Prerequisites

❑ Define your Freight Cost Type Lookups. See: *Defining Order Management Lookups*.

To define freight costs:

1. Navigate to the Freight Cost Types window.



2. Enter a name for the freight cost.
3. Select a Freight Cost Type.
4. Select a currency for the freight charge.
5. Enter the amount for the freight charge.

   You can change this amount during ship confirmation. Optionally, enter effective dates for the freight charge.
6. If you want choose Map to Charge.
7. Save your work.

Profile Options

During implementation, you set a value for each user profile option to specify how Shipping Execution controls access to and processes data.

Generally, the system administrator sets and updates profile values. See: Setting User Profile Options, *Oracle Applications System Administrator's Guide.*

Implementing Profile Options Summary

The table below indicates whether you can view or update the profile option and at which System Administrator levels the profile options can be updated: User, Responsibility, Application, or Site levels.

A Required profile option requires you to provide a value. An Optional profile option already provides a default value, so you only need to change it if you do not want to accept the default.

Note: If you are using a multi-organization structure, your system administrator must change the *OM Item Validation Organization* profile option to be visible and updatable at the responsibility level. This change allows Shipping Execution to default tax code and revenue account information correctly. See: Setting Up, *Multiple Organizations in Oracle Applications.*

Profile Option	User	System Administrator				Requirements	
	User	User	Resp	App	Site	Required	Default Value
WSH: Allow Future Initial Ship From Date	0	X	X	X	X	Optional	No is the default
WSH: Debug	X	X	X	X	X	Optional	No is the default
WSH: Enforce Freight Carrier at Ship Confirm	0	X	X	X	X	Optional	No
WSH: Invoice Numbering Method	0	-	-	-	-	Required	Automatic
Key	**X**	You can update the profile option.					
	-	You can view the profile option value but you cannot change it.					
	0	You cannot view or change the profile option value.					

WSH: Allow Future Departure Date

Specifies if you can do advance ship confirm for pick release.

- *Yes:* Allows future-dated departure dates for ship confirm. (Default value)
- *No:* Does not allow future-dated departure dates for ship confirm. (Default value).

WSH: Debug

Provides additional messages or debug information to user if system error occurs. Debug information can be logged in a log file for reference or printed.

- *Yes:* Provides additional debug information to the user. (Default value)
- *No:* Does not provide additional debug information to the user.

WSH: Enforce Freight Carrier at Ship Confirm

Ensures that the freight value carrier is assigned and enforces selection of same carrier at ship confirm.

- *Yes:* Enables validation of freight carrier at ship confirm. (Default value)
- *No:* Does not enforce validation of freight carrier at ship confirm.

WSH: Invoice Numbering Method

Determines how the invoice number is created in Oracle Receivables.

- *Delivery Name:* Delivery name is used as the invoice number.
- *Automatic:* Auto-invoice automatically creates the invoice number. (Default value).

2

Shipping

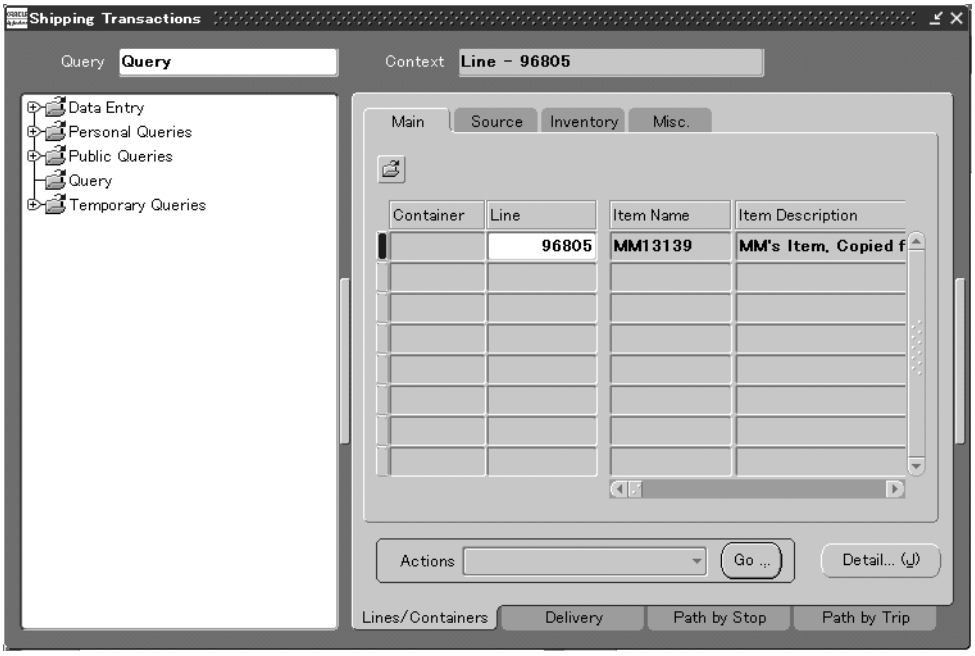
Overview of Shipping

You can manage shipping information such as trips, stops, delivery legs, deliveries, and delivery lines in the centralized workbench called the Shipping Transaction window. In addition, you can complete the following shipping tasks:

- Create trips and assign delivery lines to the trip, create a delivery and assign delivery lines to the delivery, and find delivery lines and group the lines into trips and deliveries. You can schedule vehicle deliveries, assign scheduled shipment lines to a planned trip, estimate the number of containers required for shipment, sequence deliveries within a trip, and sequence vehicle load ordering for lines within a delivery.
- Release eligible delivery lines based on defined picking criteria. You can define Release Sequence Rules to control the order in which picking lines are allocated to inventory. You can also define Pick Slip Grouping Rules to define how picking lines are grouped onto pick slips.
- Define shipped quantities and inventory control information for delivery lines, assign freight charges, and define whether released picking line items are shipped or backordered by process order API. You can ship confirm or backorder a delivery. You can also assign unplanned delivery lines to trips and deliveries during ship confirm.

Shipping Transactions window

The Shipping Transaction window provides a centralized workbench that consolidates three major shipping functions: planning, pick releasing, and ship confirming. It allows you to plan and organize trips, stops, delivery legs, deliveries, and delivery lines.



The window consists of a Query Manager and a Data Manager:

Query Manager: Allows you to perform customized searches called queries to find information about shipping entities such as trips, stops, deliveries, delivery lines, and containers. You can use existing queries, save new ones, and share queries with other authorized users.

Data Manager: Allows you to manage information about various shipping entities.

In the Shipping Transaction window, you can do the following:

- plan trips, stops, deliveries, and delivery lines / containers
- confirm a shipment or delivery

- track single-leg shipments
- track shipping containers
- handle over and under shipments
- initiate Intrastat (European) transactions
- pick release trip, stop, delivery, and delivery lines
- run reports

3

Searching with Query Manager

Query Manager

In Query Manager, you can define and save queries to search for and manage the following shipping entities:

- Trips
- Stops
- Deliveries
- Containers
- Delivery Lines

You can create customized queries (searches) by entering your search parameters and saving them as a Personal or Public Query. Once a query is saved, it can be re-used for future searches. For example, if you create a query named Find Container to find certain containers, then you can use the Find Container query for future searches rather than re-enter the search parameters for each search.

Queries that are marked as Public Queries can be shared with others in your organization. This is useful, for example, if you want to centrally manage the queries and share them among authorized users.

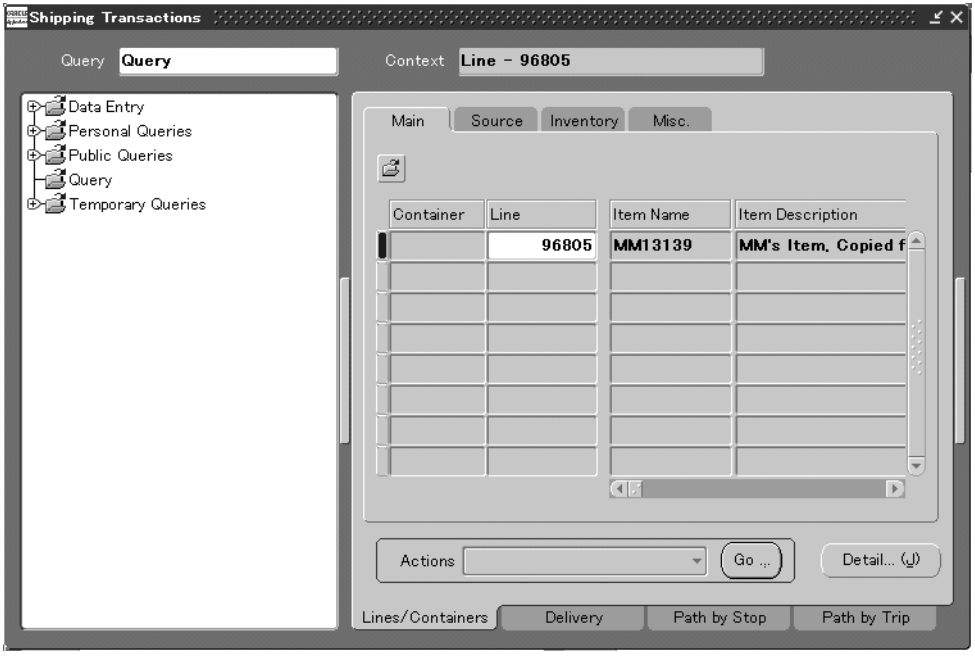
In Query Manager, you can create the following types of queries:

Personal Query	For queries that you want to save for your personal use.
Public Query	For queries that you want to save and share with other authorized users.
Temporary Query	For infrequently used queries such as those you use for one session only.

Note: If you want to save a query for future searches you must save it as a Personal or Public Query. Otherwise the query is saved only temporarily for the session. You can use a temporary query to search for all shipping entities.

To open an existing query:

1. Navigate to the Shipping Transactions window.



2. Select the existing query from either the Personal Queries, Public Queries, or Temporary Queries folder.

   The query results are displayed in the Shipping Transactions window.

Saving a Query

If you frequently query the same item, it is easier to save your queries rather than re-enter the search parameters each time you repeat the search. For example, if you create a query named Find Container to find certain containers, you can use the Find Container query every time you need to do the same search.

◗To save a query:

1. Navigate to the Query Manager window.
2. In the Saved Query region, enter a name and description for the query.
3. Optionally, for a Public query, enable the Share box.
4. In the Search For region, choose the entity that you want to query such as Trips or Stops.
5. Complete your search criteria in the Main and Additional tabs.
6. Choose the Save button.

   A checkmark displays in the Shared Query box to indicate that the query is saved. Saved queries are displayed in the left pane of the Shipping Transactions window.
7. Choose the Find button to continue your search.

Finding Trips

You can find an existing trip using the Query Manager.

Prerequisites

- ❑ A trip must be created when querying a trip.

◗ To find a trip:

1. Navigate to the Query Manager window.

2. In the Search For region, choose Trips.

   In the Trips tab, define the criteria for your query.
3. Select the trip name(s) that you want to query.
4. Select the trip status.
5. Select if the trip is planned or unplanned.

6. Select the ship method.

   In the Vehicles region, enter vehicle information for the trip you want to query.

7. Select the organization of the vehicle for the trip.
8. Select the prefix number.
9. Select the vehicle numbers.
10. Choose the Find button.

    The search results are displayed in the Shipping Transactions window.

Finding Stops

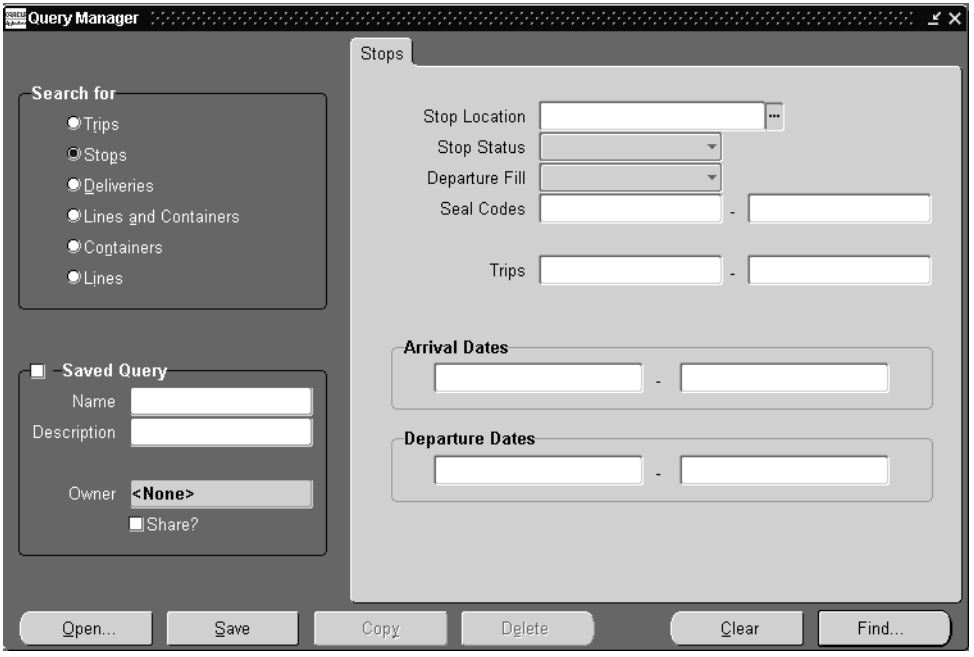
You can find an existing stop using the Query Manager.

Prerequisites

❑ A stop must be created when querying a stop.

◗ To find a stop:

1. Navigate to the Query Manager window.



2. In the Search For region, choose Stops.

   In the Stops tab, define the criteria for your query.

3. Select the Stop Location for your query.
4. Select the stop status.
5. Select the departure fill.
6. Select the seal codes, if applicable.

7. Select the trip range for the stop.
8. Enter the range for the Arrival and Departure Dates for the stop.
9. Choose the Find button.

   The search results are displayed in the Shipping Transactions window.

Finding Deliveries

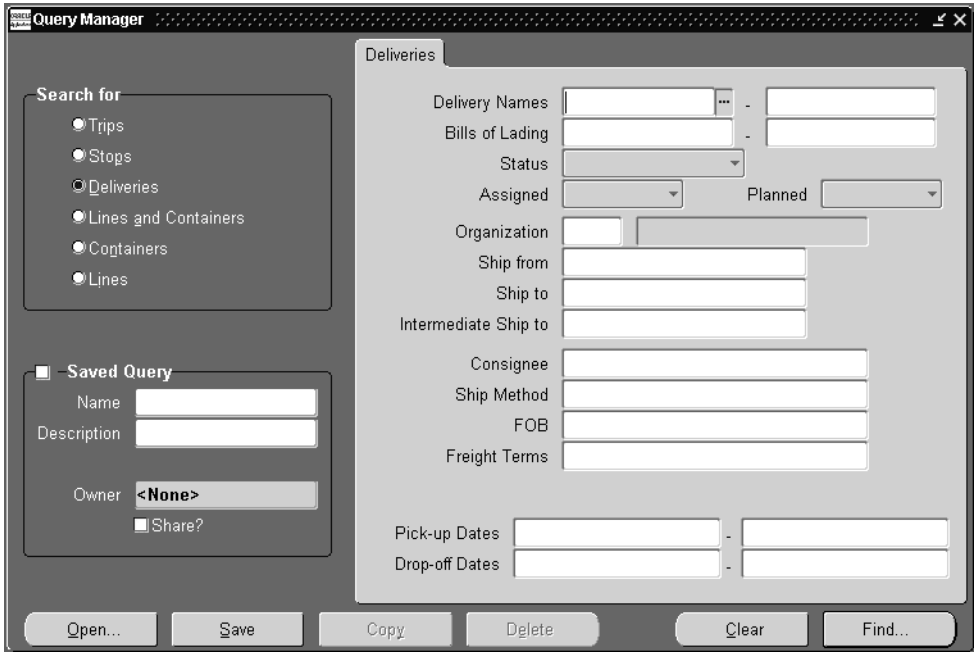
You can find an existing delivery using the Query Manager.

Prerequisites

- ❑ A delivery must be created when querying a delivery.

◗ To find a delivery:

1. Navigate to the Query Manager window.



2. In the Search For region, choose Deliveries.

   In the Deliveries tab, define the criteria for your query.
3. Select the delivery name.
4. Select the bill of lading.
5. Select the status of the delivery.

6. Select whether you want to query assigned, unassigned, planned or unplanned deliveries.
7. Select the organization for the delivery.
8. Select the Ship From, Ship To, and Intermediate Ship To criteria.
9. Select the consignee, if any, for your delivery.
10. Enter the ship method.
11. Enter the FOB.
12. Enter the freight terms.
13. Select the load tender status of the delivery.
14. Select the range for the delivery pick-up and drop-off dates.
15. Choose the Find button.

    The search results are displayed in the Shipping Transactions window.

Finding Delivery Lines and Containers

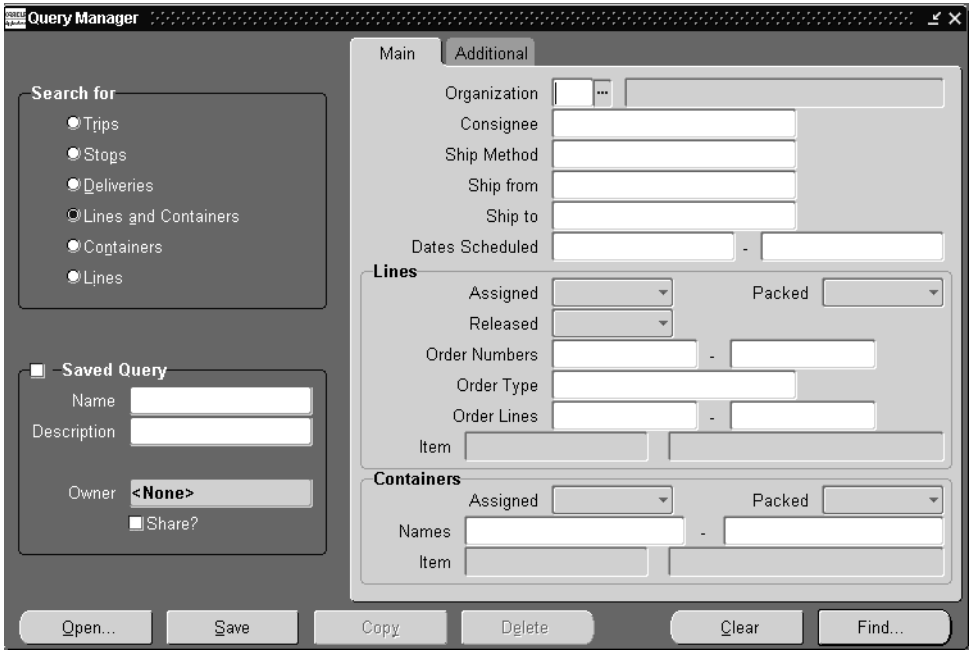
You can find delivery lines and containers by selecting the query criteria for the lines and containers you want. You can find the lines associated with a container or find containers assigned to delivery lines. You can also enter shared criteria to find delivery lines and containers assigned to a particular organization.

Prerequisites

- ❑ Lines and containers must be created when querying delivery lines and containers.

◗ To find delivery lines and containers:

1. Navigate to the Query Manager window.



2. In the Search For region, choose Lines and Containers.

   In the Main tab, define the criteria for your query.

3. Select the organization to which the lines and containers are assigned.

4. Select the consignee, if any, that is assigned to the lines and containers.
5. Select the ship method.
6. Select the Ship From and Ship To dates.
7. Select the range of scheduled delivery dates.

   In the Lines region, define the search criteria for the delivery lines:

8. In the Assigned, Packed, and Released fields, select Yes or No to define the status of the containers you want to find.

   For example, if you select Yes for each field, the search is restricted to containers that are Assigned, Packed, and Released.

9. Select the range of order numbers.
10. Select the order type.
11. Enter the range for the order lines.

    In the Containers region, define the search criteria for the containers:

12. In the Assigned and Packed fields, select Yes or No to define the status of the containers you want to find.

    For example, if you select Yes for each field, the search is restricted to containers that are Assigned and Packed.

13. Select the container names that you want to query.
14. When you have completed your entries, click the Additional tab.

In the Additional tab, you can add additional criteria for your query.

15. When you have completed your entries, choose the Find button.

    The search results are displayed in the Shipping Transactions window.

Finding Containers

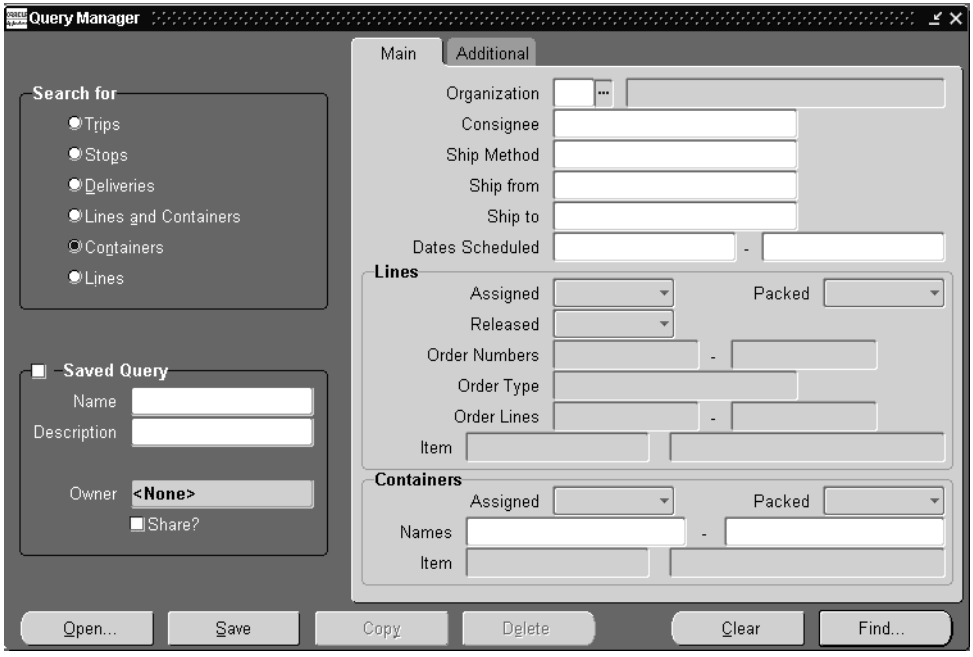
You can find existing containers using the Query Manager.

Prerequisites

- ❑ A container must be created when querying a container.

◗ To find containers:

1. Navigate to the Query Manager window.



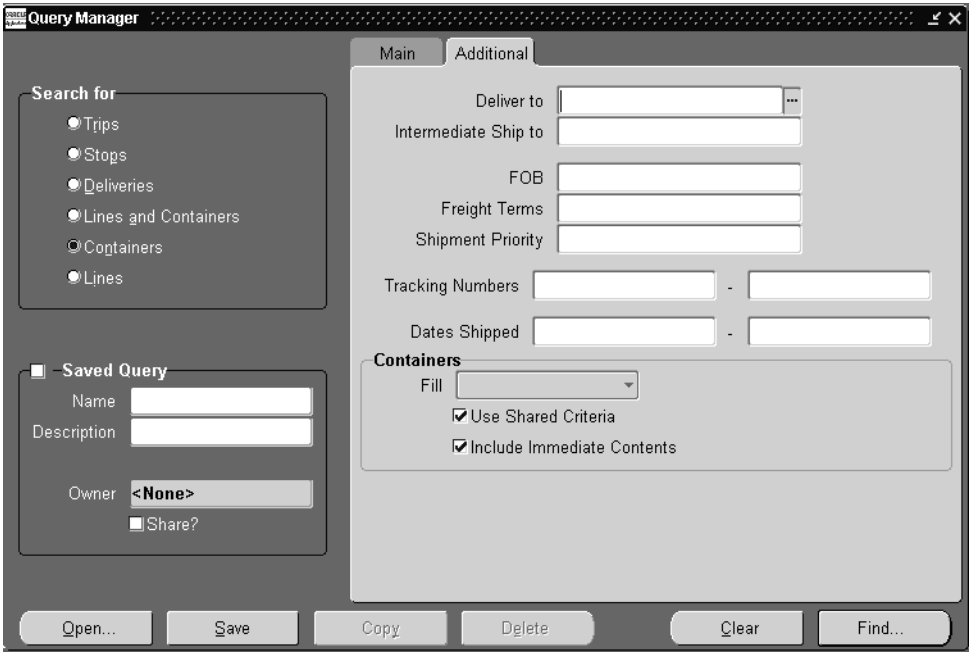
2. In the Search For region, choose Containers.

   In the Main tab, define the criteria for your query.
3. Select the organization to which the containers are assigned.
4. Select the consignee, if any, that is assigned to the containers.
5. Select the ship method.

6. Select Ship From and Ship To dates.
7. Select the range of scheduled delivery dates.

   In the Containers region, define the criteria for your query.
8. In the Assigned and Packed fields, select Yes or No to define the status of the container(s) you want to find.

   For example, if you select Yes for each field, the search is restricted to containers that are Assigned and Packed.
9. Select the range of container names you want to search for.
10. When you have completed your entries, click the Additional tab.



   In the Additional tab, you can add additional criteria for your query.
11. When you have completed your entries, choose the Find button.

    The search results are displayed in the Shipping Transactions window.

Finding Delivery Lines

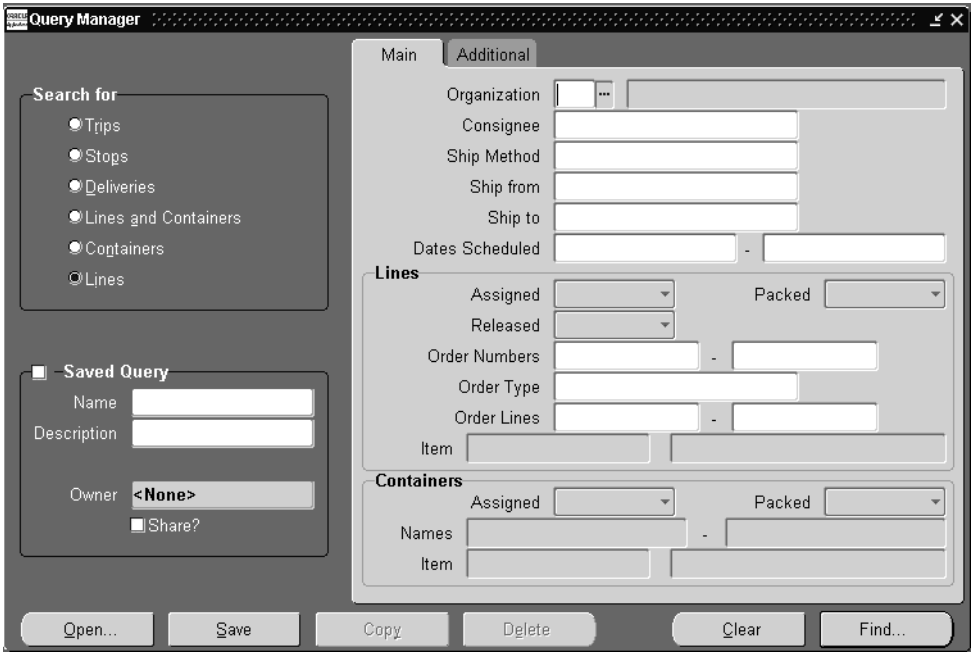
You can find existing delivery lines by using the Query Manager.

Prerequisites

- ❑ A delivery line must be created (for example, an order containing lines must be booked).

◗ To find delivery lines

1. Navigate to the Query Manager window.

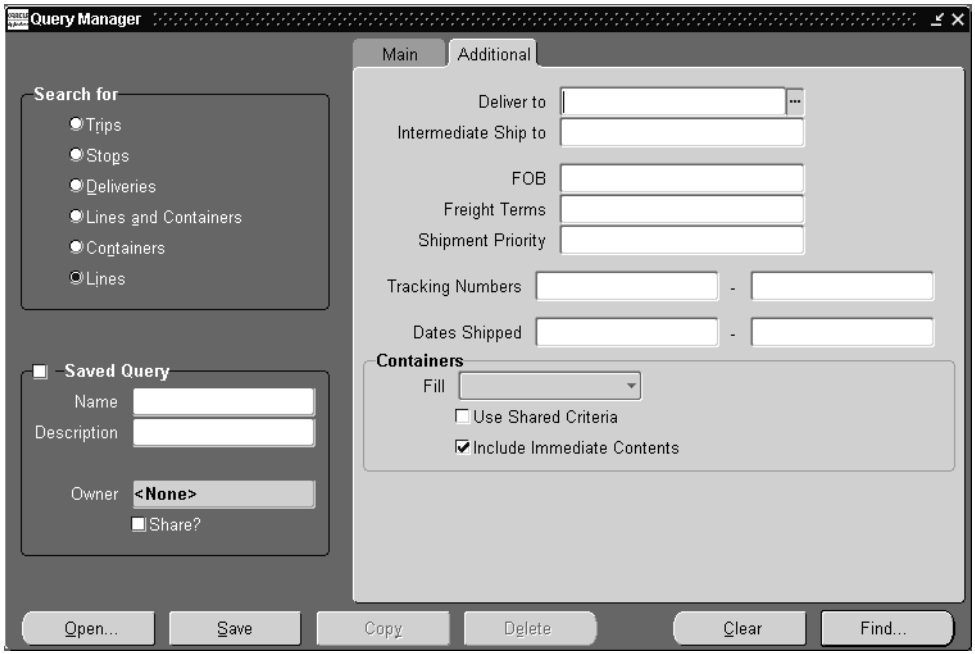


2. In the Search For region, choose Lines.

   In the Main tab, define the criteria for your query.

3. Select the organization to which the delivery lines are assigned.
4. Select the consignee, if any, that is assigned to the delivery lines.

5. Select the ship method.
6. Select Ship From and Ship To dates.
7. Select the range of scheduled delivery dates.
8. In the Assigned, Packed, and Released fields, select Yes or No to define the status of the delivery lines you want to find.
9. Enter the range for the order numbers.
10. Select the order type.
11. Select the range of order lines.
12. When you have completed your entries, click the Additional tab.



In the Additional tab, you can add additional criteria for your query.

13. When you have completed your entries, choose the Find button.

    The search results are displayed in the Shipping Transactions window.

4

Trip Planning

Overview of Trips

A trip consists of delivery lines (order line details) that are scheduled to be shipped in a specific vehicle on a specific date by a specific carrier departing from a particular location. The delivery lines within the trip can be assigned to multiple deliveries, allowing you to ship items to different customers or different ship-to locations. A trip must consist of at least two stops, for example, a stop to pick up goods and another stop to drop off goods.

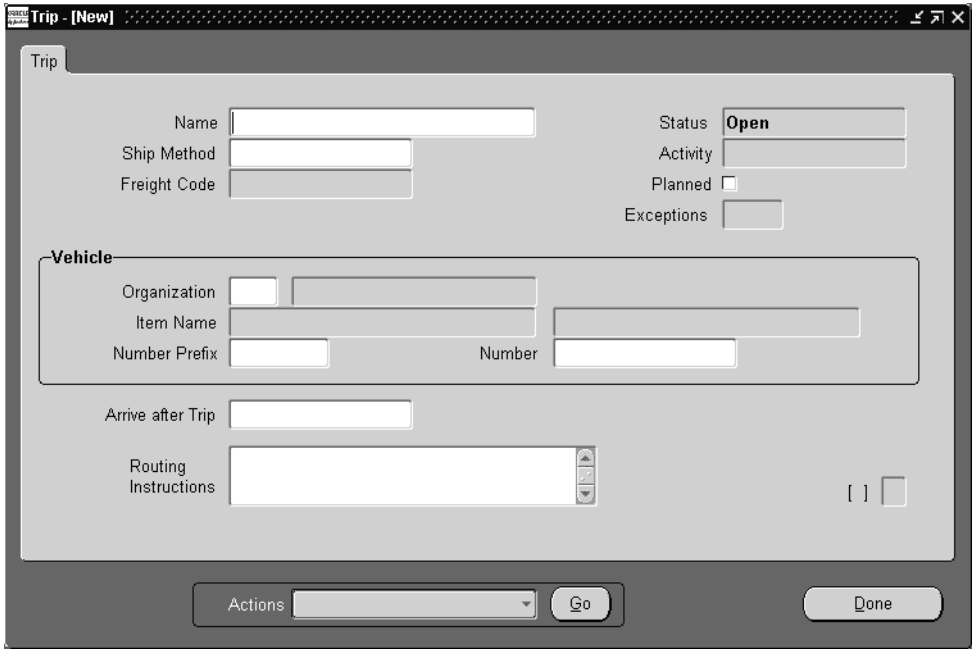
Creating a Trip

There are different options available when creating a trip. You can create a trip to which you can later assign delivery lines or find the delivery lines and create a trip. You can choose to either manually or automatically create a trip:

- *Manually creating a trip*: When you manually create a trip, you can manually assign stops, deliveries, and delivery lines to that trip.
- *Autocreating a trip for a delivery:* You can find the delivery you want to ship, and autocreate the deliveries, trip, stops, and delivery legs.
- *Autocreating a trip for containers and lines:* You can find the lines and containers you want to ship and autocreate a trip.

◗ To manually create a trip:

1. Navigate to the Trip window.



2. Enter a name for the trip.

   If you do not define a name, Shipping Execution will automatically create a name for the trip when you save it.

Note: Your system administrator can specify the naming convention used for creating trip names. For example, you could sequentially name trips with the *Trp_* prefix so that your trips are named as Trp_1, Trp_2, etc.

If the trip is in *Planned* status, you cannot make any changes unless you first unplan the trip.

3. Select the Ship Method.

   For example, if you wanted to ship it overnight, select the corresponding ship method.

4. Select the trip that you want your new trip to arrive after.

   You can define the order in which trips arrive at their final destination. For example, if you wanted Trip A to arrive before Trip B, you would define Trip B as arriving after Trip A.

5. Enter Routing Instructions, if any.

6. In the Vehicle region, select an Organization.

   In the Vehicle Region, you can select information about the particular carrier and vehicle you want for the shipment.

7. Select the Item Name (vehicle name).

8. Select the Number Prefix and Number.

   When you have completed your entries, you can choose to plan the trip now or later. However, once the trip is in planned status, you cannot change the trip name or details without first unplanning the trip.

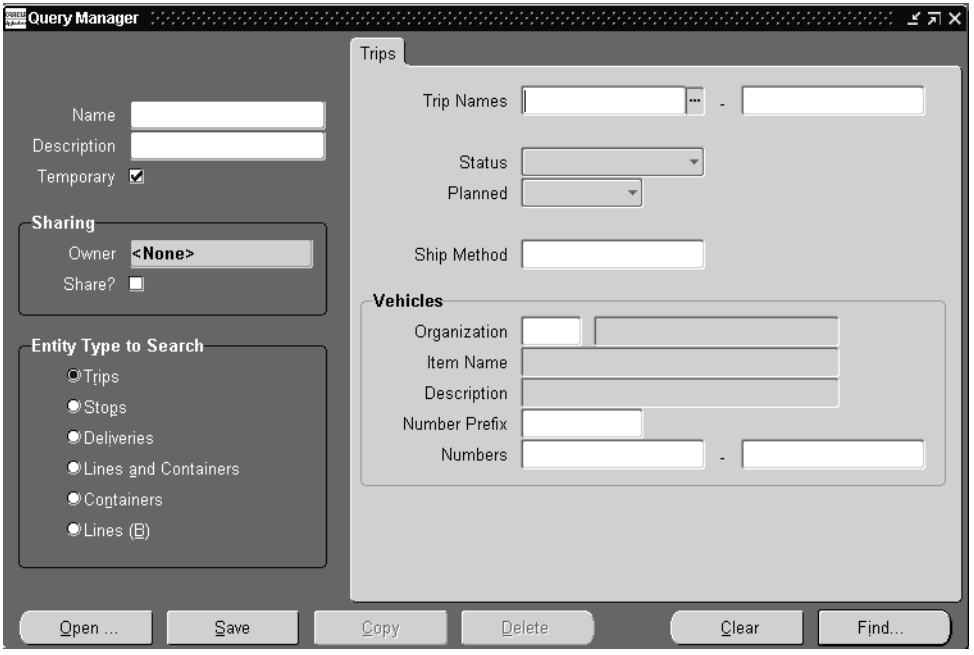
9. To plan the trip, enable the Planned box.

10. Click Done.

11. Save your work.

To autocreate a trip for a delivery:

1. Navigate to the Query Manager window, and do a search for the delivery. See: Finding Deliveries on page 3-8.



   The delivery displays in the Shipping Transactions window.

2. From the Actions menu, select Auto-create Trip.
3. Choose the Go button or press Return.
4. A trip and its related stop are created based on the Shipped From and Shipped To criteria for this delivery.

   To view information about the trip, choose the Detail tab, Path by Stop tab, or the Path by Trip tab.

5. Save your work.

To autocreate a trip for containers and delivery lines:

1. Navigate to the Query Manager window, and do a search for delivery lines and containers.

   The delivery lines and containers display in the Shipping Transactions window.

2. Select the delivery lines.
3. From the Actions menu, select Auto-create Trip.
4. Choose the Go button or press Return.
5. A trip, stop, and delivery are created for the lines and containers.

   You can choose the Delivery tab, Path by Stop tab, or the Path by Trip tab to view additional information about the trip.

6. Save your work.

Planning a Trip

You can plan a trip once deliveries and delivery lines have been assigned to a trip. After you set the status of the trip to planned, you cannot make changes such as adding or removing delivery lines unless you first unplan the trip. When you plan a trip, Shipping Execution:

- Validates that the sequence numbers between the deliveries of the trip are unique for containers within the deliveries.
- Validates that the weight, volume, and fill percentage do not exceed their maximums of containers in the delivery.
- Validates that the minimum fill percentage is met.
- Validates the planned trip date is not in the past.

Note: When you plan a trip, all deliveries assigned to the trip are also planned.

Prerequisites

- ❑ At least one delivery must be assigned to the trip.
- ❑ At least one delivery line must be assigned to each delivery in the trip.
- ❑ All delivery lines for the trip must be assigned to a delivery.

◗ To plan a trip:

1. Navigate to the Query Manager window, and do a search to find the trip.

   The trip displays in the Shipping Transactions window.
2. From the Actions menu, select Plan.
3. Choose the Go button or press Return to change the status of the trip to Planned.
4. Save your work.

Unplanning a Trip

You can unplan a trip to make changes to a planned trip: for example, if you want to add additional delivery lines or unassign delivery lines from a delivery within a trip.

When you unplan a trip, Shipping Execution:

- Sets the status of all deliveries in the trip to Open.
- Sets the status of the trip to Open.

> **Note:** All delivery lines remain assigned to their respective deliveries when you reopen a trip.

Prerequisites

- ❑ Trip status must be set to Planned.
- ❑ Trip status for all deliveries must be set to Planned.

◗ To unplan a trip

1. Navigate to the Query Manager window, and do a search to find the trip.

   The trip displays in the Shipping Transactions window. If more than one trip is displayed, select the trip you want to unplan.
2. From the Actions menu, select Unplan.
3. Choose the Go button to change the status of the trip.
4. Save your work.

Assigning Freight Costs to a Trip

You can assign new freight costs to a specific trip, override the suggested freight costs, or update existing freight costs. For example, you may need to add additional costs for a particular vehicle that the trip is using to deliver goods. A freight cost can also be assigned to a delivery, a stop, a delivery leg, a delivery detail, or a container.

◗ To assign freight costs to a trip:

1. Navigate to the Query Manager window, and do a search to find the trip.

   The trip displays in the Shipping Transactions window.

2. From the Actions menu, select Freight Costs.
3. Choose the Go button.

   The Freight Costs window appears. In this window, you can enter freight costs for the trip.

4. Enter the Cost Type, Currency Code, Amount, and Conversion Type.
5. Choose OK.
6. Save your work.

Printing a Document Set for a Trip

You can print a group of shipping documents and other reports in a set. These document sets can include pick release documents, all shipping documents, and pack slip information.

◗ To print a document set for a trip:

1. Navigate to the Query Manager window, and do a search to find the trip.

   The trip displays in the Shipping Transactions window.

2. From the Actions menu, select Print Document Set.
3. Choose the Go button.

   The document set for the trip is printed.

4. Save your work.

Calculating Weight and Volume for a Trip

The weight and volume of a trip can be automatically or manually calculated depending on whether you selected Automatic or Manual in the Weight / Volume Calculation field in the Shipping Parameters window.

- If you select Automatic, the weight and volume is calculated automatically when the status of the trip is changed to packed, planned or ship confirmed. The automatic calculation of weight and volume includes the fill percentage.
- If you select Manual, you can manually calculate the weight and volume using Calculate Weight / Volume from the Actions menu.

When the weight, volume, and fill percentage for a trip is calculated, Shipping Execution:

- Calculates the weight, volume, and fill percentage of each open delivery and adds the values to the trip's current weight, volume, and fill percentage.
- Validates that the maximum load weight, the maximum internal volume, and the maximum fill percentage are not exceeded.
- Validates that minimum fill percentage requirements are attained.
- Calculates (estimates) the number of containers for each delivery line based on container / load relationships and the master / detail container specified on the delivery line.

  The Actual fill percentage can only be calculated if you have specified a vehicle for the trip.

Prerequisites

- ❑ All delivery lines must be assigned to deliveries.
- ❑ Trip and / or delivery status must be set to Open.
- ❑ The Volume and Weight Unit of Measure fields must be defined for the trip and / or delivery.

◗ To calculate weight and volume for a trip (manually):

1. Navigate to the Query Manager window, and do a search to find the trip.

   The trip displays in the Shipping Transactions window.
2. From the Actions menu, select Calculate Weight / Volume.
3. Choose the Go button.

The weight and volume is calculated and you can view the information in the Stops tab, Contents by Delivery tab, or the Contents by Line / Container.

4. Save your work.

Note: If you selected Automatic in the Weight / Volume Calculation field in the Shipping Parameters window, the calculation is done automatically and does not require you to manually calculate the values.

5

Creating Deliveries

Overview of Deliveries

A delivery consists of a set of delivery lines that are scheduled to be shipped to a customer's ship-to location on a specific date and time. You can include items from different sales orders as well as backorders in a delivery. You can group several deliveries in one trip. You can find, create, sequence, assign, modify, cancel, plan, unplan, and reopen deliveries.

When delivery lines are assigned to a delivery, they are grouped by the mandatory default criteria: Ship From Location and Ship To Location. However you can select additional grouping criteria such as:

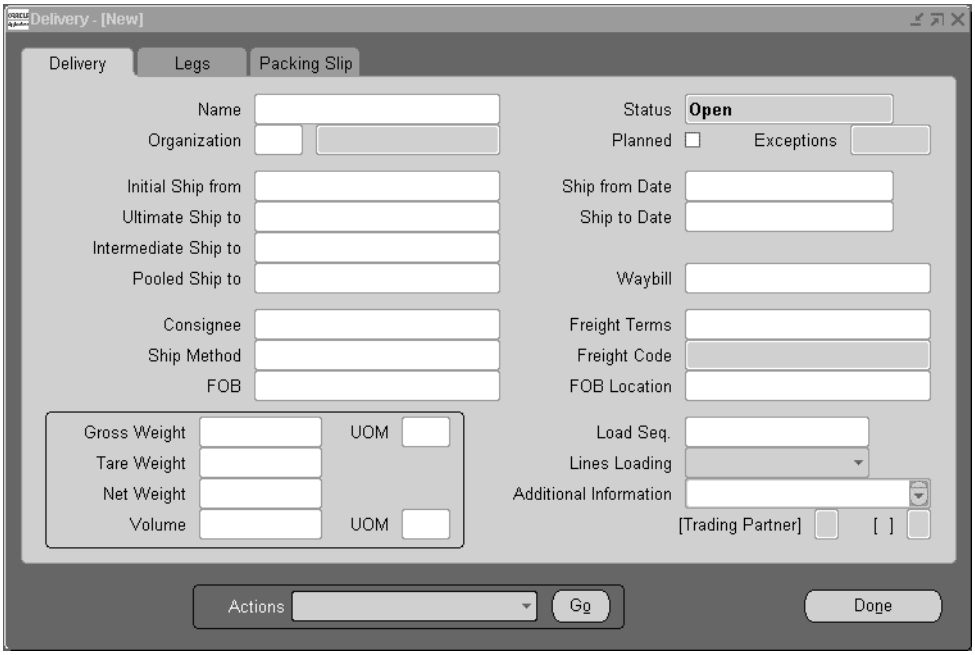
- Customer
- Freight Terms
- FOB Code
- Intermediate Ship To Location
- Ship Method
- Carrier

Creating a Delivery

You can create a delivery in the Delivery window or automatically create deliveries at Pick Release by selecting Auto-create Deliveries as the default in the Pick Release tab in the Shipping Transactions window.

◗ To create a delivery:

1. Navigate to the Delivery window.



2. Enter a name for the delivery.

   If you do not define a delivery name, Shipping Execution will automatically define a name when you create the delivery.

> **Note:** Your system administrator can specify the naming convention used for creating delivery names. For example, you could specify that all deliveries started with the *Del_* prefix so that your deliveries would be named Del_1, Del_2, etc.

3. Select the organization you are shipping to.
4. Select the initial ship from location.
5. Select the ship from date.
6. Select the ultimate ship to location.
7. Select the ship to date.
8. Select the intermediate ship to location if applicable.

   Note: You must have Oracle Release Management installed to define an Intermediate Ship-To Location.

9. Select the pooled ship to, if applicable.
10. Enter the waybill number.
11. Select the consignee.
12. Enter the freight terms.
13. Select the ship method.
14. Enter the freight on board (FOB), enter the FOB location, enter the gross weight, enter the unit of measure (UOM) for the gross weight, enter the tare weight, enter the net weight, and enter the volume.
15. Enter the unit of measure (UOM) for the volume.
16. Enter the volume.
17. Enter the sequence number to determine the order in which the delivery will be placed in the trip.
18. Select the lines loading order in which the delivery lines are placed in the delivery.

    You can select from Forward, Reverse, Forward-Inverted, or Reverse-Inverted. See: Generating a Loading Sequence on page 5-10.

    Enter any additional information that may be required.
19. Save your work.

Auto-creating Deliveries

You can automatically create deliveries for delivery lines that have not been assigned to a delivery.

Prerequisites

- ❑ Delivery status must be Open.

◗ To auto-create deliveries:

1. Navigate to the Query Manager window, and do a search to find the delivery lines that you want to add to a new delivery.

   The delivery lines are displayed in the Shipping Transactions window.

2. Select the delivery lines for which you want to create a delivery.

   Note: If you are assigning a ship set or a ship model complete configuration to a delivery, you must assign the entire ship set or ship model complete configuration to the delivery to keep the entire ship set or ship model complete configuration together.

   If you assign a delivery line that is part of a ship set or ship model complete configuration to a delivery by itself, the ship set or ship model complete configuration will no longer exist.

3. Choose the Go button to add the delivery lines to a new delivery.

   The Delivery Name field is filled for each line.

4. Navigate to the Delivery tab.
5. Define any additional information for the delivery.
6. Save your work.

Auto-packing Delivery Lines assigned to Deliveries into Containers

You can auto-pack delivery lines assigned to a delivery into containers. When you auto-pack a delivery, the delivery lines are grouped together by various attributes like the Ship To location and packed into containers based on the grouping and container type.

The system groups delivery lines as an intermediate step if delivery lines are assigned to containers, but you are not ready to Ship Confirm the delivery. The delivery must be pick released and no delivery lines details are required. Once a delivery is packed, you cannot change any delivery lines unless you unpack the delivery. If Weight/Volume Calculation in Shipping Parameters is set to Automatic, the weight and volume is calculated when the delivery is packed.

Prerequisites

❑ All delivery lines must be assigned to a delivery.

◗ To auto-pack delivery lines assigned to deliveries into containers

1. Navigate to the Query Manager window, and do a search for the delivery you want to pack.

   The delivery displays in the Shipping Transactions window.

2. From the Actions menu, select Auto-pack.

3. Choose the OK button.

   The delivery lines assigned to the delivery are packed into containers.

4. Save your work.

Packing Delivery Lines for a Delivery

Packing delivery lines verifies that delivery lines are packed into containers, and prevents changes to containers / lines assigned to containers within the delivery.

Once a delivery is packed, you cannot change any delivery lines unless you unpack the delivery. If Weight / Volume Calculation in Shipping Parameters is set to Automatic, the weight and volume is calculated when the delivery is packed.

Prerequisites

- ❏ The delivery must be open.
- ❏ At least one delivery line must be assigned to the delivery you want to pack.
- ❏ All delivery lines in the delivery must be packed into containers.

◗ To pack an entire delivery without details required:

1. Navigate to the Query Manager window, and do a search for the delivery you want to pack.

   The delivery displays in the Shipping Transactions window.

2. From the Actions menu, select Pack.

   Shipping Execution verifies that the delivery lines are packed into containers.

3. Choose the OK button.
4. Save your work.

Unpacking a Delivery

You can unpack delivery line items if you want to modify the delivery lines assigned to a Packed delivery. Unpacking returns the delivery to the status it held prior to packing.

To unpack a delivery:

1. Navigate to the Ship Confirm Delivery window, and do a search for the Delivery you want to unpack.
2. Choose Change Status.

   The Delivery Status window displays.
3. Select the Unpack toggle.
4. Choose OK to unpack the delivery.

Calculating Weight and Volume for a Delivery

The weight and volume of a delivery can be automatically or manually calculated depending on the default set up in the Shipping Transaction tab in the Shipping Parameters window:

- If *Automatic* is selected, the weight and volume is calculated automatically when the status of the trip or delivery is packed, ship confirmed, or the status changes to Planned.
- If *Manual* is selected, the weight and volume must be manually calculated.

Shipping Execution calculates the following:

- Calculates the weight, volume, and fill percentage of each open delivery and adds the values to the trip's current weight, volume, and fill percentage.
- Validates that the maximum load weight, the maximum internal volume, and the maximum fill percentage are not exceeded.
- Validates that minimum fill percentage requirements are attained.

  The Actual fill percentage can only be calculated if you have specified a vehicle for the trip.

Prerequisites

- ❑ All delivery lines must be assigned to deliveries.
- ❑ Delivery status must be Open.
- ❑ The Volume and Weight Unit of Measure fields must be defined for the trip and / or delivery.

◗ To calculate weight and volume for a delivery (manually):

1. Navigate to the Query Manager window, and do a search for the delivery.

   The delivery displays in the Shipping Transactions window.
2. From the Actions menu, select Calculate Weight / Volume.
3. Choose the Go button.

   The weight and volume are calculated and you can view the information in the Stops tab, Contents by Delivery tab, or the Contents by Line / Container tab.
4. Save your work.

Note: If you selected Automatic in the Weight / Volume Calculation field in the Shipping Parameters window, the calculation is done automatically and does not require you to manually calculate the values.

Generating a Loading Sequence for Delivery Lines in a Delivery

You can generate a loading sequence for delivery lines within a delivery by selecting the Generate Loading Sequence item from the Actions menu. The loading sequence defines the order in which the delivery lines are loaded into containers. Generate Loading Sequence updates loading sequence information for a delivery with an existing loading sequence defined.

The loading sequence you generate only applies to the lowest level of packing (loading). For example, if a Detail container is specified for a delivery line, the loading sequence describes what the position of the item is in that container. If a container is not specified, the loading sequence describes what the position of the item is in the vehicle.

If an item is loaded into a container first and then into a vehicle, a loading sequence will not be available for the container. However, the loading sequence of the containers can be derived by reviewing the vehicle load sheet, which prints the loading sequence in the correct order.

Prerequisites

- ❏ The status of the delivery must be open.
- ❏ The Lines Loading (located on the Delivery tab) must be defined for the delivery and the Customer Production Sequence number (located on the Lines / Containers tab) must be defined for the delivery lines assigned to the delivery.

  Note: You can manually define the Lines Loading in the Delivery tab. The Customer Production Sequence number can be defined in one of two ways: the number can be defined for the order line at the customer site and the order line can then be imported via Order Import, or you can define the number in the Others tab in the Sales Orders window.

- ❏ You must assign containers to each of the delivery line items.
- ❏ You must calculate the weight and volume of the delivery and / or trip.
- ❏ The Volume and Weight Unit of Measure fields must be defined for the trip and / or delivery.

To generate a loading sequence for deliveries:

1. Navigate to the Query Manager window, and do a search for the delivery containing the delivery lines for which you want to generate a loading sequence.

   The delivery displays in the Shipping Transactions window.

2. Select the order in which you want your lines placed into containers from the Lines Loading list on the Delivery tab.

3. From the Actions menu, select Generate Loading Sequence to create a loading sequence for the delivery lines in the delivery.

4. Save your work.

Example of Loading Sequence Generation

Assume you have the following 6 delivery lines with unique production sequence numbers.

Customer Production Sequence Number	22	23	24	25	26	27
Delivery Line	1	2	3	4	5	6

If each container can only hold 2 items, the following loading sequence will be generated for each given loading order.

Container	**1**	**1**	**2**	**2**	**3**	**3**
Loading Order = Forward	1	2	3	4	5	6
Loading Order = Reverse	6	5	4	3	2	1
Loading Order = Forward Invert	2	1	4	3	6	5
Loading Order = Reverse Invert	5	6	3	4	1	2
Loading Order = Reverse	6	5	4	3	2	1

Printing a Document Set for a Delivery

You can print a group of shipping documents and other reports in a set. After you select a document set, you can print the documents automatically. These document sets can include ship confirm and pick release information, for example, pick release documents, all shipping documents, and pack slip information.

◗ To print a document set for a trip:

1. Navigate to the Query Manager window, and do a search for the delivery.

   The delivery meeting the selected find criteria displays in the Shipping Transactions window.

2. From the Actions menu, select Print Document Set.
3. Choose the Go button.

   The Document Sets window appears.

4. Select the document set you want to print.
5. Choose the OK button to print the document set.

Assigning Deliveries to a Trip

You can assign a delivery to an existing trip by defining a trip for a delivery when you create the delivery in the Delivery window. Alternately, you can define a trip for an existing delivery in the Delivery window.

Prerequisites

- ❑ Status for the trip must be Open.
- ❑ Status for the trip must be Delivery must be Open.

◗ To assign a delivery to a trip:

1. Navigate to the Query Manager window, and do a search for the delivery.

   The delivery displays in the Shipping Transactions window.

2. From the Actions menu, select Assign to Trip.

   The Assign Deliveries to Trip window appears. You can enter the information about the trip to which you want to assign the delivery.

3. Select the Trip.
4. In the Pickup region, enter the location where the goods are picked up for the delivery.
5. In the Dropoff Stop region, select the location where the goods for the delivery are dropped off.
6. Select the OK button.
7. Save your work.

Unassigning a Delivery from a Trip

You can unassign a delivery from a trip by removing the trip name for a delivery in the Delivery window.

Prerequisites

- ❏ Trip status for the delivery you want to unassign must be Open.
- ❏ Delivery status must be Open.

◗ To unassign a delivery from a trip:

1. Navigate to the Query Manager, and do a search for the delivery you want to unassign.

   The delivery displays in the Deliveries tab of the Shipping Transactions window.

2. From the Actions menu, select Unassign from Trip.
3. Click the Go button.
4. Save your work.

Closing a Delivery

You can close an open or planned delivery. When you close a delivery, Shipping Execution sets the status of the delivery to Closed.

Note: Once a delivery is closed, no further actions can be performed on the delivery.

◗ To close a delivery:

1. Navigate to the Query Manager window, and do a search for the delivery you want to unassign.

   The delivery displays in the Deliveries tab of the Shipping Transactions window.

2. From the Actions menu, select Close.
3. Choose the Go button to change the status of the delivery.
4. Save your work.

Planning a Delivery

You can plan a delivery once delivery lines have been assigned to the delivery. Planning a delivery prevents changes from being made to the delivery. You must unplan the delivery to make changes.

Prerequisites

- ❑ At least one delivery line must be assigned to the delivery.
- ❑ Delivery status must be Open.

◗ To plan a delivery:

1. Navigate to the Query Manager window, and do a search for the delivery.

   The delivery meeting the selected find criteria displays in the Deliveries tab of the Shipping Transactions window.

2. From the Actions menu, select Plan.
3. Choose the Go button.
4. Save your work.

Unplanning a Delivery

You can unplan a delivery to unassign delivery lines. When you unplan a delivery, Order Management:

- Deletes any container information for the delivery
- Sets the status of the delivery to Open

> **Note:** All remaining delivery lines stay assigned to the delivery when you unplan a delivery.

Prerequisites

- ❑ The delivery cannot be Closed or Cancelled.
- ❑ All delivery lines assigned to the delivery must be available to release.

◗ To unplan a delivery:

1. Navigate to the Query Manager window, and do a search for the delivery.

   The delivery displays in the Deliveries tab in the Shipping Transactions window.

2. Select Change Status.

   The Delivery Planning Status window displays.

3. Select the Unplan toggle.
4. Choose OK to change the status of the delivery.
5. Save your work.

Re-opening a Delivery

You can re-open a ship-confirmed delivery (as long as the Stop containing the delivery is still open) to modify details for the delivery. You can modify and re-ship confirm the delivery.

Prerequisites

- ❑ The delivery cannot be Closed.

◗ To re-open a delivery:

1. Navigate to the Query Manager window, and do a search for the delivery.

   The delivery displays in the Shipping Transactions window.

2. From the Actions menu, select Re-open.
3. Save your work.

Ship Confirming a Delivery

Ship Confirm is the process of recording whether items have been shipped or backordered. You can ship confirm (or backorder) a delivery and associated delivery lines. The fastest way to ship confirm multiple deliveries and delivery lines is to confirm an entire delivery and close all the delivery lines associated with the delivery.

The options in the Confirm Delivery window provides flexibility for processing deliveries with many delivery lines, and automates many of the manual-entry processes. For example, when the *Ship Entered Quantities, Ship Unspecified Full* option is selected at ship confirm, the shipped amounts are automatically processed so that each delivery line with a NULL value displays as fully shipped. This saves processing time because you do not have to manually enter each item as fully shipped. In the Confirm Delivery window, you can choose from many ship confirm options to assist your requirements.

You can automatically create a trip and its stop for a delivery during Ship Confirm if the delivery is not already assigned to a trip.

Prerequisites

- ❏ Delivery lines must be released.
- ❏ Delivery must be open or packed.
- ❏ At least one delivery line must be assigned to the delivery.

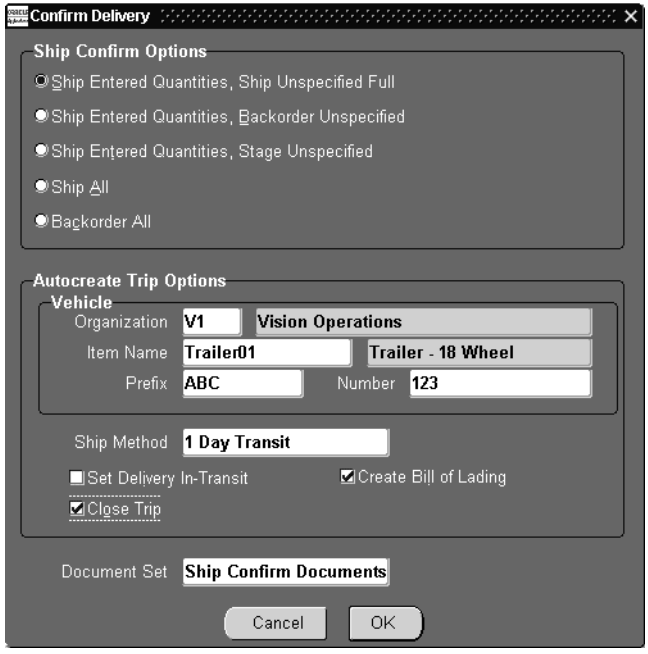
◗ To ship confirm a delivery

1. Navigate to the Query Manager window, and do a search for the delivery.

   The delivery displays in the Shipping Transactions window.

2. From the Actions menu, select Ship Confirm.

The Confirm Delivery window displays the ship confirm options.



3. Select one of the following options:

- *Entered Quantities, Ship Unspecified Full:* Ship confirms the quantity of items specified in the Shipped Quantity field and treats null values as full quantity (shipped quantity = requested quantity). For example, if the Requested Quantity is 10 and the Shipped Quantity field is null (no values entered), the full quantity (10) is shipped (displays in the Shipped Quantity field).
- *Ship Entered Quantities, Stage Unspecified:* Ship confirms the quantity of items specified in the Shipped Quantity field and treats null values as full quantity in the Stage Quantity field (stage quantity = requested quantity). For example, if the Requested Quantity is 10 and the Shipped Quantity field is null (no values), the full quantity (10) displays in the Stage Quantity field.
- *Ship Entered Quantities, Backorder Unspecified:* Ship confirms the quantity of items specified in the Shipped Quantity field and treats null quantities as full backorders (backorder quantity = requested quantity). For example, if

the Requested Quantity is 10 and the Shipped Quantity field is null (no values), the full quantity (10) is backordered and displays in the Backordered Quantity field.

- *Ship All:* Ship confirms the entire quantity regardless of what was entered in the Shipped Quantity field (shipped quantity = requested quantity). For example, if the Requested Quantity is 10 and the Shipped Quantity field is 5, the full requested quantity is shipped (10) and displays in the Shipped Quantity field.
- *Backorder All:* Backorders the entire quantity irrespective of what was entered (shipped quantity = 0, backorder quantity = requested quantity).

Optionally, if a trip has not been created for the delivery, you can auto-create a trip by completing your entries in the Auto-create Trip Options region:

4. Select the organization to which you want to assign the trip.
5. Select the type of vehicle.
6. Select the prefix and number for the vehicle.
7. Select the ship method.
8. Enable the Set Delivery In-transit and / or the Close Trip box:

   Set Delivery In-transit: Creates a trip and stops for the delivery. Closes first stop of the delivery, but leaves second stop open. Sets status of delivery to In-transit and initiates Order Management (OM) and Inventory interfaces.

   Close Trip: Creates a trip and stops for the delivery. Closes trip, all stops, and the delivery.
9. Enable the Create Bill of Lading box if you want to create a Bill of Lading.
10. Select the document set you want printed for the delivery.
11. Choose the OK button.

    A trip and related stops are created for the delivery.
12. Save your work.

6

Managing Containers and Delivery Lines

Overview of Managing Containers

In the Shipping Transactions window, you can create and manage containers at any point in the shipping process, and automatically create and pack containers using container-load relationships established in the Container-Item Relationships window. As part of Container Management, you can create new containers without having to assign them to a delivery. This is useful if you want to create multiple containers of the same type then pack them with delivery lines that have not been assigned to a delivery.

You can pack multiple containers with multiple lines, then using the Packing Workbench, automatically fill the containers using one of the following methods:

- *Equal packing:* splits the delivery lines equally between the selected containers.
- *Sequential packing:* fully packs one container at a time to its capacity (weight, volume, or quantity) before packing the next selected container.

You can assign a unique identification number / label (container name) to a new container (automatically or manually), pack containers with or without assignment to a delivery, estimate and pack the number of containers required for a delivery line / item, pack multiple lines into multiple containers, assign containers to deliveries, and Pick Release containers. You can also automatically create and pack both the detail and master containers required for a delivery line.

Naming Containers

You can identify each container with a unique identifying number/string called the container name to label, identify, and track individual containers. A default container name is automatically generated by the system but the name can be changed to meet your business needs.

However, the container name must follow a standardized format similar to the following example:

Prefix	Base Number	Quantity	Suffix
VIS	1001	10	Box

In the example shown above, the system would generate 10 container names starting with VIS1001BOX and ending with VIS1010BOX.

Multiple instances of containers can be created at the same time using the Create Container window, though after creation, only the individual containers are visible. Multiple instances of containers can be created without assigning them to deliveries or without having to pack them immediately. The containers can be created independently and can be queried later for assignment or packing.

The Create Container window contains a quantity field that can used to specify the number of containers that need to be created. The window automatically displays the summary record to create the specified number of individual containers. You can only work with single containers and cannot re-query the summary record once exploded. Once you have created a container(s), you can make changes to an individual container in the Lines/Containers tab in the Shipping Transactions window.

The containers and lines can be queried using the Query Manager and are displayed in the Lines/Containers tab in the Shipping Transactions window.

Creating a Container

You can create new containers without having to associate the containers to a delivery. This will enable you to pack lines not yet assigned to a delivery.

Order lines, not pick-released, can be assigned / packed to containers. That enables you to run a pick-release batch by container name. This container management solution enables you to pack multiple containers with multiple lines in one transaction.

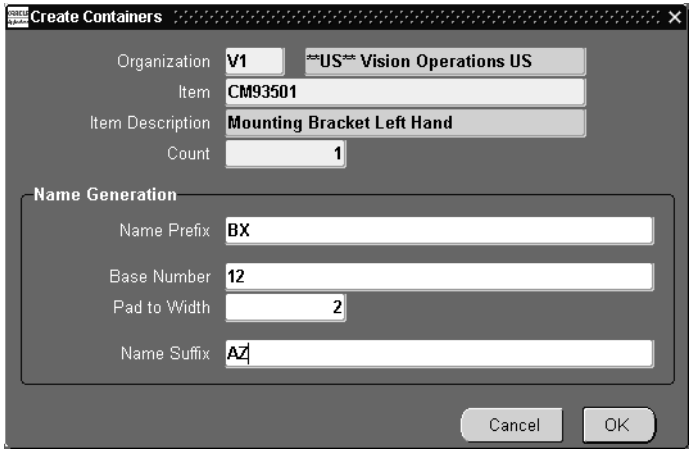
The estimate of containers for unpacked lines has been upgraded to consider both the detail and master containers required for a delivery-line. The Shipping Transactions window manages both the containers and lines through the lines / containers tab page. Multiple instances of containers can be created without assigning them to deliveries or without having to pack them immediately. The containers can be created independently and can be queried later for assignment or packing.

◗ To create containers:

1. Navigate to the Query Manager window, and do a search to find the lines / containers.

   The lines / container(s) display in the Shipping Transactions window.

2. From the Actions menu, select Create Containers.
3. Click the Go button. The Create Containers window appears.



4. Select the organization for the container.
5. Select the item for the container.
6. Enter the count for the container.
7. Enter a prefix for the container name.
8. Enter the base number for the container name.
9. Enter the total number of digits (length of numeric string) you want to use for your container name in the Pad to Width field.
10. Enter a suffix for the container name.
11. Click the OK button. A new container is created.
12. Save your work.

Note: You can also create containers from the Shipping Transactions window by clicking on the Container Data Entry folder and then following the steps above.

Assigning Freight Costs to a Container

You can assign new freight costs to a container, override the suggested amounts, or update existing freight costs. For example, you may need to add additional costs like Duty Fee or Priority Handling for a particular container. A freight cost can be assigned to a delivery, a stop, or a delivery detail.

Prerequisites

- ❑ A container must exist.

◗ To assign freight costs for a container:

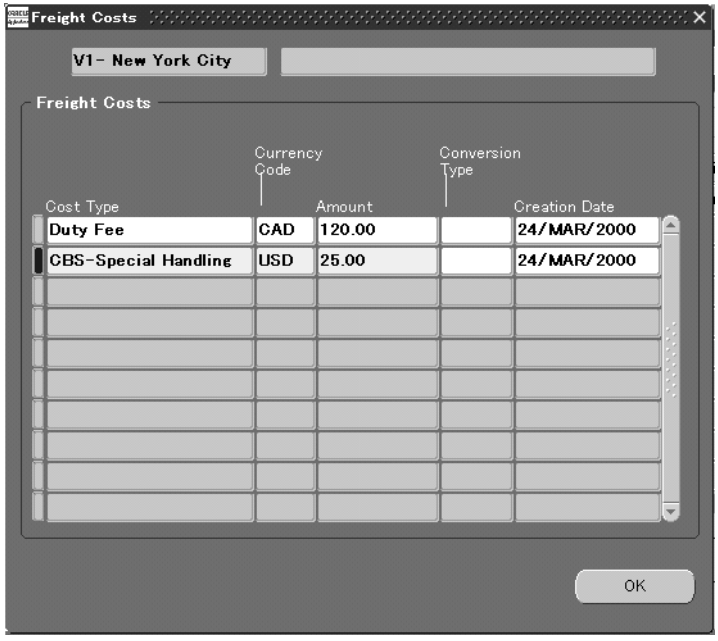
1. Navigate to the Query Manager window, and do a search to find the container.

   The container displays in the Shipping Transactions window.

2. From the Actions menu, select Freight Costs.

3. Choose the Go button.

   The Freight Costs window appears. In this window, you can enter freight costs for the container.



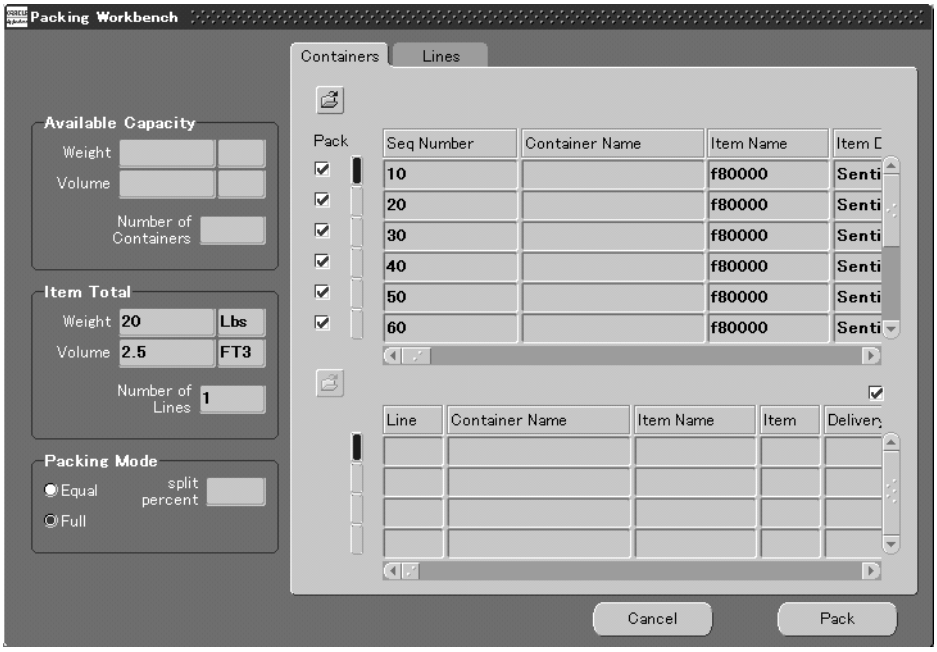
4. Enter the Cost Type, Currency Code, Amount, and Conversion Type.
5. Choose OK.

   At ship confirmation, the freight cost is applied and the information is transferred to Order Management when the associated Stop is closed.

Packing Workbench

You can use the Packing Workbench to split the delivery lines between containers or to pack sequentially, packing one container at a time to its capacity.

The packing workbench window consists of two tab pages - one displays containers and its contents and the other displays the delivery lines. The packing workbench displays the total weight and volume of containers and delivery lines that can help the user determine the appropriate number of delivery lines and containers.



The containers and lines multi-record displays have checkboxes next to each record to indicate whether a particular container or line has been selected for packing. As the containers are selected / deselected, the total available weight / volume is recalculated, similar to when the delivery lines to be packed are selected / deselected, the total net weight / volume of all the lines is re-calculated and displayed.

By matching the total net weight / volume of all lines with the total available weight / volume of the containers, the user can determine whether they can pack the selected delivery lines in the available number of containers. Matching weights and

volume does not guarantee that all the selected lines will be packed into the selected containers. Due to incompatibilities or differences in grouping attributes of the different lines and containers, there could be lines that are unpacked at the end of the packing operation.

To assign / pack a number of lines into one or more containers, the packing can be performed using two different algorithms; one method is based on the sequential packing of the lines into the specified containers, and the other involves an equal packing of all the lines into the containers.

Equal Packing Delivery Lines into Containers

You can split the delivery lines equally between the selected containers so that each of the resulting split lines (from every delivery line) is packed into each available container. This results in a packing in which every container is packed with items from every delivery line. Every container will have the same quantity of a particular delivery line item. This method of packing is useful if you have a number of lines (each with a different item) which may need to be grouped together at shipment time. For example, if the different parts of a home computer are on separate order lines, the items could be packed into one box for shipping purposes.

A selected delivery line is split equally by the number of containers and every line is packed into all the containers in a one to many relationship, provided the container grouping attributes are satisfied by the line. The preferred container specified on the delivery line or the container load-relationship is ignored. This method of packing could result in a gross over-packing or under-packing. If the containers are over-packed or under-packed, a warning appears. Again, this packing method could result in delivery lines that remain unpacked at the end of the packing operation because of incompatibilities in grouping attributes of lines and containers.

◗ To equally pack delivery lines into containers:

1. Navigate to the Query Manager window, and do a search to find the container(s) you want to pack.

   The delivery lines and containers display in the Shipping Transactions window.

2. Select the delivery lines and containers. To select more than one, press the CTRL key and select the lines and containers you want.
3. From the Actions menu, select Packing Workbench.
4. Click the Go button.

5. In the Packing Mode region of the Packing Workbench window, choose Equal.
6. Click the Pack button.
7. Save your work.

Sequential Packing Delivery Lines into Containers

You can fully pack one container and then proceed to pack the next container. When packing multiple lines into multiple containers the packing is performed one container at a time. The first delivery line is packed into the first container until the container is full or the line is completely packed. If the line is completely packed then the next line is packed into the same container until the container is full.

If the container is fully packed before the line is completed (only partial quantity fits), then the line is split so that the split line now fills up the first container and the remaining quantity of the original line is packed into the next container. This is continued until all the lines have been packed or all the containers are full. If the containers are full before all the lines can be packed, the remaining lines are left unpacked. A warning will be issued to inform the user that some lines were left unpacked.

◗ To sequentially pack delivery lines into containers:

1. Navigate to the Query Manager window, and do a search to find the container(s) you want to pack.

   The container displays in the Shipping Transactions window.
2. From the Actions menu, select Packing Workbench.
3. Click the Go button.

   The Packing Workbench window displays the container.
4. Select the Lines tab where the lines are displayed.
5. Select the delivery lines you wish to pack into the containers.
6. In the Packing Mode region, choose Full.
7. Click the Pack button.

Assigning a Container to a Delivery

You can assign a container to an existing delivery by searching for the container and adding it to a delivery.

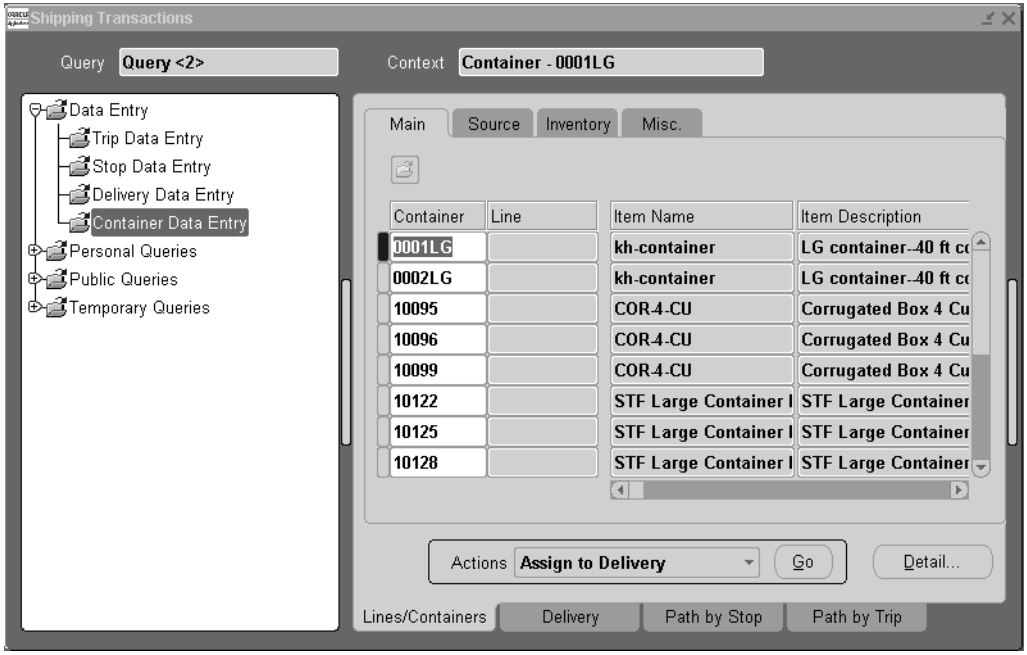
Prerequisites

- ❑ Delivery status must be set to Open.
- ❑ A delivery must already be created.

◗ To assign a container to a delivery:

1. Navigate to the Query Manager window, and do a search to find the container.

   The container displays in the Shipping Transactions window.



2. From the Actions menu, select Assign to Delivery.
3. Click the Go button. The Deliveries window appears.
4. Select the Delivery to which you want to assign the container.

5. Click the OK button. The container is assigned to the delivery.

Unassigning a Container from a Delivery

You can unassign a container by searching for the container and unassigning it from a delivery.

Prerequisites

- ❑ Delivery status must be set to Open.
- ❑ A delivery must already be created.

◗ To unassign a container from a delivery:

1. Navigate to the Query Manager window, and do a search to find the container.

   The container displays in the Shipping Transactions window.
2. From the Actions menu, select Unassign from Delivery.
3. Click the Go button. The container is unassigned from the delivery.
4. Save your work.

Auto-packing Delivery Lines into Containers

You can autopack the required number of containers for the delivery line based on either the container-load relationship or the preferred container item. The preferred container item is set-up in Oracle Inventory.

Auto-packing creates the required number of containers and assigns / packs the delivery lines into the containers. If a container is specified on the delivery line, that container is used. If not specified, the container is determined by the default container-load relationship for that delivery line item. The container-load relationship can be created with multiple container-items, and is set by enabling the preferred-flag in the Container-Load Relationships window.

If a container is specified for auto-packing, but no container-load relationship is defined between the item and the container, the number of containers is estimated based on the weight and volume restrictions of the container.

Auto-pack Master option

If you choose just Auto-pack, then only the detail containers are created and packed. If you choose Auto-pack Master, the delivery line is packed into the detail container, and the detail container is then packed into the parent / master container in one action. The Auto-pack Master option is available from the Actions menu in the Lines / Containers tab in the Shipping Transactions window. It is also available at the delivery level.

◗ To autopack delivery lines into containers:

1. Navigate to the Query Manager window, and do a search to find the delivery lines.

   The delivery lines display in the Shipping Transactions window.

2. Select one or more lines.

3. From the Actions menu, choose one of the following:

   - Auto-pack
   - Auto-pack Master

4. Click the Go button.

   The lines are auto-packed into containers. If you selected Auto-pack Master, the detail containers are packed into the parent / master containers.

5. Save your work.

Overview of Delivery Lines

You can find delivery lines, assign delivery lines to a delivery, unassign delivery lines from a delivery, and assign delivery lines to containers.

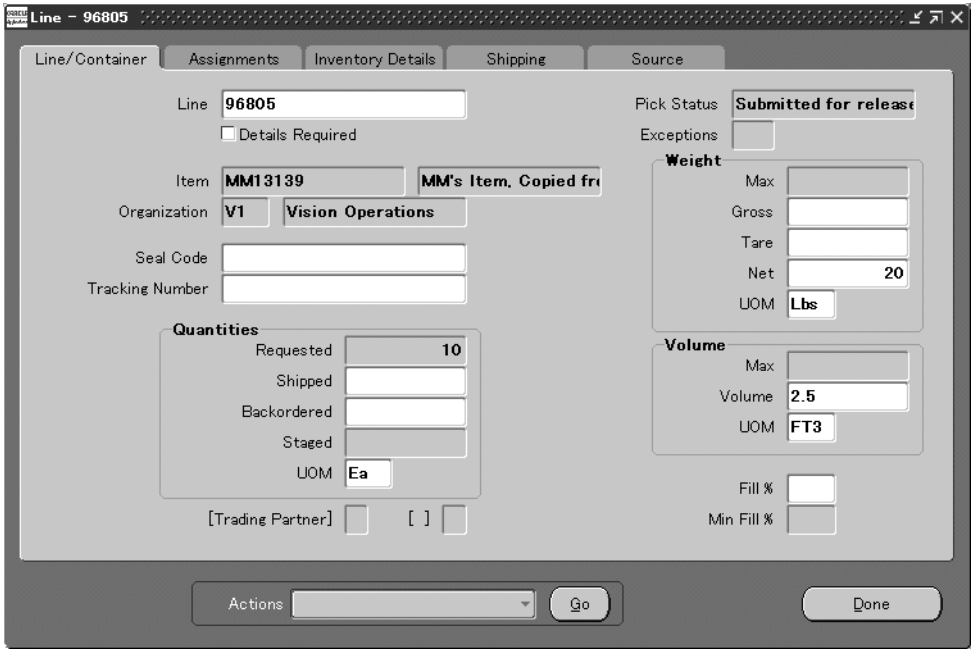
Assigning Freight Costs to Delivery Lines

Freight costs are shipment-related costs such as insurance, duty fee, special handling, or priority service. You can assign freight costs to delivery lines at any time even after ship confirmation. However, costs assigned after ship confirmation are not passed as freight costs to Order Management; instead, they are stored in the shipping system for future reference.

Although freight costs can be defined in any currency, only the currency that is defined is displayed. When costs are passed to Order Management, the currency is converted to the order header currency.

◗ To assign freight costs to delivery lines:

1. Navigate to the Query Manager window, and do a search for the delivery lines.



The delivery lines display in the Shipping Transactions window.

2. From the Actions menu, select Freight Costs.
3. Choose the Go button.

The Freight Costs window appears. In this window, you can enter freight costs for the delivery lines.

4. Enter the Cost Type, Currency Code, Amount, and Conversion Type.
5. Choose OK.

   At ship confirmation, the freight cost is applied and the information is transferred to Order Management.

   Note: Costs assigned after ship confirmation are not passed as freight costs to Order Management; instead, they are stored in the shipping system for future reference.

6. Save your work.

Pick Releasing Delivery Lines

During pick release, delivery lines are released for shipment based on the release and shipping criteria. In addition to pick releasing by trip, delivery, and container, you can also pick release by delivery lines. If the stop and delivery are not specified, only lines which are not assigned to the delivery are selected for release. If stop and delivery are specified, all selected lines meeting the release criteria, whether they are assigned to a delivery or not, are released.

To pick release delivery lines:

1. Navigate to the Query Manager window, and do a search for the delivery lines.

   The delivery lines display in the Shipping Transactions window.

2. Select the delivery lines you want to pick release.
3. From the Actions menu, select Launch Pick Release.
4. Click the Go button.

   The selected delivery lines are pick released and the Messages box displays if the pick release was successful or failed.

See Also

Pick Release on page 7-1.

Splitting Delivery Lines

You can split shipments for certain customer requirements. For example, if your customer wants part of the ordered quantity delivered on a different date or to a different location the original shipment can be split into two to meet the required changes. This is more convenient than reducing the quantity of the original shipment and adding a new shipment.

In another example, if a stock picker finds only a partial quantity when picking inventory to fill a given Order Line, the delivery lines could be split so that the partially processed part can progress further through the Order process.

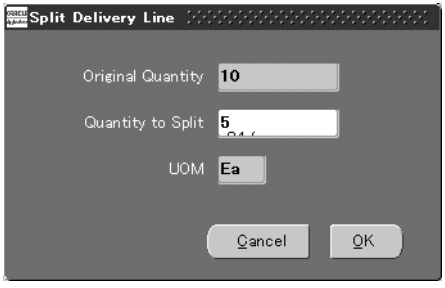
◗ To split delivery lines:

1. Navigate to the Query Manager window, and do a search for the delivery line(s) you want to split.

   The delivery lines display in the Shipping Transactions window.

2. Select the delivery line you want to split.
3. From the Actions menu, select Split Line.
4. Click the Go button.

   The Split Delivery Line window displays the original quantity.



5. Enter the quantity you want to split.

   For example, if you split three 3 items from a delivery line consisting of 10 items, two delivery lines would result: one of seven items, and the second of three.

6. Click the OK button.

   The delivery lines are split into two lines.

7. Save your work.

Auto-creating Deliveries for Delivery Lines

You can automatically create deliveries for delivery lines that have been successfully released for shipment. Lines are grouped onto deliveries based on the grouping attributes that you specify in the Shipping Parameters window.

Note: The delivery lines cannot be assigned to an existing delivery.

◗ To auto-create deliveries for delivery lines:

1. Navigate to the Query Manager window, and do a search for the delivery lines.

   The delivery lines display in the Shipping Transactions window.

2. Select the delivery lines for which you want to create a delivery.
3. From the Actions menu, select Auto-create Deliveries.
4. Click the Go button.

   The delivery(s) are created for the selected lines based on the delivery grouping rules set up in the Shipping Parameters window.

5. Save your work.

Auto-creating a Trip for Delivery Lines

You can automatically create trips for delivery lines. Auto-creating trips automatically creates a trip, stops, deliveries and delivery legs for selected delivery lines.

Prerequisites

- ❑ The delivery lines cannot be assigned to an existing delivery or trip.

◗ To auto-create a trip for delivery lines:

1. Navigate to the Query Manager window, and do a search for the delivery lines.

   The delivery lines display in the Shipping Transactions window.

2. Select the delivery lines for which you want to create a trip.
3. From the Actions menu, select Auto-create Trip.

   A trip is created for the selected delivery lines. You can view the trip name that has been created for the delivery lines in the Path by Stop tab in the Shipping Transactions window.

4. Save your work.

Assigning Delivery Lines to a Delivery

You can assign delivery lines to an existing delivery.

Prerequisites

- ❑ The delivery lines cannot be assigned to an existing delivery.

◗ To assign delivery lines to a delivery:

1. Navigate to the Query Manager window, and do a search for the delivery lines.

   The delivery lines display in the Shipping Transactions window.
2. Select the delivery lines you want to add.
3. From the Actions menu, select Assign to Delivery.
4. Choose the Go button.

   The Deliveries window appears.
5. Select the delivery to which you want to assign the delivery lines.

   The delivery lines are assigned to the selected delivery.
6. Save your work.

Unassigning Delivery Lines from a Delivery

You can unassign selected delivery lines from a delivery.

- ❑ The delivery lines must be assigned to an existing delivery.

◗ To unassign delivery lines from a delivery:

1. Navigate to the Query Manager window, and do a search to find the delivery lines.

   The delivery lines display in the Shipping Transactions window.

2. Select the delivery lines that you want to unassign from the delivery.

3. From the Actions menu, select Unassign from Delivery.

   This unassigns the delivery lines from the delivery.

   Note: You can also unassign a delivery line from a delivery by deleting the Delivery name from the delivery line in the Delivery Lines for Delivery *(Delivery Name)* window.

4. Save your work.

Calculating Weight and Volume for Delivery Lines

You can calculate the weight and volume for selected delivery lines.

Prerequisites

- ❑ All delivery lines must be assigned to deliveries.
- ❑ Trip status must be set to Open.

◗ To calculate weight and volume for delivery lines:

1. Navigate to the Query Manager window, and do a search to find the delivery lines.

   The delivery lines display in the Shipping Transactions window.
2. Select the delivery lines for which you want to calculate weight and volume.
3. From the Actions menu, select Calculate Weight/Volume.
4. Choose the Go button.

   The weight and volume are calculated for the selected delivery lines.
5. Save your work.

7

Pick Release

Overview of Pick Release

You can use Pick Release to release order lines for shipment based on the release criteria in shipping. Pick Release finds and releases eligible delivery lines that meet the release criteria, creates Move Orders that move the inventory to staging areas, and optionally calls Inventory Pick Release to reserve items and print the pick slips and Inventory Pick Confirm to confirm the pick.

You can run as many releases as you want and customize releases to meet your requirements. You can define Release Sequence Rules, which specify the order in which eligible delivery lines are released during Pick Release. You can also define Pick Slip Grouping Rules, which determine how released move order lines are grouped onto pick slips.

You can release delivery lines by order, trip, stop, container, delivery, warehouse, customer, schedule or requested dates, shipment priority or combinations of the above criteria.

Pick Release can be run using the following methods:

- *On-line:* You can pick release one order immediately, thereby eliminating time spent waiting for the order to process through the Concurrent Manager queue.
- *Concurrently:* You can run pick release through the Release Sales Orders function. You can run Release Sales Orders for Picking in the background, allowing you to run other processes simultaneously.
- *Standard Report Submission (SRS):* You can run a specific release at the same time every day. SRS runs pick release in the background multiple times.
- *Shipping Transactions window:* The order lines must be in the shipping activity for the delivery line to indicate a Ready to Release Pick status.

Move Orders

A Move Order is a request for a subinventory transfer or account issue. The Pick Release process now creates Move Orders. These Pick Wave Move Orders are pre-approved requests for subinventory transfers to bring material from its source locations in the warehouse to a staging subinventory. Reservations created for sales orders are automatically updated and transferred for the user as the Move Order is released and transacted.

Picking Rules

Move Orders will use the Picking Rules set up in Oracle Inventory to locate the material required to fulfill the Move Order Line. Together with item-subinventory defaults (required if the staging subinventory is locator controlled), the Picking Rules suggest the staging transfer transaction lines with appropriate source information that will be required to obtain enough material in the staging location for the delivery. The process by which the Picking Engine generates these transaction line suggestions is called Detailing.

Staging Locations

The destination subinventory on the Pick Wave Move Order is the staging location into which the picked material should be deposited. Each organization should designate at least one staging subinventory. Each batch created at pick release will have the same destination staging subinventory. The default staging subinventory and locator to be used for all Pick Wave Move Orders are specified through Oracle Shipping Execution's Shipping Parameters window. This location can be changed at Pick Release. To model different staging lanes within the staging area, facilities may choose to either create different subinventories or designate staging lane locators within one staging subinventory.

Configuring Your Picking Process

You can determine the number of pick release steps the system will prompt to move material from Pick Release to Ship Confirmation. These steps are:

1. Pick Release
2. Move Order Line Detailing
3. Move Order Line Pick Confirmation
4. Ship Confirmation

Pick Release

Oracle Shipping Execution's Pick Release process creates Move Order. One order is created per pick release batch per organization, so if you pick release across multiple organizations, one move order is generated in each facility. One Move Order line is generated for each order line included in the picking batch. That Move Order line will include the item, quantity, the staging location (the destination subinventory and locator) and a source subinventory and locator if one was specified on the sales order line or on the Release Sales Orders window.

Detailing

To release the Move Order lines created at Pick Release to the warehouse and to print pick slips, the lines must be detailed. This process is called Detailing. The detailing process for a Pick Wave Move Order Line also creates a high level (organization level) reservation for the item(s) if no reservations previously existed. Users can choose to do this immediately after the Move Order Lines are created or to postpone this step until a later point in time. Postponing the detailing process might be employed by organizations that pick release across multiple warehouses but prefer to allow each warehouse to determine when to release their order lines to the floor. Detailing the order lines immediately after they are created is called auto-detailing. Postponing the detailing process is referred to as manual-detail. You can set up a default detailing mode in the Shipping Execution organization parameters. This default can be overridden at each Pick Release.

Pick Confirmation

The Move Order Line Details (transaction lines) created by the detailing process must be transacted to confirm the material drop-off in staging. This process is called Pick Confirmation. Pick confirmation executes the subinventory transfer that moves the material from its source location in the warehouse to the Staging location. Pick Confirmation automatically transfers the high level reservation to a detailed reservation (including lots, subinventory and locators) in the Staging location. At pick confirmation, a user can report a missing quantity or change the transaction line if the picker chooses to use material from a different lot, serial, locator, or subinventory. If an organization's picks rarely deviate from the suggested picking lines or the overhead of requiring a Pick Confirmation is unmanageable, the Pick Confirm transactions can occur immediately after the lines are detailed. This option is called auto pick confirm. Users can set up a default Pick Confirm policy in the Inventory organization parameters. This default can be overridden at each Pick Release. Note that even if an automatic pick confirm is employed, the material is only transacted to the Staging subinventory and reserved. A user can still manage any discrepancies found by deleting the reservation and

transacting the material back to its original subinventory. If mobile devices such as bar code scanners are used to perform Inventory transactions, it is suggested that you use manual pick confirmation for greatest inventory accuracy and control.

Ship Confirmation

The material picking process ends when the items are ship confirmed out of inventory. Ship confirming the items removes the existing reservations and performs the sales order issue transaction. A user may choose to ship confirm only part of the sales order quantity. In this case, the balance of the sales order may be backordered. Backordering at Ship Confirm automatically splits the sales order into two lines. The first line represents the shipped quantity, and the second line represents the backordered quantity. The backordered line is automatically Pick Released by Oracle Shipping Execution. A Move Order line is automatically generated for the backordered quantity.

You have the following options if the partial inventory quantity shipped is less than the requested quantity:

- When the partial quantity is not available due to inventory discrepancy or damage, you can enter the shipped quantity and the remaining quantity defaults to the backorder field on the line. Upon ship confirmation, the reservation is transferred to cycle count so the discrepant amount is not available to pick.
- You can enter the shipped quantity on the line, then enter the partial quantity in the Stage Quantity field on the line. The partial quantity remains in the staging subinventory with the reservation intact.

Serial Numbers

Detailing can suggest serial numbers to be transacted to fulfill the Pick Wave Move Order Line. A user can change the suggested serial numbers if the picker chose different serials. Some organizations, however, may choose to not suggest serial numbers and require the pickers to enter the numbers they have selected. This option is enabled using a Profile Option called INV: Detail Serials. If you choose not to detail serial numbers, any Pick Wave Move Order line for a serialized item will not be automatically pick confirmed and the picker will have to enter the serial numbers before the material is transacted into staging and becomes eligible for Ship Confirmation.

If all orders should be automatically pick confirmed, the profile option must be set to Yes. No reservations are placed on the specific serial numbers that are pick confirmed so if the picker chooses a serial number that was not recommended by

the system, the user can perform a subinventory transfer to move the correct serial number to the staging location and then perform another subinventory transfer to move the erroneous serial number back into the storage location. At Pick Confirmation, Oracle Shipping Execution collects the serial numbers that were transacted into staging and assigns them to the appropriate delivery line. It is no longer necessary to enter serial numbers at Ship Confirmation unless a change occurs and a user has decided to ship different units than those suggested.

Reservations

The material picking process also manages Supply Chain Reservations for the user. If no reservation was created prior to pick release through Oracle Order Management or Oracle Inventory, a high level (organization wide) reservation is placed on the item for that sales order. When the move order is transacted at pick confirmation, that reservation is transferred to a detail level (including locators, lots, revisions, and the staging subinventory) reservation in the staging location. It is thus advisable to make the staging locations a reservable subinventory.

Identifying Potential Shortages

If the Detailing process was unable to locate enough material to fulfill the Move Order Line, a shortage situation exists. A short Move Order line can be re-detailed through the Move Order Transaction window to allow the picker to direct it to another location or by re-releasing the Sales Order through Pick Release.

See also

Move Orders, *Oracle Inventory User's Guide*

Releasing Sales Orders for Picking

The Release Sales Orders for Picking window specifies the criteria for release of an order line. You can select order lines based on a number of criteria such as warehouse, shipment request date, and item. Shipping Execution only releases order lines which have met the prerequisites for Pick Release required by the Workflow status, minimally that the order containing the lines must be booked.

You must create two different rules that determine how Pick Release handles order lines / picking lines: Release Sequence Rules and Pick Slip Grouping Rules.

Release Sequence Rules specify the order in which eligible delivery lines are released. The order in which delivery lines are released using a Release Sequence Rule is based on the following attributes: order number, outstanding invoice value, schedule date, departure date, and shipment priority. For example, if you wanted to ensure that delivery line items with the earliest Schedule Ship Dates were released before any other similar items, you could create a Release Sequence Rule that would release items with the earliest schedule dates first and then select that rule during Pick Release. You must specify a Release Sequence Rule.

When you release a partial quantity of a delivery line, Pick Release releases the available quantity and creates a new delivery line consisting of the remaining quantity. For example, if you wanted to release a delivery line consisting of 10 items but only 6 items were available to release, Pick Release would release the 6 items and create a new delivery line consisting of the 4 remaining items.

If reservations are not available for a particular item, Pick Release leaves the item as submitted to inventory. Pick Release uses item attributes you define in Oracle Inventory, such as lot and locator control, to determine which attributes must be maintained when an item is released. If you place a reservation for an item and include some of the necessary inventory attribute information, Pick Release verifies the existing reservations and adds the outstanding required information. For example, if you are releasing an item under lot and locator controls and you reserve the item on-line to the lot level, Pick Release uses the lot you reserved to and automatically adds the locator to the reservation.

Pick Slip Grouping Rules define how Move Order lines are grouped together on a pick slip. You must specify a Pick Slip Grouping Rule.

There are two methods for running Pick Release from this window: on-line and concurrent. On-line releases an order, Trip, Trip Stop, or delivery immediately, thus eliminating time spent waiting for the order, Trip, Trip Stop, or delivery to process through the Concurrent Manager queue. Concurrent releases in the background for

multiple orders, Trips, or deliveries , thus allowing you to run other processes simultaneously.

Prerequisites

- ❑ You must book an order (order lines must be shippable and the line must have a shipping Workflow activity).

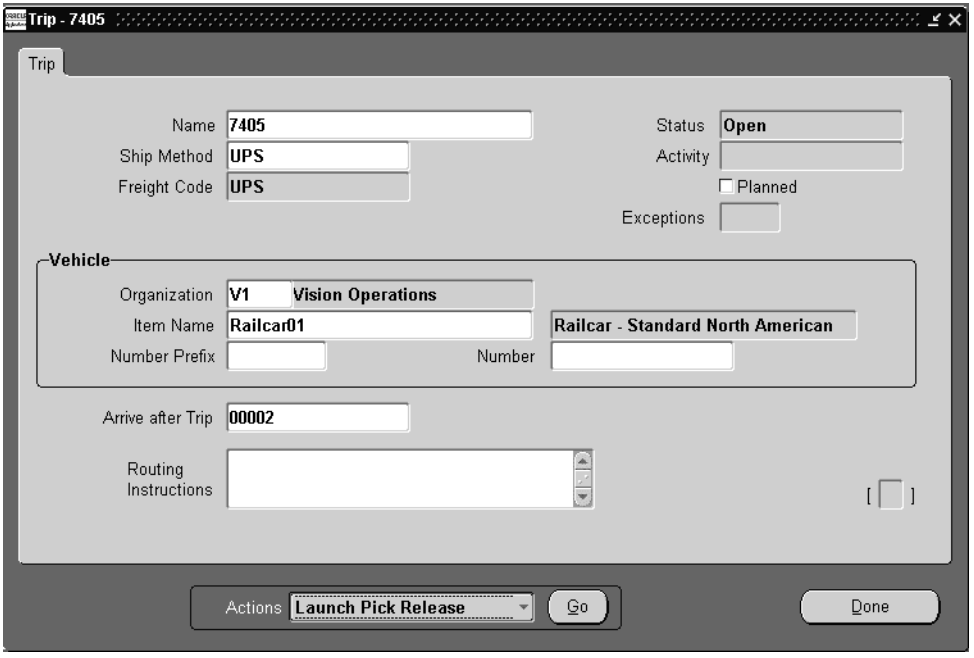
> **Note:** Credit checking and holds prevent an eligible order line from releasing until the order line is reviewed and removed from hold. For example, you may have a hold on defective products received from your supplier. Shipping Execution prevents release of order lines, even if they have passed all the cycle prerequisites, until the hold is removed. If credit checking is active at Pick Release, the order is evaluated to see if it violates your credit checking policies. If it does, the order is placed on hold and the lines are not released. If an order was previously on credit hold but no longer violates your credit checking policies, Pick Release automatically releases the order from credit hold and processes the appropriate order lines.

Pick Releasing All Delivery Lines for a Trip

You can pick release an entire trip automatically without having to pick release each warehouse independently. This is convenient if you want to pick release all deliveries and delivery lines.

◗ To pick release all delivery lines for a trip:

1. Navigate to the Trip window.



2. From the Actions menu, select Launch Pick Release.
3. Choose the Go button.

   Pick Release is launched and Pick Releases the deliveries and delivery lines for that trip.
4. Save your work.

Note: Alternate Pick Release methods:

- If you want to release only those delivery lines for a specific delivery within a trip. When you are in the Delivery window, select Pick Release Form from the Toolbar menu of the Shipping Transactions window.
- Navigate to the Release Sales Order window. Choose the Online or Concurrent button. You can also select the Release Sales Order SRS window rather than the Release Sales Order window.

To release a sales order concurrently:

1. Navigate to the Query Manager, and do a search for the trip.

   The trip displays in the Shipping Transactions window.

2. From the Tools menu, select Pick Release Form.
3. Complete your entries in the Release Sales Order for Picking window.
4. Choose the Concurrent button.

   Pick release is launched and pick releases the deliveries and delivery lines for the trip.

5. Save your work.
6. a release rule from the Based On Rule list to automatically define the remaining parameters on this window.

   If you have not created a release rule or do not want to use an existing release rule, leave this field blank and define the remaining parameters on the window. See also: Creating Release Rules.

In the Order Tab:

7. Select an Order Number if you want to release lines for a single order only.

   If you want to release a specific ship set, you must enter an order number in this field. Values for the Order Type and Customer fields of this window default to those for the order number you enter here. If you entered an Order Type before you entered the order number, you are restricted to order numbers that have the selected Order Type.

8. Select the Order Type you want to release.

9. Select the number of the specific Ship Set you want to release.

   You can only enter this field if you entered an Order Number. The list for this field only displays Ship Sets that exist on the order you specified.

10. Select the **Prior Reservations Only** box to release only those reservable items with existing reservations.

    Turn this option off to release orders regardless of their current reservations status.

11. Select the Item you want to release.

12. Select a Customer for the orders you want to release.

    You must enter a customer name in the Customer field if you want to enter a Ship-To location.

13. Indicate what type of delivery lines you want to release. Choose from the following options from the Orders field:

    Unreleased—Releases all unreleased delivery lines that meet your criteria.

    All—Releases backordered delivery lines and unreleased delivery lines that meet your criteria.

    Backordered—Releases only backordered delivery lines that meet your criteria.

14. Enter the starting and ending dates for the range of Scheduled Ship Dates you want to release. The ending date defaults to the current date.

    If you enter starting and ending schedule dates, Shipping Execution only releases order lines whose schedule dates are on or between these dates.

15. Enter the starting and ending dates for the range of Requested Dates you want to release. The ending date defaults to the current date.

    If you enter starting and ending requested dates, Shipping Execution only releases order lines whose requested dates are on or between these dates.

In the Shipping Tab:

16. Select the Trip containing the delivery lines you want to release.

17. Select the Delivery containing the delivery lines you want to release.

18. Select the freight carrier for delivery lines you want to release.

19. Select the shipment priority of the order lines you want to release.

If you leave this field blank, Shipping Execution releases orders regardless of their shipment priority.

20. Select a Release Sequence Rule to specify the order in which the picking lines are released. See: Defining Release Sequence Rules.

    You can select a Release Sequence Rule on the Shipping Parameters window to specify a default value for this field. See: Defining Shipping Parameters.

21. Select Yes from the **Autocreate Deliveries** box to automatically create deliveries for delivery lines once they are released.

    Note: This check box is only available if the Trip and Delivery fields are left blank. Autocreate Deliveries only applies to delivery lines that have not been assigned to a trip or a delivery.

22. Select the **Include Assigned Lines** box to release delivery lines that are assigned to deliveries or trips that have the defined picking criteria. This check box can only be checked when a trip or delivery has not been selected.

    For example, if you release an order consisting of unassigned and assigned delivery lines and this check box is selected, all of the delivery lines are released. If this check box is not selected, only the unassigned delivery lines will be released.

In the Inventory Tab:

23. Enter a subinventory.
24. If you enter a subinventory, only order line details with a matching subinventory are selected. If an order line detail does not have a subinventory specified, it is not selected.
25. Select a Pick Slip Grouping Rule to determine how released picking lines are grouped onto pick slips. See: Defining Pick Slip Grouping Rules.

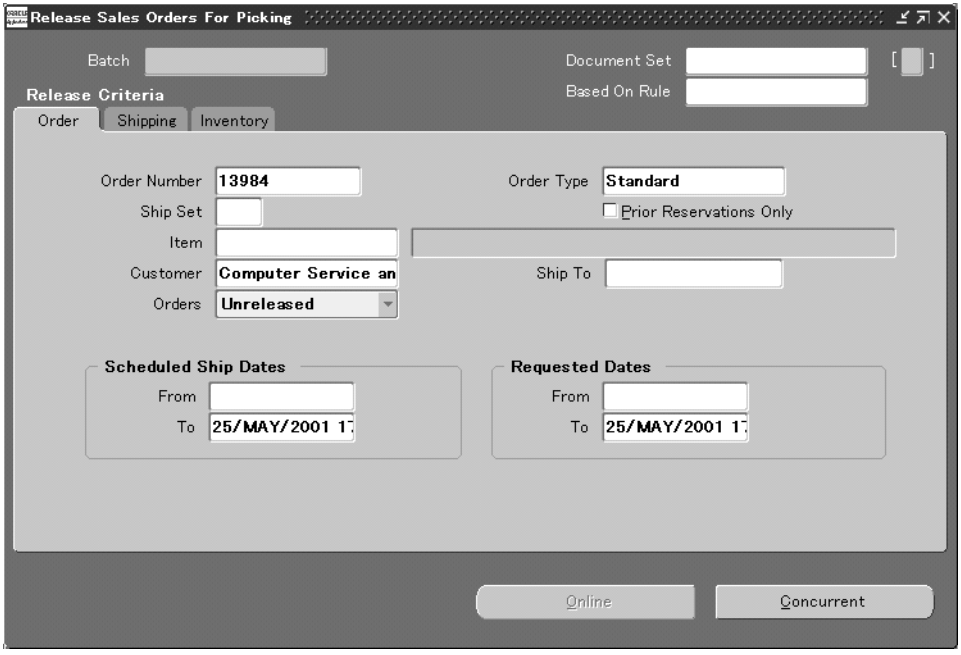
    You can select a Pick Slip Grouping Rule on the Shipping Parameters window to specify a default value for this field. See: Defining Shipping Parameters.
26. Select Auto Detail: Yes to have the lines automatically detailed and reserved.

    Note: If this option is not chosen, you must detail the lines and create reservations by using the Inventory Transact Move Orders window.
27. Select Auto Detail and Auto Pick Confirm to automate the detailing and reservation process.

    Note: If Auto Detail is not chosen, it is not possible to Auto Pick Confirm.
28. Select the Default Stage Subinventory and Locator if necessary.
29. Choose the Concurrent button.

◗ To release a sales order on-line:

1. Navigate to the Release Sales Orders for Picking window.



Note: Select Run Pick Release from the Tools menu to run the Pick Release Program within the Transactions Form without navigating to the Release Sales Order window.

2. Select an Order Number and/or a Trip, Trip Stop (and a delivery) and define any remaining fields on the window to further specify release criteria.

Note: You must select an Order Number to release a sales order on-line. You must select a Trip, Trip Stop (and, optionally, a delivery) to release a Trip, Trip Stop (and a delivery) on-line.

3. Click the On-line tab.

Order Cancellations

With the new material picking process, a sales order can now be canceled after it has been pick released without requiring the user to backorder in Oracle Shipping Execution. If an order quantity is reduced after pick released, any requested and detailed quantities on the Move Order line are reduced accordingly and any Reservations that exist for the sales order will be updated to reflect the new order quantity. These changes are made automatically and require no intervention from the user.

8

Standard Reports and Documents

Overview of Standard Reports and Documents

Shipping Execution provides you with a variety of flexible and easy-to-use reports to help you improve productivity and increase control.

Shipping-related reports include the following:

- Backorder Detail Report
- Backorder Summary Report
- Bill of Lading
- Commerical Invoice Report
- Mailing Label
- Packing Slip Report
- Pick Slip Report
- Vehicle Load Sheet Details
- Vehicle Load Sheet Summary

Backorder Detail Report

The Backorder Detail Report reviews all customer orders that have been backordered. This report provides details for each order including customer name, order number, order type of each order, all backordered items and their appropriate line numbers, total quantity both ordered and backordered, and monetary amounts of both ordered and backordered quantities.

Submission

In the Shipping Reports and Documents window, select Backorder Detail Report in the Name field.

Parameters

When you request a Backorder Detail Report, Shipping Execution provides you with the following parameters. If you leave any of the non-required parameters blank, this report includes all orders that meet your other parameter criteria.

- *Item:* Enter the number for the backordered item.
- *Item Category Set:* Select the item category set you want printed in this report. If you make a selection for this parameter, you can alsect a specific item category.
- *Item Category:* Select the item category you want printed in this report.
- *Transaction Type:* Select the transaction type that you want printed.
- *Order Number (Low/High):* Select the range of order numbers you want printed in this report.
- *Move Order Number (Low/High):* Select the range of move order numbers you want printed in this report.
- *Item Display:* Select Description, Flexfield, or Both depending on whether you want the item name, description, or both the item name and description to be printed in this report.
- *Item Flex Code:* Enter the name of the item flex code for the item.
- *Warehouse:* Select the warehouse where the item is backordered.

Backorder Summary Report

The Backorder Summary Report lists all unshipped orders. This report includes only open orders in an order cycle that includes Pick Release. It displays order information such as order number, customer name and number, order type, purchase order, order date, last shipped date, and the monetary amounts ordered, shipped and outstanding. This report also includes total amounts for customers and currencies. These amounts involve totals for shippable items only because the Backorder Summary Report does not account for non-shippable items.

Submission

In the Shipping Reports and Documents window, select Backorder Summary Report in the Name field.

Parameters

When you request a Backorder Summary Report, Shipping Execution provides you with the following parameters. If you leave any parameters blank, this report includes all unshipped orders that meet your other parameter criteria.

- *Transaction Type:* Select the transaction type that you want printed.
- *Order Number (Low/High):* Select the order number(s) that you want printed in this report.
- *Order Date (Low/High):* Select the dates requested for the orders.
- *Move Order Number (Low/High):* Select the range of move order numbers you want printed in this report.
- *Warehouse:* Select the warehouse for which you want the report printed.
- *Item Display:* Select Description, Flexfield, or Both depending on whether you want the item name, description, or both the item name and description to be printed in this report.
- *Item Flex Code:* Enter the name of the item flex code for the item.

Bill of Lading

The Bill of Lading prints (on preprinted forms) all sales orders that have been confirmed from a selected delivery. This document lists the ship date, carrier, bill of lading number, delivery name, shipper, ship-to address, carrier name, waybill number, quantity and description of unpacked items, quantity and total of items packed in containers, total quantity of items, and total weight of all items. Any shipping notes you may have created are also printed.

Submission

In the Shipping Reports and Documents window, select Bill of Lading in the Name field.

Parameters

When you request a Bill of Lading, Shipping Executon provides you with the following parameters. If you leave any of the non-required parameters blank, this document includes all picking lines that meet your other parameter criteria.

- *Initial Ship From Date (Low and High):* Enter the range of initial ship from dates you want in the shipping report**.**
- *Freight Carrier:* Select the freight carrier you want printed in this shipping report.
- *Delivery Name:* Select the delivery you want printed in this shipping report.
- *Trip Name:* Select the trip you want printed in this shipping report.
- *Bill of Lading Number:* Select the Bill of Lading Number you want printed in this shipping report.
- *Item Display:* Select Description, Flexfield, or Both depending on whether you want the item name, description, or both the item name and description to be printed in this report under the Item column heading.
- *Warehouse:* Select the warehouse for which you want the report printed.

Commercial Invoice Report

The Commercial Invoice Report lists all confirmed shipped items in a delivery. If you specify only a delivery name when defining the parameters of this report, Shipping Execution prints one commercial invoice per delivery within the trip.

This report lists ship date, commercial invoice ID (same as the delivery name), shipper / exporter, ship-to address, exporter identification number, freight carrier, country of origin, all confirmed items within each delivery (including purchase order number, order number, quantity, unit of measure, unit value, and extended value for the items), total packages, total weight, and total value.

You can print order and line level notes on the commercial invoice. However, Shipping Execution maintains a two line maximum for notes at the header or footer to allow space for the fixed footer information that prints at the bottom of this report.

Submission

In the Shipping Reports and Documents window, select Commercial Invoice in the Name field.

Parameters

When you request a Commercial Invoice, Shipping Execution provides you with the following parameters. If you leave any of the non-required parameters blank, this document includes all picking lines that meet your other parameter criteria.

- *Stop:* Select the trip stop code.
- *Initial Ship From Date (Low and High):* Enter the range of initial ship from dates containing the trip(s) and / or delivery(s) you want printed in this document. If you do not enter a value for this parameter, it is the equivalent of choosing all.
- *Freight Carrier:* Select the freight carrier you want printed in this report.
- *Delivery Name:* Select the delivery.
- *Item Display:* Select Description, Flexfield, or Both depending on whether you want the item name, description, or both the item name and description to be printed in this report.
- *Currency Code:* Select the currency code for the document.
- *Print Customer Item Information:* Select if you want customer item information included in the document.

Mailing Label Report

The Mailing Label Report consists of labels that print at document generation for identifying the ship-to address of the shipment. You will be able to print mailing labels before Ship Confirm since containers can be created without having to be associated to a Delivery. If any delivery and / or trip information is available, it will also appear on the mailing label including customer name, ship to address, carrier name, waybill number, and number of packages in the shipment.

Submission

In the Shipping Reports and Documents window, select Mailing Label in the Name field.

Parameters

When you request a Mailing Label, Shipping Execution provides you with the following parameters. If you leave any of the non-required parameters blank, this report includes all customer addresses that meet your other parameter criteria.

- *Stop:* Select the trip stop for which you want labels printed.
- *Initial Ship From Date (Low and High):* Enter the range of trip(s) and / or delivery(s) dates containing the delivery / deliveries for which you want labels printed.
- *Delivery Name:* Select the delivery name for which you want labels printed.
- *LPN:* Select the LPN for which you want labels printed.

Global Packing Slip Report

The Packing Slip Report is a shipping document that lists all the goods that are transported between two points. The transport of goods can be related to sales, outside processing, drop-shipments, consigned inventory, returns to suppliers, internal movements and shows that the goods do not belong to the carrier. In many countries, the packing slip is a common business practice, while in others, it is a mandatory business requirement to issue a shipping document for any shipment that leaves a company to a destination.

The Packing Slip Report prints the following information: the customer's name with both the ship-to and bill-to addresses, ship date, freight and payment terms, order date, and salesperson. Also included are the waybill number, freight type, freight amount, FOB point, freight carrier, and unit of measure.

The Packing Slip lists each ordered item including the line level ship-to contact or order level contact, the purchase order number, the unit of measure, and the quantities ordered, shipped, stockkeeping unit (SKU) of items shipped, and backordered. Among the options when generating a Packing Slip Report the user can cancel, edit, re-print, sort, and sequence Packing Slips.

For internal sales orders, Shipping Execution defaults the internal sales order number and requestor name to the Packing Instructions column.

Note: The Packing Slip Report meets EMEA requirements.

Submission

In the Shipping Reports and Documents window, select Packing Slip Report in the Name field.

Parameters

When you request a Packing Slip Report, Shipping Execution provides you with the following parameters. If you leave any of the non-required parameters blank, this report includes all picking lines that meet your other parameter criteria.

- *Delivery Name:* Select the delivery name for which you want printed.
- *Print Customer Item:* Select if you want to print the customer item.
- *Item Display Option:* Select Description, Flexfield, or Both depending on whether you want the item name, description, or both the item name and description to be printed in this report under the Item column heading.

- *Print mode:* Select if you want to print a draft or final version of the Packing Slip Report.
- *Print All Option:* Select if you want to print a consolidated packing slip report or one for each container.
- *Sort by:* You can sort by Customer Item Number or Inventory Item Number.
- *Inistial Ship From (From and To):* Enter the range of dates containing the trip(s) / delivery(s) to be included in your report.
- *Freight Carrier:* Select the freight carrier for the report you want printed.

Pick Slip Report

The Pick Slip Report prints all picking line details in a picking batch. The pick slip is used in conjunction with Pick Slip Grouping Rules and Pick Release to print consolidated pick slip reports. During Pick Release, Pick Slip Grouping Rules determine how released material is grouped into pick slips. This report is used by the picker in the warehouse to collect all items included in shipments.

The pick slip that is created can be broken down into four sections:

- *General header information:* Lists report date, warehouse, pick slip number, picking batch, and release date.
- *Release criteria:* Lists Pick Slip Grouping Rule name and its criteria used in grouping the pick slip such as the order number, subinventory, customer, ship-to location, carrier, delivery name, and shipment priority

> **Attention:** Subinventory, Customer, Ship-To, Carrier, and Shipment Priority will only display on the pick slip if they are defined in the Pick Slip Grouping Rules you selected during Pick Release. For example, the Customer name and Carrier displays on the pick slip if a Pick Slip Grouping Rule containing the customer name and freight carrier is selected during Pick Release.

- *Move Order Information (Picking data):* Lists delivery name, order number, primary subinventory, primary location, requested and shipped quantity, item name, ship set number, unit of measure, lot, whether or not the item is required for shipment, line id, trip name, shipment priority, from subinventory, from locator, to subinventory, to locator, and picking line details.
- *Shipping notes:* Lists any associated shipping notes.

> **Attention:** The shipped quantity is always zero unless you release a portion of the trip / delivery, run Ship Confirm, and then run Pick Release again (thus creating a new pick slip) on the remaining portion.

The Pick Slip lists each item as well as the line number, unit of measure, quantity requested, and whether the item is required for shipment. This report also lists each sales order, including customer name, shipping address, order number and order date, purchase order number, freight and payment terms, and salesperson

associated with the items. Also included are the pick slip number, FOB point, planned freight carrier, requisition number, requestor, and any shipping notes that are associated with the order.

Submission

Once you have run pick release, go to the View menu and select Requests to display the Find Requests window. Choose the Find button to find the requests. The requests are displayed in the Requests window. Select your request and choose the View Output button to view your pick slip.

Note: A printer must be assigned to the Pick Slip Report Document. This is set-up in the Choose Printers for Shipping Documents window.

Vehicle Load Sheet Details Report

The Vehicle Load Details report prints the loading sequence of items within a delivery. This report prints the following header information: organization from which the report is running, date the report is created, location from which the items are shipped, and name of the report. This report prints the following information for the delivery: trip and stop information for the delivery, initial ship from date, customer name, delivery name, loading sequence number for the delivery, gross weight and tare weight of the delivery, method used for loading the delivery, waybill number, customer production line to which the delivery is to be shipped, customer receiving dock, intermediate ship-to location, and final ship-to destination. This report also prints the following delivery line information for the delivery: master or detail container name, loading sequence, production sequence, customer sequence number, customer job number, item number, and item description.

Submission

In the Shipping Reports and Documents window, select Vehicle Load Sheet Details in the Name field.

Parameters

When you request a Vehicle Load Sheet Details Report, Shipping Execution provides you with the following parameters.

- *Trip:* Select the trip you want printed in this report.

See Also

Overview of Ship Confirm

Vehicle Load Sheet Summary

The Vehicle Load Sheet Summary Report prints a list of all deliveries assigned to a specific trip. This report prints the following header information: organization from which the report is running, date the report is created, location from which the items are shipped, and name of the report.

This report contains the following trip information: trip date, initial ship from date, whether the trip follows another trip, freight carrier, vehicle type, gross weight and net weight of the trip, and vehicle number.

The report contains the following delivery information within the trip: order in which the deliveries are to be loaded in the trip (load sequence), delivery name, gross weight and net weight of each delivery, waybill number, and customer name.

Submission

In the Shipping Reports and Documents window, select Vehicle Load Sheet Summary in the Name field.

Parameters

When you request a Vehicle Load Sheet Summary, Shipping Execution provides you with the following parameters.

- *Trip:* Select the trip you want printed in this document.

A

Flexfields

Overview of Flexfields

Depending on your system's setup, Shipping Execution may use some or all of the following flexfields. For country-specific information, please see the appropriate country-specific user's guide.

Key Flexfields

Accounting (Oracle General Ledger)

Defining your Accounting key flexfield is part of setting up your sets of books. See: Designing Your Accounting Flexfield, *Oracle General Ledger User's Guide*.

Stock Locators (Oracle Inventory)

If you want to track items by a specific aisle or row, use this key flexfield to capture additional information about inventory stock locators. See: Oracle Inventory Flexfields, *Oracle Inventory User's Guide*.

System Items (Oracle Inventory)

Before you define items, set up this flexfield in order to record and report item information. See: Oracle Inventory Flexfields, *Oracle Inventory User's Guide* and Oracle Order Management Profile Options.

Descriptive Flexfields

Additional Trip Information (WSH_TRIPS)

This descriptive flexfield displays additional trip information.

Additional Stop Information (WSH_TRIP_STOPS)

This descriptive flexfield displays additional stop information.

Additional Automotive Trading Partner Trip Stop Information (WSH_VEA_TRIP_STOPS)

This descriptive flexfield displays additional automotive trading partner trip stop information.

Additional Delivery Information (WSH_NEW_DELIVERIES)

This descriptive flexfield displays additional delivery information.

Additional Automotive Trading Partner Delivery Information (WSH_VEA_NEW_DELIVERIES)

This descriptive flexfield displays additional automotive trading partner delivery information.

Additional Globalization Delivery Information (WSH_NEW_DELIVERIES)

This descriptive flexfield displays additional globalization delivery information.

Additional Delivery Detail Information (WSH_DELIVERY_DETAILS)

This descriptive flexfield displays additional delivery detail information.

Additional Automotive Trading Partner Delivery Detail Information (WSH_VEA_DELIVERY_DETAILS)

This descriptive flexfield displays automotive trading partner delivery detail information.

Additional Picking Batch Information (WSH_PICKING_BATCHES)

This descriptive flexfield displays additional picking batch information.

Additional Picking Rule Information (WSH_PICKING_RULES)

This descriptive flexfield displays additional picking rule information.

Additional Pick Grouping Rule Information (WSH_PICK_GROUPING_RULES)

This descriptive flexfield displays additional pick grouping rule information.

Additional Pick Sequence Rule Information (WSH_PICK_SEQUENCE_RULES)

This descriptive flexfield displays additional pick sequence rule information.

Additional Container Item Information (WSH_CONTAINER_ITEMS)

This descriptive flexfield displays additional container item information.

Additional Shipping Parameter Information (WSH_SHIPPING_PARAMETERS)

This descriptive flexfield displays additional shipping parameter information.

Additional Exception Definition Information (WSH_EXCEPTION_DEFINITIONS)

This descriptive flexfield displays additional exception definition information.

Additional Exception Information (WSH_EXCEPTIONS)

This descriptive flexfield displays additional exception information.

Additional Document Instance Information (WSH_DOCUMENT_INSTANCES)

This descriptive flexfield displays additional document instance information.

Additional Document Category Information (WSH_DOC_SEQUENCE_CATEGORIES)

This descriptive flexfield displays additional document category information.

Additional Calendar Assignment Information (WSH_CALENDAR_ASSIGNMENTS)

This descriptive flexfield displays additional calendar assignment information.

Additional Carrier Ship Method Information (WSH_CARRIER_SHIP_METHODS)

This descriptive flexfield displays additional carrier ship method information.

Additional Freight Cost Information (WSH_FREIGHT_COSTS)

This descriptive flexfield displays additional freight cost information.

B

Windows and Navigator Paths

Shipping Execution Windows and Navigator Paths

For windows described in other manuals:

See...	Refer to this manual for a complete window description:
BOM	*Oracle Bills of Material User's Guide*
Flex	*Oracle Applications Flexfields Guide*
GL	*Oracle General Ledger User's Guide*
INV	*Oracle Inventory User's Guide*
SYS	*Oracle System Administrator's Guide*
User	*Oracle Applications User's Guide*
WSH	*Oracle Shipping Execution User's Guide*

Note: Text in brackets ([ ]) indicates a button.

Window Name	Navigation Path
Account Generator Processes	Shipping > Setup > Flexfields > Key > Accounts
Assign Calendars	Shipping > Setup > Calendars > Assign
Assign Security Rules	Shipping > Setup > Flexfields > Descriptive > Security > Assign > Find Descriptive Flexfield Segment [Find]
Calendar (See: Assign Calendar and Workday Calendar.)	
Carrier-Ship Method Relationships	Shipping > Setup > Freight > Define Carrier Ship Methods
Choose Printers for Shipping Documents	Shipping > Setup > Documents > Choose Printers
Container-Item Relationships	Shipping > Setup > Container Load Details > Organizations > [OK]
Create Containers	Shipping > Transactions >[Data Entry] >[Container Data Entry]
Cross-Validation Rules	Shipping > Setup > Flexfields > Key > Rules
Define Security Rules	Shipping > Setup > Flexfields > Validation > Security > Define > Find Value Set [Find]
Define Shipping Exceptions	Shipping > Setup > Define Exceptions
Delivery	Shipping > Shipping > [Data Entry] > [Delivery Data Entry]
Descriptive Flexfield Segments	Shipping > Setup > Flexfields > Descriptive > Segments
Document Categories-Summary	Shipping > Setup > Documents > Document Categories
Document Sequences	Shipping > Setup > Documents > Document Sequences
Find Key Flexfield Segment	Shipping > Setup > Flexfields > Key > Values
Find Personal Profile Values (See **SYS**)	Shipping > Setup > Profiles
Flexfield Qualifiers (See **Flex**)	Shipping > Setup > Flexfields
Freight Carriers	Shipping > Setup > Freight > Define Freight Carriers
Freight Costs	Shipping > Transactions > [Actions]
Freight Cost Types	Shipping > Setup > Freight > Define Freight Cost Types
Interfaces. See Shipping Interfaces.	
Oracle Shipping Lookups	Shipping > Setup > Lookups
Organization Parameters (See **INV**)	Shipping > Setup > Organization Parameters

Window Name	Navigation Path
Packing Workbench	Shipping > Transactions > Container > [Actions]
Personal Profile Values (See **SYS**)	Shipping > Setup > Profiles > Find Personal Profile Values [Find]
Pick Release	Shipping > Release Sales Orders > Release Sales Orders SRS
Pick Slip Grouping Rules	Shipping > Setup > Picking > Define Pick Slip Grouping Rules
Query Manager	Shipping > Transactions > [Flashlight icon]
QuickCodes (ITEM_TYPE) (See **INV**)	Setup > QuickCodes
Release Rules	Shipping > Setup > Picking > Define Release Rules Form
Release Sales Orders For Picking	Shipping > Release Sales Orders > Release Sales Orders
Release Sequence Rules	Shipping > Setup > Picking > Define Release Sequence Rules
Requests (See **User**)	Shipping > Requests > Find Requests [Find]
Rollup Groups	Shipping > Setup > Flexfields > Key > Groups> Find Key Flexfield Segment [Find]
Segment Values	Shipping > Setup > Flexfields > Validation > Values > Find Value Set [Find]
Sequence Assignments	Shipping > Setup > Documents > Assign Sequences
Shipping Document Sets	Shipping > Setup > Documents > Document Sets
Shipping Interfaces	Shipping > Interfaces > Run > Submit a New Request > [OK]
Shipping Parameters	Shipping > Setup > Shipping Parameters
Shipping Reports and Documents	Shipping > Reports and Documents > Submit a New Request > [OK]
Shipping Transactions	Shipping > Transactions
Shorthand Aliases (See **Flex**)	Shipping > Setup > Flexfields > Key > Aliases
Submit Request	Shipping > Reports and Documents > Submit a New Request > [OK]
Trip	Shipping > Transactions > [Detail]
Value Sets	Shipping > Setup > Flexfields >Validation > Sets
View Exceptions	Shipping > Exceptions
Workday Calendar (See **BOM**)	Shipping > Setup > Calendars > Enter

Glossary

A

arrival set

A set of line shipments that are expected to arrive at the same time to an ultimate location, but possibly from different sourcing organizations.

assigned lines

A line which is assigned to a delivery.

B

backorder

An unfulfilled customer order or commitment. Oracle Order Management allows you to create backorders automatically or manually from released order lines. *See* **Pick Release.**

backordered lines

Unfulfilled order line details which have failed to be released at least once by Pick Release or have been backordered by Ship Confirm.

bill of lading

A carrier's contract and receipt of goods transported from one location to another.

C

carrier

See **freight carrier**.

carriers code (SCAC)

The Standard Carrier Alpha Code is required on carrier supplied bills of lading.

consignee name

Show the exact name of the receiver of the goods, whether an individual person, party, firm or corporation. Note: When tendering a Collect on Delivery (COD) shipment, the letters C.O.D. must be inserted before the name of the consignee.

container

The receptacle (box, tank, etc.) in which items to be shipped are placed.

D

delivering carrier

This information should be supplied where shipments may be interlined with other carriers.

delivery

A set of order lines to be shipped to a customer's ship-to location on a given date in a given vehicle. Multiple deliveries can be grouped into a single trip. A single delivery may include items from different sales orders and may include backorders as well as regular orders.

delivery detail

Contains items to be shipped out of a warehouse. This may be a sales order line, an RMA line, a WIP line or a PO line. They can be referred to as deliverables.

delivery leg

A single segment of a delivery. Every delivery consists of at least two legs, when the delivery is picked up and dropped off, but may travel through several intermediate legs.

delivery line

A shippable and booked line from the planning pool which has been allocated to a delivery. After allocation, the line is no longer available in the planning pool. After the delivery is closed, the delivery line will also be considered closed.

F

flexfield segment

One of the parts of your key flexfield, separated from the other parts by a symbol you choose (such as -, /, or \). Each segment typically represents a cost center, company, item family, or color code.

FOB

See **freight on board**.

freight on board (FOB)

The point or location where the ownership title of goods is transferred from the seller to the buyer.

freight carrier

A commercial company used to send item shipments from one address to another.

freight charges

A shipment-related charge added during ship confirmation and billed to your customer.

freight terms

An agreement indicating who pays the freight costs of an order and when they are to be paid. Freight terms do not affect accounting freight charges.

G

gross weight

The weight of the fully loaded vehicle, container, or item, including packed items and packaging material.

I

intermediate ship-to

The delivery point for a shipment prior to an ultimate destination.

N

name of carrier

It is important that the name of the carrier issuing the bill of lading be shown in this space to identify the second party to the bill of lading provisions. It also identifies the carrier who becomes responsible for the shipment and assumes responsibility.

net weight

Weight of the contained load. Commonly calculated as GROSS - TARE, this includes the weight of any packing materials (paper, cardboard separators, Styrofoam peanuts, etc.).

P

pack slip

An external shipping document that accompanies a shipment itemizing in detail the contents of that shipment.

packing instructions

Notes that print on the pack slip. These instructions are for external shipping personnel. For example, you might wish to warn your carriers of a fragile shipment or your customer's receiving hours.

planned lines

Scheduled delivery lines that have been planned for a specific trip.

profile option

A set of changeable options that affect the way your applications run. In general, profile options can be set at one or more of the following levels: site, application, responsibility, and user.

R

release criteria

The criteria specified in the Pick Release window which defines which eligible order lines to pick release.

S

ship confirm

A process in Shipping Execution which allows you to identify shipped quantities, assign inventory control information for released lines, assign freight charges, and specify whether or not to backorder unfulfilled quantities of released line items.

ship confirmation

To enter shipped quantity and inventory controls for specific shippable lines. You can ship confirm the same delivery / trip repeatedly until you close the delivery / trip. Once it is closed, no more changes can be made into a delivery / trip.

ship date

The date upon which a shippable item is shipped.

Ship Partial

An order attribute indicating whether you allow partial shipments of an order. If you enter Yes for the Ship Partial field on an order, individual order lines can be shipped as they are available and you can assign different ship to locations and other order line details to different shipments in an order line. *See* **Ship Together.**

ship set

A group of order lines, linked by a common number, for which you want the full quantity to ship all together.

ship-to address

A location where items are to be shipped.

ship-to location

The delivery point for consolidated shipments, gathered from multiple locations, that will be shipped to an intermediate and / or ultimate ship-to location.

Ship Together

An order attribute indicating that you *do not* allow partial shipments of the order. You can also specify a configuration as Ship Together by setting the *Ship Model Complete* item attribute for the model item to Yes. *See* **Ship Partial, ship together model.**

Ship Together model

A model item with the *Ship Model Complete* item attribute set to Yes. This indicates that the entire configuration must be delivered in the same shipment. If the item attribute is set to No, components can ship separately. ATO items and configurations are inherently Ship Together models. *See* **ship set.**

ship via

See **freight carrier.**

shipment

An individual package sent to a customer. Thus, a shipment might contain an entire order, if all items in that order are pick released and packed together. A shipment might contain just part of an order that is pick released and packed. A shipment might also contain only part of a released order line, where some of the items on the picking slip are not in stock.

shipment priority

A term that indicates the urgency with which an order should be shipped to the customer.

shipment schedule

An itemized list of when, how, where, and in what quantities to ship an order line.

shippable item

An item with the Shippable inventory item attribute set to Yes, indicating that this item will appear on pick slips and pack slips.

shippable lines

Picking line details that have been pick released and are now eligible for Ship Confirm.

shipper bill of lading number

A number that can be pre-assigned by a carrier in the cases where the shipper's system generates the bill of lading.

shippers name

The complete corporate name should be shown in this space. In the event the shipment is being made for someone other than the actual shipper, their name should also appear in this space.

shipping documents

Shipping related reports, such as the Bill of Lading, Commercial Invoice, Mailing Label, Pack Slip, Vehicle Load Sheet Summary, and Waybill.

stop

A point along the route a trip makes to its final destination. This point may also have some activity associated with it. The activity might include picking up a new delivery, dropping off a delivery or both. In Pick Release, stop is a release criteria for releasing items that have initial pick-up locations corresponding to the specified stop, or location.

T

tare weight

The weight of an item, excluding packaging or included items.

trailer number

This number is used to track full truckload shipments.

trip

An instance of a specific Freight Carrier departing from a particular location containing deliveries. The carrier may make other stops on its way from the starting point to its final destination. These stops may be for picking up or dropping off deliveries.

trip planning

The process of planning the necessary vehicles and grouping the scheduled shipments that will be included in a given trip. Planning the trip requires consideration of vehicle load capacities, container capacities and, in certain cases, the loading order for the customer's specified unload order.

trip stop

A location at which the trip is due for a pick-up or drop-off.

U

ultimate ship-to location

The final destination of a shipment.

unit of measure

The unit that the quantity of an item is expressed.

unit of measure class

A group of units of measure and their corresponding base unit of measure. The standard unit classes are Length, Weight, Volume, Area, Time, and Pack.

unreleased lines

Order line details that are unfulfilled by Pick Release.

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