

Oracle® Shipping Execution

User's Guide

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Oracle Shipping Execution User's Guide, Release 11i

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Oracle Shipping Execution User's Guide, Release 11i

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Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
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If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

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

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

- The principles and customary practices of your business area.
- Oracle Shipping Execution

If you have never used Oracle Shipping Execution, Oracle suggests you attend one or more of the Oracle Shipping Execution training classes available through Oracle University.

- The Oracle Applications graphical user interface.

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

- Chapter 1 provides an overview of Oracle Shipping Execution and the Shipping Transactions window--a centralized workbench for performing shipping transactions.

- Chapter 2 provides an overview of the Query Manager—a query management and search tool you can use to find trips, deliveries, containers, and delivery lines.
- Chapter 3 describes how to use the Shipping Transaction window to create trips, plan and unplan trips, view shipping information, and assign freight costs to trips.
- Chapter 4 describes how to view and update exceptions, log new shipping exceptions, and purge logged shipping exceptions.
- Chapter 5 describes how to create, manage, and pack deliveries.
- Chapter 6 describes how to manage delivery lines, assign and unassign delivery lines to a delivery, and auto-create deliveries and trips for delivery lines.
- Chapter 7 describes how to create containers (LPNs), assign and unassign containers to a delivery, and pack delivery lines into containers using the Packing Workbench.
- Chapter 8 describes how to pick release sales orders.
- Chapter 9 describes how to ship confirm deliveries and create trips at ship confirm.
- Chapter 10 describes United Parcel Service (UPS) integration with Shipping Execution including calculating shipment rates, selecting services, tracking lines and containers, and validating addresses.
- Chapter 11 provides you with information on standard reports and documents to help you improve productivity and increase control.
- The Appendices provide you with information about item attributes, flexfields that Oracle Shipping Execution uses, and navigation paths to all windows in Oracle Shipping Execution.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information,

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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.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **Online Help** - Online help patches are available on MetaLink.
- **11i Features Matrix** - This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on MetaLink.
- **Readme File** - Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

Related User's Guides

Oracle Shipping Execution shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user's 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>.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Shipping Execution (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

User Guides Related to This Product

Oracle Advanced Pricing User's Guide

If you need to bill customers for freight costs, you must establish pricing modifiers and formulas which this guide describes.

Oracle Bills of Material User's Guide

Use this guide to help you set up workday calendars to assign to shipper, receivers, and carriers.

Oracle Inventory User's Guide and Oracle Process Manufacturing Inventory Management User's Guide

Refer to this guide for information about the following topics:

- Creating organizations, sub inventories, and locators
- Setting organization parameters
- Creating units of measure (UOM) and UOM classes
- Setting picking rules
- Creating items and setting item attributes--shipping eligible, weight/volume, lot/locator/serial number control
- Manually allocating and reserving order lines
- Manually transacting move orders
- Executing the Inventory Interface con current process
- Viewing supply/demand information
- Setting up freight carriers
- Setting up container types

Oracle iStore User's Guide

See this guide for more information on web users use of ship methods.

Oracle General Ledger User's Guide

For more information on setting up accounts for freight carriers and cost of goods sold, see this guide.

Oracle Order Management User's Guide

This guide explains:

- Order lines and delivery lines
- Ship sets
- Cost of goods sold account
- Freight cost type lookups
- Passing freight costs
- Reservations
- OM Interface concurrent process
- Document categories, category assignments, document sequence rules, and text attachment positions

Oracle Project Contracts User's Guide

This guide provides information on creating contract deliverables for shipping.

Oracle Receivables User's Guide

This guide helps you to understand entry and processing of multiple currencies.

Oracle Release Management User's Guide

To use intermediate ship-to locations, refer to this guide.

Oracle Warehouse Management System User's Guide

This guide explains the following features and functions for shipping users of the Oracle Warehouse Management System:

- Printer levels
- Pick methodologies
- Grouping criteria
- Packing containers and assigning to deliveries

Oracle Transportation User's Guide

This guide helps you to understand the Oracle Transportation functionality.

Installation and System Administration

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 Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web 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 Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your

installation. You should use this guide in conjunction with individual product user's 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 and lists database and product-specific upgrade tasks. You must be either at 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.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

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 concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

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 for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

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.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference 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, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Shipping Execution. This manual details additional steps and setup considerations for implementing Oracle Shipping Execution with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Shipping Execution with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Shipping Execution.

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.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Shipping Execution implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes API's and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes API's and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Shipping Execution and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

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 Oracle8i server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

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 Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may 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 to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. 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, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing 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 applications products, along with related consulting, education, and support services, in over 145 countries around the world.

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

Oracle values your comments and feedback. At the end of this guide is a Reader's Comment Form you can use to explain what you like or dislike about Oracle Shipping Execution or this user's guide. Send your comments to the electronic mail address **mfgdoccomments_us@oracle.com** and indicate if you would like a reply.

1

Shipping

Topics covered in this chapter include the following:

- [Overview of Shipping](#) on page 1-2
- [Shipping Transactions Window](#) on page 1-3

Overview of Shipping

You can manage shipping information such as trips, trip stops, deliveries, delivery lines, containers, and freight costs in the Shipping Transactions window. In addition, you can complete the following shipping tasks:

Trip and Delivery Planning

- Create a trip or delivery.
- Assign delivery lines to a delivery or a container.
- Schedule pick-ups and drop-offs.
- Estimate the number of containers required for a shipment.

Pick Release

- Release eligible delivery lines based on defined picking criteria.
- Select the Release Sequence Rule to control the order in which picking lines are allocated to inventory.
- Assign freight costs (after pick release).
- Enter or validate shipped quantities, back ordered quantities, staged quantities, and inventory control information for delivery lines (after pick release).

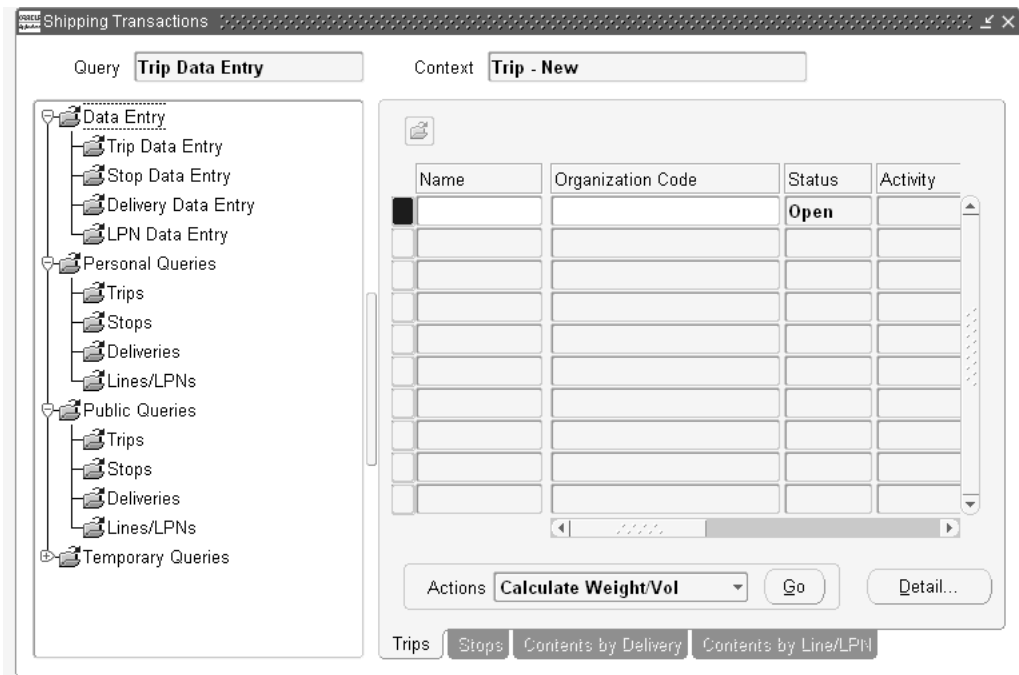
Ship Confirm

- Assign unplanned delivery lines to trips and deliveries.
- Auto-create a trip and close stops.
- Ship confirm or back order a delivery.

Shipping Transactions Window

The Shipping Transactions window provides a consolidated workbench for three major shipping functions: planning, pick releasing, and ship confirming. It enables you to plan and manage trips, stops, deliveries, delivery lines, and LPNs (containers).

Figure 1–1 Shipping Transactions Window



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

Query Manager: Enables you to perform customized searches called queries to find trips, stops, deliveries, delivery lines, and LPNs (containers). Using the Query Manager, you can manage personal queries, do searches using existing queries, and share queries with other authorized users.

Data Manager: Enables you to manage information about shipping entities, and complete the following tasks:

- plan trips, stops, deliveries, and delivery lines/containers
- confirm a shipment or delivery
- track shipments
- track shipping containers
- handle over and under shipments
- initiate Intrastate (European) transactions
- pick release trip, stop, delivery, delivery lines, and container
- run reports

Note: You can customize the fields displayed in the Shipping Transactions window by adding or hiding fields to suit your business requirements.

To show additional fields or hide existing fields, place the cursor in any column and select Folder (from the Tools menu) > Show Field to display additional fields or Folder > Hide Field to hide selected fields.

You can save the updated Shipping Transactions window layout and use it as the new default (or you can select the original default).

To save the Shipping Transactions window layout, select Folder > New to display the Create New Folder window. Complete your entries and choose the OK button to save the view as a folder. To open a saved folder, choose the Open Folder icon located in the Shipping Transactions window.

Note: The Shipping Transactions window includes the following process fields: Sublot, Grade, Secondary Requested Quantity, Secondary Picked Quantity, Secondary Shipped Quantity, Secondary Backordered Quantity, Secondary Stage Quantity, Secondary Delivered Quantity, Secondary Requested Quantity UOM, Secondary Cancelled Quantity, Secondary Source Requested Quantity, and Secondary Source Requested Quantity UOM.

To view these fields, choose Folder > Show Fields. Select the fields from the list of values. If the OPM item is dual UOM controlled, lot or subplot controlled, and has a grade, then you will see values in these fields. Otherwise, these fields will be blank. Refer to *Using Oracle Order Management with Process Inventory* for description of process fields.

See

[Query Manager](#) on page 2-2

Searching with Query Manager

Topics covered in this chapter include the following:

- [Query Manager](#) on page 2-2
- [Creating a Query](#) on page 2-3
- [Finding Trips](#) on page 2-5
- [Finding Stops](#) on page 2-7
- [Finding Deliveries](#) on page 2-9
- [Finding Delivery Lines and LPNs](#) on page 2-15
- [Finding Containers](#) on page 2-19
- [Finding Delivery Lines](#) on page 2-22

Query Manager

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

- [Trips](#)
- [Stops](#)
- [Deliveries](#)
- [Lines and LPNs \(containers\)](#)
- [LPNs](#)
- [Lines \(B\)](#)

You can create customized queries (searches) by entering your search criteria and saving the query. Once the query is saved, you can re-use it for future searches. For example, if you create a query named Airline Container to find airline containers of a certain dimension, you can use this query again to repeat the search rather than re-enter the search criteria.

Queries can be saved and shared with other authorized users as Public Queries. This is useful, for example, if you want to centrally manage the queries.

Queries are grouped into the following categories and display in the left pane of the Shipping Transactions window:

- **Personal Query:** Queries you save for your personal use.
- **Public Query:** Queries you save and share with other 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.

Creating a Query

If you frequently query the same item, you can save the query and re-use it again for future queries. For example, if you frequently query open deliveries to be shipped from a particular warehouse, you can create and save a query to find open deliveries. Once the query is saved, you can re-use it again for future queries.

To create a query:

1. Navigate to the [Query Manager](#) window.

Figure 2–1 Query Manager Window

The screenshot shows the Query Manager window with the following sections:

- Search for:**
 - Trips
 - Stops
 - Deliveries
 - Lines and LPNs
 - LPNs
 - Lines (B)
- Saved Query:**
 - Name:
 - Description:
 - Owner:
 - Share Query?
- Trips:**
 - Trip Names: -
 - Status:
 - Planned:
 - Ship Method:
- Vehicles:**
 - Organization:
 - Item Name:
 - Description:
 - Number Prefix:
 - Numbers: -

Buttons at the bottom: Open..., Save, Copy, Delete, Clear, Find...

2. In the Search For region, choose an entity to query such as Trips.
3. In the Saved Query region, enter a name and description for the query.
4. Optionally, to share a query with other users, enable the Share Query box.

Note: A Public Query displays in the Personal Queries folder if you are the query owner, but displays in the Public Queries folder for other authorized users.

You cannot edit a Public Query if you are not the owner. However, you can copy an existing query by selecting the Copy button, and rename.

5. Complete your search criteria in the Additional tabs.

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.

6. Click Save.
7. Click Find to start your search.

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.
3. The query results display in the Shipping Transactions window.

Finding Trips

You can find an existing trip using the Query Manager.

Prerequisites

A trip must be created.

To find a trip:

1. Navigate to the [Query Manager](#) window.

Figure 2–2 Query Manager - Trips Window

2. In the Search For region, choose Trips.
3. In the Trips tab, select one or more of the following criteria for your query:
 - Trip Names

- Trip Status and Planned status
 - Ship Method
 - Organization of the vehicle for the trip
 - Number Prefix
 - Numbers for the vehicle
4. When you have completed your entries, click Find to display the search results in the Shipping Transactions window.

Finding Stops

You can find an existing stop using the Query Manager.

Prerequisites

A stop must be created.

To find a stop:

1. Navigate to the [Query Manager](#) window.

Figure 2–3 Query Manager - Stops Window

2. In the Search For region, choose Stops.
3. In the Stops tab, select one or more of the following criteria for your query:
 - Stop Location.
 - Stop Status, Departure Fill, Seal Codes, if applicable.

- Trip range for the stop.
 - Range for the Arrival and Departure Dates for the stop.
4. When you have completed your entries, click Find to display the search results in the Shipping Transactions window.

Finding Deliveries

You can find an existing delivery using the Query Manager.

Prerequisites

A delivery must be created.

To find a delivery:

1. Navigate to the [Query Manager](#) window.

Figure 2–4 Query Manager - Deliveries Window

2. In the Search For region, choose Deliveries.
3. In the Deliveries tab, select one or more of the following criteria for your query:
 - Delivery Name
 - Bills of Lading

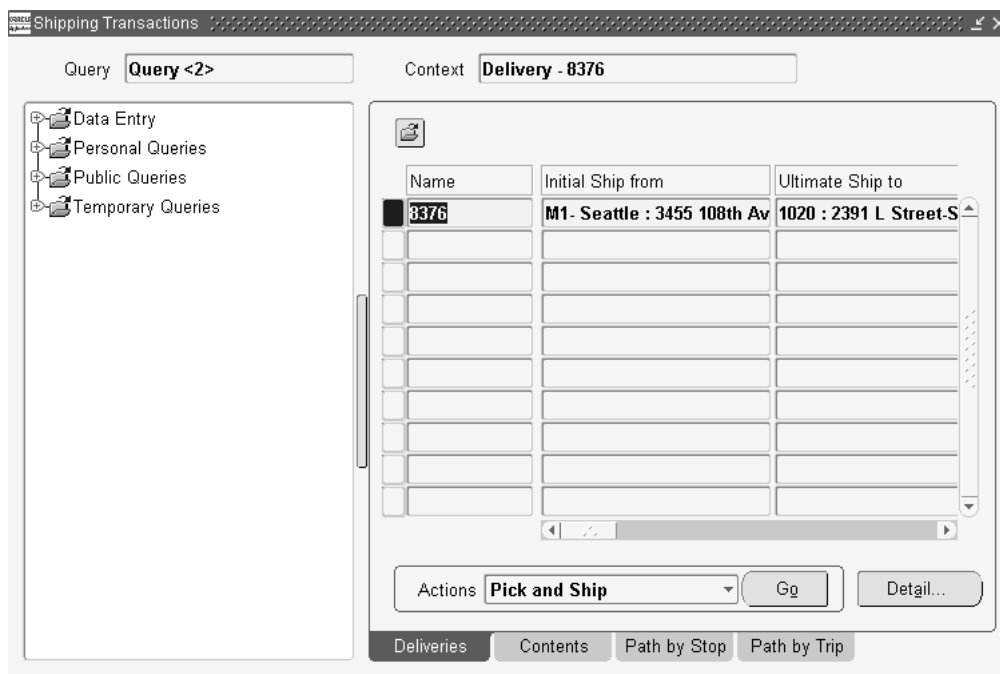
- Delivery Status: The choices include: Open, Confirmed, In-Transit, Closed, Outbound, Outbound Request, Outbound Cancel, and Inbound Received. The statuses Outbound, Outbound Request, Outbound Cancel, and Inbound Received are for use if you have Oracle Transportation installed.

Note: The following Delivery Status values search for deliveries with these statuses:

- Querying for Outbound finds Shipment Requested and Shipment Cancel Requested deliveries.
 - Querying for Outbound Request finds Shipment Requested deliveries.
 - Querying for Outbound Cancel finds Shipment Cancel Requested deliveries.
 - Querying for Inbound Received finds Shipment Advice Received deliveries.
-
-

- Assigned or Unassigned
 - Planned or Unplanned deliveries
 - Organization
 - Ship From, Ship To, Intermediate Ship To, and Pooled Ship To
 - Consignee, Ship Method, FOB, Freight Terms
 - Pick-up Dates, Drop-off Dates
4. When you have completed your entries, click Find to display the search results in the Shipping Transactions window.

Figure 2–5 Shipping Transactions Window - Deliveries Tab



5. Navigate to the Deliveries tab where you can view the following:
 - Name: Delivery name
 - Initial Ship from: The organization that the delivery shipped from
 - Ultimate Ship to: The final destination
 - Status: The status of the delivery
 - Organization Code
 - Freight Terms
 - FOB: FOB terms
 - Ship Method: The method that the delivery will be shipped
 - Carrier
 - Service Level: Service from the Carrier

- Mode of Transportation: How the delivery will be delivered, for example LTL or Air
 - Port of Loading: The port that the delivery will be loaded onto a ship
 - Port of Discharge: The port that the delivery will be unloaded from a ship
 - FTZ Number: (Foreign Trade Zone) number is an identification number typically assigned by Customs to identify the zone
 - Entry Number: Assigned to each importation into a customs territory
 - In Bond Code: Defines cargo moving under Customs control where duty has not yet been paid
 - Shipping Marks: used to identify the truck, railcar, export container, or other vehicle in which the delivery is transported
 - Problem Contact Reference: Contact name in case of a problem
 - Routing Instructions: A free form field to enter instructions on routing the delivery
 - COD Amount
 - COD Currency Code
 - COD Remit To
 - COD Paid By
6. Navigate to the Contents tab to view the following:
- Detail
 - LPN
 - Item Name
 - Delivery: Delivery number
 - Line Status
 - Order: Order number
 - Details Required
 - Requested Quantity
 - Shipped Quantity
 - Delivered Quantity

- Backordered Quantity
 - Serial Number
 - Serial Number High
 - Ship from
 - Ship to
 - Deliver to
 - Organization Code
 - Subinventory
7. Navigate to the Path by Stop tab to view the following:
- Location
 - Trip
 - Sequence
 - Status
 - Activity
 - Planned Arrival Date: Defaults from the initial_pickup_date of the delivery attached
 - Planned Departure Date: Defaults from the initial_pickup_date of the delivery attached
 - Actual Arrival Date: Defaults from the ultimate_dropoff_date of the delivery attached
 - Actual Departure Date: Defaults from the ultimate_dropoff_date of the delivery attached

Note: If the trip has a delivery assigned to it, enter a number to indicate the sequence of the stop in the trip relative to the other stops. For example, if you want a stop to occur between stop sequences 30 and 40, enter 35. You must make each stop sequence number unique within a trip. If a stop sequence number is updated and it causes a delivery to become out of sync with the trip, then you receive a warning indicating that the delivery will be unassigned from the trip. If you accept the warning, the specified delivery is unassigned from the trip.

Note: If you have Oracle Transportation installed, when you add a new trip stop or modify a stop location, Oracle Transportation validates that the trip matches the carrier service and schedule.

When you create or delete a stop or update trip or stop status or attributes, Oracle Transportation also updates its information.

You cannot modify the first or last stop if the Oracle Transportation trip is in transit. When you close the initial pickup location for a delivery, Oracle Transportation recalculates the freight rates for the delivery, validates the delivery leg sequence.

If you change the shipment configuration, Oracle Transportation marks all delivery legs for recalculation of freight rates.

8. Navigate to the Path by Trip tab to view the following:
 - Name
 - Organization Code
 - Status
 - Activity
 - Ship Method
 - Carrier
 - Service Level
 - Mode of Transport

Finding Delivery Lines and LPNs

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

Prerequisites

Lines and LPNs must be created

To find delivery lines and LPNs:

1. Navigate to the [Query Manager](#) window.

Figure 2–6 Query Manager - Lines and LPNs Window

The screenshot shows the 'Query Manager' window with the 'Lines/LPNs' tab selected. The window is divided into several sections:

- Search for:** A group box containing radio buttons for 'Trips', 'Stops', 'Deliveries', 'Lines and LPNs' (which is selected), 'LPNs', and 'Lines (E)'.
- Saved Query:** A group box with a checkbox 'Saved Query' and fields for 'Name', 'Description', and 'Owner' (set to '<None>'). There is also a checkbox 'Share Query?'.
- Criteria Fields:** A series of input fields for 'Organization', 'Consignee', 'Ship Method', 'Ship from', 'Ship to', and 'Dates Scheduled'.
- Lines Section:** A group box containing dropdown menus for 'Source System' (set to 'Order Management'), 'Status' (set to 'Not Shipped'), 'Assigned', and 'Packed'. It also has input fields for 'Order Numbers' and 'Order Type', and a text field for 'Item'.
- LPNs Section:** A group box containing dropdown menus for 'Assigned' and 'Packed', and input fields for 'Names' and 'Item'.

At the bottom of the window, there are buttons for 'Open...', 'Save', 'Copy', 'Delete', 'Clear', and 'Find...'.

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

3. In the Lines and LPNs tab, select one or more of the following criteria for your query:

- Organization
- Consignee
- Ship Method, Ship from, and Ship to dates

In the Lines section:

- Source System
- Status (of Lines/LPNs)
- Dates Scheduled
- Assigned, Packed, and Released fields (for delivery lines)
- Order numbers, Order Type
- Item

In the LPNs section:

- Assigned and Packed status (for LPNs)
- LPN Names
- Item

4. When you have completed your entries, click the Additional (1) tab.

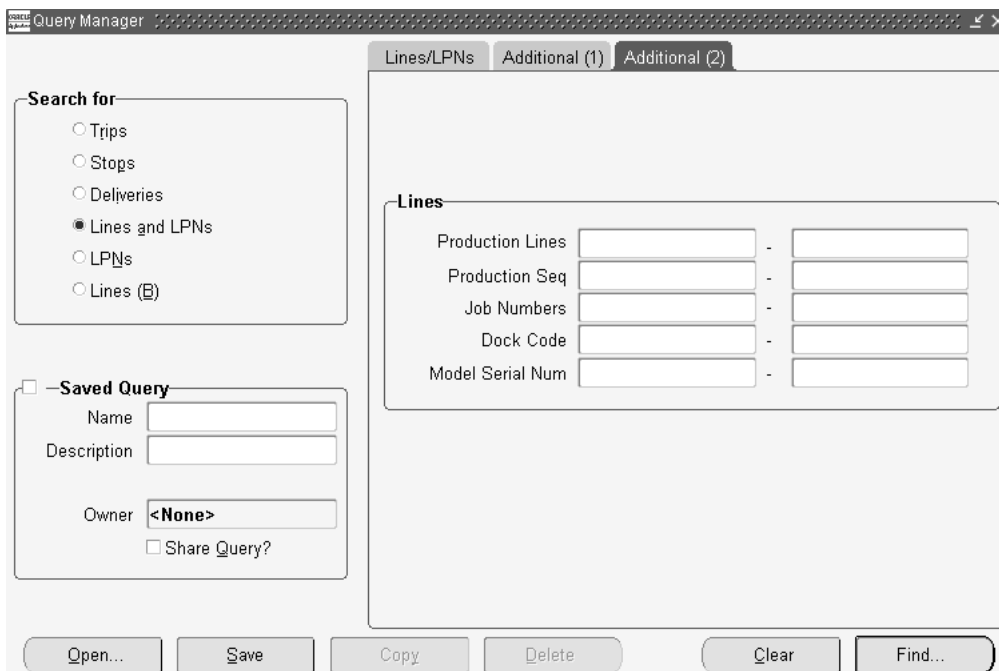
Figure 2–7 Query Manager - Lines and LPNs/Additional (1) Window

In the Additional (1) tab, you can select additional criteria for your query:

- Deliver to and Intermediate Ship to
- FOB, Freight Terms, and Shipment Priority
- Tracking Numbers and Dates Shipped
- Order Lines
- In the LPNs section, select the Fill status and choose either Use Shared Criteria, Include Immediate Contents, or Include Containers for Selected Orders Only.

5. When you have completed your entries, click the Additional (2) tab.

Figure 2–8 Query Manager - Lines and LPNs/Additional (2) Window



In the Additional (2) tab, you can select additional criteria for your query: Production Lines, Production Seq, Job Numbers, Dock Code, and Model Serial Num.

6. When you have completed your entries, click Find to display the search results in the Shipping Transactions window.

Finding Containers

You can find existing containers (LPNs) using the Query Manager.

Prerequisites

An container must be created.

To find containers:

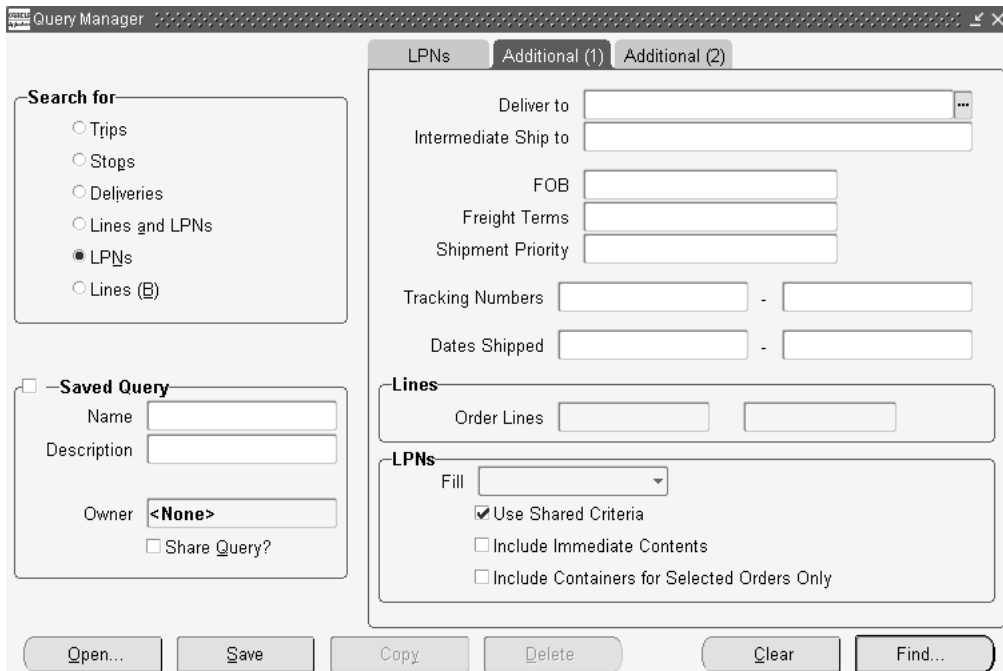
1. Navigate to the [Query Manager](#) window.

Figure 2–9 Query Manager - LPNs Window

2. In the Search For region, choose LPNs
3. In the LPNs tab, select one or more of the following criteria for your query:
 - Organization
 - Consignee

- Ship Method, Ship from and Ship to dates, and range of dates scheduled for delivery
 - In the LPNs section, select the Assigned and Packed status, the range of LPN Names.
4. When you have completed your entries, click the Additional tab.

Figure 2–10 Query Manager - LPNs/Additional (1) Window



In the Additional tab, you can select from the following additional criteria:

- Deliver to, and Intermediate Ship to
- FOB, Freight Terms, and Shipment Priority
- Tracking Numbers and Dates Shipped
- In the LPNs section, select the Fill status and choose Include Immediate Contents, if applicable. Use Shared Criteria and Include Containers for Selected Orders Only are disabled when querying LPNs.

Note: Additional(2) tab does not apply to your search for LPNs, since this tab is reserved for Line searching.

5. When you have completed your entries, click Find to display the search results 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.

Figure 2–11 Query Manager - Lines (B) Window

2. In the Search For region, choose Lines.
3. In the Lines tab, select one or more of the following criteria for your query:
 - Organization

- Consignee
 - Ship Method, Ship from and Ship to dates
 - Dates Scheduled for delivery
 - Source System
 - Status (of Lines)
 - Assigned, Packed, and Released status
 - Order Numbers, and Order Type
4. When you have completed your entries, click the Additional (1) tab.

Figure 2–12 Query Manager - Lines (B)/Additional (1) Window

In the Additional tab, you can select additional criteria for your query:

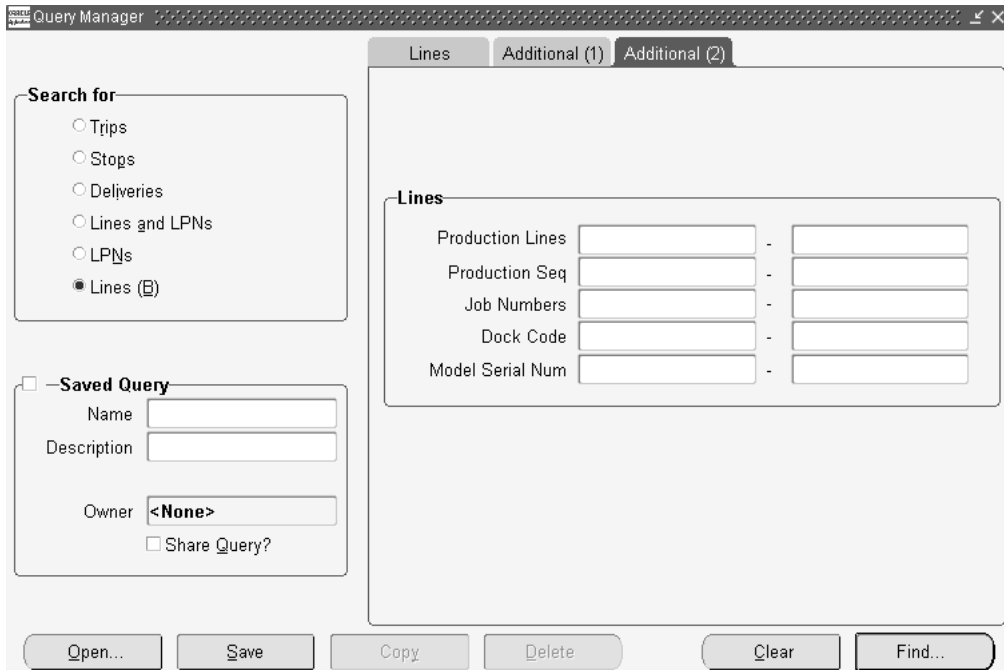
- Deliver to and Intermediate Ship to

- FOB, Freight Terms, and Shipment Priority
- Tracking Numbers and Dates Shipped
- In the Lines section, select Order Lines

Note: The LPNs region is disabled, since your query is for Delivery Lines.

5. When you have completed your entries, click the Additional (2) tab.

Figure 2–13 Query Manager - Lines (B)/Additional (2) Window



In the Additional (2) tab, you can select additional criteria for your query: Production Lines, Production Seq, Job Numbers, Dock Code, and Model Serial Num.

6. When you have completed your entries, click Find to display the search results in the Shipping Transactions window.

Trip Planning

Topics covered in this chapter include the following:

- [Overview of Trips](#) on page 3-2
- [Creating a Trip](#) on page 3-3
- [Planning a Trip](#) on page 3-8
- [Unplanning a Trip](#) on page 3-10
- [Assigning Freight Costs to a Trip](#) on page 3-11
- [Printing a Document Set for a Trip](#) on page 3-13
- [Calculating Weight and Volume for a Trip](#) on page 3-14
- [Ship Confirming at Trip](#) on page 3-15

Overview of Trips

A trip is an instance of a specific freight carrier departing from a particular location containing deliveries.

A trip is carrier specific and contains at least two stops such as a stop to pick up goods and another stop to drop off goods, and may include intermediate stops.

Trips can be created automatically or manually.

Note: If you utilize Oracle Transportation, compatibility constraints can be used in the shipping process up through ship confirmation.

Compatibility Constraints enable you to define a variety of transportation related restrictions related to items (goods for shipment), carriers, modes of transport, facilities, organizations, and customers. Then, these restrictions are used by the application to warn or prevent further order processing if the defined undesirable condition is encountered. For example, you can define an item-carrier compatibility constraint stating that designated carriers cannot transport specific inventory items. When a delivery is created violating the constraint, an error or warning message will be generated. You determine the severity of the constraint violation; whether a warning or error should display.

For more information, refer to the *Oracle Transportation User's Guide*.

You can perform the following tasks with trips:

- [Create a trip](#)
- [Plan a trip](#)
- [Unplan a trip](#)
- [Assign freight costs to a trip](#)
- [Print a document set for a trip](#)
- [Calculate weight and volume for a trip](#)
- [Ship confirm a trip](#)

Creating a Trip

There are several ways to create a trip:

Automatic

If your shipping process does not require advanced planning, you may prefer to automatically create trips:

- Auto-creating a trip for a delivery: You can find the delivery you want to ship, and auto-create a trip and related trip stops.
- Auto-creating a trip for containers and lines: You can find the lines and containers you want to ship and auto-create a trip which creates a trip, related deliveries, and trip stops.

Manual

During transportation planning, you can manually create a trip and later assign delivery lines or find the delivery lines and create a trip. For example, for a regular trip scheduled to depart every Friday, you can manually set up a trip ahead of time and then assign delivery lines.

When you manually create a trip, you can manually assign stops, deliveries, and delivery lines to that trip.

To auto-create a trip for a delivery:

1. Navigate to the [Query Manager](#) window, and find the delivery or group of deliveries.

See: [Finding Deliveries](#) on page 2-9.

Figure 3–1 Delivery Window

The screenshot shows the 'Delivery - 8376' window with the following data:

Name	8376	Status	Open
Organization	M1 Seattle Manufacturing	<input type="checkbox"/> Planned	Exceptions <input type="checkbox"/>
Initial Ship from	M1 - Seattle : 3455 108th Avenue	Ship from Date	07-FEB-2001 00:00:00
Ultimate Ship to	1020 : 2391 L Street-San Jose	Ship to Date	07-FEB-2001 00:00:00
Intermediate Ship to		Number of LPNs	
Pooled Ship to		Waybill	
Consignee	World of Business	Freight Terms	Prepay & Add
Ship Method	BEST-LTL-Standard	Carrier	Best LTL
Service Level	Standard	Mode of Transport	LTL
FOB	Destination	FOB Location	
Gross Weight		UOM	Lbs
Tare Weight			
Net Weight			
Volume		UOM	FT3
Actions: Pick and Ship		Go	
		Done	

The delivery(s) displays in the Shipping Transactions window.

2. If more than one delivery displays, select the deliveries.
3. From the Actions menu, select Auto-create Trip.
4. Click Go or press Return.

At least one trip and its related stops are created based on the deliveries Shipped From and Shipped To criteria.

You can view information about the trip by choosing the Detail button, the Path by Stop tab, or the Path by Trip tab.

5. Save your work.

To autocreate a trip for delivery lines and containers

1. Navigate to the [Query Manager](#) window, and find the 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. Click Go or press Return.
5. At least one trip, stops, and delivery(s) are created for the lines and containers.

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

6. Save your work.

To manually create a trip:

1. Navigate to the [Trip](#) window.

Figure 3–2 Trip Window

The screenshot shows the 'Trip - New' window with the following fields and controls:

- Name:** 71429
- Status:** Open
- Ship Method:** [Empty]
- Activity:** [Empty]
- Carrier:** [Empty]
- Service Level:** [Empty]
- Mode of Transport:** [Empty]
- Consolidate
- Planned
- Exceptions
- Vehicle Section:**
 - Organization:** [Empty]
 - Item Name:** [Empty]
 - Number Prefix:** [Empty]
 - Number:** [Empty]
- Arrive after Trip:** [Empty]
- Tender Status:** [Empty]
- Routing Instructions:** [Empty]
- Actions:** Ship Confirm (dropdown)
- Go:** [Button]
- Done:** [Button]

2. Enter a name for the trip.

Note: If you do not define a name, a default name is assigned by Shipping Execution.

3. Select the Ship Method. For example, Overnight, LTL, and so on.

If you update Ship Method and one or more delivery legs of the trip have bill of lading numbers generated, Oracle Shipping Execution checks the Document Code for the Document Type BOL from the Document Categories form and:

- If Document Code is All, it updates ship method for the trip and all of its delivery legs.
 - If Document Code is One, it cancels all the bill of lading numbers associated with the trip and logs a trip exception. You then regenerate and reprint those bills of ladings.
4. If you have Oracle Transportation installed and you are utilizing Carrier Selection, the Carrier, Service Level, and Mode of Transport will populate automatically.

If the carrier selection process has been performed during the autocreate trip process, the information is displayed here and you can override it.

Note: If carrier selection is utilized in your organization, you will need to re-submit carrier selection if a change occurs within the order. For example, if a line is split after carrier selection has run, and the split would determine (based on your rules) that the carrier is changed, it must be re-submitted. The system will not automatically reassign the ship method in the even of a change to the order.

5. Select Plan from the Actions menu to enable the Planned check box.

Note: If the trip is planned, you cannot change the stops on the trip, but you can add deliveries to the trip as long as they are for existing stops. You can also unassign deliveries from trips and if the delivery is the last delivery on the stop, the stop will remain associated with the trip, however it will be empty.

6. Select Consolidate to specify that the trip should use consolidated shipping charges (if Oracle Transportation is utilized.)

Note: If Oracle Transportation is installed, Carrier Selection will be called by Order Management (or other line sources like Purchasing) when you perform the Action Select Carrier. This action will consolidate source lines into viable shipments and then it will call the Carrier Selection Engine to process each consolidation.

7. In the Vehicle region, select an Organization.
8. Select the Item Name for the vehicle such as 50' Truck.
9. Select the Number Prefix and Number for the selected vehicle.
10. Optionally, select a trip in the Arrive after Trip field if you want the new trip to follow after another trip.

In the Arrive after Trip field, you can define the order in which trips arrive at their final destination. For example, if you created Trip B and want it to arrive after Trip A, enter Trip A in the Arrive after Trip field.

11. Select a Tender Status for the trip (if Oracle Transportation is utilized.)
12. Optionally, enter Routing Instructions.
13. Click Done to save your work.

Note: If Oracle Transportation is installed and you have established routing guide rules, you can automatically assign Carrier, Service Level, Mode of Transport, and Freight Terms to a trip.

Planning a Trip

Once deliveries and delivery lines have been assigned to a trip, you can set the status of the trip to planned which prevents trip stops from being added, removed or re sequenced for the selected trip. This is useful for setting the trip stops and preventing them from being added, removed or re sequenced.

However, even if the trip is planned, you can still update trip details, delivery, and delivery line information. For example, you can add delivery lines and make changes to a delivery assigned to a planned trip. However, to add or remove trip stops, you first must set the status of the trip to unplanned before making these changes.

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 maximum number of containers in the delivery.
- Validates that the minimum fill percentage is met.
- Validates the planned trip date is not in the past.
- Validates pick-up and drop-off dates and times with the Transportation Calendar for the shipper, carrier, and receiver.

Prerequisites

At least two stops must be assigned to the trip.

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 find the trip.

The trip displays in the Shipping Transactions window.

2. From the Actions menu, select Plan.
3. Click Go or press Return to change the status of the trip to Planned.

A checkmark displays in the Planned box to indicate that the trip is in Planned status.

4. Save your work.

Unplanning a Trip

When a trip is in planned status, you cannot add, remove, or re sequence trip stops unless you first *unplan* the trip. When the trip is in unplanned status, you can remove or rescreens existing trip stops or add new stops.

After the changes are done, the trip can be re-planned to prevent the trip stop settings from being changed. However, if you leave the trip unplanned, the existing trip stops can be removed or re sequenced or new trip stops can be added.

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 unplan 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 find the trip.

The trip displays in the Shipping Transactions window. If more than one trip displays, select the trip you want to unplan.

2. From the Actions menu, select Unplan.
3. Click Go to change the status of the trip.
4. Save your work. The check mark disappears.

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, if you wanted to add additional costs to a particular vehicle that is used in the trip to deliver goods. A freight cost can also be assigned to a delivery, a stop, a delivery leg, a delivery detail, or a container.

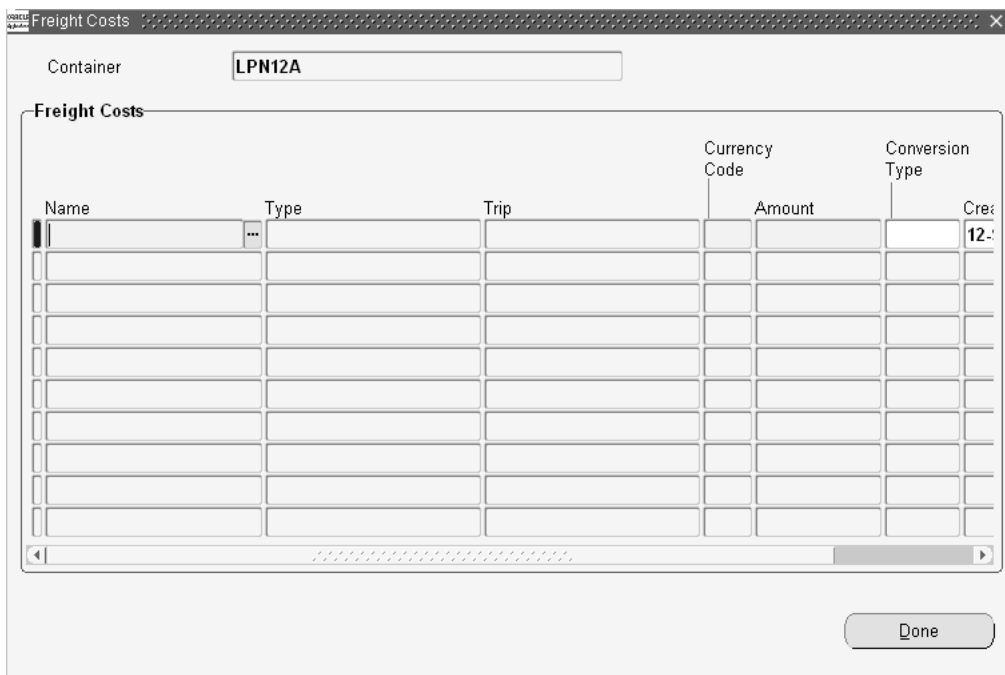
To assign freight costs to a trip:

1. Navigate to the [Query Manager](#) window, and find the trip.
The trip displays in the Shipping Transactions window.
2. From the Actions menu, select Assign Freight Costs to enter your freight costs.

Note: If Oracle Transportation is enable in your organization, you can utilize the Action Get Freight Costs to generate your freight costs automatically. If this Oracle Transportation option is utilized, the Freight Costs window will be displayed with the freight costs populated.

3. Click Go to display the Freight Costs window.

Figure 3–3 Freight Costs Window



4. Enter the Name, Type, Trip, Currency Code, Amount, Conversion Type, and Creation Date.
5. Click Done and save your work.

To view freight costs:

1. Navigate to the [Query Manager](#) window and find the trip.
2. In the Actions menu, select Assign Freight Costs and click Go.
3. View the freight cost information.

Type displays the freight cost type associated with the freight cost name. Freight cost name and freight cost type uniquely identify a freight cost charge.

Note: If Oracle Transportation is installed, carrier freight cost records display freight cost types of Transportation Charge, Transportation Rate, Transportation Discount, and Transportation Summary.

Trip is blank for manually entered freight costs. If Oracle Transportation is installed, Trip displays the trip name from which the carrier freight cost originates.

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 find the trip.
The trip displays in the Shipping Transactions window.
2. From the Actions menu, select Print Document Set.
3. Click Go.
The Document Sets window displays a list of document sets.
4. Select the document set and click OK.
The document set for the trip is printed.

Calculating Weight and Volume for a Trip

The weight and volume of a trip can be automatically or manually calculated. The default setting is set up in the Weight/Volume Calculation field in the Shipping Parameters window:

- If you select Automatic, the weight and volume is always calculated automatically at ship confirm based on values defined as the physical attributes in the Master Item window. Any weight/volume value is overwritten. The automatic calculation of weight and volume includes the fill percentage. Any weight/volume value manually entered is overwritten when ship confirm is initiated.
- If you select Manual, the weight/volume values entered in the delivery will be used at ship confirmation.

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.

Note: A vehicle must be assigned to the trip before the actual fill percentage can be calculated.

Prerequisites

All delivery lines must be assigned to deliveries.

Trip and/or delivery status must be set to Open.

To automatically calculate weight and volume for a trip:

If you selected Automatic in the Weight/Volume Calculation field in the Shipping Parameters window, the weight and volume is calculated automatically at ship

confirm. See Shipping Execution Setup, Defining Shipping Parameters in *Oracle Order Management Suite Implementation Manual*.

To manually enter weight and volume for a trip:

1. Navigate to the [Query Manager](#) window, and find the trip.
The trip displays in the Shipping Transactions window.
2. Select Details.
3. Enter your weights and volume.
4. Save your work.

Note: If Oracle Transportation is enabled, the calculation of weight and volume will affect the load tendering calculation within Oracle Transportation. For more information, refer to the *Oracle Transportation User's Guide*.

Load Tendering

If Oracle Transportation is enabled within your organization, you can utilize, among many other features, Load Tendering. Load tendering enables you to communicate the characteristics of a delivery with your carriers. Along with the need to have Oracle Transportation enabled, you must also have the Weight / Volume Calculation field, within the Shipping Transactions tab of the Shipping Parameters window, set to Automatic.

Only changes that are outside the defined tolerance will trigger the cancellation and resubmitting of the Load Tender to the carrier, enabling the carrier to accept or reject the new Load Tender.

For more information on Load Tendering, refer to the *Oracle Transportation User's Guide*.

Ship Confirming at Trip

You can execute ship confirm at the trip level. Within the Shipping Transactions window, after you have queried your trip, you can utilize Ship Confirm from the Action menu to engage the process.

Figure 3–5 Confirm Trip (Ship Confirm Trip) Window

The screenshot shows a window titled "Confirm Trip" with the following fields and options:

- Ship Options:**
 - Ship Entered Quantities (Unspecified Quantities: **Ship**)
 - Ship All
 - Backorder All
 - Cycle Count All
- Create Delivery for Staged Quantities
- Trip Options:**
 - Trip Stop: **M1 - Seattle:Seattle**
 - Actual Departure Date: **17-FEB-2003 07:28:02**
 - Set Delivery In-Transit
 - Create Bill of Lading
 - Close Trip
 - Defer Interface
- Document Set: **Ship Confirm Documents**
- Buttons: **OK** and **Cancel**

Note: You can ship confirm all deliveries, set deliveries in-transit, or close trip, if the deliveries have the same pickup location. If the trip has multiple pickups, Multiple is defaulted in the Pickup Stop field and you will not be able to choose any of the trip options. Clicking OK will confirm all deliveries at the initial pickup location and you must close the drop off stops manually. If the trip includes multiple pickup stops, you must manually ship confirm any delivery that is not part of the initial pickup otherwise it's pickup will not be closed. Ship confirming a trip only closes the pickup stop for deliveries that occur at the start of the trip; not intermediate pickup stops.

Refer to the topic To ship confirm a delivery on page 9-4 for detailed information on the various options within the Confirm Trip window.

Using Shipping Exceptions

Topics covered in this chapter include the following:

- [Overview of Shipping Exceptions](#) on page 4-2
- [Viewing and Updating Logged Shipping Exceptions](#) on page 4-3
- [Logging New Shipping Exceptions](#) on page 4-9
- [Purging Logged Shipping Exceptions](#) on page 4-14

Overview of 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.

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 do the following tasks:

- [View and update logged shipping exceptions](#)
- [Log a new shipping exception manually](#)
- [Purge logged shipping exceptions](#)

Note: Exceptions and processes for exception handling must already be set up before exceptions can be viewed, logged, or updated. For more information, see *Shipping Execution Setup, Defining Shipping Parameters* in *Oracle Order Management Suite Implementation Manual*.

Viewing and Updating Logged Shipping Exceptions

In the View Exceptions window, you can track, review, and update current and past exceptions that have been logged either manually or automatically.

You can use the Find Exceptions window to find selected exceptions or all exceptions. The search displays the results in a series of tabs in the View Exceptions window: the Exception tab displays general information about the exception such as the exception name and exception ID. The other tabs—Trip, Delivery, Container, and Inventory tabs—display additional information about the exception such as the trip, delivery, container, and inventory associated with the exception(s). This information helps you identify the source of the exception so you can take appropriate handling action.

You can also easily select a single exception to view or update it. Single exceptions display in the Log Exceptions window.

In both the View Exceptions and Log Exception windows, you can update details about a selected exception by choosing the tab that corresponds to the information you want to update, and updating the fields in that tab.

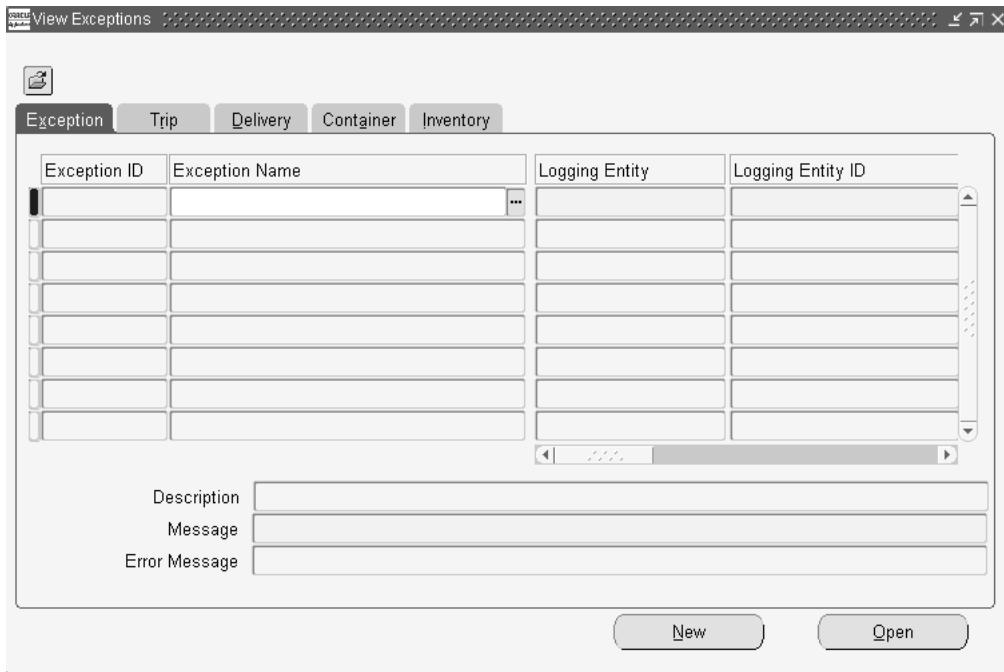
Some exceptions are set up to notify you automatically if an exception occurs during a shipping process (such as ship confirm). The notification alerts you that an exception has occurred and displays details to help you identify the exception.

Note: Exceptions and processes for exception handling must already be set up before exceptions can be viewed, logged, or updated. For more information, see *Shipping Execution Setup, Defining Shipping Parameters* in *Oracle Order Management Suite Implementation Manual*.

To view and update logged shipping exceptions:

1. Navigate to the [View Exceptions](#) window.

Figure 4–1 View Exceptions Window



- Choose the Find icon to display the Find Exceptions window.

Figure 4-2 Find Exceptions Window

The screenshot shows a window titled "Find Exceptions" with the following fields and controls:

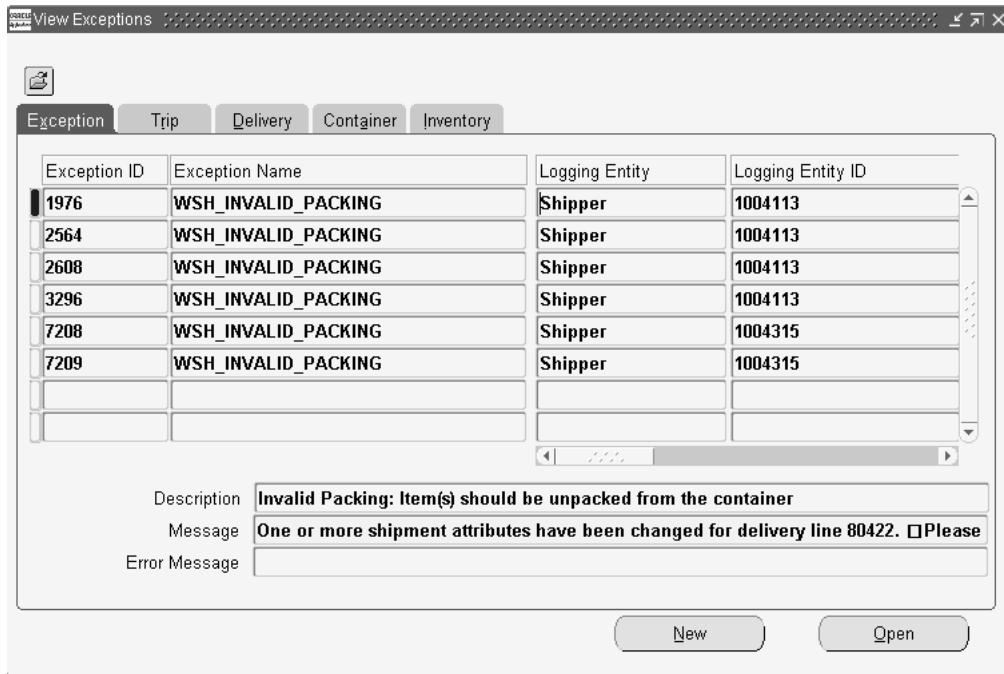
- Exception Name: Text input field with a search icon (magnifying glass) on the right.
- Logging Entity: Text input field.
- Logged At Location: Text input field.
- Exception Location: Text input field.
- Inventory Organization: Text input field.
- Exception Type: Text input field.
- Severity: Text input field.
- Delivery Name: Text input field.
- Status: Dropdown menu.
- Departure Date: Text input field followed by a hyphen and another text input field.
- Arrival Date: Text input field followed by a hyphen and another text input field.
- Creation Date: Text input field followed by a hyphen and another text input field.
- Buttons: Clear, New, and Find.

- Select one or more of the following criteria for your query. Select only the criteria for the exception(s) you want to find:

Note: To view all exceptions, leave the search fields blank and click Find.

- **Exception Name:** The particular name of the exception: for example, Picking Hold exception.
- **Logging Entity:** The log-on entity of the exception: shipper, receiver, or transportation carrier.
- **Logged At Location:** The location where the exception report was run (logged location may be different from where the shipping exception occurred).
- **Exception Location:** The location where the shipping exception occurred.
- **Inventory Organization:** Exceptions according to a particular inventory organization.

- Exception Type: Type of exception: delivery, picking, and trip
 - Severity: Type of exception severity:
 - Low (Low Impact Exception): A warning is issued but the operation can be completed.
 - Medium (Medium Impact Exception): Operation cannot be completed without handling the exception.
 - High (High Impact Exception): Operation cannot be completed without handling the exception.
 - Delivery Name: Exceptions by delivery.
 - Status: Describes the current status of the exception:
 - Open: Initial status—not yet associated with an exception name.
 - Manual: This exception needs to be processed manually.
 - No Action Required: No handling required for this exception.
 - Not Handled: This exception could not be handled.
 - Departure Date: Exceptions according to the departure date.
 - Arrival Date: Exceptions according to the arrival date.
 - Creation Date: Exceptions according to the date the exception was created.
4. Once you have completed your entries, click Find to display the search results in the View Exceptions window.

Figure 4–3 View Exceptions Window (with results)

- Click the tab that corresponds to the information you want to view or update. For example, to update trip information for an exception, choose the Trip tab. Choose from the following tabs:

Exception tab: Displays general details about the exception ID, such as the exception ID, exception type, exception name, and a description of the exception.

Trip tab: Displays information about the trip name, departure date, and arrival date.

Delivery tab: Displays the delivery name and delivery detail ID about the exception.

Container tab: Displays the container name, associated with the exception.

Inventory tab: Displays the inventory information for the exception including the inventory organization, inventory item, item description, lot number,

revision, serial number, UOM (unit of measure), quantity, subinventory, and locator.

6. Optionally, to view or update a single exception:
 - Select the exception in the View Exceptions window.
 - Click Open to display the selected exception in the Log Exception window.

Figure 4–4 Log Exception Window

The screenshot shows a window titled "Log Exception" with three tabs: "Exception", "Trip/Delivery/Container", and "Inventory". The "Exception" tab is selected. The form contains the following fields:

- Exception ID: 1976
- Exception Type: Delivery Exception []
- Exception Name: WSH_INVALID_PACKING
- Description: Invalid Packing: Item(s) should be unpacked from the container
- Message: One or more shipment attributes have been changed for delivery line 80422. Please
- Error Message: (empty)
- Severity: Low
- Status: Closed
- Manually Logged
- Logging Entity:
 - Logging Entity: Shipper
 - Logging Entity ID: 1004113
- Location:
 - Logged At Location: V1- New York City : 90 Fifth
 - Exception Location: V1- New York City : 90 Fifth

An "OK" button is located at the bottom right of the window.

- Choose the tab to display the details that you want to view or update: Exception tab, Trip/Delivery/Container tab, or Inventory tab.
- View or update the available fields in the selected tab.
- Click OK to save your changes.

Logging New Shipping Exceptions

During the shipping and transportation of goods, situations can arise that conflict with the requirements of the shipper, transportation carrier or customer. These situations are known as exceptions and can occur during a business process such as transporting a shipment. Exceptions can be logged by different (logging) entities (such as a transportation carrier) for a variety of business reasons: for example, invalid packing or changing a planned delivery.

Some exceptions use workflows to automate certain process such as exception notification and handling. Other exceptions need to be logged manually because either the exception does not occur during the workflow process or requires manual logging.

The following outlines a simple shipping process that requires a manual exception to be logged:

Process: Transport Shipment

Logging Entity: Customer, Transportation Carrier

Exception: The transportation carrier does not deliver goods to the customer in time.

Handling: The exception should be logged and customer may be given discount for their inconvenience. Transportation carrier may be charged for the delay.

There are two ways of logging a manual exception. You can either:

- Select an existing exception name as a “template” to which you can add specific shipping entity details. For example, if you had a seeded exception called Picking Hold that defined handling for picking exceptions, you could enter the exception name *Picking Hold* in the Log Exception window to default the handling procedures into the new exception window. Then you only need to add information about the specific shipping entities you are logging the exception against such as the trip name, delivery, or container.
- Log a new exception without selecting an exception name. This is useful if you want to create a new exception not based on the default values of an existing exception name.

To log a new shipping exception

1. Navigate to the [Log Exceptions](#) window.
2. Select an exception name or optionally, leave this field blank.

When you select an exception name, the exception definition associated with that name defaults into the Log Exception window. After the values default into the window, you can update fields you want to change (those not grayed out). For example, you may want to change the severity of the exception.

If you do not want to use an existing exception name, leave the Exception Name blank and complete the fields required for the new exception you are logging:

3. Enter a message for the exception.
4. Enter an error message in the Error Message field, if the Status field displays an Error status. If any other status displays, you cannot make any entries in the Error Message field.

Usually, the error message is updated by the exception handling process. However, you can manually update it if the status is Error.

5. Select the severity of the exception:
 - Low (Low Impact Exception): A warning is issued but the operation can be completed.
 - Medium (Medium Impact Exception): Operation cannot be completed without handling the exception.
 - High (High Impact Exception): Operation cannot be completed without handling the exception.
6. The Status is determined by your other selections:
 - If an exception name is defined, the initial status defaults to the status of the exception definition. If the exception handling is Workflow, the initial status is set to Logged. If the exceptions handling is Manual or No Action Required, the initial status is set to Manual or No Action Required respectively. The status displays after the exception is saved.
 - If no exception is named (the Exception Name field is blank), then the exception status is Open.

One of the following statuses can display in the Status field:

- Open: Initial status—not yet associated with an exception name.
- Manual: This exception needs to be processed manually.
- No Action Required: No handling required for this exception.
- Not Handled: This exception could not be handled.

- Logged: This exception is logged with appropriate exception name or user assigns appropriate exception name to an OPEN exception.
 - In Process: The workflow process has been started for this exception.
 - Error: Error exception handling failed.
 - Closed: Exception handling was completed successfully.
7. The Manually Logged box is automatically checked if this exception is logged manually in the Log exception window. It is unchecked if it is logged through a program.
 8. Select the logging entity of the person logging the exception such as Receiver, Shipper, or Transportation Carrier.
 9. Enter the logging entity ID to identify the individual who is logging the exception.
 10. Enter the logged at location to identify the location the logging entity belongs to.
 11. Select the exception location where the exception occurred.
 12. When you have completed your entries in the Exception tab, choose the Trip/Delivery/Container tab:
In the Trip/Delivery/Container tab:
 13. Select the trip name of the shipping exception. The Stop Location field defaults with the stop locations for the particular trip.

Figure 4–5 Log Exceptions Window - Trip/Delivery/Container Tab

The screenshot shows a window titled "Log Exception" with three tabs: "Exception", "Trip/Delivery/Container", and "Inventory". The "Trip/Delivery/Container" tab is selected. The window is divided into three main sections: "Trip", "Delivery", and "Container".

- Trip Section:** Contains four input fields: "Trip Name" with the value "17208", "Stop Location", "Departure Date", and "Arrival Date".
- Delivery Section:** Contains two input fields: "Delivery Name" and "Delivery Detail ID" with the value "80422".
- Container Section:** Contains one input field labeled "LPN".

An "OK" button is located at the bottom right of the window.

14. Select the departure date for the trip. This window validates the arrival date is later than the departure date.
15. Select the arrival date of the trip. This window also validates that the arrival date is later than the departure date.
16. Select the delivery name of the exception.
17. Select the delivery detail ID of the delivery.
18. Select the container name of the exception.
19. Choose the Inventory tab:
20. Enter the inventory item involved in the exception. If the inventory item is not specified or if the exception name selected is not an inventory exception, the inventory fields are grayed and you cannot make any entries.

Figure 4–6 Log Exceptions Window - Inventory Tab

The screenshot shows a window titled "Log Exception" with three tabs: "Exception", "Trip/Delivery/Container", and "Inventory". The "Inventory" tab is selected. The form contains the following fields:

- Exception ID: [Text Box]
- Exception Type: [Text Box] []
- Exception Name: [Text Box] ...
- Description: [Text Box]
- Message: [Text Box]
- Error Message: [Text Box]
- Severity: [Text Box]
- Status: [Dropdown Menu]
- Manually Logged
- Logging Entity:
 - Logging Entity: [Text Box]
 - Logging Entity ID: [Text Box]
- Location:
 - Logged At Location: [Text Box]
 - Exception Location: [Text Box]

An "OK" button is located at the bottom right of the window.

21. If you are logging an exception against an inventory item, enter details about the item. If the exception is not logged against an inventory item, then the fields are grayed out.

The following fields are dependent on the inventory item: item description, revision, serial number, lot number, unit of measure (UOM), and quantity:

- The Item Description field displays the default description of the inventory item.
- The Lot Number field displays the default lot number of the inventory item.
- The Serial Number field displays the default serial number of the inventory item.
- The UOM field displays the default unit of measure of the inventory item.
- The Quantity field displays the quantity for the inventory item.
- The Subinventory field displays the subinventory associated with the inventory organization.
- The Locator field is dependent on the Subinventory field. It is enabled only if the Subinventory field is populated.

22. Choose OK to save your changes.

Purging Logged Shipping Exceptions

To help maintain your shipping exception records and conserve computer storage space, you may want to purge (delete) logged shipping exception records that are no longer required. For example, you may want to purge shipping exception records that are five months and older.

You also may want to mass change the status of (resolve) shipping exceptions.

You must use the Resolve/Purge Exceptions Parameters window to resolve and purge shipping exceptions. You cannot select, resolve, and purge shipping exception records from the View Exceptions window.

Caution: Be careful when resolving and purging (deleting) shipping exception records—you cannot undo the action or retrieve your purged data.

To resolve and purge selected logged shipping exceptions:

1. Navigate to the [Resolve/Purge Exceptions Parameters](#) window. In the Shipping Transactions window, from the Tools menu, select Resolve Exceptions Form. On the View Exceptions window, from the Tools menu, select Resolve/Purge Exceptions.

Figure 4-7 Resolve/Purge Exceptions Parameters Window

The screenshot shows a window titled "Resolve/Purge Exceptions Parameters". It contains the following fields and controls:

- Request Id:
- Exception Name:
- Logging Entity:
- Logged At Location:
- Exception Location:
- Exception Type:
- Severity:
- Delivery Name:
- Status:
- Departure Date: -
- Arrival Date: -
- Creation Date: -
- Data older than number of days:
- Action:

Buttons at the bottom: , ,

Select and enter only the criteria required for your resolve or purge:

- Request ID: Purges exceptions by a particular Request ID.
- Exception Name: Purges exceptions by exception name.
- Logging Entity: Purges exceptions by a particular logging entity.
- Logged At Location: Purge exceptions by logged at location. This is the location the logging entity belongs to.
- Exception Location: Purges exceptions by location. This is the location where the shipping exception occurred.
- Exception Type: Purges exceptions by exception type such as a delivery exception or picking exception.
- Severity: Purges exceptions by exception severity.

Low (Low Impact Exception): A warning is issued but the operation can be completed.

Medium (Medium Impact Exception): Operation cannot be completed without handling the exception.

High (High Impact Exception): Operation cannot be completed without handling the exception.

- Delivery name: Purges exceptions for the delivery.
- Status: Purges exceptions by status:
 - Open: Initial status not yet associated with an exception name.
 - Manual: This exception needs to be processed manually.
 - No Action Required: No handling required for this exception.
 - Not Handled: This exception could not be handled.
- Departure Date: Purges exceptions by range of departure dates. For example, if you enter 20-MAY-2000 to 29-MAY-2000, exceptions with departures in this date range are purged.
- Arrival Date: Purges exceptions by range of arrival dates. For example, if you enter 20-MAY-2000 to 29-MAY-2000, exceptions with arrivals on and between this date range are purged.
- Creation Date: Purges exceptions by range of creation dates. For example, if you enter 20-MAY-2000 to 29-MAY-2000, exceptions created on or between this date range are purged.
- Date older than number of days: Purges exceptions older than the number of days entered. For example, if you enter 25, exceptions 25 days and older are purged.
- Action: Mass updates (resolves) the status of exceptions selected by the other criteria to the selected status but does not purge them.

Caution: Be careful when resolving or purging (deleting) shipping exception records—you cannot undo the action or retrieve your purged data.

2. Choose Submit to resolve or purge the exceptions.

To purge all logged shipping exceptions

1. Navigate to the [Resolve/Purge Exceptions Parameters](#) window.
2. To purge all exceptions, leave all the fields blank in the Resolve/Purge Exceptions Parameters window and select Purge from the Action list of values.

3. Click Submit to display the Decision box.
4. Choose Yes to purge all logged shipping exceptions or choose No to cancel the purge.
5. If you chose Yes, the logged exceptions are purged.

Managing Deliveries

Topics covered in this chapter include the following:

- [Overview of Deliveries](#) on page 5-2
- [Creating a Delivery](#) on page 5-5
- [Auto-creating Deliveries](#) on page 5-10
- [Viewing Shipping Status](#) on page 5-11
- [Manual Packing Delivery Lines for a Delivery](#) on page 5-15
- [Auto-packing Delivery Lines assigned to Deliveries into LPNs](#) on page 5-16
- [Automated Packing](#) on page 5-17
- [Unpacking a Delivery](#) on page 5-20
- [Calculating Weight and Volume for a Delivery](#) on page 5-21
- [Generating a Loading Sequence for Delivery Lines in a Delivery](#) on page 5-22
- [Printing a Document Set for a Delivery](#) on page 5-24
- [Assigning Deliveries to a Trip](#) on page 5-25
- [Assigning Freight Costs to a Delivery](#) on page 5-27
- [Unassigning a Delivery from a Trip](#) on page 5-31
- [Closing a Delivery](#) on page 5-31
- [Planning a Delivery](#) on page 5-32
- [Unplanning a Delivery](#) on page 5-32
- [Reopening a Delivery](#) on page 5-33
- [One Step Shipping](#) on page 5-33

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. In a delivery, you can include items from different sales orders as well as back orders. You can group multiple deliveries together to create a trip.

More than one trip may be required to complete a delivery. For example, a delivery can consist of two trips, the first trip by truck and the second trip by rail.

You can perform the following tasks including:

- [Creating new deliveries](#)
- [Auto creating deliveries](#)
- [View shipping status](#)
- [Manual packing of delivery lines](#)
- [Auto packing delivery lines into LPNs](#)
- [Unpacking deliveries](#)
- [Calculating weight and volume for a delivery](#)
- [Generating a load sequence](#)
- [Printing a document set](#)
- [Assigning a delivery to a trip](#)
- [Assigning freight costs to a delivery](#)
- [Unassigning a delivery from a trip](#)
- [Closing a delivery](#)
- [Planning a delivery](#)
- [Unplanning a delivery](#)
- [Re-opening deliveries](#)
- [One-step shipping](#)

Note: If you utilize Oracle Transportation, compatibility constraints can be used in the shipping process up through ship confirmation.

Compatibility Constraints enable you to define a variety of transportation related restrictions related to items (goods for shipment), carriers, modes of transport, facilities, organizations, and customers. Then, these restrictions are used by the application to warn or prevent further order processing if the defined undesirable condition is encountered. For example, you can define an item-carrier compatibility constraint stating that designated carriers cannot transport specific inventory items. When a delivery is created violating the constraint, an error or warning message will be generated. You determine the severity of the constraint violation; whether a warning or error should display.

For more information, refer to the *Oracle Transportation User's Guide*.

You can either manually or automatically group delivery lines to create a delivery. If a delivery is auto-created, the delivery lines are grouped together by the mandatory default criteria, Ship From Location and Ship To Location. However, additional grouping criteria can be included such as:

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

If you auto-create a trip for delivery lines, the process creates a delivery also. If you generate a bill of lading number, and then unassign the delivery lines from the delivery, the delivery lines are also unassigned from the trip and the delivery retains the bill of lading number. To remove the bill of lading number, unassign the delivery from the trip.

XML Transactions

If Oracle Transportation is installed, XML transactions can be used to transmit delivery details to the carrier manifesting system. Once the carrier manifesting

system has processed the delivery, the shipping details are transmitted back to Oracle Transportation using an XML shipment response transaction.

Transactions with Carrier Manifesting Systems

You can send an outbound message to a carrier manifesting system, including data pertinent to the delivery, that will allow the manifesting system to calculate the total weight, calculate the total freight costs, and produce the required shipping labels and paperwork for shipment. The XML transaction is used to build a data file based on the original customer sales order. After the carrier manifesting system has performed its functions, Oracle Transportation will receive shipment information from the manifesting system in the form an XML Shipment Response transaction. The data transmitted will have the information required to complete the shipment, including designated carrier, vehicle information, freight costs, and other information.

Note: You can use the Action View Message History to view the history of XML messages that have been exchanged. This Action is only available if Oracle Transportation is installed any only if you have the appropriate privilege assigned to your role.

To enable XML Transactions for carrier manifesting, you must do the following:

- Enable Carrier Manifesting Organization in Oracle Shipping Execution. (In the Organization Parameters window, ATP, Pick, Item Sourcing tabbed region, select Carrier Manifesting Organization.)
- Select Enable Manifesting for the carrier in Shipping Execution. (In the Carrier window, query the specific carrier and select Enable Manifesting.)
- Grant the user privilege Send Outbound XML Messages.

To initiate an XML transaction within the Shipping Transactions window, select the delivery action Send Outbound Message. A pop up window displays and you can select from the following transactions that send the corresponding XML transactions:

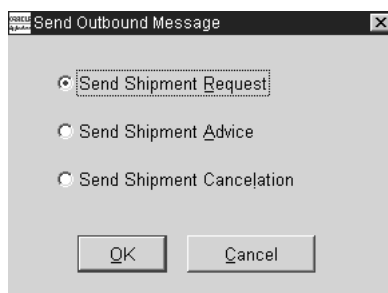
- Send Shipment Request: Shipment must be pick released and packed. Oracle Transportation will extract shipment information and send it to the carrier manifesting system. This can be accomplished using an XML transaction (Request Shipment).

When a shipment request is sent, the delivery is locked to prevent updates while it waits for feedback from the carrier manifesting system. If you want to

update the delivery details, you can unlock the delivery by using the Send Shipment Cancellation.

- Send Shipment Advice: Not currently used.
- Send Shipment Cancellation: Transmits a message to the carrier's manifesting system to cancel the shipment request

Figure 5–1 Send Outbound Message Window



Note: Outbound messages can be sent for one delivery at a time or as a batch using a concurrent program.

Creating a Delivery

You can create a delivery in the Delivery window either manually or automatically. Additionally, a delivery can be auto-created at pick release by selecting Auto-create Deliveries in the Shipping Parameters window. See Shipping Execution Setup, Defining Pick Release Parameters in *Oracle Order Management Suite Implementation Manual*.

Note: If the delivery has lines from internal orders, between operating units, the Ship To Date is the Expected Delivery Date in the Supply Demand window (Oracle Inventory).

To create a delivery:

1. Navigate to the [Delivery](#) window.

Note: If the delivery has lines from internal orders between operating units, the Ship To Date is the Expected Delivery Date in the Supply Demand window within Oracle Inventory.

Figure 5–2 Delivery Window

The screenshot shows the Oracle Delivery - 8338 window with the following fields and values:

- Name:** 8338
- Organization:** M1 Seattle Manufacturing
- Initial Ship from:** M1- Seattle : 3455 108th Avenue
- Ultimate Ship to:** 1644 : 2391 L Street-San Jose
- Intermediate Ship to:** (empty)
- Pooled Ship to:** (empty)
- Consignee:** World of Business
- Ship Method:** 753...
- Service Level:** (empty)
- FOB:** (empty)
- Status:** Open
- Planned:**
- Exceptions:**
- Ship from Date:** 08-FEB-2001 00:00:00
- Ship to Date:** 08-FEB-2001 00:00:00
- Number of LPNs:** (empty)
- Waybill:** 224566
- Freight Terms:** Prepay & Add
- Carrier:** (empty)
- Mode of Transport:** (empty)
- FOB Location:** (empty)
- Load Seq.:** (empty)
- Lines Loading:** (empty)
- Additional Information:** (empty)
- [Trading Partner]:** []

Weight and Volume summary:

- Gross Weight:** 25 UOM Lbs
- Tare Weight:** 0
- Net Weight:** 25
- Volume:** 2 UOM FT3

Buttons: Actions Pick and Ship, Go, Done

2. Enter a Name and Organization for the delivery.

Note: If an open exception has been logged and needs to be resolved, the Exceptions check box will be checked and displayed in red. Otherwise, the Exceptions check box will not be checked.

3. Select the Initial Ship from location, Ship from Date, Ultimate Ship to location, Ship to Date, Intermediate Ship to location, and Pooled Ship to, if applicable.

You can change Intermediate Ship-to regardless of whether it is part of the delivery grouping rule.

Note: The Ship from Date is the earliest schedule date for the sales order lines assigned to the delivery.

The Ship to Date is the earliest scheduled date for all of the delivery details assigned to the delivery.

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

4. Enter the number of LPNs in the delivery, if applicable.
5. Enter the waybill number.
6. Select the Consignee, Freight Terms, Ship Method, Carrier, Service Level, Mode of Transport, FOB, FOB Location, Gross Weight, Gross Weight UOM, Tare Weight, Net Weight, Volume, and Volume UOM.

Note: The fields Carrier, Service Level, and Mode of Transport are for information only. The information in these fields is not used for any functionality unless you have Oracle Transportation installed.

You can change freight terms, ship method, and FOB regardless of whether they are part of the delivery grouping rule. In addition, you can only change ship method if the delivery is not assigned to a trip.

Note: If your organization does not have FOB as an enforced grouping attribute, the FOB field will not be populated when you auto-create a delivery or when you assign a line to an LPN.

7. Enter the load sequence (Load Seq) number and the Lines Loading pattern to determine the order in which lines are loaded into a container or lines loaded within a delivery, if applicable. The order lines must be associated with a Customer Production Sequence on the Sales Order pad.

You can select from Forward, Reverse, Forward-Inverted, or Reverse-Inverted. Refer to the topic [Generating a Loading Sequence](#) on page 5-22.

Note: If Oracle Transportation is installed and you have established routing guide rules, you can automatically assign Carrier Service Level, Mode of Transportation, and freight terms to a delivery. For more information, refer to the *Oracle Transportation User's Guide*.

8. Select the Additional Delivery Information tab and optionally define the following fields:
 - Export Port of Loading: The port name designated where the delivery will be placed on the sailing vessel for transport to a foreign country.
 - Import Port of Discharge: The port name designated where the delivery will be removed from the sailing vessel and positioned until it can continue enroute to the destination.
 - FTZ Number: (Foreign Trade Zone) number is an identification number typically assigned by Customs to identify the zone. An FTZ is a geographic area where imported goods can be staged and inventoried duty-free (of import taxes) until they are brought into the customs territory. If a company imports merchandise into an FTZ, their internal inventory tracking procedures are required to identify this merchandise as being in or shipping from an FTZ.

Figure 5–3 Deliveries Window - Additional tab

The screenshot shows a software window titled "Delivery - 8376" with four tabs: "Delivery", "Additional Delivery Information" (selected), "Legs", and "Packing Slip". The "Additional Delivery Information" tab contains the following fields:

- Delivery:
- Status:
- Export Port of Loading:
- Import Port of Discharge:
- Routing Instructions:
- FTZ Number:
- Entry Number:
- In Bond Code:
- Shipping Marks:
- Problem Contact:
- Auto Ship Confirm Batch:
- Auto-pack Batch:
- Enable Auto Ship Confirm:
- Enable Auto Pack:

A "COD" (Cash on Delivery) section is also present, containing:

- Amount:
- Currency:
- Remit To:
- Paid By:

At the bottom of the window, there is an "Actions" dropdown menu set to "Pick and Ship", a "Go" button, and a "Done" button.

- **Entry Number:** Entry numbers are assigned to each importation into a customs territory. The entry number identifies the merchandise and entry particulars to the importer and Customs. The entry number in the United States consists of a long digit format that includes both numbers assigned by Customs and the importer, or customs broker. If a company is importing merchandise they should to keep a record of the merchandise and its corresponding entry number in their internal systems.
- **In Bond Code:** In bond defines cargo moving under Customs control where duty has not yet been paid. If the shipment is moving under a bond, report of the 2-character In-Bond Code is required by regulation. Examples are IT (In-Transit) or IE (Immediate Re-Export).
- **Shipping Marks:** Shipping marks are used to identify the truck, railcar, export container, or other vehicle in which the delivery is transported. For example, railcar UTLX 65632 or export container APL 35465. These identifying marks are stenciled on the side of the vehicle or container.

- Problem Contact: You can define a contact in case of problems with the delivery.
 - Auto Ship Confirm Batch: Displays the batch the delivery was included in when the Auto Ship Confirm program ran.
 - Auto Pack Batch: Displays the batch that the delivery lines, associated with this delivery, were included in when Auto Pack ran.
 - Enable Auto Ship Confirm: Enables the delivery to be considered for Auto Ship Confirm. The default is enabled. You can uncheck if you do not want the delivery to be considered.
 - Enable Auto Pack: Enables the delivery lines to be considered for Auto Packing. The default is enabled. You can uncheck it if you do not want the delivery lines to be considered.
 - COD: You can enter cash on delivery information including Amount, Currency Code, Remit to, and Paid by.
 - Routing Instructions: You can enter free form instructions for routing this delivery.
9. Select Done to save your work.

Note: Order lines belonging to different operating units can be combined into a single delivery. However, the order lines will not be successfully processed during invoicing. Delivery based invoicing is not supported if order lines within the delivery belong to different operating units.

Auto-creating Deliveries

You can automatically create deliveries for delivery lines that are not assigned to a delivery. Additionally, you can auto-create at pick release by selecting Auto-create Deliveries in the Shipping Parameters window. See Shipping Execution Setup, Defining Pick Release Parameters in *Oracle Order Management Suite Implementation Manual*.

One or more deliveries can be created depending on the default delivery grouping criteria set up in the Shipping Parameters. For example, if two groups of delivery lines have different Ship To addresses, a different delivery number is assigned to each group.

If you have sales orders with ship sets, place all delivery lines of each ship set on one delivery.

This process does not apply to the parameter setting for Autocreate Delivery Criteria on the Shipping Parameters form, Pick Release tabbed region. This option applies only to auto-creation at pick release.

Prerequisites

Delivery status must be Open.

To auto-create deliveries:

1. Navigate to the [Query Manager](#) window, and find the delivery lines that you want to add to a delivery.

The delivery lines are displayed 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 Go to create a delivery for the selected lines.

You can view the delivery name created for the delivery lines in the Delivery column in the Lines/Containers tab.

5. Choose the Delivery tab to view or add additional delivery details.
6. Save your work.

See

Shipping Execution Setup, Defining Delivery Grouping Parameters in *Oracle Order Management Suite Implementation Manual*.

Viewing Shipping Status

Use the View Shipping Status window to view the shipping status of all of the delivery details of a delivery from an Order Entry line. The shipping status includes the following types of information:

- Quantity: For example, ordered quantity, pick released quantity, back ordered quantity, ship confirmed quantity.
- Line status: The current status for each delivery line and the next step needed to progress the delivery line.

You access the window from the Shipping Transactions window, Delivery tabbed region. From the Actions menu, you can view the shipping status of all delivery lines associated with the delivery. Also, you can view the shipping status of an order's delivery lines within the Order Organizer, Sales Order pad at the header level, and Sales Order pad at the line level, by selecting Action view shipping status.

Note: You can only utilize the View Shipping Status feature if the Role that you are assigned to has the View Shipping Status box selected in the Define Roles window.

Shipping Status Information

This section details the shipping status information that you can see on the View Shipping Status window.

The main region displays each of the order lines belonging to the delivery with its summary information. Select any sales order line and view delivery detail information in the Delivery Line Details region.

The main region information is:

- Delivery Name is displayed in the title bar.
- Order Number and Line: The sales order number and line associated with the delivery.
- Ordered Item, UOM, and Quantity Ordered: The delivery detail item, delivery detail unit of measure (the item primary unit of measure), and sales order line ordered quantity in primary unit of measure.
- Quantity Delivery Requested: The requested quantity assigned to the delivery from the order line.
- Quantity Not Ready to Release: Total requested quantity from the delivery lines (associated with this order line) at status Not Ready to Release.
- Quantity Ready to Release: Total requested quantity from the delivery lines (associated with this order line) at status Ready to Release.
- Quantity Released To Warehouse: Total requested quantity from the delivery lines (associated with this order line) at status Released to Warehouse.
- Quantity Back ordered: Total back ordered quantity from the delivery lines (associated with this order line) at status Back ordered.

- Quantity Staged/Pick Confirmed: Total picked quantity from the delivery lines (associated with this order line) at status Staged/Pick Confirmed.
- Quantity Shipped: Total shipped quantity from the delivery lines (associated with this order line) at status Shipped.
- Quantity Interfaced: Total interfaced quantity from the delivery lines (associated with this order line) at status Interfaced.

The Delivery Line Details region information is:

- Delivery Name, Detail, Quantity, and Line Status: Identifying information from the delivery detail.
- Next Step: The next action needed to progress the delivery line. It does not apply to delivery details with statuses Interfaced and Cancelled. This table details the next step for each delivery line.

Table 5–1 Next Step Information

Current Delivery Detail Status	Next Step
Not Applicable	Ship Confirm
Not Ready to Release	Progress Order to Awaiting Shipping
Ready to Release	Run Pick Release
Back ordered	Run Pick Release
Released to Warehouse	Transact Move Order
Staged/Pick Confirmed	Ship Confirm/Close Trip Stop
Shipped	Run Interfaces or Close Trip Stop

- Ship Method: The carrier passed from the sales order line to be used for shipping the goods. This ship method may be changed at the delivery level or at ship confirmation. The ship method may also change automatically if Oracle Transportation is installed and rating rules select a different carrier. The ship method in delivery line details will always display the carrier passed from the sales order line regardless of whether a different ship method is selected from within the Shipping Transactions window.
- Actual Departure Date: The date that the carrier departed on the current leg of the trip.

- **Actual Arrival Date:** The date that the carrier arrived from the current leg of the trip.
- **Tracking Number:** Delivery detail tracking number.
- **Bill of Lading Number:** Delivery detail bill of lading numbers. If there are bill of lading numbers for each delivery leg, a pop-up window shows the numbers.
- **Waybill Number:** The delivery detail waybill number.
- **Move Order Number and Move Order Line Number:** For delivery details with statuses Released to Warehouse and Staged/Pick Confirmed, the delivery detail move order number and move order line number.

To view shipping status:

1. Navigate to the [Shipping Transactions](#) window.
2. In the Query Manager, query the delivery in which you are interested.
3. When the Data Manager displays, navigate to the Deliveries tabbed region.
4. In Actions, select View Shipping Status and click Go.
5. View shipping status for all of the delivery lines of the delivery.

Figure 5-4 View Shipping Status Window

View Shipping Status: Delivery (14112) - Computer Services and Rentals

Order Number	Line	Ordered Item	UOM	Ordered	Delivery Requested	Not Ready to Release	Ready to Release	Released to Warehouse
53067	2.1	AS54888	Ea	2.33334	2.33334			

Quantity

Delivery Line Details

Delivery Name	Detail	Quantity	Line Status	Next Step	Ship Method	Actual Departure Date	Actual Arrival Date
14112	81579	2.33334	Interfaced	Not Applicable		20-DEC-2002 10:03:4	

Done View Picking Request View Exception

- View Picking Request is enabled if the delivery detail has status Staged, Released to Warehouse, or Interfaced. Click it to view the pick release request for the delivery detail.
- View Exception is enabled if the delivery detail has exceptions associated with it. Click it to view the shipping exceptions for the delivery detail.
- When you are finished viewing shipping status, click Done.

Manual Packing Delivery Lines for a Delivery

You can pack delivery lines into containers which prevents changes to containers/lines assigned to containers within the delivery.

Once a delivery is packed, the delivery line information cannot be changed until you unpack the delivery. If the Weight/Volume Calculation in Shipping Parameters is set to Automatic, the weight and volume is calculated at ship confirm.

Prerequisites

The delivery must be open.

At least one delivery line must be assigned to the delivery you want to pack.

To pack an entire delivery without details required:

1. Navigate to the [Query Manager](#) window, and find the delivery you want to pack.

The delivery displays in the Shipping Transactions window.

2. Choose the Contents tab, and select the delivery lines you want to pack.
3. From the Actions menu, select Pack.
4. Click Go.

The Containers window appears.

5. Select the container.
6. Click OK.

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

7. Save your work.

Auto-packing Delivery Lines assigned to Deliveries into LPNs

You can auto-pack delivery lines for a delivery into LPNs (containers). When you auto-pack a delivery, the delivery lines are grouped together by shared attributes such as the Ship To location, and are packed into LPNs based on the grouping and LPN type.

Once a delivery is packed, the delivery line information cannot be changed until you unpack the delivery. If the Weight/Volume Calculation in Shipping Parameters is set to Automatic, the weight and volume is calculated at ship confirm.

Prerequisites

All delivery lines must be assigned to a delivery.

A container-item relationship must be defined for the delivery line item and container item. See *Shipping Execution Setup, Defining Freight Carrier Ship Method Relationships* in *Oracle Order Management Suite Implementation Manual*.

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

1. Navigate to the [Query Manager](#) window, and find delivery you want to pack.

The delivery displays in the Shipping Transactions window.

2. Choose the Contents tab.
3. Select the delivery lines you want to pack.
4. From the Actions menu, select Auto-pack or Auto-pack Master.

Auto-pack Master will enable to system auto-pack the delivery then pack it again into another container. For example, you can auto-pack a delivery into a container, then pack that container into another container, such as a pallet or an export container.

5. Click Go.

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

6. Save your work.

Automated Packing

Automated Packing enables you to auto pack individual deliveries as needed, or concurrently during pick release. This helps avoid the process of invoking auto packing for individual deliveries. You can execute Automated Packing as needed using Auto-Pack Deliveries SRS or as a concurrent process along with the pick release process.

The Auto-pack Report is printed automatically at the end of the Automated Packing procedure. Refer to the topic [Auto-pack Report](#) on page 11-25 for more information.

Prerequisites

All delivery lines must be assigned to a delivery. This can be accomplished by auto creating the delivery in the Shipping Transactions window or at Pick Release.

A container-item relationship must be defined between the delivery line item and the container item. Refer to Setup Container-load Relationships for Containers and Items in Appendix K of the *Oracle Order Management Suite Implementation Manual*.

To automatically execute Automated Packing during Pick Release

1. Navigate to the [Release Sales Orders for Picking](#) window.
2. Query the specific sales order, or query the batch number.

Note: For detailed information on running Pick Release and the Release Sales Orders for Picking window, refer to the topic [Releasing Sales Orders for Picking](#) on page 8-14 of this guide.

3. Within the Inventory tab, enable Auto Pick Confirm by selecting Yes from the list of values.
4. Within the Shipping tab, enable Autocreate Deliveries by selecting Yes from the list of values.

Note: If the delivery lines are already assigned to a delivery, you must also select Include Assigned Lines check box.

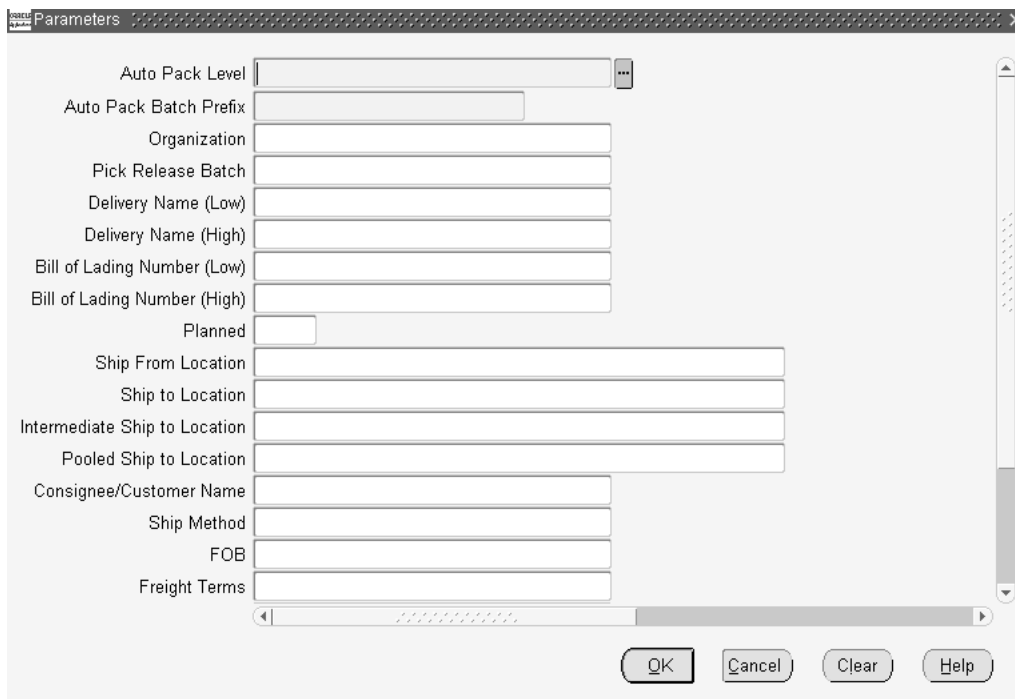
5. In the Autopack Delivery field, select either Yes (the system will auto pack the delivery lines), or Autopack Master (the system will pack the delivery lines into two levels of containers.)
6. Proceed with the remaining tasks to complete the release of your sales order.

To Auto Pack Deliveries using SRS:

1. Navigate to the [Auto-Pack Deliveries SRS](#) window.
2. Populate the parameter fields as needed, including the following:
 - Auto Pack Level: Select the appropriate level (Auto-pack: packs items into containers, or Auto-pack Master: packs items into containers then packs those containers onto a master container such as a pallet or export container) from the list of values. This field is required.
 - Auto Pack Batch Prefix: Define a batch prefix to uniquely identify your request. Although this field is free form, it is required.
 - Organization: Optionally, select the organization.
 - Pick Release Batch: Optionally, select the Pick Release Batch name that contains the deliveries that you are packing.
 - Delivery Name (Low): Optionally, select the low end of delivery names, if you choose to auto pack based on a range of delivery names.
 - Delivery Name (High): Optionally, select the high end of delivery names, if you choose to auto pack based on a range of delivery names.

- Bill of Lading (Low): Optionally, select the low end of bill of ladings, if you choose to auto pack based on a range of bill of ladings.
- Bill of Lading (High): Optionally, select the high end of bill of ladings, if you choose to auto pack based on a range of bill of ladings.
- Planned: Optionally, select Yes/No to indicate whether the deliveries scheduled for automated packing are planned.
- Ship From Location: Optionally, select a ship from location.
- Ship To Location: Optionally, select a ship to location.
- Intermediate Ship To Location: Optionally, select an intermediate ship to location.
- Pooled Ship To Location: Optionally, select a pooled ship to location.
- Consignee/Customer Name: Optionally, select a consignee or customer name.
- Ship Method: Optionally, select a ship method.
- FOB: Optionally, select FOB terms.
- Freight Terms: Optionally, select freight terms.
- Pick-up Date (Low): Optionally, select the low end of a pick up date.
- Pick-up Date (High): Optionally, select the high end of a pick up date.
- Drop-off Date (Low): Optionally, select the low end of a drop off date.
- Drop-off Date (High): Optionally, select the high end of a drop off date.
- Log Level: Optionally, select log level for this run. This determines whether a debug file is created. Select zero for no debugging log, or one to create a debugging log.

Figure 5–5 Auto-Pack Deliveries SRS Window



3. Select OK.

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, and allows for changes.

Prerequisites

- Delivery must be Packed.
- Delivery cannot be in Planned status.
- Delivery cannot be ship confirmed.

To unpack a delivery:

1. Navigate to the [Shipping Transactions](#) window and find the Delivery you want to unpack.
2. From the Actions menu, choose Unpack.
3. Click Go to unpack the delivery.
4. Save your work.

Calculating Weight and Volume for a Delivery

The weight and volume of a delivery can be automatically calculated or manually entered. The default setting is set up in the Weight/Volume Calculation field in the Shipping Parameters window:

- If you select Automatic, the weight and volume is always calculated automatically at ship confirm based on values defined as the physical attributes in the Master Item window. The automatic calculation of weight and volume includes the fill percentage. Any weight/volume value manually entered is overwritten when ship confirm is initiated.
- If you select manual, the weight/volume values entered in the delivery will be used for ship confirm.

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

- Calculates the weight, volume, and fill percentage of each open delivery and adds the values to the delivery'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.

Prerequisites

All delivery lines must be assigned to deliveries.

Delivery status must be set to Open.

To automatically calculate weight and volume for a delivery:

If you selected Automatic in the Weight/Volume Calculation field in the Shipping Parameters window, the weight and volume is calculated automatically at ship confirm. See Shipping Execution Setup, Defining Shipping Transaction Parameters in *Oracle Order Management Suite Implementation Manual*.

To manually enter weight and volume for a delivery:

1. Navigate to the [Query Manager](#) window, and find the delivery.
The delivery displays in the Shipping Transactions window.
2. Select Details.
3. Enter your weights and volume.
4. Save your work.

Note: If Oracle Transportation is enabled, the calculation of weight and volume will affect the load tendering calculation within Oracle Transportation. For more information, refer to the *Oracle Transportation User's Guide*.

Generating a Loading Sequence for Delivery Lines in a Delivery

The loading sequence defines the order in which the delivery lines are loaded into containers. 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 applies to the lowest level of packing (loading). For example, if a Detail container is specified for a delivery line, the loading sequence determines the order the item is loaded into the container. If a container is not specified, the loading sequence determines the order an item is placed in a vehicle.

If an item is loaded into a container first and then into a vehicle, a loading sequence of the items can only be reviewed through the vehicle load sheet. The vehicle load sheet prints the loading sequence in the correct order.

Prerequisites

The status of the delivery must be open.

The Lines Loading field (located on the Delivery tab of the Delivery Detail window) must be defined for the delivery. The Customer Production Sequence field (located in the Contents 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 delivery lines in a delivery:

1. Navigate to the [Delivery](#) window.
2. Select the lines loading order to determine the order the delivery lines are placed in containers.
3. Click Done.
4. In the Deliveries tab, select Generate Loading Sequence from the Actions menu to generate a loading sequence for the delivery lines in the delivery.
5. Click Go.
6. Save your work.

Example of Loading Sequence Generation

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

Table 5–2 *Delivery Lines for Loading Sequence*

Production Sequence Number	Delivery Line
22	1

Table 5–2 Delivery Lines for Loading Sequence

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

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

Table 5–3 Loading Sequence

Loading Order	Container 1	Container 1	Container 2	Container 2	Container 3	Container 3
Forward	1	2	3	4	5	6
Reverse	6	5	4	3	2	1
Forward Invert	2	1	4	3	6	5
Reverse Invert	5	6	3	4	1	2
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. These document sets can include pick release documents, all shipping documents, and packing slip information.

To print a document set for a delivery:

1. Navigate to the [Query Manager](#) window, and find the delivery.
The delivery displays in the Shipping Transactions window.
2. From the Actions menu, select Print Document Set.
3. Click Go.

The Document Sets window displays a list of document sets.

4. Select the document set and click OK.
The document set for the delivery is printed.
5. Save your work.

Assigning Deliveries to a Trip

You can create a new delivery and assign it to a trip, or assign an existing delivery to a trip. You can assign deliveries to an existing in-transit trip provided that the stops selected for the assignment are in Open or Arrived status.

Note for advanced transportation planners: When a delivery is manually or automatically assigned to a trip, the Shipping Transactions window creates a delivery leg. If a trip for the delivery is created during ship confirmation, a delivery leg is created using the sourcing warehouse as the initial pick-up and the ultimate destination as the drop off.

Prerequisites

Status for the trip must be Open.

Status for the Delivery must be Open.

To assign a delivery to a trip:

1. Navigate to the [Query Manager](#) window, and find the delivery.
The delivery displays in the Shipping Transactions window.
2. From the Actions menu, select Assign to Trip to display the Assign Deliveries to Trip window. You can enter the information about the trip to which you want to assign the delivery.

Figure 5–6 Assign Deliveries to Trip Window

The screenshot shows a dialog box titled "Assign Deliveries to Trip". At the top, there is a "Trip" field containing the value "11664". Below this, there are two main sections: "Pick-up Stop" and "Drop-off Stop". Each section contains a "New" checkbox, a "Location" text box, and three date/sequence number text boxes: "Planned Arrival Date", "Planned Departure Date", and "Stop Sequence Number". At the bottom of the dialog are "OK" and "Cancel" buttons.

3. Select the trip name that you want the delivery assigned to.

Note: Alternately, for quickly assigning a delivery to a trip, you can select a trip and click OK. The delivery's initial pick-up and ultimate drop-off default values are used.

You can add a new pick-up and drop-off stop for the delivery, or alternately, select an existing pick-up and drop-off stop associated with the trip.

- To assign the delivery to a new stop: In the Pick-up Stop region, enable the New box if you want to add a new pick-up stop. In the Drop-off region, enable the New box if you want to add a new drop-off stop. Select the location, arrival date, and departure date for each stop.

Note: You can assign deliveries to stops that are in Open or Arrived status. You cannot assign deliveries to stops that are in Closed status.

- Alternately, to assign the delivery to an existing stop: Select the location for the pick-up stop and the drop-off stop. The default departure and arrival dates for each stop location are automatically selected.
4. Click OK and save your work.

Assigning Freight Costs to a Delivery

You can assign freight costs to a specific delivery, or update existing freight costs. For example, if you want to add additional costs to a particular delivery of goods. Freight cost can also be assigned to a delivery detail, a container, or a trip.

Note: If you utilize Oracle Transportation, you can utilize the Action Get Freight Costs to generate your freight costs automatically. If this option is utilized, the Freight Costs window will be displayed with the freight costs populated.

If you select a ship method and invoke the action Get Freight Costs, and then realize that you have made a mistake you can undo your mistake and start over by selecting the action Cancel Ship Method. This action will nullify the ship method on the delivery and trip and will erase freight costs generated by Oracle Transportation's rating engine. However, any manually entered freight costs will remain in place. The action Cancel Ship Method is only available if Oracle Transportation is installed and you have the privilege within your defined role for Cancel Ship Method.

To assign freight costs to a delivery:

1. Navigate to the [Query Manager](#) and find the delivery.
2. From the Actions menu, select Assign Freight Costs and click Go.

Figure 5–7 Freight Costs Window

Delivery: Total Freight Cost:

Name	Type	Trip	Currency Code	Amount	Conversion Type	Corr

3. Enter, or select from the list of values, the Freight Cost Name.
4. Enter a Currency Code, or accept the default.
5. Enter an Amount, or accept the default.
6. Select a Conversion Type.
7. Click Done to save your work.

Note: Freight cost Name and freight cost Type uniquely identify a freight cost charge. If freight costs are manually entered, then the Trip field in the Freight Costs region is null.

The Order Management Interface concurrent process transfers the carrier freight costs to the sales order for invoicing if a price modifier is properly

defined to pass freight cost. For more information, refer to the *Oracle Order Management Suite Implementation Manual, Appendix H*.

Note: If Oracle Transportation is installed, you can automatically calculate the estimated carrier freight costs rather than entering them. Carrier freight costs are prorated to the delivery detail level. If changes occur to the delivery requiring the freight rate to be recalculated, a warning message will be displayed when viewing carrier freight costs. For more information, refer to the *Oracle Transportation User's Guide*.

Freight Rate Recalculation Actions

If you rated a delivery leg in Oracle Transportation but then made certain changes prior to ship confirming, a warning message will display, when you view the carrier freight costs, to advise that the costs shown are not current. You have two choices to recalculate the freight rate:

- Recalculate the rate within Oracle Transportation
- Ship confirm and close the pick up stop

Executing any of the following Actions, after you rated a delivery leg in Oracle Transportation, will change the freight costs and will require recalculation:

- Delivery
 - Assign to Trip
 - Unassign from Trip
 - Pack
 - Unpack
- Delivery Detail
 - Assign to Delivery
 - Unassign from Delivery
 - Pack
 - Unpack
 - Split
- Trip

- Change Consolidation flag within Trip window
- LPN (Container)
 - Assign Delivery Detail to
 - Unassign Delivery Detail from
 - Change weight or volume
- Sales Order
 - Cancel line
 - Change ordered quantity
 - Change organization and warehouse

To view freight costs:

1. Navigate to the [Query Manager](#) window and find the delivery.
2. In the Actions menu, select Assign Freight Costs and click Go.
3. View the freight cost information as needed.

Note: If Oracle Transportation is installed, freight costs for the delivery can be viewed by selecting the Action Assign Freight Costs within the Shipping Transactions window. The Freight Costs region will display the delivery name, freight cost name, freight cost type, and amount.

Oracle Transportation generated freight cost name and type records are view only.

There are four freight cost types specifically seeded for Oracle Transportation including: Transportation Charge, Transportation Rate, Transportation Discount, and Transportation Summary.

Reference the topic [To assign freight costs to a delivery](#) on page 5-27 for information on the Freight Costs fields.

Unassigning a Delivery from a Trip

You can unassign a delivery from a trip. For example, if you wanted to reassign a delivery that was already assigned to a trip, you could reassign it from one trip and assign it to another.

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 find the delivery you want to unassign.
The delivery displays in the Shipping Transactions window.
2. From the Actions menu, select Unassign from Trip.
3. Click Go to unassign the delivery from the trip.
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 until it is re-opened.

To close a delivery:

1. Navigate to the [Query Manager](#) window, and find the delivery you want to close.
The delivery displays in the Shipping Transactions window.
2. From the Actions menu, select Close.
3. Click Go to change the status of the delivery to Closed.
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. To make changes to a planned delivery, you must unplan it first and then make the required 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 find the delivery.
The delivery displays in the Shipping Transactions window.
2. From the Actions menu, select Plan.
3. Click Go.
4. Save your work.

See

[Unplanning a Delivery](#) on page 5-32.

Unplanning a Delivery

You can unplan a delivery to unassign delivery lines. When you unplan a delivery, Shipping Execution:

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

Note: All delivery lines remain assigned 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 find the delivery.
The delivery displays in the Shipping Transactions window.
2. From the Actions menu, select Unplan.
3. Click Go to unplan the delivery.
4. Save your work.

Reopening a Delivery

You can reopen 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 must not be Closed.

To re-open a delivery:

1. Navigate to the [Query Manager](#) window, and find the delivery.
The delivery displays in the Shipping Transactions window.
2. From the Actions menu, select Re-open.
3. Click Go.
4. Save your work.

One Step Shipping

One step shipping is the process of picking, optionally packing, and shipping delivery lines in one step. Utilizing the Actions named Pick and Ship, and Pick, Pack, and Ship, within the Shipping Transactions window, Deliveries tab and Delivery Lines tab, enables this functionality. The two actions can be utilized depending on your business needs.

- **Pick and Ship:** This action can be used for one or more deliveries or delivery lines. Pick and Ship will perform the following:
 - Auto create deliveries if deliveries are not associated with all or some of the lines.

- Launch Pick Release and pick confirm all lines assigned to the deliveries (auto-created as well as manually created.)
- Ship confirm all deliveries if all assigned lines have a line status of Staged/Pick Confirmed and do not require any additional actions such as serial numbers or other inventory controls. Pick and Ship utilizes the following ship confirm options:

Actual Departure Date: System date

Note: The ship confirm options are used from the default auto ship confirm rule specified in the shipping parameter for the organization.

Create Bill of Lading: Yes

- Auto create trips if manually created trips/stops are not associated with any or all of the deliveries
- Close auto created or manually created trips
- Perform all other shipping functions that are performed during ship confirm and trip closing, for example executing interfaces

Note: If as part of Pick and Ship process, all delivery lines of a delivery cannot be released resulting in a status of staged/pick confirmed, the entire delivery will not be ship confirmed as part of the automated process.

Deliveries that require additional input from you, such as inventory controls, will not be ship confirmed.

- Pick, Pack, and Ship: This action can be used for one or more deliveries or delivery lines. Pick, Pack, and Ship will perform the following:

Note: For Pack to occur, you must setup a container-item relationship between the delivery lines item and the container item. For packing items into containers, then containers into containers, you must setup container-item relationships from container to container. For more information on container-item relationships, refer to the *Oracle Order Management Suite Implementation Manual, Appendix K*.

- Auto create deliveries if deliveries are not associated with all or some of the lines.
- Launch Pick Release and pick confirm all lines assigned to the deliveries (auto-created as well as manually created.)
- Auto pack all delivery lines with a status of Staged/Pick Confirmed, and all deliveries with a status of Open.
- Ship confirm all deliveries that have all line status of Staged and do not require any additional actions such as serial numbers. Pick, Pack, and Ship utilizes the following ship confirm options:

Actual Departure Date: System date

Note: The ship confirm options are used from the default auto ship confirm rule specified in the shipping parameter for the organization.

Defer Interface: No

- Auto create trips if manually created trips/stops are not associated with any or all of the deliveries
- Close auto created or manually created trips
- Perform all other shipping functions that are performed during ship confirm and trip closing, for example executing interfaces

Note: If as part of Pick and Ship process, all the delivery lines of a delivery cannot be released resulting in a status of staged/pick confirmed, the entire delivery will not be ship confirmed as part of the automated process.

Delivery details that require additional information, such as inventory controls, from you will not be ship confirmed.

Managing Delivery Lines

Topics covered in this chapter include the following:

- [Overview of Delivery Lines](#) on page 6-2
- [Viewing the Status of a Delivery Line](#) on page 6-4
- [Splitting Delivery Lines](#) on page 6-8
- [Transferring Delivery Lines to Cycle Counting](#) on page 6-10
- [Assigning Delivery Lines to a Delivery](#) on page 6-12
- [Unassigning Delivery Lines from a Delivery](#) on page 6-13
- [Auto-creating Deliveries for Delivery Lines](#) on page 6-14
- [Auto-creating a Trip for Delivery Lines](#) on page 6-15
- [Assigning Freight Costs to Delivery Lines](#) on page 6-16
- [Calculating Weight and Volume for Delivery Lines](#) on page 6-17
- [Pick Releasing Delivery Lines](#) on page 6-18
- [Managing Sales Order Changes](#) on page 6-19

Overview of Delivery Lines

A booked order line that is eligible to be shipped can be viewed as a delivery line in the Shipping Transactions window. Delivery lines with common attributes such as Ship From and Ship To addresses can be grouped together as a delivery. Delivery lines from different sales orders can be grouped together as a single delivery.

You can manage the following tasks for delivery lines:

- [View status of a delivery line](#)
- [Split delivery lines](#)
- [Transfer delivery lines to cycle counting](#)
- [Assign delivery lines to a delivery](#)
- [Unassign delivery lines from a delivery](#)
- [Auto-create deliveries for delivery lines](#)
- [Auto-create a trip for delivery lines](#)
- [Assign freight costs to delivery lines](#)
- [Calculate weight and volume for delivery lines](#)
- [Pick release delivery lines](#)
- [Manage sales order changes](#)

Note: If you utilize Oracle Transportation, compatibility constraints can be used in the shipping process up through ship confirmation.

Compatibility Constraints enable you to define a variety of transportation related restrictions related to items (goods for shipment), carriers, modes of transport, facilities, organizations, and customers. Then, these restrictions are used by the application to warn or prevent further order processing if the defined undesirable condition is encountered. For example, you can define an item-carrier compatibility constraint stating that designated carriers cannot transport specific inventory items. When a delivery is created violating the constraint, an error or warning message will be generated. You determine the severity of the constraint violation; whether a warning or error should display.

For more information, refer to the *Oracle Transportation User's Guide*.

Note: The Line/LPN, Inventory Details, and Source regions on the Line window include dual unit of measure, grade, and lot or subplot process fields. If the OPM item is dual UOM controlled, lot or subplot controlled, and has a grade, then you will see values in these fields. Otherwise, these fields will be blank. Refer to *Using Oracle Order Management with Process Inventory* for description of process fields.

Viewing the Status of a Delivery Line

The released status of a delivery line identifies its progress through the shipping process. View released status in the:

- Oracle Shipping Execution Shipping Transactions window
- Oracle Order Management Orders window, Actions button, Additional information, Deliveries tabbed region

Not Applicable (Code X)

The delivery line is invoicable but non-shippable, for example, a service line or a warranty line.

Not Ready to Release (Code N)

The delivery line is not eligible for pick release.

Occurs when the order line is manually imported into Oracle Shipping Execution using the Import Delivery Line concurrent process. It has not reached the Awaiting Shipping workflow activity. It is not scheduled and has no reservations.

Ready to Release (Code R)

The delivery line is eligible for pick release.

Occurs when the order line has reached the Awaiting Shipping workflow activity (it is booked, scheduled, and in Oracle Shipping Execution).

Note: Only lines that are in Ready to Release status will be considered for Pick and Ship and Pick Pack and Ship processes.

Released to Warehouse (Code S)

Pick release has processed the delivery line and has:

- Created move order headers and lines.
- Found available quantity and created inventory allocations.
- Not pick confirmed. If you are using auto-pick confirm, it changes release status to Staged/Pick Confirmed. If you are not using auto-pick confirm and want to progress the delivery lines, navigate to Oracle Inventory Move Order Transaction window and perform manual pick confirm.

Staged/Pick Confirmed (Code Y)

The delivery line is pick confirmed; inventory is transferred from storage sub inventory to staging sub inventory. Oracle Order Management shows the status as Picked.

It remains staged until ship confirm.

Back ordered (Code B)

Any of the following circumstances will cause this delivery line status to occur:

- Pick release has processed the delivery line and cannot find the entire quantity.
This typically occurs when the Oracle Inventory inventory balance indicates that there is not enough material (either because there is not enough material or because the inventory balance is incorrect).
- At ship confirm, you:
 - Enter Shipped Quantity that is less than Original Requested Quantity
 - Back order the entire delivery quantity
 - Transfer a reservation to cycle count

This typically occurs when the material that you want to ship:

- Has become unavailable, for example, damaged between picking and shipping.
- Is available and you back order material for specific business reasons. For example, all available material has been allocated to a specific customer when you find out additional supply for other orders will be delayed.

For information on the back order processing in pick release and ship confirm, see those topics.

Shipped (Code C)

The delivery line is ship confirmed and posted as intransit.

Interfaced (Code I)

Delivery sourced from Oracle Order Management: The delivery line is shipped and the OM Interface and Inventory Interface concurrent processes have completed.

Delivery sourced from all other Oracle Applications: The delivery line is shipped and the Inventory Interface concurrent process has completed.

Cancelled (Code D)

The sales order line that the delivery line it supports is cancelled.

To view the status of a delivery line:

1. Navigate to the [Query Manager](#) window, and find the delivery lines.
The delivery lines display in the Shipping Transactions window.
2. Select the line and click Detail to display the line details.
In the Line Status field, the current status of the delivery line is displayed.
3. Click Done to return to the Main tab.
4. Alternately, in the Main tab, you can use the right scroll arrow to scroll to the Line Status column and view the status of the delivery line(s).
5. If the delivery line is for a contract deliverable from Oracle Project Contracts:
 - Navigate Special > Show Contract Details....
 - View the contract details on the web page that displays.

Figure 6-1 Project Contracts Screen - View a Contract

ORACLE
Project Contracts

[Return to Portal](#) [Logout](#) [Preferences](#) [Help](#)

View a Contract

Contract Number SA-010402-1

Header Information

Contract Number	SA-010402-1	Contract Type	Award
Contract Status	Entered	Description	

System Attributes

Customer Quality Acceptance Required?	Yes	Export Required?	Yes
Prime Contract Alias	PC	Prime Contract Number	PC0987650

Terms & Conditions

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Name	Value
Outbound FOB	Destination

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Splitting Delivery Lines

You can split shipments for certain customer requirements. For example, an original shipment may need to be split if your customer wants part of the ordered quantity delivered on a different date or to a different location. 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 quantity can progress further through the Order process.

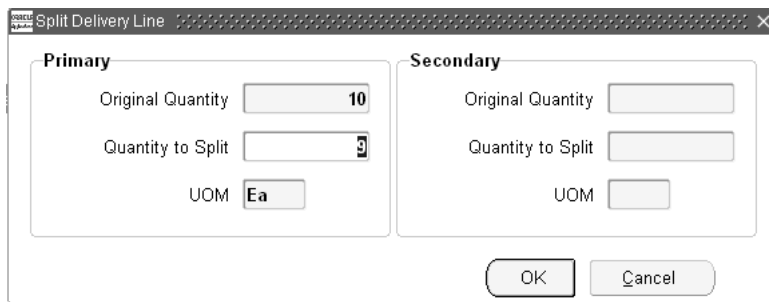
To split delivery lines:

1. Navigate to the [Query Manager](#) window, and find 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 Go and the Split Delivery Line window displays. Original Quantity displays the line quantity.

Figure 6–2 Split Delivery Line Window



Primary	Secondary
Original Quantity: 10	Original Quantity:
Quantity to Split: 3	Quantity to Split:
UOM: Ea	UOM:

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 OK.

The delivery lines are split into two lines.

7. Save your work.

Transferring Delivery Lines to Cycle Counting

You can transfer delivery lines to cycle counting to manage inventory discrepancies caused by, for example, miscounting.

If you back order an inventory discrepancy, the back order removes the reservation so that the quantity of the back order remains available until you perform an inventory adjustment to correct it. The unavailable item could be pick released again before you perform the inventory adjustment transaction, unnecessarily sending pickers to retrieve it.

However, if the unavailable quantity is in cycle counting, it is not available for pick release and the inventory control staff can straighten out the discrepancy on the next cycle count.

By specifying a quantity in the Shipping Transactions form, you create a back order for the entire quantity or for a partial quantity of the delivery line. The Shipping Transactions form transfers the reservation for the back ordered quantity to cycle counting.

For example, you are processing a staged delivery line with quantity 10. If you use the transfer cycle count functionality with this delivery line and specify two, the transfer cycle count functionality:

- Splits the delivery line into two delivery lines, one with quantity eight and one with quantity two.
- Leaves the delivery line with quantity eight as a staged delivery.
- Back orders the delivery line with quantity two and transfers its reservation to cycle counting.

If you use the transfer cycle count functionality with this delivery line and specify 10, the transfer cycle count functionality back orders the entire delivery line and transfers its reservation to cycle counting.

To use this functionality, you must have security privilege Cycle Count Delivery Line. This security privilege appears on the Shipping Execution Role Definition form, Lines/LPNs tabbed region.

To view the reservation, use the Oracle Inventory Item Reservations form. Query the reservations for the organization and item number of the delivery and select the demand source as Cycle Count. The connection between the delivery line and the reservation is the item number.

You can also transfer delivery quantities to cycle counting during ship confirm by specifying:

- Cycle count the entire quantity
- Cycle count unspecified quantities

To transfer delivery lines to cycle counting:

1. Navigate to the [Query Manager](#) window, and find the delivery line that you want to transfer to cycle counting.

The delivery line displays in the Shipping Transactions window, Lines/LPNs tabbed region.

2. In Actions, select Cycle Count and click Go.

The Transfer to Cycle Count window displays.

Figure 6–3 Transfer to Cycle Count Window

3. In the Primary region:
 - In Original Quantity and UOM, verify the delivery line quantity and item unit of measure
 - In Quantity to Cycle Count, enter the quantity that you want transferred to cycle counting.
4. The Secondary region is used by Oracle Process Manufacturing.
5. Click OK.
6. Save your work.

Assigning Delivery Lines to a Delivery

You can assign delivery lines to an existing delivery.

For delivery lines with intermediate ship-to locations:

- You cannot assign a delivery line with an intermediate ship-to to a delivery that has a line without an intermediate ship-to.
- You can assign multiple delivery lines with the same intermediate ship-to values to the same delivery.
- You cannot assign multiple delivery lines with different intermediate ship-to values to the same 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 find 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. Click Go to display the Deliveries window.
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.

Prerequisites

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 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.

Note: Any changes in Sales Order that cause a delivery line to be unassigned from a delivery will not trigger weight/volume calculation at the trip level as required for Load Tender. You must manually calculate weight/volume for the delivery.

When a line is unassigned from a delivery within the Shipping Transaction window, the weight/volume calculation at trip level is triggered.

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 specified 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 find 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 Go.

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 that have not been assigned to an existing delivery or trip. 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 find 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. Select Go.

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 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.

If you want to pass freight costs entered in the Shipping Transactions window to Oracle Order Management for invoicing, then you have to set up a pricing modifier. Refer to the latest version of *Oracle Order Management Suite Implementation Guide* for more information about Freight and Special Charges.

To assign freight costs to delivery lines:

1. Navigate to the [Query Manager](#) window, and find the delivery lines.

The delivery lines display in the Shipping Transactions window.

2. From the Actions menu, select Assign Freight Costs to manually assign your freight costs.
3. Click Go.

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

4. Enter the Name, Type, Currency Code, Amount, and Conversion Type, and Creation Date.
5. Click Done.

At ship confirmation, the freight cost is applied. If a pricing modifier was setup, then the information is transferred to Oracle 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.

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 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. Click Go.

The weight and volume are calculated for the selected delivery lines.

5. Save your work.

Note: If Oracle Transportation is enabled, the calculation of weight and volume will affect the load tendering calculation within Oracle Transportation. For more information, refer to the *Oracle Transportation User's Guide*.

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 find 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 Go.

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

See

[Overview of Pick Release](#) on page 8-2.

Managing Sales Order Changes

Changes to sales orders affect Oracle Shipping Execution if the order is booked. Since delivery details exist, they must remain coordinated with the sales order lines.

Oracle Shipping Execution evaluates the delivery details every time there are any of the following sales order line updates:

- Split
- Change quantity
- Change schedule
- Change schedule date
- Change ship set
- Change delivery group

In general, Oracle Shipping Execution honors sales order line changes as long as their delivery lines are not:

- Shipped or in a confirmed delivery
- In WMS organizations and require unpacking or unassignment from delivery

The OM Interface process splits reservations for shipped and unshipped lines and executes first in the Interface Trip Stop process. Therefore, shipments can be confirmed and order lines passed to Oracle Receivables independently of the Inventory Interface processing, enabling you to invoice sales orders as soon as they are shipped.

Split

Oracle Shipping Execution performs as follows during an order line split:

- Disallows the order line to split if any delivery line is shipped or in a confirmed delivery.
- Sequence the delivery details by their released status in the order Shipped, Staged/Pick Confirmed, Ready to Release, Not Ready to Release, Back ordered, Released to warehouse and attempt to fulfill the sales order split line quantity by using them one-by-one.
 - If an existing delivery line Requested Quantity can fulfill or partially fulfill the remaining split order line quantity, assign the delivery line the split sales order line quantity.

- If an existing delivery line Requested Quantity is too large to fulfill the split order line quantity, the split the delivery and assign the split delivery to the split order line. Carry serial numbers with the split delivery details.
- Retain reservations with inventory controls; randomly assign the others to the new delivery details.
- Change delivery lines with status Released to Warehouse to status Ready to Release, cancel their move order lines, and recreate reservations for them.

Change Quantity

Oracle Shipping Execution performs as follows during an order line change quantity. Change quantity is a change in the ordered quantity:

- Sequence the delivery details by packed status in the order Not packed, Packed.
- Then, sequence the delivery details by planned status in the order Unplanned, Planned.
- Then, sequence the delivery details by released status in the order Ready to release, Not applicable, Back ordered, Released to warehouse, Staged/Pick Confirmed.

Increased quantity

- Attempt to increase the delivery detail Requested Quantity of the first delivery detail. For this to succeed, the detail must be unassigned or the delivery must be open, the delivery line must not be packed in a container, and released status must be Not ready to be released, Ready to be released, or Non-transactable.
- Otherwise, create a new delivery detail.
- Do not modify reservations. You can create a manual reservation for the quantity.

Note: If the order line quantity is increased, you will have to manually create the extra reservations.

Decreased quantity

- Decrease the Requested Quantity of delivery details one-by-one but skip delivery details with delivery status Confirmed, Closed, In transit.
- Refuse the reduction if there are not enough eligible lines to meet the decreased quantity.

- Reduce or delete move order lines associated with lines of released status Released to Warehouse. You cannot overpick the move order line in excess of the original allocated quantity.
- If the delivery line released status is Released to Warehouse, Oracle Inventory adjusts reservation quantity during pick confirm. For all other delivery line released statuses, Oracle Shipping Execution reduces the reservation quantity.
- Logs an exception for any lines that are staged, part of a planned delivery, or packed inside a container.

Note: If the order line quantity is decreased, you will have to manually change the reservation.

Change Schedule

Change schedule is a change in ship-from organization, a change in sub inventory, or unscheduling a line.

Subinventory

Oracle Shipping Execution performs as follows during a sub inventory change:

- Changes sub inventory if status is Not ready to release or Ready to release.
- Does not change sub inventory if status is Released to Warehouse or Staged/Pick Confirmed. Pick confirm can change the sub inventory.

Ship-from organization and unscheduling

Oracle Shipping Execution performs as follows during a ship-from organization and unscheduling change:

- No allocations
 - Delete the move order line.
 - Set the status to Ready to release.
- Allocations created, not pick confirmed
 - Cancel the move order line.
 - Clear the inventory control information. Leave sub inventory information if delivery detail is Released to Warehouse or Staged/Pick Confirmed.
 - Delete and recreate the reservation.

- Set the status to Ready to release.
- Pick confirmation complete
 - Clear the inventory control information. Leave sub inventory information if delivery detail is Released to warehouse or Staged/Pick Confirmed.
 - Delete and recreate the reservation.
 - Set the status to Ready to release.
 - Log an exception.
 - Unassign from container and delivery.

Change Scheduled Date

Oracle Shipping Execution performs as follows during an order line change scheduled date. Change scheduled date is a change in the date scheduled:

- Change the date.
- Log an exception if the new scheduled date is after the original scheduled date.

Change Ship Set

Oracle Shipping Execution performs as follows during an order line change ship set. Change ship set is a changed ship set name:

- If there is no current ship set, assign the ship set to the delivery lines.
- If there is a current ship set, change the ship set on the delivery line if the status is Not Ready to Release, Ready to Release, Released to Warehouse (without allocations), or Staged/Pick Confirmed. If the status is Released to warehouse (without allocations), change the ship set on the move order also.
- If the status is Released to warehouse and there are allocations, refer to the shipping parameter Enforce Ship Set at Picking. If ship sets are enforced, do not honor the change to the sales order line.

Change Delivery Group

Oracle Shipping Execution performs as follows during an order line change delivery group. Change ship set is a changed ship-from organization, ship-to organization, intermediate ship-to organization, customer, freight terms, FOB, shipping method, or carrier:

- Check the shipping parameter grouping attributes.

- Change all values for the attributes that are mandatory or enforced.
- If the sales order line is assigned to a delivery or container, unassign the line from the delivery and log an exception.
- If none of the enforced or mandatory attributes are changed but customer, freight terms, FOB, or ship method is changed, log an exception for each packed delivery line.

Managing Containers

Topics covered in this chapter include the following:

- [Overview of Containers](#) on page 7-2
- [Auto-packing Delivery Lines into Containers](#) on page 7-4
- [Creating a Container](#) on page 7-7
- [Assigning Freight Costs to a Container](#) on page 7-10
- [Packing Workbench](#) on page 7-12
- [Using the Packing Calculator](#) on page 7-17
- [Manually Packing Delivery Lines into Containers](#) on page 7-19
- [Assigning Containers to a Delivery](#) on page 7-21
- [Unassigning Containers from a Delivery](#) on page 7-22

Overview of Containers

In the Shipping Transactions window, you can create and manage containers (LPNs) at any point in the shipping process. If you are using the Auto-packing feature, containers can be automatically packed using the container-item relationships set up in the Container-Item Relationships window.

Note: LPN is an acronym for License Plate Number. A packing container has a license plate number for unit identification and reporting capability, so containers are also called LPNs in Oracle Shipping Execution.

You can create containers without assigning them to a delivery. This is useful if you want to create multiple containers of the same type then pack them with unassigned delivery lines.

You can pack multiple containers with multiple lines using one of the following packing methods:

- [Auto-packing](#)
- [Packing Workbench](#)
 - Equal packing: splits the delivery lines equally between the selected LPNs. You cannot use this method with delivery lines of serial controlled items.
 - Sequential packing: fully packs one container at a time to its capacity (weight, volume, or quantity) before packing the next selected container.
- [Manual packing](#)
- [Packing calculator](#)

You can complete the following tasks in container management:

- [Create containers](#)
- [Assign freight costs](#)
- [Assign containers to deliveries](#)
- [Unassign containers from deliveries](#)

Note: If you utilize Oracle Transportation, compatibility constraints can be used in the shipping process up through ship confirmation.

Compatibility Constraints enable you to define a variety of transportation related restrictions related to items (goods for shipment), carriers, modes of transport, facilities, organizations, and customers. Then, these restrictions are used by the application to warn or prevent further order processing if the defined undesirable condition is encountered. For example, you can define an item-carrier compatibility constraint stating that designated carriers cannot transport specific inventory items. When a delivery is created violating the constraint, an error or warning message will be generated. You determine the severity of the constraint violation; whether a warning or error should display.

For more information, refer to the *Oracle Transportation User's Guide*.

Containers for Oracle Warehouse Management (WMS) enabled Organizations

The following container management conditions apply only if Oracle Warehouse Management system (WMS) is enabled at the warehouse organization:

- You must be in Warehouse Management to pack the contents before pick confirming or staging them. In Warehouse Management enabled organizations, Warehouse Management does the packing and passes the updated shipping information to Shipping Execution.
- If Oracle Warehouse Management is installed, you can only assign and unassign the top most container from a delivery. For example, if you have detail LPNs packed into a master container, you can only assign/unassign the master container not the detail container.

Auto-packing Delivery Lines into Containers

Auto-packing provides a convenient and quick way of automatically packing delivery lines into containers (LPNs). The delivery lines are packed into LPNs based on the container-item relationship set up in Oracle Shipping Execution or in Oracle Inventory (defined as a customer item). The container-item relationship defines the container that is used for packing the delivery lines. The default is Oracle Inventory if the container-item relationship is defined in both Shipping Execution and Oracle Inventory.

If multiple container-item relationships exist for the same item, the Preferred setting in the Container-Item Relationships window indicates the default container-item relationship used for that item.

If no container-item relationship is defined, you can select the container name in the delivery line or in the Delivery Detail window. The weight and volume allowances of the selected container are used to determine the number of required LPNs.

Using the Auto-pack Master Option

- If you select Auto-pack, then only the detail LPNs are created and packed.
- If you select Auto-pack Master, the delivery lines are packed into the detail container, and the detail containers are packed into the parent/master container in one action:

For example, a delivery line with a quantity of 12 of Item A has a container-load relationship set up so that 6 of Item A fits into Container A and 2 of Container A fits into Container B (the percent fill basis is set to quantity). If you run Auto-pack Master, the line is split into 2 lines of 6, the first line is packed into the first container, the second line is packed into the second container, and the two detail LPNs (2 Container As) are packed into Container B.

- The Auto-pack Master option is available from the Actions menu in the Lines/LPNs tab in the Shipping Transactions window. It is also available at the delivery level.

Note: If your organization has Oracle Warehouse Management enabled, see LPNs for Organizations with WMS.

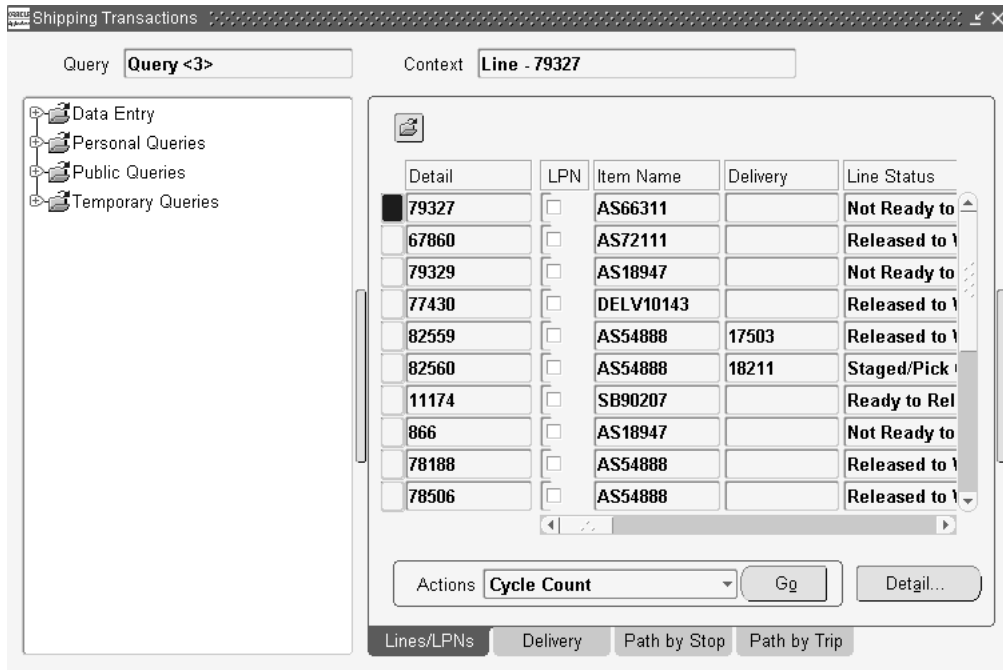
See

Shipping Execution Setup, Defining Freight Carrier Ship Method Relationships in *Oracle Order Management Suite Implementation Manual*

To autopack delivery lines into containers:

1. Navigate to the [Query Manager](#) window, and find the delivery lines.

Figure 7–1 Shipping Transactions Window - Lines/LPNs Tab



The delivery lines display in the Lines/LPNs tab of 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 Go.

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

5. Save your work.

Creating a Container

You can create multiple instances of an existing container type and assign them to trips or deliveries or use them in the future to pack delivery lines. This makes packing more flexible because you can plan and pack ahead of time or as needed. Once the container instances are created, they can be viewed in the Shipping Transactions window.

Delivery lines that have not been pick-released can be assigned to LPNs and packed. You can run a pick-release batch by container name which enables you to pack multiple LPNs with multiple lines in one transaction.

Naming Containers

In the Create LPNs window, you can assign names to identify and track individual LPNs in a delivery. You can either create your own container name, but if no name is created, the system generates default container names.

In the example below, ten container instances named VIS1001BOX and ending with VIS1010BOX are created.

Table 7–1 Container Example

Prefix	Base Number	Quantity	Suffix
VIS	1010	10	Box

Note: To define a new container type rather than create an instance of an existing container (LPN), see *Setting Up in Oracle Inventory*.

To create containers:

1. Navigate to the [Shipping Transactions](#) window, and find the Lines/LPNs. The Lines/LPNs display in the Shipping Transactions window.
2. From the Actions menu, select Create LPNs.
3. Click Go to display the Create LPNs window.

Figure 7–2 Create LPNs Window

The screenshot shows a 'Create LPNs' dialog box with the following fields and values:

- Organization: V1 (dropdown), Vision Operations (text)
- Container Item: BX54888 (text)
- Item Description: Box for AS54888 (qty 2) (text)
- Count: 10 (text)
- Name Generation section:
 - Name Prefix: VIS (text)
 - Base Number: 100 (text)
 - Pad to Width: 3 (text)
 - Name Suffix: BOX (text)
- Buttons: OK, Cancel

4. Select the organization for the container.
5. Select the container item such as a container, box, or pallet.
6. Enter a count for the number of container instances you want to create. For example, to create ten instances of the BX5488 Container, enter 10 in the Count field.
7. Enter a prefix for the container name.
8. Enter the base number for the container name.
 The numbering starts from the base number and increments by 1. For example, if you enter 100 as the base number for the first instance of a container, the second is numbered 101, the third 102 and so on.
9. The default Pad to Width is the total number of digits between the prefix and suffix. For example, the default Pad to Width for the container name VIS00100BOX is 3.
 You can override the default Pad to Width by entering a higher pad to width number. This allows for future creations of LPNs. For example, if you enter a Pad to Width of 5, the new container name is CNT00100V1.
10. Click OK to create the container instances.
11. Save your work.

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

Assigning Freight Costs to a Container

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

Prerequisites

A LPN must be created.

To assign freight costs for a container:

1. Navigate to the [Query Manager](#) window, and find the LPN.
The container displays in the Shipping Transactions window.
2. From the Actions menu, select Assign Freight Costs to manually assign your freight costs.

Note: If Oracle Transportation is enable in your organization, you can utilize the Action Get Freight Costs to generate your freight costs automatically. If this Oracle Transportation option is utilized, the Freight Costs window will be displayed with the freight costs populated.

3. Click Go to display the Freight Costs window. In this window, you can enter freight costs for the LPN.

Packing Workbench

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

The packing workbench window consists of the LPNs tab which displays the LPNs and the Lines tab which displays the delivery lines. The packing workbench displays the tare or filled weight and volume of LPNs and delivery lines that can help you determine the number of delivery lines and LPNs.

Figure 7–4 Packing Workbench Window

The screenshot shows the Packing Workbench window with the LPNs tab selected. The main area displays a table with the following data:

Pack	Sequence	LPN Name	Item Name
<input checked="" type="checkbox"/>	10	UPG-59141	Box01
<input checked="" type="checkbox"/>	20	UPG-59141	Box01
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Below the table, the Contents section is active, showing a table with the following data:

Detail	LPN	Item Name	Qu:
	<input checked="" type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		
	<input type="checkbox"/>		

The left sidebar contains the following sections:

- Available Capacity:** Weight 0 Lbs, Volume 0 FT3, Number of Containers 1.
- Item Total:** Weight, Volume, Number of Lines.
- Packing Mode:** Equal (Split % 100), Fyll (selected).

Buttons for Cancel and Pack are located at the bottom right of the window.

The LPNs and lines multi-record displays have check boxes next to each record to indicate whether a particular container or line has been selected for packing. As the LPNs are selected/deselected, the total available weight/volume is recalculated. Similarly 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 LPNs, you can determine whether you can pack the selected delivery lines in the available number of LPNs. Matching weights and volume does not guarantee that all the selected lines will be packed into the selected LPNs. Due to incompatibilities or differences in grouping attributes of the different lines and LPNs, there could be lines that remain unpacked at the end of the packing operation.

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

The following process-enabled fields are available on the Packing Workbench window if you are using Order Management with Process Inventory. If the item specified on the delivery line is dual controlled, and lot or subplot controlled, then you will see values in these fields. Otherwise, these fields will be blank. The process-enabled fields are display only and include the following:

- Secondary Quantity: Displays the quantity to be shipped in the secondary UOM
- UOM: Displays the secondary UOM for the item for the delivery line
- Sublot: Displays the subplot from which the delivery line was picked

Equal Packing Delivery Lines into Containers

You can split the delivery lines equally between the selected LPNs 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) that are grouped together at shipment time: for example, packing different home computer components into one box for shipping purposes. You cannot use this method with delivery lines of serial controlled items.

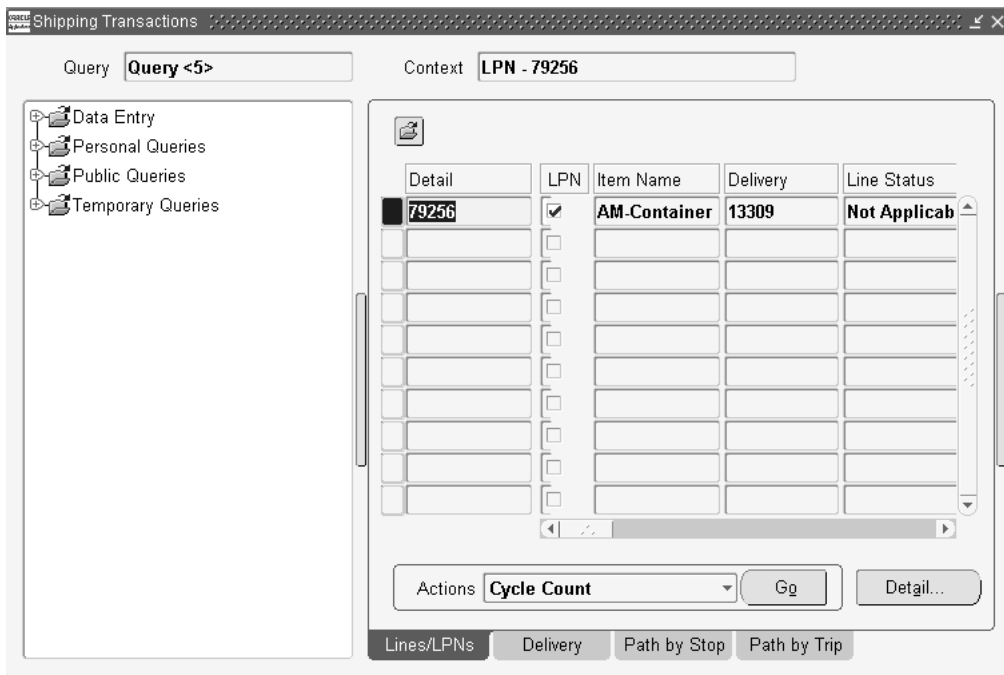
A selected delivery line is split equally by the number of LPNs and every line is packed into all the LPNs in a one to many relationship, provided the container grouping attributes are satisfied by the line. The preferred container specified on the delivery line or the container load-relationship is ignored. This method of packing could result in a gross over-packing or under-packing. If the LPNs 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 LPNs.

Note: If your organization has Oracle Warehouse Management enabled, see LPNs for Organizations with WMS.

To equally pack delivery lines into containers:

1. Navigate to the [Query Manager](#) window, and find the containers you want to pack.

Figure 7-5 Shipping Transactions Window - Lines/LPNs Tab



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

2. Select the delivery lines and LPNs. To select more than one, press and hold the CTRL key and select the lines and LPNs you want. To select multiple lines as a sequential group, place the cursor on the first line that you want and then press and control Shift and then select the last line in the sequential group.

Do not select delivery lines of serial controlled items.

3. From the Actions menu, select Packing Workbench.
4. Click Go.
5. In the Packing Mode region of the Packing Workbench window, choose Equal.
6. Click Pack.
7. Save your work.

Sequential Packing Delivery Lines into Containers

You can fully pack one LPN and then proceed to pack the next LPN. When packing multiple lines into multiple LPNs, 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 LPN 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 LPNs are full. If the LPNs are full before all the lines can be packed, the remaining lines are left unpacked. A warning will be issued to inform you that some lines were left unpacked.

Note: If your items split into decimal units at the time of packing and you do not want that, then you must change the setup for the master item. In the Master Item form, in the Physical Attributes tab, check OM Indivisible so that the item can only be packed in whole units. Save your work.

Note: If your organization has Oracle Warehouse Management enabled, see LPNs for Organizations with WMS.

To sequentially pack delivery lines into containers:

1. Navigate to the [Query Manager](#) window, and 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 Go.
The Packing Workbench window displays the LPN.
4. Select the Lines tab to display the lines.
5. Select the delivery lines you wish to pack into the LPNs.
6. In the Packing Mode region, choose Full.
7. Click Pack to pack the lines into the containers.
8. Save your work.

Using the Packing Calculator

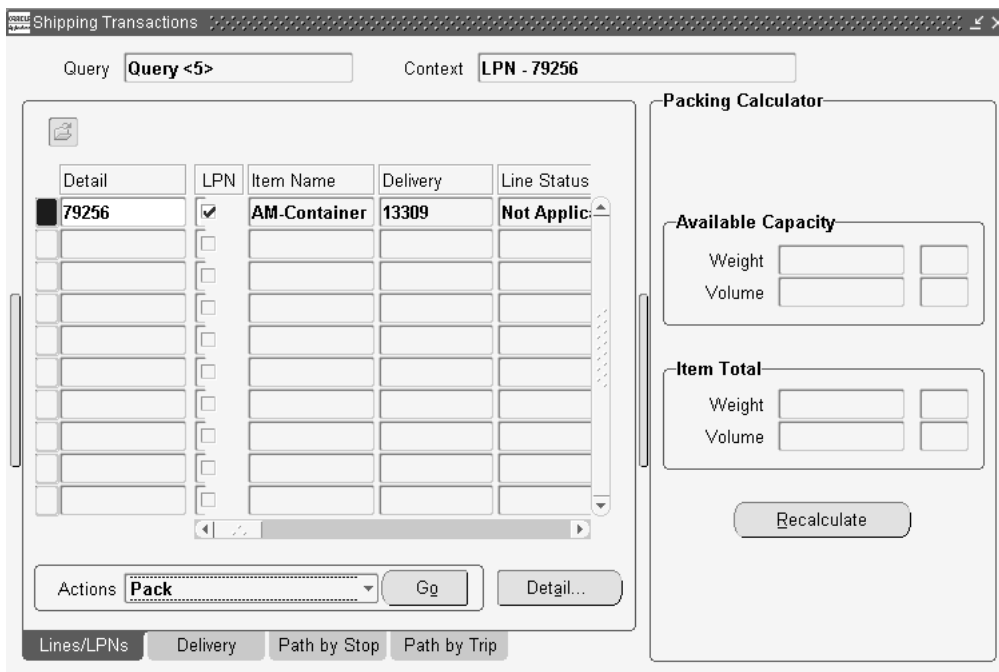
When using the Packing Workbench, you can use the Packing Calculator to help plan your packing requirements. The Packing Calculator uses the default weight and volume values for items and containers as defined in Oracle Inventory to determine if the delivery lines fit into the selected LPNs.

If you select or deselect lines or LPNs, you can recalculate the displayed values by choosing the Recalculate button

Note: If your organization has Oracle Warehouse Management enabled, see LPNs for Organizations with WMS.

To use the packing calculator:

1. Navigate to the [Shipping Transactions](#) window, and find the delivery lines and LPNs. Select the lines or LPNs.

Figure 7–6 Shipping Transactions Window - Packing Calculator

2. Choose the vertical bar located on the right side of the Shipping Transactions window to display the packing calculator.
3. Click Recalculate to display the available capacity of the LPNs or the weight and volume totals for the items.
4. Choose the bar again to close the Packing Calculator.

Manually Packing Delivery Lines into Containers

You can manually pack containers if you have delivery lines you want to pack without using the auto-pack method: for example, to quickly pack delivery lines into a box.

To manually pack containers:

1. Navigate to the [Shipping Transactions](#) window, and find the delivery line(s) you want to pack.
2. Select a line.
3. From the Actions menu, select Create LPNs.
4. Click Go to display the Create LPNs window. In this window, you can create the number of container instances you need for packing the delivery lines.

Figure 7–7 Create LPNs Window

The screenshot shows a window titled "Create LPNs" with the following fields and values:

- Organization: **V1** (dropdown menu showing "Vision Operations")
- Container Item: **BX54888**
- Item Description: **Box for AS54888 (qty 2)**
- Count: **10**

Below these fields is a section titled "Name Generation" with the following fields and values:

- Name Prefix: **VIS**
- Base Number: **100**
- Pad to Width: **3**
- Name Suffix: **BOX**

At the bottom of the window are "OK" and "Cancel" buttons.

5. Select the organization.
6. Select the container item such as a container, box, or pallet.
7. Enter a count for the number of container instances you want to create. For example, to create ten instances of the BX54888 Container, enter 10 in the Count field.

8. Enter a prefix for the container name.
9. Enter the base number for the container name.

The numbering starts from the base number and increments by 1. For example, if you enter 100 as the base number for the first instance of a container, the second is numbered 101, the third 102 and so on.
10. The default Pad to Width is the total number of digits between the prefix and suffix. For example, the default Pad to Width for the container name VIS100BOX is 3.

You can override the default Pad to Width by entering a higher pad to width number. This allows for future creations of LPNs. For example, if you enter a Pad to Width of 5, the new container name is VIS00100BOX.
11. Click OK to create the container instances and display them in the Shipping Transactions window.
12. Select the lines that you want to pack into the first container.
13. From the Actions menu, select Pack to display the Containers window.
14. In the Containers window, find the container that you created and click OK to pack the delivery lines into the container. You can only pack one container at a time.

Assigning Containers to a Delivery

You can assign an LPN (container) to an existing delivery by searching for the LPN and adding it to a delivery. If Oracle Warehouse Management System (WMS) is installed, you can only assign and unassign the topmost container to a delivery. For example, if you have detail LPNs packed into a master container, you can only assign the master container to a delivery.

Prerequisites

Delivery status must be set to Open.

A delivery and container must already be created.

Note: If your organization has Oracle Warehouse Management enabled, see LPNs for Organizations with WMS.

To assign a container to a delivery:

1. Navigate to the [Query Manager](#) window, and find the container(s).
The container(s) display in the Shipping Transactions window.
2. From the Actions menu, select Assign to Delivery.
3. Click Go to display the Deliveries window.
4. Select the Delivery to which you want to assign the LPN(s).
5. Click OK to assign the LPN(s) to the delivery.

Unassigning Containers from a Delivery

You can unassign an LPN (container) by searching for the LPN and unassigning it from a delivery. If Oracle Warehouse Management System (WMS) is installed, you can only assign and unassign the topmost container from a delivery. For example, if you have detail LPNs packed into a master container, you can only unassign the master container from a delivery.

Note: If your organization has Oracle Warehouse Management enabled, see LPNs for Organizations with WMS.

Prerequisites

Delivery status must be set to Open.

To unassign a container from a delivery:

1. Navigate to the [Query Manager](#) window, and find the LPN.
The LPN(s) displays in the Shipping Transactions window.
2. From the Actions menu, select Unassign from Delivery.
3. Click Go to unassign the container from the delivery.
4. Save your work.

Pick Release

Topics covered in this chapter include the following:

- [Overview of Pick Release](#) on page 8-2
- [Move Orders](#) on page 8-3
- [Releasing Sales Orders for Picking](#) on page 8-14
- [Pick Releasing from the Shipping Transactions Form](#) on page 8-18
- [Order Cancellations](#) on page 8-20

Overview of Pick Release

Pick Release finds and releases eligible delivery lines that meet the release criteria, and creates move orders. You can pick release by order, trip, stop, container, delivery, warehouse, customer, scheduled, or requested dates, shipment priority or combinations of the above criteria. The default release criteria is set up in Shipping Parameters, but you can override the default criteria in the Release Sales Order window at pick release.

The move orders create a reservation, determine the source, and transfer the inventory to staging areas. Pick Slips can be created after the detailing process completes, and the quantity and source can be manually verified at pick confirm. Detailing and pick confirmation can be manually transacted through inventory or set up in Shipping Parameters to occur automatically at pick release.

You can run one or more releases and customize release criteria to meet your requirements. You can define:

- Release Rules to specify your picking criteria through pick release parameters.
- Release Sequence Rules to specify the order in which eligible delivery lines are released during pick release.
- Pick Slip Grouping Rules to determine how released move order lines are grouped onto pick slips.

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. This is done in the Release Sales Orders for Picking window. This window can also be accessed from the Tools menu in the Shipping Transactions window.
- Concurrent: You can run pick release in the background, enabling you to run other processes simultaneously. This is done in the Release Sales Orders for Picking window. This window can also be accessed from the Tools menu in the Shipping Transactions window.
- 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. This is done in the Release Sales Orders for Picking SRS window.
- Shipping Transactions window: You can run pick release in the Shipping Transactions window by selecting Launch Pick Release from the Actions menu.

Note: If you utilize Oracle Transportation, compatibility constraints can be used in the shipping process up through ship confirmation.

Compatibility Constraints enable you to define a variety of transportation related restrictions related to items (goods for shipment), carriers, modes of transport, facilities, organizations, and customers. Then, these restrictions are used by the application to warn or prevent further order processing if the defined undesirable condition is encountered. For example, you can define an item-carrier compatibility constraint stating that designated carriers cannot transport specific inventory items. When a delivery is created violating the constraint, an error or warning message will be generated. You determine the severity of the constraint violation; whether a warning or error should display.

For more information, refer to the *Oracle Transportation User's Guide*.

See

[Viewing the Status of a Delivery Line](#) on page 6-4.

Move Orders

A move order is a request for a sub inventory transfer or account issue. The pick release process creates move orders which are pre-approved requests for sub inventory transfers to bring material from its source locations in the warehouse to a staging sub inventory. Reservations created for sales orders are automatically updated and transferred you 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-sub inventory defaults (required if the staging sub inventory 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 where the Picking Engine generates these transaction line suggestions is called allocating.

Staging Locations

The destination sub inventory for a pick wave move order is the staging location into which the picked material should be deposited. Each organization should designate at least one staging sub inventory. Staging sub inventories should be reservable. Each batch created at pick release will have the same destination staging sub inventory. The default staging sub inventory 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 sub inventories or designate staging lane locators within one staging sub inventory.

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 Allocation (detailing)
3. Move Order Line Pick Confirmation
4. Ship Confirmation

Pick Release

Oracle Shipping Execution's Pick Release process creates move orders. 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 includes the item, quantity, the staging location (the destination sub inventory and locator) and a source sub inventory and locator if one was specified on the sales order line or on the Release Sales Orders window.

For non-transactable items, pick release does not use the value of Enforce Ship Sets and Ship Models in the shipping parameters. However, ship confirm does validate non-transactable items for broken ship sets and ship models.

Note: The Enforce Ship Sets and Ship Models parameter, within the Pick Release tab on the Shipping Parameters window, enables you to control where ship sets and models are enforced, at picking or at shipping. For more information on this parameter, refer to the *Oracle Order Management Suite Implementation Manual*.

For non-reservable items, allocation and pick release run, but suggestions are not created during pick release, and pick confirm will not run for the item. You can print pick slips, but they will not be detailed with subinventory and stock locator to pick from, however they will list the item and quantity to be picked. Auto-allocate should be Yes and Auto-pick-confirm can be set to any.

See

[Non-Reservable Items](#) on page 9-3

Detail Line Allocation (Detailing)

To release the move order lines created at Pick Release to the warehouse and to print pick slips, the lines must be allocated. The allocation process for a pick wave move order line also creates a high level (organization level) reservation for the item(s) if no previous reservations exist for them. You can choose to do this immediately after the move order lines are created or to postpone this step until a later point in time. Once the lines are allocated, they have a status of Released to Warehouse.

Postponing the detailing process might be employed by organizations that pick release across multiple warehouses but prefer to enable 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 Parameters window. This default can be overridden at each Pick Release through the Release Sales Orders window.

Pick Confirmation

The move order line details must be transacted (in Inventory) to confirm the material drop-off in staging. Pick confirmation executes the sub inventory transfer that systematically moves the material from its source location in the warehouse to the staging location. Pick Confirmation automatically transfers the high level

reservation to a allocated reservation (including lots, sub inventory and locators) in the staging location.

Inventory updates Shipping Execution with the results of the pick confirm:

- Pick Confirmed quantity is assigned a status of Staged/Pick Confirmed.
- Unconfirmed quantity is assigned a status of Backordered.

At pick confirmation, you can report a missing quantity or change information if material is picked from a different lot, serial, locator, or sub inventory. Auto pick confirm can be set up as the default to occur immediately after the lines are detailed if an organization's picks rarely deviate from the suggested picking lines or the overhead of requiring a Pick Confirmation is unmanageable. You can set up a default Pick Confirm policy in the Inventory organization parameters. This default can be overridden at each Pick Release.

Pick confirmation follows the allocation and reservation process automatically if both the Auto Allocate and Auto Pick Confirm options are selected in the Release Rules window. Pick Confirm always follows the detailing and reservation process. If Auto Allocate is not chosen, it is not possible to Auto Pick Confirm.

Note: Even if automatic pick confirm is used, the material is only transacted to the staging subinventory and reserved. You 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.

After you perform a partial move transaction on a move order, the delivery detail shipped quantity is usually blank. However, if the move order is for a serial controlled item, the shipped quantity appears. Generally, the requested quantity of a staged delivery detail is the shipped quantity because the non-shipped quantity is split into separate backorder delivery lines. However, for delivery details with serial controlled items, the shipped quantity has a value so that you can enter the serial numbers when transacting.

Overpicking

Overpicking is using the pick confirm transaction to pick more than the requested quantity of a delivery, up to the overshipment tolerance. In addition, you can

prevent LPNs and lots from breaking into small amounts only because delivery detail and lot quantities do not match.

To overpick, you must pick confirm manually using the Oracle Inventory Transact Move Order form.

Delivery lines with zero requested quantity cannot be ship confirmed alone or left behind by ship confirmation of the last delivery lines with non-zero requested quantities.

The error WSH_REQ_ZERO_INSIDE_ERROR will be generated if the total requested quantity of delivery details inside the delivery, for one source line, is zero. The solution to this error is to assign the delivery detail with a non-zero requested quantity for that source line, to the delivery.

The error WSH_REQ_ZERO_OUTSIDE_ERROR will be generated if the total requested quantity of delivery details outside of the delivery for one source line is zero. There are three possible actions that you can take to avoid this error, including the following:

- Assign all of the delivery details for the source line to the delivery
- Unassign at least one delivery detail for the source line from the delivery
- Completely back order or cycle count all of the delivery details for the source line outside of the delivery

Overshipping

If you pick the requested quantity of a delivery detail, you can overship within the overship tolerance.

If you overpick the requested quantity of a delivery detail, you cannot overship that delivery detail but you can overship the cumulative line (the sum of all the split lines) within the overship tolerance. However, you cannot ship confirm a greater quantity than the quantity that you picked, regardless of the overship tolerance.

You can overpick a ship set and you can overship items in the ship set as long as the amount shipped does not break the ship set.

The shipped quantity validation is executed at ship confirm, enabling you to overship based on your overship tolerance. You can overship one delivery line or split the overshipment between delivery lines. The overship tolerance will determine the available quantity to overship, but will not exceed the maximum. For example, you have an order consisting of three delivery lines. The overship

tolerance is 50%. The following table illustrates the possible outcome of the overship based on the three delivery lines:

Table 8–1 Overshipping Example

Detail	Required	Shipped	Delivery
1	5	10	1
2	3	3	2
3	2	2	3

The maximum for delivery 1 is 10 because the total requested quantity of the remaining two lines is 5. 5 is subtracted from the maximum of 15 (obtained from the overship tolerance of 50%) for the order line in order to obtain the allowance for the remaining deliveries.

Overpicking Processing

The overpicking process calculates the following quantities and uses zero when the calculation results in a negative number:

- $\text{Excess Pick Quantity} = \text{Picked Qty} - \text{Shipped Qty} - \text{Backordered Qty} - \text{Staged Qty}$
- $\text{Backordered Quantity} = \text{Requested Qty} - \text{Shipped Qty} - \text{Staged Qty}$
- $\text{Staged Quantity} = \text{Requested Qty} - \text{Shipped Qty} - \text{Backordered Qty}$: You cannot stage in excess of this quantity.
- $\text{Quantity to Backorder} = \text{Requested Qty} - \text{Shipped Qty}$: You cannot backorder in excess of this quantity.

After you pick confirm, Oracle Inventory passes the following information to Oracle Shipping Execution:

- Quantity pick confirmed.
- Quantity of allocations pending pick confirm: The sum of quantities of allocations pending pick confirm transactions. You cannot create allocations in the pick confirm transaction.

After pick confirm, Picked Quantity is the same as or more than Requested Quantity.

If you pick less than the Requested Quantity, pick confirm splits the delivery line:

- The original line quantity is the detailed quantity. Its released status progresses to Staged/Pick Confirmed.
- The new line quantity is the difference between the requested quantity and the detailed quantity. Its released status is Backorder.

When there is a pending quantity, Oracle Shipping Execution processes the delivery detail differently, depending on whether the overpick:

- Satisfies the delivery line requested quantity: It creates an overpick-pending delivery line with Requested Quantity of zero and Picked Quantity of the quantity that remains to be pick confirmed.
- Results in a pending quantity: It creates a normal delivery line to await subsequent pick confirm transactions. It has status Released to Warehouse and has a Requested Quantity.

When either the Picked Quantity or the Pending Quantity is blank, pick confirm:

- Backorders the delivery line if its Picked Quantity is null and the Requested Quantity is greater than zero.
- Delete the delivery line if its Requested Quantity is null and the Picked Quantity is greater than zero.

If there is at least one allocation pending, there will be a delivery line with status Released to Warehouse that may be pending overpick. If a delivery line is fulfilled by the Picked Quantity and there is a Pending Quantity, pick confirm creates a new delivery line pending overpick.

The unshipped, picked quantity in excess of the requested quantity is removed at ship confirm; it cannot be staged or backordered.

If a move order line quantity is reduced because the order line quantity is reduced, you cannot overpick the move order line in excess of the original allocated quantity.

When you overpick, the requested quantity not yet staged is reduced accordingly. The move order line can be partially cancelled. Although you sometimes have to overpick, you do not have to overship.

You can find the following fields that pertain to overpicking on the Transactions form, Folder and the Transactions form, Lines/LPN detail region:

- Picked Quantity
- Secondary Picked Quantity
- Pending Overpick check box

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. You may choose to ship confirm only part of the sales order quantity. In this case, the balance of the sales order may be backordered. Back ordering 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, then you can select Action, Cycle Count. Cycle count the missing or damage quantity and choose OK. The quantity transferred to cycle count defaults to the backorder field on the split 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 sub inventory with the reservation intact.

Shortages and Backorders

During detailing, if the quantity requested is greater than the quantity allocated on the move order line (shortage), pick release performs auto-backordering. It:

- Splits the delivery line as follows:
 - The original line quantity is the detailed quantity. Its released status progresses-- Ready to Release becomes Released to Warehouse (or Staged/Pick Confirmed if pick release auto pick confirms).
 - The new line quantity is the difference between the requested quantity and the detailed quantity. Its released status is Backorder. It has no move order line reference; it will have one after you pick release it.
 - Updates the move order line that is associated with the original delivery detail: Oracle Inventory changes the requested quantity on the move order line to the detailed quantity.

- Notifies Oracle Order Management to update the sales order line and to change its status to Backordered.
- Unassigns the delivery line from the delivery.
- If the delivery line is assigned to containers, unassigns the delivery line from the containers and unassigns the empty containers from the delivery.

Example: Shortage at Detailing

You book and release a sales order line for 10 units of item A. Pick release finds 7 available for allocation. The following occurs:

- Oracle Inventory updates Oracle Shipping Execution with the detailing results.
- Auto-backorder splits the delivery line.
- Auto-backorder notifies Oracle Order Management to split the sales order line.
- Oracle Shipping Execution reduces the requested quantity on the move order line.

The sales order lines appear as follows:

- Line: 1; Item: A; Quantity: 7
- Line: 1.1; Item: A; Quantity: 3

The delivery details appear as follows:

- Line: 100; Sales Order Line: 1; Item: A; Quantity: 7; Status: Released; Move Order Line: 1000
- Line: 101; Sales Order Line: 1.1; Item: A; Quantity: 3; Status: Backordered

The move order line appears as: Line: 1000; Required Quantity: 7; Detailed Quantity: 7

The move order line detail appears as Line: 10000; Move Order Line: 1000; Quantity: 7; From Location: Stores; To Location: Staged

At pick confirm, since the move order line was changed at detailing, it closes the move order line even though all 10 units were not found. The move order line appears as Line: 1000; Required Quantity: 7; Detailed Quantity: 7; Complete Quantity: 7. It removes the move order line detail.

At ship confirm, the delivery details appear as Line: 100; Sales Order Line: 1; Item: A; Quantity: 7; Status: Shipped. It removes the move order line even though all 10 units were not found.

Example: Shortage at Pick Confirmation

You book and release a sales order line for 10 units of item A.

The sales order lines appear as Line: 1; Item: A; Quantity: 10

The delivery details appear as Line: 100; Sales Order Line: 1; Item: A; Quantity: 10; Status: Released; Move Order Line: 1000

The move order line appears as: Line: 1000; Required Quantity: 10; Detailed Quantity: 10

The move order line detail appears as Line: 10000; Move Order Line: 1000; Quantity: 10; From Location: Stores; To Location: Staged

At pick confirm, the picker can only find seven units, requests Oracle Shipping Execution to redetail the balance, and the detailing process cannot find more of the item. The following occurs:

- Oracle Inventory updates Oracle Shipping Execution with the detailing results.
- Auto-backorder splits the delivery line.
- Auto-backorder notifies Oracle Order Management to split the sales order line.
- Oracle Shipping Execution reduces the requested quantity on the move order line.

The sales order lines appear as follows:

- Line: 1; Item: A; Quantity: 7
- Line: 1.1; Item: A; Quantity: 3

The delivery details appear as follows:

- Line: 100; Sales Order Line: 1; Item: A; Quantity: 7; Status: Released; Move Order Line: 1000
- Line: 101; Sales Order Line: 1.1; Item: A; Quantity: 3; Status: Backordered

The move order line appears as: Line: 1000; Required Quantity: 7; Detailed Quantity: 7; Complete Quantity: 7. It removes the move order line detail.

At ship confirm, the delivery details appear as Line: 100; Sales Order Line: 1; Item: A; Quantity: 7; Status: Shipped. It removes the move order line.

Serial Numbers

Detailing can suggest serial numbers to be transacted to fulfill the pick wave move order line. You can change the suggested (pre-specified) serial numbers if the picker

choose 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 the Allocate Serial Numbers check box on the Organization Parameters window. 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.

You can change serial numbers only for items with attribute Serial Generation At Sales Order Issue for Staged Lines. For Serial Generation Predefined and At Receipt, you enter the serial numbers at pick confirm.

When you change pre-specified serial numbers:

- The list of values displays only serial numbers in the staging sub inventory. You must manually move the pre-specified serial number to the staging sub inventory. A serial controlled item that is not selected remains in the staging sub inventory
- Oracle Inventory marks pre specified serial numbers during pick confirm so that they cannot be used in a transaction for a different order.

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, you can perform a sub inventory transfer to move the correct serial number to the staging location and then perform another sub inventory 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 not necessary to enter serial numbers at Ship Confirmation unless a change occurs.

Reservations

The material picking process also manages Supply Chain Reservations. 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 sub inventory) reservation in the staging location. Staging sub inventories should be reservable.

Identifying Potential Shortages

If the allocation 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 enable the picker to direct it to another location or by re-releasing the Sales Order through Pick Release.

See

Move Orders, *Oracle Inventory User's Guide*

Releasing Sales Orders for Picking

The Release Sales Orders for Picking window specifies the criteria for releasing one or more order lines. You can select order lines based on a number of criteria such as warehouse, shipment request date, and item. Shipping Execution only releases delivery lines which have been booked and have met the prerequisites for Pick Release.

There are two methods for running Pick Release from this window, including the following:

- **Online:** Releases an order, Trip, Trip Stop, or delivery immediately, thus eliminating time spent waiting to process through the Concurrent Manager queue. However, if this method is selected, you must wait until pick release completes prior to running other processes.
- **Concurrent:** Releases in the background for multiple orders, Trips, or deliveries, enabling you to run other processes simultaneously.

The following rules determine how Pick Release handles order lines and picking lines:

- **Release Rules:** Specify your picking criteria through pick release parameters. The Scheduled Ship Dates and Requested Dates criteria display from the release rule (if you select one) as follows:

Note: The date displayed depends on the relationship of the release rule date and the current date.

- If the current date is later than the release rule date, the date that displays is the current date. For example, if the release rule date is 21-August and you launch pick release on 24-August, the date that displays is 24-August.

- If the release rule date is later than the current date, the date that displays is the date on the release rule. For example, if the release rule date is 29-August and you launch pick release on 24-August, the date that displays is 29-August.

Note: The timestamp display always shows the timestamp of the release rule, regardless of the time that you launch pick release.

For more information on Release Rules, refer to the Shipping Execution Setup chapter of the *Oracle Order Management Suite Implementation Manual*.

- 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
 - Scheduled date
 - Departure date
 - Shipment priority

For example, if you wanted to ensure that delivery line items with the earliest Scheduled Ship Dates were released before any other similar items, you could create a Release Sequence Rule that would release items with the earliest scheduled dates first and then select that rule during Pick Release. You must specify a Release Sequence Rule.

For more information on Release Rules, refer to the Shipping Execution Setup chapter of the *Oracle Order Management Suite Implementation Manual*.

- Pick Slip Grouping Rules define how move order lines are grouped together on a pick slip. You must specify a Pick Slip Grouping 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.

The Shipping tab is utilized to supply the following information:

- Trip
- Delivery
- Ship Method
- Line/Container
- Release Sequence Rule
- Stop
- Ship From
- Shipment Priority
- Autocreate Delivery
- Include Assigned Lines

Note: Include Assigned Lines is a check box that, if selected, enables the lines assigned to the delivery to be selected and picked. If this check box is not selected, the lines assigned to the delivery will not be selected and picked.

The Inventory tab is utilized to supply the following information:

- Warehouse
- Project (used if Oracle Project Manufacturing is enabled)
- Task (used if Oracle Project Manufacturing is enabled)
- Pick Slip Grouping Rule
- Auto Allocate
- Auto Pick Confirm

- Plan Tasks (used if Oracle Warehouse Management is enabled)
- Pick From Subinventory and Locator
- Default Stage Subinventory and Locator

Credit Checking and Holds

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.

Credit checking is activated in the Transaction Types window utilizing Credit Check Rules that are assigned to any or all of the following:

- Ordering:
- Pick Release: The order is evaluated to see if it violates your credit checking policies at pick release. 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
- Packing: The order is evaluated to see if it violates your credit checking policies before it is packed and after it is picked. If it does, the order is placed on hold
- Shipping: The order is evaluated to see if it violates your credit checking policies before it is shipped and after it is packed.

Note: It is not mandatory that you enforce Credit Checking. You can choose not to assign a Credit Check Rule in the Transaction Types window. Utilizing this option will ensure that the system does not run Credit Checking at any point.

Credit holds will be enforced from the supplier instance. If you utilize a third-party shipping warehouse, and a credit hold is enforced on an order, the shipment request will not be sent to your third-party shipping warehouse until the hold has been lifted.

Prerequisites

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

Pick Releasing from the Shipping Transactions Form

From the Shipping Transactions form, you can pick release trips, stops, deliveries, containers (LPNs), and lines. You can run pick release in the Shipping Transactions window by selecting any of the following from the Actions menu:

- Launch Pick Release
- Pick and Ship
- Pick, Pack, and Ship

For more information on Pick and Ship or Pick, Pack, and Ship, refer to the topic [One Step Shipping](#) on page 5-33.

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 assigned to a trip that may originate from more than one warehouse.

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. Click Go.

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

4. Click Done.
5. Save.

Note: Alternate Pick Release methods:

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

To release a sales order:

1. Navigate to the [Query Manager](#), and find the trip.

The trip displays in the Shipping Transactions window.

Figure 8–1 Trip Window

The screenshot shows a window titled "Trip - New" with a "Trip" tab. The form contains the following fields and controls:

- Name:** 71429
- Status:** Open
- Ship Method:** (empty)
- Activity:** (empty)
- Carrier:** (empty)
- Service Level:** (empty)
- Mode of Transport:** (empty)
- Consolidate
- Planned
- Exceptions
- Vehicle Section:**
 - Organization:** (empty)
 - Item Name:** (empty)
 - Number Prefix:** (empty)
 - Number:** (empty)
- Arrive after Trip:** (empty)
- Tender Status:** (empty)
- Routing Instructions:** (empty)

At the bottom, there is an "Actions" dropdown menu set to "Ship Confirm", a "Go" button, and a "Done" button.

2. From the Tools menu, select Pick Release Form.
3. Complete your entries in the Release Sales Order for Picking window. Optionally, select a Based On Rule to automatically default the pick release criteria for the selected rule.

Note: If you have not created a release rule or do not want to use an existing release rule, do not select a Based on Rule. See *Shipping Execution Setup, Defining Release Rules in Oracle Order Management Suite Implementation Manual*.

4. Choose the Concurrent or Online button to pick release the deliveries and delivery lines for the trip.
5. Save your work.

Order Cancellations

With the new material picking process, a sales order can now be canceled after it has been pick released without requiring you to backorder in Oracle Shipping Execution. If an order quantity is reduced after pick release, 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 you.

Ship Confirm

Topics covered in this chapter include the following:

- [Overview of Ship Confirm](#) on page 9-2
- [Ship Confirm Features](#) on page 9-3
- [Automated Ship Confirmation](#) on page 9-8
- [Assigning Serial Numbers to Delivery Line Items](#) on page 9-17

Overview of Ship Confirm

Ship Confirm is the process of recording that items have shipped. When you ship confirm a delivery, Shipping Execution confirms that the delivery lines associated with the delivery have shipped.

The options in the Confirm Delivery window provide flexibility for automating many tasks associated with processing deliveries with many delivery lines. For example, when the Ship Entered Quantities, Unspecified Quantities Ship option is selected at ship confirm, the shipped amounts are automatically processed so that each delivery line with a missing shipped quantity value is recorded as fully shipped. This saves you from manually entering each item as fully shipped.

During ship confirm, you can also automatically create a trip and related stops for a delivery that has not been assigned to a trip.

Note: If you utilize Oracle Transportation, compatibility constraints can be used in the shipping process up through ship confirmation.

Compatibility Constraints enable you to define a variety of transportation related restrictions related to items (goods for shipment), carriers, modes of transport, facilities, organizations, and customers. Then, these restrictions are used by the application to warn or prevent further order processing if the defined undesirable condition is encountered. For example, you can define an item-carrier compatibility constraint stating that designated carriers cannot transport specific inventory items. When a delivery is created violating the constraint, an error or warning message will be generated. You determine the severity of the constraint violation; whether a warning or error should display.

For more information, refer to the *Oracle Transportation User's Guide*.

Note: If Oracle Transportation is installed, the ship confirm process may recalculate the freight rate for deliveries at ship confirm depending on whether specific changes have occurred with the delivery that warrant a new rate.

For a list of the actions that cause recalculating, see [Freight Rate Recalculation Actions](#) on page 5-29

Ship Confirm Features

Backordering

You may choose to backorder, for example, if one of your customers will have a down production line if you do not ship allocated material to them right away. You can ship a partial quantity to the intended customer and backorder the remaining quantity to accommodate the down line situation. You run pick release on the backordered delivery line to allocate it to the down-line customer.

If you decide to backorder at ship confirm, use either of the following ship confirm options:

- **Ship Entered Quantities, Unspecified Quantities Backorder:** The ship confirm process splits the delivery line as follows:
 - The original line quantity is the detailed quantity. Its released status progresses--Released to Warehouse becomes Staged/Pick Confirmed and Staged/Pick Confirmed becomes Shipped.
 - The new line quantity is the difference between the requested quantity and the detailed quantity. Its released status is backordered. It has no move order line reference; it will have one after you pick release it.
- **Backorder All:** The ship confirm process places the delivery line into backorder.
- With either option, if the delivery detail is assigned to a trip in Planned status, the ship confirm process keeps the delivery and container assignments. If the trip is not planned, the ship confirm process unpacks packed containers.

When you backorder at ship confirm, the inventory shows in a staging location. If you move the backordered material, perform a sub inventory transfer transaction to record this movement.

If an Assemble to Order (ATO) item is backordered, the sales order line will be split (one part of the line contains the quantity that shipped and the other part of the line contains the backordered quantity) and the reservation for the item will be lost. You will have to re-reserve the item. However, by setting the profile option WSH:Retain ATO Reservations to Yes, you can avoid the redundancy of re-reserving the item. The inventory system retains the reservation and the reservation status changes from Staged to Unstage, while the delivery line status changes to Backordered.

Non-Reservable Items

Non-reservable items require that you specify the subinventory and stock locator to pick the items from at ship confirm. You will also specify lot, serial, and revisions at

ship confirm if applicable. You can also specify the subinventory and stock locator, to pick the item from, through the Item Transactions Default form. Using this method will also require that you specify lot, serial, and revision at ship confirm, if necessary.

Models

You can ship a model non-proportionately, for example:

- You ship all of the components but not in the correct proportion.
- You do not ship all of the components.

When you ship a model in this manner, Oracle Order Management breaks the model and treats each order line as an individual line. Non-shippable lines become fulfilled and eligible for invoicing. To prevent this, do either of the following:

- Put the PTO model into a fulfillment set: none of the lines move beyond fulfillment until all the lines are fulfilled.
- Use header level invoicing; none of the lines are eligible for invoicing until all of the lines are eligible for invoicing.

Prerequisites

Delivery lines must be released.

Delivery must be open.

At least one delivery line must be assigned to the delivery.

Note: If lines are not released or do not satisfy Inventory controls, a warning appears and they are unassigned from the delivery at Ship Confirm time.

To ship confirm a delivery:

1. Navigate to the [Query Manager](#) window, and find the delivery.
The delivery displays in the Shipping Transactions window.
2. From the Actions menu, select Ship Confirm to display the Confirm Delivery window.

Figure 9–1 Confirm Delivery Window

The screenshot shows a window titled "Confirm Delivery" with the following fields and options:

- Ship Options:**
 - Ship Entered Quantities (Unspecified Quantities: **Ship**)
 - Ship All
 - Backorder All
 - Cycle Count All
- Create Delivery for Staged Quantities
- Auto-create Trip Options:**
 - Ship Method: **AIR**
 - Actual Departure Date: **20-MAR-2003 12:52:55**
 - Set Delivery In-Transit
 - Create Bill of Lading
 - Close Trip
 - Defer Interface
- Document Set: **Ship Confirm Documents**
- Buttons: **OK** and **Cancel**

- In the Ship Options region, select one of the following ship confirm options:

 - Ship Entered Quantities, Unspecified Quantities Ship: Ship confirms the quantity of items specified in the Shipped Quantity field and treats blank values as full quantity (shipped quantity = requested quantity). For example, if the Requested Quantity is 10 and the Shipped Quantity field is blank (no values entered), the full quantity (10) is shipped and displays in the Shipped Quantity field.
 - Ship Entered Quantities, Unspecified Quantities Backorder: Ship confirms the quantity of items specified in the Shipped Quantity field and treats blank quantities as full backorders (backorder quantity = requested quantity). For example, if the Requested Quantity is 10 and the Shipped Quantity field is blank (no values), the full quantity (10) is backordered and displays in the backordered Quantity field.
 - Ship Entered Quantities, Unspecified Quantities Stage: Leaves the unspecified delivery line quantity as staged and removes it from the delivery. For example, if the Requested Quantity is 10 and the Shipped

Quantity field is blank (no values), the full quantity (10) remains in the Stage Quantity field and the line is no longer associated with a delivery.

Note: If a non-zero Stage Quantity exists on a line, it is split from the line and unassigned from the delivery. If the Create Delivery for Staged Quantities is enabled, all staged delivery lines are grouped together in a new delivery.

- Ship Entered Quantities, Unspecified Quantities Cycle Count: Ship confirms the quantity of items specified in the Shipped Quantity field, treats blank quantities as full backorders (backorder quantity = requested quantity), and transfers the backorder reservation to cycle counting. For example, if the Requested Quantity is 10 and the Shipped Quantity field is blank (no values), the full quantity (10) is backordered and transferred to cycle counting. You can also transfer delivery quantities to cycle count prior to ship confirm by using the Shipping Transactions form, Cycle Count action.
- 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).

Note: If the delivery status is Closed, the delivery is unassigned from all trips and all lines will be unassigned from the delivery.

- Cycle Count All: Backorders the entire quantity irrespective of what was entered (shipped quantity = 0, backorder quantity = requested quantity) and transfers the backorder reservation to cycle counting. You can also transfer delivery quantities to cycle count prior to ship confirm by using the Shipping Transactions form, Cycle Count action.
4. Enable the Create Delivery for Staged Quantities box (default setting), if you want all staged delivery lines grouped together in a new delivery.

If you do not want to create a trip for the delivery, click Go to ship confirm and save your work.

Note: Auto-create trip options are dimmed if the selected delivery is already assigned to a trip.

5. In the Auto-create Trip Options region, select or update the Ship Method and the Actual Departure Date. This enables you to specify the stop departure date which is the date Order Management Inventory interface will occur.

One way to ship confirm one or more deliveries is to enable the Set Delivery in-Transit and Close Trip fields in the Confirm Delivery window:

- Set Delivery In-transit: Creates a trip and stops for the delivery. Closes the 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.

You can enter a future Actual Departure Date. If Allow Future Ship Date in the Shipping Parameters form, Shipping Transactions tabbed region, is cleared, do not do so as you receive an error. If Allow Future Ship Date is selected, you receive a warning and the Inventory Interface concurrent process does not process the transaction until the actual departure date.

6. Enable the Create Bill of Lading box if you want to create a Bill of Lading. This generates a Bill of Lading number and prints it if it is part of a document set.
7. Choose one of the following:
 - If you disable the Defer Interface box and run Ship Confirm, inventory gets decremented and the order line is updated with the shipped quantity.
 - If you enable the Defer Interface box and run Ship Confirm, you need to run the Interface Trip Stop-SRS concurrent request to update the Inventory and the Order Line status. When the Defer Interface box is enabled, a request is not automatically submitted to interface the trip stops.

Note: The Defer Interface is defaulted by the Shipping Parameters set-up.

8. Select the document set you want printed for the delivery and click OK.
9. Save your work

Note: If a delivery is in confirmed status, the pick-up stop has to be closed manually to update Inventory/Order Management (OM). The delivery can be re-opened at any time to make changes as long as the delivery is in confirmed status.

Note: If you are utilizing Oracle Project Contracts and your delivery or a delivery line requires inspection (per Oracle Project Contracts), the Inspection Status field, within the Shipping tab of the LPN window, will display Required. You must change this status to Inspected before Oracle Shipping Execution will ship confirm the delivery. A WARNING message will be displayed, at ship confirm, if this circumstance occurs.

Automated Ship Confirmation

Auto Ship Confirm enables you to automatically ship confirm all deliveries that have all lines at status of staged. Auto Ship Confirm can be executed as a concurrent program (set to run at specific intervals) or it can be launched manually.

Each method of executing Auto Ship Confirm has its advantages. You can utilize either or both processes depending on your business needs.

- **Concurrent submission:** If Auto Ship Confirm is executed as a concurrent job, you will not have to manually ship confirm each delivery. If configured to do so, this method can also create a trip if one isn't already associated with the delivery. It is designed to support delivery selection based on range of parameters. Because the concurrent request is typically run at frequent intervals, there is little opportunity for backordering lines prior to ship confirm.
- **Manual submission:** Manually submitting Auto Ship Confirm enables you to control when each ship confirm process will be executed by invoking the process manually.

You can disable Auto Ship Confirm on any delivery by utilizing the Enable Auto Ship Confirm flag, located within the Additional Delivery Information tab of the Delivery window. If the check box is selected, the delivery will be considered for Auto Ship Confirm. If it is not selected the delivery will not be considered.

You can view the deliveries included in an Auto Ship Confirm batch by utilizing the Query Manager Window. Search for Deliveries and select the Additional tab. Find your batch number in the Auto Ship Confirm list of values.

Auto Ship Confirm Rules

Auto Ship Confirm Rules enable you to choose your Auto Ship Confirm options. Before executing the Auto Ship Confirm process, you are required to select a Ship Confirm Rule to base the Auto Ship Confirm process on. Using the [Ship Confirm Rules](#) window, you can define as many rules as you need depending on your business needs.

Auto Ship Confirm Report

The Auto Ship Confirm Report is submitted automatically at the end of Auto Ship Confirm. This report is detailed in the [Reports, Processes, and Documents](#) chapter of this guide.

Executing the Auto Ship Confirm Process

Before you can execute the Auto Ship Confirm process, you must define an Auto Ship Confirm Rule.

Defining an Auto Ship Confirm Rule:

To define an Auto Ship Confirm Rule, consider the following:

1. Navigate to the [Ship Confirm Rules](#) window.
2. Enter a unique rule name in the Auto Ship Confirm Rule field.
3. Optionally, select an Effective date.

Note: The default Effective date will be the current date. You can modify this date to suit your business needs. Also, you can enter an ending Effective date to disable the rule if needed.

4. Within the Ship Options region, select one of the following options from the Action list of values:
 - Ship Entered Quantities
 - Ship All
 - Backorder All
 - Cycle Count All

Note: If you want your rule to be eligible as the default rule in the Shipping Parameters window, you must select Ship All as your option.

5. The Ship Options region also enables you to determine the action to perform with Unspecified Quantities. Select one of the following options:
 - Ship
 - Backorder
 - Stage
 - Cycle Count
6. Determine whether you want to Create Delivery for Staged Quantities. The system will create the deliveries if this option is selected and will not create deliveries if the check box is not checked.

Figure 9–2 Ship Confirm Rules Window

Ship Confirm Rules

Auto Ship Confirm Rule Effective -

Ship Options

Action Unspecified Quantities

Create Delivery for Staged Quantities

Auto-create Trip Options

Ship Method

Set Delivery In-Transit Defer Interface

Close Trip Create Bill of Lading

Pre-existing Trip Options

Set Delivery In-Transit Defer Interface

Close Trip Create Bill of Lading

Document Set

7. Within the Auto-create Trip Options region, select a Ship Method using the list of values.
8. The remaining options within the Auto-create Trip Options region also require attention. These options include the following:
 - Set Delivery In-Transit
 - Close Trip
 - Defer Interface
 - Create Bill of Lading

Note: If Close Trip is not enabled (if the Close Trip check box is not selected) all trips must be manually closed.

9. Within the Pre-existing Trip Options region, you determine what action the system will take if a trip is manually created. The options include the following:
 - Close Trip
 - Set Delivery In-Transit
 - Defer Interface
 - Create Bill of Lading

Note: If Close Trip is not enabled (if the Close Trip check box is not selected) all trips must be manually closed.

10. Finally, use the Document Sets field list of values to select the document set that will print with the shipment.

Auto Ship Confirm from Release Sales Order Window:

You can manually execute Auto Ship Confirm within the Release Sales Orders for Picking window.

From the Release Sales Orders for Picking window you can specify an individual sales order or a pick release batch to perform Auto Ship Confirm. Auto Ship Confirm will be performed for all the deliveries in the pick release batch or on the individual order, depending on your selection.

To manually execute the Auto Ship Confirm process from the Release Sales Orders for Picking window, consider the following:

1. Navigate to the [Release Sales Orders for Picking](#) window.
2. Query the specific sales order, or query the batch number.

Note: For detailed information on running Pick Release and the Release Sales Orders for Picking window, refer to the topic [Releasing Sales Orders for Picking](#) on page 8-14 of this guide.

3. Delete the dates that are in the Scheduled Ship Dates and Requested Dates regions.

Note: These dates must be deleted, otherwise the system will only look for shipments within those dates. If your order number does not fall within those dates, the lines will not be picked.

4. Within the Inventory tab, select the warehouse.
5. Within the Inventory, in the Auto Pick Confirm field, select Yes.
6. Within the Shipping tab, in the Auto Ship Confirm Rule field, select the rule that you want to use for auto ship confirming.
7. From the list of values in the Autocreate Delivery field, select Yes.
8. Select Online to process the request.

Within the Shipping Transactions window you can select deliveries or delivery lines that you want Auto Ship Confirm to run against.

To manually execute the Auto Ship Confirm process from the Shipping Transactions window, consider the following:

1. Navigate to the [Query Manager](#) window.
2. Search for your delivery or for your order using the Query Manager window.

Note: For detailed information on using the Query Manager, refer to the topic [Query Manager](#) on page 2-2

3. Select the delivery or delivery lines for the shipment.
4. Within the Actions region, select Pick and Ship or Pick, Pack and Ship from the list of values depending on your needs.

Note: The action Pick, Pack, and Ship is used if an organization utilizes the packing features of Oracle Shipping Execution. The packing functionality is determined in the Autopack Deliveries field, within the Pick Release tab of the Shipping Parameters window.

5. Select Go.

Executing the Auto Ship Confirm Process Concurrently:

To execute the Auto Ship Confirm process, consider the following:

1. Navigate to the [Ship Confirm Deliveries SRS](#) window.

Note: The Parameters window will be active immediately.

2. Populate the parameter fields as needed, including the following:
 - Ship Confirm Rule: Select the appropriate rule from the list of values. This field is required.
 - Ship Confirm Batch Prefix: Define a batch prefix to uniquely identify your request. Although this field is free form, it is required.
 - Organization: Optionally, select the organization that the shipment is originating from.
 - Pick Release Batch: Optionally, select the Pick Release Batch name that contains the deliveries that you are ship confirming.
 - Auto Pack Batch: Optionally, select the Auto Pack Batch name that contains the deliveries that you are ship confirming.
 - Delivery Name (Low): Optionally, select the low end of delivery names, if you choose to ship confirm based on a range of delivery names.
 - Delivery Name (High): Optionally, select the high end of delivery names, if you choose to ship confirm based on a range of delivery names.
 - Bill of Lading (Low): Optionally, select the low end of bill of ladings, if you choose to ship confirm based on a range of bill of ladings.
 - Bill of Lading (High): Optionally, select the high end of bill of ladings, if you choose to ship confirm based on a range of bill of ladings.
 - Planned: Optionally, select Yes/No to indicate whether the deliveries scheduled for auto ship confirm are planned.
 - Ship From Location: Optionally, select a ship from location to ship confirm.
 - Ship To Location: Optionally, select a ship to location to ship confirm.
 - Intermediate Ship To Location: Optionally, select an intermediate ship to location to ship confirm.

- Pooled Ship To Location: Optionally, select a pooled ship to location to ship confirm.
- Consignee/Customer Name: Optionally, select a consignee or customer name to ship confirm.
- Ship Method: Optionally, select a ship method to ship confirm.
- FOB: Optionally, select a FOB terms to ship confirm.
- Freight Terms: Optionally, select freight terms to ship confirm.
- Pick-up Date (Low): Optionally, select the low end of a pick up date, if you want to use a range of pick up dates, to ship confirm.
- Pick-up Date (High): Optionally, select the high end of a pick up date, if you want to use a range of pick up dates, to ship confirm.
- Drop-off Date (Low): Optionally, select the low end of a drop off date, if you want to use a range of drop off dates, to ship confirm.
- Drop-off Date (High): Optionally, select the high end of a drop off date, if you want to use a range of drop off dates, to ship confirm.
- Log Level: Optionally, select log level for this run. This determines whether a debug file is created. Select zero for no debugging log, or one to create a debugging log.

Figure 9–3 Ship Confirm Deliveries SRS Window

The screenshot shows a 'Parameters' dialog box with the following fields:

- Ship Confirm Rule
- Ship Confirm Batch Prefix
- Organization
- Pick Release Batch
- Auto Pack Batch
- Delivery Name (Low)
- Delivery Name (High)
- Bill of Lading (Low)
- Bill of Lading (High)
- Planned
- Ship from Location
- Ship to Location
- Intermediate Ship to Location
- Pooled Ship to Location
- Consignee/Customer Name
- Ship Method
- FOB
- Freight Terms

Buttons at the bottom: OK, Cancel, Clear, Help.

3. Select OK.
4. Within the At These Times... region, use the Schedule to specify how often you require the process to run.

Interface Trip Stop-SRS

The Interface Trip Stop-SRS process runs the interface to update Order Management sales order lines, Departure Ship Notice Outbound (DSNO) generation, and inventory depending on which interface processes you select in the Mode field. You can run this process one of two ways:

1. Automatically: The request will be executed upon ship confirm if the delivery is not assigned to a trip, or the Defer Interface check box is not selected. If the delivery is assigned to a trip, the Interface Trip Stop concurrent request

program will be run automatically when the destination Trip Stop is closed. If the delivery is not assigned to a trip, and at the time of ship confirm the Defer Interface is checked, the Interface Trip Stop concurrent request will be automatically run when the destination Trip Stop is closed.

2. Manually: To manually execute the concurrent request, navigate to the Shipping Interfaces form and select Interface Trip Stop-SRS from the Name field. The parameters window will be displayed.

The Interface Trip Stop-SRS parameters window contains the following fields:

- Mode: You select the interfaces that you want the process to run against. The list of values contains the following choices:
 - All
 - Inventory
 - OM and DSNO
- Trip Stop: Select a trip stop that you want to run the process for. The list of values will display all open trip stops.
- Delivery: Select a delivery that you want to run the process for. The list of values will display all open deliveries.

Note: If you selected a trip stop from the Trip Stop field, the Delivery field will default to the delivery associated with that trip stop when you select the list of values in the Delivery field.

- Debug Level: This is the debug log level that is used when attempting to identify the cause of an error. You can enter zero (0) for Off and one (1) for On.

Note: When the debug log level is turned on, a debug file is generated for further analysis of the issue.

Assigning Serial Numbers to Delivery Line Items

At the Lines/LPNs tab, you can manage assignment of serial numbers to delivery line items. Serial numbers can be assigned singly or consecutively to a range of items depending on your requirements.

Items must already be set up in inventory so that serial numbers can be assigned at ship confirm. This is done in Oracle Inventory in the Master Item window (Inventory tab > Serial section > Generation > At Sales Order Issue). Also, if the INV: Allocate Serial Number profile option has been set to *No*, you must manually enter the required serial numbers at ship confirm.

After pick release is run, you must enter the shipped quantity in the Shipping Transactions window before you can enter the serial numbers at ship confirm.

If you enter multiple serial numbers in the Shipping Transactions form for a staged delivery line, the Interface Trip Stop concurrent process explodes the delivery line into multiple delivery lines, each having a serial number range. For example, you are shipping a delivery line with a quantity of 10,000. If you enter 10 ranges of 1000 serial numbers each, the Interface Trip Stop concurrent process splits the delivery line into ten delivery lines. You can view the deliveries' low and high serial numbers in the Shipping Transactions form, after a run of the Inventory Interface concurrent process, by:

- Querying the Lines/LPNs folder
- Querying the Lines/LPNs folder, clicking Detail, and selecting the Inventory Details tabbed region

To assign serial numbers to delivery line items:

1. Navigate to the [Query Manager](#) window and query the order.
The order displays in the Shipping Transactions window.
2. From the Actions menu, select Launch Pick Release to pick release the order.
3. Click Detail
4. Choose the Line/LPN tabbed region and confirm that the delivery line is in Staged/Pick Confirmed status.
5. In the Quantity region, Shipped field, enter the shipped quantity.
6. Remove the cursor from the Shipped field; the process accepts the shipped quality.
7. If you are shipping one of the items:
 - Move to the Inventory Details tabbed region.
 - In Serial Number, enter the serial number. You do not need to attend to Serial Number High.
 - Click Done.

8. If you are shipping more than one of the items:

- On the menu bar, select Tools > Serial Numbers.
- To enter individual serial numbers for the item, in the Serial Number Entries Mode area, select Individual and enter the serial numbers.

To enter a range of serial numbers for the item, leave Range selected and enter the serial number range. The Range selection assumes that you are entering a consecutively numbered series beginning with the first serial number. For example, if you ship three and enter the serial number as 345, the series is 345, 346, and 347.

9. Click Done.

Note: If you reduce the quantity for a Staged line, that has serial numbers assigned at ship confirm, a warning message will indicate all serial numbers will be unmarked. It is suggested that you first unmark the serial numbers from the Serial Numbers window before reducing the quantity to be shipped.

Also note that if you ship partial quantity of lines that are assigned serial numbers at ship confirm, and stage the remainder, you will be required to manually split the delivery and serial numbers assigned and then stage the delivery.

10

Carrier Integration

Topics covered in this chapter include the following:

- [Overview of Carrier Integration](#) on page 10-2
- [UPS Rate Calculation and Service Selection](#) on page 10-3
- [Tracking Lines and Containers](#) on page 10-6
- [Calculating Time in Transit for a Delivery](#) on page 10-8
- [Validating Addresses](#) on page 10-9

Overview of Carrier Integration

Oracle Shipping Execution and United Parcel Service (UPS) are integrated through common APIs (application programming interfaces) to provide common solutions for customers who use both Oracle Shipping Execution and UPS.

The integration enables you to do the following shipping-related tasks:

- Estimate shipping costs for packages.
- Track lines and LPNs (containers).
- Find time in transit for ground shipments.
- Validate address and postal code information for a shipment.

UPS Rate Calculation and Service Selection

In the UPS Rate and Service Selection window, you can calculate rates in US dollars, and select UPS services for deliveries, lines, and LPNs (containers).

You can update freight cost values for a delivery line. Lines and deliveries with the same Ship From and Ship To address are grouped into Rate and Service Groups, and total charges for each group can be calculated. When you calculate the total charges for a line item, you can also update the freight costs for that item.

You can compare charges for different UPS services, for example, between two-day express versus overnight delivery. You can also select different tracking options, view charges, and surcharges for an item, and enter dimensions for an item.

Note: Errors display in the Errors tab.

To calculate UPS rate and service costs for a delivery:

1. Navigate to the [UPS Rate and Service Selection](#) window.

Figure 10–1 UPS Rate and Service Selection Window

The screenshot shows the 'UPS Rate and Service Selection' window. The 'Rate and Service Group' tab is active, displaying the following information:

- Ship From: Stockholm
- Ship To: Västerås
- Rate Chart: Regular+Daily+Pickup
- Service: Next Day Air Early AM
- Total Charge: (empty field)
- Currency: USD

Buttons include 'Calculate', 'Update Freight Costs', 'Previous Group', and 'Next Group'. Below the main form is a table for 'Charges' with the following data:

Line	Item	Product Charge	Surcharge	Total Charge	Commit Time
645	AS54888				

At the bottom, there is a UPS logo, the text 'Brought to you by UPS.', and a 'Done' button.

2. Navigate to the Rate and Service Group tabbed region. It displays the total freight charges in US dollars for a group and the Ship From and Ship To addresses for a delivery. You can view freight costs for a group or update freight costs for an item after completing your entries in the remaining tabs.
3. Select the rate chart and service such as ground or worldwide express.
4. Navigate to the Address Details tabbed region and view the detailed Ship From and Ship To address information.
5. Navigate to the Service Options tabbed region.
6. Select one or more service options such as Saturday Pickup or Additional Handling.
7. Navigate to the Tracking Options tabbed region.
8. Select the First and Second Ship Notification. Choose None, Domestic, or International.

9. Select the Call Tag.
10. Select the Delivery Confirmation.
11. Enable the Verbal Confirmation box if you want verbal confirmation.
12. Click Calculate to calculate the charges.
13. Navigate to the Charges tabbed region and view the product charge and surcharge and each line and item.
14. Navigate to the Weight tabbed region and view the default weight (from Oracle Inventory) for the line item displays in pounds.
15. Navigate to the Dimensions tabbed region.
16. Optionally, enter the length, width, and height for each line item.
17. Navigate to the Value tabbed region.
18. Select the packaging type and declared value for each item.
19. Click Update Freight Costs to update freight costs for the delivery lines.
20. Navigate to the Errors tab and view any errors that occur when calculating charges.
21. Click Done to save your work.

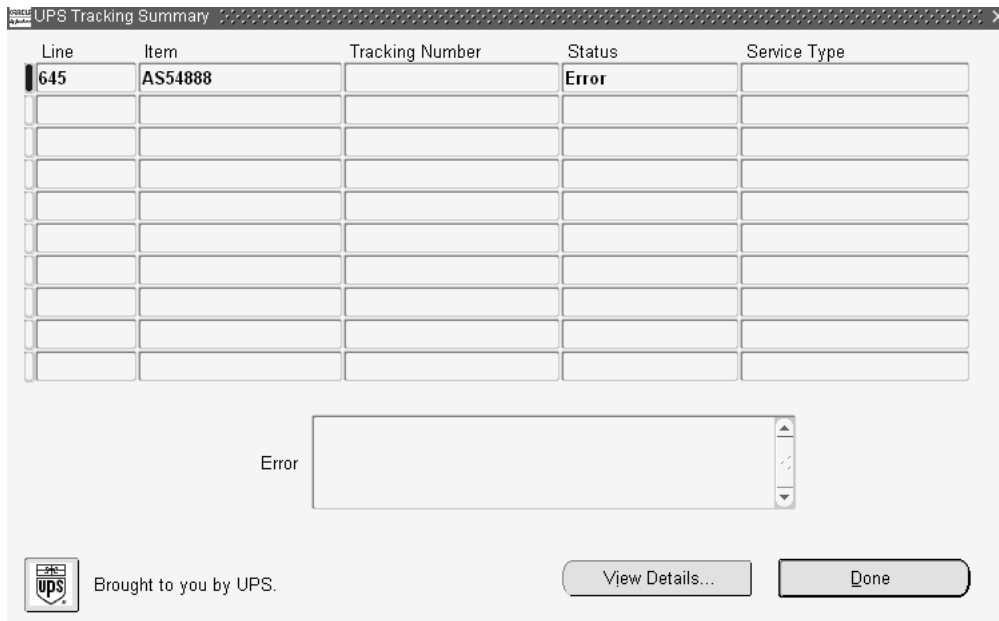
Tracking Lines and Containers

You can track UPS ground shipments for lines and containers (LPNs) and view information such as tracking numbers, status, and service type. You can also view detailed tracking information for a selected line such as the date and location where a package was picked up or dropped off. This information displays in the UPS Tracking Detail window.

To track lines and containers:

1. Navigate to the [UPS Tracking Summary](#) window.

Figure 10–2 UPS Tracking Summary Window



2. The window displays the most recent tracking information including tracking number, status such as undelivered or delivered, service type, and date.
3. To view tracking details, select a line and click View Details to display the UPS Tracking Detail window. Otherwise, click Done to exit the window.


Figure 10-3 UPS Tracking Detail Window

The screenshot shows a window titled "UPS Tracking Detail" with the following fields:

Line	645	Shipped To	
Item	AS54888	Shipped or Billed On	
Status	Error	Tracking Number	
Signed For By		Service Type	
Location		Weight (Pounds)	

Package Progress

Date	Location	Activity

 Brought to you by UPS. Done

4. The UPS Tracking Detail window displays the package progress including the date, location, and activity such as the arrival and departure scan.
5. Click Done.

Calculating Time in Transit for a Delivery

The time in transit refers to the time in business days that it takes to ship between two sites using UPS Ground service. The UPS Time in Transit window displays the time in transit, Ship From and Ship To addresses, and the corresponding origin and destination addresses used by UPS for a delivery.

To view time in transit for a delivery:

1. Navigate to the [UPS Time in Transit](#) window.

Figure 10–4 UPS Time In Transit Window

The screenshot shows the 'UPS Time In Transit' window. It features a table with columns for 'Line', 'LPN', 'Identifier/Name', 'Item', 'Ship-From Code', and 'Ship-To Code'. The first row is populated with the following data:

Line	LPN	Identifier/Name	Item	Ship-From Code	Ship-To Code
645			AS54888	Stockholm SE	Västerås1020, Västerås, 7

Below the table, there are fields for 'Ship-From Address' and 'Ship-To Address'. The 'Ship-From Address' field contains 'Farogatan 7', 'Stockholm, ,', and 'SE'. The 'Ship-To Address' field contains 'Stora Gatan 23', 'Västerås, , 721 80', and 'SE'. There are also fields for 'UPS Origin' and 'UPS Destination', both of which are empty. At the bottom left, there is a UPS logo and the text 'Brought to you by UPS.'. At the bottom right, there is a 'Done' button.

The UPS Time in Transit window displays the selected items, the Ship From and Ship To codes, and the number of business days in transit.

2. Click Done to close the window.

Validating Addresses

The UPS Address Validation window validates the Ship From and Ship To address postal codes for a delivery line and matches it against UPS address information. Matches are ranked using a quality rating system with 1.000 being the closest (highest) match.

To validate an address:

1. Navigate to the [UPS Address Validation](#) window.

Figure 10–5 UPS Address Validation Window

Line	LPN	Identifier/Name	Item	Ship-From Validation (Candidates, Best)	Ship-To Validation (Candidates, Best)
645	AS54888			Error	Error

Ship-From:

Ship-To:

Address Candidates

Ship-From | **Ship-To**

Error:

Brought to you by UPS.

The top half of the window displays the results of the validation such as the number of address candidates and the accuracy of the validation.

The lower half of the window displays a ranking of matches from highest to lowest for the Ship From and Ship To addresses.

2. Click Done.

Reports, Documents, and Processes

Topics covered in this chapter include the following:

- [Overview of Reports, Documents, and Processes](#) on page 11-2
- [Backorder Detail Report](#) on page 11-3
- [Backorder Summary Report](#) on page 11-5
- [Open Deliveries Report](#) on page 11-6
- [Shipped Delivery Lines Report](#) on page 11-7
- [Bill of Lading](#) on page 11-10
- [Master Bill of Lading Report](#) on page 11-11
- [Commercial Invoice Report](#) on page 11-12
- [Packing Slip Report](#) on page 11-13
- [International Trade Management Reports and Processes](#) on page 11-15
- [Mailing Label Report](#) on page 11-18
- [Pick Slip Report](#) on page 11-19
- [Shipping Exceptions Report](#) on page 11-22
- [Auto Ship Confirm Report](#) on page 11-24
- [Auto-pack Report](#) on page 11-25
- [Vehicle Load Sheet Details Report](#) on page 11-27
- [Vehicle Load Sheet Summary](#) on page 11-28
- [Location to Region Mapping Concurrent Process](#) on page 11-29
- [Regions Interface Concurrent Process](#) on page 11-30

Overview of Reports, Documents, and Processes

Shipping Execution provides you with a variety of flexible and easy-to-use reports to help you improve productivity and increase control. Text attachments can be used with reports and documents to print shipping application data: for example, unpacking instructions entered on a delivery line can be printed on the Packing Slip.

Backorder Detail Report

The Backorder Detail Report prints details about backordered items for your organization and displays the information based on the report parameters.

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 the following parameters for you to enter. If you leave any of the non-required parameters blank, this report includes all orders that meet your other parameter criteria.

- Source System: Select the source system where the line has been imported to Shipping. This is a mandatory field.
- Warehouse: Optionally, select the warehouse containing the backordered picking line items you want printed in this report.
- Item: Optionally, select the item you want printed in this report.
- Item Category Set: Optionally, select the item category set you want printed in this report. If you make a selection for this parameter, select a specific item category.
- Item Category: Optionally, select the item category you want printed in this report. This field is available when Item Category Set is entered.
- Customer: Optionally, select a customer name.
- Source Header Type: Optionally, select an order source type. If this option is selected, Source Header Number From and To fields will become available.
- Source Header Number From: Optionally, select the source header number (based on the Source Header Type option) that you want to report from.
- Source Header Number To: Optionally, select the source header number (based on the Source Header Type option) that you want to report to.
- Item Display: Optionally, select one of the following as the Item Display:
 - Both: Print both item description and flexfield
 - Description: Print item description only

- Flexfield: Print item flexfield only
- Created By: Optionally, select the name of the person that created the delivery detail.
- Ship To Country: Optionally, select the ship to country.
- Sort By: Optionally, select one of the following to sort the report by:
 - Customer (default)
 - Order Number
 - Warehouse

Backorder Summary Report

The Backorder Summary Report prints a list of all unshipped orders and includes only open orders in an order cycle that includes pick release. Multiple items and their back ordered summary lines are displayed on the same page. It displays order information such as the order type, range of order numbers and move orders included in the report, warehouse, last shipped date, monetary amounts ordered, and the number of items outstanding and shipped. 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.
- Sales Order Number (Low/High): Select the order number(s) that you want printed in this report.

Note: You must select a transaction type before entering a sales order number(s).

- 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.

Open Deliveries Report

Use the Open Deliveries Report to view deliveries that you have not recorded as ship-confirmed or shipped. You can also view open deliveries in the Shipping Transactions form.

Use it as:

- A daily list of deliveries that need processing and need ship-confirm
- A list of all deliveries that need processing and need ship-confirm
- A list of the customer orders that the warehouse is processing
- A list of pending orders that need processing at the end of a fiscal period to recognize revenue
- A list of deliveries with assigned lines that you need to lock in (status Planned)
- A list of deliveries that you may need to close

Submission

In the Shipping Reports and Documents window, select Open Deliveries Report in the Name field.

Do not add this report to a document set.

Parameters

Batch Name: A picking batch.

Customer Name

Creation Date(Low) and Creation Date(High): Enter only a range of dates. The report shows deliveries from 00:00:00 of the from date to 23:59:59 of the to date.

Item Display is required:

- Description: The report shows the item descriptions. This is the default.
- Flexfields: The report shows the item flexfield data. Some information may appear truncated.
- Both: The report shows the item descriptions and the item flexfield data. Some flexfield information may appear truncated.

Warehouse (required): If a value initially appears, it is from the PO: MFG Organization ID profile option.

Ship Method

Ship To

Sort Order is required:

- Delivery: Delivery ascending; within Delivery, Source Ref. Number ascending.
- Creation Date: Creation Date ascending/descending; within Delivery, Source Ref. Number ascending.
- Shipment Priority: Shipment Priority ascending/descending; within Delivery, Source Ref. Number ascending.
- Batch Name: Batch Name ascending/descending; within Delivery, Source Ref. Number ascending.
- Ship Method: Ship Method ascending/descending; within Delivery, Source Ref. Number ascending.

Shipped Delivery Lines Report

Use the Shipped Delivery Lines report to display all delivery lines that have been shipped. This report includes each shipped delivery line that satisfies your parameter criteria. With this report you can also print totals for the released and shipped quantities and the number of delivery lines that meet your parameter criteria.

The report will generate a released number that is greater than the shipped number in order to compare released versus shipped quantities. This typically occurs when an order has been partially backordered. For example, you have order number 590221 for 10 each of item AS33490. A backorder of 6 occurs. The Shipped Delivery Lines Report would display the following:

Order 590221

Line 1.1 quantity released 10 quantity shipped 4

Line 1.2 quantity released 10 quantity shipped 6

Total: Released 20 Shipped 10

Using this report, you can print information relative to all the delivery lines that have passed the ship confirm process (status: "Shipped") like order number, released, and shipped quantity, and so on. Delivery lines are selected based on the parameters used to generate the report.

You can use this report in several ways, including the following:

- A management report at the month end and quarter end for Accounts Receivables to assure that all shipments had completed and Auto Invoiced.
- As a tool to identify possible re-calls or to identify the customers that a particular item has been sent to.
- A management report by distribution management to compare the items that were released and shipped for a particular time period. It helps in determining picking and shipping performance metrics.

Submission

Submission parameters are displayed on the cover page and critical parameters are repeated on the other pages. The report has two breaks by level. These are: Operating Unit and Ship From Organization. There is a page break at each new Operating Unit, Ship From organization. Within these, delivery lines appear as a simple list, change of page is made when the maximum possible lines per page are reached.

Parameters

- Ship From Organization: This required parameter indicates the ship from organization on the delivery lines that are selected for printing.
- Source System: Optionally, select delivery lines to be printed based on a particular source system.
- Source Type: Select a Source Type if you selected a Source System.
- Source Number From/Source Number To: You can specify a Source Number From and a Source Number To if you selected a Source Type.
- Delivery From/Delivery To: Optionally, select delivery lines to be printed based on a range of deliveries.
- Item: Optionally, select the Item to be reported.
- Item Display: This required parameter indicates how to print the item related information on the report. The possible values are:
 - Item Description: Print the item description only.
 - Item FlexField: Print the item flexfield only.
 - Both: Print the item description and flexfield.
- Customer From/Customer To: Optionally, select delivery lines to be printed based on a range of customers.

- Ship Date From/Ship Date To: Optionally, select the range of shipping dates on delivery lines that are printed.
- Ship method: Optionally, select delivery lines to be printed based on a particular ship method.
- Sort By 1, Sort By 2, Sort By 3: You can sort this report based on three sorting criteria. Possible sorting criteria include the following:
 - Customer name
 - Delivery
 - Item
 - Ship Date
 - Ship Method

Note: The Operating Unit and Ship From Organization are major criteria of sorting. For example, if you select Sort By 1 = Customer, Sort By 2 = Ship Date, and Sort By 3 = Delivery, the report will be sorted by Operating Unit, Ship From Organization, Customers, By Ship Date within the Customers, and by Delivery within the Ship Dates.

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 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.

- Warehouse: Select the warehouse for which you want the report printed.
- Delivery Date (Low and High): Enter the range of delivery dates to be included 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.

Master Bill of Lading Report

The master bill of lading is a record of the physical bills of lading and prints, on preprinted forms, the ship confirmed deliveries for a trip. It includes shipment date, origin, final destination, stop off points, container description, and trailer weight.

The Master Bill of Lading report shows information when a trip has multiple deliveries from the origin to a common drop off point. It can be printed for a single delivery as long as there are deliveries in the trip.

Submission

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

Parameters

- Trip Date (Low): Optionally, enter the range of delivery dates to be included in the shipping report.
- Trip Date (High): Optionally, enter the range of delivery dates to be included in the shipping report.
- Trip Name: Select the trip you want printed in this shipping report. This field is required.
- Ship From: Select the location where the shipment is originating. This field is Required.
- Ship To: Select the location where the shipment will be delivered. This field is Required.

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, 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. Country of origin is for future use.

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.

- Trip Stop: Select the trip stop code.
- Stop Planned Depart Date (Low and High): Enter the range of departure dates for the trip(s) and/or delivery(s) to be printed in this report. 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.
- Warehouse: Select the warehouse for which you want the report printed.
- 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: Select if you want customer item information included in the document.

Packing Slip Report

The Global Packing Slip Report lists the goods that are in transit and is used to show that the goods do not belong to the carrier. The goods transported can be from sales orders, internal sales orders or transfers, and project contract lines. In some countries, the packing slip is optional while in others, it is required.

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 weight, 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.

Some of the following changes have been introduced to the pack slip layout and format:

- The contact names for Ship To and Bill To addresses are included in the Ship To and Bill To addresses in the *Attn:* line below the respective addresses (Bill To and Ship To). The Order Number appears in the Item Number row.
- The back ordered quantity is included as part of the Total Unshipped Quantity and appears separately in the Unshipped Quantity column.
- The unshipped quantity includes the quantity not shipped plus the back ordered quantity for a delivery. The quantity for Unshipped Details appears in the Unshipped Details column at the bottom of the report. You can choose to display or not display the Unshipped Details in the Packing Slip Report by selecting *Yes* or *No* in the Display Unshipped Items field in the set-up parameters for this report.
- Shipping and packing instructions entered for an order line display on the report.
- Country names appear in the last line of the address: Ship From address, Ship to address and Bill To addresses.

You can select the following options when generating a Packing Slip Report such as cancelling, editing, re-printing, sorting, and sequencing 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 cannot be printed from a third-party warehouse instance. The Packing Slip Report requires Bill to Location information that is stored in Order Management Order Lines and not in Shipping Delivery Details. This information cannot be transmitted from the supplier instance to the third party instance.

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.

- Warehouse: Select the warehouse for the report.
- Delivery Name: Select the name of the delivery for which you want to run the report.
- Print Customer Item: Select if you want the customer item names printed on the 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.
- 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 separate packing slips (a report for each container), a single consolidated packing slip (for all containers), or both separate and consolidated packing slips.
- Sort by: You can sort by Customer Item Number or Inventory Item Number.
- Delivery Date (Low and High): Enter the range of dates for the trip(s)/delivery(s) to be included in your report.
- Display Unshipped Items: Select if you want to list unshipped items on the packing slip.

International Trade Management Reports and Processes

If your current responsibility does not enable you to navigate to International Trade Management Reports and Processes, change responsibility to ITM Adapter Super User responsibility.

ITM Adapter Status Report

Use the ITM Adapter Status Report to view the status of the ITM Adapter and a summary of the errors encountered during the ITM Adapter processing. This report displays the current status of the adapter; the number of unprocessed requests; and error information for each unprocessed request (partner, error type, error code, and interpreted value).

The adapter statuses are:

- Start: Start up signal received
- Active: Adapter is running
- Stop: Shut down signal received
- ShutDown: Shut down in progress
- Inactive: Adapter is inactive

Submission

Navigate to the ITM Adapter Status Report form and click Submit.

Parameters

- Service Provider: International Trade Management (ITM) partner application
- Application: Oracle Order Management
- Master Organization: Inventory Master Organization. When this parameter is selected only the requests submitted by this master organization would be considered
- Organization: Select the organization (warehouse) that you want to view the status of transmitted orders.
- Application User: Any Oracle Applications user

Skip Screening

After analyzing the Adapter Status Report, run this concurrent process to skip adapter screening (override--set Result Status to OVERRIDE) for certain requests

and maintain the workflow activity. Then, you correct the errors and submit the request again. You can override unprocessed records and records that have system and data errors.

The process only calls your request set custom processing logic if it has overridden all the records in a request set.

Submission

Navigate to the Skip Screening form, enter parameters in the Parameters window, click OK, and click Submit.

Parameters

Application: Oracle Order Management

Override Type: This indicates what kind of requests you want to override

Reference Number: Order number

Reference Line Number: Order line number

Error Type: Defined in the Response Error Classification form

Error Code: Defined in the Response Error Classification form

Vendor: International Trade Management (ITM) Partner Application

Party Type: This will be Bill-To, Ship-To

Party Name

Resubmit Errored Requests

After analyzing the Adapter Status Report, run this concurrent process to resubmit requests to the ITM Adapter. You can resubmit records that have system and data errors.

Submission

Navigate to the Resubmit Errored Requests form, enter parameters in the Parameters window based on the Adapter Status Report, click OK, and click Submit.

Parameters

Application: Oracle Order Management

Resubmit Type: This indicates what kind of errored requests you would like to resubmit. This parameter can have values System or Data. If System is selected, all the errored requests whose classification is defined as System will be resubmitted. Classification of an error as SYSTEM/DATA is done in the ITM Response Error Classification form.

Reference Number: Order number

Reference Line Number: Order line number

Error Type: Defined in the Response Error Classification form

Error Code: Defined in the Response Error Classification form

Vendor: International Trade Management (ITM) Partner Application

Party Type: This will be Bill-To, Ship-To

Party Name

StartUp ITM Adapter

This process starts the Oracle Adapter. It sets the adapter status to Start. A successful shutdown sets the adapter status to Active and the concurrent process status to Inactive. The process issues a warning if an Adapter is already running.

Submission

Navigate to the Adapter Startup form and click Submit.

Parameters

None

ShutDown ITM Adapter

This process stops the Oracle Adapter. It sets the adapter status to Stop. A successful shutdown sets the adapter status to Inactive and the concurrent process status to Inactive.

Submission

Navigate to the Adapter Shutdown form and click Submit.

Parameters

None

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 delivery and trip information is available, it also appears on the mailing label, for example, customer name, ship to address, carrier name, waybill number, number of packages in the shipment, delivery number, container number, order number, and tracking number.

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.

- Trip Stop: Select the trip stop for which you want labels printed.
- Stop Planned Depart Date (Low and High): Enter the range of dates containing the delivery/deliveries for which labels are printed.
- Freight Carrier: Select the freight carrier for the report you want to print.
- Warehouse: Select the warehouse for the report.
- Delivery Name: Select the delivery name for which you want labels printed.
- LPN: Select the LPN for which you want labels printed.

Pick Slip Report

The Pick Slip Report prints all picking line details in a picking batch. This report is used by the picker in the warehouse to collect all items included in shipments.

The pick slip displays the following sections:

- Pick slip header: Lists report date, warehouse, pick slip number, and pick batch number.
- Release criteria: Lists pick slip grouping rule name and criteria used in grouping the pick slip such as customer, ship-to address, delivery name, trip stop address, order number, shipment priority, carrier, subinventory, and requisition number.

Note: The criteria defined on the selected pick slip grouping rule displays on the pick slip. For example, customer name and carrier display on the pick slip if the pick slip grouping rule with this criteria is selected for pick release.

- Pick slip list: The Pick Slip lists each item as well as the line number, unit of measure, quantity requested, quantity shipped, sales order number, sales order line, ship set, trip, delivery, lot number, serial number from, serial number to, revision, pick from location, and whether the item is required for shipment. The requested quantity shows the total quantity; for example, if you split a staged line for 15 into two lines of 10 and 5 (using the Shipping Transactions form), the quantity requested for the item shows as 15. The shipped quantity is for picker entry and is always zero unless a portion of the batch was already picked in a separate instance. (Pick release partial, Ship Confirm and re-run Pick release).

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.

The Pick Slip displays separately the quantity of items picked from various lots: the Transaction Quantity from each lot displays separately under Quantity.

- Shipping notes: Lists any associated shipping notes.

Submission

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

Parameters

When you request a Pick Slip Report, Shipping Execution provides you with the following parameters:

- Pick Slip Number (Low/High): Select the range of pick slip numbers to be included on the report.
- Sales Order Type: Select the sales order type to be included in the report.
- Sales Order Number (Low/High): Select the range of sales order numbers to be included on the report.
- Move Order Number (Low/High): Select the range of move order numbers to be included on the report.
- Freight Carrier: Select the freight carrier for the report you want printed.
- Warehouse: Select the warehouse for which you want the report printed.
- Customer: Select the customer for which you want the pick slip number printed.
- Line Status: Select the status of the delivery lines: All, Picked, or Un-picked.
- Detailing Date (Low/High): Enter a date range that for the detailed lines.
- Item Display: Select an item display: Description, Flexfield, or Both.

Note: The document set named Pick Slip Report can be utilized to print the Pick Slip report. If the Shipping parameter Print Pick Slip is set to Immediate, the Pick Slip report should be added to the Pick Slip Report document set. If the parameter Print Pick Slip is set to At the End, you can optionally add the report to the document set. If you choose to add it, you should remove the report from the standard document set to avoid duplicate printing of the report.

This seeded document set should not include any report except for the Pick Slip report, otherwise the report will be ignored.

Shipping Exceptions Report

The Shipping Exceptions Report provides all the exception details of Backorders and Holds from Shipping Execution. You can print this report by running it through either SRS or during Pick Release processing.

For more information on defining shipping exceptions, see Shipping Execution Setup, Defining Shipping Exceptions in *Oracle Order Management Suite Implementation Manual*.

Submission

Once you have submitted the report (for example, after it is run as part of a document set at pick release), go to the View menu and select Requests to display the Find Requests window. Click Find to find the requests. The requests are displayed in the Requests window. Select your request and click View Output to view the Shipping Exception report.

Parameters

When you request a Shipping Exception Report, Shipping Execution provides you with the following parameters:

- Exception Name: Identifies the exception encountered in processing. The pre-defined (seeded) exception names are:
 - WSH_BATCH_MESSAGE: Logged to store the messages generated during the automated shipping processes such as auto-pack and ship-confirm.
 - WSH_PICK_BACKORDER: Backorder occurred at picking time.
 - WSH_PICK_HOLD: Hold on the line at picking time.
 - WSH_INVALID_PACKING: Items should be unpacked from the container.
 - WSH_INVALID_DELIVERY_PLANNING: Planned delivery has changes
 - WSH_INVALID_PACKING_PLANNING: Planned packing has changes.
 - WSH_UNPACK_ITEM: Packing Exception.
 - WSH_CUSTOMER_MERGE_CHANGE: Change to delivery detail due to customer merge.
 - WSH_CHANGED_QUANTITY: Change in shipping requested quantity due to change in order quantity.
 - WSH_CHANGED_SHIP_METHOD: BOL Number cancelled due to a change in the ship method of the trip.

- WSH_CHANGE_DEL_GROUP: Changes in one or more delivery grouping attributes.
- WSH_CHANGE_SCHEDULE: Changes in one or more scheduling attributes.
- WSH_CHANGE_SCHED_DATE: Scheduled date has been postponed.
- WSH_INV_EXPECTED_ERROR: Logged from pick release when Inventory returns an error.
- WSH_PICK_PRIOR_RSV: Logged against the delivery lines if Prior Reservations is specified during Pick Release but quantity is not reserved or Ship Set or Ship Model Complete line is partially reserved.
- WSH_UNPACK_ITEM: Logged if delivery detail changed after line is packed.

- Request ID: Identifies the exception request.
- Logging Entity: Displays exceptions for a selected log-on entity: shipper, receiver, or transportation carrier.
- Exception Location Name: Identifies the location where the shipping exception occurred.
- Ship From Location Name: Identifies the location where the exception report was run (logged location may be different from where the shipping exception occurred).
- Creation Date From/To: Identifies the range of creation dates for exceptions in the report.
- Last Update Date From/To: Identifies the range of update dates for exceptions in the report.
- Severity:
 - Low (Low Impact Exception): You receive a warning but is able to complete operation.
 - Medium (Medium Impact Exception): Operation cannot be completed without handling the exception.
 - High (High Impact Exception): Operation cannot be completed without handling the exception.
- Status: Describes the current status of the exception:

Open: Initial status—not yet associated with an exception name.

Manual: This exception needs to be processed manually.

No Action Required: No handling required for this exception.

Not Handled: This exception could not be handled.

Logged: This exception is logged with appropriate exception name or you assign the appropriate exception name to an OPEN exception.

In Process: The workflow process has been started for this exception.

Error: Error exception handling failed.

Closed: Exception handling was completed successfully.

- Trip From/To: Identifies the range of trip IDs included in the report.
- Delivery From/To: Identifies the range of delivery IDs in the report.
- Move Order Number: Displays the sort criteria for the report.

Auto Ship Confirm Report

The Auto Ship Confirm Report is designed to provide visibility to batches that have been successfully ship confirmed by Auto Ship Confirm concurrent program.

Submission

In the Shipping Reports and Documents window, select Auto Ship Confirm Report in the Name field.

Note: This report can be automatically generated as a result of ship confirmation.

Parameters

When you request a Auto Ship Confirm Report, Shipping Execution provides you with the following parameters:

- Ship Confirm Batch: Select the Ship Confirm Batch from this required field.
- Ship Confirm Rule: Optionally, select a Ship Confirm Rule.
- Delivery From/Delivery To: Optionally, select the range of deliveries to be queried.

- Bill of Lading From/Bill of Lading To: Optionally, select the range of bill of ladings to be queried.
- Customer: Optionally, select a customer.
- Ship From Address/Ship To Address: Optionally, select a ship from and ship to address.
- Pick-up Date From/Pick-up Date To: Optionally, select a pick up date range for the query.
- Drop-off Date From/Drop-off Date To: Optionally, select a drop off date range for the query.
- Planned: Optionally, select a planned status to query the deliveries.
- Ship Method: Optionally, select a shipping method for the query.
- Pick Release Batch: Optionally, select a pick release batch for the query.
- Exceptions Only: Optionally, select whether or not you want to have only exceptions reported in this query.

Auto-pack Report

The Auto-pack Report is designed to provide visibility to batches that have been successfully packed by the Auto Pack concurrent program.

Submission

In the Shipping Reports and Documents window, select Auto-pack Report in the Name field.

Note: This report can be automatically generated as a result of the Auto Pack concurrent process.

Parameters

When you request a Auto-pack Report, Shipping Execution provides you with the following parameters:

- Auto-pack Batch: Select the Auto-pack Batch from this required field.
- Delivery From/Delivery To: Optionally, select the range of deliveries to be queried.

- BOL From/BOL To: Optionally, select the range of bill of ladings to be queried.
- Customer: Optionally, select a customer.
- Ship From/Ship To: Optionally, select a ship from and ship to address.
- Pick-up Date From/Pick-up Date To: Optionally, select a pick up date range for the query.
- Drop-off Date From/Drop-off Date To: Optionally, select a drop off date range for the query.
- Planned: Optionally, select a planned status to query the deliveries.
- Ship Method: Optionally, select a shipping method for the query.
- Pick Release Batch: Optionally, select a pick release batch for the query.
- Exceptions Only: Optionally, select whether or not you want to have only exceptions reported in this query.

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, you are required to select the Trip to be printed.

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: report name, report date, and the trip number.

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 to be printed in this document.

Location to Region Mapping Concurrent Process

Location to Region Mapping Concurrent Process processes locations (addresses) and submits a report of location data that cannot be matched to existing regions. Optionally, it can insert new region data into the regions interface table.

Submission

Navigate to the Shipping Interfaces form. If the process is not listed in the Name list of values, have your system administrator add it to the All Shipping Interfaces request group.

Parameters

- Trip Stop: Choose a stop.
- Insert Flag: Yes
- Number of Regions to Process: Enter a suitable number. The concurrent process processes the bulk information in this many batches.
- Location Start Date and Location End Dates: The concurrent process maps locations from the starting date to the ending date.

Regions Interface Concurrent Process

Use this process to load bulk geographical information from the regions interface table to Oracle Shipping Execution. This enables you to filter the data that you are loading so that you can repeat the process without loading all of the geographical information each time. The filters are country, country code, province/state, city, city code, and postal code.

Submission

Navigate to the Regions Interface form and, after verifying the correctness of the data, click Load All Regions. If the process does not start, have your system administrator add it to the All Shipping Interfaces request group.

Parameters

None

Ship Confirm Deliveries SRS

Ship Confirm Deliveries SRS enables you to utilize the Auto Ship Confirm functionality within Oracle Shipping Execution. This functionality is detailed within the topic [Executing the Auto Ship Confirm Process Concurrently](#) on page 9-14.

Interface Trip Stop SRS

The Interface Trip Stop-SRS process runs the interface to update Order Management sales order lines, Departure Ship Notice Outbound (DSNO) generation, and inventory. This functionality is detailed within the topic [Interface Trip Stop-SRS](#) on page 9-16.

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.

Windows and Navigator Paths

Overview

This appendix shows the default navigator path for each Oracle Shipping Execution window. Refer to this appendix when you do not already know the path for windows you want to use.

Text in brackets ([]) indicates a button.

These abbreviations refer you to other Oracle Applications documentation:

- BOM: *Oracle Bills of Material User's Guide*
- Flex: *Oracle Applications Flexfields Guide*
- INV: *Oracle Inventory User's Guide*
- ONT: *Oracle Order Management User's Guide*
- SYS: *Oracle System Administrator's Guide*
- User: *Oracle Applications User's Guide*

Windows and Navigator Paths

Window	Navigator Menu Path
Account Generator Processes	Order Management > Shipping > Setup > Flexfields > Key > Accounts
Adapter Startup	ITM Adapter > Administration > Adapter Startup
Adapter Shutdown	ITM Adapter > Administration > Adapter Shutdown
Assign Calendars	Order Management > Shipping > Setup > Calendars > Assign

Window	Navigator Menu Path
Assign Security Rules	Order Management > Shipping > Setup > Flexfields > Descriptive > Security > Assign > Find Descriptive Flexfield Segment [Find]
Auto-Pack Deliveries SRS	Order Management > Shipping > Auto-Pack Deliveries SRS
Defaulting Setup-Entity Attributes (<i>See</i> ONT)	Setup > Rules > Defaulting
Calendar	<i>See</i> Assign Calendar and Workday Calendar
Carriers	Order Management > Shipping > Setup > Freight Carriers, Cost Types > Freight Carriers
Choose Document and Label Printers	Order Management > Shipping > Setup > Documents > Choose Printers
Container-Item Relationships	Order Management > Shipping > Setup > Container Load Details > Organizations > [OK]
Create LPNs	Order Management > Shipping > Transactions > Data Entry > LPN Data Entry > Create LPNs
Cross-Validation Rules	Order Management > Shipping > Setup > Flexfields > Key > Rules
Define Security Rules	Order Management > Shipping > Setup > Flexfields > Validation > Security > Define > Find Value Set [Find]
Define Shipping Exceptions	Shipping > Setup > Define Exceptions
Delivery	Order Management > Shipping > Transactions > Data Entry (folder) > Delivery Data Entry (folder)
Descriptive Flexfield Segments	Order Management > Shipping > Setup > Flexfields > Descriptive > Segments
Document Categories	Order Management > Shipping > Setup > Documents > Document Categories - Summary > [New]
Document Categories-Summary	Order Management > Shipping > Setup > Documents > Document Categories
Document Sequences	Order Management > Shipping > Setup > Documents > Document Sequences
Find a Role Definition	Order Management > Shipping > Setup > Grants & Role Definitions > Define Roles > Shipping Execution Role Definition > [Find]
Find Container-Item Relationships	Order Management > Shipping > Setup > Container Load Details > [Find]
Find Exceptions	Order Management > Shipping > Exceptions > [Find]

Window	Navigator Menu Path
Find Grants	Order Management > Shipping > Setup > Grants & Role Definitions > Grants > Shipping Execution Grants > [Find]
Find Key Flexfield Segment	Order Management > Shipping > Setup > Flexfields > Key > Values
Find Personal Profile Values (<i>See</i> SYS)	Order Management > Shipping > Setup > Profiles
Flexfield Qualifiers (<i>See</i> Flex)	Order Management > Shipping > Setup > Flexfields
Freight Carriers	Order Management > Shipping > Setup > Freight Carriers, Cost Types > Freight Carriers >
Freight Costs	Order Management > Shipping > Transactions > [Actions]
Freight Cost Types	Order Management > Shipping > Setup > Freight Carriers, Cost Types > Define Freight Cost Types
Interfaces	<i>See</i> Shipping Interfaces
Inter-Org Shipping Methods	Order Management > Shipping > Setup > Regions and Zones > Transit Times
ITM Adapter Status Report	ITM Adapter > Administration > ITM Adapter Status Report
ITM Application Users	ITM Adapter > Setup > ITM Users
ITM Error Classification	ITM Adapter > Setup > ITM Response Error Classification
ITM Parameter Setup	ITM Adapter > Setup > ITM Parameters
ITM Partners	ITM Adapter > Setup > ITM Partners
ITM Partner Service Types	ITM Adapter > Setup > ITM Service Types
ITM Service Parameters	ITM Adapter > Setup > ITM Partners > Service Parameters
Log Exceptions	Order Management > Shipping > Exceptions > [New]
Lookups	Order Management > Shipping > Setup > Lookups
Oracle Shipping Lookups	Order Management > Shipping > Setup > Lookups
Oracle Shipping Lookups	ITM Adapter > Setup > Shipping Lookups
Organization Assignments	Order Management > Shipping > Setup > Freight Carriers, Cost Types > Freight Carriers > Service tabbed region > Organization Assignments

Window	Navigator Menu Path
Organization Parameters (See INV)	Order Management > Shipping > Setup > Organization Parameters
Packing Workbench	Order Management > Shipping > Transactions > [LPNs] > [Actions]
Personal Profile Values (See SYS)	Order Management > Shipping > Setup > Profiles > Find Personal Profile Values [Find]
Pick Release	Order Management > Shipping > Release Sales Orders > Release Sales Orders SRS
Pick Slip Grouping Rules	Order Management > Shipping > Setup > Picking > Define Pick Slip Grouping Rules
Query Manager	Order Management > Shipping > Transactions [After the query is performed, the results display in the Shipping Transactions window.] Note: To perform a query from the Shipping Transactions window: Shipping Transactions window > [Flashlight icon]
QuickCodes (ITEM_ TYPE) (See INV)	Setup > QuickCodes
Regions Interface	Order Management > Shipping > Setup > Regions and Zones > Regions Interface
Release Rules	Order Management > Shipping > Setup > Picking > Define Release Rules Form
Release Sales Orders For Picking	Order Management > Shipping > Release Sales Orders > Release Sales Orders
Release Sequence Rules	Order Management > Shipping > Setup > Picking > Define Release Sequence Rules
Requests (See User)	Order Management > Shipping > Requests > Find Requests [Find]
Resolve/ Purge Exceptions Parameters	Order Management > Shipping > Exceptions > [Tools] > Resolve/Purge Exceptions
Resubmit Errored Requests	ITM Adapter > Administration > Resubmit Errored Requests
Rollup Groups	Order Management > Shipping > Setup > Flexfields > Key > Groups> Find Key Flexfield Segment [Find]
Segment Values	Order Management > Shipping > Setup > Flexfields > Validation > Values > Find Value Set [Find]
Sequence Assignments	Order Management > Shipping > Setup > Documents > Assign Sequences
Ship Confirm Deliveries SRS	Order Management > Shipping > Auto Ship confirm Deliveries SRS
Ship Confirm Rules	Order Management > Shipping > Setup > Auto Ship Confirm Rules
Ship Method Lookups	Inventory > Setup > Organizations > Shipping Methods
Shipping Document Sets	Order Management > Shipping > Setup > Documents > Document Sets

Window	Navigator Menu Path
Shipping Execution Grants	Order Management > Shipping > Setup > Grants and Role Definitions > Grants
Shipping Execution Role Definition	Order Management > Shipping > Setup > Grants and Role Definitions > Define Roles
Shipping Interfaces	Order Management > Shipping > Interfaces > Run > Submit a New Request > [OK]
Shipping Parameters	Order Management > Shipping > Setup > Shipping Parameters
Shipping Reports and Documents	Order Management > Shipping > Reports and Documents > Submit a New Request > [OK]
Shipping Transactions	Order Management > Shipping > Transactions > Query Manager [Do a search in the Query Manager window. The search results display in the Shipping Transactions window.]
Shorthand Aliases (<i>See Flex</i>)	Order Management > Shipping > Setup > Flexfields > Key > Aliases
Skip Screening	ITM Adapter > Administration > Skip Screening
Stop	Order Management > Shipping > Transactions > Data Entry > Stop Data Entry > [Detail]
Submit Request	Order Management > Shipping > Reports and Documents > Submit a New Request > [OK]
Trip	Order Management > Shipping > Transactions > Data Entry > Trip Data Entry > [Detail]
UPS Address Validation	Order Management > Shipping > Transactions > [Actions]
UPS Rate and Service Selection	Order Management > Shipping > Transactions > [Actions]
UPS Time in Transit	Order Management > Shipping > Transactions > [Actions]
UPS Tracking Summary	Order Management > Shipping > Transactions > [Actions]
Value Sets	Order Management > Shipping > Setup > Flexfields > Validation > Sets
View Exceptions	Order Management > Shipping > Exceptions
View Shipping Status	Order Management > Shipping > Transactions > <query the delivery > Actions > View Shipping Status
Workday Calendar (<i>See BOM</i>)	Order Management > Shipping > Setup > Calendars > Enter

Glossary

C

call out

A site-specific customization independent of a Trading Partner.

capable to deliver

CTD (Capable to Deliver) refers to considering the transportation resources and transportation lead time to meet your customers delivery needs. In this release, only transportation lead time is being considered. Transportation resources will be added in a future release.

P

Package level tags

Package level tags can appear anywhere after a “CREATE OR REPLACE” statement and before any uncommented package contents, including variables, program units, etc. For example,

```
--<TPA_LAYER=layer name>
```

indicates that the package belongs to the specified Trading Partner Layer.

Program Unit

Any packaged PL/SQL procedure or function.

Program Unit Level Tags

Program unit level tags must appear immediately after keyword 'IS'.

```
TPS Program Unit: --<TPA_TPS>
```

Public Program Unit

Those program units published as customizable by Oracle Development teams. Layers can be built only on those program units that are designated by an Oracle Development team as public. These may also be referred to as published or customizable program units.

S

subinventory

Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom or receiving dock.

T

TPA metadata file

Contains information extracted from the TPA repository about TPA enabled program units and layers built on top of them. This file is used to ship the TPA registry, or repository, and merge layers at the customer site. This file must be shipped with any patch that contains TPA enabled program units.

TPA package

The package containing TPA program units. This package is always generated from the TPA repository.

TPA program unit

The mirror program unit for a public program unit. For every public program unit, Oracle developers will designate a TPA program unit. TPA program units are generated by the architecture to insulate generic code from custom code. All calls to customizable generic code and custom code are made through the TPA program unit.

TPA repository

The registry which stores data required for the functioning of the Trading Partner Architecture. It includes information about public program units, TPA program units, TPS program units and complete definition of the layers including the Oracle Base Layer.

TPA tag

One-line hyphen comments which appear at the beginning of a new line and provide information about customizable program units within Oracle code. The syntax for a TPA tag is:

```
--<tag name=tag value>
```

For example, a label is specified as follows,

```
--<TPA_LABEL=label>
```

Trading Partner Architecture (TPA)

The framework that supports PL/SQL based layer development and deployment.

trading partner flexfield

Descriptive flexfields reserved on several base tables for capturing additional attributes applicable to specific trading partners. They are provided for most of the base tables in Oracle Release Management, Shipping, and Order Management.

trading partner layer

The trading partner specific code created to replace Base Layer code. The layer consists of a set of PL/SQL program units that perform trading partner specific processing or validations in place of the generic code provided by Oracle Development.

Layer Providers develop this code and populate the Trading Partner Layers by importing the trading partner specific code into the TPA repository. In this way, Layer Providers can develop Trading Partner Layers composed of trading partner specific code for various trading partners.

Trading Partner Selector (TPS)

A program unit which accepts context information for the business transaction and derives trading partner entities being processed in the current transaction instance.

All TPS Program units must have the following five output (OUT/IN OUT) arguments:

Name	Argument
Trading Partner Group Code	x_tp_group_code
Customer Number	x_customer_number
Ship To EDI Location Code	x_ship_to_ece_locn_code

Name	Argument
Intermediate Ship To EDI Location Code	x_inter_ship_to_ece_locn_code
Bill To EDI Location Code	x_bill_to_ece_locn_code

trip planning stop

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.

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