



PeopleSoft EnterpriseOne Warehouse Management 8.11 PeopleBook

November 2004

PeopleSoft EnterpriseOne Warehouse Management 8.11 PeopleBook

SKU E1_FMS8.11AWM-B 1104

Copyright © 2004 PeopleSoft, Inc. All rights reserved.

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc. ("PeopleSoft"), protected by copyright laws and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this document is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this document, including the disclosure thereof.

PeopleSoft, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, PeopleTalk, and Vantive are registered trademarks, and Pure Internet Architecture, Intelligent Context Manager, and The Real-Time Enterprise are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners. The information contained herein is subject to change without notice.

Open Source Disclosure

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright (c) 1999-2000 The Apache Software Foundation. All rights reserved. THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

PeopleSoft takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation.

Contents

General Preface

About This PeopleBook Preface	xv
PeopleSoft Application Prerequisites.....	xv
PeopleSoft Application Fundamentals.....	xv
Documentation Updates and Printed Documentation.....	xvi
Obtaining Documentation Updates.....	xvi
Ordering Printed Documentation.....	xvi
Additional Resources.....	xvii
Typographical Conventions and Visual Cues.....	xviii
Typographical Conventions.....	xviii
Visual Cues.....	xix
Country, Region, and Industry Identifiers.....	xix
Currency Codes.....	xx
Comments and Suggestions.....	xx
Common Elements Used in PeopleBooks	xx

Preface

PeopleSoft EnterpriseOne Warehouse Management Preface.....	xxiii
PeopleSoft Application Fundamentals	xxiii
Pages With Deferred Processing.....	xxiii
About These PeopleBooks	xxiv

Chapter 1

Getting Started with PeopleSoft EnterpriseOne Warehouse Management.....	1
Warehouse Management Overview.....	1
Warehouse Management Integrations.....	1
Warehouse Management Implementation.....	2
Global Implementation Steps.....	2
Warehouse Management Implementation Steps.....	3

Chapter 2

Understanding Warehouse Management.....	5
Description of the Warehouse Management System.....	5

System Integration.....	5
Features	7
Detailed Information.....	10

Chapter 3

Setting Up Warehouse Management.....13

Understanding Warehouse Setup.....	13
Setup Considerations.....	13
Locations	14
Fixed and Random Locations.....	16
Item Warehouse Information.....	17
Setting Up Locations.....	18
Understanding Locations.....	18
Prerequisite.....	21
Forms Used to Set Up Locations.....	21
Creating the Warehouse.....	23
Defining Warehouse Specifications.....	24
Entering Locations Interactively.....	26
Defining Zones.....	26
Defining the Level of Detail for Locations.....	26
Setting Processing Options for Location Master (P4100).....	27
Defining Location Dimensions.....	27
Defining Location Characteristics.....	29
Defining Location Profile Information for a Single Location.....	29
Defining Location Profile Information for Multiple Locations.....	31
Defining Location Capacity.....	33
Setting Up Fixed Locations and Zones.....	34
Understanding Fixed Locations and Zones.....	34
Prerequisite.....	35
Forms Used to Set Up Fixed Locations and Zones.....	35
Setting Up Fixed Putaway Locations.....	35
Setting Up Fixed Picking Locations.....	36
Setting Up Fixed Replenishment Zones.....	36
Setting Up Random Requirements.....	36
Understanding Random Requirements.....	37
Forms Used to Set Up Random Requirements.....	39
Defining Location Characteristics by Location or Group.....	39
Assigning Characteristic Groups to Locations.....	39
Setting Up Random Rules.....	40

Creating the Random Locations Table.....	41
Building the Tiebreaker Table.....	41
Setting Up Item Warehouse Information.....	41
Understanding Item Warehouse Information.....	42
Forms Used to Set Up Item Warehouse Information.....	44
Defining Unit of Measure Structures.....	44
Setting Processing Options for Item Master (P4101).....	45
Defining Item Classification Codes.....	49
Setting Up Item Profiles.....	49
Setting Up Item Unit of Measure and Capacity Definitions.....	51
Setting Processing Options for Item Unit of Measure Definition (P46011).....	52
Setting Up Inclusion Rules.....	53
Understanding Inclusion Rules.....	53
Forms Used to Set Up Inclusion Rules.....	53
Defining Inclusion Rules.....	53
Setting Processing Options for Supply/Demand Inclusion Rules (P34004).....	53
Setting Up Order Groups.....	54
Understanding Order Groups.....	54
Forms Used to Set Up Order Groups.....	54
Setting Up Order Groups.....	54
Setting Up Unit of Measure Groups.....	55
Understanding Unit of Measure Groups.....	55
Forms Used to Set Up Unit of Measure Groups.....	55
Setting Up Unit of Measure Groups.....	55
Setting Up Storage Containers.....	56
Understanding Storage Containers.....	57
Forms Used to Set Up Storage Containers.....	58
Defining Storage Containers.....	58
Setting Up Allowed Containers for Each Location.....	62
Setting Up Item Standard Packs.....	62
Setting Processing Options for Item Standard Packs (P460131).....	63
Setting Up Pallet Standard Packs.....	64
Setting Up Container Bill of Materials.....	65
Understanding Container Bill of Materials.....	65
Forms Used to Set Up Container Bill of Materials.....	66
Setting Up Container Bill of Materials.....	66
Setting Up Shipping Cartons.....	67
Understanding Shipping Cartons.....	67
Forms Used to Set Up Shipping Cartons.....	68
Setting Up Shipping Cartons.....	68

Setting Up Locations for Carton Recommendation.....	69
Forms Used to Set Up Locations for Carton Recommendations.....	69
Setting Up Locations for Carton Recommendations.....	69
Setting Up Carton Recommendation Methods for Items.....	69
Prerequisite.....	69
Forms Used to Set Up Carton Recommendation Methods for Items.....	70
Setting Up Carton Recommendation Methods for Items.....	70
Setting Up Carton Fill Percentages for Items.....	70
Understanding Carton Fill Percentages for Items.....	70
Prerequisite.....	71
Forms Used to Set Up Carton Fill Percentages for Items.....	71
Setting Up Carton Fill Percentages for Items.....	71
Working with Standard Pack Carton Recommendations.....	71
Understanding Standard Pack Carton Recommendations.....	72
Understanding Carton Charges for Expendable Containers.....	77
Prerequisites.....	81
Forms Used to Use Standard Pack Carton Recommendations.....	81
Activating Standard Pack Recommendations.....	83
Revising Standard Pack Carton Recommendations.....	84
Revising Carton Quantities.....	85
Calculating Round to Standard Pack.....	86
Setting Processing Options for Standard Pack Carton Recommendations (P4615).....	87
Adding Cartons to a Shipment.....	87
Reorganizing Cartons and Items in a Shipment.....	89
Reviewing Carton Detail Information.....	91
Setting Processing Options for Carton Reorganization (P4620).....	91
Running the Carton Recommendations Report (R46151).....	94
Setting Up Carton Charges for Expendable Containers.....	94
Setting Up UCC 128 Processing.....	95
Understanding UCC Identification Codes.....	96
Prerequisites.....	100
Forms Used to Set Up UCC 128 Processing.....	101
Setting Up Hierarchical Configurations.....	101
Setting Up Ship Notice/Manifest Requirements	102
Setting Up Item Information	103
Working with Label Information.....	103
Understanding Label Information.....	104
Prerequisites.....	107
Forms Used to Work with Label Information.....	108
Setting Up Additional Outbound Label Information.....	108

Setting Up Label Next Numbers.....	109
Entering Unusable Label Information.....	109
Running the Purge Unusable Label Numbers Program (R4622P).....	109
Running the Allocating Sales Orders to Carton by Shipment Program (R46155).....	110
Setting Processing Options for Allocate Sales Orders to Cartons by Shipment (R46155).....	110
Reconciling Inbound Shipment Information.....	111
Setting Up License Plate Processing.....	111
Understanding License Plate Setup.....	111
Forms Used to Set Up License Plate Processing.....	113
Activating License Plate Processing for a UOM and Item Dimension Group/ UOM and Item.....	114
Setting Up License Plate Branch/Plant Constants.....	114
Set Up Segment Definitions for License Plate Numbers.....	115

Chapter 4

Working with License Plate Information.....	117
Understanding License Plates.....	117
Prerequisite.....	120
Managing License Plate Information.....	120
Forms Used to Manage License Plate Information.....	121
Assigning Items to a Licence Plate Record.....	122
Assigning Child License Plates to Parent Records.....	124
Adding License Plate Cross References.....	125
Setting Processing Options for the License Plate Workbench (P46L10).....	125
Managing License Plate Information.....	126
Revising Location, Volume, and Weight Information.....	126
Reviewing License Plate History.....	127
Setting Processing Options for F4602 License Plate Conversion (R46L820).....	127

Chapter 5

Working with RFID Processing.....	129
Understanding the GTIN.....	129
Understanding Electronic Product Codes.....	129
Understanding EPC Numbers for Outbound Shipments.....	130
Understanding EPC Inbound Processing.....	131
Prerequisites.....	132
Setting Up RFID Processing Information.....	132
Forms Used to Process RFID Information.....	133
Setting Up Unique Product Numbers.....	133

Setting Up EPC Header Values and Segments.....	134
Generating EPC Numbers When Creating Carton Detail.....	139

Chapter 6

Working with Movement Processing	141
Understanding Movement Processing.....	141
Defining Process Selection.....	141
Understanding Process Selection.....	141
Prerequisite.....	142
Form Used to Define Process Selection.....	142
Defining Process Selection Rules.....	142
Setting Processing Options for Process Selection (P46093).....	144
Defining Movement Instructions.....	145
Understanding Movement Instructions.....	145
Prerequisite.....	147
Forms Used to Define Movement Instructions.....	148
Setting the Process Mode.....	148
Defining Common Movement Instruction Criteria.....	149
Defining Specific Movement Instruction Criteria.....	150
Setting Processing Options for Movement Instructions (P46095).....	151

Chapter 7

Working with Putaway Requests.....	153
Understanding Putaway Requests.....	153
Creating Putaway Requests.....	153
Understanding Putaway Request Creation.....	153
Prerequisites.....	155
Forms Used to Create Putaway Requests.....	157
Creating Putaway Requests Interactively.....	157
Overriding the Unit of Measure Structure.....	157
Setting Processing Options for PO Receipts (P4312).....	158
Cross Docking with the Workbench.....	168
Locating Existing Putaway Requests.....	169
Understanding Existing Putaway Requests.....	169
Forms Used to Locate Existing Putaway Requests.....	170
Locating Putaway Requests.....	170
Setting Processing Options for Request Inquiry (P4600).....	170
Creating Putaway Requests by Batch.....	171

Running the Batch License Plate Putaway Request (R46L140).....	171
Setting Processing Options for Batch License Plate Putaway Request (R46L140).....	172
Running the Batch Putaway Request.....	172
Setting Processing Options for Batch Putaway Request (R46140).....	172

Chapter 8

Working with Putaway Reservations.....	175
Understanding Putaway Reservations.....	175
Creating Putaway Reservations	176
Prerequisite.....	176
Forms Used to Create Putaway Reservations.....	176
Creating Putaway Reservations for All Order Lines.....	176
Creating Putaway Reservations for Individual Order Lines.....	177
Creating Putaway Reservations by Batch.....	177
Creating Alternate Putaway Reservations.....	177
Setting Processing Options for Online Putaway Reservations (P46130).....	177
Changing Existing Putaway Reservations.....	177
Understanding Putaway Reservation Changes.....	178
Forms Used to Change Existing Putaway Reservations.....	178
Changing Existing Reservations by Splitting Order Lines to Multiple Locations.....	178
Changing Existing Reservations Manually.....	178

Chapter 9

Working with Putaway Suggestions.....	179
Prerequisites.....	179
Creating Putaway Suggestions.....	179
Understanding Putaway Suggestion Creation.....	179
Forms Used to Create Putaway Suggestions.....	181
Creating Putaway Suggestions Interactively.....	181
Creating Putaway Suggestions by Batch.....	181
Creating Alternate Putaway Suggestions.....	181
Setting Processing Options for Location Selection Driver (R46171).....	181
Creating Task and Trip Assignment and Move Documents.....	183
Understanding Task and Trip Assignment and Move Documents.....	183
Creating Tasks and Trips.....	184
Setting Processing Options for Task and Trip Creation (R46471).....	185
Creating the Summary Document.....	186
Creating Move Tags.....	186

Confirming Putaway Suggestions.....	187
Understanding Putaway Suggestion Confirmation.....	187
Forms Used to Confirm Putaway Suggestions.....	188
Confirming Putaway Suggestions Interactively.....	188
Confirming Putaway Suggestions by Batch.....	188
Overriding Putaway Suggestions.....	188
Setting Processing Options for Warehouse Movement Confirmations (P4617).....	189

Chapter 10

Working with Picking.....	193
Understanding Picking.....	193
Working with Pick Requests.....	193
Understanding Pick Requests.....	193
Prerequisite.....	196
Forms Used to Work with Pick Requests.....	196
Creating Pick Requests Interactively.....	196
Setting Processing Options for Sales Order Entry (P4210)	196
Creating Sales Order Pick Requests by Batch.....	223
Creating Bulk Pick Requests.....	223
Locating Existing Pick Requests.....	223
Locating Existing Bulk Pick Requests.....	224
Working with Pick Suggestions.....	224
Understanding Pick Suggestions.....	224
Prerequisites.....	231
Forms Used to Work with Pick Suggestions.....	232
Creating Pick Suggestions Interactively.....	233
Creating Pick Suggestions by Batch.....	233
Creating Alternate Pick Suggestions.....	233
Confirming Pick Suggestions Interactively.....	233
Confirming Pick Suggestions by Batch.....	233
Reviewing Bulk Pick Suggestions.....	233
Overriding Pick Suggestions.....	234
Overriding Shipping Locations.....	234
Creating Tasks and Trips.....	234
Creating the Summary Document.....	234
Creating Move Tags.....	234
Confirming Shipment.....	234
Setting Processing Options for Shipment Confirmation (P4205)	236

Chapter 11

Working with Replenishment.....	249
Understanding Replenishment.....	249
Working with Replenishment Requests.....	249
Understanding Replenishment Requests.....	250
Forms Used to Work with Replenishment Requests.....	252
Creating Replenishment Requests Interactively.....	252
Setting Processing Options for Manual Replenishments (P46100).....	252
Creating Replenishment Requests by Batch.....	253
Creating Replenishment Requests Automatically.....	253
Setting Processing Options for Location Selection Driver (R46171).....	253
Locating Existing Replenishment Requests.....	255
Working with Replenishment Suggestions.....	255
Understanding Replenishment Suggestions.....	256
Prerequisites.....	259
Forms Used to Work with Replenishment Suggestions.....	260
Creating Replenishment Suggestions by Batch.....	260
Creating Replenishment Suggestions Interactively.....	260
Creating Alternate Replenishment Suggestions.....	260
Creating Tasks and Trips	261
Creating the Summary Document	261
Creating Move Tags.....	261
Confirming Replenishment Suggestions Interactively.....	261
Confirming Replenishment Suggestions by Batch.....	261
Overriding Replenishment Suggestions.....	261
Working with Replenishment to Random Locations.....	261
Understanding Replenishment to Random Locations.....	262
Prerequisites.....	264
Forms Used to Work with Replenishment to Random Locations.....	265
Defining Replenishment Groups.....	265
Setting Processing Options for Replenishment Groups (P46014).....	266
Defining Detailed Replenishment Information	266
Setting Processing Options for Replenishment by Random Rules (P46015)	266
Running the Random Location Replenishment Program (R461602)	267

Chapter 12

Working with Advanced Features.....	269
Understanding Advanced Features.....	269
Understanding Dimension and Weight Calculations.....	270

Setting Up Advanced Features.....	271
Understanding Advanced Feature Setup.....	271
Prerequisite.....	272
Forms Used to Set Up Advanced Features.....	273
Setting Up Two-Phase Movements	273
Assigning Tax Codes.....	274
Setting Up Freeze Rules.....	275
Setting Up License Plate Tracking Numbers.....	275
Setting Up Rollup.....	275
Setting Up Repack.....	276
Defining Maximum Quantity by Zone.....	276
Using Advanced Features.....	276
Understanding Advanced Feature Use.....	276
Forms Used to Use Advanced Features.....	279
Working with Item Dimension and Warehouse Process Groups.....	280
Reposting Open Location Suggestions.....	280
Managing Location Detail Information.....	280
Comparing Inventory and Warehouse Item Balance.....	280
Creating Location Detail Information from Existing Inventory Data.....	281
Reviewing Location Utilization and Detail Information.....	281
Purging Closed Requests, Suggestions, Tasks, and Reservations.....	282
Setting Up Manufacturing Information	282
Understanding Manufacturing Information.....	282
Forms Used to Set Up Manufacturing Information.....	284
Creating the Parts Lists Interactively	284
Creating the Parts List by Batch	284
Identifying Ineligible Items.....	285
Setting Processing Options for Work Order Completions (P31114).....	285
Setting Processing Options for Super Backflush (P31123).....	292
Setting Processing Options for Completions Workbench (P3119).....	295
Setting Up Technical Information	298
Understanding Technical Information.....	298
Running the Process Putaway Requests Program	309
Running the Process Pick Requests Program	309
Running the Process Replenishment Requests Program	309

Glossary of PeopleSoft Terms.....311

Index 321

About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications. For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

Address Book Number

Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.

As If Currency Code	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
Batch Number	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
Batch Date	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
Batch Status	Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are: <i>Blank:</i> Batch is unposted and pending approval. <i>A:</i> The batch is approved for posting, has no errors and is in balance, but it has not yet been posted. <i>D:</i> The batch posted successfully. <i>E:</i> The batch is in error. You must correct the batch before it can post. <i>P:</i> The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E. <i>U:</i> The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.
Branch/Plant	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
Business Unit	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
Category Code	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
Company	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.
Currency Code	Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
Document Company	Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document. If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and Fiscal Year

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

PeopleSoft EnterpriseOne Warehouse Management Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Pages with deferred processing.
- Common elements in this PeopleBook.

PeopleSoft Application Fundamentals

The PeopleSoft Warehouse Management PeopleBook provides you with implementation and processing information for the PeopleSoft Warehouse Management system. However, additional, essential information describing the setup and design of the system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks. The following companion PeopleBooks contain information that applies specifically to PeopleSoft Engineer to Order.

- PeopleSoft Inventory Management
- PeopleSoft Product Data Management
- PeopleSoft Shop Floor Management
- PeopleSoft Requirements Planning
- PeopleSoft Job Cost
- PeopleSoft Capital Asset Management
- PeopleSoft Quality Management
- PeopleSoft Sales Order Management
- PeopleSoft Procurement
- PeopleSoft Contract Billing, Service Billing

Pages With Deferred Processing

Several pages in PeopleSoft Warehouse Management operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page—for example, if a field contains a default value, any value you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

About These PeopleBooks

A companion PeopleBook called About These PeopleBooks contains general information, including:

- Related documentation, common page elements, and typographical conventions for PeopleBooks.
- Information about using PeopleBooks and managing the PeopleBooks Library.
- A glossary of useful PeopleSoft terms that are used in PeopleBooks.

CHAPTER 1

Getting Started with PeopleSoft EnterpriseOne Warehouse Management

This chapter discusses:

- Warehouse Management overview
- Warehouse Management integrations
- Warehouse Management implementation

Warehouse Management Overview

Warehouse Management is an integral part of the manufacturing and distribution processes. It works in conjunction with the Inventory Management and Shop Floor Management systems to manage inventory and the products that companies produce and ship. The Warehouse Management system does not create any accounting records of its own. Instead, the system uses records that are created by other systems to help keep accurate financial records of warehouse transactions. The Warehouse Management system minimizes the number of duplicate records and mismatched data, reduces the hardware requirements and increases the system's performance.

Warehouse Management Integrations

Warehouse Management can exchange data with the following other systems:

- Sales Order Management
- Inventory Management
- Configuration Management
- Procurement
- Shop Floor Management
- Transportation Management

Sales Order Management

Warehouse Management exchanges data with the Sales Order Management system in the following ways:

- The system generates a picking request from the following programs:
 - Sales Order Entry (P4210)

- Held Order Release (P43070)
- Sales Order Speed Status Update (P42040)
- The system automatically posts Advanced Warehouse Management commitments when a sales or manufacturing commitment is reposted from:
 - Backorder Release (online or batch) (P42117)
 - Transfer Order Processing (P4242)

Inventory Management

Warehouse Management exchanges data with Inventory Management by maintaining warehouse location details using the following Inventory Management programs:

- Lot Master (P4108)
- Inventory Issues (P4112)
- Cycle Count Update (R41413)
- Procurement processes putaway reservations.

Configuration Management

Warehouse Management exchanges data with Configuration Management by generating picking requests for configured items.

Procurement

Warehouse Management exchanges data with Procurement when you create a receipt, the system can generate picking requests.

Shop Floor Management

Warehouse Management exchanges data with Shop Floor Management through Order Processing (R31410) and the Co/By Product Completion Window (P31115)

Transportation Management

Warehouse Management exchanges data with Transportation Management by generating picking requests at the time of shipment approval.

Warehouse Management Implementation

This section provides an overview of the steps that are required to implement the Warehouse Management system.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About These PeopleBooks* with information about where to find the most current version of each.

Global Implementation Steps

This table lists the suggested implementation steps for the PeopleSoft EnterpriseOne Configurator.

Step	Reference
1. Set up global user defined code tables.	<i>PeopleSoft EnterpriseOne Product Data Management 8.11 PeopleBook</i> , “Setting Up Product Data Management,” Defining Document Type Constants for Work Orders
2. Set up fiscal date patterns, companies, and business units.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook</i> , “Setting Up an Organization”
3. Set up system next numbers.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook</i> , “Setting Up System Next Numbers”
4. Set up accounts.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 PeopleBook</i> , “Setting Up Accounts”
5. Set up general accounting constants.	<i>PeopleSoft EnterpriseOne General Accounting 8.11 PeopleBook</i> , “Setting Up the General Accounting System,” Setting Up Constants for General Accounting
6. Set up multicurrency processing, including currency codes and exchange rates.	<i>PeopleSoft EnterpriseOne Multicurrency Processing 8.11 PeopleBook</i> , “Setting Up General Accounting for Multicurrency Processing”
7. Set up ledger type rules.	<i>PeopleSoft EnterpriseOne General Accounting 8.11 PeopleBook</i> , “Setting Up the General Accounting System,” Setting Up Ledger Types for General Accounting
8. Enter address book records.	<i>PeopleSoft EnterpriseOne Address Book 8.11 PeopleBook</i> , “Entering Address Book Records”
9. Set up default location and printers.	PeopleSoft EnterpriseOne Tools 8.94: Foundation PeopleBook
10. Set up branch/plant constants.	<i>PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook</i> , “Entering Item Inventory Information,” Entering Branch/Plant Information
11. Set up manufacturing and distribution AAIs.	<i>PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook</i> , “Setting Up the Inventory Management System,” Setting Up AAIs in Distribution Systems
12. Set up document types.	<i>PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook</i> , “Setting Up the Inventory Management System,” Setting Up Document Type Information
13. Set up shop floor calendars.	<i>PeopleSoft EnterpriseOne Shop Floor Management 8.11 PeopleBook</i> , “Setting Up Shop Floor Management,” Setting Up a Shop Floor Calendar
14. Set up manufacturing constants.	<i>PeopleSoft EnterpriseOne Product Data Management 8.11 PeopleBook</i> , “Setting Up Product Data Management,” Setting Up Manufacturing Constants

Warehouse Management Implementation Steps

This table lists the implementation steps for the General Accounting system:

Step	Reference
1. Setting up Warehouse Management	<i>PeopleSoft EnterpriseOne Shop Floor Management 8.11 PeopleBook</i> , “Understanding Shop Floor Management,” Types of Manufacturing
2. Setting up Movement Processing	<i>PeopleSoft EnterpriseOne Bulk Stock Inventory 8.11 PeopleBook</i> , “Setting Up Bulk Depots”
3. Setting up Putaway Requests	<u>Chapter 7, “Working with Putaway Requests,” page 153</u>
4. Setting up Putaway Reservations	<u>Chapter 7, “Working with Putaway Requests,” page 153</u>
5. Setting up Putaway Suggestions	<u>Chapter 9, “Working with Putaway Suggestions,” page 179</u>
6. Setting up Picking	<u>Chapter 10, “Working with Picking,” page 193</u>
7. Setting up Replenishment	<u>Chapter 11, “Working with Replenishment,” page 249</u>
8. Setting up Advanced Topics and Inquiries	<u>Chapter 11, “Working with Replenishment,” page 249</u>

CHAPTER 2

Understanding Warehouse Management

This chapter discusses:

- Description of the Warehouse Management system.
- System integration.
- Features.
- Detailed information.

Description of the Warehouse Management System

The Warehouse Management system is an integral part of your manufacturing and distribution processes. It works in conjunction with the Inventory Management and Shop Floor Management systems to manage your inventory and the products that you produce and ship. The Warehouse Management system does not create any accounting records of its own. Instead, the system uses records that are created by other systems to help you keep accurate financial records of your warehouse transactions. The Warehouse Management system minimizes the number of duplicate records and mismatched data, reduces the hardware requirements for your system, and increases your system's performance.

System Integration

The Warehouse Management system can exchange data with the following other systems:

- Sales Order Management
- Inventory Management
- Configuration Management
- Procurement
- Shop Floor Management
- Transportation Management

The Warehouse Management system also can exchange data with the EDI system (order edit and creation for Sales Order Management and Procurement) and the ECS system (general stock movements).

Sales Order Management

The Warehouse Management system exchanges data with the Sales Order Management system in the following ways:

- When you repost a sales or manufacturing commitment, the system automatically posts Advanced Warehouse Management commitments.
- The system generates a picking request from the following programs:
- Sales Order Entry (P4210)
- Backorder Release (online or batch) (P42117)
- Held Order Release (P43070)
- Sales Order Speed Status Update (P42040)
- Transfer Order Processing (P4242)

Inventory Management

The Warehouse Management system exchanges data with the Inventory Management system by maintaining warehouse location details using the following Inventory Management programs:

- Item Master (P4101)
- Item Branch (P41026)
- Lot Master (P4108)
- Item Ledger Inquiry (P4111)
- Inventory Adjustments (P4114)
- Inventory Issues (P4112)
- Inventory Transfers (P4113)
- Item Reclassifications (P4116)
- Cycle Count Update (R41413)
- Tag Inventory Update (R41610)

Configuration Management

The Warehouse Management system exchanges data with the Configuration Management system by generating picking requests for configured items.

Procurement

The Warehouse Management system exchanges data with the Procurement system in the following ways:

- When you create a receipt, the system can generate picking requests.
- Procurement processes putaway reservations.

Shop Floor Management

The Warehouse Management system exchanges data with the Shop Floor Management system in the following ways:

- Warehouse Management generates picking requests from the following Shop Floor Management programs:
- Work Order Parts List (P3111)
- Order Processing (R31410)
- Advanced Warehouse Management generates putaway requests from the following Shop Floor Management programs:

- Work Order Completions (P31114)
- Co/By Product Completion Window (P31115)
- Super Backflush (P31123)

Transportation Management

The Warehouse Management system exchanges data with the Transportation Management system by generating picking requests at the time of shipment approval.

Features

The Warehouse Management system controls many aspects of warehouse operations, from receiving and storing items to retrieving and shipping them. You can design your warehouse to make the most of your available space, employees' time, and the unique storage requirements of the goods that you stock. You can structure your warehouse in almost limitless detail, so you can know the exact location of everything, the exact quantity that you have on hand, and the exact quantity that is available. This detail allows you to maintain a continuous flow of goods and gives you the competitive edge in delivering goods to your customers quickly and efficiently.

Some of the most important features of the Warehouse Management system are:

- User-defined rules for stock movement
- User-defined parameters for items and locations to control stock movement
- Fixed and random locations for more efficient stock movement
- Automatic shipping carton selection during picking
- License plate processing to preform putaway, pick, or replenishment based on full pallet structures, based on a single license plate number.
- Ability to review warehouse contents using the Work With Location Utilization form, which allows you to use up to nine levels of detail
- Manual or automatic storage, picking, and replenishment of stock
- Audit trail reporting of inventory movement

With the Warehouse Management system, you can:

- Create a logical model of your warehouse in as much detail as you need by specifying such characteristics as location dimensions, temperature, humidity, and lighting
- Create a logical model of each item in your warehouse to allow the system to match items to storage locations based on the characteristics of the items and locations
- Control how stock is stored, picked, and replenished by setting up rules for the system to follow
- Move stock to and from specific locations using manual input or automatic system-generated suggestions
- Use random locations for putting items away, picking items, and replenishing items
- Generate an audit trail of reports for each stock movement and review the information online
- Sequence your employees' trips through the warehouse to maximize their productivity

- Confirm stock movement manually with minimal data entry keystrokes or confirm stock movement automatically
- Share stock movement data with other PeopleSoft EnterpriseOne systems to answer inquiries and improve customer service
- Specify detailed carton and container information
- Use carton recommendation to summarize the number and weight of pallets or cartons, and can make carton and pallet recommendations
- Reorganize a carton's contents and its placement within a shipment prior to shipping
- Process inbound and outbound label information for third-party label generation

The Warehouse Management system is extremely flexible because it can use more than 50 different parameters of locations, items, and rules to move your inventory. Additional features of Warehouse Management include the following:

Feature	Description
Profiles of locations and items	For each item and location in your warehouse, you define a profile. For items, you can define parameters and characteristics that control how the system moves the item. For locations, you can define parameters and characteristics that control the location's suitability for storing, picking, or replenishing items.
Rule-based storage, picking, and replenishment	The Warehouse Management system is rule-driven. You can set up movement rules that are based on a variety of factors, including: • The path sequence numbers that you can assign to locations • Each location's purpose, and the quantity and type of items already present in the location • Location tax codes that are matched to item tax code characteristics You can define as many rules as you need for different business purposes.
Automatic replenishment of locations	The system monitors every location in your warehouse and can trigger stock movements to replenish your picking locations automatically when you deplete stock quantities during picking to a point that you define.
Movement path sequencing	You can design traffic patterns in your warehouse to reduce congestion and structure stock movements to use each employee's trip through the warehouse most efficiently.

Feature	Description
License plate processing	License plate processing enables you to perform putaway, pick, or replenishments based on full pallet structures, or to perform movement suggestions for pallet or other container quantities based on a single license plate number. You assign license plate numbers at the branch/plant level by item and unit of measure. For example, a pallet of item ABC may require a license plate, but a case of item ABC may not. License plates supports mixed lots of both single and mixed items. The system checks item compatibility if items are mixed on a single license plate.
Radio Frequency Identification (RFID)	RFID processing enables you to provide item cross reference to a Global Trade Identification Number (GTIN) and define and generate electronic product codes from various applications, such as when creating carton detail from cartons and item quantity on Carton Reorganization (P4620).
Units of measure	You can choose locations in which to store items according to the item's current unit of measure to ensure the best fit and maximization of your available warehouse space. You can also allow the system to combine or break down units of measure to speed up inventory movement or maximize the use of locations.
First In First Out picking	You can move your oldest inventory first by means of oldest receipt date, oldest lot expiration date, or lowest lot number.
Subsystem processing	You can use the subsystem to immediately process putaway, picking, and replenishment requests. To use the subsystem, you must perform the following tasks: • Set the processing options in other systems (such as Procurement and Sales Order Management) to use the subsystem. • Set up the subsystem in Warehouse Management, which involves defining and starting the subsystem.
Interoperability	Interoperability allows you to confirm suggestions using information that is located outside of PeopleSoft EnterpriseOne systems. In Warehouse Management, you can review the suggestions that are located outside of PeopleSoft EnterpriseOne software and make changes, and then you can process the suggestions. If the system cannot process the suggestions, it processes a report that displays the failed suggestion confirmations. You also can automatically send an electronic message to the user's work center.
EDI	When the system creates a sales order through EDI transactions, you can generate picking requests.

Detailed Information

The Warehouse Management system stores information in the following tables. You can update these as needed.

Table	Description
Inventory Constants (F41001)	Contains information for day-to-day transactions, including: • Location number definition • Warehouse control data • Default units of measure • Inclusion rule, which determines the document types and status codes to process through the system
Location Master (F4100)	Contains basic information about each warehouse location, such as zones and level of detail
Location Dimensions (F46022)	Contains the dimensions and maximum weight capacity of location dimension groups
Item Master (F4101)	Contains basic information about each item, including: • Item number • Description • Search keys • Category codes • Default units of measure • Advanced Warehouse Management process groups • Item dimension group
Item Units of Measure Conversion Factors (F41002)	Contains the unit of measure conversion equations that are unique to the warehouse item and its default unit of measure structure information
Location Characteristics (F46021)	Contains a list of characteristics that you use in random movement instructions
Location Capacity (F46024)	Contains the quantity of an item (or an item group) that will fit into each location by item unit of measure
Allowed Containers by Location (F46026)	Contains a list of the containers that you allow in each location
Unit Of Measure Standard Conversion (F41003)	Contains the unit of measure conversion equations that are common to all warehouse items
Item Branch File (F4102)	Contains default item information, including each item's process and dimension groups, and other parameters that are common to every unit of that item in your warehouse

Table	Description
Item Location File (F41021)	Contains each item's quantity information, general ledger class, and lot status in each location
Item Profile (F46010)	Contains a profile of every item in the warehouse
Item Unit Of Measure Definition (F46011)	Defines every unit of measure for each item in the warehouse
Warehouse Requests (F4600)	Contains putaway, pick, and replenishment requests for inventory movement
Warehouse Task Header (F4601)	Contains inventory movement tasks and the corresponding trips that warehouse employees make to fulfill the tasks
Putaway Reservations (F46130)	Contains locations that you reserved for storage of a particular item
Warehouse Suggestions (F4611)	Contains putaway, pick, and replenishment suggestions for inventory movement
Location Detail Information (F4602)	Contains the items, quantities, and units of measure that exist in each location
Item Ledger File (F4111)	Contains a history of all inventory movements
Demand/Supply Inclusion Rules (F34004)	Contains the order types (sales, procurement, and so on) and the order statuses at which the system will create a request
Process Selection Rules (F46093)	Contains information about an item's process groups and order groups, and the movement instructions for putaway, picking, and replenishment that you match to each set of groups
Movement Instructions (F46095)	Contains information, such as zones and tiebreakers, about how the system chooses locations for putaway, picking, or replenishment
Order Groups (F46092)	Contains order types that you assign to a group to use in the Process Selection Rules table
Unit Of Measure Groups (F46096)	Contains units of measure that you assign to a group to use in the Movement Instructions table
Fixed Locations (F46012)	Contains locations that you use only for putaway, only for picking, or only for replenishment by item
Random Locations (F46821)	Contains a list of valid random locations that match the characteristics that you defined in a random rule
Random Tables (F46822)	Contains characteristics that you match to location characteristics to create a table of valid random locations

Table	Description
Container and Carton Codes (F46091)	Contains a list of storage containers and shipping cartons, and their dimensions and weights
Carton Recommendation Rules (F46013)	Contains information about the quantity of each item that will fit in each carton so that the system can recommend cartons for shipping
Maximum Putaway Quantity by Zone (F46025)	Contains the maximum quantity of each item by unit of measure that you allow in each zone
Fixed Replenishment Zones (F46051)	Contains a list of zones from which you allow the system to replenish fixed picking locations
Default Locations/Printers (F40095)	Contains the default warehouse code (branch/plant) and the default printer output queue for transactions that you process through the subsystem
Distribution/Manufacturing Constants (F4009)	Contains information that specifies whether the item unit of measure conversions are unique for each item or applicable to each item in the warehouse
Available Space Tiebreaker (F46027)	Contains information about constants that the system uses during putaway location selection

CHAPTER 3

Setting Up Warehouse Management

This chapter provides an overview of warehouse management setup and discusses how to:

- Set up locations.
- Set up fixed locations and zones.
- Set up random requirements.
- Set up item warehouse information.
- Set up inclusion rules.
- Set up order groups.
- Set up unit of measure groups.
- Set up storage containers.
- Set up container bill of materials.
- Set up shipping cartons.
- Set up locations for carton recommendation.
- Set up carton recommendation methods for items.
- Set up carton fill percentages for items.
- Work with standard pack carton recommendations.
- Set up UCC 128 processing.
- Work with label information.
- Set up license plate information

Understanding Warehouse Setup

This section discusses:

- Setup considerations.
- Locations.
- Fixed and random locations.
- Item warehouse information.

Setup Considerations

To set up your warehouse and items, you must consider:

- The physical layout and characteristics of your warehouse
- The dimensions and capacities of all storage areas, racks, and locations

You also must determine:

- Whether to group items based on similarities, dimensions, or units of measure
- Which factor is most important in managing the warehouse (you can change these at any time to suit your business needs):
- Maximizing storage capacity
- Maximizing productivity by reducing the number of trips that employees make for putaway, picking, or replenishment of stock
- Using other criteria that you define

When you define the warehouse and its contents to the Warehouse Management system, you construct a model of the warehouse and all of the items it contains.

Locations

Three types of locations exist in the Warehouse Management system:

- Logical locations, which the system uses for reporting on particular transactions. A logical location does not physically exist in the warehouse, although it does exist as a record in the Warehouse Management system. An example of a logical location is the variance location, which is the location that the system uses when you are confirming a smaller quantity than the suggested quantity during putaway confirmation. The system stores the remaining (leftover) quantity in the variance location. Then the system can record the variations in quantity during movement confirmation. Another example of a logical location is the primary location.
- Physical locations, which are locations that physically exist in the warehouse or are zones that are considered to be a part of the warehouse. An example of a physical location is an aisle or bin.
- Staging locations, which are locations for temporarily holding items. Staging locations can be logical or physical locations. Examples of staging locations are a variance location (a logical location) and a receiving/shipping dock (a physical location). When you define a staging location in the Location Profile program (P46020), you do not specify any dimension or weight capacity information. The system assumes that staging locations have unlimited capacity.

When you set up locations, you first must assign attributes to each warehouse location within the Location Master table (F4100). Attributes are characteristics that describe the purpose and physical position of each location in the warehouse. To assign attributes to warehouse locations, you use the Location Profile program (P46020). The system uses the attributes during inventory movement to choose locations for putaway, picking, and replenishment.

The Allow Putaway, Allow Picking, and Allow Replenishment options enable you to define which movement (putaway, picking, or replenishment) you want to allow in each location. By defining movements for locations, you can use each location for different purposes.

Before you choose the options for allowing putaway, picking, and replenishment, you should verify that you have defined zones for putaway, picking, and replenishment in the Location Master program (P4100).

Below are examples of locations that you use for different purposes and the options that you should use for allowing putaway, picking, and replenishment:

- Storage location. For a location in a storage area, you typically choose all three options. By choosing the Allow Putaway option, you can store inventory in the location. By choosing Allow Picking, you enable warehouse personnel to pick items in pallets from the location. By choosing the Allow Replenishment

option, you enable warehouse personnel to use the items that they pick from the storage location to replenish another location.

- **Picking location.** For a picking location, you choose the Allow Picking option and do not choose the Allow Putaway and Allow Replenishment options. Although you pick from this location and, therefore, need to replenish inventory to it, you do not want to use the picking location to replenish another location. You also do not want to use the picking location for putaway because you want inventory to continue circulating throughout the warehouse so that sales orders are filled promptly.
- **Dormant location.** For locations that you are temporarily not using, you do not choose the Allow Putaway, Allow Picking, or Allow Replenishment options. For example, you might need to leave a location empty because you are planning to remodel the location.
- **Multipurpose location.** For staging locations, overflow locations, holding locations, receiving locations, and shipping locations, you should choose all three options-Allow Putaway, Allow Picking, and Allow Replenishment. However, for a variance location, you might choose the Allow Putaway and Allow Picking options and not choose the Allow Replenishment option. The variance location temporarily holds remaining quantity when you have confirmed a smaller quantity than the suggested quantity during putaway confirmation.

You also must enter sequence codes for locations. Sequence codes are numbers that the system typically uses for two purposes:

- To identify the order of locations in which warehouse personnel work
- To identify the order in which the system prints move documents

After you enter sequence codes for locations, you can build a tiebreaker table that the system uses to choose between locations when the system has suggested multiple locations for putaway, picking, or replenishment. The system uses the sequence codes that you specified to choose between equally suitable locations.

You also can use sequence codes to specify the order in which move documents, such as move tags, are printed. By printing move tags in the order in which locations appear in the warehouse, you can maximize the efficiency of warehouse operations.

There are several different types of picking that you define by entering sequence codes:

- Right-hand picking
- Alternate picking

Right-hand picking means that locations are sequenced so that warehouse personnel pick inventory from the right side of an aisle. When the employee reaches the end of the aisle, the employee turns around and follows the location sequence, continuing to pick from the right side of the aisle.

Although right-hand picking is usually productive, the disadvantage is that the employee has to travel through the aisle twice (one trip to the end of the aisle and one trip back to the beginning). Right-hand picking is most productive under the following circumstances:

- The aisle ends at a wall.
- A conveyor belt runs in the middle of the aisle.

The aisle contains a large quantity of inventory that must be picked, thus offsetting the time that the employee spends traveling up and down the aisle.

Alternate picking means that locations are sequenced so that warehouse personnel begin picking inventory from the first location on the right side of the aisle, followed by the first location on the left side of the aisle. Then the employee returns to the right side of the aisle, picks from the second location, crosses to the left side of the aisle, and picks from the second location. The employee repeats the progression of picking from the right side followed by the left side until the employee reaches the end of the aisle.

Alternate picking is most productive when your warehouse personnel use machinery such as forklifts to pick pallets in an aisle that does not end with a wall. The machinery might be too large to turn around in the aisle, although diagonal, forward movements enable warehouse personnel to pick inventory efficiently.

Alternate picking in U-shaped format means that warehouse personnel pick from multiple locations on the right side of the aisle first, and then make a u-turn to pick from the locations on the left side. Assuming that the employee is driving a piece of equipment to load the picked items, the employee stops the equipment in the middle of the aisle in a place that is central to all picking locations, completes the picking, and moves forward to repeat the same procedure.

Alternate picking in a U-shaped format is most productive under the following circumstances:

- Warehouse personnel use equipment that is compact enough to turn 360 degrees in an aisle.
- The right-hand side contains a greater quantity of items to be picked so that the u-turn and picking from the left side does not impede efficiency.

Some advantages to alternate picking in U-shaped format are the following:

- Warehouse personnel travel only once through the aisle.
- The number of stops is reduced, provided that the employee stops the equipment in a central location from which multiple locations can be picked.

Finally, you can define latitude, longitude, and height, which are measurements that consist of location coordinates in the warehouse. The system uses these coordinates to calculate the distance between locations. The system uses the coordinates as tiebreakers in the Movement Instructions table (F46095) and in conjunction with the base picking and putaway locations that are defined in the Item Profile Revisions program (P46010).

After you specify information about latitude, longitude, and height, you can build a tiebreaker table that the system uses to choose between locations when the system has suggested multiple locations for putaway, picking, or replenishment. The system uses the latitude, longitude, and height information that you specify to choose between equally suitable locations.

If you have already specified sequence codes and want to build a tiebreaker table, you do not need to specify latitude, longitude, and height information, although doing so will augment the location information that you have already entered.

Fixed and Random Locations

Depending on the type of items that you store in your warehouse, you might use fixed or random locations or both.

In a warehouse where you store items in the same locations for the same movements (putaway, picking, or replenishment), you typically set up fixed locations for each type of movement.

In a warehouse where it is advantageous to store items in varied, multiple locations, you set up random rules. Random rules are sets of criteria that each location must meet to qualify as a location for an item. For example, assume that you have an order consisting of items that require refrigeration. After you create a random rule that requires that a location be refrigerated, you create a random locations table, which is a list of all the random locations that meet the requirements of the random rule. Assuming that you already have created the tiebreaker table, which stores information about each location such as sequence number, available space, and proximity, the system suggests a series of random locations for putaway, picking, or replenishment.

You might use fixed locations in the following circumstances:

- After you have received perishable foods (such as poultry or dairy products) that are not stored in the warehouse, using fixed locations allows you to move the items directly from the receiving dock to the locations from which the items are picked.
- When you routinely receive items that require specific storage conditions, such as temperature, lighting, and humidity, using fixed locations allows you to use the same locations repeatedly for the same purpose.

You might use random locations when you receive pallets. For example, random locations allow you to store the pallets in many different locations in the warehouse. Typically, pallets share the same dimensions and characteristics, which allows flexibility for where the pallets can be put away and picked in the warehouse.

Item Warehouse Information

The Warehouse Management system and the Inventory Management system are closely integrated. By using Inventory Management, you create information about items and branch/plants that provides basic information for the Warehouse Management system.

Item Classification Codes

An item classification code represents a group to which you must assign an item. The system uses these codes to choose the movement instruction tables (for putaway, picking, or replenishment) that determine location selection. The two types of item classification codes are:

- Item dimension group, which the system can use optionally to categorize items with identical or similar dimensions. For example, if you distribute compact discs, you probably have many item numbers for all of the compact discs, and all the compact discs share the same dimensions. By defining an item dimension group called CD, you can assign all of the item numbers to this group. By defining information about size and movement for the group, you do not have to define the information for each item individually.
- Warehouse process group, which the system must use to indicate how certain items are to be handled in the warehouse. For example, if you receive refrigerated products, you might create a warehouse process group called COLD to indicate to warehouse personnel that all items within the group are to be put away, picked, and replenished in a particular zone in the warehouse.

Item Profile Information

You must create an item profile for every item in the Warehouse Management system. The item profile contains basic information, such as:

- Whether you can store items of different types or ages in the same location
- Whether to use one-phase or two-phase movement confirmation for putaway, picking, and replenishment
- The default locations of the item

One-phase movement confirmation allows you to confirm inventory movement in one step after you move the items out of the From location and into the To location.

Two-phase movement confirmation allows you to confirm inventory movement in two steps: first, when you move the items out of a From location into a temporary staging location, and second, when you move the items from the staging location to the To location.

Setting Up Locations

This section provides an overview of locations, lists a prerequisite, and discusses how to:

- Create the warehouse.
- Define warehouse specifications.
- Enter locations interactively.
- Define zones.
- Define the level of detail for locations.
- Set processing options for Location Master (P4100).
- Define location dimensions.
- Define location characteristics.
- Define location profile information for a single location.
- Define location profile information for multiple locations.
- Define location capacity.

Understanding Locations

A location is a place that you use to put away (store), pick (retrieve), or replenish (refill) items that you stock in your warehouse. Your warehouse may consist of many locations, each with its own characteristics, such as:

- Length
- Width
- Height
- Weight capacity
- Proximity to other locations

Setting up locations is a major step in defining your warehouse. By setting up locations, you can match stock items to your locations based on the following criteria:

- Item size and weight
- Maximum quantity by location
- Location characteristics
- Storage in an item's existing location
- Storage in an empty location

When you enter locations, the system stores them in the Location Master table (F4100). You choose the naming convention (a combination of numbers, letters, or both, such as A/3/4 or 6/B/2/A), and you use the format that you specified on Branch/Plant Constants (P41001) (a separator character such as / or . to name locations A/3/4 or 3.C.9). Enter locations interactively if you have only a few locations to create or if you do not want to use the batch process.

Warehouse Specifications

You define warehouse specifications to:

- Define the format in which the system displays a location, such as 1.A.1 or C/3/5
- Specify the inclusion rule that defines the order types and statuses for which you want the Warehouse Management system to create requests
- Define the default units of measure for dimensions, weight, and volume
- Define the default locations for receiving and shipping

Zones

You use zones to group similar locations. After you define a zone, you can use it to make inquiries without having to access each location contained in the zone. The three most common zones in a warehouse are for putaway, picking, and replenishment. For one location, you can have a putaway zone, a picking zone, and a replenishment zone. This situation allows you to use one location for different purposes.

You can also use zones to set up areas for items that require special storage conditions, such as explosion safeguards, refrigeration, low humidity, and low light.

Defining zones is optional. However, by defining zones, you can save processing time and help structure your employees' movement patterns through the warehouse.

Level of Detail for Locations

You use levels of detail to control how the system displays storage areas for picking and replenishment, their capacities, and available space. You define what each level of detail represents (aisles, racks, bins, and so on). For example, if you use the Location Utilization inquiry program (P46220) to view the contents of your warehouse using a level of detail of 1 (warehouse level), the system displays one location (the warehouse). If you use a level of detail of 4 (rack level), for example, the system displays zones, aisles, and racks, and shows you the capacities and available space for each rack.

You can create a blank location, such as //, and assign it to a level of detail of 1. Then you can use level 1 to review the contents of the entire warehouse for reporting purposes or specify a logical warehouse named warehouse.

Location Dimensions

You define the dimensions of each location to maximize the use of warehouse space. After you specify the dimensions of a location, the system can determine which items fit best into the location with a minimum of wasted space. You can define:

- Gross and usable dimensions (width, depth, and height)
- Gross and usable volume, which the system calculates from the dimensions
- Maximum weight that a location can hold

If you do not specify a maximum storage weight, the system assumes that the location has an unlimited capacity for weight.

The system can use the location dimensions that you define to verify that the location has enough space for the item to fit. You can define a capacity method to provide the best match of an item to a location. You can use volume checking (capacity method 1), layering (capacity method 2), or quantity capacity checking (capacity method 3).

- In volume checking, the system compares the volume of the item that you are putting away to the available volume of space in the location. This method is most effective for items that are cubical in shape.
- In layering, in addition to performing volume checking, the system compares the length, width, and height of the item to the length, width, and height of the available space in the location. The system also can rotate the placement of the items during putaway.
- In quantity capacity checking, the system compares the quantity of the item to store to the quantity that you can still fit into the location.

If you use random locations for putaway, you must rebuild the tiebreaker table whenever you define or change the dimensions of a random location.

Location Characteristics

A characteristic is anything that makes a location (or a location group) unique. For example, you might stock items that must be kept cold to prevent spoilage, so you need to identify locations, such as a refrigerator, with characteristics that include Cold. You can assign an unlimited number of characteristics to each location in your warehouse.

Important! If you want the system to choose locations randomly for putaway, picking, or replenishment (instead of using fixed locations), you must define location characteristics. If you use random locations for putaway, picking, or replenishment and you change characteristics for any of those random locations, you must regenerate the Random Locations table (F46821) to ensure that the system uses a current table when it searches for random locations.

If you use random locations for putaway, you must rebuild the tiebreaker table whenever you change the characteristics of a random location.

You can choose a predefined characteristic from the Select User Define Code form. If the predefined characteristics do not meet your needs, you can define the new characteristic and then reference that characteristic on the Work with Location Characteristics form.

Use location characteristic groups to reduce the number of locations for which you need to define characteristics by grouping them all together.

Location Profile Information

You define location profile information to attach specific attributes to each location. These attributes specify the location's purpose, and its physical position in the warehouse. The system can use these attributes during inventory movement to choose locations for putaway, picking, or replenishment, as well as to determine what location is the best fit for the item, based on the attributes. You define attributes such as:

- Location sequences, which can form the routes that warehouse employees follow for putaway, picking, and replenishment
- Relative coordinates for each location in the warehouse, which the system uses to calculate the distance between two locations
- The maximum number of items you can have in the location
- A location dimension group for the location
- A characteristic group for the location (optional)

- Whether you can mix container types, or old and new items in the location
- Whether the location is used for putaway, picking, replenishment, or for staging inventory during two-phase movement

If you use random locations for putaway, you must rebuild the tiebreaker table whenever you change the putaway sequence or proximity (latitude, longitude, or height) of a random location.

Location Capacity

Each location has a finite capacity to hold items (except staging locations). You can define location capacity by location dimension group, such as bin, flow rack, pallet, or bulk (according to the size of the locations). Alternatively, you can define location capacity individually by quantity. You then specify how many items will fit in each location dimension group by an item's unit of measure.

You can define location capacity methods by setting up items to use one of the following capacity checking methods:

- **Volume.** The system compares the item's cubic dimensions with the available cubic dimensions in the location.
- **Layering.** The system performs volume checking and compares the item's length, width, and height to the length, width, and height of the available space in the location. You must also specify whether the item's unit of measure definition allows the system to rotate the item during putaway.
- **Quantity.** The system compares the quantity of the item to store to the quantity that you can still fit into the location.

A location dimension group only defines the volume of each location in the group. If you define an item's unit of measure to use quantity when you verify a location's capacity, you must use Location Capacity Definition (P46024) to define the quantity of the item that will fit into a location. The system allows you to toggle between item and item dimension group format. If you use the quantity capacity checking method, defining quantities by item dimension group is faster because you do not have to define quantities and capacities for every item that you stock.

Prerequisite

Verify that you have identified the characteristics, dimensions, and physical position of each location in the warehouse.

Forms Used to Set Up Locations

Form Name	Form ID	Navigation	Usage
Branch/Plant Constants	W41001H	Warehouse System Setup (G4641), Branch/Plant Constants Click the Add button on the Work With Branch/Plant Constants form.	Create warehouses. Specify whether you want the system to track locations and their contents.
Branch Location Definition	W41001A	Select a record on the Branch/Plant Constants form, and select Location Def from the Row menu.	Define warehouse specifications.

Page Name	Object Name	Navigation	Usage
Enter Location Information	W4100B	Warehouse System Setup (G4641), Location Master Click the Add button on the Work With Location Master form.	Enter locations into the system. Define zones. Define the level of detail for locations.
Location Dimension Revisions	W46022B	Warehouse System Setup (G4641), Location Dimensions Click the Add button on the Work With Location Dimensions form.	Define location dimensions.
Location Characteristics Revisions	W46021B	Warehouse System Setup (G4641), Location Characteristics For a single location, click By Location in the Display section of the Work With Location Characteristics form, and click the Add button. For a location group, click By Characteristics in the Display section of the Work With Location Characteristics form, and then click the Add button.	Define location characteristics.
Location Profile Revisions	W46020B	Warehouse System Setup (G4641), Location Profile Select a record on the Work with Location Profiles form, and select Profile Revisions from the Row menu.	Define location profile information for a single location.
Enter Location Profile Information	W46020C	Select records on the Work with Location Profiles form, and select Enter Location Inf from the Form menu.	Define location profile information for multiple locations.
Location Capacity Revisions	W46024C	Warehouse System Setup (G4641), Capacity Definition by Item Warehouse System Setup (G4641), Capacity Definition by Group On the Work With Location Capacity form, select one of the following options and click Add: Item Number or Item Dimension Group.	Define location capacity.

Creating the Warehouse

Access the Branch/Plant Constants form.

Branch/Plant Constants form

Branch/Plant

An alphanumeric code that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.

You can assign a business unit to a document, entity, or person for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business unit to track equipment by responsible department.

Business unit security might prevent you from viewing information about business units for which you have no authority.

Address Number

A number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

Location Control (Y/N)

A value or option that indicates which type of location control the system requires. You should use location control if you want to use only locations that are in the Location Master table (F4100). Turn this option on to indicate that the system uses only locations that are defined in the Location Master

table. When the Warehouse Control option is turned on, the Location Control option must also be turned on.

For PeopleSoft World, valid values are:

Y: Yes, use only locations in the Location Master table.

N: No, do not restrict locations to those in the Location Master table. Use all locations that conform to the location format defined on Branch/Plant Constants - Page 2.

Warehouse Control (Y/N)

A code that determines whether the system creates warehouse transactions for the branch/plant.

See Also

Setting Up Constants in the Inventory Management Guide for more information on branch/plant constants

Defining Warehouse Specifications

Access the Branch Location Definition form.

Branch/Plant Constants - Branch Location Definition

OKCancelTools

Branch/Plant

10

Western Distribution Center

Location Format Specification

Location Segment Specification

Warehouse Control

Location Separator Character

Length

Left/Right

Length

Left/Right

Length

Left/Right

Aisle

2

☒ L☐ R

Bin

3

☒ L☐ R

Code 3

2

☒ L☐ R

Code 4

☒ L☐ R

Code 5

☒ L☐ R

Code 6

☒ L☐ R

Code 7

☒ L☐ R

Code 8

☒ L☐ R

Code 9

☒ L☐ R

Code 10

☒ L☐ R

Branch Location Definition form

Location Separator Character

A character that divides the elements of the location when you display them on forms or reports. For example, you might use a / as a separator character to divide elements such as aisle, bin, and shelf in a location code.

The location code can contain up to 20 characters, including separators.

Separators are not stored in the tables, but are used to edit a location on a form or report. If you do not want to use separators, leave this field blank.

However, you must enter characters and spaces to equal the correct length of each element in the location code. The system then displays the location as one string of characters.

--- FORM SPECIFIC ---

The system uses the character you enter in this field to separate the combination of tank/owner and aisle/bin as it appears on forms or reports.

Companies commonly use a . as the separator character.

Aisle	A number that identifies the number of characters to represent the tank (or aisle for packaged stock). Values are numbers 1 through 8. Specify whether the system should use left or right justification.
Bin	A number that identifies the number of characters to represent the owner for commingled bulk stock (or bin for packaged stock). Values are numbers 1 through 8. Specify whether the system should use left or right justification.
Code 3	The number of characters to represent Code 3 in the location format specification. Specify whether the system should use left or right justification.
Request Inclusion Version	A user defined code (40/RV) that identifies an inclusion rule that you want the system to use for this branch/plant. The Manufacturing and Warehouse Management systems use inclusion rules as follows: • For Manufacturing: Allows multiple versions of resource rules for running MPS, MRP, or DRP. • For Warehouse Management: Allows multiple versions of inclusion rules for running putaway and picking. The system processes only those order lines that match the inclusion rule for a specified branch/plant. You use the inclusion rule to define the orders for which to create requests based on the next status code that is assigned to the order.
Dimension Unit of Measure	A user defined code (system 00/type UM) that identifies the unit of measure that the system uses to display dimensions for the warehouse. The system provides the ability to establish inches, centimeters, meters, and so forth, as a measuring standard.
Volume Display UOM	A user defined code (00/UM) that identifies the unit of measure that the system uses to display volume for this branch/plant. The system inputs a value in this field from Branch/Plant Constants - Page 2 (P410012). You can override this default value.
Weight Display UOM	A user defined code (00/UM) that identifies the unit of measure that the system uses to indicate weight for this item. You can specify ounces, grams, kilograms, and so on, as weight standards. The system uses this unit of measure for the item or overrides it for an individual item or container.
Receiving Location	The area in the warehouse where you receive inventory. The format of the location is user defined and you enter the location format for each branch/plant.
Shipping Location	The location that the system uses as the default when you pick inventory and move the inventory for shipping. The format of the location is user defined by branch/plant (P410012).

Entering Locations Interactively

Access the Enter Location Information form.

Location

The area in the warehouse where you receive inventory. The format of the location is user defined and you enter the location format for each branch/plant.

--- FORM SPECIFIC ---

A location format comprises elements and, optionally, a separator character.

Elements represent more specific locations in a branch/plant. If the tank contains commingled stock, include the separator character defined on Branch/Plant Constants - Page 2 and identify the owner.

The total length of all elements in this field, including separators, cannot exceed 20 characters. The location for a single tank can contain up to the number of characters identified in the Length of Tank/Aisle field on Branch/Plant Constants - Page 2.

The owner ID can contain up to the number of characters identified in the Length of Owner/Bin field on Branch/Plant Constants - Page 2.

If you leave this field blank and do not use a separator character, the system displays the location as an asterisk. If you use a separator character, the system displays the location with the correct number of spaces for each element, followed by the separator character.

Defining Zones

Access the Enter Location Information form.

Put Zone

A code (system 46/type ZN) that identifies areas in the warehouse where goods are put away or stored.

Pick Zone

A code (system 46/type ZN) that identifies an area from which items are picked for shipment.

Replen Zone

A code (system 46/type ZN) that identifies replenishment zones, which are areas in the warehouse from which items are retrieved to replenish or refill picking locations. You assign zones to locations using Location Master (P4100).

Defining the Level of Detail for Locations

Access the Enter Location Information form.

LOD

A code that summarizes or classifies locations and provides a hierarchy of locations for review purposes. For example, you can assign aisles to level 2, and individual bins within the aisle as level 3.

--- FORM SPECIFIC ---

Use the Detail Level field to specify the beginning level of detail that you want the system to display for the location.

Setting Processing Options for Location Master (P4100)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Display

Use these processing options to specify how the system displays information.

- 1. Enter a '1' to omit item location records with no quantity available and no quantity inbound/outbound when calling Availability by Location.** Use this processing option to specifies the type of processing for an event.

Defining Location Dimensions

Access the Location Dimension Revisions form.

Location Dimensions - Location Dimension Revisions			
OK	Cancel	Form	Tools
Branch/Plant		27	
Loc. Dimension Group	BIN	Bin 12x12x24	
Gross Cubic Dimensions		Usable Cubic Dimensions	
Width	13.00	IN	
Depth	13.00	IN	
Height	26.00	IN	
Cubes	2.54	FC	
Weight			
Maximum Weight	200	LB	

Location Dimension Revisions form

Loc. Dimension Group

A code (system 46/type LD) that identifies a group of locations that share the same dimensions. A location dimension group defines the dimensions for all locations that belong to the group. After you set up a location dimension group, you can assign locations to the group through Location Profile Revisions (P46020).

You must define location dimensions if you plan to use volume-based putaway.

Width

The available storage width of the location(s) defined within the location dimension group. The system uses this width only if you use one of two capacity methods to select a putaway location for an item:

- Volume checking (where the system compares the volume of the item to the usable volume of a putaway location)
- Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location)

The system uses the values that you enter for gross width, gross depth, and gross height as default values for the Usable Cubic Dimensions section of the form unless you enter new values.

Depth

The available storage depth of the location(s) defined within the location dimension group. The system uses this depth only if you use one of two capacity methods to select a putaway location for an item:

- Volume checking (where the system compares the volume of the item to the usable volume of a putaway location)
- Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location)

The system uses the values that you enter for gross width, gross depth, and gross height as default values for the Usable Cubic Dimensions section of the form unless you enter new values.

Height

The available storage height of the location(s) defined within the location dimension group. The system uses this height only if you use one of two capacity methods to select a putaway location for an item:

- Volume checking (where the system compares the volume of the item to the usable volume of a putaway location)
- Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location)

The system uses the values that you enter for gross width, gross depth, and gross height as default values for the Usable Cubic Dimensions section of the form unless you enter new values.

Maximum Weight

A number that indicates the maximum weight that is allowed for this location.

See Also

Defining Warehouse Specifications in the Warehouse Management Guide for more information about processing methods

Defining Location Characteristics

Access the Location Characteristics Revisions form.

Location Characteristic	A code (system 46/type DF) defines a characteristic for a location or location group. You can define unlimited characteristics (such as Cold, Dark, Dry, Heavy, and Secure) for any location or location group.
Characteristic Group	A code (system 46/type LC) that identifies a group of locations that share the same characteristics. A location characteristics group defines the characteristics for all locations that belong to the group. After you set up a location characteristics group, you can assign locations to the group through Location Characteristics (P46021).

See Also

Setting Up Random Requirements in the Warehouse Management Guide for more information about random location characteristics and how to rebuild the tiebreaker table

Defining Location Profile Information for a Single Location

Access the Location Profile Revisions form.

Level of Detail	A code that summarizes or classifies locations and provides a hierarchy of locations for review purposes. For example, you can assign aisles to level 2, and individual bins within the aisle as level 3.
Freeze Rule	A code that indicates what putaway restrictions you want to place on a location during the pick process. Valid codes are: <i>Blank</i>: No freeze. The system does not perform any automatic restrictions. <i>1</i>: Freeze when empty. Do not put away to this location after you pick the location empty. <i>2</i>: Freeze when picked (auto reset). Do not put away to this location after picking. When you pick the location empty, the system automatically resets the putaway flag to allow putaway to this location. <i>3</i>: Freeze when picked (manual reset). Do not put away to this location after picking. When you pick the location empty, you must manually reset the putaway flag to allow putaway to this location.
Maximum Items	A number that specifies the maximum number of different items that can be stored in this location at one time. Enter a number from 1 to 99. If you leave the field blank (or zero), the system does not limit the number of different items in the location.
Tax Code	A code (system 46/type LT) that indicates whether the location contains tax-paid inventory (in-bond vs. duty paid). If an item has an assigned tax code, the system puts the item away only in locations with the same tax code. You assign tax codes to items through Item Profile (P46010).
Minimum Put %	The minimum percentage of the total location capacity that you want the system to use during putaway. You specify a minimum putaway percentage

	when you want an item to fill at least this percentage of an empty putaway location.
Minimum Pick %	The minimum percentage of the total location capacity that you want the system to use during picking. If you use this minimum percentage, the system first determines how many of the items fit in the location. It divides the quantity of the item being picked by the maximum quantity that will fit in the location and compares the result to the minimum pick percentage. The system performs this check only if you defined the pick movement instructions to have the system do so.
Verification Code	A two-character code that uniquely identifies a location. The Movement Confirmations program uses the code that you enter to verify that the system used the correct location during putaway or picking.
Container Code	A code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.
Dimension Group	A code (system 46/type LD) that identifies a group of locations that share the same dimensions. A location dimension group defines the dimensions for all locations that belong to the group. After you set up a location dimension group, you can assign locations to the group through Location Profile Revisions (P46020). You must define location dimensions if you plan to use volume-based putaway.
Characteristics Group	A code (system 46/type LC) that identifies a group of locations that share the same characteristics. A location characteristics group defines the characteristics for all locations that belong to the group. After you set up a location characteristics group, you can assign locations to the group through Location Characteristics (P46021).
Staging Locn	A code that indicates whether the location is a staging location, where you hold items temporarily before moving them somewhere else. Staging locations (such as the receiving and shipping docks) do not require a group definition for dimensions, volume, or weight, because they have unlimited capacity. Valid codes are: <i>Y</i>: Yes, this location is a staging location <i>N</i>: No, this location is not a staging location
Recommend Crtn	A code that indicates whether the system recommends shipping cartons when it picks from this location. Valid codes are: <i>Y</i>: Yes, recommend cartons when picking from this location. The system recommends a carton only if you have set up the Carton Recommendation Method for the item. <i>N</i>: No, do not make carton recommendations when picking from this location.
Mix Containers	A code that indicates whether you want to allow more than one type of storage container for an item to be stored in the location. Valid codes are: <i>Y</i>: Allow more than one type of container in this location <i>N</i>: Do not allow more than one type of container in this location

You use Allowed Containers (P46026) to define which containers are allowed in the location.

You can also set up the item profile to allow mixing of containers.

Mix Dates

A code that indicates whether you want the system to store items with different receipt dates in the same location. Values are:

Y: Yes, store items with different receipt dates in the same location.

N: No, do not store items with different receipt dates in the same location.

You must set up the location profile and the item profile in the Warehouse Management system to allow the mixing of dates.

--- FORM SPECIFIC ---

A code that indicates whether you want the system to store items that have different receipt dates in the same location. Values are:

Y: Yes, store items with different receipt dates in the same location.

N: No, do not store items with different receipt dates in the same location.

You must set up the location profile and the item profile in the Warehouse Management system to allow the mixing of dates.

Allow Putaway

A code that indicates whether the location is valid for putaway selection. Valid codes are:

Y: Yes, use this location for putaway

N: No, do not use this location for putaway

Allow Pick

A code that indicates whether this location is valid for picking. Valid codes are:

Y: Yes, use this location for picking

N: No, do not use this location for picking

Allow Replenish

A code that indicates whether you allow replenishment from a location.

Defining Location Profile Information for Multiple Locations

Access the Enter Location Profile Information form.

Location Profile - Enter Location Profile Information

OK Find Cancel Row Tools

Branch/Plant 30

Skip to Location

Records 1 - 10

	Location	Allow Put	Allow Pick	Allow Replenish	Putaway Sequence	Picking Sequence	Replenish Sequence	Distance Latitude
☐	..	N	N	N				
☐	1..	Y	Y	Y				
☐	1.A.	Y	Y	Y				
☐	1.A.1	Y	Y	Y				
☐	1.A.2	Y	Y	Y				
☐	1.B.	Y	Y	Y				
☐	1.B.1	Y	Y	Y				
☐	1.B.2	Y	Y	Y				
☐	1.C.	Y	Y	Y				
☐	1.C.1	Y	Y	Y				

Enter Location Profile Information form

Putaway Sequence

A number that you assign to a location to determine its place in the putaway sequence. Putaway is the movement of inventory to storage after receipt. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the putaway sequence as a tiebreaker when there is more than one location selected for putaway. For example, you can establish sequencing for the most efficient putaway routing.

Picking Sequence

A number that you assign to a location to determine its place in the picking sequence. Picking is the movement of inventory from storage to satisfy an order. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the picking sequence as a tiebreaker when there is more than one location selected to pick from. For example, you can establish sequencing for the most efficient pick routing.

Replenish Sequence

A number that you assign to a location to determine its place in the replenishment sequence. Replenishment is the movement of inventory from storage locations to picking locations. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the replenishment sequence as a tiebreaker when there is more than one location selected to replenish from. For example, you can establish sequencing for the most efficient replenishment routing.

Distance Latitude

The X or latitude coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.

Distance Longitude

The Y or longitude coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.

Maximum Items

A number that specifies the maximum number of different items that can be stored in this location at one time.

Enter a number from 1 to 99. If you leave the field blank (or zero), the system does not limit the number of different items in the location.

Defining Location Capacity

Access the Location Capacity Revisions form.

Capacity Definition by Group - Location Capacity Revisions				
OK Delete Cancel Tools 				
Branch/Plant		27		
Loc. Dimension Group		CAROLS		
Records 1 - 3				Customize Grid ☐
☐	Item Dim Grp	UOM	Container Code	Maximum Capacity
☐	DISK	CA		8.00
☐	DISK	EA		192.00
☐				

Location Capacity Revisions form

Item Number

A code used to toggle between Item Number and Item Dimension Group in the Item Unit of Measure Definition. You may create Dimension Groups and assign them to items in the Item Branch/Plant Master. Valid codes are:

I: Display Item Number Format

0 or Blank: Display Item Dimension Group Format

Item Dimension Group

A code used to toggle between Item Number and Item Dimension Group in the Item Unit of Measure Definition. You may create Dimension Groups and assign them to items in the Item Branch/Plant Master. Valid codes are:

I: Display Item Number Format

0 or Blank: Display Item Dimension Group Format

UOM

A user defined code (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).

Container Code

A code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.

Maximum Capacity	The maximum of an item or item dimension group that can fit in the specified location dimension group. You can also define a storage container to limit the quantity.
Loc. Dimension Group	A code (system 46/type LD) that identifies a group of locations that share the same dimensions. A location dimension group defines the dimensions for all locations that belong to the group. After you set up a location dimension group, you can assign locations to the group through Location Profile Revisions (P46020). You must define location dimensions if you plan to use volume-based putaway.
Item Dim Grp	A code (system 41/type 01) that identifies a group of items that share the same dimensions. An item dimension group defines the dimensions for all items that belong to the group. After you set up an item dimension group, you can assign items to the group through Classification Codes (41011).

Setting Up Fixed Locations and Zones

This section provides an overview of fixed locations and zones, lists a prerequisite, and discusses how to:

- Set up fixed putaway locations.
- Set up fixed picking locations.
- Set up fixed replenishment zones.

Understanding Fixed Locations and Zones

A fixed location is a place that you use for the same purpose, such as putaway, picking, and replenishment for a given item. A zone is a group of locations that you use for a particular purpose. For example, a flow rack near the shipping dock always holds the same item for picking, and a bulk location near the receiving dock always holds pallets of the same item. You use a fixed zone as one large location from which to replenish fixed picking locations.

Fixed Putaway Locations

You set up fixed putaway locations to use the same locations consistently for storing a given item. This consistency allows you to segregate putaway locations for certain items from other locations, or to keep putaway locations near their picking and replenishment locations. Often, your fixed putaway locations are the same as your fixed picking locations.

Fixed Picking Locations

You set up fixed picking locations to use the same locations consistently for picking a given item. This consistency allows you to segregate picking locations from other locations, or to keep certain items' picking locations near their putaway and replenishment locations. Often, your fixed picking locations are the same as your fixed putaway locations.

You might not want to create replenishment suggestions with a quantity that exceeds the quantity that a location can hold. Before you set up a fixed picking location, verify that the sum of each picking location's normal replenishment quantity and maximum replenishment quantity do not exceed the location's maximum capacity quantity. If they do exceed the location's maximum capacity quantity, the system prints movement documents to replenish a greater quantity than the location can hold because the system does not perform any capacity checking. You might not be able to store all of the items in the picking location.

You must set up fixed picking locations if you intend to use replenishment. Replenishment is the process by which the system refills picking locations in which items are depleted.

Fixed Replenishment Zones

You set up one or more fixed replenishment zones to connect replenishment locations with picking locations. The replenishment locations then refill the same picking locations consistently. This process allows you to segregate replenishment zones from other locations or to keep the replenishment locations for certain items near their picking locations.

If you have not set up a fixed replenishment zone for a picking location, the system searches for a replenishment zone that is attached to a picking zone. If you have not set up a picking zone, the system displays an error.

Prerequisite

Verify that the appropriate movement instruction table can access fixed locations.

Forms Used to Set Up Fixed Locations and Zones

Form Name	Form ID	Navigation	Usage
Fixed Putaway Location Revisions	W46012B	Warehousing Movement Rules (G46311), Fixed Putaway Locations Click the Add button on the Work With Fixed Locations form.	Set up fixed putaway locations.
Fixed Picking Location Revisions	W46012A	Warehousing Movement Rules (G46311), Fixed Picking Locations Click the Add button on the Work With Fixed Locations form.	Set up fixed picking locations.
Fixed Replenishment Zone Revisions	W46051C	Warehousing Movement Rules menu (G46311), Fixed Replenishment Zones Click the Add button on the Work with Fixed Replenishment Zones form.	Set up fixed replenishment zones.

Setting Up Fixed Putaway Locations

Access the Fixed Putaway Location Revisions form.

Location

The area in the warehouse where you receive inventory. The format of the location is user defined and you enter the location format for each branch/plant.

Setting Up Fixed Picking Locations

Access the Fixed Picking Location Revisions form.

Maximum Pick Quantity	The number you enter here indicates the maximum quantity to be picked for an item in a specific unit of measure at a location. The system will not suggest this location if the quantity to be picked exceeds the maximum pick quantity you define in this field.
Max Replenishment Quantity	The number you enter here specifies the maximum quantity to be replenished to a fixed picking location. You must enter a quantity in this field if you will be doing economic replenishment. You specify in the processing options for the Location Selection Driver program (P46171) for automatic, or online, replenishment and in the processing options for the Batch Replenishment program (P461601) that you want to perform economic replenishment
Normal Replenishment Point	A number that indicates the normal level of inventory at a fixed picking location that the system uses during batch replenishments to generate replenishment requests. You can have the system perform replenishment when the quantity in a fixed picking location reaches either the normal replenishment point or the minimum replenishment point. During automatic, or online, replenishment, the system uses the minimum replenishment point. For batch replenishment, you specify in the processing options of the Batch Replenishment program (P461601) which replenishment point you want the system to use
Min Replenishment Point	A number that indicates the minimum quantity of inventory at a fixed picking location that the system uses to generate an online replenishment request. You can have the system perform replenishment when the quantity in a fixed picking location reaches either the normal replenishment point or the minimum replenishment point. During automatic, or online, replenishment, the system uses the minimum replenishment point. For batch replenishment, you specify in the processing options of the Batch Replenishment program (P461601) which replenishment point you want the system to use

Setting Up Fixed Replenishment Zones

Access the Fixed Replenishment Zone Revisions form.

Pick Zone	An option that specifies the type of processing for an event.
Pick Location	An option that specifies the type of processing for an event.
Replenishment Zone	A code (system 46/type ZN) that identifies replenishment zones, which are areas in the warehouse from which items are retrieved to replenish or refill picking locations. You assign zones to locations using Location Master (P4100).

Setting Up Random Requirements

This section provides an overview of random requirements and discusses how to:

- Define location characteristics by location or group.
- Assign characteristic groups to locations.
- Set up random rules.
- Create the Random Locations table.
- Build the tiebreaker table.

Understanding Random Requirements

A random requirement is a set of instructions that determine how the system builds random locations in the warehouse. Random requirements allow you to use warehouse space more efficiently because the system selects locations randomly. By creating this flexibility in storage, you enable the process of location selection to operate in a more efficient manner.

Location Characteristics

You define location characteristics to create random requirements. The system uses the random requirements to create random locations, which are groups of locations that correspond to a random rule. The random rule then can be assigned to the movement instructions.

For example, assume that you have an order that consists of items that require refrigeration and are stored in liquid form. Two of the characteristics that you would define might be cold and wet.

Characteristic Groups

You can assign characteristic groups to locations to create random rule requirements. You may also assign characteristics to a location using the Location Characteristics program (P46021).

For example, assume that you have created a characteristic group for an order that consists of refrigerated items that are stored in liquid form. You must specify locations in the warehouse that are suitable in temperature and space for storing the items.

Random Rules

You use random rules to make location selection more efficient by randomly distributing items throughout the warehouse instead of using fixed locations for putaway, picking, and replenishment. You create a random rule using random requirements that are based on location characteristics.

After you set up a random rule, you can include that random rule in a putaway, picking, or replenishment instruction table.

After you add or change a random rule or a location characteristic, you must build the Random Locations table using the Build Random Location Table program (R46821). If you do not run the Build Random Location Table program, the first putaway request that attempts to use the random rule will cause the system to automatically rebuild the Random Locations table (F46821). The rebuild might result in slower processing of the movement request.

Random Locations Table

The Random Locations table (F46821) contains a list of all the random locations for a rule. You run the Build Random Location Table program (R46821) after you change your random rule requirements or after you change the characteristics of random locations.

When you run the Build Random Location Table program, the system matches location characteristics with random rule characteristics and updates the Random Locations table.

Tiebreaker Table

Whenever you move inventory, the system uses information from the Movement Instructions table (F46095) to suggest locations for picking, putaway, or replenishment. If several locations meet the criteria, the system uses the information stored in a tiebreaker table to select the optimum location. To determine tiebreaker information for putaway to random locations, you must create a tiebreaker table that stores the following information about every location in the warehouse:

- Sequence number
- Available space
- Proximity to a base location

You build a tiebreaker table using a program that selects locations and calculates their proximity and available space. You can use the generic program to build a tiebreaker table for all locations in your warehouse, or you can modify the program to create a table with fewer locations.

You must rebuild the tiebreaker table whenever you change any of the following:

- Putaway, Picking, or Replenishment Sequence Codes
- Location characteristics
- Location dimensions
- Location proximity (latitude, longitude, or height)

Forms Used to Set Up Random Requirements

Form Name	Form ID	Navigation	Usage
Location Characteristics Revisions	W46021B	Warehouse System Setup (G4641), Location Characteristics Click the Add button on the Work With Location Characteristics form.	Define location characteristics by location or group.
Location Profile Revisions	W46020B	Warehouse System Setup (G4641), Location Profile On the Work with Location Profiles form, select a location, and from the Row menu, select Profile Revisions.	Assign characteristic groups to locations.
Random Requirements Revisions	W46822B	Warehousing Movement Rules (G46311), Putaway Random Requirements Warehousing Movement Rules (G46311), Picking Random Requirements Warehousing Movement Rules (G46311), Replenishment Random Requirements. Click the Add button on the Work With Random Requirements form.	Set up random rules.

Defining Location Characteristics by Location or Group

Access the Location Characteristics Revisions form.

Assigning Characteristic Groups to Locations

Access the Profile Revisions form.

Location Profile - Location Profile Revisions

Work with Location Profiles | **Location Profile Revisions**

OK Cancel Form Previous Next Tools

Branch/Plant 30

Location ..

Profile | Locations

Level of Detail	1	Container Code		☒ Staging Locn
Freeze Rule		Dimension Group		☐ Recommend Crtn
Maximum Items		Characteristics Group		☒ Mix Containers
Tax Code				☐ Mix Dates
Minimum Put %				☐ Allow Putaway
Minimum Pick %				☐ Allow Pick
Verification Code				☐ Allow Replenish

Location Profile Revisions form

Setting Up Random Rules

Access the Random Requirements Revisions form.

Putaway Random Requirements - Random Requirements Revisions

OK Find Delete Cancel Tools

Branch/Plant 27

Random Rule COLDCA Cold Storage - Cases

Records 1 - 4 [Customize Grid](#)

	Sequence	Rel.	R O	Characteristic	Description
☒	1.0	NE	O	DARK	Low Light
☐	2.0	EQ	R	COLD	Cold
☐	3.0	EQ	R	LOW	Low Random Characteristic
☐					

Random Requirements Revisions form

Random Rule	A code (system 46/type SR) that identifies a random requirements table. If you use Random, Empty or Existing locations for the movement method, you can enter a random rule code to consider only locations whose characteristics match the random rule. You can leave Random Rule blank to have the system consider all locations for each movement method.
Sequence	A number that ranks optional characteristics in a random rule. During random putaway, picking, and replenishment, the system selects locations with characteristics that match the random rule's characteristics, according to the random characteristic sequence. If a characteristic is required, the system does not use the random sequence.
Rel.	A code that indicates what location characteristics should be included or excluded when choosing locations with a random rule. Each characteristic specified on a random rule must have a relationship code. You assign relationships on Random Tables (P46822). Values are: <i>EQ</i>: Search for locations with characteristics that equal the random rule characteristics <i>NE</i>: Search for locations with characteristics that do not equal the random rule characteristics
R O	A code that indicates whether a location characteristic is required or optional for a random rule to select the location. The random rule selects locations that have characteristics matching the random rule's required characteristics. The random rule does not necessarily select locations matching the random rule's optional characteristics. Valid codes are: <i>R</i>: Use only locations that have this required characteristic <i>O</i>: Use locations that have this optional characteristic, if possible
Characteristic	A code (system 46/type DF) defines a characteristic for a location or location group. You can define unlimited characteristics (such as Cold, Dark, Dry, Heavy, and Secure) for any location or location group.

Creating the Random Locations Table

To create the Random Locations table (F46821), select Advanced & Technical Ops (G4631), Build Random Location Table.

Building the Tiebreaker Table

To build the tiebreaker table, select Advanced & Technical Ops (G4631), Build Tiebreaker Information.

Setting Up Item Warehouse Information

This section provides an overview of item warehouse information, and discusses how to:

- Define unit of measure structures.
- Set processing options for Item Master (P4101).
- Define item classification codes.

- Set up item profiles.
- Set up item unit of measure and capacity definitions.
- Set processing options for Item Unit of Measure Definition (P46011).

Understanding Item Warehouse Information

You must provide warehouse information about each item before the system can process items. For example, you can classify items by their size or the demand for them. You must set up units of measure, such as eaches and boxes, and define a unit of measure structure that describes the relationship of each unit of measure to the other units of measure. You also need to specify default locations for items and whether items can mix with different items in the same locations.

Unit of Measure Structures

You must define a unit of measure structure to process an item in the Warehouse Management system. A unit of measure structure describes the relationship between the smallest unit of measure and larger units of measure, such as eaches to boxes, boxes to cases, and cases to pallets. For example, if you lack bulk floor space and you receive a pallet of 500 items, the unit of measure structure allows you to convert pallets to eaches automatically and to store the items in smaller locations. The system uses the unit of measure structure to choose the most efficient unit of measure for picking, putaway, and replenishment.

You can define an unlimited number of unit of measure conversions for an item. For example, you can define conversions such as 24 items per case, 16 cases per pallet, and so on. However, the system limits the structure to 5 unit of measure levels. You assign a code (1 through 5) to each unit of measure level in the structure.

Each item must have a primary unit of measure. The primary unit of measure is the smallest unit of measure that the system can track. You should assign a structure code of 1 to the largest unit of measure, such as a pallet. The system automatically assigns the highest numerical structure code for an item (up to five unit of measure levels) to the primary (smallest) unit of measure.

The system uses the unit of measure conversions based on how you set the unit of measure conversion in System Constants. You can use conversions that were defined for the item in a specific branch/plant, or you can define conversions for an item that apply to all branch/plants. If you do not set the unit of measure conversion, the system searches for the item's conversion in the Item Master table.

The system overrides the Unit of Measure structures for each item that is tracked in the system by a serial number. For these items, the primary unit of measure will always be in level one, with a quantity of one. The system tracks serial numbers using one record for each serial number. You cannot merge these records.

Item Classification Codes

An item classification code is a group to which you assign an item. During inventory movement (putaway, picking, and replenishment), the system uses these codes to choose the movement tables that determine location selection. You use two types of item classification codes for the warehouse:

- Item dimension group
- Warehouse process groups

For example, you can assign a compact disc to the item dimension group DISK and to the warehouse process group FAST because it is a popular item and does not remain in stock very long.

Item Profiles

Every item that you process through your warehouse must have an item profile. The item profile contains basic information such as:

- Whether you can store items of different types or ages in the same location
- Whether to use one or two-phase movement for putaway, picking, and replenishment
- The item's various default locations

For example, you can set up a profile for item Compact Disc to:

- Allow mixing with other items
- Use two-phase putaway, picking, and replenishment
- Use location V// as its default variance location

Item Unit of Measure and Capacity Definitions

You define information about each item's units of measure, such as eaches, boxes, and cases, to allow the system to perform putaway, picking, and replenishment of that item. You define the item's units of measure when you create the Item Master record for the item.

Each item's unit of measure definition includes information such as:

- The default storage container
- A switch that controls license plate tracking for that unit of measure
- The dimensions that the system uses to calculate volume

A unit of measure structure describes the relationship of eaches to boxes, boxes to cases, cases to pallets, and so on. If you use a unit of measure structure, you define each unit of measure in the structure during the creation of the basic Item Master record for the item. If you do not use a unit of measure structure, you must define the primary unit of measure for the item.

You use the Work With Item Unit of Measure Definition form to define the unit of measure's dimensions and how the system processes each unit of measure for an item's structure. You can define units of measure by item or item dimension group, and the system allows you to specify whether to display item or item dimension group information.

You choose an item dimension group from User Defined Codes. If the predefined item dimension groups do not meet your needs, you can define a new item dimension group on User Defined Codes and then reference that group on Unit of Measure Group Revisions.

If you set up an item unit of measure definition, it always overrides an item group unit of measure definition. The item unit of measure is specific to that item, whereas you use the item group unit of measure to supply the unit of measure information for all items in the group during inventory movement. You can set up an item dimension group and then set up item unit of measure definitions for items that vary from the normal dimensions of the group.

For each item unit of measure definition, you can choose whether the system automatically generates UCC (uniform commercial code) 128 information. UCC 128 information is a combination of an ASN (advance shipping notice) and shipping container labels that contain a bar code, which corresponds to a serial number when the bar code is scanned. An ASN is an EDI (electronic data interchange) document that the supplier sends to the customer when the items are shipped. The ASN communicates the contents of the shipment and how the contents were shipped. The supplier also provides the shipping container labels before shipment. When the customer receives the ASN and shipping container labels, the customer can scan the shipping labels and automatically match the items that are received with other EDI documents, thereby automating many aspects of the receipts process.

Forms Used to Set Up Item Warehouse Information

Form Name	Form ID	Navigation	Usage
Item Unit of Measure Conversions	W41002D	Warehouse System Setup (G4641), U/M Definition by Item Select a record on the Work With U/M Definition by Item form, and select UOM from the Row menu. Click the Add button on the Work With Item Unit of Measure Conversions form.	Define unit of measure structures.
Category Codes	W41026G	Warehouse System Setup (G4641), Item Branch Select a record on the Work With Item Branch form, and select Category Codes from the Row menu.	Define item classification codes.
Item Profile Revisions	W46010A	Warehouse System Setup (G4641), Item Profile Revisions Click the Add button on Work With Item Profiles.	Set up item profiles.
U/M Definition by Group Revisions	W46011B	Warehouse System Setup (G4641), U/M Definition by Group Warehouse System Setup (G4641), U/M Definition by Item Click the Add button on the Work With Item Unit of Measure Definition or Work With U/M Definition by Item form.	Set up item unit of measure and capacity definitions.

Defining Unit of Measure Structures

Access the Item Unit of Measure Conversions form.

Item Number	An identifier for an item.
From UoM	A user defined code (system 00/type UM) that identifies the unit of measure for an item. For example, it can be eaches, cases, boxes, and so on.
Quantity	The factor that the system uses to convert one unit of measure to another unit of measure.
To UoM	A code (UDC table 00/UM) that indicates a secondary unit of measure.
Structure Code	A code that determines the hierarchy of items in containers or pallets.

For example:

Unit of Measure

- 1 Pallet = 24 Cases: *structure code 1*
- 1 Case = 12 Interpacks: *structure code 2*
- 1 Interpack = 3 Boxes: *structure code 3*
- 1 Box = 6 Eaches: *structure code 4*

Assign structure code 1 to the largest unit of measure, with smaller units assigned to codes 2, 3, and 4.

Given the above structure example, when one item is stored in the warehouse the location detail (F4602) would have a structure of:

1 Pallet/ with 24 Cases on the Pallet/ with 12 Interpacks in each Case/with 3 Boxes in each Interpack/ with 6 Eaches in each Box

Note. It is not necessary to define your primary unit of measure within a structure. It always defaults in as the lowest level. Or, if you are changing the structure in a program, the system verifies that the primary is present in the structure and is the lowest level.

Setting Processing Options for Item Master (P4101)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options define the default information that the system uses, such as unit of measure.

1. Primary Unit of Measure	Use this processing option to identify the primary unit of measure that the system uses. If you leave this processing option blank, the system uses EA (each).
2. Weight Unit of Measure	Use this processing option to identify the unit of measure for weight that the system uses. If you leave this processing option blank, the system uses LB (pounds).
3. Volume Unit of Measure	A user defined code (00/UM) that indicates the unit of measure by metric conversion for ambient volume. For example, the unit of measure code for a gallon might be GL, or for a liter it might be LT.
4. Template	A template name that you can use when entering items on Item Master Revisions (P4101). This name is case sensitive. If you use any capital letters

in the template name when you add it, you must enter those letters in capitals whenever you search for or attach the template to Item Master Revisions.

Process

These processing options allow you to specify the effective from and thru dates that the system uses in the Item Notes table and whether the system displays certain forms when you add or change information on the Item Master Revisions form.

- 1. Notes From Date**

Use this processing option to specify the effective from date that the system uses in the Print Messages table (F4016). If you leave this processing option blank, the system uses the system date.
- 2. Notes Thru Date**

Use this processing option to specify the effective through date that the system uses in the Print Messages table (F4016). If you leave this processing option blank, the system uses the last day of the default century.
- 3. Category Codes**

Use this processing option to specify whether the system displays the Category Codes form when you add or change information on the Item Master Revisions form. Values are:

Blank: Do not display the form.

1: Display the form.
- 4. Additional System Information**

Use this processing option to indicate whether the system displays the Additional System Information form when you add or change information on the Item Master Revisions form. Values are:

Blank: Do not display the form.

1: Display the form.
- 5. Storage/Shipping**

Use this processing option to specify whether the system displays the Storage/Shipping form when you add or change information on the Item Master Revisions form. Values are:

Blank: Do not display the form.

1: Display the form.
- 6. Cost Revisions (Conditional)**

Use this processing option to specify whether the system displays the Cost Revisions form when you add or change information on the Item Master Revisions form. Values are:

Blank: Do not display the form.

1: Display the form.

Note that in order for the system to display the Cost Revisions form, you must also set the value for the Inventory Cost Level field to 1 on the Item Master Revisions form.
- 7. Price Revisions (Conditional)**

Use this processing option to specify whether the system displays the Price Revisions form when you add or change information on the Item Master Revisions form. Values are:

Blank: Do not display the form.

1: Display the form.

Note that in order for the system to display the Price Revisions form, you must also set the value for the Sales Price Level field to one on the Item Master Revisions form.

8. Unit Of Measure Conversions (Conditional)

Use this processing option to specify whether the system displays the Unit of Measure form when you add or change information, and when the system performs the unit of measure conversions at the item level. Values are:

Blank: The system does not display the Unit of Measure form.

1: The system displays the Unit of Measure form.

9. Item Branch

Use this processing option to specify whether the system displays the Item Branch form when you add or change information on the Item Master Revisions form. Values are:

Blank: Do not display the Item Branch form.

1: Display the Item Branch form, but return to the Item Master form.

2: Display and remain on the Item Branch form.

10. Attachments

Use this processing option to specify whether the system displays the Item Notes form when you select a media object on the Work With Item Master Browse form. Values are:

Blank: Display only the internal attachments.

1: Display the Item Notes form.

11. Use Templates

Use this processing option to specify whether you want to use templates for segmented items. Values are:

Blank: Do not use templates.

1: Use templates.

Workflow

This processing option allows you to specify whether to activate workflow and whether users are allowed to add or change information.

1. Workflow (OBSOLETE)

Please refer to Electronic Signatures in the Auditing Administration Guide, including 21 CFR Part 11 Administration, for more information.

2. Allow Changes (Restart Workflow) (OBSOLETE)

Please refer to Electronic Signatures in the Auditing Administration Guide, including 21 CFR Part 11 Administration, for more information.

3. Log as History Record (OBSOLETE)

Please refer to Electronic Signatures in the Auditing Administration Guide, including 21 CFR Part 11 Administration, for more information.

Global Update

This processing option allows you to update changes made to the second or third item numbers to records in selected tables.

1. Transfer Changes

Use this processing option to specify which tables that the system updates when you have made changes to item numbers in the item branch records. You use the UDC 40/IC to compile the list of tables. Values are:

Blank: The system does not update any tables.

1: The system updates only those tables that contain item branch information with changes to the second and third item numbers.

2: The system updates only selected tables that contain item branch information with changes to the second and third item numbers.

Versions

These processing options allow you to specify the versions for various programs that you access from the Item Master program. Versions control how the system processes and displays information. Therefore, you might need to set the processing options to meet your specific needs.

1. Item Availability (P41202)	Use this processing option to specify the version that the system uses for the Item Availability program (P41202). If you leave this processing option blank, the system uses version ZJDE0001.
2. Item Branch (P41026)	Use this processing option to specify the version that the system uses for the Item Branch program (P41026). If you leave this option blank, the system uses version ZJDE0001.
3. Cost Revisions (P4105)	Use this processing option to specify which version that the system uses when you access the Cost Revisions program (P4105). If you leave this processing option blank, the system uses version ZJDE0001.
4. Segmented Item Availability (P41206)	Use this processing option to specify which version that the system uses when you access the Segmented Item Availability program (P41206). If you leave this processing option blank, the system uses version ZJDE0001.

Interop

These processing options allow you to specify whether the system performs outbound interoperability processing and whether the system creates a record of a transaction prior to changes to the transaction.

1. Transaction Type	Use this processing option to define the type of document for which you want the system to search. The transaction type is a user defined code (00/TT) that identifies the type of transaction, such as an invoice or a sales order. You can either enter the transaction type or choose it from the Select User Define Code form. The system uses the transaction type as the default. Note that if you leave this processing option blank, the system does not perform export processing.
2. Before/After Image Processing	Use this processing option to define the type of document for which you want the system to search. The transaction type is a user defined code (00/TT) that identifies the type of transaction, such as an invoice or a sales order. You can either enter the transaction type or choose it from the Select User Define Code form. The system uses the transaction type as the default. Note that if you leave this processing option blank, the system does not perform export processing. <i>Blank:</i> Write only the after image. <i>1:</i> Write the before and after image.

Defining Item Classification Codes

Access the Category Codes form.

Item Dimension Group	A code (system 41/type 01) that identifies a group of items that share the same dimensions. An item dimension group defines the dimensions for all items that belong to the group. After you set up an item dimension group, you can assign items to the group through Classification Codes (41011).
Warehouse Process Grp 1	A user defined code (41/02) that identifies a group of items that you want to move the same way. A process group determines what movement instructions the system uses for putaway, picking, and replenishment. You use the Classification Codes program (P41011) to assign items to process groups.
Warehouse Process Grp 2	A user defined code (41/02) that identifies a group of items that you want to move the same way. A process group determines what movement instructions the system uses for putaway, picking, and replenishment. You use the Classification Codes program (P41011) to assign items to process groups.
Warehouse Process Grp 3	A user defined code (41/02) that identifies a group of items that you want to move the same way. A process group determines what movement instructions the system uses for putaway, picking, and replenishment. You use the Classification Codes program (P41011) to assign items to process groups.

See Also

Defining Process Selection in the Warehouse Management Guide for information about how warehouse process groups control which movement instructions that the system uses

Setting Up Item Profiles

Access the Item Profile Revisions form.

Overflow Location	A code that identifies the location that the system uses when an item cannot fit into the suggested putaway locations. You can monitor movement suggestions for the overflow location by accessing the audit report (P46175) or by inquiring on the location detail (F4602).
Variance Location	A code that identifies the location that the system uses when you confirm a smaller quantity than the suggested quantity during putaway confirmation. You do this through Change/Split Suggestion during putaway confirmation, where you enter a quantity that is smaller than the suggested quantity, and confirm with a variance to the suggested quantity. The system places the variance (remaining) quantity in the variance location.
Holding Location	A code that identifies the location that the system uses when you confirm a larger quantity than the suggested pick quantity during pick confirmation. You do this through Change/Split Suggestion during pick confirmation, where you enter a quantity that is greater than the suggested quantity, and confirm with a variance to the suggested quantity. The system places the variance (extra) quantity in the holding location.
Base Putaway Location	A code that identifies the base putaway location that the system uses to calculate proximity when you specify proximity as the tiebreaker in a putaway instruction. If you use a tiebreaker that sequences locations according to proximity, the system ranks the locations based on their distance from this base

putaway location. The system calculates distance based on the coordinates (longitude, latitude, and height) you defined in the location profile (P46020).

Base Picking Location

A code that identifies the base picking location that the system uses to calculate proximity when you specify proximity as the tiebreaker in a picking instruction. If you use a tiebreaker that sequences locations according to proximity, the system ranks the locations based on their distance from this base picking location. The system calculates distance based on the coordinates (longitude, latitude, and height) you defined in the location profile (P46020).

1 or 2 Phase Putaway

A code that indicates whether you use 1- or 2-phase confirmation during putaway.

- 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.
- 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location.

If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.

- Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.
- Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location.

Valid codes are:

I: Use 1-phase confirmation

L: Use logical 2-phase confirmation

P: Use physical 2-phase confirmation

1 or 2 Phase Picking

A code that indicates whether you use 1- or 2-phase confirmation during picking.

- 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.
- 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location.

If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.

- Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.
- Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location.

Valid codes are:

I: Use 1-phase confirmation

L: Use logical 2-phase confirmation

P: Use physical 2-phase confirmation

- 1 or 2 Phase Replenishment** A code that indicates whether you use 1- or 2-phase confirmation during replenishment.
- 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.
 - 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location.
- If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.
- Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.
 - Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location.

Valid codes are:

I : Use 1-phase confirmation

L: Use logical 2-phase confirmation

P: Use physical 2-phase confirmation

- Mix Items (Y/N)** A code that indicates whether you want the system to store different items in the same location.

Valid codes are:

Y : Yes, allow different items to be stored in the same location

N: No, do not allow different items to be stored in the same location

- Mix Dates/Lots (Y/N)** A code that indicates whether you want the system to store items with different receipt dates in the same location. Values are:

Y: Yes, store items with different receipt dates in the same location.

N: No, do not store items with different receipt dates in the same location.

You must set up the location profile and the item profile in the Warehouse Management system to allow the mixing of dates.

- Split Lines (Y/N)** A code that indicates whether the system can split a purchase order line when you create a putaway suggestion for the order line. Valid codes are:

Y: Yes, split purchase order lines when making putaway suggestions

N: No, do not split purchase order lines when making putaway suggestions

Setting Up Item Unit of Measure and Capacity Definitions

Access the U/M Definition by Item Revisions form.

U/M Definition by Item - U/M Definition by Item Revisions

OK Cancel Tools

Branch/Plant 27

Item Number 210

Unit Of Measure BX Box

Process Rules Capacity Requirements

Default Pack Code		.
Container Code		.
Capacity Method	1	Volume Checking
U/M Usage	2	Used Like a Box
Carton Rcmd Method		
Putaway Tag Method	T	Print One Move Tag per Trip
Picking Tag Method	T	Print One Move Tag per Trip
Replen. Tag Method	T	Print One Tag per Trip

☐ License Plate
☒ Breakdown
☒ Rollup
☐ Repack
☐ Allow Rotation

U/M Definition by Item Revisions form

Gross Dimensions

The gross width of the location(s) as defined within the location dimension group, the gross width of an item as defined on the Unit Of Measure Definition form (by item or group), or the gross width of a storage container or shipping container. The unit of measure can be defined on the Branch/Plant Constants - Location Definition form.

Gross Weight

The gross weight of one unit of the item in this unit of measure, or the weight of an empty storage container or shipping carton. These values default to the location detail (F4602) and the system uses the values in maximum weight calculations for specified locations during putaway.

Setting Processing Options for Item Unit of Measure Definition (P46011)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Display

Use these processing options to specify how the system displays information.

- 1. Select Item Dimension Group** Use this processing option to specify the item dimension group.
- 2. Item UOM Definition Tab to Display** Use this processing option to specify the item UOM definition tab to display.

Setting Up Inclusion Rules

This section provides an overview of inclusion rules, and discusses how to:

- Define inclusion rules.
- Set processing options for Supply/Demand Inclusion Rules (P34004).

Understanding Inclusion Rules

An inclusion rule specifies which order type, line type, and status combinations that you process through your warehouse. The inclusion rules therefore determine the steps at which the system creates putaway requests (during purchase order receipts entry) or picking requests (during sales order processing).

You must define the inclusion rule and include the order type, next status, and line type for the order for which you want to create a putaway or picking request.

Forms Used to Set Up Inclusion Rules

Form Name	Form ID	Navigation	Usage
Work With Supply/Demand Inclusion Rules	W34004A	Warehouse System Setup (G4641), Request Inclusion Rules	Define inclusion rules.

Defining Inclusion Rules

Access the Work With Supply/Demand Inclusion Rules form.

Setting Processing Options for Supply/Demand Inclusion Rules (P34004)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

WO Types

1. Enter the WO document types for the Inclusion rules.

These can be stacked up one after another for multiple document types. If left blank, WO will be used.
- Work Order Document Types

A code of 1 indicates the system uses the first line of the Data Dictionary column title for the text description of this data item. A code of 2 indicates the system uses the second line of the Data Dictionary column title for the text description. If this field is blank, the system uses the Data Dictionary row description.

Setting Up Order Groups

This section provides an overview of order groups, and discusses how to set up order groups.

Understanding Order Groups

An order group is a set of document types, such as purchase orders or sales orders, that you use as a group to select movement instructions for putaway, picking, and replenishment. You define the order group to identify which putaway, picking, or replenishment instruction table to choose during process selection.

You can use a blank name for your most commonly used order group.

You must assign each order type that you use to an order group. For replenishment, you must assign document type IQ to each order group that you use. Additionally, you must set up order groups if you want to perform online replenishment.

Forms Used to Set Up Order Groups

Form Name	Form ID	Navigation	Usage
Order Group Revisions	W46092A	Warehouse System Setup (G4641), Order Groups Click the Add button on the Work with Order Groups form.	Set up order groups.

Setting Up Order Groups

Access the Order Group Revisions form.

- Order Group

A code (system 46/type DT) that identifies a group of order types that you want to process as one for putaway, picking, and replenishment transactions.

You set up order group codes on User Defined Codes, then add order types to the code on Order Groups (P46092). You specify an order group on Picking

Instructions (P46095) to limit the order types that trigger replenishment after picking.

Order Type

A code (00/DT) that identifies the type of document, such as an order or an invoice.

Setting Up Unit of Measure Groups

This section provides an overview of unit of measure groups, and discusses how to set up unit of measure groups.

Understanding Unit of Measure Groups

A unit of measure group is a set of units of measure that you want the system to process in the same way during putaway, picking, and replenishment. This method saves you time during warehouse setup. You can use unit of measure groups by assigning the groups to movement instruction tables to control inventory movement.

You can assign a unit of measure to only one unit of measure group.

Forms Used to Set Up Unit of Measure Groups

Form Name	Form ID	Navigation	Usage
Unit of Measure Group Revisions	W46096A	Warehouse System Setup (G4641), Unit of Measure Groups Click the Add button on the Work with Order Groups form.	Set up unit of measure groups.

Setting Up Unit of Measure Groups

Access the Unit of Measure Group Revisions form.

Unit of Measure Groups - Unit of Measure Group Revisions

Work with Unit of Measure Groups **Unit of Measure Group Revisions**

OK Cancel Previous Next Tools

Branch / Plant 27

Unit of Measure Group WVA Water Group

Records 1 - 5 [Customize Grid](#) ☐

	U/M	Description
☒	12	Twelve Pack
☐	BT	Bottles
☐	PL	Pallet
☐	SX	Six Pack
☐		.

Unit of Measure Group Revisions form

Unit of Measure Group

A code (system 46/type UG) that identifies a group of units of measure that you want to process as one for putaway, picking, and replenishment transactions.

You use unit of measure groups to set up movement instructions for putaway, picking, or replenishment.

Setting Up Storage Containers

This section provides an overview of storage containers, and discusses how to:

- Define storage containers.
- Set up allowed containers for each location.
- Set up item standard packs.
- Set up processing options for Item Standard Packs (P460131).
- Set up pallet standard packs.

Understanding Storage Containers

You can use storage containers, such as boxes, canisters, or pallets, to store items while they are in your warehouse. You set up storage containers to specify how much space that the container requires in the storage location. You can also specify which containers are allowed in a particular location. The system uses this information to choose locations during putaway.

Two types of storage containers are available:

- Open or pallet-type containers, which you can overfill to exceed the container's dimensions to create storage space on top of the container
- Closed or box-type containers, which you cannot overfill

You define the dimensions, weight, capacity, and purpose (for example, whether a storage container is shippable) of each container that you want to use in your warehouse. You can also define container pieces and enter Advance Ship Notice information about a shipping container. The system uses this information when choosing locations for putaway and also for transactions that involve other PeopleSoft EnterpriseOne systems.

The system contains predefined container codes that identify various storage containers or shipping cartons, such as codes for packaging, pieces, or expendable containers. If the container codes do not meet your needs, you can add your own codes on User Defined Codes.

The system allows you to put any type of container in a location. However, you can restrict the container types allowed in a location. You can enter a single container code, or you can define a list of allowed containers.

To calculate the space that you need for a storage container, you must define whether the item's container is pallet-type (open) or box-type (closed) on the Item U/M Definition - Capacity Requirements form.

Item Standard Packs

The required quantity of items is called the item standard pack. You can set up the quantity of items in a carton, based on the customer and the item's unit of measure. Using the Item Standard Packs application (P460131), you can set up item standard pack information by specifying the highest or largest item unit of measure that the system places in the first shipping container to be tracked.

You can also set up item standard packs for a group of similar items by using the item dimension group. You use the Select Item Group processing option on the Process tab to specify the default display. When locating records on the Work With Item Standard Packs form (W460131A), you can also choose whether to view item numbers or the item dimension group.

Note. You specify an item's dimension group on the Category Codes form (W4101B) in the Item Master (P4101) or Item Branch (P41026) applications.

The system uses standard pack information to create the carton detail that is used for the Advance Ship Notice. Because a standard pack can vary by Sold To and Ship To values, you can set up item standard packs by Sold To and Ship To values, or both.

You can also enter a recommendation sequence for alternate cartons, which is informational only. If you print labels for a shipment, the system generates a label for each layer that is set up.

The system uses the Standard Pack Recommendation Rules table (F460131) to process standard pack information.

Pallet Standard Packs

You can use the Pallet Standard Packs application (P460132) to specify standard pack quantities for other types of packaging, such as the number of cartons on a pallet. Because a standard pack can vary by Sold To and Ship To values, you can set up pallet standard packs by Sold To and Ship To values, or both.

The system uses the Standard Pack Recommendation Rules table (F460131) to process standard pack information.

Forms Used to Set Up Storage Containers

Form Name	Form ID	Navigation	Usage
Container and Carton Codes Revisions	W46091B	Shipping and Packaging Setup (G46412), Container and Carton Codes Click the Add button on the Work With Container and Carton Codes form.	Define storage containers.
Allowed Containers by Location - Revisions	W46026B	Warehouse System Setup (G4641), Allowed Containers by Location Click the Add button on the Work With Allowed Containers by Location form.	Set up allowed containers for each location.
Work With Item Standard Packs	W460131A	Shipping and Packaging Setup (G46412), Item Standard Packs	Access various forms to set up storage container information.
Item Standard Pack Revisions	W460131C	Click the Add button on the Work With Item Standard Packs form.	Set up item standard packs.
Pallet Standard Pack Revisions	W460132A	Shipping and Packaging Setup (G46412), Pallet Standard Packs Click the Add button on the Work With Pallet Standard Packs form.	Set up pallet standard packs.

Defining Storage Containers

Access the Container and Carton Codes Revisions form.

Container and Carton Codes - Container and Carton Codes Revisions

OK Cancel Form Tools

Warehouse Management Container Management

Branch/Plant 27

Container Code C3 Small Carton

	Width	Depth	Height	UM
Dimensions	12.00	12.00	12.00	IN
Cubes	1.00	FC		
Weight		LB		
Maximum Weight				

Tolerance % 85.00 - 90.00

Ship Priority

Packaging Code

Package Terms

Pkg Responsibility

- ☒ Shipping Container
- ☐ Tote Container
- ☒ Available Carton
- ☐ Dimensionless Carton
- ☐ Expendable Container
- ☐ Container Piece
- ☐ Create Sales Order Charge

Container and Carton Codes Revisions form

Container Code

Enter the code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.

Dimensionless Container

Select to specify whether to use item/UOM dimensions rather than carton dimensions. This enables you to set up the carton as a dimensionless carton. You can create cartons such as "own" or "shrink wrap".

A value of '1' or 'Y' means that the carton dimensions will not be used when calculating the size of the piece. For the calculations of the size of the piece, the Item/UOM Dimensions will be used. A value of '0' or 'N' means that the carton will still be used to determine the size of the piece.

Width

Enter the gross width of the location(s) as defined within the location dimension group, the gross width of an item as defined on the Unit Of Measure Definition form (by item or group), or the gross width of a storage container or shipping container. The unit of measure can be defined on the Branch/Plant Constants - Location Definition form.

Depth	Enter the gross depth of the location(s) defined within the location dimension group, the gross depth of an item as defined in the Unit Of Measure Definition (by item or group), or the gross depth of a storage or shipping container. The unit of measure can be defined in Branch/Plant Constants - Location Definition.
Height	Enter the gross height of the location(s) as defined within the location dimension group, the gross height of an item as defined on the Unit Of Measure Definition form (by item or group), or the gross height of a storage container or shipping container. The unit of measure can be defined on the Branch/Plant Constants - Location Definition form.
Cubes	Enter the gross cubic dimensions of the locations defined within the location dimension group, the gross cubic dimensions of an item as defined in the Unit Of Measure Definition (by item or group), or the gross cubic dimensions of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).
Dimension UM	Enter the user defined code (system 00/type UM) that identifies the unit of measure that the system uses to display dimensions for the warehouse. The system provides the ability to establish inches, centimeters, meters, and so forth, as a measuring standard.
Cubes UM	Enter the user defined code (00/UM) that identifies the unit of measure that the system uses to display volume for this branch/plant. The system inputs a value in this field from Branch/Plant Constants - Page 2 (P410012). You can override this default value.
Weight	Enter the gross weight of one unit of the item in this unit of measure, or the weight of an empty storage container or shipping carton. These values default to the location detail (F4602) and the system uses the values in maximum weight calculations for specified locations during putaway.
Weight UM	Enter the user defined code (00/UM) that identifies the unit of measure that the system uses to indicate weight for this item. You can specify ounces, grams, kilograms, and so on, as weight standards. The system uses this unit of measure for the item or overrides it for an individual item or container.
Maximum Weight	Enter the maximum weight of a carton, including the weight of the carton itself and its contents. You define the maximum weight in the Container and Carton Codes program (P46091). The system uses the defined maximum weight during warehouse cartonization. In addition, the system gives you a warning during the Carton Reorganization process (P4620) if a carton exceeds its maximum weight.
None	Select if you do not want to use this container as a shipping carton or tote container.

Cartonization

Select the Ship Notice tab.

Tolerance %	Enter the minimum percentage of a shipping carton that must be filled before it can be shipped. If the content of the carton does not reach this percentage, the system recommends a smaller carton. The default minimum percentage is 85%.
Ship Priority	Enter a number that identifies this shipping carton's place in the priority list that the system uses to make carton recommendations. When the system

makes a carton recommendation, it uses shipping priority to determine which carton it should choose first, second, third, and so forth. If you want the system to look from large to small containers (downsizing), you should assign priority 1 to the largest container, priority 2 to the next largest, and so forth.

Available Container

Select to specify whether this container is available as a shipping carton for packing picked items. The system uses available containers during carton recommendation.

Shipping Container

Select whether a container is to be used for shipping or as a non-shippable tote.

Tote Container

Select whether a container is to be used for shipping or as a non-shippable tote.

Ship Notice

Select the Ship Notice tab.

Packaging Code

Enter the code corresponding to one of the accepted values in the EDI X12 definition for data element 103. It is a combination of a Packaging Form (3 chars) and a Packaging Material (2 digits).

Package Terms

Enter the user defined code (47/PT) that identifies packaging terms and conditions.

Pkg Responsibility

Enter the user defined code (47/PR) that identifies the agency that is responsible for packaging.

Expendable Container

Select to specify whether a container is expendable and, therefore, can incur a sales order charge.

Container Piece

Select to specify whether a container is a piece of a parent container.

Create Sales Order Charge

Select to specify whether the system creates a charge on the sales order for cartons. The charge is based on carton quantity (which is calculated from carton detail information) and the price setup for the item number that is assigned to the carton.

License Plate

Select the License Plate tab.

Container UM

Enter the user defined code (00/UM) to indicate the unit of measure in which to express a container, for example, CS (case) or BX (box). The system uses this UM to populate the license plate UM field that is used to resolve conflicts during identification of movement instructions for mixed item license plates.

Container Process Grp 1

Enter the user defined code (41/02) that identifies the default Process Group for a License Plate when the Process Groups of the items on the license plate do not match. The system will then use the default Process Group to determine which movement instructions to use for putaway, picking and replenishment.

Container Process Grp 2

Enter the user defined code (41/02) that identifies the default Process Group for a License Plate when the Process Groups of the items on the license plate do not match. The system will then use the default Process Group to determine which movement instructions to use for putaway, picking and replenishment.

Container Process Grp 3 Enter the user defined code (41/02) that identifies the default Process Group for a License Plate when the Process Groups of the items on the license plate do not match. The system will then use the default Process Group to determine which movement instructions to use for putaway, picking and replenishment.

Associated Item

Select the Associated Item tab.

Item Number Enter the number that identifies the empty container. When you specify an item number, the system creates a relationship between the full container and empty container for tracking purposes in the Container Management system.

Setting Up Allowed Containers for Each Location

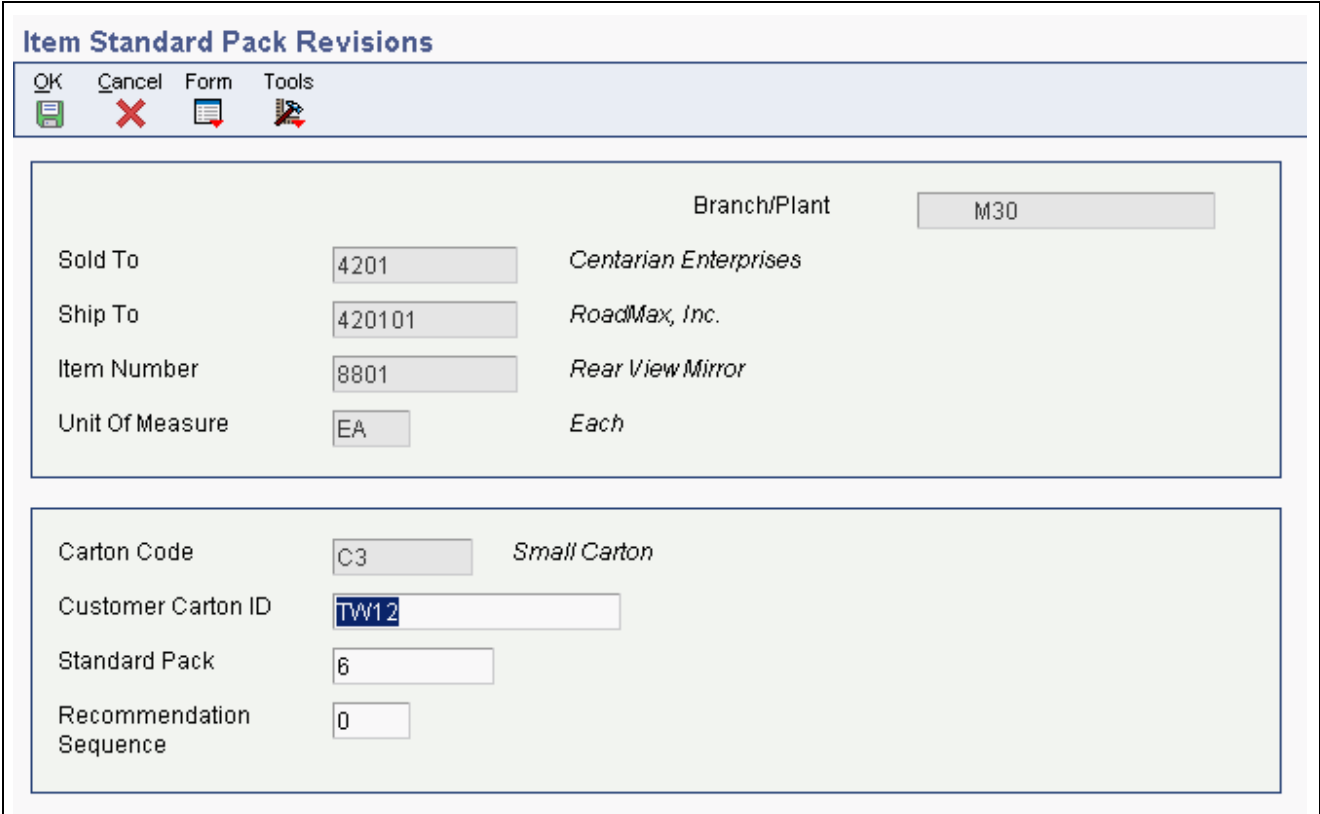
Access the Allowed Containers by Location - Revisions form.

Setting Up Item Standard Packs

On the Work With Item Standard Packs form (W460131A), you can use the following Row exits to process standard pack information.

Row Exit	Usage
Container Codes	Launches the Container and Carton Codes application (P46091). You define the dimensions, weight, capacity, and purpose (for example, whether a storage container is shippable) of each container that you want to use in your warehouse. You can also define container pieces and enter Advance Ship Notice information about a shipping container.
UOM Conversion	Launches the Unit of Measure Conversions - Item application (P41002). You can define a unit of measure structure to process an item. A unit of measure structure describes the relationship between the smallest unit of measure and larger units of measure, such as eaches to boxes, boxes to cases, and cases to pallets.
Container BOM	Launches the Container Bill of Material application (P46098). You can specify the pieces that make up a container. The system uses this information on the Advance Ship Notice.
Pallet Standard Pack	Launches the Pallet Standard Packs application (P460132). You can specify standard pack information for higher-level packaging, such as pallets.
Item UOM Definition	Launches the Item Unit of Measure Definition application (P46011). When the system creates an item standard pack row, it also creates a row in the Item Unit Of Measure Definition table (F46011) for the related item and unit of measure, in order to calculate the gross weight.

Access the Item Standard Pack Revisions form.



Item Standard Pack Revisions

OK Cancel Form Tools

Branch/Plant M30

Sold To 4201 Centarian Enterprises

Ship To 420101 RoadMax, Inc.

Item Number 8801 Rear View Mirror

Unit Of Measure EA Each

Carton Code C3 Small Carton

Customer Carton ID TW12

Standard Pack 6

Recommendation Sequence 0

Item Standard Pack Revisions form

Carton Code

A code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.

Standard Pack

A number that indicates the standard quantity within a container.

Customer Carton ID

A code that the customer uses to represent a carton in the system.

Recommendation Sequence

A number that indicates the order in which a carton is chosen by the system. The system chooses the carton with the lowest recommendation sequence first.

See Also

Setting Up Item Warehouse Information in the Warehouse Management Guide for more information about the item dimension group

Defining Location Capacity in the Warehouse Management Guide for information about specifying the item dimension group

Setting Processing Options for Item Standard Packs (P460131)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Display

Use this processing option to select an item dimension group.

1. Select Item Dimension Group

Use this processing option to specify the default value for displaying information about item numbers or item dimension groups. Values are:

Blank: Display item number information

I: Display item dimension group information

Versions

Use this processing option to specify the version of Item Unit of Measure Definitions (P46011).

1. Item Unit of Measure Definitions (P46011)

Use this processing option to specify which version of Item Unit Of Measure Definition (P46011) to call. You use this version to specify the default display for the application.

Setting Up Pallet Standard Packs

Access the Pallet Standard Pack Revisions form.

Pallet Standard Pack Revisions

OK Cancel Tools

Branch/Plant M30

Sold To 4201 Centarian Enterprises

Ship To 420101 RoadMax, Inc.

Inner Carton C1 Large Carton

Outer Carton CRATE Crate

Customer Carton TW60

Standard Pack 8

Recommendation Sequence 0

Pallet Standard Pack Revisions form

Inner Carton

A code that identifies the container the item is stored on or in when in a location in the warehouse. If an item is stored on or in a container when it is picked, you must update this field for the system to be able to make recommendations for shipping cartons.

Outer Carton

A code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.

Customer Carton

A code that the customer uses to represent a carton in the system.

Setting Up Container Bill of Materials

This section provides an overview of container bill of materials, and discusses how to set up container bill of materials.

Understanding Container Bill of Materials

A container bill of material makes up the pieces of a container, such as drawers, shelves, dividers, and so on. These pieces may also be parent pieces that contain child pieces. For example, a tote may contain drawers, and each drawer may have dividers.

You set up a container bill of material by the branch/plant and container. If the pieces differ by a customer or Ship To value, you must set up separate container codes for each configuration. The system uses the container pieces when processing the Advance Ship Notice.

The Work With Container Bill of Material form (W46098C) displays the container bill of material in a tree structure. The container is the first node, and expanding the node displays the pieces for a container. Because a piece can be made up of one of more pieces, you can continue expanding the tree until the last piece is displayed.

The detail area provides the following information about the container piece:

- Container description
- Container code for the piece
- Piece description
- Quantity
- Branch/Plant

You can delete the child pieces of a container, but if you delete the top node, the system deletes the entire bill of material for the container. Deleting a child piece that contains associated child pieces does not delete those associations. Deleting the container or piece for the bill of material will not delete it from container and carton codes.

The system uses the Container Bill of Material table (F46098) to process information.

Forms Used to Set Up Container Bill of Materials

Form Name	Form ID	Navigation	Usage
Container Bill of Material Revisions	W46098C	Shipping and Packaging Setup (G46412), Carton Bill of Material Click the Add button on the Work With Container Bill of Material form.	Set up container bill of materials.

Setting Up Container Bill of Materials

Access the Container Bill of Material Revisions form.

Container Bill of Material Revisions

OK Delete Cancel Form Tools

Branch/Plant M30

Container Code C1 Large Carton

Records 1 - 2 Customize Grid

	Container Piece Code	Description	Quantity
☒	C4	Extra Small Carton	10
☐			

Container Bill of Material Revisions form

Container Code

A code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.

Container Piece Code

A code that identifies a piece in a parent container.

Setting Up Shipping Cartons

This section provides an overview of shipping cartons, and discusses how to set up shipping cartons.

Understanding Shipping Cartons

You set up shipping cartons to define what cartons exist, which cartons are available, and the percentage of space in the carton that an item can fill. The system uses this information to recommend shipping cartons during picking.

After you have set up a carton and after the carton has been picked, you have the option of reorganizing its contents and its placement within a shipment prior to shipping. The Carton Reorganization program (P4620) not only allows you to reorganize a carton's contents, but also allows you to create and organize new cartons.

Forms Used to Set Up Shipping Cartons

Form Name	Form ID	Navigation	Usage
Container and Carton Codes Revisions	W46091B	Warehouse System Setup (G4641), Container and Carton Codes Click the Add button on the Work With Container and Carton Codes form.	Set up shipping cartons.

Setting Up Shipping Cartons

Access the Container and Carton Codes Revisions form.

Maximum Weight	A number that indicates the maximum weight that is allowed for this location. --- FORM SPECIFIC --- The maximum weight of a carton, including the weight of the carton itself and its contents. You define the maximum weight in the Container and Carton Codes program (P46091). The system uses the defined maximum weight during warehouse cartonization. In addition, the system gives you a warning during the Carton Reorganization process (P4620) if a carton exceeds its maximum weight.
Ship Priority	A number that identifies this shipping carton's place in the priority list that the system uses to make carton recommendations. When the system makes a carton recommendation, it uses shipping priority to determine which carton it should choose first, second, third, and so forth. If you want the system to look from large to small containers (downsizing), you should assign priority 1 to the largest container, priority 2 to the next largest, and so forth.
Shipping Container	A code that indicates whether a container is to be used for shipping or as a non-shippable tote. Values are: <i>Y</i>: Use this container as a shipping carton. <i>N</i>: Do not use this container as a shipping carton. <i>C</i>: Use as a tote. Cartonize to this container for picking. --- FORM SPECIFIC --- A code that specifies whether a container is to be used for shipping or as a non-shippable tote. Values are: <i>Y</i>: Use this container as a shipping carton. <i>N</i>: Do not use this container as a shipping carton. <i>C</i>: Use as a tote. Cartonize to this container for picking.
Available Carton	A code that specifies whether the container is available as a shipping carton for packing picked items. The system uses available containers during carton recommendation. Values are: <i>Y</i>: The container is available as a shipping carton. <i>N</i>: The container is not available as a shipping carton.

See Also

Working with Standard Pack Carton Recommendations in the Warehouse Management Guide for more information

Setting Up Locations for Carton Recommendation

This section discusses how to set up locations for carton recommendations.

Forms Used to Set Up Locations for Carton Recommendations

Form Name	Form ID	Navigation	Usage
Location Profile Revisions	W46020A	Warehouse System Setup (G4641), Location Profile Select a record on the Work with Location Profiles form, and select Profile Revisions from the Form menu.	Set up locations for carton recommendations. You must set up picking locations to allow carton recommendation during picking.

Setting Up Locations for Carton Recommendations

Access the Location Profile Revisions form.

Recommend Crtn

A code that indicates whether the system recommends shipping cartons when it picks from this location. Valid codes are:

Y : Yes, recommend cartons when picking from this location. The system recommends a carton only if you have set up the Carton Recommendation Method for the item.

N: No, do not make carton recommendations when picking from this location.

See Also

Working with Standard Pack Carton Recommendations in the Warehouse Management Guide for more information

Setting Up Carton Recommendation Methods for Items

This section lists a prerequisite, and discusses how to set up carton recommendation methods for items.

Prerequisite

Verify that you have set the processing option for carton recommendation in the Task and Trip Creation program (R46471), which is located on the Warehouse Move Documents menu (G4621).

Forms Used to Set Up Carton Recommendation Methods for Items

Form Name	Form ID	Navigation	Usage
U/M Definition by Item Revisions	W46011A	Warehouse System Setup (G4641), U/M Definition by Item On the Work With U/M Definition by Item form, select a record, and select Revisions from the Row menu.	Set up carton recommendation methods for items. You must set up each item's carton recommendation method in that item's unit of measure definition. You can recommend cartons by item volume or by the percentage of the carton that the item fills.

Setting Up Carton Recommendation Methods for Items

Access the U/M Definition by Item Revisions form.

Carton Rcmd Method

A code that indicates the method the system uses to recommend a carton for the specified item in this unit of measure. Valid codes are:

Blank: Do not recommend cartons for the specified item in this unit of measure

1: Recommend shipping cartons for the specified item in this unit of measure based on the volume of the item and the volume of the shipping carton

2: Recommend shipping cartons for the specified item in this unit of measure based on the percentage of the shipping carton that the item and unit of measure occupy

You define the dimensions of the carton through Container and Carton Codes (P46091). You define an item's dimensions through Item/Unit of Measure Profile (P46011).

See Also

Working with Standard Pack Carton Recommendations in the Warehouse Management Guide for more information

Setting Up Carton Fill Percentages for Items

This section provides an overview of carton fill percentages for items, lists a prerequisite, and discusses how to set up carton fill percentages for items.

Understanding Carton Fill Percentages for Items

Each item can fill a portion of each available shipping carton. If you choose cartons according to the percentage of the carton that an item occupies, you must define how much of each carton's space that a particular item can fill.

If you store the item in a container, you must specify each valid container. The fill percentage that you enter should take into account the dimensions of the item's container.

Prerequisite

Verify that you have set the processing option for carton recommendation in the Task and Trip Creation program (R46471), which is located on the Warehouse Move Documents menu (G4621).

Forms Used to Set Up Carton Fill Percentages for Items

Form Name	Form ID	Navigation	Usage
Item/Carton Recommendation Rules Revisions	W46013B	To set up an individual item, Warehousing Movement Rules (G46311), Item/Carton Setup by Item To set up an item dimension group, Warehousing Movement Rules (G46311), Item/Carton Setup by Group On the Work with Item/Carton Recommendation Rules form, select a record and select Rules Revisions from the Row menu.	Set up carton fill percentages for items.

Setting Up Carton Fill Percentages for Items

Access the Item/Carton Recommendation Rules Revisions form.

Fill Percentage

The percentage of space in a carton that a single quantity of the unit of measure will occupy. If the item is in a container when you pick it, this percentage indicates how much space the container will take up in the carton.

The system uses the fill percentage if you use fill percentage as the carton recommendation method for the item's unit of measure. You define an item's carton recommendation method through Unit of Measure Definition by Item/Item Group (P46011).

Working with Standard Pack Carton Recommendations

This section provides overviews of standard pack carton recommendations and carton charges for expendable containers, lists prerequisites, and discusses how to:

- Activate standard pack recommendations.
- Revise standard pack carton recommendations.
- Revise carton quantities.
- Calculate round to standard pack.

- Set processing options for Standard Pack Carton Recommendations (P4615).
- Add cartons to a shipment.
- Reorganize cartons and items in a shipment.
- Review carton detail information.
- Set processing options for Carton Reorganization (P4620).
- Run the Carton Recommendations report (R46151).
- Set up carton charges for expendable containers.

Understanding Standard Pack Carton Recommendations

You can use the Standard Pack Carton Recommendations application (P4615) to generate carton detail. A carton recommendation summarizes the number and weight of pallets or cartons, and can make carton and pallet recommendations.

If an item is packed in two different types of cartons there will be two separate lines for the item on the Work With Carton Recommendations form. This form summarizes on each detail row the shipment number, item, and the innermost and outermost carton. The row for the innermost carton will have a blank outer carton.

For example, a carton recommendation would list the following information in the Carton Hierarchy form:

- Shipment number
- Type of cartons
- Total number of cartons and pallets needed
- Weight of items and cartons
- Customer carton ID

You can manually change the recommendations when an expendable or alternate packaging is used. You can manually change recommendations using Standard Pack Carton Recommendations as long as carton detail has not been created for the shipment. No automatic changes can occur to carton recommendations after you have manually changed a carton recommendation.

Packaging is based on the rules for standard pack. Recommendations will be across all sales orders on a shipment, meaning, a carton can hold the same item number from multiple sales orders and a pallet can hold cartons from multiple sales orders.

The system will not recommend mixed cartons. Only parts with the same item number will be put in an innermost carton. If the system does not find standard pack information for an item, the system adds the item as a loose piece on the shipment (based on the transaction unit of measure). If an inventory storage container is setup for the item in the warehouse management module, it will be the default container for the loose piece but it will not have a customer carton number.

Note. Carton recommendations impact the Transportation Management, Sales Order Management, and Demand Scheduling systems. The system creates carton recommendations during the shipment creation process and updates recommendations automatically when a shipment changes.

The Warehouse Management system does not recognize the carton recommendations created for standard packs, and you can process standard packs with the Warehouse Management system on or off. To ensure that sales orders remain out of the Warehouse Management system, you can set up a separate status flow for the order types that use standard pack recommendations. You should exclude the order type status from the inclusion rules used to create warehouse requests.

The system generates the recommendation when creating shipments, based on the type of order established in the Document Type Master table (F40039) and whether you have activated carton recommendation processing for the document type in the Document Type Maintenance application (P40040). When you activate carton recommendations, you can:

- Turn on standard pack recommendations. The system recommends the innermost carton and any additional packaging layers that are set up in standard pack rules.
- Specify the Carton Creation Status. This is the status for recommendations created by the system.
- Specify the Carton Change Status. The status for recommendations that have been manually changed or Carton Detail has been created. Once the carton is at this status, the system will not automatically re-calculate packaging recommendations if the sales order quantity is changed for an item.

The system also uses the following tables for processing carton recommendations:

- Carton Recommendations (F4615)
- Carton Detail Information (F4620)
- Container and Carton Codes (F46091)
- Shipment Header (F4215)
- Shipment Detail (F4942)
- Document Type Master (F40039)

Partial Cartons and Pallets

You can use partial cartons when you are not using standard pack rounding for demand scheduling. Cartons may contain smaller cartons or items, but you cannot mix items in the same immediate carton.

The system considers pallets as any packaging that is in addition to the innermost carton. If you create carton detail using carton recommendations, you can set the Allow Partial Pallets for Carton Detail processing option on the Process tab to prohibit the creation of partial pallets. If you do not allow partial pallets, the system does not create a pallet if there are not enough cartons to make a full pallet. In this case, the system creates cartons as loose pieces on the shipment. The pieces can be put on a pallet later during staging using the Carton Reorganization (P4620) application. This option is useful when loose pieces will be built onto a mixed pallet.

The following scenarios are examples of partial pallet processing when you do not allow partial pallets:

- If there are ten cartons per pallet but only five cartons are being shipped, the system uses carton detail to create five loose cartons, and the pallet would not be written to carton detail.
- If there are two boxes per carton and ten cartons per pallet, but only nineteen boxes are being shipped, the system creates nine cartons with two boxes per carton, for a total of eighteen boxes and one loose box. The system does not write the pallet to carton detail because there are not enough cartons to make a full pallet. A carton was not created to hold the loose box because it would have been a partial carton.

Carton Hierarchy

You can review in a tree structure the contents of a carton for a shipment. The first line represents the carton type you entered. If the carton type has a plus sign, you can drill down to the next container, and do so until the lowest container is displayed. The form displays additional information about the container on the selected line, such as:

- Standard pack
- Inner carton code
- Inner carton quantity

- Item number
- Item description
- Item quantity
- Unit of measure
- Customer carton ID
- Branch plant

Round to Standard Pack

You can use the Standard Pack Calculator form (W4615E) to display standard pack information for items or cartons and change their quantities. You can override the values for the standard pack and produce useful planning calculations to review how the system will build standard packs and how pallets are affected when you change quantities.

You calculate the number of cartons and pallets that will be needed based on the following values:

- Sold To
- Ship To
- Item
- Unit of measure
- Quantity

Carton Detail

You can expand a carton recommendation and revise the details. For example, suppliers use expendable containers when they run out of returnable containers. Typically the cost is charged to the customer. You can add additional packaging costs to a sales order and override carton detail with the changed information. The container information (including any expendables) must be reported on the ASN.

Carton detail includes information such as the label serial number, shipment number, carton type, standard pack quantity, and sales order lines that make up the carton. The detail also describes the relationship between shipping cartons, such as which cartons are on a specific pallet.

When you create carton detail, the system expands the carton recommendation and builds detail records for each carton. The system allocates items to sales order lines and links the data to the transportation tables.

Sales Order

The following table is an example of a sales order:

Order	Line	Shipment	Item	UOM	Quantity
1	1	1234	210	EA	20

Standard Pack Carton Recommendations (P4615, F4615)

The following table is an example of carton detail:

Shipment	Item	UOM	Carton Type	Pieces	Standard Pack	Quantity
1234	210	EA	Carton	4	5	20
1234	-	-	Pallet	2	2	4

Carton Reorganization (P4620) (Carton Detail Information (F4620))

The following table continues the example:

Shipment	Serial #	Carton Type	Item	Quantity	Order	Line
1234	1213	Pallet	-	-	-	-
1234	4213	Carton	210	5	1	1
1234	4214	Carton	210	5	1	1
1234	2214	Pallet	-	-	-	-
1234	4315	Carton	210	5	1	1
1234	4316	Carton	210	5	1	1

You can create carton detail using the following methods:

Method	Usage
Scanning	You can use third party or custom modification used for data collection and scanning to automatically create carton detail.
Standard Pack Carton Recommendations (P4615)	You can use carton recommendations to create carton detail when scanning is not used. After you create carton detail, the system displays the Carton Reorganization form (W4620C). You can review or revise the carton details of a shipment. You can access accurate weight calculations, review the carton detail status and label information, and reorganize the items within a carton. You can also modify individual items within a carton.

Note. Changes you make in this application affect carton detail, not sales detail. You should not create carton detail until after running the Print Pick Slips program (R42520). Pick slips may split the sales order line, and the system does not update line splits to the sales order information in carton detail from this process.

The system uses information from carton detail to generate the Demand Scheduling Bill of Lading (R49116), label data and ASN information. The system uses the following tables to process carton detail:

- Carton Detail Information (F4620)
- Carton Recommendations (F4615)

- Sales Order Detail File (F4211)
- Shipment Header (F4215)

Reorganization

After you have set up a carton and after the carton has been picked, you have the option of reorganizing its contents and its placement within a shipment prior to shipping. The Carton Reorganization program (P4620) not only allows you to reorganize a carton's contents, but also allows you to create and organize new cartons, as well as allocate carton quantities to sales orders.

When you are working with cartons, you might need to reorganize the cartons in the following ways:

- Add new cartons to a shipment
- Consolidate one carton into another carton
- Split the contents of one carton into two cartons
- Change the level of one carton to another carton level (for example, you might change a box to a pallet)
- Update the carton status reconciliation

When you are working with the contents of a carton, you might need to reorganize items in the following ways:

- Move items from one existing carton to another within a shipment (for example, you might move a group of items onto a pallet)
- Move an entire quantity, in a particular unit of measure, to another carton (for example, you might move one case of canned goods from one carton to another)
- Move a partial quantity, in a particular unit of measure, to another carton (for example, you might move half of a case of canned goods from one carton to another)
- Move items from an existing carton to a new carton (for example, you might remove four tires from a pallet and place them inside a carton)
- Remove a carton from a parent carton and designate the removed carton as another parent-level carton
- Remove an item from a carton, leaving the item outside of any cartons

The system automatically calculates weight limit information when you reorganize a carton. If you set the appropriate processing option, the system displays a warning if the carton that you have reorganized exceeds its weight limit.

When you are moving items within a shipment, you can set the appropriate processing option in the Carton Reorganization program (P4620) to allow you to specify the quantity of the item that you are moving. If you leave the processing option blank, the system assumes that you want to move the entire quantity of the item.

PeopleSoft recommends that you set the appropriate processing options in the Carton Reorganization program to create or update the following tables:

- Carton Detail Information (F4620)
- SO Pack Confirm Detail (F4216)
- Shipment Pieces (F4943)
- Shipment Reference Numbers (F4217)

These tables contain detailed information about cartons, their contents, and the shipping and tracking information that needs to be created or updated every time you create or reorganize a carton. For example, by setting the appropriate processing options, you ensure that you are maintaining current UCC 128 compliance information in your system and can provide your customers with ASNs (advance ship notices) and bar-coded shipping container labels. ASNs communicate the contents of a shipment to a customer. When the customer receives the shipment, the customer scans the bar-coded container labels on the contents of the shipment and matches the contents to the ASN as part of an automated receipts process.

After you create or reorganize cartons in a shipment, you also might want to review carton detail information. The Carton Detail Inquiry program (P4621) enables you to review the following types of carton detail information:

- Carton identification information
- Item information
- Weight and dimension information
- Related sales order information
- UCC 128 information

When you revise carton details, the system calculates accurate weight values and updates the carton detail status. Use the processing options on the Status tab in the Carton Reorganization (P4620) to specify how the system processes the statuses.

You can use the Form menu on Carton Reorganization to confirm sales order lines. This allows you to correct carton data if the line level reconciliation fails or a change is made to quantity shipped during confirmation.

Note. Changes you make in this application affect carton detail, not sales detail.

Carton Recommendations Report (R46151)

You can run the Carton Recommendations Report (R46151) to analyze and review carton recommendations and specific shipment information. The system displays separate pages with header information for each shipment number when processing multiple shipment numbers.

You can run this report either during the pack pick slip process or as a standalone batch application. The system uses the Carton Recommendations table (F4615) for processing this report.

See Also

Confirming Shipment in the Warehouse Management Guide for more information about using Shipment Confirmation (P4205)

Reconciling Inbound Shipment Information in the Warehouse Management Guide

UCC 128 Compliance in the Sales Order Management Guide

Understanding Carton Charges for Expendable Containers

You can set up billable charges for expendable cartons and track the cartons as inventory, similar to tracking a stock item. At shipment confirmation, the system creates a sales order line for each line on the order that has an item packed in a carton with the Create Sales Order Charge (CSOC) field set to 1. You assign this field value to a carton type in the Container and Carton Codes application (P46091). The system carries this value forward to the carton detail.

You can base the charge on either the item quantity or the number of expendable containers used. The following table describes how the system processes carton-based and item-based charges.

Charges Based On	Process
Carton Quantity	The system writes a sales order line using the line type Carton (CA). This line type allows you to relieve the carton as inventory at sales update while excluding the carton in the data selection for the ASN, which prevents the carton charge from being extracted to the ASN as a line item. Ensure that you do not include this order type/line type combination in UDC 49/SD, in order to prevent the carton charge lines from being placed onto a new shipment. The order quantity reflects the number of cartons being shipped. Because outer cartons do not always contain sales order information, this information comes from the first inner carton record found with populated sales order information. Additionally, when a carton contains multiple sales order lines, the system associates the charge with the first sales order line found in the carton detail.
Item Quantity	The system writes two sales order lines. The first line is a stock line containing the actual number of cartons. The system uses the line type Carton Inventory (CI) for inventory relief during sales update. The system prevents advanced pricing from processing this line by setting the price to zero and the price override flag to 1. Another line type Carton Charge (CC) is used to write the sales order lines holding the carton charges. This order type/line type combination must also not be included in UDC 49/SD to prevent the system from assigning the line a new shipment number.

The system records the charge lines in the Related Order Cross Reference table (F4080) to provide a link between the carton charge sales order lines and the item's sales order line. This link allows the system to roll up charges for the ASN. The system includes the charge on the Advanced Ship Notice (ASN), but does not extract the charge to the ASN when running the EDI Advanced Ship Notice Extraction program (R47032). The system receives this number on the inbound 850 document for purchase orders.

You must set up the following versions for Sales Order Entry (P4210) in order to process expendable containers.

Version	ZJDE0019	ZJDE0020	ZJDE0021
Version Title	Carton Charges by Carton Quantity	Carton Inventory Relief based on Item Quantity	Carton Charges by Item Quantity
Description	Writes sales order lines based on carton quantities.	Relieves carton inventory based on item quantity.	Writes sales order lines based on item quantity.
Order Type	S4	S4	S4
Line Type	CA	CI	CC
Override Next Status	580	620	580
Line Number Increment	.01	.01	.01

Version	ZJDE0019	ZJDE0020	ZJDE0021
Status Code Limit for Changes	560	560	560
Inventory Commitment Checking	Blank = Bypass Availability Checking	Blank = Bypass Availability Checking	Blank = Bypass Availability Checking

The system uses the following tables for processing carton charge information:

- Carton Detail Information (F4620)
- Container and Carton Codes (F46091)
- Related Order Cross Reference (F4080)

Example: Carton Charges Based on Carton Quantity

The following table shows the Sales Order Detail File table (F4211) after the system creates carton charges at shipment confirmation when the charge is based on carton quantity. The outer carton does not contain sales order information, and therefore the system retrieves this information from the sales order information found on the first inner carton.

Order Number	Line Number	Line Type	Item Number	Order Quantity	Location	Price	Extended Price
1	1.000	S	Item A	750	1.A.1	25.00	18,750
1	1.010	CA	7890	1	-	5.00	5
1	1.020	CA	8741	1	-	5.00	5
1	2.000	S	Item A	250	1.B.1	25.00	6,250
1	2.010	CA	7890	1	-	5.00	5

The CA (Carton) line type indicates that the line type is identical to the stock line type. This line type allows you to relieve the carton as inventory at sales update and to exclude the charge from the EDI Advanced Ship Notice Extraction (R47032). The system writes these lines using the sales order entry version for carton-based quantities.

After the system writes the sales order lines, the lines and parent lines are added to the Related Order Cross Reference table (F4080) when you run the EDI Advanced Ship Notice Extraction program.

In this example, the Related Order Cross Reference table would appear as follows:

Related Order Set ID	Related Order ID	Order ID	Product Code	Order Number	Order Line Number	Item Number (Carton)
1	1	1	42	1	1.000	-
1	1	2	42	1	1.010	7890
1	1	3	42	1	1.020	8741

Related Order Set ID	Related Order ID	Order ID	Product Code	Order Number	Order Line Number	Item Number (Carton)
1	2	1	42	1	2.000	-
1	2	2	42	1	2.010	7890

Example: Carton Charges Based on Item Quantity

The following table shows the Sales Order Detail File table (F4211) after the system creates carton charges at shipment confirmation when the charge is based on item quantity.

Order Number	Line Number	Line Type	Item Number	Order Quantity	Location	Price	Extended Price	Price Override
1	1.000	S	Item A	750	1.A.1	25.00	18,750	-
1	1.010	CI	7890	1	-	0.00	0	1
1	1.020	CI	8741	1	-	0.00	0	1
1	1.030	CC	7890	250	-	5.00	1,250	-
1	1.040	CC	8741	750	-	5.00	3,750	-
1	2.000	S	Item A	250	1.B.1	25.00	6,250	-
1	2.010	CI	7890	1	-	0.00	0	1
1	2.020	CC	7890	250	-	5.00	1,250	-
1	2.030	CC	8741	250	-	5.00	1,250	-

The CI (Carton Inventory) line type (a user defined value) indicates that the carton is identical to the stock line type. A CI line type allows you to relieve the carton as inventory at sales update and to exclude the charge from the EDI Advanced Ship Notice Extraction (R47032) process. The system writes these lines using the inventory-relief sales order version for carton-based quantities.

For the non-stock lines containing the carton charge, the system writes the lines using the inventory-relief sales order version for item-based quantities. After the system writes the sales order lines, the lines and parent lines are added to the Related Order Cross Reference table (F4080) when you run the EDI Advanced Ship Notice Extraction (R47032) program.

In this example, the Related Order Cross Reference table would appear as follows:

Related Order Set ID	Related Order ID	Order ID	Product Code	Order Number	Order Line Number	Item Number (Carton)
1	1	1	42	1	1.000	-
1	1	2	42	1	1.030	7890

Related Order Set ID	Related Order ID	Order ID	Product Code	Order Number	Order Line Number	Item Number (Carton)
1	1	3	42	1	1.040	8741
1	2	1	42	1	2.000	-
1	2	2	42	1	2.020	7890
1	2	3	42	1	2.030	8741

See Also

Confirming Shipment in the Warehouse Management Guide for more information about using Shipment Confirmation (P4205).

Reconciling Inbound Shipment Information in the Warehouse Management Guide.

Prerequisites

Before you complete the tasks in this section:

- Ensure that you have set up the user defined code Carton Status (46/RS).
- Activate the Enable Creation of Sales Order Lines for Carton Charge processing option on the Process tab of the confirmation source, such as:
 - Transportation Shipment Confirmation (P49645)
 - Batch Transportation Shipment Confirmation (R49500)
 - Transportation Load Confirmation (P49640)

Forms Used to Use Standard Pack Carton Recommendations

Form Name	Form ID	Navigation	Usage
Document Type Revisions	W40040B	Inventory Setup (G4141), Document Type Maintenance Click the Add button on the Work With Document Type form.	Activate standard pack recommendations.
Standard Pack Recommendation Revisions	W4615C	Shipping and Packaging Management (G4615), Carton Recommendations On the Work With Carton Recommendations form, locate the record and click Select.	Revise standard pack carton recommendations.

Page Name	Object Name	Navigation	Usage
Carton Recommendation Fix/Inspect	W4615F	On the Standard Pack Recommendation Revisions form, select Change Carton or Add Parent from the Row menu.	Revise carton quantities or add a parent carton.
Delete Carton Recommendation	W4615G	On the Standard Pack Recommendation Revisions form, select Delete Carton from the Row menu.	Delete a carton. You can delete only cartons that have no parents or children. Deleting a carton leaves loose items on the shipment.
Carton Hierarchy	W4615D	On the Work With Carton Recommendations form, locate the record and choose Carton Tree from the Row menu.	Review carton hierarchy.
Standard Pack Calculator	W4615E	On the Work With Carton Recommendations form, select Standard Pack Calculator from the Form menu.	Calculate round to standard pack.
Carton Reorganization	W4620C	On the Work With Carton Recommendations form, select a record and select Carton Detail from the Row menu. On Carton Recommendations - Processing Shipment #, click OK.	Create carton detail. Reorganize cartons and items in a shipment.
Carton Detail Add/Update	W4620B	Shipping and Packaging Management (G4615), Carton Reorganization Select a record on the Work with Shipment Cartons form, and click Select. Click the Add button on the Carton Reorganization form.	Add cartons to a shipment. If you want to send an ASN to the customer, first add the appropriate statuses to the order activity rules for order type S4S in the Order Activity Rules program (P40204).
Carton Detail	W4621B	Outbound Warehousing Operations (G4612), Carton Detail Inquiry Select a record on the Carton Detail Inquiry form, and click Select.	Review carton detail information.

Page Name	Object Name	Navigation	Usage
Allocate SO Quantity	W4620G	Select a record and click Select on the Work with Shipment Cartons form. Click the Allocate SO Qty button on the Carton Reorganization form.	Allocate carton quantities to sales order lines. Click Allocate All to allocate all cartons on the shipment to matching sales order lines. Click Allocate Open to allocate only the cartons that do not currently have sales order information.
Carton Charge Reference Setup Revisions	W46201B	Shipping and Packaging Setup (G46412), Carton Charge Reference Setup Click the Add button on the Work with Carton Charge Reference Setup form.	Set up carton charges for expendable containers.

Activating Standard Pack Recommendations

Access the Document Type Revisions form.

The screenshot shows the 'Document Type Revisions' form. At the top, there are buttons for 'OK', 'Cancel', and 'Tools'. Below this, the 'Document Type' is set to 'S4' with the description 'Sales Order - Transportation'. A navigation bar includes tabs for 'Inventory', 'Sales', 'Procurement', 'SWM', 'Work Order Definition', and 'Shipping', with 'Shipping' currently selected. The main section is titled 'Standard Pack Carton Recommendations' and contains two status fields: 'Carton Creation Status' with value '10' and label 'Created', and 'Carton Change Status' with value '20' and label 'Changed'. A checkbox labeled 'Recommend Standard Packs' is checked.

Document Type Revisions form

Carton Creation Status

A user defined code (46/RS) that specifies which status the system uses when creating cartons in the Carton Recommendations table (F4615).

- Carton Change Status**

A user defined code (46/RS) that specifies which status the system uses when changing cartons in the Carton Recommendations table (F4615).

If a recommendation has been changed, the system does not automatically re-calculate recommendations when a sales order is changed.
- Recommend Standard Packs**

This option turns carton recommendations for standard packs on or off at the order type level.

See Also

Setting Up Document Type Information in the Inventory Management Guide for information about document types

Revising Standard Pack Carton Recommendations

Access the Standard Pack Recommendation Revisions form.

Standard Pack Recommendation Revisions

Work With Carton Recommendations

Standard Pack Recommendation Revisions

OK

Cancel

Delete Carton

Row

Previous

Next

Tools

Item Summary

Weight Summary

Shipment Number

1240

Item Number

MD1

MD1

Total Quantity

5

EA

Each

Records 1 - 1

Customize Grid

	Qty Of Cartons	Carton Type	Standard Pack Qty	Inner Carton Quantity	Inner Carton	Item Quantity	UM	Item Number	Net Weight
	5	C1	1			5	EA	MD1	24,000.00

Standard Pack Recommendations Revisions form

- Qty Of Cartons**

The number of pieces, pallets, containers, etc. which make up a shipment.

For shipments that do not have piece information defined in the Pieces table (F4943), the system calculates the estimated piece count by converting the quantity in the transaction unit of measure to the shipping unit of measure.

To obtain the whole piece number, the system rounds the unit of measure down.

The weight and volume of the leftover quantities from all detail lines are added and the sum total is divided by the maximum piece weight and/or volume.

The system rounds the resulting piece weight or volume up to the next whole number. This number is added to the whole piece number to obtain the piece count.

Carton Type	A code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.
Standard Pack Qty	A number that indicates the standard quantity within a container.
Inner Carton Quantity	The total quantity in primary unit of measure for this location detail.
Inner Carton	A code that indicates whether a carton is located inside a larger carton.
Item Quantity	The total quantity in primary unit of measure for this location detail.
UM	A user defined code (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).
Item Number	A number that the system assigns to an item. It can be in short, long, or third item number format.
Net Weight	The weight of goods currently in a location. The system calculates this amount from the weight from the item/unit of measure profile and the weight of the container if the level 1 unit of measure for this location detail has a storage container.
Tare Weight	The gross weight of one unit of the item in this unit of measure, or the weight of an empty storage container or shipping carton. These values default to the location detail (F4602) and the system uses the values in maximum weight calculations for specified locations during putaway.
Gross Weight	The gross weight of one unit of the item in this unit of measure, or the weight of an empty storage container or shipping carton. These values default to the location detail (F4602) and the system uses the values in maximum weight calculations for specified locations during putaway.
Wt UOM	A user defined code (00/UM) that identifies the unit of measure that the system uses to indicate weight for this item. You can specify ounces, grams, kilograms, and so on, as weight standards. The system uses this unit of measure for the item or overrides it for an individual item or container.
Customer Carton	A code that the customer uses to represent a carton in the system.
Carton Item Number	A number that identifies a carton as an item. When you specify an item number, the system creates a relationship between the item number and the carton code for tracking and pricing purposes.
Rec Status	A user defined code (46/RS) that indicates the status of standard pack recommendations.
Branch Plant	A code that identifies a separate entity within a business for which you want to track items and costs. This entity might be a warehouse location, job, project, work center, or branch/plant. The Branch/Plant field is alphanumeric.

Revising Carton Quantities

Access the Carton Recommendation Fix/Inspect form.

Carton Recommendations - Carton Recommendation Fix/Inspect

OK

Cancel

Tools

Carton Recommendation Information

Qty Of Cartons

10

Carton Type

Standard Pack Qty

Item Qty

10.0000

Item Number

220

EA

Customer Carton ID

Carton Recommendation Fix/Inspect form

Calculating Round to Standard Pack

Access the Standard Pack Calculator form.

Carton Recommendations - Standard Pack Calculator

OK

Find

Cancel

Tools

Sold To

20

Ship To

20

Item Number

10101

Total Quantity

100

%

Branch/Plant

30

Display

Item

Carton

No records fetched.

Customize Grid

Carton Type	Qty Of Cartons	Standard Pack	Inner Carton	Inner Carton Quantity	Item Number	UM	Item Quantity	Customer Carton

Standard Pack Calculator form

- UM

A user defined code (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).
- Item Quantity

The total quantity in primary unit of measure for this location detail.
- Item

Select this option to view calculated packaging based on the item information.
- Carton

Select this option to view calculated packaging based on the type of carton.

Setting Processing Options for Standard Pack Carton Recommendations (P4615)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process

Use this processing option to specify whether to allow partial pallets when creating carton detail.

1. Allow Partial Pallets for Carton Detail	Use this processing option to determine whether the system allows partial pallet processing when you are working with carton detail information. Values are: <i>Blank:</i> Do not allow partial pallet processing. <i>1:</i> Allow partial pallet processing.

Versions

Use this processing option to specify the version for Carton Reorganization (P4620).

1. Version of P4620 Carton Reorganization	Use this processing option to specify which version of the Carton Reorganization program (P4620) that the system uses. If you leave this processing option blank, the system uses version ZJDE0001.

Display

Use these processing options to specify whether to display the shipment status.

1. From Shipment Status	Use this processing option to specify a start value for the range of a shipment status code. The system uses this value for data selection when loading records to the detail area. If you leave this processing option blank, the system does not perform data selection that is based upon shipment status.
2. To Shipment Status	Use this processing option to specify an end value for the range of a shipment status code. The system uses this value for data selection when loading records to the detail area. If you leave this processing option blank, the system does not perform data selection that is based upon shipment status.

Adding Cartons to a Shipment

Access the Carton Detail Add/Update form.

Carton Detail Add/Update form

To add cartons to a shipment:

1. On Carton Detail Add/Update, complete the following fields:
 - Carton Code
 - Number of Cartons
2. To manually assign a pack number, complete the Serial Number field:
3. If you want the system to automatically assign tare and pack numbers, choose either or both of the following options:
 - Generate Tare SSCC
 - Generate Pack SSCC
4. To save the new cartons that you added to the shipment, click OK.
5. On Carton Reorganization, review the cartons that you added.

The system displays the number of cartons that you added at the bottom of the shipment's list of contents.

The cartons that you added are empty. Next, you must reorganize the other cartons or items within the shipment so that the new cartons have contents. Otherwise, when you confirm the reorganization, the system automatically deletes any empty cartons from the shipment.

Carton Code A code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.

Number of Cartons The number of units that the system applies to the transaction.

Serial Number The pack level Serialized Shipping Container Code. Must conform to the UCC structure for SSCC numbers.

Generate Tare SSCC An option that indicates what type of serial number will be generated for a carton. Values are:

- Enter a Serial Number

The system uses this value for the carton.

- Generate Tare SSCC

The system generates a new Tare SSCC number and applies it to this carton.

- Generate Pack SSCC

The system generates a new Pack SSCC number and applies it to this carton.

- Generate Label Next Number

The system generates a new Label Next Number and applies it to this carton.

- Generate Electronic Product Code

The system generates a new Electronic Product Code and applies it to this carton.

Generate Pack SSCC

An option that indicates what type of serial number will be generated for a carton. Values are:

- Enter a Serial Number

The system uses this value for the carton.

- Generate Tare SSCC

The system generates a new Tare SSCC number and applies it to this carton.

- Generate Pack SSCC

The system generates a new Pack SSCC number and applies it to this carton.

- Generate Label Next Number

The system generates a new Label Next Number and applies it to this carton.

- Generate Electronic Product Code

The system generates a new Electronic Product Code and applies it to this carton.

- Generate EPC numbers

The system generates a new EPC number and applies it to this carton.

- Generate label Next numbers

The system generates a new Label Next Number and applies it to this carton.

Reorganizing Cartons and Items in a Shipment

Access the Carton Reorganization form.

Carton Reorganization

Select Add Confirm Cancel Unusable Labels Allocate SO Qty Form Row Tools

Branch/Plant 30

Shipment Number 116

Records 1 - 11

Carton / Item	Carton Code	Item Quantity	UM	Weight	Maximum Weight	Wt Um	Serial Number	Order Number	Or Ty	Doc Co	Line Num
Shipment # 116											
+ 1040	C1	0			100	OZ	1123326423				
+ 1041	C1	0			100	OZ	1123326423				
+ 1042	C1	0			100	OZ	1123326423				
+ 1043	C1	0			100	OZ	1123326423				
+ 1044	C1	0			100	OZ	1123326423				
+ 1045	C1	0			100	OZ	1123326423				
+ 1046	C1	0			100	OZ	1123326423				
+ 1047	C1	0			100	OZ	1123326423				
+ 1048	C1	0			100	OZ	1123326423				
+ 1049	C1	0			100	OZ	1123326423				

Carton Reorganization form

Note. If an EPC number is Generated, this form also displays an EPC Column

To reorganize cartons and items in a shipment:

- Perform any of the following tasks:
 - To place a carton or item inside another carton, click the carton to be moved and drag and drop the carton on top of the parent carton. Click the plus sign next to the parent carton to review its contents.
 - To remove a carton or item from one carton and place it in another carton, click the plus sign next to the parent carton, click the carton or item to remove, and drag and drop the carton or item on top of the new parent carton. If you are moving an item and have set the appropriate processing option to allow movement of partial quantities of an item, you must specify the quantity of the item to be moved on the Item Move Quantity form. If the processing option is turned off, the system assumes that you want to move the entire quantity and does not display the Item Move Quantity form.
 - To remove a carton or item from a parent carton and place the carton or item at a parent level, drag and drop the carton or item on top of the shipment icon at the top of the shipment contents list. The system places the carton or item at the bottom of the shipment contents list. If you are moving an item and have set the appropriate processing option to allow movement of partial quantities of an item, you must specify the quantity of the item to be moved on the Item Move Quantity form. If the processing option is turned off, the system assumes that you want to move the entire quantity and does not display the Item Move Quantity form.
- To update a carton, shipment or item, choose the item and click Select.
- On Carton Detail Add/Update, complete the following fields as necessary:
 - Carton Code
 - Serial Number
- Choose one of the following options and click OK:
 - Type in a Serial Number

- Generate Tare SSCC
- Generate Pack SSCC
- Generate Label Next Number

On Carton Reorganization, the system displays the updated information.

- Generate EPC Number

5. Click Confirm.

Reviewing Carton Detail Information

Access the Carton Detail form.

Show Items In A Carton	An option that specifies the type of processing for an event.
Show Hierarchy Of A Carton	An option that specifies the type of processing for an event.
Carton ID	A system-assigned number that identifies each carton. The system uses this number for the picking, packing, and shipment processes.
Item Number	A number that the system assigns to an item. It can be in short, long, or third item number format.
Gross Weight	Essentially a memo field at present, this value is intended to reflect the fact that many inventory items are always packaged in the same way for shipment to the customer. This packaging in turn effectively adds to the shipment weight for the item. Since much of the mainstream freight calculations depend upon a weight basis for their accuracy, the ability to store a gross weight which reflects the estimated additional weight of standard packaging was deemed to be a worthwhile enhancement. (Future Use)
Order Number	A number that identifies a document. For example, the document can be a purchase order, invoice, or sales order.
UPC	The Universal Product Code number which must conform to the UCC structure for UPC numbers.

Setting Processing Options for Carton Reorganization (P4620)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Processing

1. Create Transportation Shipping Pieces table (F4943).

An option that specifies the type of processing for an event.

Blank: Do not create Transportation Shipping Pieces.

I: Create Transportation Shipping Pieces.

2. Create Shipment Tracking Numbers (F4217).

A flag that indicates that data is case sensitive.

Blank: Do not create Shipment Tracking Numbers.

I: Create Shipment Tracking Numbers.

Note. Processing option to create Transportation Shipping Pieces table must be turned on in order for this processing option to take affect.

3. Use Label Serial Number Preference values instead of values defined on the Serial Number tab.

A code that indicates whether the Label Serial Number Preference (Advanced Preference #38) will be used in place of the P4620 Serial Number Processing Option tab. Valid values are:

Blank: Do not use Label Serial Number Preference.

I: Use Label Serial Number Preference.

Defaults

1. Allow partial quantity Item Moves.

Everest event point processing flag 04.

Blank: Assume Item Moves are for the entire quantity of the item and UOM.

I: Prompt for a quantity when performing Item Moves.

2. Allow Carton Code changes.

A flag that indicates whether automatic spell check is turned on.

Blank: Do not allow carton code changes.

I: Allow carton code changes.

3. Error if carton is over weight.

An option that specifies the type of processing for an event.

Blank: A warning will be issued.

I: A hard error will be issued.

4. Allow Add Items to Carton Detail for a shipment.

Use this processing option to allow items to be added to carton detail. The sales order must be updated separately.

Blank: Do not allow addition of items.

I: Allow addition of items.

5. Allow Remove Items from the Carton Detail for a shipment.

Use this processing option to allow removal of items from carton detail. The sales order must be updated separately.

Blank: Do not allow removal of items.

I: Allow removal of items.

Status

1. Enter the Shipment Status at or beyond which changes cannot be made to cartons.	A code that represents the status that a shipment is at. Statuses typically refer to events such as "Confirmed", "Hold", etc.
2. Enter the Sales Order Line Status at or beyond which changes cannot be made to cartons.	A code (system 40/type AT) specifying the last step in the processing cycle that this order line has successfully completed.
3. Enter the Carton Status to update cartons to.	A user defined code (46/CS) that the system assigns to a carton. Each status code represents a different stage in the distribution cycle.
4. Enter the Carton Status at or beyond which changes cannot be made to cartons.	A user defined code (46/CS) that the system assigns to a carton. Each status code represents a different stage in the distribution cycle.
5. Enter the Carton Status for Reconciled Cartons.	Use this processing option to specify the status for reconciled cartons.

Serial Number

1. Serial Number Creation process value.	A code that indicates what type of serial number will be generated for cartons. Valid values are: <i>Blank:</i> Do not create serial numbers for cartons. <i>1:</i> Create serial numbers based on the UCC-128 standard. <i>2:</i> Create serial numbers from next numbers setup in P4625 Label Next Numbers. <i>3:</i> Create serial numbers based on Electronic Product Code, EPC, standard. <i>4:</i> Create two serial numbers, one following the UCC-128 SSCC standard and the other following the Electronic Product Code, EPC, standard. <i>5:</i> Create two serial numbers, one following the setup in P4625 Label Next Numbers and the other following the Electronic Product Code, EPC, standard.
2. Company UCC Code to use for SSCC Number generation.	A code that indicates what type of Company UCC Code to use for SSCC Number generation Values are: <i>Blank:</i> The first UDC entry for 41/UC will be used.
3. Document Type to use to retrieve the Serial Number for SSCC Number generation.	A user defined code (00/DT) that identifies the origin and purpose of the transaction. PeopleSoft reserves several prefixes for document types, such as vouchers, invoices, receipts, and timesheets. The reserved document type prefixes for codes are: <i>Blank:</i> Next number 40/08 will be used.
4. Document Key Company to use to retrieve the Serial Number for the SSCC number generation.	A number that, along with order number and order type, uniquely identifies an order document (such as a purchase order, a contract, a sales order, and so on). If you use the Next Numbers by Company/Fiscal Year facility, the Automatic Next Numbers program (X0010) uses the order company to retrieve the correct next number for that company. If two or more order documents have

the same order number and order type, the order company lets you locate the desired document.

If you use the regular Next Numbers facility, the order company is not used to assign a next number. In this case, you probably would not use the order company to locate the document.

Blank: Next number 40/08 will be used.

5. Function to use for SSCC number generation. Function Generate SSCC Number is available.

A code for SSCC number generation

Blank: No SSCC Number generation can be performed.

6. Function Name to use for SSCC number validation. Function Calculate UCC128 Check Digit is available.

A code for SSCC name generation

Blank: No SSCC number validation can be performed.

7. Use Carton Label Preference.

A code that indicates whether to use the Carton Label Preference (Advanced Preference #39) or not. The Carton Label Preference can be used to determine which carton types (setup in P46091) are assigned serial numbers. If the preference is not being used, serial numbers will be assigned to all cartons. If UCC-128 SSCC numbers are being created, the preference can be setup to generate either a Tare or Pack SSCC for the carton type. Valid values are:

Blank: Do not use Carton Label Preference.

I: Use Carton Label Preference.

Running the Carton Recommendations Report (R46151)

To run the Carton Recommendations report, select Shipping and Packaging Management (G4615), Carton Recommendations Report.

Setting Up Carton Charges for Expendable Containers

Access the Carton Charge Reference Setup Revisions form.

Carton Charge Reference Setup - Carton Charge Reference Setup Revisions

OK Cancel Tools

Sold To 1001 Recipient 1

Ship To 1001 Recipient 1

Deliver To 1001 Recipient 1

Item Number 1001
Bike Rack - Trunk Mount

Customer Purchase Order 123456

Charge Reference

Charge Based On

☒ Carton Quantity

☐ Item Quantity

Carton Charge Reference Setup Revisions form

- Customer Purchase Order** An alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.
- Charge Reference** A number that identifies the charge amount.
- Carton Quantity** A code that indicates whether the system calculates the carton charges using the number of cartons that are shipped or the number of items that are shipped inside the cartons.
- Item Quantity** A code that indicates whether the system calculates the carton charges using the number of cartons that are shipped or the number of items that are shipped inside the cartons.

See Also

Defining Storage Containers in the Warehouse Management Guide for more information about activating the Create Sales Order Charge option

Processing Options for Sales Order Entry (P4210) in the Sales Order Management Guide for information about specifying versions for sales order processing

Setting Up UCC 128 Processing

This section provides an overview of UCC 128 processing, lists prerequisites, and discusses how to:

- Set up hierarchical configurations.
- Set up ship notice/manifest requirements.
- Set up item information.

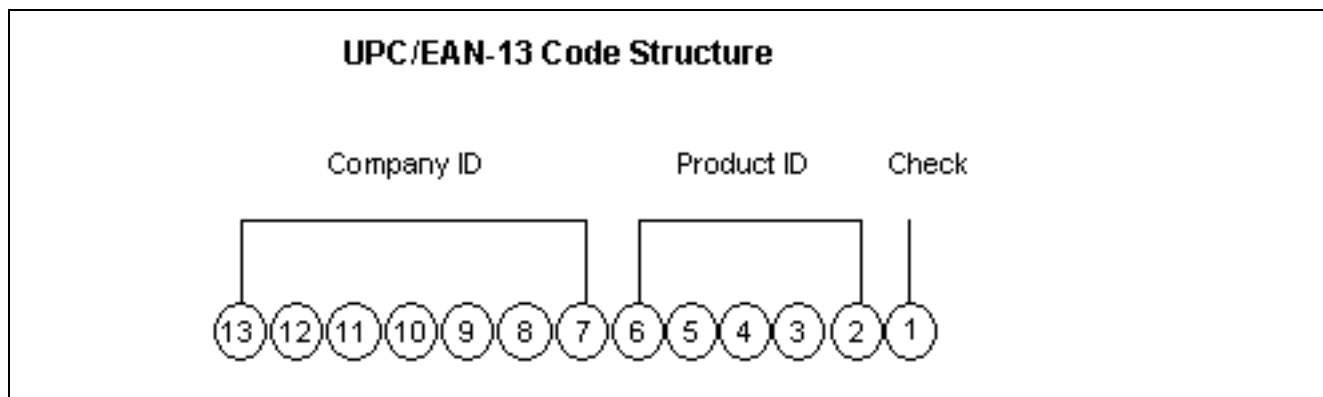
Understanding UCC Identification Codes

Each company can assign product identification codes. The Uniform Code Council (UCC), the Electronic Commerce Council of Canada (ECCC), and the EAN (outside of Canada and the United States) assign member companies the company identification. In the company identification codes, the first digit is the region code. For North America, the region code is 0. Therefore, the company identification can be seven digits if you include the first digit 0. Because each UCC code contains the company number, all numbers are unique.

Universal Product Code (UPC)

Each company can assign the Universal Product Code (identified as UPC in North America and EAN-13 outside of North America) to both a consumer unit and the lowest saleable unit for a specific product. For example, a can of soda would have the UPC identification on the can because it can be sold individually. The UPC code is a fixed code that identifies one unit of a specific product.

The following graphic illustrates the structure of UPC code:



UPC/EAN-13 Code Structure

The UPC code is made up of the following:

- A single-digit check character.
- A 5-digit Product ID assigned by the company.
- A 7-digit company (or manufacturer) ID that is assigned by the UCC/EAN. For North American companies, the company ID is represented by only 6 characters, since the leading 7th digit is always 0 and can be left off the code.

Typically, a company will maintain its own product identification codes for internal use but will cross-reference the internal product identification codes to the UPC code.

Shipping Container Code (SCC)

Companies assign the Shipping Container Code (identified as the SCC-14 in North America and EAN-14 outside of North America) to an intermediate pack for a specific product. For example, cans of soda are sold in various configurations. One possible configuration is four six-packs in each case. Therefore, the case would have an intermediate pack identifier (SCC-14) on it.

The Shipping Container Code, like the UPC, is a fixed code that identifies the specific number of consumer packs of a specific product. The SCC code on the case of soda represents four consumer packs, each with six sodas or a total of 24 sodas.

The SCC-14 code is made up of the following:

- A single-digit check character.
- A 5-digit Product ID assigned by the company.
- A 7-digit company (or manufacturer) ID assigned by the UCC/EAN.
- A single-digit Packaging Indicator that identifies the packaging. This identifier is assigned by the company and may vary from product to product. This identifier is fixed and has the following values:
- 0 indicates that the Product ID on the SCC is not the same as the product identification on the UPC codes contained within the package.
- 1 - 8 indicates company-defined packaging. For example, for soda, a 1 might mean a case containing six packs and a 2 might mean a case containing 12-pack boxes.
- 9 indicates that the amount of product inside the package varies from package to package even though there is the same product identification in the UPC codes of the consumer pack contained within the package.

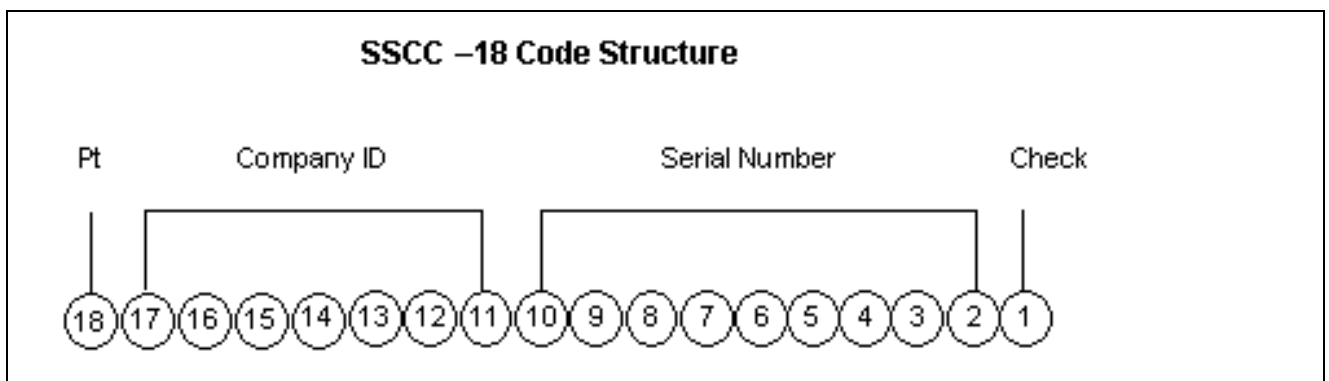
In the system, an SCC code is equivalent to an item code for a specific unit of measure. For any item, there would be one UPC code but several SCC codes.

Serial Shipping Container Code (SSCC)

Serial Shipping Container Code (SSCC-18) is a unique serial number that is assigned to cartons or shipping containers, including entire truckloads or shipments.

The SSCC code is a variable code that can be a hierarchical structure of SCCs and UPCs. The code is a key to a database record. For example, an SSCC may be put on a pallet that has 10 cases of soda and 10 cases of juice.

The following graphic illustrates the structure of SSCC-18 code:



SSCC-18 Code Structure

The SSCC-18 code is made up of the following:

- A single-digit check character.
- A 9-digit serial number that identifies the shipping method that is assigned by the company.
- A 7-digit company (or manufacturer) ID that is assigned by UCC/EAN.
- A single-digit packaging type. This identifier is fixed and has the following values:
- 0 indicates the shipping container is a case or carton

- 2 indicates that shipping container is a pallet (larger than a case)
- 3 indicates the shipping container is undefined
- 4 indicates the shipping container that is used internally for intra-company use
- 5 - 9 are reserved for future use

To process orders that comply to UCC 128 specifications, you must set up customer and item information. For example, you can define customer preferences for transmitted information and standard identification codes for your products.

Customer Information

You must set up customer specifications that are maintained for UCC 128 Compliance. These specifications might include the customer-specific format for transmitted information and additional UCC 128 processing information, such as transportation equipment, routing, and reference numbers.

Hierarchical Configurations for Customer Information

When you transmit order information, you can establish a format that relays the information about the shipment, the orders within the shipment, and the items within the order. You define hierarchical configurations to transmit information that meets your customers' needs.

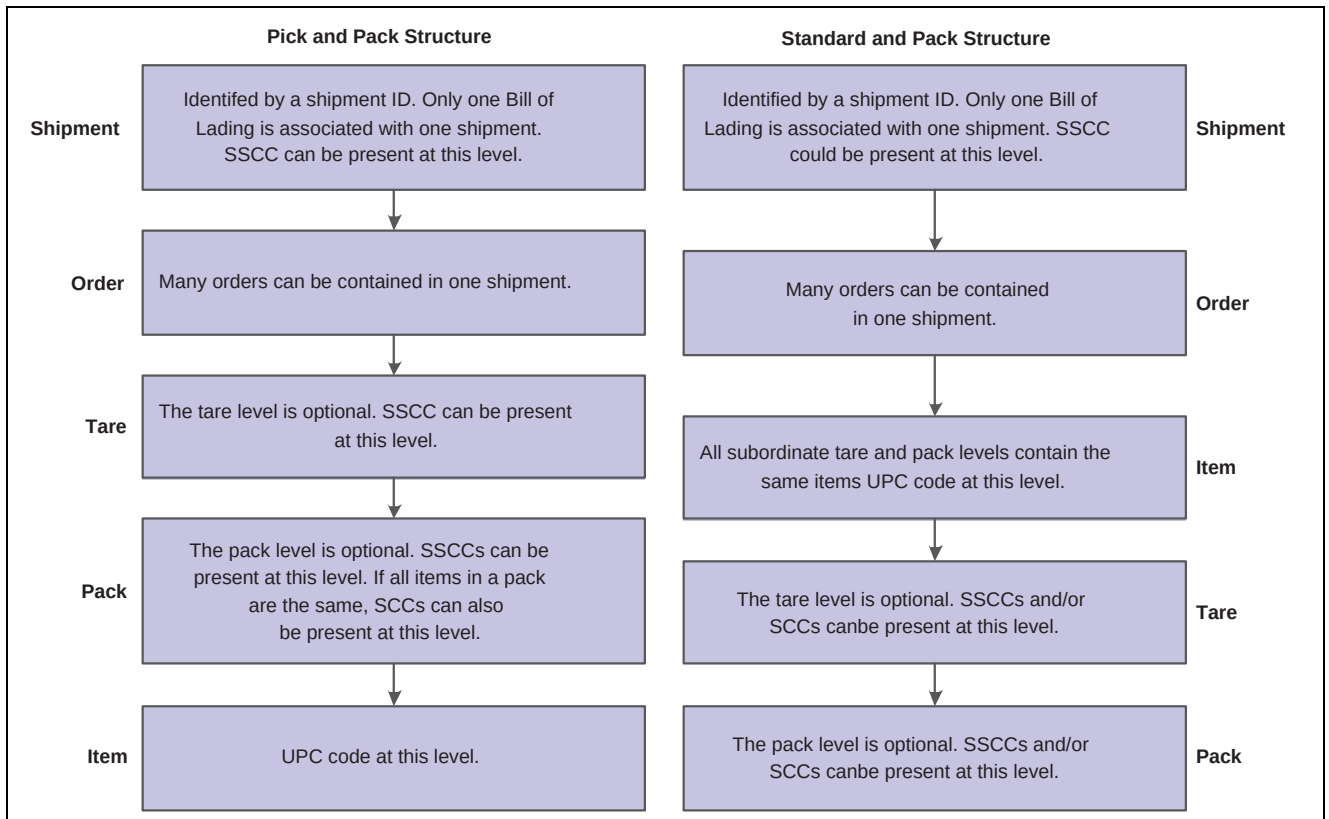
You can set up any structure based on your business needs. The following are examples of hierarchical structures:

Structure	Usage
Pick and Pack	This is the most flexible configuration because you can combine products at the tare and pack levels.
Standard Carton Pack	Within this configuration, there can only be one UPC present in subordinate tare and pack levels.

Within the configurations, you can define hierarchies based on the customer preferences. The following are examples of configuration levels:

Level	Usage
Shipment (S)	There can only be one Shipment level in each transaction set that is transmitted. This contains information such as the bill of lading number, ship to, and sold from information.
Order (O)	The order level contains information related to the supplier's sales order and the customer's purchase order.
Tare (T)	The optional tare level contains information related to pallets and other large product collections.
Pack (P)	The optional pack level contains information related to intermediate packs.
Item (I)	The item level contains information about the product that is shipped, such as UPC number and quantity.

One customer may need shipment, order, item information, in that order, while another may prefer shipment, order, tare, pack, item information, in that order. You define hierarchical configurations to transmit information that meet your customer's needs.



Hierarchical Configurations/Pick and Pack Structure

Item Information

You must provide the system with information about the items that you stock. When you enter item master information, you provide the system with details such as:

- Item identifiers
- Item descriptions

For UCC 128 processing, your item identifiers can be the UPC or SCC codes that you assign to the product unit and intermediate packs.

Using Package Indicators

If you are setting up the SCC, use the following Packaging Indicators to identify the type of packaging:

- 0 indicates that the Product ID on the SCC is not the same as the product identification on the UPC contained within the package. You can use this product identifier for kits.
- 1-8 indicates company-defined packaging. For example, for soda, a 1 might mean a case containing six packs and a 2 might mean a case containing 12-pack boxes.
- 9 indicates that the amount of product inside the package varies from package to package even though there is the same product identification in the UPC of the consumer pack contained within the package. The system does not support variable unit of measures.

Setting Up Aggregate SCCs

You can set up aggregate SCCs to represent kits with noninventory components. A kit is a collection of inventory items, called components, that are associated with a description name, called a parent item. The aggregate SCC represents the parent item. You can access the Item Cross-Reference Revisions form to assign component UPCs to the aggregate SCC for the kit. You only enter cross-reference information for non-inventory items. For example, you do not stock bandages, an item for which you do not record inventory or UPCs. You do sell first aid kits, which include bandages. Depending on your customer requirements, you can enter the aggregate SCC for the first aid kit and item cross-reference information for the components, such as bandages, that make up the first aid kit.

If the components are inventory items, you do not have to enter cross-references. When you enter an order for a kit, the system retrieves the kit information, which includes the component UPCs, from the Item Master table (F4101).

To set up identification for kits with non inventory items, you can set up an SCC with a product identifier equal to 0, which indicates that the SCC is not the same as the product identification on the UPCs it contains. To assign the UPCs to the aggregate, you can enter information in the Item Cross-Reference field.

On Item Cross Reference, you must enter the cross-reference type, UP, to indicate UPCs. The cross-reference item number is the UPC code and the cross-reference description is the unit of measure.

Prerequisites

Before you complete the tasks in this section:

- Set up your UCC-assigned vendor number in user defined codes (41/UC).
- Verify that you have set up your shipping document types in user defined codes (49/SD).

See Also

Planning Transportation Shipments in the Transportation Management Guide for more information about setting up your company's shipping information

UCC 128 Compliance in the Sales Order Management Guide

Forms Used to Set Up UCC 128 Processing

Form Name	Form ID	Navigation	Usage
Hierarchical Configuration Definition Revisions	W47HLD	Shipping Notice (G47215), Hierarchical Configuration Definition Click the Add button on the Work With Hierarchical Configuration Definition form.	Set up hierarchical configurations.
Customer Master Revision	W03013B	Sales Order Management Setup (G4241), Customer Billing Instructions On the Work With Customer Master form, select a record and click Select.	Set up ship notice/manifest requirements. You can assign the hierarchical configuration according to your customer's requirements. For example, you can specify additional UCC 128 information, such as transportation equipment, routing, and reference numbers. If you set up shipping information for UCC 128 compliance, you enter information on the Customer Ship Notice tab.
Storage/Shipping	W4101D	Inventory Master/Transactions (G4111), Item Master On the Work With Item Master Browse form, select a record and select Storage/Shipping from the Row menu.	Set up item information.

Setting Up Hierarchical Configurations

Access the Hierarchical Configuration Definition Revisions form.

Address Number	A number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.
Hierarchical Configuration	The EDI 856 transaction set hierarchy configuration codes that specify the levels present in the Ship Notice/Manifest. This field is made up of a combination of 2 character Hierarchical Level Codes (values from the X12 specification for data element 735 - Hierarchical Level Code). There can be up to 9 combinations of HLC's in this field.
Hierarchical Structure Code	A code indicating the hierarchical application structure of an EDI transaction set that utilizes the HL segment to define the structure of the transaction set.
Level	A number used to organize the table into a logical group for online viewing and reporting.

Field Name

The data dictionary item name. Examples include F#MMCO or F#CO for company; F#MMCU or F#MCU for business unit; and F#RP01-30 for business unit category codes 01 through 30.

Special characters are not allowed as part of the data item name, with the exception of #, @, \$.

If you want to create protected data names that software updates will not overwrite, use \$xxx and @xxx, where xxx is user defined.

Note about DREAM Writer: On the Processing Options Setup form, the field name is used during data entry to edit the field size and other field attributes.

Ascending Descending

A code to designate sorting sequence as ascending or descending. The following codes apply:

A: Ascending

D: Descending

Note. For use within OPNQRYP command to designate the UNIQUEKEY parameter. The number of key sequence fields specified with the following codes represent the number assigned to the UNIQUEKEY parameter. This parameter eliminates duplicate records for the specified keys.

U: Ascending

V: Descending

Total Level

A level break, not to be confused with Account Master or Business Unit Master level of detail concept (see LDA and LDM respectively). You may specify the level of totaling that you wish to place on this field. Up to 9 levels of totals are permissible. If levels of totals are not specified in an order consistent with the sequence parameters, unpredictable results will occur.

For example:

Level 01 - Department Totals - Sort Sequence 03

Level 02 - Branch Totals - Sort Sequence 03

Level 03 - Division Totals - Sort Sequence 01

Level 10 - Grand Totals

If you specify the same totaling level on more than one data field, you must enter a 1 in the 1st position of total level for all secondary fields.

For example:

Level 01 - Business Unit (description comes from here)

Level 11 - Object (description ignored)

Level 11 - Subsidiary (description ignored)

Setting Up Ship Notice/Manifest Requirements

Access the Customer Master Revision form.

Setting Up Item Information

Access the Storage/Shipping form.

To set up item information:

1. On Work With Item Master Browse, locate the item and choose Storage/Shipping from the Row menu.
2. On Storage/Shipping, click the UCC 128 tab.
3. Complete the following fields for UPCs:

- UPC
- UPC Number

You can enter UPCs and SCCs with product identifiers 1-8.

In the system, an SCC is equivalent to an item code at a specific unit of measure. For any item, there would be one UPC but several SCCs.

- SCC(PI=1)
 - SCC(PI=2)
 - SCC(PI=3)
 - SCC(PI=4)
 - SCC(PI=5)
 - SCC(PI=6)
 - SCC(PI=7)
 - SCC(PI=8)
4. To set up item information for a kit, complete only the following fields:
 - Default Aggregate UPC UOM
 - SCC(PI=0)
 5. To assign UPCs for non-inventory components to the aggregate SCC, choose Item Cross Ref. from the Form menu.
 6. On Item Cross Reference Revisions By Item, complete the steps to enter item cross-reference information.

Working with Label Information

This section provides an overview of label information, lists prerequisites, and discusses how to:

- Set up additional outbound label information.
- Set up label next numbers.
- Enter unusable label information.
- Run the Purge Unusable Label Numbers program (R4622P).
- Run the Allocating Sales Orders to Carton by Shipment program (R46155).
- Set processing options for Allocate Sales Orders to Cartons by Shipment (R46155).

- Reconcile inbound shipment information.

Understanding Label Information

The system and third parties can exchange detailed carton information that describes the physical shipment. Third parties must send inbound label information describing the physical shipment such as label serial number, relationship of packaging (such as cartons on a pallet), and carton type.

You generate outbound label data from system tables to a third party for formatting and printing. The outbound label information includes the Ship To address, EDI data and demand scheduling data, such as the supplier or plant code (Party Type 1 and 2).

You can produce label output as follows:

- From demand scheduling by using CUM Maintenance (P40R12)
- From Carton Detail Inquiry (P4621) if the carton detail has been created from carton recommendations or other methods
- From Sales Order Entry (P4210) if you are not using demand scheduling

Note. If you specify output for a carton or sales detail, the label data is for the entire shipment.

Then the third party labels, stages or builds pallets, assigns labels to shipments and performs tasks such as label verification during scanning.

The third party sends data generated from the label process back to the PeopleSoft system. The system stores the label data in the Carton Detail Information table (F4620). This table must be updated with accurate information from the physical shipment, because the system uses this information to create packaging information on the ASN and the Bill of Lading.

Through shipment carton reconciliation you can use scanning to verify that the shipment item quantity matches the carton detail item quantity, and then correct discrepancies.

What If the Scanned Carton Quantity is Less Than the Sales Order Quantity?

Changes to carton detail are not reflected in the sales detail and vice versa.

To pass reconciliation, you can:

- Decrease the sales quantity by changing demand
- Decrease sales quantity in shipment confirmation
- Add cartons to carton detail

What If the Scanned Carton Quantity is Greater Than the Sales Order Quantity?

To pass reconciliation, you can:

- Increase sales quantity by changing Demand
- Increase sales quantity in ship confirm
- Remove cartons from carton detail

The system uses the following tables for processing label information:

- Additional Demand Label Data (F40R31)
- Unusable Label Numbers (F4622)

- Label Next Numbers (F4625)
- Demand Detail (F40R11)
- Sales Order Detail File (F4211)
- Shipment Header (F4215)
- Carton Detail Information (F4620)

Label Preferences

You must set up the following advanced preferences for processing label information:

Preference	Usage
Label Processing (Preference Type 37)	You use this preference to activate label processing at the branch/plant level. You specify the party ID (values for Party Type 1 and 2) in the Demand Addresses table (F40R14) to retrieve for outbound label data. An example of a party ID is the supplier code or plant code. For inbound label data, you specify the version for Carton Reorganization (P4620), and specify whether to automatically allocate sales order quantity to cartons. You must also specify the response function, which is the name of the third party that processes the XAPI response.
Label Serial Numbers (Preference Type 38)	You use this preference to specify the label next number for outbound and inbound labels, as well as UCC128 information for inbound labels, including: • Company UCC code • SSCC document company • SSCC document type • Label generation function • Label validation function

Note. You also use preferences to activate automatic sales order allocation. If this processing is not active, you can allocate sales order information after scanning is complete but before shipment confirmation by using the Allocate Sales Orders to Cartons by Shipment (R46155) program or through an option in Carton Reorganization (P4620).

Outbound and Label Processing

For outbound label information, the system provides label information for the GM1724 label standard. You can specify whether to generate label serial numbers from label next numbers, or they can be generated externally. You set up label next numbers by branch/plant or use a default branch/plant value. The system sends the label number in the outbound label data but does not store this information in the system until after third-party scanning, when the carton detail is created. The third party stores and validates the label serial number.

The system does not format data for a label, print the label or create the barcode that is printed on the label. It is up to the third parties to determine if that data describes what is physically on the pallet and whether to use that information on the label. Third parties are responsible for carton counts on labels, label format, printing, barcode, pallet staging, and label verification.

You can use the Additional Label Data application (P40R31) to set up additional data for the outbound label message. This data includes the branch/plant, Sold To and Ship To values, the column name and table name that contains the column to use for the label, as well as supplemental data for categorizing values such as approval steps or requisition requirements.

Inbound Label Processing

You use inbound label processing when you are ready to scan. The system reads the third-party XML document and updates information to carton detail. The XML document contains label information and a label action code that specifies how to process the information. After you process the information, the system sends a response back to the third party with a completion message and any warning or errors. The third party processes this response.

You can use a commitment boundary to handle errors during scanning. For example, cartons are placed on a pallet and then shrink wrapped. Then the cartons are scanned on the pallet from top to bottom, but you discover a maximum weight error. The commitment boundary provides the option of:

- Not committing any of the cartons on the pallet and re-scanning the cartons after removing some of them.
- Committing the cartons on the pallet as scanned (even with errors) and then submitting a scan to remove the cartons.

You set up the commitment boundary choice during implementation. If the boundary is zero, the system writes transactions to carton detail with errors. If the boundary is greater than zero, the system processes transactions within a boundary as a group. If there is an error, the system does not write transactions in the boundary to carton detail. All the transactions in the boundary are returned in the XML response when using a boundary greater than zero.

The exception is unusable label numbers because those transactions update a different table, which occurs even when there are errors in the boundary.

Inbound Shipment Information

You reconcile shipments to compare item quantities on the shipment to the item quantities in the carton detail. During reconciliation, the system automatically advances the carton status in carton detail to the next user-defined status, such as Complete. You can use the carton status to enforce the shipment to pass reconciliation before confirming the shipment. Reconciling is an optional step.

Places where you can begin reconciliation include:

- Third party reconciliation performed after scanning
- Manual reconciliation using the Allocate Sales Orders to Cartons by Shipment program (R46155)
- Carton Reorganization application (P4620)

You can reconcile shipments when you begin scanning the labels for the shipment. The labels are linked to the carton detail, and the system retrieves the detail row that matches the shipment number, item, Ship To, and quantity.

If you find discrepancies while reconciling shipments, you can add or remove sales order lines from the shipment or adjust item quantities using the Carton Reorganization application. After the item quantities have been balanced, you can perform the reconciliation again in order to update the carton status. Review the Workcenter for messages containing the specific items that failed. The shipment is reconciled when the carton status is at Complete. You can use the Enter the Carton Status for Reconciled Cartons processing option on the Status tab in the Carton Reorganization to set the reconciled carton status.

The system uses the Carton Detail Information table (F4620) to process information when you reconcile shipments.

Prerequisites

Before you complete the tasks in this section:

- Set up the user defined codes for Additional Label Tables (40R/TN) and Additional Label Supplemental DB Codes (46/AL).

Note. The display mode for the supplemental data type must be C.

- Set up user defined code Unusable Label Reason Code (46/UL).

See Also

Advanced Preferences in the Sales Order Management Guide for information about setting up advanced preferences

Working with Shipments in the Sales Order Management Guide for information about Shipment Confirmation (P4205)

Reorganizing Cartons and Items in a Shipment in the Warehouse Management Guide for more information about Carton Reorganization (P4620)

Running the Allocate Sales Order to Carton by Shipment Program (R46155) in the Warehouse Management Guide

Submitting Label Information in the Demand Scheduling Guide

Forms Used to Work with Label Information

Form Name	Form ID	Navigation	Usage
Additional Label Data Revision	W40R31B	Shipping and Packaging Setup (G46412), Additional Label Data Click the Add button on the Work With Additional Label Data form.	Set up additional label outbound information.
Label Next Number Revision	W4625B	Shipping and Packaging Setup (G46412), Label Next Numbers Click the Add button on the Work With Label Next Numbers form.	Set up label next numbers.
Unusable Label Number Revision	W4622B	Shipping and Packaging Management (G4615), Unusable Label Numbers On the Work With Unusable Label Numbers form, select a record and click Select.	Enter unusable label information. You can add or update label serial numbers that are unusable because of errors or damages in packaging. The system uses the Unusable Label Numbers table (F4622) to process unusable label information.
Work With Shipment Cartons	W4620A	Shipping and Packaging Management (G4615), Carton Reorganization	Reconcile a shipment. Select Reconcile Detail from the Row menu.

Setting Up Additional Outbound Label Information

Access the Additional Label Data Revision form.

Additional Label Data Revision

OK Delete Cancel Tools

Sold To: 4360 Allen Supplies Branch/Plant: M30

Ship To: 4360 Allen Supplies

Records 1 - 2 Customize Grid

Table Name	Table Name Description	Column Name	Column Name Description	SDB Code	Ty Dt	SDB Code Name
F40R13	Demand Packaging	PKGWT	Packaging Weight			

Additional Label Data Revision form

Table Name

A code that represents the name of the table containing the column that the system uses for a label.

Column Name	A descriptive remark for the label.
SDB Code	A user defined code (00/SD) that sets up databases for groups of related supplemental data types. This code differentiates the supplemental data types for various systems. For example, the Employee (E) supplemental database contains data types that you use to track additional employee information, such as education and job skills. If you specified that the Supplemental Data table (F00092) is a table name for UDC 40R/TN, complete this field; otherwise this field must remain blank.
Ty Dt	A code that you assign to supplemental data so that you can group data by categories. Values include: <i>A</i>: Approval steps <i>B</i>: Requisition requirements <i>C</i>: Interview process <i>N</i>: Requisition notes
SDB Code Name	A user defined name or remark.

Setting Up Label Next Numbers

Access the Label Next Number Revision form.

Entering Unusable Label Information

Access the Unusable Label Number Revisions form.

Label Data Identifier	A value that specifies the type of label for the advance ship notice (ASN).
Reason Code	A user defined code (46/UL) that explains why a label serial number is unusable.
Container Code	A code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.
Customer Carton ID	A code that the customer uses to represent a carton in the system.
Container Item Number	A number that the system assigns to an item. It can be in short, long, or third item number format.

Running the Purge Unusable Label Numbers Program (R4622P)

To run the Purge Unusable Label Numbers program (R4622P), select Shipping and Packaging Management (G4615), Purge Unusable Label Numbers.

You can use this batch program to delete rows from the Unusable Label Numbers table (F4622). Use data selection to configure how the system purges the records.

Running the Allocating Sales Orders to Carton by Shipment Program (R46155)

To run the Allocating Sales Orders to Carton by Shipment program (R46155), select Shipping and Packaging Management (G4615), Allocate Sales Orders to Cartons.

After third-party scanning process is complete, you can automatically allocate the quantity of a sales order to cartons in order to link a sales order line for the Advance Ship Notice and carton tracking. You can use the processing options to specify whether to allocate all quantities or allocate remaining quantities and whether to update the Carton Detail Information table (F4620). You can also use this program to reconcile cartons against the shipment.

Setting Processing Options for Allocate Sales Orders to Cartons by Shipment (R46155)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Processing

Use these processing options to specify how the system allocates sales order quantities and reconciles carton detail.

1. Allocate Sales Order Quantity	Use this processing option to specify whether the system allocates sales order detail information to all cartons in the shipment or only to those cartons to which no allocation has taken place.
2. Reconcile Carton Detail	Use this processing option to specify whether the system reconciles the item quantity for a shipment in the Carton Detail Information table (F4620) with the item quantity for the matching shipment in the Shipment Detail table (F4942). A summary quantity for each item on the shipment is calculated from both tables and then compared. If the summary quantities do not match, the items do not reconcile. The system issues a general error and sends a detailed error messages to the user's Work Center Inbox. Values are: <i>Blank:</i> The system does not reconcile summary item quantities by shipment. <i>1:</i> The system reconciles summary item quantities by shipment and issues an error if the quantities do not match.

Versions

Use this processing option to specify the version for Carton Reorganization (P4620).

1. Carton Organization (P4620)	Use this processing option to specify which version of the Carton Reorganization program (P4620) that the system uses. If you leave this processing option blank, the system uses version ZJDE0001.

Status

Use this processing option to specify the status for reconciled cartons.

1. Reconciled Carton Status

Use this processing option to specify the status for reconciled cartons. The cartons status is updated for all of the cartons on the shipment when all of them have been reconciled successfully. If cartons are reconciled, then a reconciled carton status is required.

Reconciling Inbound Shipment Information

Access the Work With Shipment Cartons form.

See Also

Confirming Shipments in the Sales Order Management Guide

Reorganizing Cartons and Items in the Shipment in the Warehouse Management Guide

Setting Up License Plate Processing

This section provides an overview of license plate processing and discusses how to:

- Activate license plate processing for a UOM and item dimension group.
- Activate license plate processing for a UOM and item.
- Set up license plate numbering constants.
- Set up segment definitions for license plate numbers.

Understanding License Plate Setup

You can assign license plate numbers at the branch/plant level by item, unit of measure or both. For example, a pallet of item ABC may influence a license plate, but a case of item ABC may not. License plates supports mixed lots of both single and mixed items. The system checks item compatibility if items are mixed on a single license plate. You can set up multilevel parent/child license plate nesting structures, such as a license plate within a license plate after the items are on hand in the branch/plant. You can add items to a license plate manually at any time, including after purchase order receipts and manufacturing completions processes. You use the following EnterpriseOne applications to set up license plate processing:

Item Unit of Measure Definition (P46011)

You can activate license plate functionality for creating license plate numbers (LPN) automatically for a UOM and item dimension group relationship (or definition), or for a UOM and item relationship (or definition).

Note. Automatic License Plate creation can only occur if you are not using manual numbering and the item is not a Dual UOM item. It only occurs in certain applications (Adjustments, To Side of Transfers, PO Receipts (Inbound ASN and Receipt Routing included), and WO Completions) and can be turned off for each of these applications, even if the item UOM definition has it turned on.

License Plate Numbering Constants (P46L001)

You activate license plate functionality and setup constants for processing, such as default container code and the generation method for numbering.

Note. Storage unit numbers are no longer known as license plate numbers in this version of the Warehouse Management System and can no longer be created.

License Plate Segment Definition (P46L010)

You can set up segment definitions for license plate numbers. Segment details include the sequence and the length, which combined, make up the license plate number. You also specify which segment types appear and in which order. Segment types include hard coded values, look up types such as container codes, next numbers, or check digits.

You can set up complicated formulas or simple formulas. Formulas are made up of segments. An example of a simple segment would be using Next Numbers. Or, you can set up any combination of hard coded, Next Number, look-up types, container-based UDC, and check digit segments, up to a length of 40. An example might be to set up a hard-code value to identify the branch/plant followed by a next number range.

Container and Carton Codes (P46091)

You can set up default License Plate container type processing groups and associate the default License Plate unit of measure to a container type, such as a case or box, dimensions, weight, and maximum weight. All of these groups are important to license plates and their default values.

See Defining Storage Containers

Tables Used for License Plate Processing

The system can use the following tables for license plate processing:

- License Plate Numbering Constants (F46L001)
- License Plate Segments (F46L010)
- License Plate Next Numbers (F46L011)
- LPN Supplier Inbound ASN Levels (F46L060)
For future use.
- LPN Supplier Cross Reference (F46L070)
For future use.
- License Plate Master (F46L10)
- License Plate Item Detail (F46L11)
- License Plate Commitment (F46L12)
- License Plate Cross Reference (F46L20)
- Location Capacity (F46L30)
- License Plate Cycle and Tag Count (F46L42)
- License Plate History (F46L99)

You must set up the following user defined codes for license plate processing:

- 46L/SC (License Plate Status Code)

- 46L/RC (License Plate Reason Code)
- 46L/CR (Cross Reference Type)
- 46L/CT (Commitment Type)
- 46L/LG LP (Generation Method)
- 46L/LT LP (Lookup Type)
- 46L/TT (Transaction type)
- 46L/ST (Segment Type)
- 46L/LS
- 46L/IA

Forms Used to Set Up License Plate Processing

Form Name	Form ID	Navigation	Usage
U/M Definition by Group Revisions	W46011B	License Plate setup (G46L41), U/M Definition by Group. On Work with Item Unit of Measure Definition, select or copy an item group, or click Add.	Activate license plate processing for a UOM and item dimension group.
U/M Definition by Item Revisions	W46011B	License Plate setup (G46L41), U/M Definition by Item. On Work with U/M Definition by Item, click Add, select, change, or copy an item.	Activate license plate processing for a UOM and item. Note. This option turns on the automatic generation of License Plates for the Item (group)/UOM definition. You can setup several UOMs in the structure with automatic LPN generation.
License Plate Branch/Plant Constants	W46L001B	License Plate setup (G46L41), License Plate Branch/Plant Constants On License Plate Branch/Plant Constants, click find.	Set up license plate numbering constants for the Branch/Plants.
License Plate Segment Revisions	W46L010D	License Plate setup (G46L41), License Plate Segment Definition. On Work with License Plate Segment Definitions, click Add.	Set up segment definitions for generation of license plate numbers.

Activating License Plate Processing for a UOM and Item Dimension Group/ UOM and Item

Access the U/M Definition by Item Revisions form.

License Plate Select to specify whether you want the system to automatically create a license plate number automatically for the Item/UOM or Item Dimension Group/UOM in this unit of measure.

Setting Up License Plate Branch/Plant Constants

Access the License Plate Branch/Plant Constants form.

Note. This numbering method is the default value. You can override this number at any time when creating the license plate and during certain transactions, such as PO Receipts, work order completion, PO receipt routing, inventory adjustments, and inventory transfers. Also, data collections can also scan or read the license plate numbers and send them into the system to create the license plates.

LPN Switch Enter a code to specify whether you want the system to use license plate numbers for the Branch/Plant. Values are

0: No, do not use the license plate process

1: Yes, use the license plate process

Note. License Plates can not be turned on for a Branch/Plant unless there are no F4602 records in the table for that B/P. To do this, users should convert/upgrade by running R46L820.

License Plate Numbering Method Enter the code to indicate what license plate number generation method should be used for the B/P. There are three license plate numbering methods you can specify at the License Plate Branch/Plant Constants to be the default numbering method for License Plate creation transactions completed within the Branch/Plant. Values are:

01: Manual entry. The system will not automatically create license plate numbers. Any time that a new license plate is created, the number must be entered manually.

02: Create using a user defined formula. A user defined formula enables you to specify how the system creates license plate numbers when the license plates are created. This method is similar to that of the tracking numbering used in pick, pack, and ship. To use this method at any time, you must set up the formula at the branch/plant level in License Plate Segment Definition (P46L010).

03: Create EPC (electronic product code) number. The system uses the Electronic Product Code processes to create the license plate number when the license plates are created.

LPN Master Settings

Click Add to display the LPN Master Settings tab.

LPN Process On/Off Select to specify whether to use license plate numbers for the Branch/Plant.

LPN Default Container Code	Enter the user defined code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers. For license plates, the specified container code will be the default container code for every license plate containing mixed items. Non-mixed license plate numbers will use the container code set up for the specific Item/UOM in Item Unit of Measure Definition (P46011) and not by creating building automatically or a UOM structure. You can override this default container code for a license plate only if it was created automatically or by UOM structure.
LPN Generation Method	Enter the code to specify what license plate number generation method to use. Values are <i>01</i>: Manual entry <i>02</i>: Create using a user defined formula <i>03</i>: Create EPC (electronic product code) number
License Plate Status Code	Enter a user defined code that will be the default starting (created) License Plate Status Code for the B/P. License Plate Status Codes can be changed at anytime using the License Plate Workbench. The default starting value for the status code can be overridden during certain License Plate creation processes.

Set Up Segment Definitions for License Plate Numbers

Access the License Plate Segment Revisions form.

Segment Sequence	Enter the number that specifies what sequence this segment is to appear in the license plate number. For example, if the sequence is 1, then the segment will appear first when the license plate number is constructed assuming that there is not a sequence of 0 defined.
Segment Length	Enter the number that specifies the length of this segment of the license plate. A single segment must be from 1 to 40 characters long. The total length of all segments for a branch/plant numbering formula cannot exceed 40 characters.
Segment Type	Select to specify the type of license plate segment. The following options exist: • Hard Coded Value • Lookup Type • Container Code Based UDC • Next Number • Check Digit (segment length must be 1 character) • User Defined Function (must be the only segment for the branch/plant numbering formula)
Product Code	Enter the UDC (98/SY) defined for license plate segments. The values should match the segment type selected. The system retrieves a UDC value based on the segment type and uses the UDC description as the value for the segment. If

the segment is defined with a length of 10, then the first ten characters of the UDC description will be used to populate the segment.

User Defined Code

Enter the UDC (98/SY) defined for license plate segments. The values should match the segment type selected. The system retrieves a UDC value based on the segment type and uses the UDC description as the value for the segment. If the segment is defined with a length of 10, then the first ten characters of the UDC description will be used to populate the segment.

License Plate Enhancement

This enhancement converts/upgrades using the License Plate enhancement feature by running R46L820 and R46L830.

Storage Unit Numbers are obsolete in this version.

CHAPTER 4

Working with License Plate Information

This chapter contains an overview of license plates and discusses how to manage license plate information.

Understanding License Plates

Item identification and processing characteristics are the basic information elements that are specific to individual items across a company. License plate numbers are assigned to groups of items, lots and serial numbers. The processing and identification of the group is greatly simplified by simply referring to the license plate number. Industry users also require the ability to receive, store, move, and ship goods using license plate numbers. This eases the administrative burden of processing inventory movements by item or lot.

License plating enables you to perform putaway, pick, or replenishments, or to perform movement suggestions for pallet or other container quantities based on a system-generated or manually generated license plate numbers. The following EnterpriseOne applications process license plate information:

License Plate Workbench (P46L10)

You can set up and maintain license plate records and review all of the information associated with the license plate record. For example, you can locate parent/child records, review characteristics and dimensions, review history via row exit, and review hierarchy information of containers via row exit and items. You can also perform full License Plate inventory transfers and full License Plate inventory issues using the workbench. Use the processing options on the Security tab to specify whether to allow issues and transfers, and the processing options on the Versions tab to specify which versions of the system should use.

Assign/Remove Items to License Plate (P46L30)

You can search across branch/plant, item, location, and lot information, to assign or remove items to/from new or existing license plate records. You can use this application to build license plate records based on the Unit of Measure structure of the item, add or remove items from an existing license plate records, or create new license plate records.

Note. Some dimensions can be overridden when items are added to an existing License plate.

Assign/Remove Child License Plate (P46L31)

You can search across branch/plant and location information and build the record by assigning license plate records to a parent license plate record. You can also use this application to create new parent license plates or to remove a child license plates from a parent License Plate.

Location Capacity Workbench (P46L40)

You can locate location capacity records in order to view or manage the storage locations' volume and weight information.

License Plate Cross Reference (P46L20)

You can cross-reference license plate numbers with a different number and cross-reference type, based on the user defined code CR (License Plate Cross-Reference Type). You can also access the workbench and history information from this program and use it for the searching of EnterpriseOne License Plate numbers by their other cross-referenced numbers.

License Plate History (P46L99).

You can review historical activity for license plate records and various characteristics, such as dimensions, item information and audit information.

Batch License Plate Putaway Request (R46L140).

You create full license plate putaway requests for outermost parent license plates. You base data selection on License Plate Master (F46L10) information.

See “Working with Putaway Requests,” Creating Putaway Requests by Batch

Batch Putaway Request (R46L140).

This should not be part of this section since it deals with processes when you don’t have License Plates to be processed.

You can create item putaway requests for items not on license plates. This UBE can be used with or without the license plate enhancement functionality. Data selection is based on Item Location (F41021) information.

See “Working with Putaway Requests,” Creating Putaway Requests by Batch

F4602 License Plate Conversion (R46L820)

You can convert and remove item Location Detail Information (F4602) records to activate the new License Plate enhancement functionality. This UBE converts existing storage unit numbers (STUNs) into new license plate records. This UBE also removes all item Location Detail Information (F4602) records, which is a prerequisite to activating the license plate functionality for the branch/plant. You base data selection on the F4602 table.

Note. This UBE should be used only once during the conversion and not when using the License Plate feature to begin using the functionality.

Location Capacity Build (R46L830)

You can build Location Capacity (F46L30) records needed for the license plate enhancement. This UBE creates or updates the used and reserved volume and weight of the locations selected. You base data selection on Location Master (F4100) information.

Note. This application should be run when prior to using the new License Plate functionality. It can be run more than once and used before or after the R46L820 conversion.

Inventory Issues (P4112)

You can enter the license plate number from which to remove the inventory.

See PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook, “Using Inventory Transactions,” Issuing Inventory

Inventory Transfers (P4113)

Enter the license plate number from which to transfer inventory. If the To branch/plant value has license plates functionality activated, you use the processing options and license plate branch/plant constants to process license plate information for the To Location value including generating new license plate numbers and manually create license plates for the new TO location.

See PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook, “Using Inventory Transactions,” Transferring Inventory

Inventory Adjustments (P4114)

Use the processing options and license plate branch/plant constants to process license plate information for addition of inventory to the Location including generating new license plate numbers and manually create license plates for the new TO location.

See PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook, “Using Inventory Transactions,” Adjusting Inventory

Cycle Count Entry (P4141) and Tag Count Entry (P41604)

Specify counted quantity on certain existing license plates. You do this through a Row menu exit on Cycle Count Entry (P4141) to LPN Detail Entry (P46L42) or a Form menu exit from Tag Status Review (P41604) to LPN Detail Entry (P46L42).

See PeopleSoft EnterpriseOne Inventory Management 8.11 PeopleBook, “Managing Physical Inventories,” Entering Counted Quantity on an Existing License Plate

Request Inquiry (P4600)

Filter requests by FROM license plate numbers on the Putaway Requests Inquiry (W4600A) and Manual Putaway Location Planner (W4600B) forms. The FROM License Plate Number is not a filter on the Manual Putaway Location Planner form. For full License Plate Putaway requests, the FROM License Plate Number is displayed in the header values and impacts the processes/options that the screen can be used for. You can also inquire by LPN on Replenishments as well and Replenishment Full License Plate Requests have some of the same impacts to the Manual Replenishment Location Planner screens.

See [Chapter 7, “Working with Putaway Requests,” Locating Existing Putaway Requests, page 169.](#)

Warehouse Movement Confirmations (P4617)

Process movement confirmation/cancel/override for license plate numbers. License Plate numbers are filters (both FROM and TO) for this form as well.

See Confirming Putaway Suggestions

Manual Replenishments (P46100)

Create putaway and replenishment requests for items and license plates.

See “Working with Replenishment”

PO Receipts (P4312)

Use the processing options Warehousing and license plate branch/plant constants to process license plate information for adding inventory to the location including generating new license plate numbers or manually creating license plates form a new location.

See PeopleSoft EnterpriseOne Procurement 8.11 PeopleBook, “Using Receipt Processing,” Setting Processing Options for PO Receipts (P4312)

Receipt Routing Movements and Disposition (P43250)

Use the Receipts by Purchase Order processing option on the Versions tab, and the license plate branch/plant constants, to process license plate information for adding inventory to the location including generating new license plate numbers or manually creating license plates form a new location.

See PeopleSoft EnterpriseOne Procurement 8.11 PeopleBook, “Routing Receipts,” Setting Processing Options for Receipt Routing Movement and Disposition (P43250)

Work Order Completions (P31114).

Use the processing options on the Warehouse Management tab and license plate branch/plant constants to process license plate information for addition of inventory to the location including generating new license plate numbers or manually creating license plates form a new location.

See PeopleSoft EnterpriseOne Shop Floor Management 8.11 PeopleBook, “Working with Completions,” Setting Processing Options for Work Order Completions (P31114)

EDI Receiving Advice Edit/Create – Purchasing (R47071)

Use the Receipts by PO (P4312) processing option on the Version tab, and license plate branch/plant constants, to process license plate information for adding inventory to the location including generating new license plate numbers or manually creating license plates form a new location.

See PeopleSoft EnterpriseOne Data Interface for Electronic Data Interchange 8.11 PeopleBook,” Receiving Advice into Purchasing,” Setting Processing Options for EDI Receiving Advice Edit/Create (R47071)

Prerequisite

Ensure that you have set up license plate processing.

See Setting Up License Plate Processing

Managing License Plate Information

This section discusses how to manage or create/modify license plate information

- Assign items to a license plate record.
- Assign license plates to parent license plate records.
- Add license plate cross-references.
- Set processing options for the License Plate Workbench (P46L10)
- Manage license plate inventory (workbench).
- Revise location, volume, and weight information.
- Review license plate history.
- Set processing options for F4602 License Plate Conversion (R46L820)

Forms Used to Manage License Plate Information

Form Name	Form ID	Navigation	Usage
Assign/Remove Items To/From License Plates	W46L30B	License Plate Daily Processing (G46L10), Assign/Remove Items to License Plate On Assign/Remove Items to/from License Plates, complete the search filter fields and click Find. On Assign/Remove Items to License Plates, choose a row and click Build.	Assign items to a new or existing license plates. Remove items from an existing license plate. Build license plate numbers based on the Item Unit of Measure Structure definitions.
Assign/Remove Child LPN To/From License Plates	W46L31B	License Plate Daily Processing (G46L10), Assign/Remove Child License Plate On Assign/Remove Child License Plate - Search License Plate Information, click Find.	Assign or remove license plates to/from parent license plates.
License Plate Cross-Reference	W46L20C	License Plate Daily Processing (G46L10), License Plate Cross Reference On License Plate Cross-Reference, click find.	Add license plate cross references. Inquire on license plate cross referenced numbers.
License Plate Workbench – View License Plate Information	W46L10C	License Plate Daily Processing (G46L10), License Plate Workbench On License Plate Workbench – View License Plate Information, click find.	Manage license plate inventory. Perform license plate transfers and issues. Review or edit license plate master information.
License Plate Workbench – View License Plate Hierarchy	W46L10B	License Plate Workbench (P46L10), View License Plate Information On License Plate Workbench — View License Plate Information, select a record and choose License Plate Hierarchy from the Row menu.	Review hierarchical license plate structures of containers and items.
License Plate History — View History	W46L99A	License Plate Daily Processing (G46L10), License Plate History On License Plate History — View History, click find	Review license plate transaction history.

Page Name	Object Name	Navigation	Usage
Location Capacity Workbench - Edit Location Capacity	W46L40B	License Plate Daily Processing (G46L10), Location Capacity Workbench. On Location Capacity Workbench — Inquiry, select a record.	Revising used or reserved volume and weight information.
Work with Batch Versions — Available Versions	W98305WA	License Plate Advanced & Technical Ops (G46L31), F4602 License Plate Conversion On Work with Batch Versions — Available Versions, click find.	Convert and remove item location detail information.
Work with Batch Versions — Available Versions	W98305WA	License Plate Advanced & Technical Ops (G46L31), Location Capacity Build On Work with Batch Versions — Available Versions, click find.	Build location capacity records.

Assigning Items to a Licence Plate Record

There are several ways to assign items to a license plate record. If you just want to assign an item to an existing license plates, then after you have searched and found the item from the first screen to the second (main) screen, then you select “existing LPN” radio button and type in (or use the search and select to find an existing LPN) the existing License Plate number and click the “build” button. Once you have done that you can select the item that you want to put onto the existing license plate. You type in the quantity of the item you want to move onto the license plate and click the “add” button. The quantity is then added to the license plate on the screen and you select “save changes” to save the new item onto the license plate. Prior to “save changes”, the user can change the properties of the License Plate, such as the dimensions, container code, or weight.

If you want to create a new License Plate but type in the new license plate number then you select “new LPN” radio button and type in the new license plate number and click the “build” button. Once you have done that you can select the item that you want to put onto the new license plate. You type in the quantity of the item you want to move onto the license plate and click the “add” button. The quantity is then added to the license plate on the screen and you select “save changes” to save the new item onto the new license plate. Prior to “save changes”, the user can change the default properties of the License Plate, such as the dimensions, container code, or enter a user overridden weight.

If you want to create a new License Plate but let the license plate number be system generated then you select “new LPN” radio button and leave the license plate number blank and click the “build” button. Once you have done that you can select the item that you want to put onto the new license plate. You type in the quantity of the item you want to move onto the license plate and click the “add” button. The quantity is then added to the license plate on the screen and you select “save changes” to save the new item onto the new license plate. Prior to “save changes”, the user can change the default properties of the License Plate, such as the dimensions, container code, or enter a user overridden weight.

You can also create new empty license plate numbers (either system generated number or by typing in the number) by not putting any items onto the license plate after hitting the “build” button.

If you want to create a new License Plate based on the item's UOM structure and let the license plate number be system generated then you select "new LPN" radio button and leave the license plate number blank and click the "build" button. Once you have done that you can select the item that you want to put onto the new license plates that will be generated based on the item's UOM structure. You type in the quantity of the item you want to move onto the license plate and click the "build by structure" button. This takes you to another screen. You need to have another section that explains the use of this screen.

On the build by structure screen, the user can modify the UOM structure that they want to use to create the License Plates for. The screen displays (in the grid) the default UOM structure for the Item and brings in the create LPN flag from the F46011 table for each of the UOM records in the grid. The screen displays the total number of License Plates that would be generated with the current selections. The user can add new Units of Measures (grid lines) to the structure with a container code. The user can turn on or turn off whether a UOM in the structure creates License Plates. The user can change the conversions between the UOMs to create more or less license plates for the item (this would better represent the actual structure of the item in the location)

Once the user has the correct structure represented, they can generate the License Plates. Depending on the License Plate Branch/Plant constants, the user can select to automatically generate and save the new License Plates. Or the user can select to show the License Plates that will be generated in another grid on the screen. With this the user can change the License Plate Number or enter the Dual UOM information. All License Plates generated from this screen will use the Item UOM definitions (F46011) to populate License Plate master information. You must have a valid Item UOM definition for each of the UOMs used to generate License Plates

Access the Assign/Remove Items To License Plate form.

To assign items to a license plate record

1. Locate the license plate record.
2. Select the item, enter the quantity, and click Add.
3. Select a record in the detail area and click Build Structure.

The system moves the quantity of that item to the new or existing license plate record.

Click Remove to remove an item and a quantity from a license plate. If you use an existing license plate and select build, you have the option to add to that plate or remove it. To remove, select the item in the lower grid, enter a quantity, and then click Remove.

Create New LP	Select to create a new license plate number.
Use Existing LP	Select to use an existing plate number. You can use the visual assist to access the workbench and locate an existing license plate number.
License Plate Number	If you use an existing number, enter the license plate number or select a number from the Licence Plate Workbench — View License Plate Information form. If you choose to create a new license plate number, then you can type in the new license plate number you wish to use or leave blank if you want the system to generate the new license plate number(s). The license plate number is a unique value that identifies a collection of items and/or other license plates. The license plate number is typically used to simplify movements and inventory transactions.

LPN Item

Select the LPN Item tab to review item information for existing License Plates or the item changes made to the license plates.

LP Information

Select the LP Information tab to revise information fields as necessary.

Parent License Plate Number	A parent license plate number is a unique value that identifies a collection of license plates. The license plate number is typically used to simplify movements and inventory transactions.
Container Code	Enter the code (46/EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.
License Plate Status Code	Enter the user defined code that enables the user to set a License Plate Status Code to the License Plate Number Examples of possible UDC Status Codes are: 01: Open 02: Close
License Plate Reason Code	Enter the user defined code to document the reason behind change in the License Plate Status Examples of possible UDC Reason codes are: 01: Damaged 02: Scraped Parts 03: Error
Cross Referenced LPN Type	Enter the user defined code that further qualifies the cross-referenced license number.
Cross Referenced LPN	Enter the number you wish to cross referenceto the license plate number. This value enables you to identify your internal license plate with a different number.

Assigning Child License Plates to Parent Records

Access the Assign/Remove Child Licence Plate To License Plate form.

To assign a child license plate:

1. Locate the parent license plate number.
2. Select license plate records in the detail area and click Add to add them to the parent.

Create New License Plate	Select to create a new license plate number.
Use Existing License Plate	Select to use an existing plate number. Select to use an existing plate number. You can use the visual assist to access the workbench and locate an existing license plate number.
Parent License Plate Number	If you are using existing License Plates, enter the parent licence plate number and click Build. If you choose to create a new license plate number, then you can type in the new parent license plate number you wish to use or leave blank

if you want the system to generate the new parent license plate number(s). This number is a unique value that identifies a collection of license plates. The license plate number is typically used to simplify movements and inventory transactions.

Child License Plate

Select the Child License Plate Number tab to review the child license plate record for existing Parent License Plates or the License Plate changes made to the parent license plate.

Parent License Plate Information

Select the Parent License Plate Information tab to revise parent License Plate information.

Adding License Plate Cross References

Access the License Plate Cross-Reference form.

To add cross references:

1. Complete the header fields to locate license plate records:
2. Select a record in the detail area and click Add.
3. Complete the fields under the Add-Cross Reference group.

Internal License Plate Number

Enter the internal license plate number. This number is a unique value that identifies a collection of items and/or other license plates. The license plate number is typically used to simplify movements and inventory transactions.

Cross Referenced LPN Type

A user defined code that further qualifies the cross-referenced license number. For example, the user may want to cross reference the vendor's license plate number to the EnterpriseOne License Plate number, to do so they would create a Cross Referenced License Plate Number type for Vendor's License Plate and use that type when entering the vendor's license plate number as a reference to the internal (EnterpriseOne) license plate number.

Cross-Referenced Number

A cross-referenced license plate allows you to identify your internal license plate with a different number

Setting Processing Options for the License Plate Workbench (P46L10)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Security

Use these processing options to specify the level of security for status and reason codes, inventory transfers, and issues.

1. Status and Reason Codes Security	Use this processing option to specify whether to allow changes to status and reason codes. Values are: <i>Blank:</i> No authority to make changes. <i>I:</i> Authorize changes.
2. Inventory Issue	Use this processing option to specify whether full license plate inventory issues are allowed by the user. Values are: <i>Blank:</i> Full license plate Issues not allowed. <i>I:</i> Full license plate Issues are allowed.
3. Inventory Transfer	Use this processing option to specify whether a full license plate inventory transfers are allowed for the user. Values are: <i>Blank:</i> Full license plate transfers not allowed <i>I:</i> Full license plate transfers are allowed

Versions

Use these processing options to specify the versions for inventory transfers and issues.

1. Inventory Issue (P4112)	Use this processing option to determine which version of the Inventory Issue Processing program (P4112) the system uses.
2. Inventory Transfer (P4113)	Use this processing option to determine which version of the Inventory Transfer Processing program (P4113) the system uses.

Managing License Plate Information

Access the License Plate Workbench – View License Plate Information form.

Use this form to maintain license plate master records and review all of the information associated with the license plate record.

Revising Location, Volume, and Weight Information

Access the Location Capacity Workbench - Edit Location Capacity form.

Used Volume	Enter the current used volume of the location. The unit of measure is defined in Branch/Plant Constants (P41001).
Used Weight	Enter the current used weight of the location. The unit of measure is defined in Branch/Plant Constants (P41001).
Reserve Volume	Enter the current reserved volume of the location. Reserved volume is defined as the volume of the inventory/license plates that are committed to come into the location either through a movement suggestion

or a warehouse reservation. The unit of measure is defined in Branch/Plant Constants (P41001).

This field is enabled to be changed but none of the fields on this screen are required to be changed. See comment at beginning of section.

Reserve Weight

Enter the current reserved weight of the location.

Reserved weight is defined as the weight of the inventory/license plates that are committed to come into the location either through a movement suggestion or a warehouse reservation. The unit of measure is defined in Branch/Plant Constants (P41001).

This field is enabled to be changed but none of the fields on this screen are required to be changed. See comment at beginning of section.

Max Volume

This field is enabled to be changed but none of the fields on this screen are required to be changed. See comment at beginning of section.

Maximum Weight

This field is enabled to be changed but none of the fields on this screen are required to be changed. See comment at beginning of section.

Volume U/M

This field is disabled. The unit of measure is defined in Branch/Plant Constants (P41001).

Weight U/M

This field is disabled. The unit of measure is defined in Branch/Plant Constants (P41001).

Reviewing License Plate History

Access the License Plate History — View History form.

Setting Processing Options for F4602 License Plate Conversion (R46L820)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Branch/Plant

Use these processing options to specify branch/plant, license plate status codes, and container codes for processing.

1. Branch/Plant to Be Converted

Use this processing option to specify the branch/plant the system uses for conversion.

This field forces data selection to the single Branch/Plant that is entered here.

2. License Plate Status Code

Use this processing option to set a License Plate Status Code to the new License Plate Number. This is only used if the process converts any STUNs into new License Plate records.

3. License Plate Container Code

Use this processing option to specify the new license plate container code. This is only used if the process converts any STUNs into new License Plate records. This code (46/EQ) identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use the Container and Carton Codes program (P46091) to define storage containers.

CHAPTER 5

Working with RFID Processing

This chapter provides overviews of the Global Trade Identification Number (GTIN), Electronic Product Codes (EPC) and how the system processes EPC numbers for outbound and inbound processes. This chapter also discusses how to set up RFID processing information.

Understanding the GTIN

The GTIN enables you to identify items in the standard EAN.UCC System. The GTIN is a product number that uniquely identifies the item, level of packaging, and manufacturer. Level of packaging refers to a standard quantity of units of the item and is represented by unit of measure.

The system uses the RFID UDC value for Number Type (46R/NT) for setting up the GTIN. This value is hard-coded. However, you can setup different unique product numbering types as needed for their needs in this UDC such as National Drug Code (NDC).

Understanding Electronic Product Codes

The EPC is a unique product code comprising varying numbers of different segments, each with varying lengths. The following table describes some common segments. This example is related to the version of the EPC Tag Data Standards called General Identifier (GID-96). Ensure that you are complying to the standards for EPC global:

Header	The Header segment provides the version number of the standard and identifies the length, type, and structure of the EPC. You must set up the header segment before setting up the segment definitions, manager, and serial number. Segment lengths combined, including header length, must match the overall length in the header definition.
Manager	The Manager segment, also called the Domain, represents the manufacturer or brand owner manager number.
Class	The Class segment represents the manufacturer's stock keeping units (SKU), to identify the item.
Instance	The Instance is the serial number of an item within an object class of the EPC.

The length of each segment is defined by how many bits are required to fill that segment. The following example describes the bit lengths per segment of an EPC:

Segment	Header	Manager	Class	Instance
96-bit	8	28	24	36

The following example is a typical EPC:

Header	Manager	Class	Instance
01	0000A89	00016F	000169DC0

The system represents and stores the header value, manager code, and EPC serial number in decimal format. Lengths are represented in bits. The system converts the decimal values (base 10) to bits (base 2) and generates and stores the EPC number in hexadecimal (base 16) format.

You set up the EPC based on the values for customer ship to/sold to and carton type. The system stores the EPC number as the Carton Serial Number field in the Carton Detail Information - (F4620).

You can use the Label Serial Numbers (Preference Type 38) preference in combination with the Carton Label (Preference Type 39) preference and the Carton Reorganization (P4620) processing options to specify how the system processes EPCs. If you do not specify a preference type and indicate to use the preference, the system uses the value established in the Serial Number Creation processing option on the Serial Number tab in the processing option for Carton Reorganization (P4620).

Understanding EPC Numbers for Outbound Shipments

You can generate an outbound EPC from the following applications:

Carton Reorganization (P4620)

You can generate EPC numbers when creating carton detail from cartons and item quantity on Carton Reorganization (P4620). The system creates EPC numbers at the carton level. For example, the EPC may be created for cases of a certain type for the specified customer on the shipment.

After you create or reorganize cartons in a shipment, you also might want to review carton detail information. The Carton Detail Inquiry program (P4621) enables you to review the following types of carton detail information:

- Carton identification information
- Item information
- Electronic product codes
- Weight and dimension information
- Related sales order information
- UCC 128 information

See PeopleSoft Warehouse Management Guide, "Creating Carton Detail."

Standard Pack Carton Recommendations (P4615)

You can automatically assign EPC numbers for outbound shipping cartons when creating carton detail from carton recommendations.

See PeopleSoft Warehouse Management Guide, "Working with Standard Pack Carton Recommendations."

Inbound Labels

The third party can send data generated from label processing back to the PeopleSoft EnterpriseOne system. This data can include the EPC, but if it does not include EPC (or carton serial number) information, you can generate that information as a step in this process. The system stores the label data in the Carton Detail Information table (F4620). This table must be updated with accurate information from the physical shipment because the system uses this information to create packaging information on the ASN and the Bill of Lading.

You generate outbound label data from system tables to a third party for formatting and printing. The outbound label information includes the Ship To address, EDI data, and demand scheduling data, such as the supplier or plant code (Party Type 1 and 2), and can include the EPC.

See PeopleSoft Warehouse Management Guide, "Working with Label Information."

Create Task and Trip (R46471)

You can generate EPC numbers when you create task and trips for your suggestions. The system can create the EPC number at the carton level when you create carton detail.

See PeopleSoft Warehouse Management Guide, "Creating Tasks and Trips."

Warehouse Movement Confirmations (P4617)

You can generate EPC numbers during pick confirmation over confirmed item quantity on pick suggestions. The system can create the EPC number at the carton level when you create or update carton detail.

See PeopleSoft Warehouse Management Guide, "Confirming Putaway Suggestions."

ASN Packaging Revisions (P470371)

You can generate EPC numbers when running this program.

Understanding EPC Inbound Processing

The system processes RFID information during the inbound ASN (Advance Ship Notice) process. The system can carry the EPC number inbound through to the receipt file and shows on some of the Receipt Routing screens. Carton Serial Number field (EPC) exists in the following tables:

- EDI Shipping Notice Detail – Inbound (F47032)
- EDI Receiving Advice Detail – Inbound (F47072)
- Purchase Order Receiver (F43121)

The following programs also process the EPC:

- Status Inquiry Revisions (P47030). You can edit this field on the Inbound EDI Shipping Detail Revisions (W47030A) form.
- Receipt Routing Movements and Disposition (P43250). On the Receipt Routing Movement (W43250L) form, the EPC exists as a filter field in the header and detail area.

Note. If you specify in the Show Shipment and Pack Information processing option on the Display tab to not display pack information (value of 1), the system does not display the EPC field on the Receipt Routing Movement form.

- Routing Ledger Inquiry (P43252). On the Work With Receipt Routing Ledger (W43252D) form the EPC Number field exists as a header filter field and for QBE functionality.
- EDI Shipping Notice Edit/Create (R47031). The system displays the EPC information on this report.
- Inbound Receiving Advice Edit/Update (R47071). The system creates license plate data from inbound advance ship notices (ASN) for on-hand quantities received.

Note. You can process only one entire inbound ASN batch of records at a time.

- License Plate Management (46L). You can generate EPC numbers for items when processing license plate information.
-

Prerequisites

For RFID outbound processes:

- Set up the RFID Outbound UDC for the EPC Header (46R/HD).
- If you are not using the Label Serial Numbers (Preference Type 38), set up the method for generating EPC numbers. To do so, complete the processing option Serial Number Creation Process Value on the Serial Number tab in the Carton Reorganization (P4620) application.

Note. Even if you are using the preference, you must set up the processing options for P4620 to specify that you are using the preference.

- Create a transportation shipment.

Setting Up RFID Processing Information

This section discusses how to:

- Set up unique product numbers.
- Set up EPC header values and segments.
- Generate EPC numbers when creating carton detail.

Forms Used to Process RFID Information

Form Name	Form ID	Navigation	Usage
Unique Product Number Setup	W41013A	GTIN and EPC Setup (G464112), Unique Product Table.	Enter unique product number details and click Save. You can also add, copy, or delete product number details.
EPC Setup	W46R010C	GTIN and EPC Setup (G464112), Electronic Product Code Segment When creating a new header value, select the empty row in the grid to enable the fields in the Details group.	Set up EPC segment information, including header values, segment definition, managers, and serial numbers. Click Save to store the record.
Work with Shipment Cartons	W4620A	Shipping and Packaging Management (G4615), Carton Reorganization	Locate shipment records to reorganize or create carton detail.
Carton Reorganization	W4620C	On Work with Shipment Cartons, locate the record and click Select.	Reorganize carton recommendations and update carton detail.
Carton Detail Add/Update	W4620B	On Carton Reorganization, select a shipment and click Add. Or, click the carton in the carton tree.	Specify whether to automatically generate an EPC along with outbound shipping carton detail. The system enables you to use an EPC number in addition to a UCC-128 or label next number.

Setting Up Unique Product Numbers

Access the Unique Product Number Setup form.

Number Type

Enter the number type, in this case, GTIN. You can enter other types of numbers in this field, such as the National Drug Code (NDC) or EAN-8. You select the number type value from UDC 46R/NT.

Enter EPCOC to set up the object class code to be used in the manual EPC configuration.

Item Number

Enter the item number.

Unit of Measure

Enter the unit of measure. You select the unit of measure value from UDC 00/UM. If you do not enter a value, the item's primary unit of measure is the default value. If the item has a dual unit of measure, and the Picking processing option is set, then the system uses the item's secondary unit of measure as the default value.

Address Number

(Optional) Enter the customer's address book number.

Unique Product Number

Enter the unique product number. This is up to a 30-digit alphanumeric value. The system validates the uniqueness of the product number. If you specify

that the number type is GTIN, this value must adhere to the GTIN valid format, and the system validates that the number is 14 decimal digits long and the check digit is correct. If you specify that the number type is EPCOC, the system validates this value in decimal format.

Setting Up EPC Header Values and Segments

Access the EPC Setup form.

EPC Setup

Cancel Tools

Header Segment Definition Manager Serial Number

EPC Header

Primary Filter

Header Version *

Header Value *

Find

No records fetched. Customize Grid

	Header Version	EPC Header Description	EPC Length	Header Length	Header Value

Details

Header Version

EPC Length (Bits)

Header Length (Bits)

Header Value

Save Delete

EPC Setup form

EPC Header

Select the Header tab.

Header Version

Specify the EPC version. Use this code to associate the EPC header attributes, such as total EPC length and header value, with an EPC segment definition. This code is based on UDC 46R/HD.

EPC Length (Bits)

Enter the total binary (base 2) length of the EPC.

Header Length (Bits)

Enter the header binary length of the EPC header segment.

Header Value

Enter the value of the EPC header. You enter this value in decimal format. The system converts the value into bits when generating EPC numbers. When converted to bits, the length of the value cannot exceed the header length.

EPC Segment Definition

Select the Segment Definition tab.

EPC Setup [i] [?] [?]

Cancel [X] Tools [Icon]

Header Segment Definition Manager Serial Number

EPC Segment Definition

Primary Filter

Effective Date * [Text Box]
 Configuration * [Text Box]
 Manager Level * [Text Box]

Find Current Reset

No records fetched. [Customize Grid](#) [Icon] [Icon] [Icon]

Effective Date	Header Version	Configuration	Manager Level	Manager Length	Object Class Length	Serial Number Length	Header Length
[Empty Table Body]							

Definition Details

Date Created	[Text Box]	EPC Length (Bits)	[Text Box]
Effective Date	[Text Box]	Current Total Length (Bits)	[Text Box]
Header Version	[Text Box]	Manager Code Length (Bits)	[Text Box]
Configuration	[Text Box]	Object Class Length (Bits)	[Text Box]
Manager Level	[Text Box]	Serial Number Length (Bits)	[Text Box]

Save Delete

EPC Segment Definition form

Date Created	The system populates this field with the current date.
Effective Date	Enter the date on which this record becomes available for use in EPC number generating transactions.
Header Version	Enter the code to specify an EPC version. You use this version to associate EPC header attributes, such as total EPC length and header value with an EPC segment definition. This code is based on the EPC Header UDC 46R/HD.
Configuration	Specify the configuration for the EPC construction. The EPC is a combined value of the header, manager, object class, and instance.
Manager Level	Specify the level at which the EPC manager value is associated with internal entities. The manager identifies the manufacturer or brand owner, and is assigned by EPC Global. You can specify to have the manager associated with the company, branch/plant, or customer of the transaction that is generating the EPC number.
EPC Length (Bits)	The system populates the EPC length, in binary (base 2), from the total EPC length header definition.
Current Total Length (Bits)	The system populates the entire length of the EPC, in binary based on the current segment definition lengths. The system validates the total length against the header definition.
Manager Code Length (Bits)	Manual configuration enables you to populate the length of the ECP manager segment, in bits. The length value can be between 8 and 64.
Object Class Length (Bits)	The Manual configuration enables you to populate the length of the EPC Object Class code, in bits. The length value can be between 8 and 64.
Serial Number Length (Bits)	Enter the EPC serial number length. The length value can be between 8 and 64.
Current	Click the Current button to display the currently effective segment definition.
EPC Manager	
Select the Manager tab.	

EPC Setup

Cancel Tools

Header Segment Definition **Manager** Serial Number

EPC Manager

Primary Filter

Effective Date *

Header *

Reference Number *

Secondary Filter

Reference Type *

Manager Code *

Find Reset

No records fetched. Customize Grid

	Header Version	Reference Number	Reference Type	Effective Date	Manager Code

Details

Date Created

Effective Date

Header Version

Reference Type

Reference Number

Manager Code

Save Delete

EPC Manager form

Date Created

The system populates this field with the current date.

Effective Date

Enter the date on which this record becomes available for use in transactions that generate EPC numbers.

Header Version

Enter the code to specify an EPC version. You use this version to associate EPC header attributes, such as EPC length and header value, with an EPC segment definition. This will associate the Manager Code with a specific EPC segment definition. This code is based on the EPC Header UDC 46R/HD.

Reference Type

Specify the level at which the EPC managers are associated with internal entities, such as company, branch/plant, or customer. This code is based on the EPC Manager Level UDC 46R/ML.

Reference Number

Enter a reference number associated with an EPC manager reference type. For example, if you use a reference type of Company, enter the Company value that is associated with the Manager Code. Then, during transactions that generate EPC numbers, the system uses the Company value to determine the Manager Code for the EPC number.

Manager Code

Enter the manager code in decimal format. This number is assigned to the manufacturer or brand owner by EPC global.

EPC Serial Number

Select the Serial Number tab.

EPC Setup [i] [?] [?]

Cancel [X] Tools [Icon]

Header Segment Definition Manager **Serial Number**

EPC Serial Number

Primary Filter

Header Version *

Manager Code *

Item Number

Find

No records fetched. Customize Grid [Icon] [Icon] [Icon]

[Icon]	Header Version	Manager Code	Item Number	Serial Number	Increment	Short Item No

Details

Header Version

Manager Code

Item Number

Serial Number

Increment

Save Delete

EPC Serial Number form

Header Version

Enter the code to specify an EPC version. You use this version to associate EPC header attributes, such as EPC length and header value, with an EPC

segment definition. This code associates the EPC serial number with a specific EPC segment definition. This code is based on the EPC Header UDC 46R/HD.

Manager Code

(Optional) Enter the EPC manager code in decimal format. Use this code when you want to associate a range of EPC serial numbers with a specific manager code.

Item Number

(Optional) Enter the number that the system assigns to an item. The format can be a short, long, or third item number. Use this number when you want to assign a specific range of EPC serial numbers by item.

Serial Number

Enter the starting value of the EPC serial number in decimal format.

Increment

Enter the increment factor for the EPC serial number. Each time this EPC serial number is used, the system increments it by this value to maintain uniqueness.

Generating EPC Numbers When Creating Carton Detail

Access the Carton Detail Add/Update form.

Carton Reorganization - Carton Detail Add/Update

OK Cancel Tools

Carton Code 🔍

Number of Cartons

Serial Number

☒ Type in a Serial Number
☐ Generate Tare SSCC
☐ Generate Pack SSCC
☐ Generate Label Next Number

Carton Detail Add/Update form

Type in an EPC

Select this option if you want to manually enter an EPC value to apply to this carton.

Generate EPC

Click Generate EPC to automatically generate the EPC and apply it to this carton.

CHAPTER 6

Working with Movement Processing

This chapter provides an overview of movement processing and discusses how to:

- Define process selection.
- Define movement instructions.

Understanding Movement Processing

Movement processing controls how the system moves items to locations in the warehouse during putaway, picking, and replenishment. You automate inventory movement through your warehouse by defining process selection rules that match items to movement instructions. Movement instructions control which locations that the system suggests for putaway, picking, and replenishment.

You define process selection rules to determine which movement instruction table to use during putaway, picking, and replenishment. You also define process selection rules to determine whether the system maximizes space or employee productivity.

You define movement instructions to create settings that the system uses to refine the list of potential locations to the smallest possible number. These parameters can include whether to select fixed or random locations, and whether to limit the search to a specific zone.

Defining Process Selection

This section provides an overview of process selection, lists a prerequisite, and discusses how to:

- Define process selection rules.
- Set processing options for Process Selection (P46093).

Understanding Process Selection

Process selection matches the warehouse process groups that are defined for the item in the item/branch category codes screen and an order group to a specific process selection rule. The process selection rule points to a particular movement instruction table. The selection of a table is based on the item's warehouse process group, the order group that you have specified, and the source of the request, such as a purchase order receipt, a sales order, or a replenishment. You define process selection by assigning process groups and order groups to specific movement instruction tables.

Process selection takes place after you create a movement request but before you create movement suggestions.

When you define process selection rules, you also specify the process mode, which describes whether you want the system to:

- Maximize space by filling locations to their maximum capacity and emptying partially filled locations as quickly as possible.
- Maximize productivity by minimizing the number of trips that your employees make through the warehouse.
- Use other criteria that you define.

You specify the process mode for each movement instruction table that you include in your process selection table.

Prerequisite

Set up order groups.

Form Used to Define Process Selection

Form Name	Form ID	Navigation	Usage
Process Selection Revisions	W46093C	Warehousing Movement Rules (G46311), Putaway Selection, Picking Selection, or Replenishment Selection Click the Add button on the Work With Process Selection form.	Define process selection rules.

Defining Process Selection Rules

Access the Process Selection Revisions form.

Putaway Selection - Process Selection Revisions

Work With Process Selection | **Process Selection Revisions**

OK Cancel Form Previous Next Tools

Branch/Plant 27

Warehouse Process Group 1	CONSUM	Consumer Goods
Warehouse Process Group 2		Blank
Warehouse Process Group 3		Blank
Order Group		Regular Orders

Putaway Table	PUT	Putaway Instruction Table
Picking Table	PICK	Picking Instruction Table
Replenishment Table	REPL	Replenishment Instruction Table
Putaway Process Mode	S	Space Optimization
Picking Process Mode	S	Space Optimization
Replenishment Process Mode	S	Space Optimization

Putaway Program	
Picking Program	
Replenishment Program	

Process Selection Revisions form

- Warehouse Process Group 1** A user-defined code (41/02) that identifies a group of items for movement purposes. A process group determines what movement instructions the system uses for putaway, picking, and replenishment.
- Warehouse Process Group 2** A user-defined code (41/02) that identifies a group of items for movement purposes. A process group determines what movement instructions the system uses for putaway, picking, and replenishment.
- Warehouse Process Group 3** A user-defined code (41/02) that identifies a group of items for movement purposes. A process group determines what movement instructions the system uses for putaway, picking, and replenishment.
- Order Group** A code (system 46/type DT) that identifies a group of order types that you want to process as one for putaway, picking, and replenishment transactions.
- You set up order group codes on User Defined Codes, then add order types to the code on Order Groups (P46092). You specify an order group on Picking Instructions (P46095) to limit the order types that trigger replenishment after picking.

Putaway Table	A code (system 46/type IT) that identifies a putaway table. The putaway table defines how the system selects locations for putaway. You create putaway tables using Putaway Instructions (P46095).
Picking Table	A code (system 46/type IT) that identifies a picking table. The picking table defines how the system selects locations for picking. You create picking tables using Picking Instructions (P46095).
Replenishment Table	A code (system 46/type IT) that identifies a replenishment table. The replenishment table defines how the system selects locations for replenishment. You create replenishment tables using Replenishment Instructions (P46095).
Putaway Process Mode	A user-defined code (46/PC) that determines the putaway processing method. Values are: <i>P</i>: Productivity mode. The system suggests the fewest locations possible to minimize the number of putaway and picking trips. <i>S</i>: Space maximization mode. The system maximizes the use of space by trying to top off partially filled locations. This mode also minimizes inventory fragmentation.
Picking Process Mode	A code (system 46/type PC) that identifies a picking processing method. Valid codes are: <i>P</i>: Productivity mode. The system suggests the fewest locations possible to minimize the number of putaway and picking trips. The system minimizes the number of replenishment trips by replenishing from the fewest locations possible. <i>S</i>: Space maximization mode. The system maximizes space use by trying to top off partially filled locations to minimize inventory fragmentation.
Replenishment Process Mode	A code (system 46/type PC) that identifies a replenishment processing method. Valid codes are: <i>P</i>: Productivity mode. The system suggests the fewest locations possible to minimize the number of putaway and picking trips. The system minimizes the number of replenishment trips by replenishing from the fewest locations possible. <i>S</i>: Space maximization mode. The system maximizes space use by attempting to top off partially filled locations to minimize inventory fragmentation.

See Also

Setting Up Item Warehouse Information in the Warehouse Management Guide for information about setting up warehouse process groups

Setting Up Order Groups in the Warehouse Management Guide for information about setting up order groups

Setting Processing Options for Process Selection (P46093)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, the availability of fields on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by the prefix ZJDE or XJDE. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Movement Option

Select the Movement Option tab.

1. Enter a '1' for Putaway, a '2' for Picking or a '3' for Replenishment.

A code to specify what type of movement information is being displayed. Values are:

- 1: Putaway Information
- 2: Picking Information
- 3: Replenishment Information

Defining Movement Instructions

This section provides an overview of movement instructions, lists a prerequisite, and discusses how to:

- Set the process mode.
- Define common movement instruction criteria.
- Define specific movement instruction criteria.
- Set processing options for the Movement Instructions program (P46095).

Understanding Movement Instructions

You define movement instructions to control which locations that the system suggests for putaway, picking, and replenishment. A movement instruction table contains many parameters that you specify to refine the list of potential locations to the smallest possible number.

When you set up your movement instructions, you define the following information:

- Whether to use fixed or random locations.
- Which random rule to use if you use random locations.
- Whether to restrict the movement to a zone.
- Which zone to use for the location search if you use zones.
- Which tiebreaker method to use to rank equally suitable locations.
- Whether to use minimum and maximum percentages for putaway and picking.

You can also define specific movement instructions. For putaway, you can define:

- Whether to select empty locations or locations that already contain the same items as those you need to store.
- Whether to allow the system to convert larger units of measure into smaller units of measure.
- Whether to completely fill partially filled locations.

- Whether to completely fill or top off partial units of measure, such as half-filled pallets.

For picking and replenishment movements, you can define:

- Whether to move the oldest items in a location first to avoid spoilage or obsolescence.
- Whether to allow the system to convert smaller units of measure into larger units of measure, such as combining cases to form a pallet.

You define a fixed location to use for one purpose. Conversely, a random location is any location that matches the criteria that you define, such as:

- The location characteristics specified in the random rule.
- Whether the location characteristic is required or optional.
- The priority of the optional characteristic.
- Whether the item should include or exclude the specified location characteristic for the search.

When you search for locations, the system identifies many locations that match the search criteria. You can use tiebreakers to select the best location from all the matching locations. You can also specify the process mode to use. You can select to:

- Maximize warehouse space.
- Maximize employee productivity.
- Use other criteria that you define.

Process Mode

Warehouses generally have limited space, so you need to use the available space as efficiently as possible. You also need to make each employee's trips through the warehouse as efficient as possible to maximize the quantity of items that each employee moves per trip.

You set the process mode to direct the system to a movement instruction table that:

- Maximizes space by filling locations to their maximum capacity and emptying partially filled locations as quickly as possible.
- Maximizes productivity by minimizing the number of putaway, picking, and replenishment trips in the warehouse.
- Uses other criteria that you define to optimize warehouse space and employee efficiency.

Common Movement Instruction Criteria

Putaway, picking, and replenishment instructions share many of the same parameters. You set these parameters to refine the list of potential locations to the smallest possible number.

For items that have serial numbers, the system tracks movement on an individual basis in the primary unit of measure. You cannot group the items into greater units of measure unless you are working with memo lots. During the putaway, picking, and replenishment processes, all movement reports and transactions for items with serial numbers display one item for each detail line.

On the movement instruction tables, you must set the From quantity to 1 or 0. The system does not allow you to use breakdown, top off, or minimum utilization percentages with items that have serial numbers.

Specific Movement Instruction Criteria

Putaway, picking, and replenishment have parameters that are specific to each movement type. These parameters further refine the list of potential locations.

When the system processes movement criteria for picking and replenishment, it excludes locations that do not have adequate available quantity or adequate inbound inventory.

If you are cross docking inventory, you must define the movement criteria for picking so that the system selects inventory from the receiving location first.

Prerequisite

Set up unit of measure groups.

See Also

Setting Up Fixed Locations and Zones in the Warehouse Management Guide

Setting Up Unit of Measure Groups in the Warehouse Management Guide

Forms Used to Define Movement Instructions

Form Name	Form ID	Navigation	Usage
Movement Instructions Revisions	W46095E	Warehousing Movement Rules (G46311), Putaway Instructions, Picking Instructions, or Replenishment Instructions Click the Add button on the Work With Movement Instructions form.	Set the process mode. Depending on whether you are working with putaway instructions, picking instructions, or replenishment instructions, the system displays the Putaway Table field, Picking Table field, or Replenishment Table field (respectively).
Putaway Movement Instructions Revisions	W46095E	Warehouse Movement Rules (G46311), Putaway Instructions Click the Add button on the Work With Movement Instructions form.	Define common or specific movement instruction criteria.
Picking Movement Instructions Revisions	W46095E	Warehouse Movement Rules (G46311), Picking Instructions Click the Add button on the Work With Movement Instructions form.	Define common or specific movement instruction criteria.
Replenishment Movement Instructions Revisions	W46095E	Warehouse Movement Rules (G46311), Replenishment Instructions Click the Add button on the Work With Movement Instructions form.	Define common or specific movement instruction criteria.

Setting the Process Mode

Access the Movement Instructions Revisions form.

Putaway

A code to specify what type of movement information is being displayed.
Values are:

- 1: Putaway information
- 2: Picking information
- 3: Replenishment information

Picking

A code to specify what type of movement information is being displayed.
Values are:

- 1: Putaway information
- 2: Picking information
- 3: Replenishment information

Replenishment

A code to specify what type of movement information is being displayed. Values are:

- 1: Putaway information
- 2: Picking information
- 3: Replenishment information

Proc Mode

A user-defined code (46/PC) that determines the putaway processing method. Values are:

- P*: Productivity mode. The system suggests the fewest locations possible to minimize the number of putaway and picking trips.
- S*: Space maximization mode. The system maximizes the use of space by trying to top off partially filled locations. This mode also minimizes inventory fragmentation.

Defining Common Movement Instruction Criteria

Access the Putaway Movement Instructions Revisions, Picking Movement Instructions Revisions, or Replenishment Movement Instructions Revisions form.

Putaway Instructions - Putaway Movement Instructions Revisions

OK Delete Cancel Tools

Branch/Plant: 27

Putaway Table: BM1 Explosive Products (boomer)

Process Mode: S Space Optimization

Display Seq	UM	UM GP	From Quantity	Method Code	Random Rule	Putaway Zone	Put TB	Min Putaway	Max Put	B D	Top Off	A P
1.00	PL		1.00	R	HAZ	BOOMER	2	N	N	Y	Y	Y
2.00	CA		0.00	R	HAZ	BOOMER	2	N	N	Y	Y	Y
3.00	BK		0.00	R	HAZ	BOOMER	2	N	N	N	N	N
4.00												

Putaway Movement Instructions Revisions form

To define common movement instruction criteria:

- On the Work With Movement Instructions form, complete the Branch/Plant field:
- To define common movement instruction criteria for a particular movement, select one of the following options and click Add:
 - Putaway
 - Picking
 - Replenishment
- On the applicable revisions form, complete the field that applies to the movement for which you are defining movement instruction criteria:
 - Branch/Plant
 - Putaway Table
 - Picking Table

- Replenishment Table

4. Complete the Process Mode field and click OK:

Defining Specific Movement Instruction Criteria

Access the Putaway Movement Instructions Revisions, Picking Movement Instructions Revisions, or Replenishment Movement Instructions Revisions form.

Putaway Zone	A code (system 46/type ZN) that identifies areas in the warehouse where goods are put away or stored.
Min Putaway	A code that indicates whether the system suggests a location if putaway will not fill that location to at least the minimum percentage capacity defined through Location Profile Detail (P460201). Valid codes are: <i>Y</i>: Use the minimum utilization percentage when searching for putaway locations <i>N</i>: Do not use the minimum utilization percentage when searching for putaway locations
Max Pick	A code that indicates whether you want the system to suggest locations according to the maximum quantity of an item that you can pick from a location. You use maximum picking quantity only for fixed locations, which you define through Fixed Locations (P46012). Valid codes are: <i>Y</i>: Yes, use the maximum quantity that you can pick from a location to suggest locations, and if the quantity requested exceeds the maximum pick quantity for the location, search for another location <i>N</i>: No, do not use the maximum picking quantity when suggesting picking locations
B D	A code that indicates whether you allow the system to break a unit of measure (such as a pallet) down into smaller units of measure (such as cases). Valid codes are: <i>Y</i>: Yes, allow breakdown into smaller units of measure <i>N</i>: No, do not allow breakdown into smaller units of measure
Top Off	A code that indicates whether you want the system to attempt to complete an incomplete unit of measure (such as a half-filled pallet) in an existing location during putaway. Valid codes are: <i>Y</i>: Yes, search for locations with incomplete units of measure to top them off <i>N</i>: No, do not search for locations with incomplete units of measure
A P	A code that indicates whether you want the system put away partial units of measure. You must also specify on Unit of Measure Definition by Item (P46011) that you allow breakdown. If you set Allow Partial Units to <i>N</i>, you must also set Breakdown to <i>N</i>. Valid codes are: <i>Y</i>: Yes, put away partial units of measure <i>N</i>: No, do not put away partial units of measure
FIFO	A code that indicates whether the system considers an item's receipt date when it searches for pick locations. Valid codes are:

	<i>Y</i>: Yes, use the oldest receipt date (First In First Out method) when searching for pick locations <i>N</i>: No, do not use the oldest receipt date when searching for pick locations When you set this field to <i>Y</i> (yes), this setting overrides the tiebreaker rule.
R U	A code that indicates whether you allow roll-up during picking. Valid codes are: <i>Y</i>: Allow roll-up <i>N</i>: Do not allow roll-up
R P	A code that indicates whether you allow replenishment from a location.
Replen Zone	A code (system 46/type ZN) that identifies replenishment zones, which are areas in the warehouse from which items are retrieved to replenish or refill picking locations. You assign zones to locations using Location Master (P4100).
Repl TB	A number that identifies the tiebreaker you want to use for this replenishment rule when multiple locations satisfy the criteria. The system uses the tiebreaker to rank the tied locations. Tiebreakers are (hard coded) as follows: <i>1</i>: Sequence locations using pick to clear logic. The system uses the locations containing the smallest available quantity first. <i>2</i>: Sequence locations using pick from fewest with best fit logic. The system uses the locations that will contain the least residual quantity when the replenishment is complete. <i>3</i>: Sequence locations using pick from fewest logic. The system uses the location containing the smallest available quantity first. If there is not enough quantity to fill the request, the system suggests additional locations, but only the least number of locations that are necessary to complete the request. <i>4</i>: Sequence locations according to the replenishment sequence number. If you do not assign sequence numbers, and you use this tiebreaker, the system chooses between equal locations based on their alphanumeric sequence. You define sequences on Location Profile (P46020). <i>5</i>: Sequence locations according to proximity to the shipping location, using the closest locations first.

Setting Processing Options for Movement Instructions (P46095)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, the availability of fields on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by the prefix ZJDE or XJDE. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Display

Select the Display tab.

1. Enter a '1' for Putaway, a '2' for Picking or a '3' for Replenishment 1. Enter a '1' for Putaway, a '2' for Picking or a '3' for Replenishment

A code to specify what type of movement information is being displayed.
Values are:

- 1: Putaway Information
- 2: Picking Information
- 3: Replenishment Information

CHAPTER 7

Working with Putaway Requests

This chapter provides an overview of putaway requests, and discusses how to:

- Create putaway requests.
- Locate existing putaway requests.

Understanding Putaway Requests

You create putaway requests to store items that you receive in the warehouse. A putaway request contains information about the item, such as:

- Branch/plant
- Item number
- Unit of measure
- Quantity
- Transaction document information

The system uses this information to create suggestions for putaway, based on the putaway movement instructions and other information that you define.

Creating Putaway Requests

This section provides an overview of creating putaway requests, lists prerequisites, and discusses how to:

- Create putaway requests interactively.
- Override the unit of measure structure.
- Set processing options for PO Receipts (P4312).
- Cross dock with the workbench.
- Create putaway requests by batch.

Understanding Putaway Request Creation

As you receive the items on a purchase order, you can create a putaway request to generate suggestions for putaway locations and then store the items. This procedure is the most common method of creating putaway requests.

You can set the processing options in the PO Receipts program (P4312) to determine whether you:

- Create requests only.
- Create requests and process them through the subsystem into suggestions.
- Do not create any requests.

If you create putaway requests only, you must create location suggestions and confirm location suggestions separately; however, you can automatically confirm location suggestions during location selection.

If you do not create putaway requests through purchase order receipts, items that you receive will remain in the location where you receive them. You can then create putaway requests by reversing the receipt of the order, setting the program's processing options to create putaway requests, and receiving the order again. You also can use manual replenishment to create a putaway request.

During receipt of a purchase order, you can override the item's default unit of measure structure if the item's actual unit of measure structure is different. For example, you might remove the largest unit of measure, such as a pallet, from the incoming item's unit of measure structure and use the next-largest unit of measure for putaway. You might do this to avoid occupying pallet space in your warehouse with cases. This reduces the efficient use of your space. For example, if you receive a partial pallet of compact discs, you can override the pallet's unit of measure and use cases or eaches for putaway.

After you change a unit of measure structure, the system verifies the following:

- The last level that you specified in the structure is the primary unit of measure.
- The units of measure are listed in order from largest to smallest and are part of the defined UOM structure for the item.
- The structure uses whole number conversions between units of measure.
- Each unit of measure contains only one partial quantity for that unit.

The system overrides unit of measure structures for items with assigned serial numbers. These items are listed individually (quantity of 1) in Level 1 as the primary unit of measure.

You can also override the quantity, containers, weight, repack code, and tax code for each level of the unit of measure structure. This override alters the item characteristics and can change the location that you use for putaway.

The system displays warehouse overrides only if you activate warehouse control in Branch/Plant Constants (P41001). After you activate warehouse control, the system inputs the receipt location (which you enter on the Branch Location Definition form) when you enter a purchase order. Note that you can also use warehouse overrides to change an item's default unit of measure structure so that the system uses a smaller unit of measure during putaway. You cannot use warehouse overrides to specify a unit of measure if you have not defined it on the Item Unit of Measure Definition form and in the item UOM conversions.

If you use receipt routing in the Procurement system, the system can create a putaway request when you move the items to the on-hand step, which creates a receipt.

Items with assigned serial numbers are tracked individually in the primary unit of measure, and you cannot group them into greater units of measure. The system creates one putaway request for each item with a serial number.

Cross Docking

Cross docking enables you to receive and distribute products directly from the dock of a distribution center. Cross docking eliminates the need to move quantities to a storage location before picking and enables you to fulfill orders directly.

There are two methods for cross docking:

- When you receive the items that are included on an inbound purchase order, the system retrieves the quantity on backorder, creates a cross docking putaway requests when the backorders are released, and then creates pick requests with the receiving location as the suggested pick location. Note that cross docking putaway requests have a special status code, 295 (46/PS), that differentiates them from other putaway requests. The system uses requests with a status of 295 for audit purposes and does not create suggestions for them.
- When you receive a sales order, you can use the Planned Cross Docking Workbench program (P4614) to plan the allocation of inbound products based on receipt dates and shipping dates and can prioritize the allocation. Also, you can update shipment dates based on supply and demand and schedule the shipments.

When you receive a sales order, you can use the Planned Cross Docking Workbench program (P4614) to plan and prioritize the allocation of inbound products based on receipt dates and shipping dates. This program also enables you to specify the priority number for each cross dock movement. You can also review and update shipment dates based on supply and demand, indicate that a line on a sales order needs to be cross docked in anticipation of incoming supply, and schedule both inbound and outbound shipments. The system displays sales order lines (including backordered sales order lines depending on setup) as demand and purchase order lines and work orders as supply, with the quantity that is available for each line.

You do not need to have a warehouse and use the Warehouse Management system to perform cross docking. You can use the Sales Order Management, Procurement, and Work Orders systems to perform cross docking. For example, you might need to use a specific purchase order number or work order number to fulfill sales orders. By associating a sales order line with a specific purchase order number or work order number, you can establish priority for fulfilling the sales order line and use the Shipment Confirmation program (P4205) to indicate that the sales order line is ready to be picked and shipped directly from the receiving location.

If you use the Warehouse Management system, then the system uses standard movement processing. This means that the system records the movement of cross docked inventory as an override to standard picking suggestions and instead creates a pick suggestion, which you must confirm.

When you perform planned cross docking, the system first determines whether there are any sales orders that contain a cross docking order number that matches either the purchase order that you are receiving or the work order that you are completing. If there are associated purchase orders or work orders, the system allocates inventory and hard commits the quantity to those sales orders first.

Next, if there is inventory remaining, the system allocates the inventory according to the cross docking priority based on a sales order line's scheduled pick up date. If the scheduled pick up date precedes or is equal to the receipt date and if you have indicated in the Sales Order Entry program (P4210) or through the Cross Docking Workbench (P4614) that the sales order line is eligible for cross docking, then the system sorts the sales order lines in ascending order by date.

The system continues allocating inventory until either no inventory remains or no more sales order lines need to be cross docked. If you are using the Warehouse Management system, residual inventory is moved to either the receiving location or completions location through standard movement processing the system creates a putaway request. If there is inadequate inventory for fulfilling a sales order line, then the system splits the sales order line, fulfills and hard-commits the quantity requested, and advances the sales order line's status to make it eligible for shipment. The remaining sales order line remains unfulfilled, and you can adjust the order dates and priorities to ensure that the sales order line is eventually fulfilled.

Prerequisites

Before you complete the tasks in this section:

- Set up the inclusion rule for the order for which you want to create a putaway request.

- For cross docking, you may need to define the movement instructions for picking so that the system selects the receiving location first.
- For cross docking, you may need to set the processing options for the PO Receipts program (P4312) to display backordered sales orders and perform cross docking.
- For new items that you want to be eligible for cross docking, in the Item Master program (P4101), select the option for cross docking on the Item Master Revisions form's Additional Information tab. Note that the system automatically transfers the cross docking setting to the item branch information; you do not have to select the option for cross docking in the Item Branch program (P41026). However, if you do select the option for cross docking in the Item Branch program, then you must manually select the option for cross docking in the Item Master program.
- For existing items that you want to be eligible for cross docking, select the option for cross docking in the Item Master program (P4101). Note that the system does not automatically transfer the cross docking setting to the item branch information; you must select the cross docking option for each item/branch combination in the Item Branch program.
- In the PO Receipts program (P4312) or the Work Order Completions program (P31114), set the appropriate processing options on the Cross Docking tab.
- In the Document Type Maintenance program (P40040), set up document types.
- In the Supply/Demand Inclusion Rules program (P34004), set up inclusion rules.

See Also

Setting Up Inclusion Rules in the Warehouse Management Guide

Forms Used to Create Putaway Requests

Form Name	Form ID	Navigation	Usage
Work With Purchase Orders to Receive	W4312F	Inbound Warehousing Operations (G4611), Purchase Order Receipts	Locate a purchase order that you want to receive.
Additional Selection Criteria	W3121F	Inbound Warehousing Operations (G4611), Purchase Order Receipts Locate a record on the Work With Purchase Orders to Receive form, and from the Row menu, select P.O. Detail. On the P.O. Detail form, select Added Selections from the Form menu.	Create a putaway request interactively by selecting Receipt and clicking OK.
Warehouse Overrides	W46UOMA	On the Work With Purchase Orders to Receive form, select a record and click Select. On the Purchase Order Receipts form, select a record and from the Row menu, select Warehouse Override.	Override the unit of measure structure.
Planned Cross Docking Workbench Revisions	W4614B	Outbound Warehousing Operations (G4612), Planned Cross Docking Workbench On the Work With Planned Cross Docking Workbench form, select a record and click Select.	Cross dock with the workbench.

Creating Putaway Requests Interactively

Access the Additional Selection Criteria form.

Overriding the Unit of Measure Structure

Overriding the UOM is only possible for Branch Plants that have the License Plate process turned off

Access the Warehouse Overrides form.

Level 1 Quantity

The total quantity of the item in the item's level 1 unit of measure. You use the Unit of Measure Conversion Information program (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last or lowest level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary

UM 1

The item's level 1 unit of measure. You use Unit of Measure Conversion Information (P41002) to define an item's unit of measure structure. You define the largest unit of measure in the structure as the level 1 unit of measure.

The smallest unit of measure, which is also the primary unit of measure, depending if the item is Dual UOM, highest number, is the last or lowest level in the structure.

For example, a unit of measure structure could be as follows:

Level Unit of Measure

1: Pallet

2: Box, where 10 boxes equal 1 pallet

3: Case, where 5 cases equal 1 box

4: Interpack, where 8 interpacks equal 1 case

5: Each, where 10 eaches equal 1 interpack

In this example, the level 1 unit of measure is a pallet, and the level 5 unit of measure is an each, which is the primary unit of measure for the item in the example.

You can have up to five levels in an item's unit of measure structure.

Container 1

A code (table 46/EQ) that identifies the storage container for this item in its level 1 unit of measure. A storage container can be:

- An open container, where items are stored on the container (for example, a pallet)
- A closed container, where items are stored in the container (for example, a box)

You use the Container Codes program (P46091) to define storage containers. You use the Unit of Measure Definition by Item or Group program (P46011) to assign a storage container to an item in a specific unit of measure and indicate whether it is an open or closed container for this item at the UOM.

Setting Processing Options for PO Receipts (P4312)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options define the default information that the system uses during PO Receipts (P4312).

1. Inquiry Order Type

Indicate the type of document. This user-defined code (00/DT) also indicates the origin of the transaction. PeopleSoft has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you initially enter them.) The following prefixes for document types are defined by PeopleSoft, and PeopleSoft recommends that you not change them:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Payroll documents.

I: Inventory documents.

O: Purchase order documents.

J: General accounting and joint interest billing documents.

S: Sales order processing documents.

You must enter a value that has been set up in UDC 00/DT.

2. Receipt Document Type

Indicate the type of document. This user-defined code (00/DT) also indicates the origin of the transaction. PeopleSoft has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.) The following prefixes for document types are defined by PeopleSoft, and PeopleSoft recommends that you not change them:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Payroll documents.

I: Inventory documents.

O: Purchase order documents.

J: General accounting and joint interest billing documents.

S: Sales order processing documents.

You must enter a value that has been set up in UDC 00/DT.

Status Default

These processing options control which status codes the system uses for receipts.

1. Acceptable Incoming Status Code 1

Specify a next status. Orders are eligible for receipt when they have the next status that you specify for this processing option.

Before you complete this processing option, review the order activity rules that you have set up.

2. Acceptable Incoming Status Code 2

Specify a next status. Orders are eligible for receipt when they have the next status that you specify for this processing option.

Before you complete this processing option, review the order activity rules that you have set up.

3. Acceptable Incoming Status Code 3

Specify a next status. Orders are eligible for receipt when they have the next status that you specify for this processing option.

- Before you complete this processing option, review the order activity rules that you have set up.
- 4. Outgoing Status for Partial Receipts** Specify the next status that the order moves to after a partial receipt.
Before you complete this processing option, review the order activity rules that you have set up.
- 5. Outgoing Status for Closing** Specify the next status that the order moves to after the system closes or fully receives the detail line.
PeopleSoft recommends that you use status code 999 for closed or fully received detail lines.
- 6. Outgoing Status for Canceling** Specify the next status that the order moves to after the system cancels a detail line.
PeopleSoft recommends that you use status code 999 for canceled detail lines.

Display

These processing options control whether the following types of information appear in the PO Receipts program (P4312) and whether they can be changed:

- Sales order backorder information
- Lot information
- Cost information
- Kit information
- Receiving mode

- 1. Sales Order Backorders** Specify how you want to release backordered sales orders.
1: Automatically display the Sales Order Backorder Release form.
Blank: Do not release sales orders.
- 2. Lot Information** Specify whether you want the system to display lot information, such as the Lot field and the Expiration Date field. Values are:
Blank: Do not display lot information.
1: Display the lot information fields.
2: Display and protect the lot information fields.
- 3. Cost Protection** Specify whether you can change costs.
1: The costs fields appear on the form, but cannot be changed.
2: The system hides cost information. The Cost field does not appear.
Blank: The Cost field appears on the form and can be overridden.
- 4. Kits** Specify whether the system displays kit component lines or only the parent line.
1: The system displays kit parents (FUTURE).
2: The system displays kit components.

For the B73.3 version of the software, you can only receive kits at the component level.

5. Receiving Mode

Specify the mode that the system uses to receive detail lines. Values are:

- 1: Receive by purchase order
- 2: Receive by item
- 3: Receive by general ledger account
- 4: Receive by shipment number

When you select only one detail line on the Work With Receipts menu, the system displays all the detail lines on the Receipt Revisions menu that meet the criteria of the mode that you have entered.

For example, if you enter 1 for the receiving mode and select one detail line on the Work With Receipts form, the system displays all lines for the purchase order. If you enter 2 for the receiving mode and select one detail line on the Work With Receipts form, the system displays all lines for the selected item.

If you enter 3 for the receiving mode and select one detail line on the Work With Receipts form, the system displays all lines for the general ledger account. If you enter 4 for the receiving mode and select one detail line on the Work With Receipts form, the system displays all lines for the shipment number.

Process

These processing options control whether you are able to perform procedures such as:

- Updating supplier information.
- Specifying a lot number to use as a default value.
- Automatically selecting all detail lines for receipt.
- Entering serial number information.
- Entering quantity information manually or automatically.
- Reviewing or updating landed cost information.
- Printing a receipt traveler document.
- Recording supplier analysis information.
- Sending a message to a receipt originator automatically.
- Specifying a sales order status for direct ship receipt.

1. Supplier Update Mode

Update the supplier number in the Item/Branch table (F4102).

1: Update the supplier number in the Item/Branch table (F4102) if the value for the supplier number is 0.

2: Update the supplier number in the Item/Branch table (F4102) regardless of the value for the supplier number.

Blank: Do not update supplier number.

2. Lot Default

Specify whether the system uses default lot and location information in the Purchase Order Receipts program (P4312).

I: The system uses the location and lot number from the primary item balance location in the Item Location table (F41021).

Blank: Do not use default lot and location information.

3. Option Default

Specify whether you want the system to automatically select all detail lines for receipt, which prevents you from having to manually select each detail line.

I: Automatically select all detail lines for receipt.

Blank: Do not automatically select all detail lines for receipt.

4. Serial Numbers

Specify whether you want the system to allow you to enter serial number information. Note that before you enter serial number information, you should verify that you have entered Y (yes) in the Serial Number Required Y/N field on the Item Branch Revisions form (F4102).

I: You can enter serial number information in the Serial Number table (F4220).

Blank: You cannot enter serial number information in the Serial Number table (F4220).

5. Quantity Entry

Indicate whether you want manual or automatic entry of quantity information.

I: Enter the quantity manually.

Blank: The system uses the open quantity as the default value for this field.

6. Landed Costs

Indicate whether you want to manually apply landed costs or whether the system automatically applies landed costs. Note that you can manually apply landed costs after a receipt on the Receipts Inquiry form, which you access through the Standalone Landed Cost program (P43214).

1: Display the Landed Cost Selection form, where you can review or update the information.

2: Automatically apply the landed cost rule without displaying the Landed Cost Selection form.

Blank: Do not apply any landed costs.

If you are applying landed costs to an item that is in the Receipt Routing process, you must specify a value of 2 for this processing option.

7. Receipt Traveler Document

Specify whether you want the system to print a receipt traveler document after each receipt.

I: Automatically print a receipt traveler document after each receipt.

The system uses the version that you specified in the Versions tab.

Blank: Do not print a receipt traveler document after each receipt.

8. Supplier Analysis

Indicate whether you want the system to capture supplier analysis information.

I: The system records information such as item numbers, dates, and quantities for every purchase order in the Supplier/Item Relationships table (F43090). To make supplier analysis most effective, enter 1 for this processing option and set the processing options for the Purchase

Order Entry program (P4310) and the Voucher Match program (P4314) to capture the same information.

Blank: The system does not capture supplier analysis information.

9. Text Deletion

For future use.

10. Direct Ship Status

Specify the sales order status for direct ship receipt. The status that you enter in this field determines the next status of the sales order.

11. Receipt Routing

Activate receipt routing. Values are:

1: Activate receipt routing.

Blank: Do not activate receipt routing.

12. Enter the default route type to be used to search for a receipt route.

If you leave this field blank, the system searches for route type equivalent to blank.

13. Journal Entries

Summarize journal entries. If you are tracking commitments using the PA or PU ledgers, you cannot use this processing option.

1: Summarize journal entries.

Blank: Do not summarize journal entries.

14. Activate Blind Materials Issue (EPM)

Activate the Materials Issue function. You can activate the Material Issue function only if you are using MPM and are working with an MPM receipt. Also, you must set the Call Materials Issue flag in the Line Type Control Constants File table (F40205). Values are:

1: Activate the Materials Issue function.

Blank: Do not activate the Materials Issue function.

15. Allow negative On-hand Qty and 16 Activate Auto G/L Batch Posting

Use this processing option to specify whether the system allows a negative on-hand quantity.

Tolerance

These processing options control the way that the system performs tolerance checking for detail lines.

1. Quantity and Amount

Indicate whether the system checks to determine if a detail line's quantity and amount exceed the tolerance percentage. To check your tolerance, you can access the Tolerance Setup program (P4322).

1: Display a warning when the detail line exceeds the tolerance.

2: Display an error message when the detail line exceeds the tolerance.

Blank: Do not check quantities and amounts to determine whether they exceed tolerance.

2. Date

Determine whether the system checks to determine if a detail line's date is outside of the tolerance date range. To check your tolerance date range, you can access the Supplier/Item Information program (P43090).

1: Display a warning when the receipt date in the detail line is outside of the tolerance date range.

2: Display an error message when the receipt date in the detail line is outside of the tolerance date range.

Blank: Do not check receipt dates for detail lines to determine whether they exceed tolerance.

Warehousing

These processing options control how the PO Receipts (P4312) interfaces with the Warehouse Management system.

1. Putaway Mode

Specify how the system processes putaway requests.

1: Create a putaway request only. You must create location suggestions and confirm location suggestions separately.

2: Create a putaway request and process the request into suggestions using the subsystem.

3: Receive goods directly into the reserved locations, and do not create requests or suggestions.

Blank: Do not create a putaway request. If you do not create putaway using the Purchase Order Receipts program (P4312), the items that you receive will remain in the location to which they were received. Then you can create putaway requests manually or create them by reversing the receipt of the purchase order, setting this processing option to create putaway requests by reversing the purchase order receipt, and receiving the purchase order again.

2. License Plate Generation Method, 3 Build Default Structure, and 4 Display assign item to License Plate Window

Use this processing option to specify the license plate generation method, how to build the default structure, and whether to display and assign the item to the License Plate window.

Currency

These processing options control which date the system uses as the effective date and also whether the exchange rate can be changed.

1. Effective Date

Determine which date the system uses as the effective date. Values are:

1: Use the G/L date.

Blank: Use today's date.

2. Protect Rate

specify whether you can change the exchange rate.

1: You cannot change the exchange rate.

Blank: You can change the exchange rate.

Versions

These processing options enable you to enter the version for each application. If you leave any of the following processing options blank, the system uses the ZJDE0001 version.

1. Open Order Inquiry (P4310)

Define the version that the system uses when you are using the Open Order Inquiry program.

	When you select a version, review the version's processing options to ensure that the version meets your needs.
2. Sales Order Backorder Release (P42117)	Define the version that the system uses when you are using the Sales Order Backorder Release program. When you select a version, review the version's processing options to ensure that the version meets your needs.
3. Receipt Traveler (P43512)	Define the version that the system uses when you are using the Receipt Traveler Release program. When you select a version, review the version's processing options to ensure that the version meets your needs.
4. Receipt Routing (P43250)	Define the version that the system uses when you are using the Receipt Routing program. When you select a version, review the version's processing options to ensure that the version meets your needs.
5. Putaway Requests Subsystem (R46171)	Use this processing option when you are processing putaway requests into putaway suggestions using the subsystem and need to specify the version of Location Selection that you want to use. If you leave this processing option blank, the system uses XJDE0007.
6. Pick Requests Subsystem (R46171)	Specify which version of the Location Selection Driver program (R46171) that the system uses to process pick requests into picking suggestions using the subsystem during planned cross docking. If you leave this processing option blank, the system uses version XJDE0007.
7. Online Reservations (P46130)	Specify the version of Online Reservations that the system uses. If you leave this processing option blank, the system uses ZJDE0001.
8. Purchase Order Entry (P4310)	Define the version that the system uses when you are using the Purchase Order Entry program. When you select a version, review the version's processing options to ensure that the version meets your needs.
9. G/L Journal Entries (P0900049)	Define the version that the system uses when you are using the G/L Journal Entries program. You can only review versions for this program in the interactive versions list. When you select a version, review the version's processing options to ensure that the version meets your needs.
10. Landed Cost Selection (P43291)	Define the version that the system uses when you are using the Landed Cost Selection program. When you select a version, review the version's processing options to ensure that the version meets your needs.
11. Test Results Revisions (P3711)	Define the version that the system uses when you are using the Test Results Revision program. When you select a version, review the version's processing options to ensure that the version meets your needs.

12. Blind Materials Issue (P31113)	Determine which version the system uses when performing the Materials Issue from Receipts function. When you select a version, review the version's processing options to ensure that the version meets your needs.
13. Generate Post G/L Ledger	Use this processing option to specify whether the system generates the G/L ledger.

Flex Acct

This processing option controls whether you are working with flexible accounting.

1. Flex Accounting	Specify whether flexible accounting is activated. Activate flexible accounting if you are using the Cost Management System, or if you are working with flexible sales accounting. <i>1:</i> Activate flexible accounting. <i>Blank:</i> Do not activate flexible accounting.

Bulk

These processing options control how the system processes bulk transaction information.

1. Quantities	Specify how the system records bulk transaction quantities. <i>1:</i> Record the difference between ambient and standard quantities received as a temperature gain or temperature loss. <i>2:</i> Update the unit cost as the extended cost divided by the standard quantity. <i>Blank:</i> Quantities are purchased and received in standard mode.

Interop

This processing option controls whether the system performs outbound interoperability processing.

1. Transaction Type	Specify a transaction type for the interoperability transaction. If you leave this processing option blank, the system does not perform outbound interoperability processing.

Workflow

These processing options control how the system performs the notification process.

1. Receipt Email	Specify the recipient of the email that the system automatically sends when goods are received. <i>1:</i> Send email to the buyer. <i>2:</i> Send email to the person who originated the transaction. <i>3:</i> Send email to both the buyer and the person who originated the transaction.
2. Completion Email	Specify the recipient of the email that the system automatically sends when an item is received that is related to a work order . <i>1:</i> Send email to the planner. <i>Blank:</i> Do not send email.

3. Notify Unit Cost Changes

specify the recipient of the email that the system automatically sends when the unit cost/lump sum changes on a purchase order detail line during receipts. Values are:

- 1:* Send email to purchase order originator.
- 2:* Send email to project manager (MPM only).
- 3:* Send email to buyer.
- 4:* Send email to purchase order originator, project manager (MPM only), and buyer.
- Blank:* Do not send email.

4. Notify Quantity Changes

Specify the recipient of the email that the system automatically sends when the quantity on the order changes. Values are:

- 1:* Send email to purchase order originator.
- 2:* Send email to project manager (MPM only).
- 3:* Send email to buyer.
- 4:* Send email to purchase order originator, project manager (MPM only), and buyer.
- Blank:* Do not send email.

Cross Docking

This should be the same font as the other TAB headings. and call it Cross Docking Tab

1. Cross Docking

Blank: Do not cross dock

- 1:* Use opportunistic
- 2:* Use planned
- 3:* Use both planned and opportunistic

2. Pick Request

Specify whether the system creates a pick request when performing planned cross docking during the purchase order receipts process. Values are:

- Blank:* The system does not create a pick request.
- 1:* The system creates a pick request.

3. Override Next Status for Sales Orders

Specify the default next status code (40/AT) for the sales order only if you are using planned cross docking during the purchase order receipts process. If you leave this processing option blank, the system uses the normal sales order next status that is contained in the order activity rules.

4. From Sales Order Status

Specify the from status code (40/AT) for the sales order to which to process planned cross docking only if you are using planned cross docking during the purchase order receipts process.

5. Thru Sales Order Status

Specify the through status code (40/AT) for the sales order to which to process planned cross docking only if you are using planned cross docking during the purchase order receipts process.

Cascade Receipt

This should be the same font as the other TAB headings. and call it Cascade Receipt Tab

1- Cascade Receipt	Determine whether the system activates the cascade receipts process. In addition to setting this processing option, you must also set the processing option for receiving mode (located on the Display tab) to 2 if you want the system to activate the cascade receipts process. Values are: <i>Blank:</i> Do not activate the cascade receipts process. <i>1:</i> Activate the cascade receipts process.
2- Tolerance Checking	Prevent the system from applying a quantity that has slightly exceeded the customer's required shipment quantity to the next open purchase order during the cascading receipts process. Values are: <i>Blank:</i> The system can apply the quantity in excess to the next open purchase order. <i>1:</i> The system performs tolerance checking by quantity. <i>2:</i> The system performs tolerance checking by percentage.
3- Tolerance Checking by Quantity	Specify whether the system performs tolerance checking. Values are: <i>Blank:</i> The system does not perform tolerance checking. <i>1:</i> The system performs tolerance checking.
4- Tolerance Checking by Percentage	Specify the percentage that the system uses for tolerance checking. If you leave this processing option blank, the system does not perform tolerance checking.

WIM

1. Wine Industry Module	Use this Processing Option to determine whether system activates wine industry module processing or if this is a regular item receipt. <i>Blank:</i> Do not activate Wine Industry Module Processing (which means this is a receipt of a regular item not a Wine related item) <i>1:</i> Activate Wine Industry Module Processing

Cross Docking with the Workbench

Access the Planned Cross Docking Workbench Revisions form.

To perform cross docking with the workbench:

1. Review the sales order lines, purchase order lines, and work order lines in the detail area.
 Note that you can complete or update the fields in the detail area only for sales order, order types. For purchase order or work order, order types, the records/rows are for review only.
2. Locate the row that contains the sales order line that you want to cross dock and complete the Cross Docked field.

This field is a code that associates items or order lines with cross-dock processing. This code might indicate whether an item or an order line is eligible for cross-docking, whether it was cross docked, or whether it needs to be cross docked. When it is assigned to an item or item-branch, this code indicates that the item or the item in the branch/plant is eligible for cross docking. When it is assigned to an order line, this code indicates that the order line needs to be cross docked. Enter a 1 to turn on cross docking, or leave this field blank to turn it off.

3. To associate a sales order line with a purchase order number or work order number, click the search button in the Cross Dock Order Number field.
4. On the Planned Cross Docking Inbound Search & Select form, select the row that contains the order number that you want to associate with the sales order line and click Select.
5. On the Planned Cross Docking Workbench Revisions form, review the information in the detail area and click Resort to update the detail area with the sales order lines prioritized by ascending promised date and priority.

Note that if you need to update detailed sales order line information, purchase order line information, or work order line information, you can select the appropriate option from the Row menu.

6. To further prioritize sales orders for cross docking, complete the Cross Dock Priority field and click Resort.

The Cross Dock Priority field indicates the priority that the cross-docking system follows when assigning supply quantity to the sales orders. This priority indicates the sequence in which cross-docked sales orders are fulfilled for a given date. Sales order lines with a lower value receive a higher priority than lines with a higher value. The system performs only numeric edits on this value. If you do not specify a priority, or if the same priority is given to more than one order line, the orders will be fulfilled in the sequence of order number and order type.

The system sorts the order lines by ascending promised date and then priority. If the promised dates for two or more order lines are the same, then the system sorts the order lines only by priority.

7. When you are finished prioritizing and resorting the order lines, click OK.

See Also

Working with Detail Information in the Sales Order Management Guide for more information about entering sales orders

Locating Quantity Information in the Sales Order Management Guide for more information about reviewing item availability

Entering Order Detail Information in the Procurement Guide for more information about entering purchase orders

Creating Work Orders in the Work Orders Guide

Locating Existing Putaway Requests

This section provides an overview of locating existing putaway requests, and discusses how to:

- Locate putaway requests.
- Set processing options for Request Inquiry (P4600).

Understanding Existing Putaway Requests

You might need to locate an existing putaway request. For example, to verify that you have created a putaway request for an incoming item, you locate the request using unique criteria, such as an order number, a document type, or an item number.

You also can cancel a putaway request and stop further processing. For example, if the items that you received are damaged, you cancel the putaway request. If the putaway request that you are canceling has associated suggestions that are being confirmed, you must first cancel the suggestions and then cancel the request.

Forms Used to Locate Existing Putaway Requests

Form Name	Form ID	Navigation	Usage
Putaway Requests Inquiry	W4600A	Inbound Warehousing Operations (G4611), Putaway Requests	Locate putaway requests.

Locating Putaway Requests

Access the Putaway Requests Inquiry form.

Request Batch Number The batch number assigned to one set of putaway, picking, or replenishment requests. This number comes from next numbers for system 46.

From License Plate You can enter the From license plate number that identifies a collection of items or other license plates that are transferred from a specific location.

Setting Processing Options for Request Inquiry (P4600)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, the availability of fields on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you can set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by the prefix ZJDE or XJDE. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use the processing option to specify the request status for the system to use.

1. Default Request Status Specify the default request status to filter by. If you leave this processing option blank, the system filters by the default status of 200 (Ready to Suggest).

Display

Specify the types of requests for the system to display.

1. Type of Requests to view Specify the request types that you want to review. Values are:

- 1:* Putaway requests
- 2:* Picking requests
- 3:* Replenishment requests
- Blank:* Putaway requests

Manual Planner

Use these processing options to specify the planning information for the system to use. Manual Planner provides a way to manually select a To location for the putaway request.

1. Auto Location Selections	Specify whether the system automatically assigns a location to an item when entering the Manual Planner screen. Values are: <i>Blank:</i> Do not automatically assign locations. <i>I:</i> Automatically assign locations.
2. Immediate Task/Trip Assignment	Specify whether the system assigns trips and tasks. When you confirm the creation of your suggestions and leave the screen. Values are: <i>Blank:</i> Do not assign trips and tasks. <i>I:</i> Assign trips and tasks.
3. Task/Trip Assignment Version	Specify which version the system uses for task and trip assignment. If you leave this processing option blank, the system uses version XJDE0001 (for Putaway Suggestions).
4. Ship Ascending Date	Determine whether the system displays a warning or an error message for the ascending date rule check. Valid Values are: <i>Blank:</i> Display a warning. <i>I:</i> Display an error.

Picking Options

Use these processing options to specify the shipping information for the system to use.

1. Next Status Code Sales Orders	Override the next status for sales order lines when requests are canceled.
2. Shipping Location	Specify whether the system allows you to override shipping locations. Values are: <i>Blank:</i> Do not allow overrides. <i>I:</i> Allow overrides.

Creating Putaway Requests by Batch

This section discusses how to:

- Run the Batch License Plate Putaway Request (R46L140).
- Set processing options for Batch License Plate Putaway Request (R46L140).
- Run the Batch Putaway Request (R46140).
- Set processing options for Batch Putaway Request (R46140).

Running the Batch License Plate Putaway Request (R46L140)

To create full license plate putaway requests for parent license plates, select Warehouse Move Documents (G4621), Batch License Plate Putaway Requests. Also, requests are not created for license plates that already have open requests or contain items that are committed on suggestions.

Note. You base data selection on License Plate Master (F46L10) information. Typically, you would select by branch/plant and the desired 'from' location to putaway license plates.

Setting Processing Options for Batch License Plate Putaway Request (R46L140)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, the availability of fields on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by the prefix ZJDE or XJDE. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Processing

Use these processing options to specify how the system processes batch license plate putaway requests.

1. Process Requests through Subsystem	Specify whether to process requests into suggestions through the subsystem. Values are: <i>1</i> : Process requests into putaway suggestions through the subsystem. <i>Blank</i> : Do not process records through the subsystem.
2. Subsystem Version of R46171 Location Selection Version	Specify the version of Location Selection R46171 to be used if you are processing requests through the subsystem. If you leave this processing option blank, the system uses XJDE0007.

Running the Batch Putaway Request

To create item putaway requests for items not on license plates, select Warehouse Move Documents (G4621), Batch Putaway Requests. Item quantity already on an open request and quantity that is committed are excluded from the new request. A separate request is created by branch/plant, location, item, and lot for the items in the data selection.

Note. This UBE can be used with or without the license plate enhancement functionality. Data selection is based on Item Location (F41021) information.

Setting Processing Options for Batch Putaway Request (R46140)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, the availability of fields on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by the prefix ZJDE or XJDE. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Processing

Use these processing options to specify how the system processes batch putaway requests.

1. Process Requests through Subsystem

Specify whether to process requests through the subsystem. Values are:

1: Process requests into putaway suggestions through the subsystem.

Blank: Do not process records through the subsystem.

2. Subsystem Version of R46171 Location Selection Version

Specify the version of Location Selection R46171 to be used if you are processing requests through the subsystem. If you leave this processing option blank, the system uses XJDE0007.

CHAPTER 8

Working with Putaway Reservations

This chapter provides an overview of putaway reservations and discusses how to:

- Create putaway reservations.
- Change existing putaway reservations.

Understanding Putaway Reservations

You can create putaway reservations to reserve space for incoming items. You can receive incoming items directly into specific locations that you reserve, or you can allow the putaway location selection process to use the reservation. This makes putaway more efficient because space is already reserved for the items prior to receipt. You can create a reservation for all the items on a purchase order line, and you can split the line into multiple location reservations.

Working with reservations is an optional task during warehouse putaway processes.

Interactive Method

You create putaway reservations interactively using the Online Putaway Reservations program (P46130). This program allows you to reserve space in locations for incoming items. For example, you create a reservation interactively for one item in an incoming shipment. You can enter your location reservations directly online. When you create putaway reservations online, if the item quantity is too large to fit in one location, the system might suggest multiple locations. If the system cannot create a suggestion for a purchase order line, it displays an error message. You can create reservations manually for any lines on the purchase order. If an error relates to only part of the purchase order line's quantity, you can still make reservations for the remaining line quantity. The system displays an error message only for the quantity in error.

You can also use the Online Putaway Reservations program to cancel reservations. You cancel reservations to make the reserved location's space available again.

When you access the Online Putaway Reservations program, the system displays both purchase orders that have a corresponding reservation and purchase orders that do not have corresponding reservations. You can differentiate between purchase orders that do and do not have reservations by reviewing open quantity information on the Online Putaway Reservations form. If a purchase order has a corresponding reservation, no open quantity exists because the quantities have already been assigned to a reserved location. Conversely, if a purchase order does not have a corresponding reservation, open quantity exists for which the system can suggest a location to reserve.

Batch Method

You can reduce the system processing time required for creating reservations by creating them in a batch for many purchase orders at one time, thus eliminating the need to enter reservations one order at a time.

When you run the Batch Putaway Reservations program (R461301), the system can:

- Create putaway reservations
- Print audit report

You control which functions the system performs by setting processing options in the Batch Putaway Reservations program.

Alternate Reservations

You can create alternate putaway reservations if you do not agree with the system's suggestions for reserved putaway locations.

As you create alternate suggestions for reserved locations, the system displays new locations for possible reservations. The system also can display the previously reserved location if there have not been any changes to either the putaway movement instructions or the inventory levels.

Creating Putaway Reservations

This section lists a prerequisite and discusses how to:

- Create putaway reservations for all order lines.
- Create putaway reservations for individual order lines.
- Create putaway reservations by batch.
- Create alternate putaway reservations.
- Set processing options for Online Putaway Reservations (P46130).

Prerequisite

Check the processing options for the Online Putaway Reservations program (P46130) to ensure that you have specified the types and statuses of purchase orders that you want the system to display.

Forms Used to Create Putaway Reservations

Form Name	Form ID	Navigation	Usage
Online Putaway Reservations Detail	W46130B	Inbound Warehousing Operations (G4611), Putaway Reservations On the Online Putaway Reservations form, select a record and click Select.	Create putaway reservations for all order lines by selecting Suggest All from the Form menu. Create putaway reservations for individual order lines, and create alternate reservations by selecting Suggest Row from the Row menu.

Creating Putaway Reservations for All Order Lines

Access the Online Putaway Reservations Detail form.

Creating Putaway Reservations for Individual Order Lines

Access the Online Putaway Reservations Detail form.

Creating Putaway Reservations by Batch

To create putaway reservations by batch, select Inbound Warehousing Operations (G4611), Batch Reservations.

Creating Alternate Putaway Reservations

Access the Online Putaway Reservations Detail form.

Setting Processing Options for Online Putaway Reservations (P46130)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use these processing options to specify the order type and statuses for the system to use.

1. Order Type	Use this processing option to specify the default order type of the purchase orders that you wish to display. Order types are defined in UDC 00/DT.
2. From Status	Use this processing option to specify the default from status of the purchase orders that you wish to display.
3. To Status	Use this processing option to specify the default to status of the purchase orders that you wish to display.

Changing Existing Putaway Reservations

This section provides an overview of changing putaway reservations, and discusses how to:

- Change existing reservations by splitting order lines to multiple locations.
- Change existing reservations manually.

Understanding Putaway Reservation Changes

You can manually change a reserved putaway location to a different location. You would do this if you wanted to change the current reserved location to one that is more convenient for your employees or is closer to locations containing other similar items.

The system does not verify that the total item quantity for which you have reserved locations equals the total item quantity for the purchase order line With Online Putaway Reservations.

Forms Used to Change Existing Putaway Reservations

Form Name	Form ID	Navigation	Usage
Online Putaway Reservations Detail	W46130B	Inbound Warehousing Operations (G4611), Putaway Reservations On the Online Putaway Reservations form, select a record and click Select.	Change existing reservations by splitting order lines to multiple locations. Select a record and click Copy.

Changing Existing Reservations by Splitting Order Lines to Multiple Locations

Access the Online Putaway Reservations Detail form.

Changing Existing Reservations Manually

Access the Online Putaway Reservations Detail form.

Quantity Reserved The quantity of units affected by this transaction.

CHAPTER 9

Working with Putaway Suggestions

This chapter lists prerequisites and discusses how to:

- Create putaway suggestions.
- Create task and trip assignment and move documents.
- Confirm putaway suggestions.

Prerequisites

Before you complete the tasks in this section:

- Verify that you have set up order groups and process groups for your stock items.
- Verify that you have set up putaway instruction tables to designate specific locations based on the items' order and process groups.
- Verify that you have set up putaway instruction tables to designate specific locations based on Fixed Locations, Random Rules, Max Quantities by Zone, Location dimensions, etc.

Creating Putaway Suggestions

This section provides an overview of creating putaway suggestions, and discusses how to:

- Create alternate putaway suggestions.
- Create putaway suggestions interactively.
- Create putaway suggestions by batch.
- Set processing options for Location Selection Driver (R46171).

Understanding Putaway Suggestion Creation

After you create putaway requests, you create putaway suggestions to move the items to warehouse locations.

You can create putaway suggestions by batch using the Location Selection Driver program (R46171). You also can create alternate putaway suggestions by running a version of the Location Selection Driver program with the appropriate processing options selected for other suggestions. This version of the program allows you to replace existing suggestions with alternate suggestions. The suggestions may be different from previous suggestions if you have changed your movement instructions or other related setup or if the inventory levels have changed.

Batch Method

You create putaway suggestions by batch to process putaway requests and move inventory on a regular basis. You can compensate for a large volume of putaway requests by creating putaway suggestions several times each day or using the subsystem to process them immediately. You typically run batch programs during off-peak hours when more system resources are available.

When you run the Location Selection Driver program (R46171), the system can:

- Select all outstanding putaway requests Based on data selection
- Update each request's status in the Warehouse Requests table (F4600)
- Create putaway location movement suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm putaway suggestions

You control which functions the system performs by setting processing options in the Location Selection Driver program (R46171).

Interactive Method

You can create suggestions interactively to select locations for putaway. Either you can allow the system to suggest a location or you can manually specify putaway information such as the quantity, the unit of measure, and the location.

If you want the system to suggest locations automatically when you access the Manual Putaway Location Planner form, you must set the appropriate processing option on the Manual Planner tab for the Request Inquiry program (P4600).

Alternate Putaway Suggestions

You can create alternate putaway suggestions if you do not agree with the system's suggestions for putaway locations. You create alternate suggestions by running a version with the appropriate processing options set of the Location Selection Driver program (R46171) for other suggestions.

Creating alternate suggestions replaces any previous location suggestions. With alternate suggestions, you can access new inventory locations that you might have added since you created the first suggestions.

If you have not changed inventory locations in your warehouse, and you want to create suggestions for locations that differ from previous suggested locations, you must change the putaway instructions table. For example, you could change the putaway instructions table to choose a new putaway zone or use a different tiebreaker rule to choose locations. If you do not change the putaway instructions or something else in the setup, such as Process Selection, Fixed Locations, Max or Min quantities/percentages, etc., the Location Selection Driver program suggests the same locations as in the previous suggestions.

When you run the Location Selection Driver program, the system can:

- Delete existing putaway suggestions and resets the commitments caused by/related to the original suggestions in the F41021 and F4602/F46L12.
- Reset each request's status in the Warehouse Requests table (F4600)
- Create alternate putaway location movement suggestions

You control which functions the system performs by setting processing options in the Location Selection Driver program.

Forms Used to Create Putaway Suggestions

Form Name	Form ID	Navigation	Usage
Manual Putaway Location Planner	W4600A	Inbound Warehousing Operations (G4611), Putaway Requests On the Putaway Requests Inquiry form, select a record and from the Row menu, select Manual Planner.	Create putaway suggestions interactively. To allow the system to create a suggestion, select a record and choose Select from the Row menu. If you have already set the processing option on the Manual Planner tab to automatically suggest locations when you enter the screen, you do not need to select the row to create suggestions. To manually create a suggestion, choose the row that contains the putaway request, enter the appropriate quantity, unit of measure, lot/serial, and location, and then click OK.

Creating Putaway Suggestions Interactively

Access the Manual Putaway Location Planner form.

To create Putaway Suggestions Interactively, select Manual Putaway Location Planner (P4600).

Creating Putaway Suggestions by Batch

To create putaway suggestions by batch, select Inbound Warehousing Operations (G4611), Process Putaway Requests.

Creating Alternate Putaway Suggestions

To create alternate putaway suggestions, select Inbound Warehousing Operations (G4611), Process Putaway Requests.

Note. You must have the Resuggest Processing Option turned on.

Setting Processing Options for Location Selection Driver (R46171)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Task and Trip

Use these processing options to specify the whether the system should assign tasks and trips and the version of the Task and Trip Assignment program.

1. Immediate Task and Trip Assignment	Use this processing option to specify whether the system immediately assigns tasks and trips. Values are: <i>Blank:</i> Do not assign any tasks and trips. <i>1:</i> Assign tasks and trips immediately.
2. Version of the Task and Trip Assignment program (R46471)	Use this processing option to specify which version of the Task and Trip Creation program (R46471) the system uses. If you leave this processing option blank, the system uses version XJDE0001.

Audit

Use this processing option to specify the audit report generation.

1. Audit Report	Use this processing option to specify whether the system generates the audit report and, if so, whether to include glossary text in the report: <i>Blank:</i> No audit report <i>1:</i> Generate the audit report. <i>2:</i> Generate the audit report and include a glossary for any message. <i>3:</i> Generate the audit report and include a complete glossary at the end of the report.

Confirmation

Use these processing options to specify whether to have the system automatically confirm suggestions and the version of the Batch Confirmation program to use.

1. Confirm Suggestions	Use this processing option to specify whether the system automatically confirms suggestions. Values are: <i>Blank:</i> Do not automatically confirm suggestions. <i>1:</i> Automatically confirm suggestions.
2. Version of the Batch Confirmation Program	Use this processing option to determine which version of the Batch Confirmations program (R4617) the system uses. If you leave this processing option blank, the system uses XJDE0001.

Resuggestions

Use this processing option to specify how the system processes movement requests.

1. Resuggest Requests

Use this processing option to determine how the system processes requests. Values are:

Blank: Process only new, non-processed requests.

I: Resuggest movement requests.

Replenishment

Use these processing options to specify the automatic replenishment method and version for the system to use.

1. Method to Use for Automatic Replenishment Quantities

Use this processing option to enter the method that the system uses to determine automatic replenishment quantities. Values are:

Blank or 2: Use the maximum replenishment method. The quantity to replenish is the quantity that fills the location.

I: Use the economic replenishment method. The quantity to replenish is retrieved from the fixed location.

2. Version of the Task and Trip Assignment Program to Run for Replenishments

Use this processing option to specify which version of the Task and Trip Creation program (R46471) the system uses for replenishment. If you leave this processing option blank, the system uses XJDE0003.

Edit**1. Enter Allowed Lot Status Group to validate**

Lot Group is the name of a user defined list of allowed non-blank lot status codes. Entry of a Lot Group name in the Processing Option will allow this Application to process lots whose lot status code is defined within the specified Lot Group Name.

Creating Task and Trip Assignment and Move Documents

This section provides an overview of task and trip assignments and move documents, and discusses how to:

- Create tasks and trips.
- Set processing options for Task and Trip Creation (R46471).

Understanding Task and Trip Assignment and Move Documents

After you have created suggestions for putaway, picking, or replenishment, you can create task/trip assignments (if you have not already done so when creating suggestions) and create customized move documents to help your warehouse personnel efficiently move inventory through your warehouse.

Tasks and Trips

The system can assign task and trip numbers to suggestions when you create and process suggestions. A task is a group of suggestions, and a trip is each suggestion in the task.

If the system did not assign task and trip numbers to suggestions when you created and processed suggestions, you can run a batch process for task and trip number assignment.

When you run the Task and Trip Creation program (R46471), it is important to activate data sequencing so that you can verify the information that the system uses to assign task and trip numbers.

When you run the Task and Trip Creation program, you can specify the following information:

- Maximum quantity information, such as the maximum number of tasks and trips (by leaving the default value of blank or zero, you can specify an unlimited number of tasks and trips)
- Whether you want the system to run the Move Slips program (R46472), which prints the supporting documents with the task and trip assignments

After you run the Task and Trip Creation program, you can print a supporting documents such as Move Slips (Summary Document) or the Move Tags to review task and trip assignments.

Summary Document

Use the Move Slips program (R46472) to print a summary document that contains information for all the suggestions that you created. The summary document is also referred to as a move document or move slip. This report page breaks by the task number. The summary document includes information such as:

- Trip number
- To and From locations
- Item number and description
- Quantity information
- Unit of measure information

After you create and review the summary document, you can print move tags, which enable warehouse personnel to plan the movement of inventory throughout the warehouse.

Before you create the summary document, verify that the system has created suggestions.

Move Tags

When you run the Move Tags program (R46473), the system creates move tags for the suggested location during putaway, picking, and replenishment. A move tag contains information such as:

- The item that warehouse personnel are moving
- The item unit of measure
- To and From locations

You can print tags for each trip or for each unit of measure moved on the trip, depending on your definition of the item on Item Unit of Measure Definition Revisions. You can scan the move tags to facilitate movements, storage, confirmation, and other downstream material handling and counting operations.

Examples of other Warehouse Management programs from which you can automatically print move tags (by setting processing options or by choosing Row exits or Form exits) are:

- Batch Putaway Reservations (R461301)
- Location Selection Driver (R46171)
- Move Slips (R46472)
- Warehouse Movement Confirmations (P4617)

Before you create move tags, verify that the system has created suggestions.

Creating Tasks and Trips

To create tasks and trips, select Warehouse Move Documents (G4621), Create Tasks and Trip.

Setting Processing Options for Task and Trip Creation (R46471)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Task Control

Use these processing options to specify the limits for the system to use.

1. Maximum number of Tasks	Use this processing option to enter the limit that specifies the maximum number of tasks to be created in the run of the program. You must enter a numeric digit. To specify no limit, enter zero.
2. Maximum number of Trips	Use this processing option to enter the limit that specifies the maximum number of trips to be created in the run of the program. You must enter a numeric digit. To specify no limit, enter zero.
3. Maximum number of Units	Use this processing option to enter a limit that specifies the maximum number of units of items to be processed in the run of the program. You must enter a numeric digit. To specify no limit, enter zero.
4. Maximum number of Trips per Task	Use this processing option to enter a limit that specifies the maximum number of trips per task. You must enter a numeric digit. To specify no limit, enter zero.
5. Maximum number of Units per Task	Use this processing option to enter a limit that specifies the maximum number of units per task. You must enter a numeric digit. To specify no limit, enter zero.
6. Maximum Weight per Task	Use this processing option to enter a limit that specifies the maximum combined weight per task. You must enter a numeric digit. To specify no limit, enter zero.
7. Weight Unit of Measure	Use this processing option to enter the weight unit of measure for the previous maximum weight per task processing option (#6).
8. Maximum Volume per Task	Use this processing option to enter a limit for the maximum combined volume per task. You must enter a numeric digit. To specify no limit, enter zero.
9. Volume Unit of Measure	Use this processing option to enter the volume unit of measure for the previous maximum volume per task processing option (#8).

Print

Use these processing options to specify the printing defaults for the system to use.

1. Print Move Documents	Use this processing option to determine whether the system prints move documents. Values are: <i>Blank:</i> Do not print move documents.

2. Data Item for Page Breaking

I: Print move documents.

Enter the Data Dictionary Item Alias.

Use this processing option to put a data item in the data sequencing that you want to be the last data item in the data sequencing that you want to cause task numbers to be created. Every other data items in the data sequencing will just be used for sequencing of the trips within the tasks, instead of being new tasks themselves.

Versions

Use these processing options to specify the versions for the system to use.

1. Version for Move Slips (R46472)

Use this processing option to specify which version of the Move Slips program (R46472) the system uses. If you leave this processing option blank, the system uses XJDE0001.

2. Version for Carton Reorganization (P4620)

Use this processing option to specify which version of the Carton Reorganization program (P4620) the system uses. If you leave this processing option blank, the system uses ZJDE0001.

Process

Use these processing options to specify how the system processes cartons.

1. Perform Carton Recommendation

Use this processing option to determine whether the system performs carton recommendation. Values are:

Blank: Do not perform carton recommendation.

I: Perform carton recommendation.

2. Carton Detail Information

Use this processing option to specify whether the system generates carton detail information. Values are:

Blank: Do not generate carton detail information.

I: Generate carton detail information.

3. Cartonize to Totes

Use this processing option to determine whether the system recommends only those cartons that are designated as totes. A carton can be designated as a shippable container, a tote container, or neither in the Container and Carton Codes program (P46091). Values are:

Blank: Recommend only shippable cartons.

I: Recommend only tote containers.

Creating the Summary Document

To create the summary document, select Warehouse Move Documents (G4621), Summary Document.

Creating Move Tags

To create move tags, select Warehouse Move Documents (G4621), Move Tags.

Confirming Putaway Suggestions

This section provides an overview of putaway suggestion confirmation, and discusses how to:

- Confirm putaway suggestions interactively.
- Confirm putaway suggestions by batch.
- Override putaway suggestions.
- Set processing options for Warehouse Movement Confirmations (P4617).

Understanding Putaway Suggestion Confirmation

If you agree with the system's suggestions for putaway locations, you confirm them interactively or by batch. If you do not agree, you can override the suggestions and specify a location of your choice, or you can cancel the existing suggestions and stop further processing.

When you confirm suggestions for putaway, you:

- Reduce on-hand inventory in the receiving location
- Increase on-hand inventory in the putaway location

Putaway confirmation ensures that the system's records match actual inventory movements by updating the following tables:

- Item Location File (F41021)
- Location Detail Information (F4602)
- Item Ledger File (F4111)
- Warehouse Requests (F4600)
- Warehouse Suggestions (F4611)
- Warehouse Task Header (F4601)
- License Plate Master (F46L10)
- Location Capacity (F46L30)

Note. The F4602 table is only updated for branch plant that have license plate turned off and that all F46L tables are only updated for the branch pants that have License Plate turned ON. Other license plate tables that are updated turning this process are: License Plate Item Detail F46L11, License Plate History F46L99, and License Plate Commitment F46L12

Interactive Method

If you agree with the system's suggestions for putaway locations, you confirm them interactively using the Warehouse Movement Confirmations program (P4617).

Batch Method

You can confirm putaway suggestions by batch when you run the Batch Confirmations program (R4617). However, before you confirm putaway suggestions by batch, you should review and override suggestions as necessary because after you run the Batch Confirmations program, you cannot reverse the confirmations.

The system automatically confirms suggestions if there are no errors during the confirmation process, and prints all the suggestions that were not confirmed. If you set the appropriate processing option, the system prints the corresponding description of the error on the report after processing all suggestions.

Overrides

You can override putaway suggestions and specify a location of your choice, or you can split a suggestion into two locations. You also can cancel the existing suggestions and stop further processing.

Forms Used to Confirm Putaway Suggestions

Form Name	Form ID	Navigation	Usage
Movement Confirmations	W4617A	Inbound Warehousing Operations (G4611), Putaway Confirmation On the Work With Warehouse Confirmations form, select a record, select Confirm from the Row menu, select Process from the Form menu, and then click Cancel.	Confirm putaway suggestions interactively.
Override Suggestion	W4617C	On the Work With Warehouse Confirmation form, select a record and select Override from the Row menu.	Override putaway suggestions.

Confirming Putaway Suggestions Interactively

Access the Process Transactions form.

Confirming Putaway Suggestions by Batch

To confirm putaway suggestions by batch, select Inbound Warehousing Operations (G4611), Batch Putaway Confirmations.

Overriding Putaway Suggestions

Access the Override Suggestion form.

Putaway Confirmation - Override Suggestion

Cancel Form Row Tools

Task Number: 13
 Trip Number: 1,000
 Item Number: 210
Mountain Bike, Red

Branch/Plant: 27

Open Quantity
 Suggestion: 10 EA
 Request: EA

Records 1 - 2

Quantity	UM	From Location	To Location	Lot	Reason Code	Lot Grade	Lot Potency	Level 1 Total Quantity
10	EA	R..	5.A .1					1
		R..						

Override Suggestion form

Task Number

The task number is a unique number assigned to a grouping of suggestions.

Level 1 Total Quantity

The total quantity of the item in the item's level 1 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last/lowest level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.

Level 1 Container

A code (table 46/EQ) that identifies the storage container for this item in its level 1 unit of measure. A storage container can be:

- An open container, where items are stored on the container (for example, a pallet)
- A closed container, where items are stored in the container (for example, a box)

You use Container Codes (P46091) to define storage containers. You use Unit of Measure Definition by Item or Group (P46011) to assign a storage container to an item in a specific unit of measure and indicate whether it is an open or closed container for this item at the UOM.

Setting Processing Options for Warehouse Movement Confirmations (P4617)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Display

Use these processing options to specify how the system displays the information.

1. Program Mode	Use this processing option to enter the program mode. Values are: <i>Blank or 1:</i> Putaway confirmation 2: Pick confirmation 3: Replenishment confirmation
2. Phase Control Code	Use this processing option to enter the phase control code. Values are: <i>Blank or 1:</i> Default display first phase of a two-phase confirmation 2: Default display second phase of a two-phase confirmation
3. Default Suggestion Status	Use this processing option to specify the default suggestion status that the system uses for the display. If you leave this processing option blank, the system uses 340 (Suggestion Printed).
4. Shipping Location	Use this processing option to specify whether the system allows you to override shipping locations. Values are: <i>Blank:</i> Do not allow overrides. 1: Allow overrides.

Prompts

Use these processing options to specify how the system processes movement.

1. Location Verification	Use this processing option to specify whether the system requires you to enter the location verification code for movement confirmation. Values are: <i>Blank:</i> Do not require entry of the location verification code. 1: Require entry of the location verification code.
2. Auto Inquire	Use this processing option to specify whether the system performs an automatic inquiry when you choose the appropriate menu selection. Values are: <i>Blank:</i> Do not perform automatic inquiry. 1: Perform automatic inquiry.

Move Tags

Use these processing options to specify what the system prints and the version to use.

1. Move Tag	Use this processing option to specify whether the system reprints a move tag whenever the quantity or location of a suggestion is changed. Values are: <i>Blank:</i> Do not reprint the move tag. 1: Reprint the move tag.
2. Bar Code	Use this processing option to specify whether the system prints bar code information. Values are: <i>Blank:</i> Do not print bar code information.

- I*: Print bar code information.
- 3. Unit of Measure** Use this processing option to specify whether the system prints the unit of measure structure. Values are:
- Blank*: Do not print the unit of measure structure.
- I*: Print the unit of measure structure.
- 4. Item/Location Quantity to Be Printed on the Tag** Use this processing option to specify whether the system prints the item and location quantities on the tags. Values are:
- Blank*: Do not print a quantity.
- I*: Print the on-hand quantity.
- 2*: Print on-hand quantity + inbound quantity - outbound quantity - committed quantity.
- 5. Enter the number of Duplicate Copies to be printed for each tag** Use this processing option to enter the number of duplicate copies that the system prints for each tag.
- 6. Version of the move tags to be used** Use this processing option to specify which version of the Move Tags program (R46473) the system used. If you leave this processing option blank, the system uses XJDE0001.

Picking

Use these processing options to specify how the system processes information and which version of the Pack Confirmation program (P4216) to use.

- 1. Override Next Status for Sales Order Lines when Suggestions are Confirmed** Use this processing option to enter the next override status that the system uses for sales order lines when it confirms suggestions.
- 2. Override Next Status for Sales Order Lines when Suggestions are Cancelled** Use this processing option to specify the next override status that the system uses for sales order lines when it cancels suggestions.
- 3. Warning/Error Display for Ship Ascending Date Rule Checking** Use this processing option to specify whether the system displays a warning or an error message for the ascending date rule check. Values are:
- Blank*: Display a warning.
- I*: Display an error.
- 4. Version of Pack Confirmation P4216** Use this processing option to specify the version of the Pack Confirmation program.

Bulk Printing

Use these processing options to specify how the system uses the Bulk Pick Detail Report program (R46210) and which version to use.

- 1. Bulk Detail Report** Use this processing option to specify whether the system generates the Bulk Pick Detail report (R46210) when it confirms bulk pick suggestions. Values are:

Blank: Do not generate the Bulk Pick Detail report when confirming bulk pick suggestions.

I: Generate the Bulk Pick Detail report when confirming bulk pick suggestions.

2. Bulk Pick Detail Report (R46210) Version

Use this processing option to specify which version of the Bulk Pick Detail report (R46210) the system uses. If you leave this processing option blank, the system uses XJDE0001.

Carton Detail

Use these processing options to specify how the system uses the Carton Reorganization program (P4620) and which version to use.

1. Carton Detail Information

Use this processing option to determine whether the system generates the carton detail information. Values are:

Blank: Do not generate carton detail information.

I: Generate carton detail information.

2. Version of Carton Reorganization (P4620) to Use for Generating Carton Detail Information

Use this processing option to determine which version of the Carton Reorganization program (P4620) the system uses for generating carton detail information. If you leave this processing option blank, the system uses ZJDE0002.

Edits

Use this processing to enter allowed lot status information.

1. Enter Allowed Lot Status Group to Validate

Use this processing option to enter the allowed lot status group to validate. You can validate the lot status code against specified lot status group during the warehouse movement confirmation process in order to transfer on-hold item(s) with allowed lot status. The system validates the non-blank lot status codes against the user defined status code values. If the non-blank lot status codes exist in the Allowed Lot Status table (F41081), then the system treats the user defined lot status codes as blank and the on-hold item shall continue through the warehouse movement process.

CHAPTER 10

Working with Picking

This chapter provides an overview of picking and discusses how to:

- Work with pick requests.
- Work with pick suggestions.

Understanding Picking

Picking is the process of removing items from stock and moving them to the shipping dock to be shipped. The shipping dock is usually the default location for the outgoing items that you have defined on Branch/Plant Constants (P41001).

You create a pick request in response to a sales order (or a parts list, for manufacturing systems). You use pick requests to generate suggestions for locations from which to pick items. The system tracks the items in each location. You can find locations containing the items that you need to ship and then create suggestions to pick from those locations.

After you create suggestions, you confirm your movement of the items from the chosen picking location to the shipping dock and to update the system's inventory records. Then, you confirm shipment to indicate that you shipped the items to the customer.

Working with Pick Requests

This section provides an overview of pick requests, lists a prerequisite, and discusses how to:

- Create pick requests interactively.
- Set processing options for Sales Order Entry (P4210).
- Create pick requests by batch.
- Create bulk pick requests.
- Locate existing pick requests.
- Locate existing bulk pick requests.

Understanding Pick Requests

You create pick requests to pick and ship items for a sales order. A pick request contains information about the item, such as:

- Branch/plant
- Item number
- Unit of measure
- Quantity
- Transaction document information

The system uses this information to create suggestions for picking, based on the picking instruction tables that you define.

Interactive Method

As you enter a sales order, you can create a pick request to fill the sales order, which is the most common method of creating pick requests. You use these pick requests to create suggestions for picking locations.

You set the processing options for the Sales Order Entry program (P4210) to determine whether you:

- Create requests only
- Create requests and process through subsystem
- Do not create requests

If you create pick requests only, you must create and confirm location suggestions separately.

In addition to using the Sales Order Entry program to generate pick requests, you also can use the following Sales Order Management programs to generate pick requests, provided that you have set the processing options accordingly:

- Backorder Release and Report (R42118)
- Backorder Release (P42117)
- Sales Order Speed Status Update (P42040)
- Held Order Release (P43070)
- Transfer Order Processing (P4242)
- Work with Shipments (P4915)

To review warehouse information about a specific sales order line for which you are creating a pick request, you can use the Customer Service Inquiry, which you can access through the Customer Service row exit on the Work With Sales Order Headers form. Use the appropriate exits from the Customer Service Inquiry form to review the following information:

- The quantity requested for picking
- The date and time that the request was created
- Whether the request has suggested picking locations
- The current request status
- The total number of picking trips that are either cancelled or confirmed for the sales order line

If a sales order line is being processed by the Warehouse Management system, the Hold Code field on the form contains two asterisks (**).

Batch Method

If you do not create sales order pick requests during interactive sales order processing, you must create the sales order pick requests by batch. Run the Batch Picking Requests program (R46150) to select orders and create pick requests for them. You typically run the batch program during off-peak hours when more system resources are available.

When you run the Batch Picking Requests program, the system can:

- Select sales orders according to information that you have specified through the Data Selection processing options
- Create pick requests
- Update each request's detail line status in the Sales Order Detail table (F211)

Whether you create the sales order pick request interactively or through batch processing, you cannot make changes to the order after you begin processing it using the Warehouse Management system.

Bulk Pick Requests

If you have multiple pick requests that require your warehouse personnel to pick the same items from the same locations on a regular basis, you can consolidate the pick requests by items from multiple requests into one bulk picking request. This enables warehouse personnel to do one pick for the same items, increasing the efficiency of your warehouse.

Through data selection for Create Bulk Pick Requests (R46200), you can specify the criteria that the system uses to consolidate regular pick requests into a bulk pick request.

When you create a bulk pick request, the system changes the status of individual sales order pick requests from 200 (Request Created) to 298 (Closed Upon Consolidation). This change prevents the system from processing the sales order pick requests twice for the same quantities. Before you create and confirm bulk pick suggestions, you can either remove individual pick requests or all pick requests from the bulk pick request and restore them to their original status (200).

Existing Pick Requests

You might need to locate an existing pick request. For example, to verify that you have created a pick request for an item specified on a sales order, you locate the request using unique criteria such as an order number, a document type, or an item number.

You also might need to locate an existing pick request to override the shipping location (specified in either Branch/Plant Constants (P41001) or the preference profile for shipping/receiving locations). For example, the carrier might have arrived at a different shipping dock than you had expected. You can override the shipping location on the Picking Requests Inquiry form if the following conditions are met:

- The system has not already created a suggestion for the pick request.
- You have set up your warehouse to accommodate multiple shipping locations.
- You have set the appropriate processing option in the Request Inquiry program (P4600) to allow location overrides.

For bulk pick requests, you might need to review and verify the individual sales order pick requests that are part of the bulk request, so that you can either continue processing the bulk pick request, or remove any or all sales order pick requests from it.

You also can cancel a pick request and stop further processing. For example, if you want to cancel the sales order, provided that the sales order lines are not already being processed by the Warehouse Management system, you first cancel the pick request.

Prerequisite

Verify that you have set up inclusion rules on Branch Location Definition to select the steps in the order activity rules for the order type that you want to process. Only the steps that you select can generate pick requests.

Forms Used to Work with Pick Requests

Form Name	Form ID	Navigation	Usage
Customer Service Inquiry	W4210E	Outbound Warehousing Operations (G4612), Sales Order Entry	Create pick requests interactively.
Picking Requests Inquiry	W4600A	Outbound Warehousing Operations (G4612), Pick Requests	Locate existing pick requests.
Work With Bulk Request	W4600G	On the Picking Requests Inquiry form, select a record with status 210, and select Bulk Pick Requests from the Row menu.	Locate existing bulk pick requests. To remove a sales order detail line, select Remove Request from the Row menu. To remove all sales order detail lines, select Undo Consolidation from the Form menu.

Creating Pick Requests Interactively

Access the Customer Service Inquiry form.

Setting Processing Options for Sales Order Entry (P4210)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options specify default values, such as the document type, that the Sales Order Entry program (P4210) uses when other values are not entered for the transaction.

Except for the required order type, the following defaults apply during order entry only. If you are inquiring on written records, the system retrieves orders based on the order information in the form header first, and then it uses the parameters that you define in Inquiry processing options.

You can override information that appears on the header and detail forms. If information is hidden, the system processes orders based on the default information that is set up in the processing options or the master tables.

1. Order Type (Required)

Use this processing option to identify the type of document. Certain document type codes are reserved for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program.

You must enter a value that has been set up in UDC 00/DT.

If you use this version of the Sales Order Entry program (P4210) in other programs, the default values for the program in which the original order is created override the default values for the sales order. For example, if you use this version of the Sales Order Entry program in the Blanket Order Release program (P43060), the order line type in the blanket order overrides the default line type in the sales order.

2. Line Type

Use this processing option to specify a code that controls how the system processes lines on a transaction. Line types control the systems with which the transaction interfaces (such as General Accounting, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management). Values are defined on the Line Type Constants Revisions form (P40205) and include:

S: Stock item

J: Job cost

N: Nonstock item

D: Direct ship item

F: Freight

T: Text information

M: Miscellaneous charges and credits

W: Work order

On the Line Type Constants Revisions form, you can set up a line type for nonstock items that retrieves information from the Lot Master table (F4108), but does not commit quantities. The option, Edit the Item Master for Non-Stock Items, is used when the Inventory Interface is set for a nonstock item, such as D or N.

When you enter a direct ship item line type, the system uses a version of the Purchase Order Entry program (P4310) to create the purchase order that is related to this sales order. Specify the version in the Purchase Order Entry processing option on the Version tab of the processing options for the Sales Order Entry program (P4210).

When you enter a work order line type, the system creates the work order using the version of the Work Order Entry program (P48013) that you specify in the Work Order Entry processing option on the Versions tab of the processing options for the Sales Order Entry program.

If you use this version of the Sales Order Entry program in other programs, the default values for the program in which the original order is created override the default values for the sales order. For example, if you use this version of the Sales Order Entry program in the Blanket Order Release program (P43060), the order line type in the blanket order overrides the default line type in the sales order.

3. Beginning Status

Use this processing option to indicate the current point in the order process.

You must specify a user defined code (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using.

The combination of the beginning status and the next status must be a valid last status/next status combination in the Order Activity Rules table.

4. Override Next Status

Use this processing option to indicate the next step in the order process. You must specify a user defined code (40/AT) that has been set up in the order activity rules based on the order type and the line type that you are using.

The override status is another allowed step in the process. The combination of the beginning status and the override next status must be a valid last status and next status combination in the Order Activity Rules table (F40203).

In Warehouse Management, this status needs to be related (in the order activity rules) to the override next status for creating requests; this status becomes the last status after the request is created.

5. Line Number Increment

Use this processing option to specify the increment the system uses to automatically number your order lines. You should choose a whole number since other processes, such as kit entry and warehouse management, create decimal increments.

6. Reason Code

This memo-only field is used for reporting purposes. You can enter a value that has been set up in user defined code table (42/RC). Note that Reason Code 6 is reserved for PeopleSoft.

7. Override Transaction Unit of Measure

Use this processing option to specify the unit of measure for an item in an order. Values are defined in UDC 00/UM.

If you do not enter a value for this processing option, the system retrieves the primary unit of measure that is defined in the Item Master table (F4101).

8. Default Transaction Unit of Measure

Use this processing option to identify the value with which the system retrieves the transaction unit of measure when the override transaction unit measure is blank. Values are:

Blank: The system uses the primary unit of measure.

1: The system uses the pricing unit of measure.

9. Address Book Revisions

Use this processing option to specify whether the system prompts users to add new customers to the Address Book system during sales order entry. If you enter a customer address book number in the Sold To or the Ship To field that the system does not recognize, the system does not allow you to enter an order. Values are:

Blank: You must manually access Address Book Revisions and add customer information before entering an order

1: The system automatically displays Address Book Revisions

Whether you access Address Book Revisions from a Form menu option or choose the option to automatically add customers, the system uses the Address Book Revisions, version ZJDEC003.

10. Update Header to Detail

Use this processing option to specify whether the system updates corresponding information in the detail information form if you change the header information. Use Define Header Columns to Detail (P40HDR) table to identify the fields that system uses to update to the detail form. Values are:

Blank: The system does not update information in Sales Order Detail Revisions unless you choose the Populate option from the Header to Detail form menu.

I: The system automatically updates the detail lines to reflect changes that you make to header information.

11. Header Branch/Plant

Use this processing option to specify the value with which the system selects the default branch/plant for tracking costs. You can set up header branch/plant defaults based on the user ID or terminal, or based on the business unit for the Ship To address in Address Book Revisions (P0101). Values are:

Blank: The system uses the default location based on the user ID or terminal ID and displays the branch/plant in the order header form.

You set up the default branch/plant based on your user or terminal ID in Default Location and Printers (P400951).

I: The system uses the business unit that you specify on the Address Book Revisions form for the customer to which you are shipping the goods.

12. Default Branch/Plant

Use this processing option to specify the default branch/plant that appears in the order header.

13. Order Template

Use this processing option to identify a standard template that applies to all customers. You can create a standard template that lists frequently ordered items. Although the system displays this template for every order, you do not have to apply any or all of the items during order entry.

14. Customer Self Service Structure Type

Blank: show all related address numbers

Structure Type: show address numbers for that structure type

15. User ID default (CSS only)

For future use.

Use this processing option to specify whether the system supplies the Sold To header or the Ship To header as the User ID default in Customer Self-Service mode of Order Entry. Values are:

Blank: The system displays the User ID in the Sold To header.

I: The system displays the User ID in the Ship To header.

16. Override Sold To and Ship To Header (CSS only)

For future use.

Use this processing option to allow users to override the Sold To and Ship To fields in customer self service mode at the header level. Values are:

Blank: Do not allow override.

I: Allow override.

17. Override Carrier Number (CSS only)

For future use.

Blank: Cannot override Carrier Number

I: Override Carrier Number

18. Sold To Contact Record Type

A user defined code (01/W0) that identifies the Who's Who entry. Examples of values are:

A: Attention name

B: Billing

C: Contact name
E: Emergency Contact
O: Other
T: 1099 legal name

19. Ship To Contact Record Type

A user defined code (01/W0) that identifies the Who's Who entry. Examples of values are:

A: Attention name
B: Billing
C: Contact name
E: Emergency Contact
O: Other
T: 1099 legal name

Duplication

These processing options specify values, such as the document type, that the Sales Order Entry program (P4210) uses when you duplicate a sales order. If you click Copy on the tool bar in the Customer Service Inquiry form, the system duplicates information based on your processing option selection.

1. Order Type

Use this processing option to specify the order type of a duplicated document.

When you click Copy on the tool bar in the Browse/Inquiry form, the system creates a duplicate order with this order type. Certain document type codes are reserved for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program.

You must enter a value that has been set up in UDC 00/DT.

If you leave this processing option blank, the system uses values in this version that are from the Order Type processing option on the Defaults tab of the processing options for the Sales Order Entry program (P4210).

2. Beginning Status

Use this processing option to indicate the current status for the duplicated line. When you click Copy on the tool bar in the Browse/Inquiry form, the system creates a duplicate order at this status. You must use a user defined code (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using. The combination of the beginning status and the next status must be a valid last status/next status combination in the Order Activity Rules table.

3. Next Status

Use this processing option to indicate the next step in the order process for the duplicate order. You specify a user defined code (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using. The override status is another allowed step in the process. The combination of the beginning status and the override next status must be a valid last status/next status combination in the Order Activity Rules table.

For Warehouse Management, this status needs to be related (in the order activity rules) to the override next status for creating requests; this status becomes the last status after the request is created.

4. Copy Associated Text

Use this processing option to specify which messages and associated text are copied when you duplicate orders. Values are:

Blank: The system does not copy associated text or messages.

1: The system copies messages and text that are attached to an order detail line.

2: The system copies messages or text attached to the header, as well as messages attached to the order detail line.

3: The system copies messages or text attached to the header, but not a particular order detail line.

Order Holds

These processing options activate order hold processing. You must specify the hold code in any of the following processing options to activate order hold processing. You set up hold parameters in Hold Order Constants (P42090). Multiple hold codes might result in multiple holds for a single order. You must release the sales order from all holds before the system can process the order.

1. Customer Credit Check

Use this processing option to identify a credit hold code the system uses to automatically compare the credit limit that you set up for your customer in Customer Master Information against the order and any outstanding balances in accounts receivable.

You define the conditions that the system uses to place orders on hold in Order Hold Information (P42090) and attach those conditions to a hold code.

You must specify the hold code in this processing option to activate order hold processing.

You must enter a value that has been set up in UDC 42/HC.

2. Order Margin Check

Use this processing option to identify an order margin check the system uses to verify that all sales orders meet a specific margin.

The system uses the following equation to calculate margin:

$$(\text{Price} - \text{Cost}) / \text{Price} * 100 = \text{Margin}$$

You can define the conditions that the system uses to place orders on hold in Order Hold Information (P42090) and attach those conditions to a hold code.

You must specify the hold code in this processing option to activate the order hold processing.

You must enter a value that has been set up in UDC 42/HC.

3. Order Line Margin Check

Use this processing option to identify an order line margin check the system uses to verify that all order detail lines meet a specific margin.

The system uses the following equation to calculate margin:

$$(\text{Price} - \text{Cost}) / \text{Price} * 100 = \text{Margin}$$

You can define the conditions that the system uses to place orders on hold in Order Hold Information (P42090) and attach those conditions to a hold code.

You must specify the hold code in this processing option to activate the order hold processing.

You must enter a value that has been set up in UDC 42/HC.

4. Order Minimum Value Check	Use this processing option to identify a code the system uses to automatically compare the order minimum that you set up for your customer in Customer Billing Instructions against the order total. You can define the conditions that the system uses to place orders on hold in Order Hold Information (P42090) and attach those conditions to a hold code. You must specify the hold code in this processing option to activate order hold processing. You must enter a value that has been set up in UDC 42/HC.
5. Order Maximum Value Check	Use this processing option to identify a code the system uses to automatically compare the order maximum that you set up for your customer in Customer Billing Instructions against the order total. You can define the conditions that the system uses to place orders on hold and attach those conditions to a hold code. You must specify the hold code in this processing option to activate the hold code. You must enter a value that has been set up in UDC 42/HC.
6. Partial Order Hold	Use this processing option to identify a code the system uses to hold an entire order if quantity is not available to fill an order detail line. You can release a partial order hold at any time. The system can then backorder, cancel, or ship available quantities based on backorder information in the Customer Billing Instructions, Item Master Information, Item Branch/Plant Information and Branch/Plant Constants. You must enter a value that has been set up in UDC 42/HC.
7. Product Allocation Hold	Use this processing option to specify a hold code the system uses to restrict the amount of an item or item group that a customer or customer group can purchase. You must set up the Product Allocation preference in the Preference Master (P40070), activate the preference through the Preference Selection (R40400), set up the hold code information in Order Hold Information (P42090) and then activate preference profile processing in the P4210, Versions, Preference Profile processing option. You must enter a value that has been set up in UDC 42/HC.
8. Authorization Hold for Prepayment Processing	Use this processing option to identify the default value hold code for the Authorization Code in Prepayment Processing.
9. Settlement Hold for Prepayment Processing	Use this processing option to identify the default hold code for Settlement Prepayment Processing.
10. Order Process Hold	Use this processing option for Order Process Hold.
11. Approval Hold	Use this processing option to specify a code that the system uses to place the sales order on hold when revisions to an order require approval. The code that you enter can be AH or other values that have characteristics similar to AH. Regardless of the hold code that you specify, it must be set up in the Hold Order Constants program (P42090). The Hold Order Constants setup must be completed with a code type of L (Line) and a limit type of A (Amount).
12. Exclusive Adjustment Hold	Use this processing option to specify a code that the system uses to place the sales order on hold when mutually exclusive price adjustments have been

applied to a sales detail line and the conflict has not been resolved. The system issues a warning if mutually exclusive adjustments exist.

You can resolve conflicts by canceling or modifying exclusive adjustments using the Price History row exit. If conflicts exist when the order is accepted, the order will be placed on hold if this processing option is populated.

The code that you enter can be AH or other values that have characteristics similar to AH. Regardless of the hold code that you specify, this code must be set up in the Hold Order Constants program (P42090). The Hold Order Constants setup must be completed with a code type of L (Line) and a limit type of A (Amount).

You can define the conditions that the system uses to place orders on hold in Order Hold Information (P42090) and attach those conditions to a hold code. You must specify the hold code in this processing option to activate the order hold processing. You must enter a value that has been set up in user defined code table 42/HC.

13. Inactive Customer Hold Enter the order level hold code that the sales order should be placed on when a customer has a search type specified in the Inactive Customer search type processing option. This processing option will only work if the next one is also filled in. You will need both processing options to be able to put an inactive customer on a hold status.

14. Inactive Customer Search Type Specify the search type that will be used in F0101 (Address Book Master) to specify an Inactive customer. When you are entering a sales order, if a customer is of the search type that you specify in this processing option, the system places the sales order on hold only if the previous processing option is also populated.

Display

These processing options control whether the system displays certain types of sales order information, such as cost and price fields, closed lines and kits, and whether you can change the information.

1. Display or Hide Cost Fields Use this processing option to indicate whether the system protects or hides cost fields. Values are:

Blank: The cost fields appear on the form and the information can be overridden.

1: The system protect costs from change. If you protect the cost fields from changes, the costs are visible on the form, but cannot be changed.

2: The system hides the cost fields. If you hide the cost fields, the cost fields do not appear on the form. However, the system still writes cost information from the Item Cost Ledger (F4105) to the Sales Order Detail table (F4211).

The system retrieves default cost information from the Item Cost Ledger table (F4105).

2. Display or Hide Price Fields Use this processing option to indicate whether the system protects or hides price fields. Values are:

Blank: Price fields remain visible and entry-enabled. You can override the information for this order only.

1: The system protect prices from change. The unit and extended price will be visible on the form, but you will not be able to override the information.

2: The system does not display price information. If you hide the price fields, the system still writes the price information to the Sales Order Detail table (F4211).

3. Disable Pricing Related Fields

Use this processing option to indicate whether the system disable pricing related fields that affect the calculated price. Values are:

Blank: Pricing related fields remain visible and entry-enabled.

1: The system displays pricing related fields but you can not override the information.

4. Disable or Hide Status Codes

Use this processing option to indicate whether the system protects or hides status codes. Values are:

Blank: You can override the information for this order only. If you enter status codes, they must be set up as an other allowed status code in the Order Activity Rules for the document type and line type combination. Additionally, combination of the beginning status and the next status must be a valid last status/next status combination in the Order Activity Rules table.

1: The system protects status codes from change. If you protect the status codes from being changed, the current and next status will be visible on the form, but you will not be able to override the information.

2: The system hides the status codes. If you hide the status codes, the last and next status codes do not display. The system processes orders based on the current and next status that is set up in the Order Activity Rules.

5. Hide Closed Detail Lines

During inquiry, you might choose to review active order detail lines only. Use this processing option to indicate whether the system displays active, closed, or canceled detail lines. Values are:

Blank: The system displays all order detail lines that will appear on the detail form.

1: Any line with a status of 999 will not appear on the detail form. However, the record for the line still remains in the Sales Order Detail table (F4211) or Sales Order Detail - History (F42119).

6. Hide Credit Card Information

Use this processing option to indicate whether a user can access customer credit card information. Values are:

Blank: You can access credit card information during order entry.

1: You can not access credit card information during order entry.

7. Hide Freight and Carrier Information

Use this processing option to specify whether the system displays freight and carrier information fields. You can standardize your freight and carrier information fields so that freight rate calculations are accurately calculated for the appropriate route, stop, and zone or that a preferred carrier is always responsible for delivering the item to a customer. Values are:

Blank: Freight and carrier information fields does appear on the order detail form and can be overridden.

I: Freight and carrier information fields do not appear on the order detail form. The system processes orders based on the default information that is set up in the Customer Billing Instructions or the Item Master Information.

8. Hide Commission Information

Use this processing option to indicate whether the system displays commission information. Values are:

Blank: You can review commission information and override default information that affects the current order only.

I: The system does not display commission information. Orders are processed based on the default information that is set up in Commissions Table (F42005).

9. Hide Kit Components

Use this processing option to indicate whether kit components appear on the Sales Order Detail Revisions form either after you select features and options in the kit or when you re-inquire on the order. Values are:

Blank: The system displays the parent item, as well as selected features and options, when you re-inquire on the order.

I: After you select the features and options during order entry or when you re-inquire on the order, the system displays only the parent line. However, the parent line and all component lines are written to the Sales Order Detail table (F4211).

Commitment

Use these processing options to activate availability checking and commitments to generic buckets. Based on your item availability calculations for each branch/plant, commitment calculation affects how the system calculates backorders, cancellations, and customer delivery time.

To determine how the system calculates item availability, you define the factors that subtract from or add to the available quantity of an item. Factors that subtract from an item's availability include sales orders and work orders. Factors that add to an item's availability include purchase orders that are in transit. You define the various factors on the Availability Calculations form, which you can access from Branch/Plant Revisions.

1. Activate Availability Checking

Use this processing option to indicate whether the system verifies the available quantity for requested items. Values are:

Blank: The system does not perform availability checking. You might choose this option for blanket or quote order entry.

1: The system performs availability checking. If quantity is unavailable, the system issues a warning that the quantity for this item exceeds the available quantity. The system automatically backorders or cancels any quantity that is unavailable, based on backorder information that is set up in Item Master, Item Branch/Plant, Branch/Plant Constants and Customer Billing Instructions.

2: The system performs availability checking. If quantity is unavailable, the system issues a warning that the quantity for this item exceeds the available quantity. However, the system does not backorder or cancel any quantity. The quantity remains shippable.

You can allow backorders by item, or by customer, and specify whether the backorders are allowed at a specific branch/plant. To backorder an item, you must set the option, Backorders Allowed, in Item Master, Item Branch/Plant, Branch/Plant Constants and Customer Billing Instructions. If you allow backorders, the system holds the order detail line until quantity is available. If you do not allow backorders, the system cancels the order detail line.

After the system processes an order detail line, you can review backordered, canceled, and shipped information in the appropriate fields in the order detail lines.

2. Commit to Quantity 1 or Quantity 2

Use this processing option to indicate the generic buckets to which the system commits quantities. Commonly used for orders that do not affect your item availability, you can use these buckets to anticipate demand or forecast future sales. For example, you can set up a version of Sales Order Entry (P4210) for quote orders and commit quantities to bucket, Quantity 1. For blanket orders, you can set up another version of Sales Order Entry (P4210)

and commit quantities to bucket, Quantity 2. You can review availability information on the Summary Availability form. Values are:

Blank: The system commits the quantity based on the factors that you define for sales orders in the Availability Calculations form in the Branch/Plant Constants.

1: The system commits quantities to bucket Quantity 1

2: The system commits quantities to bucket Quantity 2

You determine how the system calculates item availability by defining the factors that subtract from the available quantities (such as sales or work orders), add to the available quantities (such as purchase orders that are in transit), or do not affect available quantities (such as blanket and quote orders) in Branch/Plant Constants.

If the system neither adds nor subtracts quantities from these orders from available inventory, clear the Sales Order Entry (P4210), Commitment tab, Activate Availability Checking processing option so that the system does not perform availability checking.

3. Display Supply and Demand Inquiry Form

Use this processing option to indicate whether the system automatically displays the Supply/Demand Inquiry form when quantity for an item is not available. Values are:

Blank: The system does not display the Supply and Demand Inquiry form and backorders or cancels the order detail line when quantity is not available. However, you can manually access this information from the Sales Order Detail Revisions form to monitor information about how many items are on demand, available in supply, and available to be promised.

1: The system automatically displays the Supply and Demand Inquiry form when quantity is not available. The system uses the version of the Supply and Demand Inquiry form that you enter in the corresponding processing option on the Versions tab.

Currency

These processing options allow you to specify information about the tolerance percentage, currency code for As If amounts, and the As Of date for processing the exchange rate for As If amounts.

1. Tolerance Limit

Use this processing option to enter a tolerance limit for multicurrency orders. If you enter an option in Set Daily Transaction Rates (F00151) to allow spot rates, you can manually enter or override an exchange rate during order entry. If the currency rate that you enter is outside this tolerance limit, the system issues a warning.

2. Currency Code	Use this processing option to indicate the currency code in which the system displays transactions.
3. As Of Date	Use this processing option to indicate the date with which the system retrieves the exchange rate for the As-If currency. If you leave this option blank, the system uses the system date.

Process

These processing options control whether the Sales Order Entry program performs as follows:

- Allows changes to orders that are past a certain point in the process
- Activates subsystem processing (note that do not use subsystem processing when you are working with the Warehouse Management system)
- Displays the Sales Order Header Revisions form before the Sales Order Detail Revisions form
- Prompts you to review order information before the system creates an order
- Allows automatic order-repricing to recalculate order totals
- Activates order template processing based on the sold to or ship to address
- Allows orders to be processed against existing agreements, blanket and quote orders
- Indicates whether the system applies the specified markup to the unit cost or price

1. Status Code Limit for Changes

Use this processing option to indicate a point at which you can not make changes to an order detail line. If you enter an order in a version of Sales Order Entry in which there is a defined status code limit, you can not re-inquire and make changes to the order if the order is past this status.

If you enter an order in a version of Sales Order Entry where there is a defined status code limit, but re-inquire on another version in which this processing option is not activated, you can make changes to the order regardless of the status.

You must specify a user defined code (00/AT) that has been set up in the Order Activity Rules based on the order type and the line type combination.

2. Subsystem Processing

Use this processing option to activate subsystem processing. Subsystem processing allows you to bypass standard system processing. For example, you can use subsystem processing if you want to print a pick slip or invoice immediately following the order entry process. Values are:

1: The system performs subsystem processing to print pick slips. On the Version tab of the P4210 processing options, you must also specify the corresponding version in the processing option for Pick Slip Print Subsystem (R42520). Note that you do not typically print pick slips when you are working with Warehouse Management.

2: The system performs subsystem processing to print invoices. On the Version tab of the P4210 processing options, you must also specify the corresponding version in the processing option for Print Invoice (P42565).

3: The system performs subsystem commitment processing and does not commit inventory until you complete the order. After you accept the order, the system processes the order through the subsystem batch program while you enter another order. Note that if you are working with Warehouse

Management, you do not typically use these processing options to commit inventory.

4: The system performs online commitment processing. The system does not process order detail lines asynchronously. After you enter the order, the system processes commitments for the complete order before you can enter another order, which allows you to review commitments online as the system processes availability for each order detail line in the order.

5: The system performs subsystem processing for entering and processing orders in store-and-forward mode. You must also identify the appropriate version of the program, Sales Order Batch Transaction Editor (R4210Z), in the P4210 processing options, Versions tab, Sales Order Batch Transaction Editor (R4210Z) processing option.

3. Display Header or Detail

Use this processing option to determine whether the system first displays the Sales Order Header Revisions form or the Sales Order Detail Revisions when you add an order. You can enter header information before detail information and edit default information that affects the order. Values are:

Blank: The system displays Sales Order Detail Revisions form first. It creates an order header record based on the branch/plant and customer information that you set up for the Sold To and Ship To address entered in the detail information form. You can access Sales Order Header Revisions to override default information, as necessary.

1: The system displays Sales Order Header Revisions form first. You review or override the default order information the system enters for the Sold To and Ship To addresses, such as billing instructions, delivery dates, and payment terms.

4. Auto Order Repricing

Use this processing option to indicate whether the system uses auto order repricing to recalculate order totals. The system evaluates the items and quantities and makes adjustment based on the entire order. Values are:

Blank: The system does not use auto-order repricing.

1: The system uses auto-order repricing to recalculate order totals.

The system uses the version of Standard Order/Basket Reprice (FUTURE) or Advanced Order/Reprice (R42750) that you specify in Sales Order Entry (P4210), on the Versions tab, the Basket/Order Reprice processing option. If you do not use the Advanced Pricing system, you must enter a version of Standard Order/Basket Reprice. If you use Advanced Pricing, you must enter a version of Advanced Order/Reprice (R42750).

5. Display Before Accept Prompt

You use this processing option to indicate whether the system prompts you to review the order before creating a record in the Sales Order Detail table (F4211). Review is a good way to ensure accuracy when you enter or change orders. Values are:

Blank: The system does not prompt you to review the order, but creates a record in the Sales Order Detail table (F4211) when you click OK.

1: The system displays the order, order total, taxes and applicable discounts for you to review the order before creating a record in the Sales Order Detail table (F4211). You can return to Sales Order Detail Revisions to make changes. The system does not create a record in the Sales Order Detail table (F4211) until you choose the option from the Form menu to accept the order.

6. Order Template Processing

Use this processing option to indicate which template the system uses during order entry. A template contains information about frequently ordered items.

You create and assign order templates to speed up the order entry process. Values are:

Blank: The system does not use order template processing.

1: The system displays the order template that you have assigned to the Sold To address in the Customer Billing Instructions.

2: The system displays the order template that you have assigned to the Ship To address in the Customer Billing Instructions.

You can set up a customer template based on order history in Customer Template Rebuild (R42815) or you can create a template for your customer in Customer Template Revisions (P4015). Assign an order template to the Sold To address and the Ship To address in the Customer Billing Instructions.

7. Blanket/Quote Order Processing

Use this processing option to indicate whether the system processes sales orders against blanket or quote orders. Use a quote order when a customer requests pricing information but is not ready to commit to a sales order. Use a blanket order when a customer agrees to purchase a quantity of an item over a specified period of time. When you use blanket or quote order processing, the system locates applicable blanket or quote orders from which you can create either multiple sales orders for partial quantities or a single sales order when you release the complete quantity. Values are:

Blank: The system does not use blankets or quote order processing.

1: The system processes blanket/quote orders based on the Ship To address.

2: The system processes blanket/quote orders based on the Sold To address.

You can have multiple blanket or quote orders for the Sold To address or the Ship To address. After you enter a detail line, the system displays a check mark in the row header and column to indicate a blanket or quote order exists.

You can view the blanket or quote order on the Blanket Release form and choose the appropriate order from which the system can create a related sales order.

8. Agreement Processing

Use this processing to indicate whether the system processes sales orders against agreements in the Agreement Management System. Values are:

Blank: The system does not use agreement processing.

1: The system searches all available agreements and automatically assigns the sales order to an agreement.

2: The system searches all available agreements, and displays a check mark in the row header and column to indicate multiple agreements exists. On the Agreement Selection Window, the system displays agreements that meet the criteria.

3: The system searches on all available agreements and automatically assigns the sales order to the agreement with the earliest expiration date.

When you enter a sales order, the system selects agreements that meet the following criteria:

- The item on the sales order and agreement must be the same.

- The Due To on the agreement must be P (partner), which indicates that product is due to the partner for this product and agreement.
- The Sold To or Ship To on the sales order must be the same as the Destination on the agreement.
- The detail branch/plant or its owner on the sales order must be the source on the agreement.
- The date on the sales order is within the active date range for the agreement.
- For agreements that have quantity control activated, the quantity on the sales order does not exceed the quantity remaining to be fulfilled before the system selects the agreement.

9. Customer Self-Service Functionality

This code indicates whether you are creating an order in standard order entry mode or Shopping Cart mode. If you choose Shopping Cart mode, you can select items from multiple applications before using Sales Order Entry (P4210) to create an order. You might use this feature if you are entering orders in a web environment. Values are:

Blank: The system does not use shopping cart functionality

1: The system uses shopping cart functionality

10. Cost or Base Price Markup

Use this processing option to indicate whether the system applies a markup based on cost or price. You use branch sales markups to set up the additional costs that are associated with an interbranch or transfer sales order. The transfer price is the amount the supplying branch/plant is selling the item to the receiving branch/plant. Values are:

Blank: The system does not apply an additional cost, but retrieves the cost defined in the Item Cost Ledger (F4105).

1: The system retrieves the markup from the Branch Sales Markup table (P3403) and re-calculates the transfer price with the included markup. This markup is applied to the inventory cost.

2: The system applies the base price that is set by the supplying branch/plant, defined in Base Price Revisions table (F4106).

11. Ship and Debit Processing

Use this processing option to specify whether the system will use subsystem or batch processing (R45100) to identify and adjust ship and debit agreements. Values are:

Blank: Do not use subsystem or batch processing

1: Use subsystem processing

2: Use batch processing

12. Issue Warning for Default Free Good

Use this processing option to generate a warning when the user selects a good that is by default the free good that is already being awarded.

13. Adjust Accumulated Values in the Volume Transaction

Use this processing option to readjust the accumulated values for credit orders in the Volume Transaction Summary business view and the Volume Transaction Detail business view (V4078B and V4079B, respectively).

14. Prompt for Customer Segment Items

Blank: Do not display Customer Segment Items

1: Display Customer Segment Items

15. Display Warning/Error for Ascending Date Rule Check*Blank:* Display warning*I:* Display error**16. Default Selection for Multiple Blanket Orders**

For future use.

Use this processing option to specify whether the system will manually or automatically release a selected blanket order if more than one blanket order is available. Values are:

Blank: The system will not release a blanket order when more than one blanket order is available. You will need to manually select and release blanket orders.

I: The system will select and release the blanket order with the earliest cancel date. If more than one blanket order has the same cancel date, the system will process releases based on the earliest requested date.

17. Default Selection for Single Blanket Orders

For future use.

Use this processing option to specify whether the system will manually or automatically release a selected blanket order if only one matching blanket order exists. Values are:

Blank: The system will release a blanket order if only one matching blanket order exists.

I: The system will not release a blanket order if only one matching blanket order exists. You will need to manually select and release blanket orders.

Cross Ref

These processing options specify the cross-reference types for substitute, replacement, complementary, and associated items. You create the cross-reference information in Item Cross Reference program (P4104). Cross-references associate your internal item numbers with other internal item numbers or those from other entities. Use this processing option to identify the code with which the system searches cross-reference information for substitute items. Substitute items are goods that are sold in place of the original item when you do not have the quantity on hand for the original item. This code is typically S in the Item Cross Reference program. You can only use substitutions for customers who, in the Customer Billing Instructions, allow substitutes.

1. Substitute Items

Use this processing option to identify the code with which the system searches cross-reference information for substitute items. Substitute items are goods which are sold in place of the original item when you do not have the quantity on hand for the original item. This code is typically S in the Item Cross Reference Revisions program (P4104). You can only use substitutions for customers who, in the Customer Billing Instructions, allow substitutes.

If you have a substitute item, the system displays a checkmark in the row header and column. Optionally, you can access Substitute/Complementary Items form to sell the substitute item in place of the original item. If you enter a quantity for the substitute item, the system creates a second order detail line with the substitute item information.

You must enter a value that has been set up in user defined code table (41/DT).

2. Complementary Items

Use this processing option to identify the code with which the system searches cross-reference information for complementary items. Complementary items are recommended items as part of the sale. Complementary items are not free

goods, but are sold in addition to the original item. This code is typically C in the Item Cross Reference Revisions program (P4104).

If you have a complementary item, the system displays a checkmark in the row header and column. Optionally, you can access Substitute/Complementary Items form to sell the complementary item with the original item. If you enter a quantity for the complementary item, the system creates a second order detail line with the complementary item information.

You must enter a value that has been set up in user defined code table (41/DT).

3. Replacement Items

Use this processing option to identify the code with which the system searches cross-reference information for replacement items. Replacement items are goods which are sold in place of the original item when you or your suppliers discontinue an item. The replacement code is typically R in Item Cross Reference Revisions program (P4104). You can only create replacement cross-references for those items whose stocking type in the Item Master or Item Branch Plant is O (obsolete) or U (use up).

You must enter a value that has been set up in user defined code table (41/DT).

4. Pricing for Substitute Items

Use this processing option to indicate which price the system retrieves when you sell substitute items. Substitute items are goods which are sold in place of the original item when you do not have the quantity available for the original item. If you substitute an item, you can charge the customer the price for the item that was originally ordered or you can use the price that you set up for the substitute item. Values are:

Blank: The system uses the price of the original item, defined in the Base Price Revisions table (F4106).

I: The system retrieves the price of the substitute item, defined in Base Price Revisions table (F4106).

5. Promotional Items

Use this processing option to specify the cross-reference type for a customer. You must enter a value that has been set up in user defined code table (41/DT).

Versions

These processing options specify the version that the system uses when you choose the associated option from the Row or Form menu on Sales Order Header or Detail forms.

Versions control how programs display information. Therefore, for a version to meet your needs, you might need to indicate specific versions in the processing options.

1. Pick Slip Print Subsystem (R42520)

Use this processing option to identify the version of Print Pick Slip program (P42520) that the system uses to process pick slips through the subsystem after order entry. Ensure that you specify the version that is set up for subsystem processing. Note that if you are using Warehouse Management, you do not typically print pick slips.

2. Supply and Demand Inquiry (P4021)

Use this processing option to identify the version of Supply and Demand Inquiry (P4021) that the system uses to verify commitments and availability.

The system calls this version whether you automatically display this form when quantity is not available or manually access Supply and Demand Inquiry from the Sales Order Detail Revisions form. If left blank, the system uses version ZJDE0001.

- To automatically display the Supply and Demand Inquiry form when quantity is not available, choose the appropriate option in the Sales Order Entry (P4210), Commitment tab, Display Supply and Demand Inquiry processing option.
- 3. Pick Slip Print On Demand (R42520) from Customer Service Inquiry**

Use this processing option to specify which version of the Print Pick Slip On Demand program (R42520) is available to you from the Customer Service Inquiry form. If you leave this processing option blank, the system uses version ZJDE0003. Note that if you are using Warehouse Management, you do not typically print pick slips.
 - 4. Adv Order/Basket Reprice (R42750)**

Use this processing to identify the version of Standard Order/Basket Reprice (FUTURE) or Advanced Order/Reprice (R42750) that the system uses to calculate order totals. If you do not use Advanced Pricing, you must enter a version of Standard Order/Basket Reprice.

If you use Advanced Pricing, you must enter a version of Advanced Order/Reprice (R42750). If left blank and you have set the Sales Order Entry (P4210), Process tab, Auto order repricing processing option to auto order reprice, the system uses version ZJDE0001.
 - 5. Online Invoice Inquiry (P42230)**

Use this processing option to identify the version of Online Invoice Inquiry program (P42230) that the system uses to display billing information. If left blank, the system uses version ZJDE0001.

If you inquire by sales order number, the system displays open lines that have not gone through sales update. If you inquire by invoice number, the system displays only those lines that have been assigned the invoice number, either through the Print Invoices (R42565) or Sales Update (R42800).
 - 6. Preference Profile (R40400)**

Use this processing option to determine which version of the Preference Profiles program (P42520) the system uses to process orders based on preferences that are activated on the Preference Selection form. If you leave this processing option blank, the system uses version ZJDE0001.
 - 7. Check Price and Availability (P41261)**

Use this processing option to identify the version of Check Price and Availability that the system uses to retrieve price adjustment information. If you do not use the Advanced Pricing system to set up price adjustments, you must enter a version of Standard Check Price and Availability (P41261). If you set up advanced price adjustments in the Advanced Pricing system, you must enter a version of Advanced Check Price and Availability (P4074).

If left blank, the system uses version ZJDE0001 of the program that is appropriate to your system.
 - 8. Purchase Order Entry (P4310)**

Use this processing option to identify the version of Purchase Order Entry (P4310) that the system uses to create related direct ship and transfer orders. The system does not use all default information that is set up in the processing options for Purchase Order Entry. For example, when the system creates the related purchase order, the sales order line type overrides the default purchase order line type.

If left blank, the system uses version ZJDE0001.
 - 9. Sales Ledger Inquiry (P42025)**

Use this processing option to identify the version of Sales Ledger Inquiry (P42025) that the system uses to create a credit order from a previous order.

The system retrieves order information from the Sales Order Detail Ledger (F42199).

If left blank, the system uses version ZJDE0001.

10. Bill of Material Inquiry (P30200)

Use this processing option to identify the version of Bill of Material Inquiry (P30200) that the system uses to retrieve information all features and options that are related to the kit. In the distribution systems, a bill of material is used to locate and assemble a group of items.

If left blank, the system uses version ZJDE0001.

11. Work Order Entry (P48013)

Use this processing option to identify the version of Work Order Entry (P4801) that the system uses to create work orders. When you enter a sales order with a line type W, the system automatically generates a work order in the Manufacturing system.

If left blank, the system uses version ZJDE0001.

12. Print Invoice (R42565)

Use this processing option to identify the subsystem version of the Print Invoice program (R42565) for printing invoices through the subsystem. You must activate the processing option in the Process tab, Subsystem Processing to print invoices and specify the version of the Print Invoice program (R42565).

13. Online/Subsystem Commitment (R42997)

Use this processing option to identify the version of the Commitments program the system uses for either online or subsystem commitments. You must activate the appropriate processing option in the Process tab, Subsystem processing for either online or subsystem commitments and specify the version of the corresponding Commitments program. Note that if you are using Warehouse Management, you do not use these processing options to commit inventory. If you leave this processing option blank, the system uses version ZJDE0001.

14. Configured Items (P32942)

Use this processing option to identify the version of Configured Items (P32942) that the system uses when you enter an order for a configured item.

If left blank, the system uses version ZJDE0001.

15. Sales Order Batch Transaction Editor (R4210Z)

Use this processing option to identify the version of Sales Order Batch Transaction Editor (R4210Z) that the system uses when you are enter sales orders in a store and forward environment.

If left blank, the system uses version ZJDE0001.

16. Credit Check (P42050)

A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.

17. Work with Shipments (P4915)

Use this processing option to specify the version of the Work with Shipments program (P4915). If you leave this option blank, the system uses ZJDE0001.

18. Customer Master (P03013)

Use this processing option to specify the version that the system uses for Customer Master Information (P03013) when you chooses Receivables from the Form menu. If you leave this option blank, the system uses ZJDE0001.

19. Ship and Debit (R45100)	Use this processing option to specify the version of subsystem or batch processing (R45100) that the system uses to identify and adjust ship and debit ageements.
20. Apply Volume Level Adjustment (R45900)	Use this processing option to specify the version of the Re-Apply Volume Level Pricing program (R45900) that the system uses.
21. Automatic Document Generation (P00391)	Use this processing option to specify the version of the Generated Document Revisions program (P00391) that the system uses during automatic document generation. If you leave this option blank, the system uses version ZJDE0001.
22. Customer Segment Items (P42440)	A value that groups customers with similar buying habits.
23. Product Variants (P41902)	A code that specifies which version of the Matrix Order Entry program (P41902) is available to you from the Sales Order application. Values are: <i>Blank:</i> The system uses version ZJDE0001. <i>Non-blank:</i> The system uses the version listed.
24. Order Processing (R31410)	Use this processing option to specify which version of Order Processing (R31410) the system uses. If you leave this option blank, the system uses version XJDE0007.
25. Product Catalog (P90CA106)	Enter the version of product catalogs (P4101H) that you would like to use.

Preference

These processing options determine whether preference profile processing is activated for this version of Sales Order Entry. A preference is a piece of information that you define for a customer, an item, or any combination of customer (sold to, ship to, or parent addresses), customer group, item, and item group. The system uses preferences to override normal customer and item setup information when you enter orders.

To work with preferences, you must set two separate processing options in Sales Order Entry (P4210). Under the Preferences tab, activate the Preference Profile Processing option. Under the Versions tab, specify the version of the Preference Processing Options application (R40400) that you have set up to select the preferences that you want to run.

1. Preference Profile Processing	Use this processing option to specify that you want to use preference profile processing. If you use preference profile processing, you must use preference profile processing in all of the versions of order entry programs. Values are: <i>Blank:</i> The system does not use preference profile processing <i>1:</i> The system uses preference profile processing After you activate the Preference Profile Processing processing option, specify the version of Preferences Selection (R40400) in Sales Order Entry (P4210), Versions tab, Preferences processing option. In that version of Preferences Selection (R40400), select the preferences in the processing options that you want to run. Preference Selection (R40400) does not include Inventory Commitment or Print Message preferences.
2. Inventory Commitment Preference	Use this processing option to specify that you want the inventory commitment preference to operate independently of other preference processing. You use inventory commitment to specify that each order line be filled from one or more branch/plants, based on the customer or customer group, or item or item

group. You can specify the branch/plants from which you want products shipped, determine the percentage of the order that must exist at a branch/plant before the quantity is filled at that branch/plant, or specify the mode of transportation and carrier information in the sales detail line. Values are:

Blank: The system does not use the inventory commitment preference.

1: Use inventory commitment preference processing only for current orders. The system performs inventory commitment preference only for those orders that are inside the commitment window of the header branch/plant. Orders that are outside the window of the header branch/plant are future committed to the header branch/plant.

2: Use inventory commitment preference processing for all orders. The system performs inventory commitment preference for all orders, regardless of the commitment window of the header branch/plant.

3. Override Schedule For Advanced Preferences

Use this processing option if you are using the Advanced Preferences function and want to specify an override preference schedule for the system to use instead of the default preference schedule that is defined in the system constants. If you are using Advanced Preferences, this schedule controls preference processing.

Note. Preference schedules can only be modified with the Advanced Preferences Schedule Revisions program (P4070) on the Advanced Preferences menu (G40311).

Transfers

These processing options determine whether transfer order processing is activated for this version of Sales Order Entry. You enter a transfer order to ship inventory between branch/plants within your company and to maintain an accurate on-hand inventory amount. When you create a transfer order, the system does the following:

- Creates a purchase order for the shipping location that represents the supplier
- Creates a sales order for the receiving location that represents the customer

1. Activate Transfer Order Entry

Use this processing option to indicate transfer order entry. When you enter transfer orders, you must enter a From Branch/Plant and a To Branch/Plant, as well as information for the related purchase order. Values are:

Blank: The system does not process transfer order information.

1: The system displays a transfer order entry form on which you enter the origination and destination branch/plants, as well as purchase order information, such as a purchase order number, landed cost rule, and exchange rates for the sales and purchase orders. The system automatically creates a purchase order based on the version that you specify in Sales Order Entry (P4210), Versions, Purchase Order Entry processing option.

2. Sales and Purchase Order Taxable

Use this processing option to indicate whether the system applies taxes to sales and purchase orders. Values are:

Blank: The system retrieves tax explanation codes and rate areas from the Customer Master Information. For direct ship, transfer orders, or sales orders with alternate Sold To and Ship To addresses, the system retrieves the tax explanation code from the Sold To address and the tax rate/area from the Ship To address, but this rate can be overridden.

1: The system does not reference the sales taxable or purchase taxable flags that you set up in the Item Branch Plant Information.

- 3. Mandatory Landed Cost** Use this processing option to indicate whether a landed cost for a related purchase order is required. Values are:

Blank: The system does not require you to enter a landed cost.

1: You must enter a landed cost before entering the order. If you do not enter a landed cost, the system issues an error.

Order Inquiry

These processing options specify how you want the system to search for orders on the Customer Service Inquiry form.

- 1. From Status** Use this processing option to indicate the current point in the order process. You must specify a user defined code (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using. The combination of the beginning status and next status must be a valid last status/next status combination in the Order Activity Rules table. During order inquiry, the system does not display orders that are not within the beginning and next status range.
- 2. To Status** Use this processing option to indicate the next step in the order process. You must specify a user defined code (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using. The combination of the beginning status and next status must be a valid last status/next status combination in the Order Activity Rules table. During order inquiry, the system does not display orders that are not within the beginning and next status range.
- 3. Search on Last or Next Status** Use this processing option to specify which status codes the system uses to choose information to display on this screen. Values are:
Blank: Display all orders with a Last status that falls within this range.
1: Display all orders with a Next status that falls within this range.
- 4. Date Range** Use this processing option to indicate the date value with which the system searches on orders. Values are:
1: The system retrieves orders based on the order entry date.
2: The system retrieves orders based on the promised ship date that is populated during order entry.
3: The system retrieves orders based on the original promised date that is populated during order entry.
4: The system retrieves orders based on the date that the order was confirmed for shipment. The system retrieves only those orders that have been processed through the Shipment Confirmation (P4205) program.
5: The system retrieves orders based on the date that the invoice was printed for the customer. The system retrieves only those orders that have been processed through the Print Invoice (R42565) program.

6: The system retrieves orders based on the date that you enter in the memo-only, cancel field during order entry.

7: The system retrieves orders based on the G/L date. The system retrieves only those orders that have been processed through the Sales Update (R42800) program.

8: The system retrieves orders based on the date that is entered as the promised deliver date during order entry.

5. Display Text Lines

Use this processing option to indicate whether the system displays text lines.

Text lines are order detail lines with a line type T, characterized by the code in the Order Line Type Revisions that contains memo-only information.

When you inquire on an order, it might or might not be necessary to view text line information. Values are:

Blank: The system does not display text lines. If you created text lines during order entry, the text lines remain in the Sales Order Detail (F4211) table.

1: The system display text lines.

6. Display Backordered/Canceled lines

Use this processing option to indicate whether the system displays backordered or canceled lines when you inquire on an order. Values are:

1: The system displays backordered lines.

2: The system displays canceled lines.

3: The system displays both backordered and canceled lines.

4: The system does not display either backordered or canceled lines.

7. Customer Cross Reference Type

Use this processing option to indicate the code with which the system searches cross-reference information using a customer item number. Cross-references associate your internal item numbers with the customer's item numbers. You set up items in Item Master Information (F4101) and create the cross-reference information in Item Cross Reference Revisions program (P4104).

You must enter a value that has been set up in UDC 41/DT.

Warehouse

The following processing options are used in conjunction with the Warehouse Management system. If you use Warehouse Management, you can specify the mode for pick request processing, and the version of the Location Selection Driver program (R46171).

1. Request Processing Mode

Use this processing option to create a pick request in the Warehouse Management system. If you use Warehouse Management, the system can generate a pick request, then process the request into suggestions through the subsystem. A pick request is used to create a suggestion to pick the inventory from a particular location for an order. Values are:

Blank: The system does not generate pick requests.

1: The system generates requests only.

2: The system generates requests and creates the pick suggestions through the subsystem

2. Subsystem Process Pick Request	Use this processing option if you want to process warehouse management pick requests into suggestions through the subsystem. You must specify the version, Picking Location Selection (R46171), that is set up for subsystem processing. If no version is specified, XJDE0007 is used.
3. Override Next Status	Use this processing option to indicate an alternative step in the order process. You must specify a user defined code (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using. The combination of the beginning status (current next status of the just created Sales Order, possibly from the Override Next Status Processing Option from the Defaults Tab) and this override status must be a valid last status/next status combination in the Order Activity Rules table.

Store & Fwd

Use the following processing option to identify the mode in which you enter orders. You can choose one of the following four modes to process orders:

- Sales order entry mode
The system performs inventory commitments, preference processing, and verifies order information against the master tables.
- Partial edit store and forward mode
The system does not perform preference processing or inventory commitments, and only performs necessary sales order processing.
- Full edit store and forward mode
The system does not perform preference processing or inventory commitments, but performs order processing.
- Price only store and forward mode
The system only processes information that is necessary for pricing.

1. Mode	Use this processing option to indicate whether you are entering orders in a store and forward environment. Values are: <i>Blank:</i> Sales order entry mode <i>1:</i> Partial edit store and forward mode <i>2:</i> Full edit store and forward mode

Workflow

Use these processing options to determine how the system processes workflow.

1. E-mail Work Order Planner	Future use.
2. Sales Order Entry Workflow	Use this processing option to activate the Sales Order Entry Approval Process (JDESOENTRY) for this version of the Sales Order Entry program (P4210). The specific version of JDESOENTRY must be activated through the Process Master program (P98800).

Multiples

Use this processing option to determine how the system processes multiple schedules.

- 1. Multiple Schedule** Future use.
- 2. Schedule Line (Future)** Future use.

Interbranch

These processing options identify the order types for interbranch orders. You can use an interbranch order to fill an order for a customer from a branch/plant other than the selling branch/plant. This is helpful if your company sells from one location but fills and ships orders from another location, such as a central supply warehouse. An intercompany order is an order that tracks the transactions between the supplying and selling branch/plant.

- 1. Intercompany Invoice** An intercompany order is an order that keeps track of the transactions between the supplying and selling branch/plant. While the interbranch order is the sales order to your customer, the intercompany order is the purchase order to the supplying branch/plant to fill the customer's sales order. Values are:

Blank: The system does not create intercompany invoice

I: The system creates intercompany invoice

- 2. Interbranch Order Types**

Use this processing option to identify the order types for interbranch orders.

Use an interbranch order to fill a sales order from a branch/plant other than the selling branch/plant. This is helpful if your company sells from one location but fills and ships orders from another location, such as a central supply warehouse.

You must enter a user defined code (00/DT) that identifies the type of document. Enter multiple codes without punctuation or spaces. To accurately update all interbranch orders, you should also enter all order types for interbranch orders in Sales Update (R42800), Interbranch tab, Order Type for Interbranch Orders processing options.

Interop

These processing options control whether the system captures transaction information prior to changes to a transaction and whether the system performs export processing.

- 1. Transaction Type** Future use.
- 2. Before/After Image Processing** Future use.

Prepayment

These processing options control whether you can record payment information for orders.

Prepayment of an order takes place when a seller receives a form of payment from the customer at the time of order entry. There are many types of prepayments that a customer can use, such as cash, check, and credit card. When you make any type of prepayment, the system records transaction information for each order detail line, and indicates the payment on the invoice.

During order entry, you can validate credit information when you accept a credit card as a means of payment. By way of your middleware solution, the system retrieves authorization and updates the prepayment transaction in the system. If the authorization is unsuccessful, then the order is put on authorization hold and the system does not allow further order processing.

When a settlement is performed, your middleware solution release funds from a customer's account to the merchant account. If the settlement transactions contain errors, the order is put on settlement hold and the system does not allow further order processing.

In order for either hold to be removed, the authorization or settlement process must be successfully run in batch mode of the appropriate prepayment transaction version.

1. Prepayment Processing	Use this processing option to determine whether to activate Prepayment Processing. Values are: <i>Blank:</i> The system does not update Prepayment Processing files and you can not access the Prepayment window from the row exit. <i>1:</i> The system does update the Prepayment Processing files and you can access the Prepayment window.
2. Process Authorization	Use this processing option to identify the method of processing. Values are: <i>1:</i> The system processes the authorization interactively. <i>2:</i> The system processes the authorization in batch or subsystem mode, based on the version. <i>Blank:</i> The system does not process the authorization.
3. Process Settlement	Use this processing option to identify the settlement processing method. Values are: <i>1:</i> The system processes the settlement interactively. <i>2:</i> The system processes the settlement in batch or subsystem mode, based on the version. <i>Blank:</i> The system does not process the settlement.
4. Authorize Prepayment Transaction version	Use this processing option to identify the version of Authorize Prepayment Transaction.
5. Settle Prepayment Transaction version	Use this processing option to identify the version of Settle Prepayment Transaction.
Enter a Next Status Override Code for:	Use this processing option to identify the override Next Status Code for order lines that have been successfully authorized during the credit card process.
6. Authorized lines	Use this processing option to identify the version of Authorize lines Transaction.
7. Settled lines	Use this processing option to identify the Settled lines Transaction.

Audit Log

These processing options determine whether the system creates an audit log for changes that you make to sales orders and how the system processes the changes.

1. Use Audit Log for Sales Order Changes	Use this processing option to specify whether to activate the audit logging process for sales order changes. Values are: <i>Blank:</i> Do not activate audit logging. <i>1:</i> Activate audit logging.

Note. You can override this processing option by using the Bypass Audit Logging field defined in the customer billing Instruction. For example, if you set this processing option to a 1, but the customer specified in the sales order had Bypass Audit Logging set, then the system performs no audit logging for that order or any order for which that customer is specified.

2. Reason Code required for Sales Order Changes

Use this processing option to specify whether a revision reason code is required for sales order changes. Values are:

Blank: Do not require a revision reason code.

1: Require a revision reason code.

3. Approval process required for Sales Order changes

Use this processing option to specify whether the approval process is required on the changes made to the sales order. The Use Audit Log for Sales Order Changes processing option on the Audit Log tab must be set to 1 to enable the approval process. However, you can enable audit logging without setting the Approval Process Required for Sales Order Changes processing option. When approval process is required, the system does not record changes to the order. Instead, the system retains the original values and places the order on hold. The new values are pending in the Audit Log table until an approval or rejection decision has been made. The new values are recorded for the order only if the order is approved. Values are:

Blank: The approval process is not required.

1: The approval process is required.

Volume Upsell

This processing option determines whether you receive an alert based on the tolerance percentage that you specify.

1. Alert for Volume Based Up-Sell within Tolerance

Use this processing option to enter a percentage of tolerance in order for the system to suggest an upsell. This percentage is based on the increase in quantity that the customer would have to order to meet the next level-break.

Profit Margin

These processing options determine the following:

- Whether the system performs gross profit margin pricing
- Which adjustment reason code to use for overrides to pricing information
- Whether to resolve and test the gross profit percentage

1. Enable Gross Profit Margin Pricing

Use this processing option to enable the % Profit Margin column. Enabling this column allows you to enter the gross profit margin percentage.

2. Adjustment Reason Code for Overrides

Use this processing option to identify the Adjustment Reason Code for Overrides.

3. Resolve and Test Target Gross Profit Percentage

Use this processing option to generate a warning if the gross profit margin percentage is outside of the range that you specified in the Target Gross Profit Preference processing option. Also, if the gross profit margin percentage is not within the defined margins, and the Line Level Margin Hold Code

processing option is set, the system places the order on hold using the line level margin hold code that you specified in the processing option.

Promotion ID

This processing option determines whether the system assigns a promotion identification number.

1. Default Promotion ID

Use this processing option to specify whether the system assigns a promotion ID number to a sales order line item to which a promotion ID number has not been manually assigned. Values are:

Blank: Do not assign a promotion ID.

1: Assign a promotion ID.

Note. If you set this option to 1, the system assigns a promotion ID from the Promotion Deal Detail File table (F40P011). If the system locates multiple promotion IDs, it assigns a promotion ID based on the value from the Promotion ID Resolution Constant in the Distribution/Manufacturing Constants table (F4009). The system might require more processing time to assign this ID automatically.

Order Promising

This processing option controls whether the system enables the order promising process and determines the mode of processing.

1. Order Promising

Use this processing option to specify the mode of order promising that the system uses to promise a delivery date for an order. Values are:

Blank: Do not use order promising.

1: Use the auto promising mode of order promising.

2: Use auto promising and scenario manager modes of order promising.

Matrix

This processing option controls the system displays the matrix window during the matrix order entry process.

1. Inventory Parent

Blank: Enable Matrix Window

1: Disable Matrix Window

Creating Sales Order Pick Requests by Batch

To create pick requests by batch, select Outbound Warehousing Operations (G4612), Batch Picking Requests.

Creating Bulk Pick Requests

To create bulk pick requests, select Outbound Warehousing Operations (G4612), Create Bulk Pick Requests.

Locating Existing Pick Requests

Access the Picking Requests Inquiry form.

Locating Existing Bulk Pick Requests

Access the Work With Bulk Request form.

See Also

Confirming Pick Suggestions in the Warehouse Management Guide for more information about overriding shipping locations and processing bulk pick requests

Setting Up Preferences in the Sales Order Management Guide for information about the preference profile for multiple shipping and receiving locations

Working with Pick Suggestions

This section provides an overview of pick suggestions, lists prerequisites, and discusses how to:

- Create pick suggestions by batch.
- Create pick suggestions interactively.
- Create alternate pick suggestions.
- Confirm pick suggestions interactively.
- Confirm pick suggestions by batch.
- Confirm bulk pick suggestions.
- Override pick suggestions.
- Override shipping locations.
- Create tasks and trips.
- Create the summary document.
- Create move tags.
- Confirm shipment.
- Set processing options for Shipment Confirmation (P4205).

Understanding Pick Suggestions

After you create pick requests, you create pick suggestions to move items from storage locations to the shipping location . You can create pick suggestions by batch using the appropriate version of the Location Selection Driver program (R46171) that you have created. Also, you can create alternate pick suggestions by creating your own versions of the Location Selection Driver program to replace existing suggestions with which you do not agree.

Batch Method

You normally create pick suggestions by batch to process pick requests on a regular basis. You can compensate for a large volume of sales orders by creating pick suggestions several times each day. You can also compensate for a large volume by running the Picking Location Selection program in Subsystem Parallel Processing. You typically run batch programs during off-peak hours when more system resources are available.

While processing pick suggestions, the system excludes all locations that do not have adequate available or inbound inventory. Note that if you are working with license plate functionality, the system does not consider inbound quantities in the branch/plant.

Interactive Method

You can create suggestions interactively to select locations for picking. You can either allow the system to suggest a location or manually specify picking information such as the quantity, the unit of measure, and the location.

If you want the system to suggest locations automatically when you access the Manual Planner form, you must set the appropriate processing option on the Manual Planner tab for the Request Inquiry program (P4600).

When you run the Location Selection Driver program (R46171), the system can:

- Select all outstanding pick requests based on data selection
- Update each request's status in the Warehouse Requests table (F4600)
- Create picking location movement suggestions
- Print audit reports

You control which functions that the system performs by setting processing options in the Location Selection Driver program.

If you are using automatic replenishment, as you create suggestions for picking locations, the system runs the appropriate programs to create and process replenishment requests for depleted picking locations.

Alternate Pick Suggestions

You can create alternate pick suggestions if you do not agree with the system's suggestions for picking locations. You create alternate suggestions by running a version (with the correct processing option settings) of the Location Selection Driver program (R46171) for resuggestions. Specify the option for resuggestions in the processing options for the Location Selection Driver program.

Creating alternate suggestions replaces any previous location suggestions. With alternate suggestions, you can access new inventory locations that you might have added since you created the first suggestions or new inventory that has become available in existing locations.

If you have not changed inventory locations in your warehouse, or the inventory levels have not changed and you want to create suggestions for locations that differ from previous suggested locations, you must change the picking instructions table or other setup information, such as Process Selection, Fixed Locations, Max or Min quantities/percentages, and so on. For example, you could change the picking instructions table to choose a new pick zone or to use a different tiebreaker rule to choose locations. If you do not change the picking instructions, the Location Selection Driver program suggests the same locations as in the previous suggestions.

When you run the Location Selection Driver program for resuggestions, the system can:

- Delete existing pick suggestions for the request and resets the commitments caused by/related to the original suggestions in the F41021 and F4602/F46L12.
- Reset each request's status in the Warehouse Requests table (F4600)
- Create alternate picking location suggestions
- Print audit reports

You control which functions the system performs by setting processing options in the Location Selection Driver program. For Manual Planner and batch Suggestion, the system picks the License Plates LPN first, then Loose items and lastly, Items of an LPN.

Pick Suggestion Confirmation

If you agree with the system's suggestions for picking locations, you confirm them interactively or by batch. If you do not agree, you can override the suggestions and specify a location of your choice, or you can cancel the existing suggestions and stop further processing.

You need to confirm the following two types of suggestions:

- Suggestions for picking, packing, and shipping items
- Suggestions for picking, packing, and shipping cartons

When you confirm suggestions for picking, you:

- Reduce on-hand inventory in the picking location
- Relieve the commitment of inventory in the picking location
- Increase on-hand inventory in the shipping location
- Commit inventory to the shipping location

Pick confirmation ensures that the system's records match actual inventory movements by creating/updating the following:

- Item Location File (F41021)
- Location Detail Information (F4602) if you have not activated license plates for the branch/plant.
- Item Ledger File (F4111)
- Warehouse Requests (F4600)
- Warehouse Suggestions (F4611)
- Warehouse Task Header (F4601)
- Sales Order Detail File (F4211) for sales order picking
- S.O. Detail Ledger File (F42199) for sales order picking
- WO Parts List File (F3111) for work order picking
- License Plate Master File (F46L10) if license plate functionality is activated for the branch/plant
- License Plate Item Detail File (F46L11) if license plate functionality is activated for the branch/plant
- License Plate Item Commitments File (F46L12) if license plate functionality is activated for the branch/plant
- License Plate History File (F46L99) if license plate functionality is activated for the branch/plant
- Carton Detail File (F4620) if pick/pack/ship functionality is activated and you are picking sales orders
- Transportation Pieces File (F4943) if pick/pack/ship functionality is activated and you are picking sales orders
- Pack Confirm File (F4216)
- Location Capacity (F46L30) if pick/pack/ship functionality is activated and you are picking sales orders

When you are working with pick suggestions for cartons, you can set the appropriate processing option for the system to generate or update the Carton Detail Information table (F4620). The Carton Detail Information table contains detailed information about the contents of a carton and can be generated when you perform pick confirmation for a task (a task is a group of suggestions). After you have generated the Carton Detail Information table and continue to confirm tasks, the system updates the table to contain the most current carton detail information.

Before you confirm the pick suggestions for cartons, you also can specify the version of the Carton Reorganization program (P4620) that you want to use.

For bulk pick suggestions, you can review the sales order detail lines in the bulk pick suggestion during the confirmation process before you actually confirm the bulk pick suggestion. After you confirm the bulk pick suggestion, you can run Bulk Pick Detail Report (R46210), which lists each sales order detail line from the bulk pick suggestion that you confirmed. Typically, you use the information to assist you in filling each sales order.

Batch Confirmation

You can confirm pick suggestions by batch when you run the Batch Confirmations program (R4617). However, before you confirm pick suggestions by batch, you should review and override suggestions as necessary because after you confirm suggestions, you cannot reverse the confirmations.

The system automatically confirms suggestions if there are no errors during the confirmation process and prints all the suggestions that were not confirmed. If you set the appropriate processing option, the system prints the corresponding description of the error on the report after processing all suggestions.

Shipping Locations

If you have set up your warehouse to accommodate multiple shipping locations and have set the appropriate processing option in the Warehouse Movement Confirmations program (P4617) to allow shipping locations to be overridden, you can override shipping locations that the system has suggested. You also can override the shipping location for a single suggestion by choosing the appropriate exit (Override To Location) from the Row menu on Work With Warehouse Confirmations. You also can override the shipping location for the entire request, shipment, load, and so on by choosing the appropriate exit from the Row menu. When you override the shipping location, the change occurs immediately in the system even if you cancel the change on the Movement Confirmation form.

Technical Considerations for Choosing a Selection Option

When you override a shipping location, the system can update the appropriate tables with the new location. On the Override Shipping Location form, the following options, which represent selection criteria, allow you to choose which tables that the system updates with the new location. You choose the appropriate selection criteria based on the system and program from which you access the Override Shipping Location form.

Option	Usage
Shipment Number	When you choose this option, the system uses the shipment number contained in the Shipment Routing Steps table (F4941) for data selection. The system also updates location information contained in the Shipment Routing Steps table (F4941), the Warehouse Requests table (F4600), and the Warehouse Suggestions table (F4611). If you accessed the Override Shipping Location form from the Transportation Management system's Work With Shipments program (P4915) or Work With Loads program (P4960) and choose this option, the system updates the routing step with the new location.

Option	Usage
Load Number	When you choose this option, the system uses the load number contained in the Shipment Routing Steps table (F4941) for data selection. The system also updates location information contained in the Shipment Routing Steps table (F4941), the Warehouse Requests table (F4600), and the Warehouse Suggestions table (F4611). For the Transportation Management system's Work With Shipments program (P4915) and Work With Loads program (P4960), the system updates the routing step with the new location.
Carrier Number	If you accessed the Override Shipping Location form from the Transportation Management system's Work With Shipments program (P4915) or Work With Loads program (P4960) and choose this option, the system uses the ship to address contained in the Shipment Routing Steps table (F4941) for data selection and updates the location information in the Shipment Routing Steps table (F4941), the Warehouse Requests table (F4600), and the Warehouse Suggestions table (F4611). If you accessed the Override Locations form from the Warehouse Management system's Request Inquiry program (P4600) and choose this option, the system uses the ship to address that is contained in the Warehouse Requests table (F4600) for data selection. The system updates location information in the Warehouse Requests table (F4600) and the Warehouse Suggestions table (F4611). If you accessed the Override Shipping Location form from the Warehouse Management system's Warehouse Movement Confirmations program (P4617) and choose this option, the system uses the ship to address that is contained in the Warehouse Suggestions table (F4611) and updates location information only in that table.
Original Location	If you accessed the Override Shipping Location form from the Transportation Management system's Work With Shipments program (P4915) or Work With Loads program (P4960) and choose this option, the system uses the original location that is contained in the Shipment Routing Steps table (F4941) for data selection and updates the location information in the Shipment Routing Steps table (F4941), Warehouse Requests table (F4600), and Warehouse Suggestions table (F4611). If you accessed the Override Locations form from the Warehouse Management system's Request Inquiry program (P4600) and choose this option, the system uses the original location that is contained in the Warehouse Requests table (F4600) for data selection. The system updates location information in the Warehouse Requests table (F4600) and the Warehouse Suggestions table (F4611). If you accessed the Override Shipping Location form from the Warehouse Management system's Warehouse Movement Confirmations program (P4617) and choose this option, the system uses the original location that is contained in the Warehouse Suggestions table (F4611) and updates location information only in that table.

Option	Usage
Ship To Address	If you accessed the Override Shipping Location form from the Transportation Management system's Work With Shipments program (P4915) or Work With Loads program (P4960) and choose this option, the system uses the carrier number that is contained in the Shipment Header table (F4215) for data selection. The system updates location information that is contained in the Shipment Header table (F4215), Warehouse Requests table (F4600), and Warehouse Suggestions table (F4611). If you accessed the Override Shipping Location form from the Warehouse Management system's Request Inquiry program (P4600) and choose this option, the system uses the carrier number that is contained in the Warehouse Requests table (F4600) for data selection. The system updates location information in the Warehouse Requests table (F4600) and the Warehouse Suggestions table (F4611). If you accessed the Override Shipping Location form from the Warehouse Management system's Warehouse Movement Confirmations program (P4617) and choose this option, the system uses the carrier number that is contained in the Warehouse Suggestions table (F4611) and updates location information only in that table.
Requests Number	If you accessed the Override Locations form from the Warehouse Management system's Request Inquiry program (P4600) and choose this option, the system uses the requests number that is contained in the Warehouse Requests table (F4600) for data selection. The system updates location information in the Warehouse Requests table (F4600) and the Warehouse Suggestions table (F4611).
Suggestion Number	If you accessed the Override Shipping Location form from the Warehouse Management system's Warehouse Movement Confirmations program (P4617) and choose this option, the system uses the suggestion number that is contained in the Warehouse Suggestions table (F4611) and updates location information only in that table.
Task Number	If you accessed the Override Shipping Location form from the Warehouse Management system's Warehouse Movement Confirmations program (P4617) and choose this option, the system uses the task number that is contained in the Warehouse Suggestions table (F4611) and updates location information only in that table.

The only exception to the functionality described above is when you have created bulk pick requests. To create a bulk pick request, you consolidate all pick requests into one bulk pick request so that the personnel who perform the picking can pick items for many sales orders at once rather than having to make multiple trips. Therefore, you cannot override the To location information for a bulk pick request unless the locations are the same. You also cannot override the location for the orders, shipments, and loads in a bulk pick request unless the corresponding sets of information are the same. Finally, you cannot override the location for a bulk pick request or a regular request with a status equal to or greater than 255 (Bulk Request in Confirmation). However, you can override the location by creating a new suggestion.

Task and Trip Assignment and Move Documents

After you have created suggestions for putaway, picking, or replenishment, you can create task and trip assignments (if you have not already done so when creating suggestions) and customized move documents to help your warehouse personnel move inventory efficiently through your warehouse.

The system can assign task and trip numbers to suggestions when you create and process suggestions. A task is a group of suggestions, and a trip is each suggestion in the task.

When you run the Task and Trip Creation program (R46471), it is important to activate data sequencing so that you can verify the information that the system uses to assign task and trip numbers. Data sequencing is also useful for determining how to separate the tasks for the selected suggestion.

When you run the Task and Trip Creation program, you can specify the following information:

- Maximum quantity information, such as the maximum number of tasks and trips (by leaving the default value of blank or zero, you can specify an unlimited number of tasks and trips)
- Whether you want the system to print the supporting documents (R46472) with the task and trip assignments
- Whether you want the system to recommend cartons during picking
- Whether the system generates the Carton Detail Information table (F4620), which contains detailed information about the contents of each carton
- Which version of the Carton Reorganization program (P4620) the system uses

After you run the Task and Trip Creation program, you can print a summary document to review task and trip assignments.

Summary Document

Use the Move Slips program (R46472) to print a summary document that contains information for all the suggestions that you created. The summary document is also referred to as a move slip. This report page breaks by the task number. The summary document includes information such as:

- Trip numbers
- To and From locations
- Item numbers and descriptions
- Quantity information
- Unit of measure information
- Carton recommendation information

After you create and review the summary document, you can print move tags that enable warehouse personnel to plan the movement of inventory throughout the warehouse.

Move Tags

When you run the Move Tags program (R46473), the system creates move tags for the suggested location during putaway, picking, and replenishment. A move tag contains information such as:

- The item that warehouse personnel are moving
- The item unit of measure
- To and From locations

You can print tags for each trip or for each unit of measure moved on the trip, depending on your definition of the item on Item Unit of Measure Definition Revisions. You can scan the move tags to facilitate movements, storage, confirmation, and other downstream material handling and counting operations.

Examples of other Warehouse Management programs from which you can automatically print move tags (by setting processing options or by choosing row exits or form exits) are:

- Batch Putaway Reservations (R461301)
- Location Selection Driver (R46171)
- Move Slips (R46472)
- Warehouse Movement Confirmations (P4617)

Shipment Confirmation

After you finish processing a pick suggestion, you must indicate that the items have left the warehouse for shipment to the customer.

Important! You must actually ship the item and relieve the inventory when you confirm shipment to avoid balance discrepancies between system inventory records.

You must list the sales order document type (for example, SO) in the user defined codes table 40/IU to permit the system to update the inventory records when you confirm shipment. The system then ensures that records match actual inventory movements by updating the following tables:

- Item Location File (F41021)
- Location Detail Information (F4602)

Before you confirm shipment for a carton, you have the option of reorganizing its contents and its placement within a shipment prior to shipping. The Carton Reorganization program (P4620) not only allows you to reorganize a carton's contents, but also allows you to create and organize new cartons.

You can use the Shipment Confirmation Carton Status and the Reconcile Carton Detail to Shipment Detail processing options on the Carton Detail tab to ensure that cartons have passed the necessary edits before you confirm shipment. For example, after all the labels have been assigned to the shipment, you can change the carton status to indicate that carton detail has been reconciled to shipment detail. If all cartons for the shipment are not at that status, the system cannot confirm the shipment. This process is optional, because you can leave the status blank to proceed without checking the carton status.

You can also perform this function using the batch version of Shipment Confirmation. The batch version (R42500) retrieves the processing options of the interactive version specified in its processing options.

Prerequisites

Before you complete the tasks in this section:

- Verify that you have set up order groups and process groups for your stock items.
- Verify that you have set up picking instruction tables to designate specific locations based on the items' order and process groups.

Forms Used to Work with Pick Suggestions

Form Name	Form ID	Navigation	Usage
Manual Picking Location Planner	W4600B	Outbound Warehousing Operations (G4612), Pick Requests On the Picking Requests Inquiry form, select a record and select Manual Planner from the Row menu or the Select Button.	Create pick suggestions interactively. To allow the system to create a suggestion, select a record and click Select. If you have already set the processing option on the Manual Planner tab to automatically suggest locations, you do not need to select the row to create suggestions. To manually create a suggestion, select a record, and enter the appropriate quantity, unit of measure, and location.
Process Transactions	W4617	Outbound Warehousing Operations (G4612), Pick Confirmation On the Work With Warehouse Confirmations form, select a record and select Confirm from the Row menu. Click Process.	Confirm pick suggestions interactively.
Bulk Pick Detail	W4617D	On the Work With Warehouse Confirmations form, select a record and select Bulk Pick Detail from the Row menu.	View bulk pick requests. You can review each pick request in the bulk pick request during the confirmation process before you actually confirm the bulk pick suggestion. Complete the Priority field to indicate the order in which you want the system to process each pick request. After you have confirmed the bulk pick suggestions, you can print the Bulk Pick Detail Report (R46210), which displays deconsolidated information for the bulk suggestion.

Page Name	Object Name	Navigation	Usage
Override Suggestion	W4617C	On the Work With Warehouse Confirmations form, select a record and select Override from the Row menu.	Override pick suggestions. You can override a pick suggestion and specify a location of your choice, you can split a pick suggestion into two locations, you can override the qty, you can overpick, pick with variance, and so forth. You also can cancel the existing suggestions and stop further processing.
Override Shipping Location	W460501A	On the Work With Warehouse Confirmations form, select a record and select Override All To Loc from the Form menu.	Override the shipping location for multiple suggestions.
Shipment Confirmation	W4205K	Sales Order Processing (G4211), Confirm Shipments Outbound Warehousing Operations (G4612), Ship Confirmation On the Work with Shipment Confirmation form, select a record and click Select.	Confirm shipment.

Creating Pick Suggestions Interactively

Access the Manual Picking Location Planner form.

Creating Pick Suggestions by Batch

To create pick suggestion by batch, select Outbound Warehousing Operations (G4612), Process Pick Requests.

Creating Alternate Pick Suggestions

To create alternate pick suggestions, select Outbound Warehousing Operations (G4612), Process Pick Requests.

Confirming Pick Suggestions Interactively

Access the Movement Confirmation form.

Confirming Pick Suggestions by Batch

To confirm pick suggestions by batch, select Outbound Warehousing Operations (G4612), Batch Picking Confirmations.

Reviewing Bulk Pick Suggestions

Access the Bulk Pick Detail form.

Pick Confirmation - Bulk Pick Detail

OK Cancel Form Tools

Branch/Plant 40

Bulk Req Batch Num 79

Bulk Req Seq Num 1.000

Item Number 2200
Tire Pump

Total Quantity 60

U/M EA

Records 1 - 4 Customize Grid

	Priority	Quantity	UM	Order No	Or Ty	Doc Co	Line No	Total Qty	Available Qty	Processed Qty
☒	99999999	10	EA	2596	SO	00001	1.000	10	10	0
☐	99999999	20	EA	2597	SO	00001	1.000	20	20	0
☐	99999999	30	EA	2598	SO	00001	1.000	30	30	0
☐										

Bulk Pick Detail form

Overriding Pick Suggestions

Access the Override Suggestion form.

See Also

If you need to specify location information for many suggestions at once, see [Overriding Shipping Locations in the Warehouse Management Guide](#)

Overriding Shipping Locations

Access the Override Shipping Location form.

Creating Tasks and Trips

To create tasks and trips, select Warehouse Move Documents (G4621), Create Tasks and Trip.

Creating the Summary Document

Before you create the summary document, verify that the system has created suggestions.

To create the summary document, select Warehouse Move Documents (G4621), Summary Document.

Creating Move Tags

Before you create move tags, verify that the system has created suggestions.

To create move tags, select Warehouse Move Documents (G4621), Move Tags.

Confirming Shipment

Access the Shipment Confirmation form.

Confirm Shipments - Shipment Confirmation

OK Cancel Form Row Tools

Order Number 2401 SO 00200 Branch/Plant *

Pick Slip Number *

Shipment Number

Customer PO *

Records 1 - 1

	Sel = 1	Quantity Shipped	Unit of Measure	Secondary Qty Shipped	Secondary UoM	Item Number	Location
☐	☐	134	EA	134	EA	220	.

Shipment Confirmation form

To confirm shipments:

- On Shipment Confirmation, revise the following information as necessary, and then click OK:
 - Quantity Shipped
 - Location
 - Lot/Serial
 - Quantity Backordered
 - Quantity Canceled
 - Carrier Number
 - Actual Ship Date
- On Work with Shipment Confirmation, do either of the following:
 - To confirm all order detail lines that the system displays according to your search criteria, choose Confirm Shown Rows from the Form menu.
 - To confirm an order detail line, choose the row and then choose Confirm Line from the Row menu.
- On Shipment Confirmation, to select order detail lines for confirmation, complete the Sel = 1 field.
If you have activated the processing option to automatically select order detail lines, the system automatically selects all detail lines for confirmation.
- To change the line default information, choose Line Defaults from the Form menu.
- On Shipment Confirmation Line Defaults, complete the following fields and click OK.
 - Container I.D
 - Carrier Number
 - Actual Ship Date
 - Actual Ship Time
- On Shipment Confirmation, to choose alternative locations or assign serial numbers, choose the row and then choose Select Location from the Row menu.
- On Select Multiple Locations, complete the following fields and click OK:

- Location
 - Lot / Serial
8. On Shipment Confirmation, click OK to confirm the selected order detail lines.
Based on the processing option selection, the system might display Additional Line Items.
 9. On Additional Line Items, you can enter additional non-inventory lines and click OK.
Depending on your processing option selection, the system might display the Pack Confirm Detail Revisions form.

See Also

Working with Standard Pack Carton Recommendations in the Warehouse Management Guide

Reorganizing Cartons and Items in a Shipment in the Warehouse Management Guide for more information about the Carton Reorganization application (P4620)

Setting Processing Options for Shipment Confirmation (P4205)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Selection

These processing options specify the criteria that the system uses to select order detail lines for confirmation.

1. Next Status From (Required)	Use this processing option to indicate the current point in the process of the line. You must use a status that has been set up in user defined codes table (40/AT) of the order activity rules based on the order type and the line type that you are using. The combination of Status From and Status Thru must be a valid last status/next status combination in the Order Activity Rule table.
2. Next Status Thru (Required)	Use this status to indicate the next step or an alternate step in the order process. You must enter a user defined code table (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using. The combination of the Status From and the Status Thru must be a valid last status/next status combination in the Order Activity Rules.
3. Sales Order Type (Required)	Use this processing option to specify the type of document. This code also indicates the origin of the transaction. Certain document type codes are reserved for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.) You must enter a value that has been set up in UDC 00/DT. To relieve the on-hand quantity for an item during shipment confirmation, you must also add order types to UDC 40/IU. If you do not enter the order

types to the user defined code table, the system automatically relieves on-hand quantity for an item at sales update.

If you do add order types to UDC 40/IU, the system automatically subtracts the on-hand quantity from inventory during shipment confirmation. The system creates a record in the Cardex with the sales order as the document number and the order type as the document type. During sales update, the system adds the invoice number, invoice type, G/L date, and batch number to the existing record.

If you do not add order types to UDC 40/IU, the system subtracts the on-hand quantity from inventory during sales update and writes the invoice number, type, and G/L date to the Cardex. No record is written during shipment confirmation.

Defaults

These processing options specify default values, such as the document type, that the Shipment Confirmation program (P4205) uses when other values are not entered for the transaction.

1. Line Type for New Sales Detail Lines

Use this processing option to specify a code that controls how the system processes lines on a transaction. Line types affect the systems with which the transaction interfaces (General Ledger, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management). It also specifies the conditions for including a line on reports and in calculations. Values are defined in the Line Type Constants Revisions form (P40205) and include:

S: Stock item

D: Direct ship item

J: Job cost

N: Non-stock item

F: Freight

T: Text information

M: Miscellaneous charges and credits

W: Work order

Although you cannot add inventory items to a sales order during shipment confirmation, you can add amounts for non-stock items, such as handling charges and freight.

If you enter a non-inventory line type for new sales detail lines and set the processing option, Allow Additional Line Entry, the system will display the Additional Line Entry window after you confirm sales order detail lines.

2. Enter a Next Status Override Code for:

Confirmed Sales Detail Lines

Use this status to indicate an alternate step in the order process. You must enter a user defined code (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using. The combination of status codes specified in the processing options for the Status From and the Override Code for Sales Detail Lines must be a valid last status/next status combination in the Order Activity Rules.

Additional Non-inventory Line Items Entered

Although you cannot add inventory items to a sales order during shipment confirmation, you can add amounts for non-stock items, such as handling charges and freight. Use this processing option to indicate an alternate step in the order process when you add non-inventory items at the time of Shipment Confirmation. You must enter a user defined code (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using. The combination of status codes specified in the processing options for the Status From and the Override Code for Additional Non-Inventory Lines must be a valid last status/next status combination in the Order Activity Rules.

You can only use this processing option if you have activated the processing option, Allow Additional Line Entry.

Remaining Backordered Quantities

Use this processing option to indicate an alternate step in the order process for quantities that are unavailable at the time of Shipment Confirmation. On a confirmed order, the original order detail line indicates the quantity that was confirmed for shipment. If the available quantity is less than the ordered quantity, the system adds an order detail line to indicate the quantity that remains unshipped. The current status code for the new detail line is 904 (Backordered at Shipment Confirmation). The next status code can default from the order process or you can indicate an alternate status.

You must enter a user defined code (40/AT) that has been set up in the Order Activity Rules based on the order type and the line type that you are using.

The combination of status codes specified in the processing options for the Status From and the Override Code for Backordered/Canceled Quantities must be a valid last status/next status combination in the Order Activity Rules.

You can only use this processing option if you have activated the processing option, Backorder or Cancel Unshipped Quantity.

Authorized Lines

Enter an override status code for authorized lines. If you enter a status code, you must use a status that has been set up in the user defined code table (40/AT) of the order activity rules based on the order type and line type combination.

Settled Lines

Use this processing option to enter an override status code for settled lines.

If you enter a status code, you must use a status that has been set up in the user defined code table (40/AT) of the order activity rules based on the order type and line type combination.

Display

These processing options specify whether the system displays certain types of sales order information or allows you to enter additional lines during confirmation.

1. Allow Additional Line Entry

Use this processing option to indicate whether you can add non-inventory items to a sales order during shipment confirmation. For example, you can add amounts for non-stock items, such as handling charges and freight. Values are:

Blank: Do not display Additional Line Entry form.

I: Display the Additional Line Entry form after sales order detail lines are confirmed.

This processing option works with the processing option for the default line type for new sales detail lines. If you enter a non-inventory line type for new sales detail lines, the system displays the line type in the form.

2. Display Kit Component Lines

Use this processing option to choose whether to display component lines for kits. When you confirm the shipment of a kit, you can manually confirm the individual components of the kit or have the system confirm the components when you confirm the parent item. Values are:

Blank: The system does not display kit component lines, but automatically confirms each component and balances the remaining quantity for each item in the kit. If quantity is not available for a component, the system backorders or cancels the entire kit.

I: The system displays all kit component lines and you must manually confirm each component. If a quantity is not available for an optional component, the system backorders or cancels the component, but not the parent item.

3. Display Text Lines

Use this processing option to indicate whether the system displays text lines when you confirm the shipment of an order. Order detail lines with a text line type, typically T, contain memo information.

When you confirm the shipment of an order, it might be necessary to view text line information. Values are:

Blank: The system does not display text lines.

I: The system displays text lines.

4. Item Location Hold Error

Use this processing option to indicate whether you receive an error when an item location is on hold. You can set up lot status codes and assign status codes to locations in the Item Master, Item Branch Plant, Lot Master Revisions. An approved lot or location does not have a status code. If you do not assign a status code to a location or lot, it is an approved lot or location. All other codes indicate a hold. The system might process items out of locations that appear on hold. Values are:

Blank: The system does not indicate an error when the item location is on hold.

I: The system does not confirm the shipment of items from this location until the lot status is approved.

5. Pre-select Detail Lines for Confirmation

Use this processing option to indicate whether the system enters the selection value in the revisions form. You might choose the option to pre-select detail lines if you display kit component lines, or sub-assemblies. Values are:

Blank: The system does not automatically select the detail lines for confirmation. You must enter the selection value to confirm a detail line.

I: The system enters the selection value, a 1, for all order detail lines in the Revisions form. You can then de-select any lines that you do not to confirm for shipment.

Edits

These processing options specify whether the system verifies availability before confirming the order detail line and whether the quantity can be changed.

1. Check Availability

Use this processing option to specify whether the system notifies you of quantity availability before confirming the order detail line. You might perform availability checking during shipment confirmation if you do not hard commit inventory until shipment confirmation. Values are:

Blank: The system performs availability checking, but does not issue a warning that the ordered quantity exceeds the available quantity.

I: The system performs availability checking and issues a warning that the ordered quantity exceeds the available quantity.

If you set the Ship Confirm (P4205), Process tab, Auto Backorder or Cancel Unshipped Quantity processing option to backorder or cancel unshipped quantities, the system verifies backorder information in Item Master, Item Branch/Plant, Branch/Plant Constants and Customer Billing Instructions, and automatically backorders or cancel any quantity that is unavailable. If you leave that processing option blank, the quantity remains shippable.

2. Ship from Negative On-hand Quantity

Use this processing option to indicate whether the system allows you to ship from a location when the location has a negative on-hand quantity or the order quantity drives the quantity below zero. Values are:

Blank: The system allows you to confirm the order detail line and ship from location which has negative on hand quantity.

I: The system issues an error message to indicate that the location from which you are shipping does not have available quantity and does not allow you to confirm the order detail line from this location. You must choose another location from which to ship.

3. Prevent Over-shipping

Use this processing option to indicate whether the system allows you to increase the quantity of an order detail line during shipment confirmation. Values are:

Blank: The system allows you to increase the quantity of an order detail line during shipment confirmation.

I: The system does not allow you to increase the quantity of an order detail line during shipment confirmation.

Process

These processing options specify whether the Shipment Confirmation program allows you to:

- Override order information, such as the line type and ship to address.
- Relieve on-hand quantity

1. Override Line Type

Use this processing option to specify a code that controls how the system processes lines on a transaction. Line types affect the systems with which the transaction interfaces (General Ledger, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management). It also specifies the conditions for including a line on reports and in calculations. You must enter a value that is defined in the Line Type Constants Revisions form (P40205). Values are:

Blank: Order line type information can be changed for this order only. If you enter another line type, it must be a non-inventory line type.

2. Override Ship To Address

1: The line type cannot be changed. The line type is visible on the form, but you will not be able to override the information.

Use this processing option to indicate whether the default address information for the Ship To address can be changed. When you set up the Customer Master Information and Customer Billing Instructions, you define the Sold To address as the address to which you send the invoice and the Ship To address as the address to which you send the shipment. Values are:

Blank: The Ship To address can not be changed.

1: The Ship To address can be changed for this order only.

3. Backorder or Cancel Unshipped

Use this processing option to indicate whether the system backorders or cancels orders for which quantity is not available.

You can allow backorders by item or by customer, and specify whether the backorders are allowed at a specific branch/plant. To backorder an item, you must set the option, Backorders Allowed, in Item Master, Item Branch/Plant, Branch/Plant Constants and Customer Billing Instructions. If you allow backorders, the system holds the order detail line until quantity is available. If you do not allow backorders, the system cancels the order detail line.

Blank: The system does not backorder or cancel quantity that is not shipped. All remaining quantity will be shippable when it becomes available.

1: The system backorders or cancels quantity that is not shipped based on backorder information in Customer Billing Instructions, Item Master Information, Item Branch/Plant, and Branch/Plant Constants.

4. Relieve On Hand Inventory Override

Use this processing option to indicate whether the system allows you to relieve inventory when you confirm shipment. Values are:

Blank: The system relieves the on-hand quantity for the item when you confirm the shipment. You must add order types to the user defined code table (40/IU).

1: The system does not relieve the on-hand quantity for the item when you confirm the shipment. If you do not relieve on-hand quantities, the system does not perform additional processing, such as basic serial number processing, interoperability, and agreement information.

5. Ship and Debit Processing

Use this processing option to specify whether the system will use subsystem or batch processing (R45100) to identify and adjust ship and debit agreements when you run the Confirm Shipments program. Values are:

Blank: Do not use subsystem or batch processing

1: Use subsystem processing

2: Use batch processing

6. Sales Order Batch Price/Cost Update

Use this processing option to specify whether the system uses subsystem processing in the Sales Order Batch Price/Cost Update program (R42950) to update prices and costs during shipment confirmation. Values are:

Blank: Do not use subsystem processing.

1: Use subsystem processing.

7. Display Warning/Error for Ascending Date Rule check

Use this processing option to specify whether the system displays a warning or an error message when the system checks the ship date rule and the ship date rule fails during Shipment Confirmation. Values are:

Blank: Display a warning message.

I: Display an error message.

8. Process New Lots for Credit Orders

Use this processing option to determine whether the system assigns new lot numbers to credit orders during shipment confirmation. Before the system can assign new lot numbers, you must deactivate lot control. Values are:

Blank: Do not assign new lot numbers to credit orders.

I: Assign new lot numbers to credit orders.

9. Enable Next Order Status Preference

Use this processing option to activate the next order status preference in Shipment Confirmation (P4205). If the next order status preference is activated, it is applied to all sales order detail records on confirmed shipments. Values are:

Blank: Do not activate the next order status preference.

I: Activate the next order status preference.

Freight

These processing options specify whether the system retrieves freight information and whether you can override the freight and carrier information.

1. Freight Program (FUTURE)

Use this processing option to indicate whether the system retrieves freight information. You can standardize your freight and carrier information so that freight rate calculations are accurately calculated for the appropriate route, stop and zone. You can specify a preferred carrier for an item (Item Master and Item Branch/Plant), or a Customer Billing Instructions). Values are:

Blank: The system does not retrieve freight information and you can enter values that affect the current order only.

I: The system retrieves freight information and processes orders based on the default information that is set up in the Customer Billing Instructions or the Item Master Information.

2. Override Freight (FUTURE)

Use this processing option to choose whether the system processes orders based on the default information. To avoid overriding freight information for an order, you can disable this information. Values are:

Blank: The system processes orders based on the default information set up in the Customer Billing Instructions or the Item Master Information.

I: Default values can be changed for this order only.

Print

This processing option specifies whether the system prints invoices through the subsystem.

1. Subsystem Invoice (R42565)

Use this processing option to indicate whether the system prints invoices through the subsystem. If you use subsystem processing for printing invoices, you must specify the version of the Print Invoice program (P42565) to activate subsystem processing. Values are:

Blank: The system does not print invoices automatically.

I: The system prints invoices automatically.

Versions

These processing options specify the version that the system uses when you confirm an order detail line. If you leave a processing option blank, the system uses version ZJDE0001.

1. Sales Order Entry (P4210)	Use this processing option to indicate the version of Sales Order Entry (P4210) the system uses to create additional order detail lines during shipment confirmation. If you use this version of sales order entry in other programs, the system overrides the order line type that is set up in the Shipment Confirmation processing options with the order line type from the processing options for this version of Sales Order Entry.
2. Print Invoices (R42565)	Use this processing option to indicate the version of Print Invoices (R42565) the system uses to automatically print invoices through the subsystem. You must activate the processing option, Print Invoices Automatically, to activate subsystem processing. If you leave this option blank, the system uses version ZJDE0001.
3. Ship and Debit (R45100)	Use this processing option to specify the version of subsystem processing (R45100) that the system uses to identify and adjust ship and debit agreements when you run the Confirm Shipments program.
4. Sales Order Batch Price/Cost Update (R42950)	Use this processing option to specify the version of Sales Order Batch Price/Cost Update (R42950) that the system uses after each order is processed by the Shipment Confirmation program (P4205). Ensure that the version specifies subsystem processing; otherwise the data required to create the report might not be available.
5. Carton Reorganization (P4620)	Use this processing option to determine which version of the Carton Reorganization program (P4620) the system uses. If you leave this processing option blank, the system uses version ZJDE0001.

Warehouse

These processing options define additional processing for tare and pack confirmation. If you follow UCC 128 requirements, you can confirm tare and pack information after you confirm an order detail line.

1. Pack Confirmation	Use this processing option to indicate whether you are confirming packs for shipment. Values are: <i>Blank:</i> Do not use pack confirmation. <i>I:</i> Use pack confirmation. The system verifies that the appropriate serial shipping container code (SSCC) and shipping container code (SCC) are entered for each record and they correspond with the hierarchical configuration that is specified in Shipment Entry. For example, if you enter an SOTPI (Shipment, Order, Tare, Pack, Item) configuration in Shipment Entry but you have not entered a pack SSCC or an SCC, the system displays an error message. The system verifies that the SCC and the unit of measure for each item correspond to the information in the Item Master and Item Cross-Reference

Revisions. The sum of the Tare/Pack quantities must equal the shipped quantity on the sales order line. The system converts the SCC unit of measure to the UPC quantity if an SCC has been entered. For example, if you confirm the shipment of 24 cases of soda, the system verifies that you are confirming shipment of 144 cans of soda.

If you follow UCC 128 requirements, you must specify a version of Pack confirmation.

2. Pack Confirmation Version (P4216)

Use this processing option to indicate the version of Pack confirmation the system uses when you are confirming packs for shipment. This processing option is in effect only if you activate the processing option to use pack confirmation. If left blank, the system uses version ZJDE0001.

Quality

If you use Sales Order Management with the Quality Management system, these processing options specify the versions to produce test results and a certificate of analysis.

1. Test Results Revisions Version (P3711)

Use this processing option to indicate the version of Test Results Revisions (P3711) the system uses to verify quality specifications when you confirm the shipment of an item. The system uses this version to verify item characteristics to allowed minimum and maximum values, lot status, and acceptable quantities or percentages. If a lot passes quality inspection and meets the specifications, it is available for shipment to the customer.

If you leave this processing option blank, the system uses version ZJDE0001.

2. Certificate of Analysis

Use this processing option to indicate whether the system prints a Certificate of Analysis (COA). A COA is a list of all of the tests performed and the results for lots sold to a customer. Values are:

Blank: The system does not automatically print a Certificate of Analysis.

1: The system automatically prints a Certificate of Analysis.

To generate a COA, you must specify a version in the processing option, Certificate of Analysis Extract Version, to obtain the information.

3. Certificate of Analysis Extract Version (R37900)

Use this processing option to indicate the version of the Certificate of Analysis Extract program (P37900) the system uses to generate a COA. This processing option is in effect only if you have activated the processing option to Print a Certificate of Analysis.

If you leave this option blank, the system uses version ZJDE0001.

4. Certificate of Analysis Subsystem

Use this processing option to indicate whether the system prints the Certificate of Analysis through the subsystem. If you use subsystem processing, you must also specify the subsystem version of the Certificate of Analysis Extract in the processing options. Values are:

Blank: The system does not print the Certificate of Analysis through the subsystem process.

1: The system prints the Certificate of Analysis in a subsystem process.

5. Evaluate Quality Tests

This processing option is used when the lots being confirmed for shipment need to be re-evaluated for quality. When test results are entered for a lot, the lot status is set based on whether the test results are within quality ranges

for the item. However, a customer may have different quality standards for this product.

When this option is enabled, the quality tests will be re-evaluated to determine whether the lot being shipped has passed quality standards for the customer on this order. Values are:

1: Re-evaluate test results using quality management preferences.

Blank: Do not re-evaluate test results. If this option is selected, a lot may be confirmed for shipment even though it does not pass the customer's quality criteria for this product.

Agreements

If you use Sales Order Management with the Agreement Management system, these processing options define the method that the system uses to select agreements.

1. Specify Borrow Agreement Destination

If you use Agreement Management in conjunction with the Sales Order Management system, use this processing option to enter a specific delivery destination for an item that is part of an agreement.

2. Agreement Search Method

Use this processing option to identify the method by which the system selects an agreement. Values are:

Blank: The system assigns an agreement based on the earliest expiration date.

1: The system automatically assigns an agreement if only one is found.

2: The system prompts you to assign an agreement.

3: The system assigns an agreement based on the earliest expiration date.

Interop

These processing options specify whether you perform interoperability processing.

1. Interoperability Transaction Type

Use this processing option to activate interoperability processing. Values are:

Blank: Bypass outbound interoperability.

1: Process outbound interoperability.

2. Run the Outbound Subsystem UBE

Use this processing option to indicate whether the system processes outbound interoperability transactions through the subsystem. Values are:

Blank: Bypass outbound subsystem processing.

1: Perform subsystem processing.

Bulk

This processing option specifies the method that the system uses to process temperature gain/loss records.

1. Bulk Transaction Volumes

Use this processing option to write temperature gain/loss records for customers billed at ambient temperature when the inventory has been relieved at standard temperature. The gain or loss is calculated in either of the following ways, cost or revenue. Values are:

Blank: The system does not process temperature gain/loss records

1: For cost, the system computes the difference between the extension of ambient volume multiplied by cost and standard volume multiplied by cost. The calculation uses the primary unit of measure.

2: For revenue, the system computes the difference between the extension of ambient volume multiplied by price and standard volume multiplied by price. The calculation uses the pricing unit of measure.

Interbranch

These processing options specify the order types for interbranch orders.

1. Enter the version for the Create Intercompany Sales Order (R4210IC). Use this processing option to identify the version of Create Intercompany Sales Orders (R4210IC) system uses to verify the order types for intercompany orders. Use an intercompany order to fill a sales order from a branch/plant other than the selling branch/plant. This is helpful if your company sells from one location but fills and ships orders from another location, such as a central supply warehouse.

If you leave this option blank, the system uses ZJDE0001.

2. Call the Create Intercompany Sales Order Use this processing option to indicate whether the system creates intercompany orders when you create new order detail lines. Values are:

Blank: The system does not create intercompany orders.

1: The system creates orders through the Create Intercompany Orders (R4210IC) in batch mode. In batch mode, the system processes the job immediately and you will not be able to work interactively until the system has processed the order.

2: The system create orders through the Create Intercompany Orders (R4210IC) in subsystem mode. In subsystem mode, the system processes the job from a queue. You can continue to work interactively when you process orders in subsystem mode.

Prepayment

These processing options specify whether you can record payment information for orders.

Prepayment of an order takes place when a seller receives a form of payment from the customer at the time of order entry. Many types of prepayments are available for a customer to use, such as cash, check, and credit card. When you make any type of prepayment, the system records transaction information for each order detail line, and indicates the payment on the invoice.

If an order detail line is over shipped, or an additional order detail line is added to the order, you must receive a new authorization.

1. Prepayment Processing Enter 1 for Prepayment Transaction to be updated. If left blank, Prepayment Transactions will not be updated.

2. Process Authorization Enter a value to indicate how the system processes authorizations. Values are:

1: The system processes authorizations interactively.

2: The system processes authorizations in batch or subsystem mode, depending on the version.

Blank: The system does not process authorizations.

3. Process Settlement	Enter a value to indicate how the system processes settlements. Values are: <i>1:</i> The system processes the settlement interactively. <i>2:</i> The system processes the settlement in batch or subsystem mode. <i>Blank:</i> The system does not process the settlement.
4. Authorize Prepayment Transaction	Enter the version of the Authorize Prepayment Transaction UBE to Run. If left blank, authorization will not be run.
5. Settle Prepayment Transaction	Enter the version of the Settle Prepayment Transaction. If you leave this option blank, the system does not run this application.
6. Authorization Hold For Prepayment Processing	Enter the hold code to display on the order if the authorization process fails.
7. Settlement Hold For Prepayment Processing	Enter the hold code to display on the order if the settlement process fails.

Carton Detail

Use these processing options to specify how the system processes cartons.

1. Shipment Confirmation Carton Status	Use this processing option to specify the carton status for shipment and load confirmation. All cartons must be at this status for the shipment or load to be confirmed. Values are chosen from the Carton Status (46/CS) user defined codes. If left blank, carton status will not be validated.
2. Reconcile Carton Detail to Shipment Detail	Use this processing option to reconcile the carton detail to the shipment detail. Reconciliation will compare item quantities to the quantity being confirmed on the sales order. Values are: <i>Blank:</i> No <i>1:</i> Yes

CHAPTER 11

Working with Replenishment

This chapter provides an overview of replenishment and discusses how to:

- Work with replenishment requests.
- Work with replenishment suggestions.
- Work with replenishment to random locations.

Understanding Replenishment

Replenishment is the process of refilling picking locations with items. You obtain these items from a replenishment location that you have set up to refill picking locations. You can tie specific replenishment zones to specific picking locations or picking zones.

You can create a replenishment request in response to picking that depletes the items in a location. You use replenishment requests to generate suggestions for locations from which to replenish items. The system tracks the items in each location. You can find locations containing the items you need to replenish and then create suggestions to replenish from those locations.

You can use the locations that the system suggests for you and then confirm your movement of the items from the chosen replenishment location to the picking location.

When you choose to replenish to random picking locations, you group the locations to which you want to replenish items to maximize the efficiency of the replenishment process. When you replenish to fixed locations, you replenish to only one location at a time. When you replenish to random locations, you can replenish items in many locations at once when you run the Replenishment to Random Locations program (R461602).

If the branch/plant has license plate functionality activated, the system allows you to select the license plate record with the location. You can create putaway or replenishment requests for items and license plates.

Working with Replenishment Requests

This section provides an overview of replenishment requests and discusses how to:

- Create replenishment requests interactively.
- Set processing options for Manual Replenishments (P46100).
- Create replenishment requests by batch.
- Create automatic replenishment requests
- Set processing options for Location Selection Driver (R46171)

- Locate existing replenishment requests.

Understanding Replenishment Requests

You create replenishment requests to refill picking locations in which items are depleted. A replenishment request contains information about the item, such as:

- Branch/plant
- Item number
- Unit of measure
- Quantity
- License plate number

The system uses this information to create suggestions for replenishment, based on the replenishment instruction tables and other setup that you define.

You might need to locate an existing replenishment request. For example, to verify that you have created a replenishment request for an item that you just picked, you locate the request using unique criteria, such as an order number, a document type, or an item number.

You also can cancel a replenishment request and stop further processing. For example, if the customer cancels a sales order, you would cancel the pick request for the order. Because you did not pick those items, you do not need to replenish the picking location.

Interactive Method

Use the Manual Replenishments program (P46100) to create replenishment requests interactively.

Batch Method

You create replenishment requests by batch under normal warehouse operating conditions. The system determines all depleted fixed picking locations and creates replenishment requests for them. You typically run the batch program during off-peak hours when more system resources are available.

Each fixed picking location has two letdown points. The following letdown points represent the quantity level that determines whether the Fixed Location Replenishment program (R461601) creates a replenishment request:

- Normal replenishment (for example, 25 percent location capacity)
- Minimum replenishment (for example, 10 percent location capacity)

You can set the processing options for the Fixed Location Replenishment program to use either the normal or minimum replenishment point when you create replenishment requests. Typically, you use the normal replenishment point for the batch replenishment process (which you usually run once each day). You use the minimum replenishment point for automatic replenishments, which can occur at the time you create pick suggestions.

You must also set the processing options in the Fixed Location Replenishment program to determine the quantity that the system should replenish, as follows:

- Economic (a specific quantity that you determine).
The value that is stored in the Fixed Picking Location file (F46012).
- Maximum (the quantity required to completely refill the location).

Calculated during the request creation based on some of the Putaway and Item Setup.

When you create replenishment requests by batch, the system creates suggestions immediately. This helps to prevent over-replenishment because you would move inventory quickly before a pick cancellation could eliminate the need for a location's replenishment.

When you run the Fixed Location Replenishment program, the system can:

- Select the picking locations that are below the normal or minimum replenishment point
- Create replenishment requests
- Create replenishment suggestions
- Update each request status in the Warehouse Requests table (F4600)
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports

You control which functions the system performs by setting processing options in the Fixed Location Replenishment program.

Automatic Method

Use the Location Selection Driver program (R46171) to automatically replenish picking locations when picking depletes the stock to minimum replenishment levels. This process keeps picking locations sufficiently stocked.

With automatic replenishment, the system creates a replenishment request when it cannot fill a pick request from fixed picking locations. When you create picking location suggestions, the system can:

- Create replenishment requests for depleted picking locations
- Create replenishment location suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm replenishment suggestions

You control which functions the system performs by setting processing options in each program that the subsystem controls.

Existing Replenishment Requests

You might need to locate an existing replenishment request. For example, to verify that you have created a replenishment request for an item that you just picked, you can locate the request using unique criteria, such as an order number, a document type, or an item number.

You also can use Replenishment Requests to cancel replenishment requests and stop further processing. For example, if the customer cancels a sales order, you would cancel the pick request for the order. Because you did not pick those items, you do not need to replenish the picking location.

Forms Used to Work with Replenishment Requests

Form Name	Form ID	Navigation	Usage
Manual Replenishments	W46100B	Replenishment Operations (G4613), Manual Replenishments	Create replenishment requests interactively.
Replenishment Requests Inquiry	W4600A	Replenishment Operations (G4613), Replenishment Requests	Locate existing replenishment requests.

Creating Replenishment Requests Interactively

Access the Manual Replenishments form.

By Item Quantity	Select to create requests by item. The system displays the Item Number, Quantity, and U/M fields if you select this option.
By License Plate	Select to create requests by license plate number. The system displays the License Plate Number field if you select this option.
License Plate Number	Enter the license plate number. This number is a unique value that identifies a collection of items and/or other license plates. The license plate number is typically used to simplify movements and inventory transactions. You can search and select license plate records from the License Plate Workbench — View License Plate Information form.

Setting Processing Options for Manual Replenishments (P46100)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use this processing option to specify which order type the system uses.

1. Order Type	Use this processing option to specify the order type. Order types are defined in UDC 00/DT.

Process

Use these processing options to specify how the system processes requests.

1. Enter the Process Mode	Use this processing option to enter the process mode. Values are: <i>Blank or 1:</i> Create the request only.

2. Version of Location Selection Subsystem (R46171)

2: Create the request and process it through the subsystem.

Use this processing option to enter the subsystem version of Location Selection. If you leave this processing option blank, the system uses version XJDE0007.

3. Activate Movement Quantity

Use this processing option to determine whether the system allows you to move a quantity that is greater than the quantity available. Use this processing option only if you are working with non-serial/non-license plate movements for which the from location is already defined. Values are:

Blank: Do not allow movements for quantities that are greater than the quantity available.

1: Allow movements for quantities that are greater than the quantity available.

Creating Replenishment Requests by Batch

To create replenishment requests by batch, select Replenishment Operations (G4613), Fixed Location Replenishment.

Creating Replenishment Requests Automatically

Before you create replenishment requests automatically, verify that you have:

- Set up picking instructions for automatic replenishment.
- Set up location profiles for replenishment.
- Set up replenishment instructions for replenishment.
- Set up fixed picking locations for automatic replenishment.
- Set up fixed replenishment zones for replenishment.
- Set a processing option in the pick requests version of the Location Selection Driver program (R46171) to create replenishment requests.

To create replenishment requests automatically, select Replenishment Operations (G4613), Process Replenishment Requests.

See Also

Defining Movement Instructions in the Warehouse Management Guide

Defining Location Profile Information in the Warehouse Management Guide

Setting Up Fixed Locations and Zones in the Warehouse Management Guide

Creating Replenishment Suggestions in the Warehouse Management Guide

Setting Processing Options for Location Selection Driver (R46171)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Task and Trip

Use these processing options to specify how the system processes task and trip information.

1. Immediate Task and Trip Assignment	Use this processing option to specify whether the system immediately assigns task and trips. Values are: <i>Blank:</i> None assigned. <i>1:</i> Assign immediate task and trip.
2. Task Trip Version	Use this processing option to specify which version of the Task and Trip Creation program (R46471) the system uses. If you leave this processing option blank, the system uses version XJDE0001.

Audit

Use this processing option to specify whether the system generates the audit report.

1. Audit Report	Use this processing option to specify whether the system generates the audit report and, if so, whether to include glossary text in the report. Values are: <i>1:</i> Generate the audit report. <i>2:</i> Generate the audit report and include a glossary for any message. <i>3:</i> Generate the audit report and include a complete glossary at the end of the report.

Confirmation

Use these processing options to specify how the system processes confirmations.

1. Confirm Suggestions	Use this processing option to specify whether the system automatically confirms suggestions. Values are: <i>Blank:</i> Do not automatically confirm suggestions. <i>1:</i> Automatically confirm suggestions.
2. Version of the Batch Confirmation Program	Use this processing option to determine which version of the Batch Confirmations program (R4617) the system uses. If you leave this processing option blank, the system uses XJDE001.

Resuggestions

Use this processing option to specify how the system processes resuggestions.

1. Resuggest Requests	Use this processing option to determine how the system processes requests. Values are: <i>Blank:</i> Process only new, non-processed requests.

I: Resuggest movement requests.

Replenishment

Use these processing options to specify how the system processes automatic replenishments.

1. Method to Use for Automatic Replenishment Quantities

Use this processing option to enter the method that the system uses to determine replenishment quantities. Values are:

Blank or 2: Use the maximum replenishment method. The quantity to replenish is the quantity that fills the location.

I: Use the economic replenishment method. The quantity to replenish is retrieved from the fixed location.

2. Version

Use this processing option to specify which version of the Task and Trip Creation program (R46471) the system uses for replenishment. If you leave this processing option blank, the system uses XJDE0003.

Edits

Use this processing option to specify the allowed lot status group.

1. Allowed Lot Status Group

Use this processing option to enter the allowed lot status group to validate. During the warehouse selection location process, the system validates the non-blank lot status codes against the user defined status code values. If the non-blank lot status codes exist in the Allowed Lot Status table (F41081), the system treats the user defined lot status codes as blank, and the on-hold item continues through the location selection process.

Locating Existing Replenishment Requests

Access the Replenishment Requests Inquiry form.

Request Batch Number

The batch number assigned to one set of putaway, picking, or replenishment requests. This number comes from next numbers for system 46.

Order Number

A number that identifies a document. For example, the document can be a purchase order, invoice, or sales order.

Working with Replenishment Suggestions

This section provides an overview of replenishment suggestions, lists prerequisites, and discusses how to:

- Create replenishment suggestions interactively.
- Create replenishment suggestions by batch.
- Create alternate replenishment suggestions.
- Create tasks and trips.
- Create the summary document.
- Create move tags.

- Confirm replenishment suggestions interactively.
- Confirm replenishment suggestions by batch.
- Override replenishment suggestions.

Understanding Replenishment Suggestions

After you create replenishment requests, you create replenishment suggestions to move items from replenishment locations and refill depleted picking locations. You can create replenishment suggestions by batch with the Process Replenishment Requests menu option. Also, you can create alternate pick suggestions by using the Location Selection Driver program's (R46171) resuggestions version with the correct processing options selected to replace existing suggestions with which you do not agree.

Batch Method

You create replenishment suggestions by batch to process replenishment requests on a regular basis. You typically run batch programs during off-peak hours when more system resources are available.

When you run the Location Selection Driver program's (R46171) version for processing replenishment requests, the system can:

- Select all outstanding replenishment requests
- Update each request's status in the Warehouse Requests table (F4600)
- Create replenishment location movement suggestions
- Assign tasks and trips
- Print audit reports
- Confirm replenishment suggestions
- Replenish inventory using either the economic or maximum quantity method

You control which functions that the system performs by setting processing options in the Location Selection Driver program.

Interactive Method

You can create suggestions interactively to select locations for replenishment. You can either allow the system to suggest a location or manually specify replenishment information such as the quantity, the unit of measure, and the location.

If you want the system to suggest locations automatically when you access the Manual Replenishment Location Planner form, you must set the appropriate processing option on the Manual Planner tab for the Request Inquiry program (P4600).

Alternate Replenishment Suggestions

You can create replenishment suggestions with the Location Selection Driver program's (R46171) version for resuggestions, which you use to replace existing suggestions with which you do not agree. You access this version through the processing options for the Location Selection Driver program.

Creating alternate suggestions replaces any previous location suggestions. With alternate suggestions, you can access new inventory locations that you might have added since you created the first suggestions or locations with new available inventory.

Important! To create alternate replenishment suggestions, you must cancel the original replenishment suggestions manually. The Location Selection Driver program does not cancel existing suggestions.

If you have not changed inventory locations or levels in your warehouse, and you want to create suggestions for locations that are different from previously suggested locations, you must change the replenishment instructions table or something else in the setup, such as Process Selection, Fixed Replenishment Zones, etc. For example, you could change the replenishment instructions table to choose a new replenishment zone or to use a different tiebreaker rule to choose locations. If you do not change the replenishment instructions or something else in the setup, such as Process Selection, Fixed Replenishment Zones, etc., the system suggests the same locations as in the previous suggestions.

Tasks and Trips

After you have created suggestions for putaway, picking, or replenishment, you can create task/trip assignments (if you have not already done so when creating suggestions), and create customized move documents to help your warehouse personnel efficiently move inventory through your warehouse.

The system can assign task and trip numbers to suggestions when you create and process suggestions. A task is a group of suggestions, and a trip is each suggestion in the task.

If the system did not assign task and trip numbers to suggestions when you created and processed suggestions, you can run a batch process for task and trip number assignment.

When you run the Task and Trip Creation program (R46471), it is important to activate data sequencing so that you can verify the information that the system uses to assign task and trip numbers.

When you run the Task and Trip Creation program, you can specify the following information:

- Maximum quantity information, such as the maximum number of tasks and trips (by leaving the default value of blank or zero, you can specify an unlimited number of tasks and trips)
- Whether you want the system to print the supporting documents when you run the Move Slips program (R46472) with the task and trip assignments
- Whether you want the system to recommend cartons during picking
- Whether the system generates the Carton Detail Information table (F4620), which contains detailed information about the contents of each carton during picking
- Which version of the Carton Reorganization program (P4620) the system uses if selecting to generate Carton Detail Information during picking.

After you run the Task and Trip Creation program, you can print a supporting documents to review task and trip assignments.

Summary Document

Use the Move Slips program (R46472) to print a summary document that contains information for all the suggestions that you created. The summary document is also referred to as a move document or move slip. This report page breaks by the task number. The summary document includes information such as:

- Trip number
- To and From locations
- Item number and description
- Quantity information
- Unit of measure information

After you create and review the summary document, you can print move tags, which enable warehouse personnel to plan the movement of inventory throughout the warehouse.

Move Tags

When you run the Move Tags program (R46473), the system creates move tags for the suggested location during putaway, picking, and replenishment. A move tag contains information such as:

- The item that warehouse personnel are moving
- The item unit of measure
- To and From locations

You can print tags for each trip or for each unit of measure moved on the trip, depending on your definition of the item on Item Unit of Measure Definition Revisions. You can scan the move tags to facilitate movements, storage, confirmation, and other downstream material handling and counting operations.

Examples of other Warehouse Management programs from which you can automatically print move tags (by setting processing options or by choosing row exits or form exits) are:

- Batch Putaway Reservations (R461301)
- Location Selection Driver (R46171)
- Move Slips (R46472)
- Warehouse Movement Confirmations (P4617)

Replenishment Suggestion Confirmation

If you agree with the system's suggestions for replenishment locations, you confirm them interactively or by batch using Warehouse Movement Confirmations (P4617). If you do not agree, you can override the suggestions and specify a location of your choice, or you can cancel the existing suggestions and stop further processing.

When you confirm suggestions for replenishment, you:

- Reduce on-hand inventory in the replenishment location
- Relieve the commitment of or outbound quantity of inventory in the replenishment location
- Increase on-hand inventory in the picking or replenishment location
- Relieve the commitment of inbound inventory in the picking or replenishment location

Replenishment confirmation ensures that the system's records match actual inventory movements by updating the following tables:

- Item Location File (F41021)
- Location Detail Information (F4602)

Note. For Branch Plants that have the License Plate process turned OFF

- Item Ledger File (F4111)
- Warehouse Requests (F4600)
- Warehouse Suggestions (F4611)
- Warehouse Task Header (F4601)

Note. For Branch Plants that have the License Plate process turned on, we also update the F46L10 License Plate Master, the F46L11 License Plate Item Detail, the F46L12 License Plate Commitment, the F46L30 Location Capacity and the F46L99 License Plate History table.

Interactive Confirmation

If you agree with the system's suggestions for replenishment locations, you confirm them interactively using the Warehouse Movement Confirmations program (P4617).

Batch Confirmation

You can confirm replenishment suggestions by batch when you run the Batch Confirmations program (R4617). The system automatically confirms suggestions if there are no errors during the confirmation process and prints all of the suggestions that were not confirmed. If you set the appropriate processing option, the system prints the corresponding description of the error on the report after it processes all suggestions.

Note. Before you confirm replenishment suggestions by batch, you should review and override suggestions as necessary because after you run the Batch Confirmations program, you cannot reverse the confirmations.

Overrides

You can override replenishment suggestions and specify a location of your choice, or you can split a suggestion into two locations.

Prerequisites

Before you complete the tasks in this section:

- Verify that you have set up order groups and process groups for your stock items.
- Verify that you have set up replenishment instruction tables to designate specific locations based on the items' order and process groups.
- Verify that the system has created suggestions.
- Verify that you have set up Fixed Locations, Random Rules, etc.?

Forms Used to Work with Replenishment Suggestions

Form Name	Form ID	Navigation	Usage
Manual Replenishment Location Planner	W4600B	Replenishment Operations (G4613), Replenishment Requests On the Replenishment Requests Inquiry form, select a record and from the Row menu, select Manual Planner.	Create replenishment suggestions interactively. To allow the system to create a suggestion, select a row and click Select and then click OK. If you have already set the processing option on the Manual Planner tab to automatically suggest locations, you do not need to select the row to create suggestions. To manually create a suggestion, select a row, and enter the appropriate quantity, unit of measure, and location.
Process Transactions	W4617A	Replenishment Operations (G4613), Confirm Replenishment On the Work With Warehouse Confirmations form, select a record and select Confirm from the Row menu, then click Process from the Form Exit. Click Cancel.	Confirm replenishment suggestions interactively.
Override Suggestion	W4617C	On the Work With Warehouse Confirmations form, select a record and select Override from the Form menu.	Override replenishment suggestions.

Creating Replenishment Suggestions by Batch

To create replenishment suggestions by batch, select Replenishment Operations (G4613), Process Replenishment Requests.

Creating Replenishment Suggestions Interactively

Access the Manual Replenishment Location Planner form.

Creating Alternate Replenishment Suggestions

To create alternate replenishment suggestions, select Replenishment Operations (G4613), Process Replenishment Requests.

Note. You will need specific Processing Options and Data Selection of this task to create alternate replenishment suggestions

Creating Tasks and Trips

To create tasks and trips, select Warehouse Move Documents (G4621), Create Tasks and Trip.

Creating the Summary Document

To create the summary document, select Warehouse Move Documents (G4621), Summary Document.

Creating Move Tags

To create move tags, select Warehouse Move Documents (G4621), Move Tags.

Confirming Replenishment Suggestions Interactively

Access the Process Transactions form.

To confirm replenishment suggestions interactively, select Replenishment Movement Confirmation (P4617) from the G4613 menu.

Confirming Replenishment Suggestions by Batch

To confirm replenishment suggestions by batch, select Replenishment Operations (G4613), Batch Replenishment Confirmations.

Overriding Replenishment Suggestions

Access the Override Suggestion form.

Working with Replenishment to Random Locations

This section provides an overview of replenishment to random locations, lists prerequisites, and discusses how to:

- Define replenishment groups.
- Set processing options for Replenishment Groups (P46014).
- Define detailed replenishment information.
- Set processing options for Replenishment by Random Rules (P46015).
- Run the Random Location Replenishment program (R461602).

Understanding Replenishment to Random Locations

Replenishment to random locations allows you to maximize the efficiency of the replenishment process by grouping locations for picking and allows you to replenish items over a set of locations. When you replenish to fixed locations, you replenish to only one fixed picking location at a time. When you replenish to random rule locations, you can replenish items in many random rule locations at the same time.

For example, the constant demand for an item can require you to store a certain item quantity near the shipping dock for picking at all times. Your warehouse has many random rule storage locations that are close to the shipping dock. By setting up replenishment to random locations, you enable the system to suggest replenishment to the random rule locations that are closest to the shipping dock.

Replenishment Groups

Replenishment is the process of refilling picking locations with items. To define the random rule picking locations to replenish, you use random rules, which are sets of criteria that the system uses to identify locations for the random distribution of items in the warehouse. The system matches locations to random rules if the locations meet the criteria that you have defined for each random rule.

If you want to replenish to numerous random rule locations simultaneously, you assign the random rule to a replenishment group. A replenishment group is a user defined code (46/RG) that contains one or more random rules for replenishment. By specifying multiple random rules for a replenishment group, you enable the system to identify many different random locations to which it replenishes inventory when you run the Replenishment to Random Locations program (R461602).

For each random rule that you specify, you also can specify the sequence in which the system replenishes locations that meet the criteria of each random rule, as well as whether the rule is active. When you specify a sequence, the system processes each random rule in the order that you specified. When you specify whether a rule is active, the system either processes the rule or skips the rule if it is inactive.

You can specify a zone and zone type to further limit the random rule picking locations that the system identifies for replenishment.

You also can specify effective and expiration dates for a replenishment group.

Detailed Replenishment Information

After you have defined replenishment groups, you define detailed replenishment information for each random rule. You can define detailed replenishment information for either an individual item or warehouse process groups. When you define detailed replenishment information for warehouse process groups, you define information that applies to all items within warehouse process groups rather than to just a single item. However, within the warehouse process groups, you might want to replenish some items differently than others. In this case, you define detailed replenishment information for individual items within the warehouse process groups. When you run the Replenishment to Random Locations program (R461602), the system always overrides the detailed replenishment information for the warehouse process groups with the detailed replenishment information that you specify for individual items.

For each random rule, you can specify the following information:

- Warehouse process groups
- Order group
- Item information
- Unit of measure
- Minimum and normal replenishment points
- Item quantity calculation method

- Zone
- Move by unit of measure

The system uses an item's warehouse process groups and order group that you specify to determine which putaway and replenishment movement instruction table to use to determine the To and From locations for replenishment, respectively.

By specifying the unit of measure and minimum and normal replenishment points, you indicate the minimum quantity of inventory that the random locations must contain to satisfy picking requirements and when replenishment must occur to ensure a sufficient quantity on hand.

To calculate the replenishment quantity, the system uses the item quantity calculation method that you specify. To determine the on-hand quantity in a set of random picking locations, you can instruct the system to count using three different methods:

- Count only the F4602 records that have the Replenishment Information UOM as the highest/largest (Level 1) UOM.
- Count quantities across all levels in an item's unit of measure structure
- Count quantities in the primary unit of measure rounded to the UOM of the Replenishment Information.

You can specify a zone and zone type to further limit the random rule picking locations that the system identifies for replenishment. If you specified zone and zone type for a replenishment group and choose to specify zone and zone type for the individual random rules, the zone information in both applications (P46014 and P46015) must match. Otherwise, the system cannot successfully replenish to locations within the zones.

Random Location Replenishment Program (R461602)

After you have defined replenishment groups and detailed replenishment information for the random rules within each replenishment group, you can run the Replenishment to Random Locations program (R461602). The system automatically creates replenishment requests and replenishment suggestions by using the information that you specified.

To expedite processing, you should run the Replenishment to Random Locations program during off-peak hours when more system resources are available.

Note. During data selection, you can specify one or more of the replenishment groups that you defined in the Replenishment Groups program (P46014). Processing options allow you to enter other information, such as:

Order group for the From location

Replenishment points

Maximum or economic quantity method for replenishment

Overfill

Reservations

Reservation days

Commitments

Audit report

Task and trip

Prerequisites

Ensuring the correct setup of information such as items, locations, warehouse process groups, license plate information, and order groups before you set up replenishment to random locations is critical to the accuracy and predictability of the results after you run Replenishment to Random Locations (R461602). The information below will help you review and verify the setup of your warehouse, and troubleshoot problems if the results vary from your expectations.

- Verify that the items that pertain to the putaway, picking, and replenishment processes are set up in the Inventory Management system. Review item information, such as the branch/plant to which the item is assigned, specific item locations within the branch/plant, the item unit of measure and associated conversions, and item quantities.

See Entering Item Master Information in the Inventory Management Guide.

See Entering Branch/Plant Information in the Inventory Management Guide.

See Locating Quantity Information in the Inventory Management Guide.

See Setting Up License Plate Information

- Verify that the locations that pertain to the putaway, picking, and replenishment processes are set up in the Inventory Management system. Review location information such as primary and secondary locations, and whether location control has been activated.

See Working with Item Locations in the Inventory Management Guide.

- Verify that you have set up random locations, which consists of defining location characteristics and setting up random rules. If you have defined location characteristics and set up random rules, you also should verify that you have created the random location table.

See Setting Up Random Requirements in the Warehouse Management Guide.

- Verify that you have defined location profile information to allow putaway and replenishment for To and From locations, respectively.

See Defining Location Profile Information in the Warehouse Management Guide.

- Verify that the size of the random locations can accommodate the item quantity that you plan to replenish to the locations.

See Defining Location Dimensions in the Warehouse Management Guide.

See Defining Location Capacity in the Warehouse Management Guide.

- Verify that you have defined the item warehouse process groups. The system uses an item's warehouse process groups in combination with the order group to identify the putaway and replenishment instruction tables. Putaway and replenishment instruction tables determine the To and From locations for putaway and replenishment, respectively.

See Entering Item Branch Classification Codes (Optional) in the Inventory Management Guide.

- Verify that you have set up order groups and specified order types IQ (Inventory Quantity) and OP (Purchase Order) for order types with which you are working.

See Setting Up Order Groups in the Warehouse Management Guide.

- Verify that you have correctly defined putaway movement instructions and replenishment movement instructions. The system uses putaway and replenishment instruction tables to determine the To and From locations for random location replenishment.

See Defining Movement Instructions in the Warehouse Management Guide.

Forms Used to Work with Replenishment to Random Locations

Form Name	Form ID	Navigation	Usage
Replenishment Groups	W46014B	Warehousing Movement Rules (G46311), Replenishment Groups On the Work With Replenishment Groups form, click the Add button.	Define replenishment groups. After you have defined the replenishment group, you can define detailed replenishment information.
Replenishment Information by Random Rules	W46015B	Warehousing Movement Rules (G46311), Replenishment by Random Rules On the Work With Replenishment Information by Random Rules form, click the Add button.	Define detailed replenishment information. After you have defined detailed replenishment information, you can run the Replenishment by Random Locations program (R461602) to create replenishment requests and suggestions.

Defining Replenishment Groups

Access the Replenishment Groups form.

Replenishment Group

A user defined code (46/RG) that the system uses to identify a replenishment group, which consists of random rules that you specify in the Replenishment Groups program (P46014). The system uses the random rules that you specify to identify random rule picking locations for replenishment.

Sequence

A number that specifies the sequence of information.

Random Rule

A code (system 46/type SR) that identifies a random requirements table. If you use Random, Empty or Existing locations for the movement method, you can enter a random rule code to consider only locations whose characteristics match the random rule. You can leave Random Rule blank to have the system consider all locations for each movement method.

Zone

Enter a code that identifies an area within a warehouse. Values are stored in user defined code table 46/ZN.

Zone Type

A code to specify what type of zone is being used for this replenishment random rule. This is related to the Zone field. Values are:

- 1: Putaway Zone
- 2: Picking Zone
- 3: Replenishment Zone

Active (Y/N)

A code that indicates whether a row in the detail area is active and whether the system will process the information in the row when you run Replenishment to Random Locations (R461602). Values are:

- Y: Process the information in the row.
- N: Do not process the information in the row.

Effective Date From	The date from which the replenishment information is effective.
Effective Date Through	The date through which the replenishment information is effective.

See Also

Setting Up Random Requirements in the Warehouse Management Guide for more information about setting up random rules

Setting Processing Options for Replenishment Groups (P46014)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

These processing options allow you to specify the default information that the system displays, such as effective dates.

- 1. Active**

Use this processing option to specify whether the system processes the information that is contained in a row in the detail area when you run the Replenishment to Random Locations program (R461602).

Y: The system processes the information.

N: The system does not process the information.
- 2. Date - Effective From**

Use this processing option to specify the date from which the replenishment information is effective.
- 3. Date - Effective Through**

Use this processing option to specify the date up to which the replenishment information is effective.

Defining Detailed Replenishment Information

Access the Replenishment Information by Random Rules form.

Setting Processing Options for Replenishment by Random Rules (P46015)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Default

These processing options allow you to specify the default information that the system displays, such as effective dates.

- 1. Active**

Use this processing option to specify whether the system displays active or inactive rows in the detail area. An active row contains a group of random picking locations to which you want to replenish. An inactive row contains a group of random picking locations to which you do not want to replenish.

Blank: Display all rows in the detail area.

1: Display only the active rows in the detail area.

2: Display only the inactive rows in the detail area.
- 2. Date - Effective From**

Use this processing option to specify the date from which replenishment is effective.
- 3. Date - Effective Through**

Use this processing option to specify the date up to which the replenishment information is effective.
- 4. Item Quantity Calculation Method**

Use this processing option to specify the method that the system uses to calculate the item quantity that is on hand. Values are:

1: Calculate an item's existing quantity by using the level 1 unit of measure.

2: Calculate an item's existing quantity by using the primary unit of measure.

3: Calculate an item's existing quantity by using the level 1-5 unit of measure.
- 5. Order Group**

Use this processing option to specify a user defined code (46/DT) that identifies the type of group, such as rush orders or special orders. The system uses the code that you specify in conjunction with the warehouse process group for the item to determine which movement instruction table to use when selecting the From locations for replenishment.

Running the Random Location Replenishment Program (R461602)

To run the Random Location Replenishment program (R461402), select Replenishment Operations (G4613), Random Location Replenishment.

CHAPTER 12

Working with Advanced Features

This chapter provides overviews of advanced features and dimension and weight calculations, and discusses how to:

- Set up advanced features.
- Use advanced features.
- Set up manufacturing information.
- Set up technical information.

Understanding Advanced Features

The features described in Advanced Topics and Inquiries are not required to operate your warehouse. However, they provide enhanced flexibility in inventory movement and record keeping. With these features, you can:

- Generate detailed movement records by confirming movement out of one location and into another in two separate steps or two-phase processing
- Segregate tax-paid inventory in special locations according to tax codes that you assign
- Control locations by restricting the mixing of different dated products in the inventory in the location using freeze rules.
- Track an item by assigning special license plate tracking numbers
- Reduce the number of picking trips by combining (or rolling up) small units of measure into larger units during picking
- Protect your inventory by packing items in suitable storage containers during putaway
- Reduce warehouse traffic congestion and the effects of pick and putaway equipment failure by setting the maximum quantity for an item in a zone
- Changes the effect of movement instructions by changing an item's warehouse process groups
- Correct errors in system records by updating the Warehouse Suggestions (F4611), Item Location File (F41021), and Location Detail Information (F4602) tables with identical information
- Reorganize cartons within a shipment and items within cartons prior to shipment
- Merge location detail records to minimize system and user resources when processing these records
- Generate reports of location detail information (in unusual circumstances, such as system failure, when you need to reconstruct information)
- Generate reports of discrepancies between Item Location File (F41021) and Location Detail Information (F4602)

- Review the amount of space that is already used and the amount of space that is usable per location with the Location Utilization program (P46220) and the Location Detail Inquiry program (P46321)
- Purge closed requests, suggestions, tasks, and reservations

Understanding Dimension and Weight Calculations

The Warehouse Management system calculates each item's volume and weight to select a location during putaway. The system bases all volume and weight calculations on the Level 1 (largest) unit of measure and stores the resulting values in the Item Unit of Measure Definition table (F46011).

Weight for a Complete Level 1 Unit of Measure

The system performs the following calculation for items with storage containers:

$\text{Total Weight} = (\text{Gross Weight} + \text{Carton weight}) \times \text{Quantity}$

The system performs the following calculation for items without storage containers:

$\text{Total Weight} = \text{Gross Weight} \times \text{Quantity}$

Volume for a Complete Level 1 Unit of Measure

The system performs the following calculation for items with open storage containers:

$\text{Total Volume} = \text{Width} \times \text{Depth} \times \text{Height of the greater of container's and item's depth times the container height plus item height.}$

The system performs the following calculation for items with closed storage containers:

$\text{Total Volume} = \text{Width} \times \text{Depth} \times \text{Height of the container}$

The system performs the following calculation for items without storage containers:

$\text{Total Volume} = \text{Gross Volume} \times \text{Quantity}$

Weight for a Partial Level 1 Unit of Measure

The system performs the following weight calculations for a partial level 1 unit of measure:

$\text{Percentage Filled} = \text{Number of primary units of measure present P divided by the number of primary units of measure required to complete a Level 1 unit of measure}$

$\text{Total Weight} = \text{Weight of a Level 1 unit of measure} \times \text{Percentage Filled}$

Volume for a Partial Level 1 Unit of Measure

The system performs the following volume calculations for a partial level 1 unit of measure:

$\text{Percentage Filled} = \text{Number of Level 2 units of measure present P divided by the number of Level 2 units of measure required to complete a Level 1 unit of measure}$

$\text{Total Volume} = \text{Volume of a Level 1 unit of measure} \times \text{Percentage Filled}$

Setting Up Advanced Features

This section provides an overview of setting up advanced features, lists a prerequisite, and discusses how to:

- Set up two-phase movement confirmation.
- Assign tax codes.
- Set up freeze rules.
- Set up license plate tracking numbers.
- Set up rollup.
- Set up repack.
- Define maximum quantity by zone.

Understanding Advanced Feature Setup

Here are some advanced features of Warehouse Management.

Two-Phase Movement Confirmation

You use one-phase (default) movement to move inventory as one step, confirming after you move the items out of the From location and into the To location. You use two-phase movements to move inventory as two steps and performing confirmation:

- When you move the items out of the From location and into a Logical or Physical staging location
- When you move the items out of the Logical or Physical staging location and into the To location Final destination.

You might want to use two-phase movements if the warehouse contains narrow storage aisles and is equipped with automated tri-directional forklifts. First, warehouse personnel move the inventory from the receiving dock to the end of the storage aisle. Second, the warehouse personnel move the inventory onto shelves using the forklift.

You can use two-phase movements to generate reports for audit purposes that show the movement of items during each phase.

You can use either a physical (real) staging location or logical staging locations that exists only in the system's database. You use a logical staging location to generate separate transactions for movement out of the From location and into the To location without actually using a physical staging location.

You must set up two-phase movements for each item or item dimension group and for each From location or TO location for Putaway.

Tax Codes

Assign a tax code to a location to allow only items with the same tax code to be stored in that location. For example, if you have an item on which you have already paid tax, you can assign the same tax code to the item and to specific locations so that the system uses only those locations for putaway. You can use tax codes for import or export items.

Freeze Rules

A freeze rule determines how the system refills a pick location after picking. You can use a freeze rule to try and control your locations better (for cleaning, etc.) and/or restricting mixing of different dated product

You must set up the freeze rule for each location for which you want to restrict putaway after picking and during Picking suggestions.

License Plate Tracking Numbers

You can track large units of measure, such as a pallet, by assigning a license plate number when you create a movement request. For example, you can assign a license plate tracking number to a pallet of stereo equipment to locate it easily.

If you use license plate tracking for a particular item or unit of measure combination, the system generates one tracking number for each unit of measure of that item. You should use license plate tracking only for an item's Level 1 unit of measure (the largest in the unit of measure structure, such as a pallet).

Rollup

You can convert large units of measure into smaller units of measure during putaway.

You set up the unit of measure definition for an item or item group to use rollup and it only rolls up one UOM in the item structure. You also must set up your pick instructions to perform rollup.

Repack

You use repack to specify whether you want to pack items in new containers before you send them to storage. For example, if your inventory items arrive in containers that are not suitable for storage, you would repack the items during putaway.

Maximum Quantity by Zone

You can define a maximum quantity of items to store in a zone to prevent the zone from being dominated by one particular item. For example, if you were concerned about the risk of fire for a certain item, you would specify a maximum quantity of the item to minimize losses in the event of a fire. Alternatively, to minimize warehouse traffic for a zone that stores a popular item, you would limit the quantity of the popular item that you store in the zone.

Prerequisite

Verify that you have set up staging locations in the Location Profile program (P46020).

Forms Used to Set Up Advanced Features

Form Name	Form ID	Navigation	Usage
Item Profile Revisions	W460101A	Warehouse System Setup (G4641), Item Profile Revisions Click the Add button on the Work With Item Profiles form.	Set up two-phase movement confirmation. Assign tax codes.
Enter Location Profile Information	W46020C	Warehouse System Setup (G4641), Location Profile On the Work with Location Profiles form, select a record and select Enter Location Inf from the Form menu.	Set up freeze rules.
U/M Definition by Item Revisions	W46011B	Warehouse System Setup (G4641), U/M Definition by Item Click the Add button on the Work With U/M Definition by Item form.	Set up license plate tracking numbers. Set up rollup. Set up repack.
Maximum Putaway Quantity by Zone - Revisions	W46025B	Warehousing Movement Rules (G46311), Maximum Quantity by Zone Click the Add button on the Work With Maximum Putaway Quantities by Zone form.	Define maximum quantity by zone.

Setting Up Two-Phase Movements

Access the Item Profile Revisions form.

Overflow Location

A code that identifies the location that the system uses when an item cannot fit into the attempted putaway locations. You can monitor movement suggestions for the overflow location by accessing the audit report (P46175) or by inquiring on the location detail (F4602).

Variance Location

A code that identifies the location that the system uses when you confirm with variance a smaller quantity than the suggested quantity during any movement confirmation. You do this through Override Suggestion during any movement confirmation, where you enter a quantity that is smaller than the suggested quantity, and confirm with a variance to the suggested quantity. The system places the variance (remaining) quantity in the variance location.

Holding Location

A code that identifies the location that the system uses when you confirm a larger quantity than the suggested pick quantity during pick confirmation. You do this through Override Suggestion during pick confirmation, where you enter a quantity that is greater than the suggested quantity, and confirm with a overpick to the suggested quantity. The system places the overpick (extra) quantity in the holding location.

Base Putaway Location	A code that identifies the base putaway location that the system uses to calculate proximity when you specify base putaway proximity as the tiebreaker in a putaway instruction. If you use a tiebreaker that sequences locations according to base putaway proximity, the system ranks the locations based on their distance from this base putaway location. The system calculates distance based on the coordinates (longitude, latitude, and height) you defined in the location profile (P46020).
Base Picking Location	A code that identifies the base picking location that the system uses to calculate proximity when you specify base picking proximity as the tiebreaker in a picking (or putaway) instruction. If you use a tiebreaker that sequences locations according to base picking proximity, the system ranks the locations based on their distance from this base picking location. The system calculates distance based on the coordinates (longitude, latitude, and height) you defined in the location profile (P46020).
1 or 2 Phase Putaway	A code that indicates whether you use 1- or 2-phase movements during putaway. • 1-phase movements means the process is confirmed as one step after goods have moved from the starting location to the destination location. • 2-phase movements means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location. If you use 2-phase movements, you can specify whether the movements are logical or physical. • Logical 2-phase movements generate one document and does not indicate physical movement to the staging location. • Physical 2-phase movements generate two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location in the Location Profile. Valid codes are: <i>I</i>: Use 1-phase movements <i>L</i>: Use logical 2-phase movements <i>P</i>: Use physical 2-phase movements

Assigning Tax Codes

Access the Item Profile Revisions form.

Default Tax Code	A code (system 46/type LT) that indicates whether the item is tax-paid inventory (in-bond vs. duty paid). If an item has an assigned tax code, the system puts the item away only in locations with the same tax code. You assign tax codes to items through Item Profile (P46010) and in the Location Profile.

Setting Up Freeze Rules

Access the Enter Location Profile Information form.

Freeze Rule

A code that indicates what putaway restrictions you want to place on a location during the pick process. Valid codes are:

Blank: No freeze. The system does not perform any automatic restrictions.

1: Freeze when empty. Do not put away to this location after you pick the location empty.

Note. Restriction is placed on location at Pick Confirmation time if location becomes empty.

2: Freeze when picked (auto reset). Do not put away to this location after picking. When you pick the location empty, the system automatically resets the putaway flag to allow putaway to this location.

Note. Restriction is placed on location at Pick Suggestion time when the first Pick Suggestion is created to pick from the location.

Note. Reset occurs on the location at Pick Confirmation time if the location becomes empty.

3: Freeze when picked (manual reset). Do not put away to this location after picking. When you pick the location empty, you must manually reset the putaway flag to allow putaway to this location.

Note. Restriction is placed on location at Pick Suggestion time when the first Pick Suggestion is created to pick from the location.

Setting Up License Plate Tracking Numbers

Access the U/M Definition by Item Revisions form.

License Plate

A code that indicates whether you want the system to assign a tracking number to the specified item in this unit of measure when the system creates a request. This tracking number follows the item through the warehouse. License plate tracking is optional, and you should use it only for the level 1 (largest) unit of measure. Valid codes are:

Y: Yes, assign a tracking number to the item

N: No, do not assign a tracking number to the item

Setting Up Rollup

Access the U/M Definition by Item Revisions form.

Rollup

A code that indicates whether you allow rollup during picking. Valid codes are:

Y: Allow rollup

N: Do not allow rollup

Setting Up Repack

Access the U/M Definition by Item Revisions form.

Repack

A code that determines whether the specified item in this unit of measure should be repacked before putaway. Valid codes are:

Y: Yes, repack the item

N: No, do not repack the item

You must also specify a packing method by entering a code in the Default Pack Code field.

Defining Maximum Quantity by Zone

Access the Maximum Putaway Quantity by Zone - Revisions form.

Using Advanced Features

This section provides an overview of using advanced features and discusses how to:

- Work with item dimension and warehouse process groups.
- Repost open location suggestions.
- Manage location detail information.
- Compare inventory and warehouse item balance.
- Create location detail information from existing inventory data.
- Review location utilization and detail information.
- Purge closed requests, suggestions, tasks, and reservations.

Understanding Advanced Feature Use

Here is some important information when using advanced features.

Item Dimension and Warehouse Process Groups

You can quickly review or change an item's dimension group or warehouse process group. By changing the process groups for an item, you can change which movement instruction table that you use, which can change the putaway, picking, or replenishment location that you use during inventory movements.

Also, if you are running a batch version of the Warehouse Speed Group Maintenance program (P4690), make sure that the batch job has completely finished processing before you run the Location Selection Driver program (R46171). If you run the Location Selection Driver program before the batch job is finished processing, the results of the process selection might be inaccurate. To determine whether the batch job is finished, review the process groups on the Speed Group Maintenance form or in the Category Codes of the Item Branch application and verify whether the process groups have changed. If they have not changed, the batch job has not finished processing.

Note. If you are changing large quantities of process groups for an item, ensure that you allow adequate processing time.

Repost Open Suggestions

An open suggestion selects a location for an item based on the total quantity, volume, or weight of the item. The system creates open suggestions for items you have posted putaway, picking, or replenishment suggestions but for which you have not confirmed the movement. You repost open location suggestions in the event that the location suggestion information in the Item Location, Location Detail Information, and Warehouse Suggestions tables does not match.

When you run the Repost Open Suggestions program (R46995), the system:

- Examines the suggestions in Warehouse Suggestions (F4611)
- Updates the suggestion commitment information in Item Location File (F41021)
- Updates the inbound quantity, outbound quantity, reserved cubes, and reserved weight in Location Detail Information (F4602)

Note. It also updates Hard Commitment Quantity depending on the type of Movement Suggestion that is being reposted.

Location Detail Information

You can review and change information in the Location Detail Information table (F4602). You might perform this procedure after a system failure when you need to reconstruct information about locations.

Note. PeopleSoft recommends that you limit the use and access of this program. If you change information in the Location Detail Information table, you must also update the Warehouse Requests and Warehouse Suggestions tables to avoid mismatched information and unpredictable inventory movements.

Inventory and Warehouse Item Balance Comparison

When you perform a cycle or tag count of items in selected locations in your inventory, the system records the variance between the expected on-hand quantity and the quantity determined from a physical count of the inventory. The system uses this information to update Item Location File (F41021) records and Location Detail Information (F4602) records. If you record a negative variance (missing inventory), the system subtracts this variance from existing records and can make both sets of records negative. In the cycle or tag process, the system can also create discrepancies between these records.

The Warehouse Location Integrity program (R46990) generates a report that compares the warehouse and inventory records for all locations and items, and displays imbalances between the records. You can set processing options to specify the type of imbalance that you want to display.

Build Location Detail Information Program (R46820)

The system administrator or other qualified personnel should run this batch program only once during initial system setup. Using this program on a regular basis can be detrimental to the way that you have set up warehouse information, such as unit of measure structure and location utilization.

Use the Build Location Detail Information (R46820) program to create the Location Detail Information table (F4602) with information from existing records in the Item Location File table (F41021). Typically, you run this program when you already use the Inventory Management system and want to begin using the Warehouse Management system. This program builds records in Warehouse Management using the records in the Inventory Management system.

If the Build Location Detail Information program has already been run during initial system setup and you find a discrepancy between the Inventory Management records and Warehouse Management records, run the Warehouse Location Integrity program to identify the cause of the discrepancy before running the Build Location Detail Information program. The system administrator or other qualified personnel might need to run this program again. However, you should thoroughly investigate the cause of the discrepancies before using the Build Location Detail Information program to reconcile records.

When you run the Build Location Detail Information program, the system either rebuilds or adds location detail information based on the quantity values in the Item Location File table. You may apply the item's default structure using a processing option.

Location Utilization and Detail Information

The Location Utilization program (P46220) allows you to review the amount of space that is already used and the amount of space that is usable for locations in your warehouse. The system displays the space by cubic inches and, for each location, shows the utilization percentage.

You also can access detailed information about the contents of a location by using the Location Detail Inquiry program (P46321). You can access this inquiry either through choosing a row exit on the Work with Location Utilization form or through the menu selection, Location Detail Inquiry, which is also on the Outbound Warehousing Operations menu (G4612).

Note. The License Plate enhancement application reviews the used and available capacity of locations, just like this application does.

Purge Movement Information

After you create requests, suggestions, tasks, and reservations, the system stores the information in tables with size that can consume storage space and increase processing time for all transactions that exchange information with the tables. You use the WMS Purge Movement Information program (R4600P) to purge information that you no longer need from the following tables:

- Warehouse Requests (F4600)
- Warehouse Suggestions (F4611)
- Warehouse Requests Tag File (F4600T)
- Warehouse Suggestions Tag File (F4611T)
- Warehouse Task Header (F4601)
- Putaway Reservations (F46130)
- Bulk Pick Requests (F46200)

The WMS Purge Movement Information program (R4600P) searches all of the information in the table that you specify and purges only the information for which processing has been completed. A request and its suggestions must meet all of the following criteria before they can be purged:

- Requests must be closed or canceled.
- Associated suggestions must be confirmed or canceled.
- Associated tasks must be completed or canceled.
- Associated reservations must be confirmed or canceled.

For tasks that are shared by several work orders, such as work order completions putaway requests, you specify the work order status at which you can purge the task. A task must meet the following criteria before it can be purged:

- All requests and suggestions that are associated with the task are closed, complete, or canceled.
- The work order header that is associated with the task meets the status requirement that you specify.

When you run the WMS Purge Movement Information program (R4600P), the system allows you to choose the requests to be purged. The system also automatically displays processing options that you can use to run the program in proof or final mode. If you run the program in proof mode, the system generates a report that allows you to review the information that the system will purge. You can review this report before you run the program in final mode.

When you run the program in final mode, the system permanently removes the information from the tables that you specified, but you can save the purged information to special purge tables. To save purged information, you set a processing option to store the purged information in the following tables:

- F4600PU (Warehouse Requests - Purged)
- F4611PU (Warehouse Suggestions - Purged)
- F4600TPU (Warehouse Requests Tag File - Purged)
- F4611TPU (Warehouse Suggestions Tag File - Purged)
- F4601PU (Warehouse Task Header - Purged)
- F46130PU (Putaway Reservations - Purged)
- F46200PU (Bulk Pick Requests - Purged)

After you run the program in final mode, the system generates a report that lists all requests, suggestions, tasks, and reservations that were not purged and the reason that the system did not purge them. The report also lists the total number of requests, suggestions, tasks, and reservations that were and were not purged.

Forms Used to Use Advanced Features

Form Name	Form ID	Navigation	Usage
Update Groups	W4690C	Warehouse System Setup (G4641), Speed Group Maintenance On the Work With Speed Group Maintenance form, select Copy Process Groups from the Form menu.	Work with item dimension and warehouse process groups. Run the Speed Group Maintenance program in either batch or interactive mode.
Location Detail Maintenance	W4602A	Advanced & Technical Ops (G4631), Location Detail Maintenance Click the Add button on the Work With Location Detail Maintenance form.	Manage location detail information.
Work with Location Utilization	W46220C	Outbound Warehousing Operations (G4612), Location Utilization	Review location utilization and detail information.
Work with Location Details	W46321A	On the Work With Location Utilization form, select Detail from the Row menu.	Review location utilization and detail information.

Working with Item Dimension and Warehouse Process Groups

Access the Update Groups form.

Speed Group Maintenance - Update Groups

OK Cancel Tools

Item Number

Branch / Plant

Update Groups

☐ Process Group 1 Check

☐ Process Group 2 Check

☐ Process Group 3 Check

☐ Item Dimension Check

Execution Mode

☒ Batch Mode ☒ Summary Report ☐ Detailed Report ☐ Interactive Mode ☐ Suppress Output

Update Groups form

Reposting Open Location Suggestions

To repost open location suggestions, select Advanced & Technical Ops (G4631), Repost Open Suggestions.

Managing Location Detail Information

Access the Location Detail Maintenance form.

Comparing Inventory and Warehouse Item Balance

To compare inventory and warehouse item balance, select Warehousing Inquiries & Reports (G4614), Warehouse Location Integrity.

See Also

Processing a Cycle Count in the Inventory Management Guide

Processing a Tag Count in the Inventory Management Guide

Creating Location Detail Information from Existing Inventory Data

To create location detail information from existing inventory data, select Advanced & Technical Ops (G4631), Build Location Detail Information.

See Also

Processing a Cycle Count in the Inventory Management Guide for more information on how to use a cycle count to resolve discrepancies

Reviewing Location Utilization and Detail Information

Access the Work With Location Utilization and Work With Location Details forms.

Location Utilization - Work with Location Details

Location: . . . Branch/Plant: 27

Used Cubes	359.00	FC	Used Weight	1,230.00	LB
Reserved Cubes		FC	Reserved Weight		LB
Available Cubes	-359.00	FC	Available Weight	-1,230.00	LB

Item Number	Total Quantity	UM	Dual Quantity	Dual UM	Cubes	Weight	License Plate UM	License Plate	Quantity Hard Committed
2200	150	EA			7.00	150.00	PL	140	
2017	100	EA			44.00	100.00			
2017	110	EA			44.00	110.00			
2017	120	EA			44.00	120.00			
2017	130	EA			44.00	130.00			
2017	140	EA			44.00	140.00			
2017	150	EA			44.00	150.00			
2017	160	EA			44.00	160.00			
2017	170	EA			44.00	170.00			

Work with Location Details form

Usable

The actual cubic volume that you can use for storage in a location. You define usable location space through Location Dimensions (P46022), and assign it to individual locations using Location Profile Detail (P460201). The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).

Usable Available

The cubic space (volume) already used in a location. The system uses item dimensions and storage container dimensions to determine used cubic space if the level 1 unit of measure for the item in this location detail has a container.

Utilized Percentage

Results in a calculation.

Used Cubes

The cubic space (volume) already used in a location. The system uses item dimensions and storage container dimensions to determine used cubic space if the level 1 unit of measure for the item in this location detail has a container.

Reserved Cubes

The cubic space (volume) that has been reserved for items. You use the Reservations program (P46130) to create reservations. The system suggests

	reserved locations when you create suggestions. The amount comes from the item/unit of measure profile and the cubic dimensions of the storage container if the level 1 unit of measure in the location detail has a container.
Available Cubes	The cubic space (volume) already used in a location. The system uses item dimensions and storage container dimensions to determine used cubic space if the level 1 unit of measure for the item in this location detail has a container.
Used Weight	The weight of goods currently in a location. The system calculates this amount from the weight from the item/unit of measure profile and the weight of the container if the level 1 unit of measure for this location detail has a storage container.
Reserved Weight	The weight that has been reserved for items in this location. The system creates reserved weight when you use the Reservations program (P46130) to reserve space in the warehouse for items you expect to receive. The amount comes from the item/unit of measure profile and the weight for the storage container if the level 1 unit of measure in the location detail has a container.
Available Weight	The weight of goods currently in a location. The system calculates this amount from the weight from the item/unit of measure profile and the weight of the container if the level 1 unit of measure for this location detail has a storage container.

Purging Closed Requests, Suggestions, Tasks, and Reservations

To purge closed requests, suggestions, tasks, and reservations, select Advanced & Technical Ops (G4631), Purge Movement Information.

Setting Up Manufacturing Information

This section provides an overview of manufacturing information, and discusses how to:

- Create the parts list interactively.
- Create the parts list by batch.
- Identify ineligible items.
- Set processing options for Work Order Completions (P31114).
- Set processing options for Super Backflush (P31123).
- Set processing options for Completions Workbench (P3119).

Understanding Manufacturing Information

You can create putaway requests and pick requests within the Warehouse Management system. You also can create pick requests and putaway requests using manufacturing systems.

Pick Requests through Manufacturing Systems

You can set up your manufacturing system so that the creation of a parts list triggers the creation of a pick request for the necessary parts.

Some items that are used in the manufacturing process might be out of stock temporarily, so they are not eligible for picking. You can choose to identify the items that are ineligible for picking to avoid creating a pick request for those items.

After you create a pick request through manufacturing systems, you process the pick request normally through the Warehouse Management system. After you create and confirm location suggestions, you also update the parts list in the manufacturing systems. Finally, you reduce the on-hand quantity in the From location and increase the on-hand quantity in the manufacturing area's To location where manufacturing employees retrieve the parts and build the product.

The system identifies manufacturing pick requests as originating from a work order instead of the usual sales order.

Parts List

To create a pick request through manufacturing systems, you must create a parts list that identifies the items to pick. You can create a parts list:

- Interactively, through work order entry
- By batch, with an order processing program

Interactive Method

As you enter a work order, you can also identify the parts to include in the work order parts list. You use this method if you have not already defined the product's component parts or if the product must contain non-standard items.

Batch Method

You create a parts list by batch with the Order Processing program (R31410). You typically run the batch program during off-peak hours when more system resources are available.

Ineligible Items

You can skip certain items, such as items that are out of stock temporarily, when you create pick requests from a manufacturing parts list. You can choose to identify the items that are not eligible for picking to avoid creating a pick request for them. The system still prints the ineligible item on the parts list. However, you do not process the item in the Warehouse Management system for this particular order.

Processing Options in Manufacturing Programs

To create picking requests through manufacturing programs, set the processing options for one or both of the following programs:

- Order Processing (R31410)
- Manufacturing Work Order Processing (P48013)

You can check for item availability when you create a pick request.

If the item is attached to a work center, the system does not create a pick request if a sufficient quantity of the item exists in the work center to complete the work order.

The system does create a pick request if there is not enough quantity of the item in the work center to complete the work order. The system splits the parts list line into a commitment for the amount that is available in the work center and a soft commitment for the unavailable quantity. You specify in Manufacturing Constants (P3009) whether the commitment for the work center quantity is hard (committed to a specific location) or soft (committed to the item's primary location).

If the item is not attached to a work center and if you have set the manufacturing order entry program's processing options to check the staging location for item availability, the system does not create a pick request if a sufficient quantity of the item exists in the staging location to complete the work order.

The system creates a pick request if there is not enough quantity of the item in the staging location to complete the work order. The system creates a hard or soft commitment to the default staging location that you specified in the processing options. If you did not specify a default staging location, the system creates a soft commitment to the item's primary location.

Putaway Requests through Manufacturing Systems

You can set up your manufacturing systems so that the completion of a work order triggers the creation of a putaway request for the manufactured product.

After you create a putaway request through your manufacturing systems, you process the putaway request normally through the Warehouse Management system. After you create and confirm location suggestions, you reduce the on-hand quantity in the manufacturing location and increase the on-hand quantity in the putaway location where you will store the item.

Forms Used to Set Up Manufacturing Information

Form Name	Form ID	Navigation	Usage
Work Order Parts List	W3111A	Daily Order Preparation - Discrete (G3111), Enter/Change Order On the Work With Manufacturing Work Orders form, select a row and select Parts List from the Row menu.	Create the parts list interactively. Identify ineligible items by reviewing the Material Status field.
Additional System Information	W4101C	Warehouse System Setup (G4641), Item Master On the Work With Item Master Browse form, select a record and select Addl System Info from the Row menu.	Identify ineligible items.

Creating the Parts Lists Interactively

Access the Work Order Parts List form.

Component Item No	The short identifier for the component item number.
Order Quantity	The quantity of units affected by this transaction.
UM	A user defined code (00/UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

Creating the Parts List by Batch

To create the parts list by batch, select Daily Order Preparation - Discrete (G3111), Order Processing.

See Also

Entering Kit Information in the Inventory Management Guide for more information about assigning parts to manufacturing products

Setting Processing Options in Manufacturing Programs in the Warehouse Management Guide for more information about creating a parts list by batch

Identifying Ineligible Items

Access the Additional System Information form.

Item Master - Additional System Information

Work With Item Master Browse Additional System Information

OK Cancel Form Previous Next Tools

Item Number (Short) 60003

Item Number 1001 Bike Rack - Trunk Mount

Manufacturing Data Grade and Potency Service/Warranty Bulk Information Advanced Planning

Order Policy Code 1 Lot for Lot, As

Value Order Policy

Planning Code 2 Planned by Mfg

Planning Fence Rule

Planning Fence

Freeze Fence

Message Display Fence

Accounting Cost Qty 1

Issue Type Code 1 Manual Issue

Round to Whole Number Do Not Round

Issue and Receipt 0 No Action Taken

Replenishment Hours

☐ Active Ingredient

☐ Kanban Item

Drawing Size

Last Revision No

Drawing Number

MFG Leadtime Quantity

Leadtime Level

Leadtime Manufacturing

Leadtime Per Unit

Leadtime Cumulative

Fixed/Variable F Fixed Leadtime

Material Status

Additional System Information form

Material Status

A code (table 31/MS) that designates the status of an item.

Setting Processing Options for Work Order Completions (P31114)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

These processing options determine the default document types the program uses when you complete inventory.

1. Inventory Completion Document Type	Use this processing option to specify the default document type for inventory completions. Select the document type from UDC 00/DT (Document Type - All Documents).
2. Inventory Scrap Document Type	Use this processing option to specify the default document type for inventory scrap transactions. Select the document type from UDC 00/DT (Document Type - All Documents).

Edits

These processing options determine how the system processes work orders.

1. Backflush	Use this processing option to specify whether the system issues material to the Parts List based on the quantity that is completed. You can also specify whether the system issues material in interactive mode or blind mode. If the processing option is set to 1 or 2, you need to specify the version of the Work Order Inventory Issues program (P31113) on the Versions tab. Values are: <i>Blank:</i> The system does not issue material to the Parts List. <i>1:</i> The system displays the Work Order Issues form. <i>2:</i> The system performs a blind execution of Work Order Issues.
2. Receipt Routing	Use this processing option to specify whether the system initiates the receipt routing process. This action allows the inventory completion to enter an inspection mode before the quantity is moved to stock. To activate receipt routing for an item, the item must have a route assigned to it through the Supplier/Item Relationships program (P43090). The supplier for the manufactured end-item must be listed as -99999999. Values are: <i>Blank:</i> The system does not initiate receipt routing. <i>1:</i> The system initiates receipt routing.
3. Override Lot Numbers	Use this processing option to specify whether the system allows you to override the lot number. If you leave this processing option blank and you have performed no other completions for the work order, the lot number field is unprotected. If you have performed any completions for the work order, the system protects the lot number field. It uses the lot number for the first completion of that work order and for all other partial completions. However, if you set this processing option to 1, you can override the lot number even if you have already performed a partial completion for the work order. Values are:

Blank: The system does not allow you to override the lot number.

1: The system allows you to override the lot number.

4. Negative Quantity on Hand

Use this processing option to specify whether the system displays an error message when the completed material sets the on-hand quantity to a negative amount. Values are:

Blank: The system does not display an error message for negative on-hand quantities.

1: The system displays an error message for negative on-hand quantities.

5. Enter a '1' to initiate WIP Revaluation (R30837)

Use this processing option to specify whether the system calls the WIP Revaluation program (R30837) to adjust work-in-progress amounts to reflect cost changes. Values are:

Blank: Do not initiate WIP Revaluation.

1: Initiate WIP Revaluation.

WO Status Codes

These processing options determine the statuses that the system uses to process work orders.

1. Partial Work Order Status Code

Use this processing option to specify the status code that you want the system to assign to a partially completed order. The system considers an order partially complete as long as the completed quantity is less than the percentage that is specified in the completion threshold processing option. If you leave this processing option blank, the system does not automatically update the status.

2. Completed Status Code

Use this processing option to specify the status code that the system assigns to a completed order. If you leave this processing option blank, the system does not automatically change the status. The system considers an order complete if the completed quantity is greater than or equal to the percentage that is specified in the Completion Threshold processing option.

3. Completion Threshold

Use this processing option to specify the threshold percentage at which the system considers the order to be complete. For example, if you enter 95, the system sets the work order status to complete when 95 percent of the order quantity is complete. If you specify a threshold value of zero, the system sets the work order status to complete when 100 percent of the order quantity is complete. If the completed quantity does not reach the threshold, the system sets the work order status to partially complete. If a related sales order is attached or the work order is cross-docked, any threshold less than 100 percent is ignored.

4. Work Order Status Limit

Use this processing option to specify the work order status code (00/SS) at or beyond which the system cannot run the Work Order Completions program (P3114). For example, if this processing option is set to status 95 and a work order has reached this status, the system generates an error message if you attempt to run Completions for that work order. If you leave this processing option blank, the system processes work orders at any status.

Lot Hold Codes

These processing options determine the lot hold codes in which the program allows a completion to. You can enter up to five lot hold codes.

If you enter an asterisk, the program allows completions to all held lots. And, if you leave these fields blank, the program does not allow completions to any held lots.

- 1. Backflush** Use this processing option to specify one of five lot hold codes to which the system processes completions. Enter a hold code, an asterisk, or leave this field blank. If you enter a hold code, the system processes completions to that hold code. If you enter an asterisk, the system processes completions to all held lots. If you leave this field blank, the system does not process completions to any held lots.
- 2. Receipt Routing** Use this processing option to specify one of five lot hold codes to which the system processes completions. Enter a hold code, an asterisk, or leave this field blank. If you enter a hold code, the system processes completions to that hold code. If you enter an asterisk, the system processes completions to all held lots. If you leave this field blank, the system does not process completions to any held lots.
- 3. Override Lot Numbers** Use this processing option to specify one of five lot hold codes to which the system processes completions. Enter a hold code, an asterisk, or leave this field blank. If you enter a hold code, the system processes completions to that hold code. If you enter an asterisk, the system processes completions to all held lots. If you leave this field blank, the system does not process completions to any held lots.
- 4. Negative Quantity on Hand** Use this processing option to specify one of five lot hold codes to which the system processes completions. Enter a hold code, an asterisk, or leave this field blank. If you enter a hold code, the system processes completions to that hold code. If you enter an asterisk, the system processes completions to all held lots. If you leave this field blank, the system does not process completions to any held lots.
- 5. Enter a '1' to initiate WIP Revaluation (R30837)** Use this processing option to specify one of five lot hold codes to which the system processes completions. Enter a hold code, an asterisk, or leave this field blank. If you enter a hold code, the system processes completions to that hold code. If you enter an asterisk, the system processes completions to all held lots. If you leave this field blank, the system does not process completions to any held lots.

Sales Orders

These processing options define the information needed to process completions associated with sales orders.

- 1. Partial Work Order Status Code** Use this processing option to specify which number the system uses for the completion lot number and the completion location. Values are:
 - 1: The system uses the sales order number as the completion lot number.
 - 2: The system uses the sales order number as the completion location and the sales order line number as the completion lot number.
 - 3: The system uses the work order number as the completion lot number.
- 2. Completed Status Code** Use this processing option to specify whether the system updates the related sales order by committing the inventory to the related sales order, splitting the sales order detail line when a partial completion occurs, and updating the lot number and location number fields from the work order. Values are:

- Blank:* Do not update the sales order.
I: Update the sales order.
- 3. Update Sales Order Next Status** Use this processing option to specify whether the system updates the Next Status for the sales order. Values are:
Blank: The system does not update the Next Status.
I: The system updates the Next Status.
- 4. Override Next Status** Use this processing option to specify the default next status code for the sales order. The system uses this processing option only if the Update Sales Order Next Status processing option is set to update.
 Enter a status code from UDC 40/AT (Activity/Status Codes). If you leave this processing option blank, the system uses the sales order next status from the order activity rules.

Process Mfg

These processing options determine whether unplanned completions with co- and by-products are allowed and if you want to issue them separately or together.

- 1. Lot Hold Code # 1** Use this processing option to specify whether the system processes completions of unplanned co-products and by-products. Values are:
Blank: The system does not process completions of unplanned co-products and by-products.
I: The system processes completions of unplanned co-products and by-products.
- 2. Lot Hold Code # 2** Use this processing option to determine if ingredients are issued to the process item or to each co- or by-product that the system completes. This processing option is used only if the Backflush option is set to call the Work Order Inventory Issues program (P31113). Values are:
Blank: The system issues ingredients to the process item.
I: The system issues ingredients to co- and by-products.

Note. If you choose 1, you can track lots to the final end product.

Serial Numbers

These processing options determine how the program processes serial numbers.

- 1. Allow Duplicate Lot Serial Numbers** Use this processing option to specify whether the system duplicates lot numbers, serial numbers, or both, that exist in the system. Values are:
Blank: The system does not duplicate lot numbers or serial numbers.
I: The system duplicates lot numbers and serial numbers.
- 2. Document Type** Use this processing option to specify the default document type that the system uses for serial number issues. Document types are listed in UDC 00/DT (Document Type - All Documents). If you leave this processing option blank, the system uses IM (Material Charged to W.O.'s) as the default value.

Warehouse Mgt

These processing options determine how the program processes putaway requests for Warehouse Management integration.

1. Work Order Lot and Location Defaults

Use this processing option to specify whether putaway requests will be processed. For mode 2, you need to specify the version of the subsystem program that the system uses in the Location Selection Driver processing option (R46171) on the Versions tab. Values are:

Blank: The system does not process putaway requests.

1: The system processes putaway requests only.

2: The system processes putaway requests when it accesses the subsystem.

2. Entry of license plate numbers

Use this processing option to specify whether the system assigns license plate numbers automatically or allows you to specify the value. You use this processing option only if you enable license plate functionality at the Item/Branch level by using the Item Unit of Measure Definition program (P46011). Values are:

Blank: License plate numbers are assigned automatically.

1: License plate numbers are assigned manually.

Cross Docking

These processing options determine how the program processes cross docking orders.

1. Cross Docking

Use this processing option to specify whether the system performs opportunistic cross-docking, planned cross-docking, or both. The system performs planned cross-docking only for items for which the cross-docking code is activated in the item branch/plant record. Values are:

Blank: Do not use cross-docking.

1: Use opportunistic cross-docking (only for warehouse items).

2: Use planned cross-docking.

3: Use both opportunistic and planned cross-docking.

2. Pick Request for Planned Cross Docking

Use this processing option to specify whether the system creates a pick request when it performs planned cross-docking. Values are:

Blank: Do not create a pick request.

1: Create a pick request.

2: Create a pick request and process it through the subsystem.

3. Override Next Status for Sales Orders

Use this processing option to specify the default next status code for the sales order. The system uses this processing option only if planned cross-docking is performed.

Enter a status code from UDC 40/AT (Activity/Status Codes). If you leave this processing option blank, the system uses the sales order next status from the order activity rules.

- 4. From Sales Order Status** Use this processing option to specify the from status code of the sales order for cross-docking during work order completions. The system uses this processing option only if planned cross-docking is performed.
- 5. Thru Sales Order Status** Use this processing option to specify the thru status code of the sales order for cross-docking during work order completions. The system uses this processing option only if planned cross-docking is performed.

Versions

These processing options identify the versions of the Shortage Workbench, Work Order Entry, and Test Results Revisions programs that are used in the completion process.

- 1. Work Order Entry (P48013)** Use this processing option to specify the version you want to use when calling the Work Order Entry program (P48012) from the Work Order Completion Detail form. The version controls how the program displays information. If you leave this processing option blank, the system uses version ZJDE0001.
- 2. Work Order Issues Version (P31113)** Use this processing option to specify the version of the Work Order Issues program that the system uses. The system only requires this processing option when Work Order Issues is set to execute.

If you leave this field blank, the system uses the ZJDE0001 version of the program. This version controls how the Work Order Issues program displays information.
- 3. Test Results Revisions (P3711)** Use this processing option to specify the version that you want to use when calling the Test Results Revisions program (P3711) from the Work Order Completion Detail form. The version controls how the program displays information. If you leave this processing option blank, the system uses version ZJDE0001.
- 4. WIP Revaluation (R30837)** Use this processing option to specify which version of the WIP Revaluation program (R30837) the system uses. If you leave this processing option blank, the system uses version ZJDE0001.
- 5. Pick Request Version (R46171)** Use this processing option to specify the version of the Location Selection Driver program (R46171) that the system uses to create pick requests during planned cross-docking. If you leave this processing option blank, the system uses version ZJDE0001.
- 6. Location Selection Driver Version (R46171)** Use this processing option to specify the version of the Location Selection Driver program (P46171) to use. If you leave this processing option blank, the system uses version ZJDE0001. The version controls how the program displays information.
- 7. Back Order Release Version (P42117)** Use this processing option to specify the version of the Backorder Release program (P42117) that the system uses to complete inventory with backordered items. The version controls how the Back Order Release program displays information. Enter a version if the Display Back Order Release Form processing option on the Sales Orders tab is set to 1. If you leave this processing option blank, the system uses version ZJDE0001.
- 8. Shortage Workbench (P3118)** Use this processing option to specify the version that you want to use when calling the Shortage Revisions program (P3118) from the Work Order Completion Detail form. The version controls how the program displays

information. If you leave this processing option blank, the system uses version ZJDE0001.

Interop

These processing options allow you to specify the interoperability transaction type that the system uses and whether to call an outbound system.

1. Cross Docking	Use this processing option to specify the transaction type that the system uses for outbound interoperability processing. Transaction types are listed in UDC 00/TT (Transaction Type). The system assigns a transaction type to a transaction when it completes a work order. If you leave this processing option blank, the system does not perform outbound interoperability processing.
2. Pick Request for Planned Cross Docking	Use this processing option to specify whether the system activates the subsystem after the Work Order Completions program (P31114) has successfully processed an outbound transaction. Values are: <i>Blank:</i> The system does not activate the subsystem. <i>1:</i> The system activates the subsystem.
3. Work Order Header Before Image	Use this processing option to specify whether the system writes the before image for the work order header. Values are: <i>1:</i> The system includes the image. <i>Blank:</i> The system does not include the image.

Setting Processing Options for Super Backflush (P31123)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

Use these processing options to specify the defaults that the system will use.

1. Operation Status for Partial Completions.	Use this processing option to specify the default operation status for a line when the quantity is partially completed at this operation step in the routing.
2. Operation Status Code for Full Completions.	Use this processing option to specify the default operation status at the point when the quantity is fully complete.
3. Work Order Status Code	Use this processing option to specify the default status code for the work order header that the system updates after a super backflush transaction. This value always supersedes any status set by Work Order Inventory Issues (P31113), Work Order Time Entry (P311221), or Work Order Completions (P31114) programs.

4. Employee Number

Use this processing option to specify an employee number (AN8) that the system uses as the default value for the detail area on the Super Backflush form. If you leave this processing option blank, The Employee Number field in the detail area remains blank.

5. Shift Code

Use this processing option to specify a shift code that the system uses as the default value in the header area on the Super Backflush form. If you leave this processing option blank, the Shift Code field in the header area remains blank.

Process

Use these processing options to specify how the system processes work order completions.

1. Work Order Completions

Use this processing option to specify how the Super Backflush program (P31123) processes work order completions. If completions are processed blindly, the Super Backflush program completes the quantity that is specified on the Super Backflush grid. If you plan to complete quantities to different locations, lot or serial numbers, then process the Work Order Completions program (P31114) in interactive mode. Values are:

Blank: The program calls the Work Order Completions program for interactive processing.

I: The program blindly processes work order completions.

2. Work Order Issues

Use this processing option to specify how Super Backflush (P31123) processes inventory issues for work orders. If the Work Order Inventory Issues program (P31113) is executed blindly, the Super Backflush program issues the quantity that is specified on the Super Backflush grid, according to the issue type code. If you plan to issue quantities other than the standard calculated quantity, then process the Work Order Inventory Issues program (P31113) in interactive mode. Values are:

Blank: The program calls the Work Order Inventory Issues program for interactive processing.

I: The program blindly processes inventory issues to work orders.

3. Hours and Quantities Form

Use this processing option to specify how the Super Backflush program (P31123) processes hours and quantities transactions. If the hours and quantities transactions are processed blindly, the Super Backflush program creates standard transactions in the Work Order Time Transactions table (F31122). If you plan to enter additional hours and quantities other than the standard amount, then process the Work Order Time Entry program (P311221) in interactive mode. Values are:

Blank: The program calls the Hours and Quantities program for interactive processing.

I: The program blindly processes hours and quantities transactions.

4. Apply Yield to Completed Quantity

Use this option to specify whether the system applies the operation yield percentage to the quantity that the user completes at an operation. The yield percentage determines the scrap quantity. Values are:

Blank: The system does not apply the operation yield percent to the quantity completed.

I: The system applies the operation yield percent to the quantity completed.

Edits

Use these processing options to specify whether the system validates the quantity at operation and to identify the work order status limit.

1. Validate Quantity at Operation	Use this processing option to validate that the quantity completed plus the quantity scrapped does not exceed the quantity at operation. Values are: <i>Blank:</i> The system does not validate quantities at operation. <i>I:</i> The system validates quantities at operation.
2. Work Order Status Limit	Use this processing option to specify the work order status code (00/SS) at or beyond which the system cannot run the Super Backflush program. For example, if this processing option is set to 95 and a work order has reached a status of 95, then the system generates an error message if you attempt to run Super Backflush on that work order.

Versions

Use these processing options to specify which version the system will use for each program.

1. Enter Version for the Following Programs.	If blank, version ZJDE0001 will be used.
2. Work Order Issues (P31113)	Use this processing option to specify which version of the Work Order Inventory Issues program (P31113) that the system uses to report material which is issued from inventory to a work order. If you leave this processing option blank, the system uses version ZJDE0001.
3. Work Order Completions (P31114)	Use this processing option to specify which version of the Work Order Completions program (P31114) that the system uses to complete manufacturing items from a work order to inventory. If you leave this processing option blank, the system uses version ZJDE0001.
4. Test Results Revisions (P3711)	Use this processing option to specify which version of the Test Results Revisions program (P3711) that the system uses when you call this program from the Super Backflush form. If you leave this processing option blank, the system uses version ZJDE0001.
5. Scheduling Workbench (P31225)	Use this processing option to specify which version of the Manufacturing Scheduling Workbench program (P31225) that the system uses when you call the program from the Super Backflush form. If you leave this processing option blank, the system uses version ZJDE0001.
6. Work Order Entry (P48013)	Use this processing option to specify which version of the Work Order Entry program (P48012) that the system uses when you call this program from the Super Backflush form. If you leave this processing option blank, the system uses version ZJDE0001.

Interop

Use these processing options to specify the transaction type and whether the system includes the Work Order Header Before Image.

1. Work Order Transaction Type	Use this processing option to specify the default transaction type for the work order header that the system uses when processing export transactions.

If you leave this processing option blank, the system does not perform export processing.

2. Work Order Header Before Image

Use this processing option to specify whether the system writes the before image for the work order header. Values are:

I: The system writes the before image.

Blank: The system does not write the before image.

Setting Processing Options for Completions Workbench (P3119)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults

1. Enter the Schedule Type. Default value is 'SC'

A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. PeopleSoft has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)

The following document types are defined by PeopleSoft and should not be changed:

- *P*: Accounts Payable documents
- *R*: Accounts Receivable documents
- *T*: Payroll documents
- *I*: Inventory documents
- *O*: Purchase Order Processing documents
- *J*: General Accounting/Joint Interest Billing documents
- *S*: Sales Order Processing documents

2. Enter the Employee Number (Optional)

A number that identifies an entry in the Address Book system, such as employee, applicant, participant, customer, supplier, tenant, or location.

3. Enter the Production Line (Optional)

A number that defines a production line or cell. Detailed work center operations can be defined inside the line or cell.

4. Enter the Number of Days to Add to the From Date for the Thru Date (Optional)

Results in a calculation.

5. Enter the Status From (Optional)	User defined code system 00, type SS, that describes the status of a work order. Any status change from 90 thru 99 automatically updates the date completed.
6. Enter the Status Thru (Optional)	User defined code system 00, type SS, that describes the status of a work order. Any status change from 90 thru 99 automatically updates the date completed.
7. Enter the status code to use when closing rates. Default value is '99'	A user defined code (00/SS) that describes the status of a work order, rate schedule, or engineering change order. Any status change from 90 through 99 triggers the system to automatically update the completion date.

Versions

Enter the version for each program. If left blank, 'ZJDE0001' will be used.

Use these processing options to enter the version for each program.

1. Super Backflush (P31123)	A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.
2. Hours and Quantities (P311221)	A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.
3. Material Issues (P31113)	A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.
4. Enter/Change Rate Schedule (P3109)	A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.
5. Item Ledger Inquiry (P4111)	A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.
6. Line Schedule Review (P3152)	A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions

7. Schedule History Inquiry (P31226)

are associated with batch jobs or reports. To run a batch process, you must choose a version.

A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.

8. Work Order Completions (P31114)

A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.

9. Lot Master Revisions (P4108)

A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.

10. Hours and Quantities Update (R31422)

A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.

11. Name Search (P01012)

A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.

12. Test Results Revisions (P3711)

A user-defined set of specifications that control how applications and reports run. You use versions to group and save a set of user-defined processing option values and data selection and sequencing options. Interactive versions are associated with applications (usually as a menu selection). Batch versions are associated with batch jobs or reports. To run a batch process, you must choose a version.

Process

1. Enter a '1' to automatically process hours and quantities using the version for R31422. If left blank, R31422 should be submitted manually.

An option that specifies the type of processing for an event.

Setting Up Technical Information

This section provides an overview of technical information, and discusses how to:

- Run the Process Putaway Requests program.
- Run the Process Pick Requests program.
- Run the Process Replenishment Requests program.

Understanding Technical Information

The following information describes the function of the Location Selection Driver program (R46171), which exists in seven predefined versions in the Warehouse Management system:

- Process Putaway Requests
- Resuggest Putaway Requests
- Process Pick Requests
- Resuggest Pick Requests
- Process Replenishment Requests
- Resuggest Replenishment Requests
- Process Requests - Subsystem

When you are working with the Process Putaway Requests, Process Pick Requests, and Process Replenishment Requests versions of the Location Selection Driver program, you can run the Location Selection Audit report. Before you submit the appropriate version, the system displays processing options. The Audit tab contains a processing option that allows you to run the Location Selection Audit report, which contains information about the locations that the system suggests for putaway, pick, or replenishment.

Process Putaway Requests Program

You run the Location Selection Driver program (R46171) to process all movement requests at a particular status and create location suggestions. The same program processes putaway, picking, and replenishment requests. If you create your own version of the Location Selection Driver, you can define the type of request to process on Data Selection in the program's processing options.

Use the versions list to review the predefined versions of the Location Selection Driver program, such as Process Putaway Requests and Resuggest Putaway Requests.

When you run the Process Putaway Requests version, the program performs the following functions:

Function	Purpose
Locates outstanding putaway requests	The system searches for outstanding requests (requests for which you have not yet created suggestions) in the Warehouse Requests table (F4600). The system selects the requests that have a warehouse code of 1 (putaway). The Data Selection function of the program controls this process.

Function	Purpose
Creates error messages	The system creates an error message, which it displays during putaway confirmation, in the following instances: • The Audit Report (R46171) displays errors. • The putaway request's status is not 200 (Request Created) or 220 (Suggestion Created). • Putaway suggestions already exist, and you have not set the program's processing options to create alternate suggestions. • You tried to create alternate putaway suggestions after you confirmed the original suggestions. • The warehouse (branch/plant) is not a valid warehouse in the address book. • The system cannot convert the transaction's unit of measure into the item's primary unit of measure. • The item's primary branch/plant record does not exist. • The item's warehouse process groups and order group do not reference a valid putaway instruction table.
Chooses an instruction table	During process selection, the system selects a putaway instruction table for an item by comparing the item's warehouse process groups and order group to the groups specified in the process selection table. The system uses the following priorities: • Match all three warehouse process groups and the order group • Match all three warehouse process groups • Match the order group After the system locates the most accurate match, it uses the putaway instruction table that you specified for that combination of groups. The putaway instruction table must include a unit of measure that also exists in the item's unit of measure structure, or the system cannot create putaway suggestions.

Function	Purpose
Chooses location types	After the system selects a putaway instruction table, the method code attached to the table determines which location type the system suggests. You can set the method code to select: • Fixed locations • Random locations • Existing locations, which already contain the same item that you are moving • Empty locations If you specified a zone in the putaway instructions, the system searches for locations only within that putaway zone.
Chooses locations using location requirements	From the eligible locations, the system selects the locations that: • You can use for putaway • Have the same tax code as the item (optional) • Are not the location from which you are moving the item (usually the receiving dock)
Chooses locations using putaway instructions	The system ranks the remaining eligible locations according to the tiebreaker that you specified in the putaway instruction table. If you use the following criteria, the system selects the locations for which you: • Avoid exceeding the maximum putaway quantity for the location • Meet the minimum utilization percentage • Convert large units of measure into smaller units of measure, if necessary • Complete partial units of measure, such as half-filled pallets
Chooses locations using the item profile	If you use the following criteria, the system selects locations where the item's profile allows you to: • Mix different items in a location • Mix items with different dates or lot numbers in a location • Split an order line into more than one location suggestion • Move the items to a default location that you specify, if there is not enough space in the eligible locations

Function	Purpose
Chooses locations using the item unit of measure profile	If you use the following criteria, the system selects locations based on whether the item's unit of measure definition allows you to: • Convert large units of measure to smaller units of measure • Put the item in the location, according to the capacity method that you specified for the item You can use one of three capacity methods to decide if the item will fit: • Volume Method — Divide the usable cubic capacity of the locations by the dimensions of the item that you want to store in the location. The result must be less than or equal to 1. • Layering Method — Compare the item's dimensions to the location's usable dimensions. You must also have specified whether you allow the system to rotate the item and defined the stacking limit for the item unit of measure. • Quantity Method — Verify that the quantity of the item to store is equal to or less than the quantity that you defined for the location in Location Capacity Definition (P46024).
Chooses locations using the location profile	If you use the following criteria, the system selects locations based on whether the location profile detail allows you to: • Use the location for putaway • Include the location in the putaway zone, if you specified one in the movement instructions • Use the location for staging (unlimited capacity) • Mix different containers in the location • Mix items with different dates or lot numbers in the location • Store the item without exceeding the location's maximum number of items • Store the item based on the item's tax code • Store the item based on whether you allow the item's container to exist in the location • Store the item if it exceeds the location's minimum putaway percentage • Use the location's putaway sequence number as a tiebreaker to rank locations that are otherwise equally suitable • Use the location's proximity (latitude, longitude, and height) to the receiving location as a tiebreaker to rank locations that are otherwise equally suitable

Process Pick Requests Program

You run the Location Selection Driver program (R46171) to process all movement requests at a particular status and create location suggestions. The same program processes putaway, picking, and replenishment requests. If you create your own version of the Location Selection Driver, you can define the type of request to process on Data Selection in the program's processing options.

Use the versions list to review the predefined versions of the Location Selection Driver program, such as Process Pick Requests and Resuggest Pick Requests.

When you run the Process Pick Requests version, the program performs the following functions:

Function	Purpose
Locates outstanding pick requests	The system searches for outstanding requests (requests for which you have not yet created suggestions) in the Warehouse Requests table. The system selects the requests that have a warehouse code of 2 (picking). The Data Selection function of the program controls this process.
Creates error messages	The system creates an error message, which it displays during pick confirmation, in the following instances: • Errors also on (R46171) Audit Report • The pick request's status is not 200 (Request Created) or 220 (Suggestion Created). • Pick suggestions already exist, and you have not set the program's processing options to create alternate suggestions. • You tried to create alternate pick suggestions after you confirmed the original suggestions. • The warehouse (branch/plant) is not a valid warehouse in the branch/plant constants. • The system cannot convert the transaction's unit of measure into the item's primary unit of measure. • The item's primary branch/plant record does not exist. • The item's warehouse process groups and order group do not reference a valid picking instruction table.

Function	Purpose
Chooses an instruction table	During process selection, the system selects a picking instruction table for an item by comparing the item's warehouse process groups and order group to the groups specified in the process selection table. The system uses the following priorities: • Match all three warehouse process groups and the order group • Match all three warehouse process groups • Match the order group After the system locates the most accurate match, it uses the picking instruction table that you specified for that combination of groups. The picking instruction table must include a unit of measure that also exists in the item's unit of measure structure, or the system cannot create picking suggestions.
Chooses location types	After the system selects a picking instruction table, the method code attached to the table determines which location type that the system suggests: • Fixed locations • Random locations If you specified a zone in the picking instructions, the system searches for locations only within that pick zone.
Chooses locations using location requirements	From the remaining eligible locations, the system selects the locations that: • You can use for picking • Are not the location to which you are moving the item (usually the shipping dock)

Function	Purpose
Chooses locations using pick instructions	The system ranks the eligible locations according to the tiebreaker that you specified in the picking instruction table. If you use the following criteria, the system selects the locations for which you can: • Meet or exceed the minimum pick percentage for the location • Avoid exceeding the maximum pick quantity for the location • Combine smaller units of measure into larger units of measure, if necessary rollup. • Require automatic replenishment after you deplete the items in the location (for fixed picking locations only) • Use the First In First Out (FIFO) picking method based on the commitment method you specify on Branch/Plant Constants You can set the picking method to: • Avoid using FIFO. Instead, rank locations according to the tiebreaker. • Rank locations from the lowest lot number to the highest lot number. • Rank locations from the earliest expiration date to the latest expiration date for the date that you stored the item. • Rank locations from the oldest date to the newest date that you received the item.

Function	Purpose
Chooses locations using the location profile	If you use the following criteria, the system selects locations based on whether the location profile detail allows you to: • Use the location for picking • Include the location in the pick zone, if you specified one in the movement instructions • Use the location's picking sequence number as a tiebreaker to rank locations that are otherwise equally suitable • Use the location's proximity (latitude, longitude, and height) to the shipping location as a tiebreaker to rank locations that are otherwise equally suitable
Picks from locations according to item availability	From the eligible locations, the system picks items according to the following priority: • Pick from locations with available quantity, ignoring inbound quantities (incoming purchase orders) • Pick from locations using any available inbound quantities • Pick from locations that you replenished as a result of automatic replenishment The system displays an error message if it cannot satisfy the pick request using available, incoming, or replenished quantities. If the customer does not allow the partial shipment of an order, the system automatically deletes any pick suggestions for the order, and you do not fill the order.

Process Replenishment Requests Program

You run the Location Selection Driver program (R46171) to process all movement requests at a particular status and create location suggestions. The same program processes putaway, picking, and replenishment requests. If you create your own version of the Location Selection Driver, you can define the type of request to process on Data Selection in the program's processing options.

Use the versions list to review the predefined versions of the Location Selection Driver program, such as Replenishment Requests and Resuggest Replenishment Requests.

When you run the Process Replenishment Requests version, the program performs the following functions:

Function	Purpose
Locates outstanding replenishment requests	The system searches for outstanding requests (requests for which you have not yet created suggestions) in the Warehouse Requests table. The system selects the requests that have a warehouse code of 3 (replenishment). The Data Selection function of the program controls this process.

Function	Purpose
Creates error messages	The system creates an error message, which it displays during replenishment confirmation, in the following instances: • Audit Report (R46171) • The replenishment request's status is not 200 (Request Created) or 220 (Suggestion Created). • Replenishment suggestions already exist, and you did not delete the existing suggestions to create alternate suggestions. • You tried to create alternate replenishment suggestions after you confirmed the original suggestions. • The warehouse (branch/plant) is not a valid warehouse in the branch/plant constants. • The system cannot convert the transaction's unit of measure into the item's primary unit of measure. • The item's primary branch/plant record does not exist. • The item's warehouse process groups and order group do not reference a valid replenishment instruction table.
Chooses an instruction table	During process selection, the system selects a replenishment instruction table for an item by comparing the item's warehouse process groups and order group to the groups specified in the process selection table. The system uses the following priorities: • Match all three warehouse process groups and the order group • Match all three warehouse process groups • Match the order group After the system locates the most accurate match, it uses the replenishment instruction table that you specified for that combination of groups. The replenishment instruction table must include a unit of measure that also exists in the item's unit of measure structure, or the system cannot create replenishment suggestions.
Chooses location types	After the system selects a replenishment instruction table, the method code attached to the table determines which location type the system suggests. You can set the method code to select: • Fixed locations • Random locations

Function	Purpose
Chooses locations using location requirements	From the eligible locations, the system selects the locations that: • You can use for replenishment • Are not the location to which you are moving the item (usually a pick location)
Chooses locations using replenishment instructions	The system ranks the remaining eligible locations according to the tiebreaker that you specified in the replenishment instruction table. If you use the following criteria, the system selects the locations for which you can: • Meet the minimum utilization percentage • Avoid exceeding the maximum replenishment quantity • Combine smaller units of measure into larger units of measure, if necessary • Use the First In First Out (FIFO) picking method based on the commitment method that you specify on Branch/Plant Constants You can set the picking method to: • Avoid using FIFO. Instead, rank locations according to the tiebreaker. • Rank locations from the lowest lot number to the highest lot number. • Rank locations from the earliest expiration date to the latest expiration date for the date when you stored the item. • Rank locations from the oldest date to the most recent date when you received the item.

Function	Purpose
Chooses locations using the location profile	If you use the following criteria, the system selects locations based on whether the location profile detail allows you to: • Use the location for replenishment • Include the location in the replenishment zone, if you specified one in the replenishment instructions • Use the location's replenishment sequence number as a tiebreaker to rank locations that are otherwise equally suitable • Use the location's proximity (latitude, longitude, and height) to the To location as a tiebreaker to rank locations that are otherwise equally suitable
Replenishes from locations according to item availability	From the eligible locations, you replenish items according to the following priority: • Replenish from locations with available quantity, ignoring inbound quantities (incoming purchase orders) • Replenish from locations with inbound quantities

Request and Suggestion Statuses

The system uses status codes to track movement requests and suggestions. The following status codes are hard coded in a user defined codes table (46/PS):

Request Statuses

- 200 Request Created
- 220 Request Suggested
- 250 Request in Confirmation
- 291 Request Canceled
- 299 Request Closed

Suggestion Statuses

- 300 Location Suggested
- 320 Suggestion Assigned to Tasks
- 340 Suggestion Printed
- 391 Suggestion Canceled
- 399 Suggestion Confirmed

Putaway Reservation Statuses

The system uses status codes to track putaway reservations. The following status codes are hard coded in a user defined codes table (46/PS):

- 100 Reserved
- 191 Reservation Canceled

- 199 Reservation Closed

Running the Process Putaway Requests Program

To run the Process Putaway Requests program, select Inbound Warehousing Operations (G4611), Process Putaway Requests.

Running the Process Pick Requests Program

To run the Process Pick Requests program, select Outbound Warehousing Operations (G4612), Process Pick Requests.

Running the Process Replenishment Requests Program

To run the Process Replenishment Requests program, select Replenishment Operations (G4613), Process Replenishment Requests.

Glossary of PeopleSoft Terms

activity	A scheduling entity in PeopleSoft EnterpriseOne Form Design Aid that represents a designated amount of time on a calendar.
activity rule	The criteria by which an object progresses from one given point to the next in a flow.
add mode	A condition of a form that enables users to input data.
Advanced Planning Agent (APAg)	A PeopleSoft EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of relational databases, flat file format, and other data or message encoding, such as XML.
application server	A server in a local area network that contains applications shared by network clients.
as if processing	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
alternate currency	A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction. In PeopleSoft EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.
as of processing	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various PeopleSoft EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
back-to-back process	A process in PeopleSoft EnterpriseOne Workflow Management that contains the same keys that are used in another process.
batch processing	A process of transferring records from a third-party system to PeopleSoft EnterpriseOne. In PeopleSoft EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than EnterpriseOne to PeopleSoft EnterpriseOne Accounts Receivable and PeopleSoft EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to PeopleSoft EnterpriseOne.
batch server	A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.
batch-of-one immediate	A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect and store-and-forward.
business function	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through

	event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	See named event rule (NER).
business view	A means for selecting specific columns from one or more PeopleSoft EnterpriseOne tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
central objects merge	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
central server	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical PeopleSoft EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.
charts	Tables of information in PeopleSoft EnterpriseOne that appear on forms in the software.
connector	Component-based interoperability model that enables third-party applications and PeopleSoft EnterpriseOne to share logic and data. The PeopleSoft EnterpriseOne connector architecture includes Java and COM connectors.
contra/clearing account	A general ledger account in PeopleSoft EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in PeopleSoft EnterpriseOne General Accounting.
Control Table Workbench	An application that, during the installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
cost assignment	The process in PeopleSoft EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
cost component	In PeopleSoft EnterpriseOne Manufacturing Management, an element of an item's cost (for example, material, labor, or overhead).
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
database server	A server in a local area network that maintains a database and performs searches for client computers.
Data Source Workbench	An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System-release number data source. It also updates the Data Source Plan detail record to reflect completion.

date pattern	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail information	Information that relates to individual lines in PeopleSoft EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate and store-and-forward.
Do Not Translate (DNT)	A type of data source that must exist on the iSeries because of BLOB restrictions.
dual pricing	The process of providing prices for goods and services in two currencies.
edit code	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
edit mode	A condition of a form that enables users to change data.
edit rule	A method used for formatting and validating user entries against a predefined rule or set of rules.
Electronic Data Interchange (EDI)	An interoperability model that enables paperless computer-to-computer exchange of business transactions between PeopleSoft EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
Employee Work Center	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.
enterprise server	A server that contains the database and the logic for PeopleSoft EnterpriseOne or PeopleSoft World.
EnterpriseOne object	A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.
EnterpriseOne process	A software process that enables PeopleSoft EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. PeopleSoft EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
Environment Workbench	An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System-release number data source. It also updates the Environment Plan detail record to reflect completion.
escalation monitor	A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

event rule	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a <i>business unit</i> .
fast path	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
file server	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network user request files and make changes to these files.
final mode	The report processing mode of a processing mode of a program that updates or creates data records.
FTP server	A server that responds to requests for files via file transfer protocol.
header information	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
interface table	See Z tables.
integration server	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
integrity test	A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interoperability model	A method for third-party systems to connect to or access PeopleSoft EnterpriseOne.
in-your-face-error	In PeopleSoft EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
IServer service	Developed by PeopleSoft, this internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.
jargon	An alternative data dictionary item description that PeopleSoft EnterpriseOne or People World displays based on the product code of the current object.
Java application server	A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that enables heterogeneous servers to access each other's data.
JDEBASE Database Middleware	A PeopleSoft proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
JDECallObject	An API used by business functions to invoke other business functions.
jde.ini	A PeopleSoft file (or member for iSeries) that provides the runtime settings required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running PeopleSoft EnterpriseOne. This includes workstations and servers.
JDEIPC	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log	The main diagnostic log file of PeopleSoft EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of PeopleSoft EnterpriseOne.
JDENET	PeopleSoft proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all PeopleSoft EnterpriseOne supported platforms.
Location Workbench	An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source.
logic server	A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when PeopleSoft EnterpriseOne and World software runs.
MailMerge Workbench	An application that merges Microsoft Word 6.0 (or higher) word-processing documents with PeopleSoft EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.
master business function (MBF)	An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.
master table	See published table.
matching document	A document associated with an original document to complete or change a transaction. For example, in PeopleSoft EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.
media storage object	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
message center	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user.
messaging adapter	An interoperability model that enables third-party systems to connect to PeopleSoft EnterpriseOne to exchange information through the use of messaging queues.
messaging server	A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.
named event rule (NER)	Encapsulated, reusable business logic created using event rules, rather than C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.
<i>nota fiscal</i>	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
<i>nota fiscal factura</i>	In Brazil, a <i>nota fiscal</i> with invoice information. See also <i>nota fiscal</i> .

Object Configuration Manager (OCM)	In PeopleSoft EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.
Object Librarian	A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of PeopleSoft EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.
Object Librarian merge	A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.
Open Data Access (ODA)	An interoperability model that enables you to use SQL statements to extract PeopleSoft EnterpriseOne data for summarization and report generation.
Output Stream Access (OSA)	An interoperability model that enables you to set up an interface for PeopleSoft EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.
package	EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snap shot of the central objects on the deployment server.
package build	A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in PeopleSoft EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build. Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”
package location	The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.
Package Workbench	An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the System-release number data source. It also updates the Package Plan detail record to reflect completion.
PeopleSoft Database	See JDEBASE Database Middleware.
planning family	A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.
preference profile	The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.
print server	The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.
pristine environment	A PeopleSoft EnterpriseOne environment used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option	A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.
production environment	A PeopleSoft EnterpriseOne environment in which users operate EnterpriseOne software.
production-grade file server	A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.
program temporary fix (PTF)	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or disks.
project	In PeopleSoft EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.
promotion path	The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path): 11>21>26>28>38>01 In this path, 11 equals new project pending review, 21 equals programming, 26 equals QA test/review, 28 equals QA test/review complete, 38 equals in production, 01 equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.
proxy server	A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.
published table	Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the PeopleSoft methods for replicating data to individual workstations. Such machines are set up as pull subscribers using PeopleSoft EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.
QBE	An abbreviation for query by example. In PeopleSoft EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.
real-time event	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other PeopleSoft systems that have requested notification when certain transactions occur.
refresh	A function used to modify PeopleSoft EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.
replication server	A server that is responsible for replicating central objects to client machines.
quote order	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In PeopleSoft EnterpriseOne Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
selection	Found on PeopleSoft menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
Server Workbench	An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the System-release number data source. It also updates the Server Plan detail record to reflect completion.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a PeopleSoft EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
supplemental data	Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs. For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across PeopleSoft EnterpriseOne systems.
table access management (TAM)	The PeopleSoft EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
Table Conversion Workbench	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table conversion	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table event rules	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although PeopleSoft EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
terminal server	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing	The task of entering, reviewing and approving, and posting batches of transactions in PeopleSoft EnterpriseOne.
three-way voucher match	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.
transaction processing (TP) monitor	A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.
transaction set	An electronic business transaction (electronic data interchange standard document) made up of segments.
trigger	One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.
triggering event	A specific workflow event that requires special action or has defined consequences or resulting actions.
two-way voucher match	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
User Overrides merge	Adds new user override records into a customer's user override table.
variance	In Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment. In EnterpriseOne Project Costing and EnterpriseOne Manufacturing Management, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.
Version List merge	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.
visual assist	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
vocabulary override	An alternate description for a data dictionary item that appears on a specific PeopleSoft EnterpriseOne or World form or report.
wchar_t	An internal type of a wide character. It is used for writing portable programs for international markets.
web application server	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
web server	A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.
Windows terminal server	A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

work day calendar	In EnterpriseOne Manufacturing Management, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.
workflow	The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.
workgroup server	A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.
XAPI events	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and then calls third-party software, end users, and other PeopleSoft systems that have requested notification when the specified transactions occur to return a response.
XML CallObject	An interoperability capability that enables you to call business functions.
XML Dispatch	An interoperability capability that provides a single point of entry for all XML documents coming into PeopleSoft EnterpriseOne for responses.
XML List	An interoperability capability that enables you to request and receive PeopleSoft EnterpriseOne database information in chunks.
XML Service	An interoperability capability that enables you to request events from one PeopleSoft EnterpriseOne system and receive a response from another PeopleSoft EnterpriseOne system.
XML Transaction	An interoperability capability that enables you to use a predefined transaction type to send information to or request information from PeopleSoft EnterpriseOne. XML transaction uses interface table functionality.
XML Transaction Service (XTS)	Transforms an XML document that is not in the PeopleSoft EnterpriseOne format into an XML document that can be processed by PeopleSoft EnterpriseOne. XTS then transforms the response back to the request originator XML format.
Z event	A service that uses interface table functionality to capture PeopleSoft EnterpriseOne transactions and provide notification to third-party software, end users, and other PeopleSoft systems that have requested to be notified when certain transactions occur.
Z table	A working table where non-PeopleSoft EnterpriseOne information can be stored and then processed into PeopleSoft EnterpriseOne. Interface tables also can be used to retrieve PeopleSoft EnterpriseOne data. Interface tables are also known as interface tables.
Z transaction	Third-party data that is properly formatted in interface tables for updating to the PeopleSoft EnterpriseOne database.

Index

A

- additional documentation xvi
- Advanced topics and inquiries 269
- Allowed containers
 - setting up 62
- Allowed Containers by Location (P46026) 62
- application fundamentals xv
- Assigning characteristic groups to locations 39
- Assigning tax codes 271, 274
- Attributes
 - location 20

B

- Balance
 - comparing item balance 277, 280
- Batch Confirmations (R4617) 188, 227, 233, 259, 261
- Batch Picking Requests (R46150) 195, 223
- Batch Putaway Reservations (R461301) 177
- Batch Putaway Reservations report 177
- Branch/Plant Constants (P41001) 23
- Breakdown percentages 147
- Build Location Detail Information (R46820) 277, 281
- Bulk pick requests
 - creating 195, 223
- Bulk pick suggestions
 - confirming 233

C

- Calculating Round to Standard Pack 86
- Calculating volume and weight 270
- Canceling pick requests 195
- Canceling putaway requests 169
- Canceling putaway reservations 175
- Canceling replenishment requests 250, 252
- Canceling replenishment suggestions 258
- Capacity
 - defining for locations 33
- Capacity methods 21

- layering 20
- quantity 21
- volume checking 20
- carton
 - container 8
- Carton charges 77
- Carton creation status 71
- Carton detail 74
- Carton Recommendation Rules (P46013) 70
- Carton recommendations 71
- Carton Recommendations (R46151) 77
- Carton Reorganization (P4620) 67, 76, 231, 234
- Cartons
 - calculating round to standard pack 74
 - Carton Recommendations (R46151) 77
 - container bill of materials 65
 - creating carton detail 74
 - examples of carton charges 79
 - expendable containers 77
 - partial cartons and pallets 73
 - reorganizing 76
 - setting up fill percentages for items 70
 - setting up location
 - recommendations 69
 - setting up recommendation methods for items 69
 - structure and hierarchy 73
- Changing existing putaway reservations 177
- Characteristics
 - location 29
 - random movement rules 37
- Classification codes
 - item dimension groups 42
 - warehouse process groups 42
- comments, submitting xx
- common elements xx
- Comparing inventory and warehouse item balance 277, 280
- Completions Workbench
 - processing options 295
- Configuration Management

- integration with Warehouse Management 6
- Confirmation
 - pick suggestions 226
 - putaway suggestions 187
 - replenishment suggestions 258
 - setting up two-phase confirmation 271
- Confirming bulk pick suggestions 233
- Confirming pick suggestions 226
- Confirming pick suggestions by batch 227, 233
- Confirming pick suggestions interactively 233
- Confirming putaway suggestions 187
- Confirming putaway suggestions by batch 188
- Confirming putaway suggestions interactively 188
- Confirming replenishment suggestions 258
- Confirming shipment 231, 234
- Confirming shipments
 - additional non-inventory line items 236
 - Shipment Confirmation form 235
- contact information xx
- Container and Carton Codes (P46091) 58, 67, 76
- Container bill of materials 65
- Containers
 - defining storage containers 58
 - setting up allowed containers 62
- Create Bulk Pick Requests (R46200) 195, 223
- Creating a manufacturing parts list
 - batch method 283, 284
 - interactive method 283, 284
- Creating alternate pick suggestions 225, 233
- Creating alternate putaway reservations 177
- Creating alternate putaway suggestions 180, 181
- Creating alternate replenishment suggestions 256, 260
- Creating bulk pick requests 195, 223
- Creating location detail information 277, 281
- Creating move slips and tags 184, 186, 230, 234, 258, 261
- Creating parts lists 283, 284
- Creating pick requests by batch 195, 223
- Creating pick requests interactively 196
- Creating pick requests through manufacturing systems 282
- Creating pick suggestions by batch 224, 233
- Creating pick suggestions interactively 225, 233
- Creating putaway requests 153
- Creating putaway requests through manufacturing systems 284
- Creating putaway reservations 176
- Creating putaway reservations by batch 177
- Creating putaway reservations for all order lines 176
- Creating putaway reservations interactively 175
- Creating putaway suggestions 179
- Creating putaway suggestions by batch 180, 181
- Creating putaway suggestions interactively 180, 181
- Creating replenishment requests
 - automatically 251, 253
- Creating replenishment requests by batch 250, 253
- Creating replenishment requests interactively 252
- Creating replenishment suggestions by batch 256, 259, 260, 261
- Creating replenishment suggestions interactively 256, 259, 261
- Creating task and trip assignment and move documents 183
- Creating tasks and trips 230, 234, 257, 261
- Creating the summary document 230, 234, 257, 261
- Creating the warehouse 23
- Cross docking
 - defining movement instructions for picking 147
 - definition 154
- Cross Docking
 - workbench 155, 168
- cross-references xix
- Customer Connection website xvi
- Customer Service Inquiry 194

D

- Defining detailed replenishment information 262, 266
- Defining ineligible items for picking 283, 285
- Defining item classification codes 49
- Defining item units of measure 51
- Defining location capacity 33
- Defining location characteristics 29
- Defining location characteristics by location or group 39
- Defining location dimensions 27
- Defining location profile information 29
- Defining maximum quantity by zone 272
- Defining movement instructions 145
 - common criteria 149
 - specific criteria 147, 150
- Defining Process Selection 141
- Defining process selection rules 141
- Defining replenishment groups 262, 265
- Defining shipping cartons 67
- Defining storage containers 58
- Defining the level of detail for locations 26
- Defining unit of measure structures 44
- Defining warehouse specifications 24
- Defining zones 26
- Detail information
 - processing options 196
- Dialog boxes 5
- Dimension and weight calculations 270
- Dimensions
 - defining for locations 27
 - gross cubic dimensions 19
 - item dimension groups 42, 276, 280
 - usable cubic dimensions 19
- Displays 5
- documentation
 - printed xvi
 - related xvi
 - updates xvi
- Documents
 - move 183

E

- Electronic data interchange (EDI)
 - transactions 8
- Entering locations
 - defining zones 26

- interactive method 26

- Entering locations interactively 26

- Entering transfer orders 216

- Expendable containers 77
 - examples of carton charges 79

F

- Files 5

- Fill percentages
 - setting up cartons 70

- First In First Out

- picking 8

- Fixed and random locations 16

- Fixed Location Replenishment (R461601) 250, 253

- Fixed locations

- setting up 34

- setting up for picking 36

- setting up for putaway 35

- Fixed Locations (P46012) 35, 36

- Fixed Putaway, Picking, or Replenishment Requirements (P46822) 37, 40

- Fixed Replenishment Zones (P46051) 36

- Fixed zones

- setting up 34

- setting up for replenishment 36

- Foreign imports and exports 271, 274

- Forms

- Additional Selection Criteria 154

- Additional System Information 285

- Allowed Containers by Location - Revisions 62

- Branch Location Definition 24

- Bulk Pick Detail 233

- Change Existing Putaway

- Reservations 178

- Change/Split Suggestion 187

- Confirm Putaway Suggestions 188, 196

- Container and Carton Codes

- Revisions 58

- Create Putaway Requests 157

- Create Putaway Reservations 176

- Create Putaway Suggestions 181

- Define Movement Instructions 148

- Enter Location Information 26

- Enter Location Profile Information 29

- Fixed Location Revisions 35, 36

- Fixed Replenishment Zone Revisions 36

- Item Branch Class Codes 49
- Item Profile Revisions 49
- Item Unit of Measure Conversions 44
- Item/Carton Recommendation Rules
 - Revisions 71, 85
- Locate Existing Putaway Requests 170
- Location Capacity Revisions 33
- Manage License Plate Information 121
- Online Putaway Reservations
 - Detail 175, 176
- Order Group Revisions 54
- Override Shipping Location 234
- Process RFID Information 133
- Putaway Requests Inquiry 180
- Random Requirements Revisions 40
- Replenishment Information by Random
 - Rules 266
- Replenishment Requests Inquiry 255
- Requests Inquiry 169, 250
- Select Picking Locations 225
- Select Putaway Locations 180
- Select User Defined Code 53
- Set Up Advanced Features 273
- Set Up Carton Fill Percentages for
 - Items 71
- Set Up Carton Recommendation Methods
 - for Items 70
- Set Up Container Bill of Materials 66
- Set Up Fixed Locations and Zones 35
- Set Up Inclusion Rules 53
- Set Up Item Warehouse Information 44
- Set Up Locations 21
- Set Up Locations for Carton
 - Recommendations 69
- Set Up Manufacturing Information 284
- Set Up Order Groups 54
- Set Up Random Requirements 39
- Set Up Shipping Cartons 68
- Set Up Storage Containers 58
- Set Up UCC 128 Processing 101
- Set Up Unit of Measure Groups 55
- Shipment Confirmation 235
- Speed Group Maintenance 280
- Unit of Measure Group Revisions 55
- Update Groups 280
- Use Advanced Features 279
- Use Standard Pack Carton
 - Recommendations 81
- Weights and Measures 42
- Work with Label Information 108, 113

- Work With Location Details 281
- Work with Pick Suggestions 232
- Work with Replenishment
 - Requests 252
- Work with Replenishment
 - Suggestions 260
- Work with Replenishment to Random
 - Locations 265
- Freeze rules
 - setting up 271, 275

G

- Gross cubic dimensions 19
- Groups
 - setting up unit of measure groups 55

H

- Header information
 - processing options 196
- Hierarchical configurations
 - setup 98

I

- Identifying ineligible items 283, 285
- Inbound Label Processing 106
- Inbound shipment reconciliation 106
- Inclusion rules
 - setting up 53
- Ineligible items
 - defining ineligible items for
 - picking 283, 285
- Inquiries
 - Customer Service Inquiry 194
 - Location Detail inquiry 278, 281
 - Location Utilization inquiry 278, 281
- Integration
 - system integration 5
- Interoperability 8
- Inventory Management
 - integration with Warehouse
 - Management 6
- Item balance 277, 280
- Item Branch (P41026) 49
- Item branch records
 - comparing with location detail
 - records 277, 280
- Item classification codes 17
- Item dimension groups 276, 280
- Item information

- UCC 128 processing 99
- Item Master
 - processing options 45
- Item Master (P4101) 44, 285
- Item Profile Revisions (P46010) 49
- Item standard pack \i 62
- Item Standard Packs (P460131) \i 62
- Item Unit of Measure Definition (P46011) 43
- Item warehouse information
 - setting up 41
- Items
 - comparing balances 277, 280
 - defining capacity 43
 - defining classification codes 49
 - defining unit of measure structures 42, 44
 - defining units of measure 51
 - dimension groups 42
 - identifying ineligible items for picking 283, 285
 - reorganizing 76
 - setting up carton fill percentages 70
 - setting up carton recommendation methods 69
 - setting up profiles 49

L

- Labels
 - inbound label processing 106
 - label processing 103
 - outbound label processing 105
 - preferences 105
 - serial numbers 105
- Layering 20, 21
- Level of detail
 - defining 26
- License plate tracking 272, 275
- Line default information
 - shipment confirmation 235
- Locating existing pick requests 195, 223
- Locating existing putaway requests 169
- Locating existing replenishment requests 251, 255
- Location Capacity Definition (P46024) 33
- Location Characteristics (P46021) 29, 39
- Location Detail inquiry 278, 281
- Location Detail Maintenance (P4602) 277, 280

- Location detail records
 - comparing with item branch records 277, 280
- Location Dimensions (P46022) 27
- Location Master (P4100) 26
- Location Profile (P46020) 29
- Location profile information
 - defining 29
- Location Selection Driver (R46171) 180, 181, 224, 233, 251, 253, 298
- Location Selection Driver (R46171) 180, 181
- Location Utilization (P46220) 278, 281
- Location Utilization inquiry 278, 281
- Locations
 - attributes 21
 - creating location detail information from existing inventory data 277, 281
 - defining capacity 33
 - defining characteristics 29
 - defining dimensions 27
 - defining level of detail 26
 - defining zones 26
 - entering interactively 26
 - fixed locations 34
 - foreign 271, 274
 - managing detail information 277, 280
 - overriding shipping locations 227, 234
 - random locations 36
 - replenishment zones 34
 - See Also* setting up
 - setting up carton recommendation 69
 - setting up locations 18
 - staging locations 271
 - to and from locations 271

M

- Managing location detail
 - information 277, 280
- Manual Replenishments (P46100) 252
- Manual wave planning
 - picking 225
 - putaway 180
 - replenishment 256
- Manufacturing systems
 - creating pick requests 282
 - creating putaway requests 284
- Manufacturing Work Order Processing (P48013) 283, 284
- Maximum quantity by zone

- defining 272
- Memo lots 146
- Minimum utilization percentage 147
- MMA Partners xvi
- Move documents 183
- Move tags 184, 186, 230, 234, 258, 261
- Movement confirmation
 - two-phase 271
- Movement instructions
 - defining 40, 145, 146, 147
 - See Also* common criteria ; items with serial numbers; random rules; specific criteria
- Movement programs
 - Process Pick Requests 302, 309
 - Process Putaway Requests 298, 309
 - Process Replenishment Requests 305, 309
- Movement rules 5

N

- notes xix

O

- Order entry
 - processing options 196
- Order groups 54
 - setting up 54
- Order Groups (P46092) 54
- Order Processing (R31410) 284
- Outbound and Label Processing 105
- Overrides
 - pick suggestions 234
 - putaway suggestions 188
 - replenishment suggestions 261
 - shipping location 227, 234
 - unit of measure structure 153
 - warehouse 154
- Overriding pick suggestions 234
- Overriding putaway suggestions 188
- Overriding replenishment suggestions 261
- Overriding shipping locations 227, 234
- Overview of locations 14

P

- Pallet Standard Packs (P460132) 64
- Pallets 73
- Partial Cartons and Pallets 73

- Parts list
 - creating 283, 284
 - See Also* batch method; interactive method
- PeopleBooks
 - ordering xvi
- PeopleCode, typographical conventions xviii
- PeopleSoft application fundamentals xv
- Phases 43
- Pick requests 5
- Pick, pack, and ship 76
- Picking
 - definition 193
 - fixed locations 36
 - See Also* setting up
 - identifying ineligible items 283, 285
 - phases 43
 - requests 194, 195, 223, 278, 282
 - See Also* bulk; canceling; locating ; purging; serial numbers
 - rollup 272, 275
 - See Also* setting up
 - setting up freeze rules 271, 275
 - suggestions 224, 225, 226, 231, 233, 278, 282
 - See Also* canceling; confirming; creating; purging
- Planned Cross Docking Workbench (P4614) 155, 168
- PO Receipts
 - processing options 158
- PO Receipts (P4312) 153
- Preferences
 - described 215
- Preferences for label processing 105
- prerequisites xv
- Primary unit of measure 42
- printed documentation xvi
- Process groups
 - warehouse 276
- Process mode
 - setting 146
- Process Pick Requests (P46171) 302, 309
- Process Putaway Requests (P46171) 298, 309
- Process Replenishment Requests (P46171) 305, 309
- Process selection
 - defining 141

- Process selection rules
 - defining 141
- Processing options
 - Completions Workbench 295
 - Item Master 45
 - PO Receipts 158
 - Replenishment by Random Rules 266
 - Replenishment Groups 266
 - Sales Order Entry 196
 - Super Backflush 292
 - Work Order Completions 285
- Procurement
 - integration with Warehouse Management 6
- Profiles
 - defining for locations 29
 - types 8
- Programs and IDs 5
 - P34004 (Supply/Demand Inclusion Rules) 53
 - P4100 (Location Master) 26
 - P41001 (Branch/Plant Constants) 23, 24
 - P4101 (Item Master) 44, 285
 - P41020 (item master maintenance - UCC 128) 103
 - P41026 (Item Branch) 49
 - P4205 (shipment confirmation) 235
 - P4205 (Shipment Confirmation) 231, 234
 - P4210 (Sales Order Entry) 196
 - P4312 (PO Receipts) 153
 - P4600 (Replenishment Requests) 251, 255
 - P4600 (Request Inquiry) 169, 180, 195, 223, 225, 233, 256
 - P46010 (Item Profile Revisions) 49
 - P46011 (Item Unit of Measure Definition) 51, 69
 - P46012 (Fixed Locations) 35, 36
 - P46013 (Carton Recommendation Rules) 70
 - P46014 (Replenishment Groups) 262, 265
 - P46015 (Replenishment Information by Random Rules) 263, 266
 - P4602 (Location Detail Maintenance) 277, 280
 - P46020 (Location Profile) 29
 - P46021 (Location Characteristics) 29, 39
 - P46022 (Location Dimensions) 27
 - P46024 (Location Capacity Definition) 33
 - P46026 (Allowed Containers by Location) 62
 - P46051 (Fixed Replenishment Zones) 36
 - P46091 (Container and Carton Codes) 58, 67
 - P46092 (Order Groups) 54
 - P46093 (Putaway/Picking /Replenishment Selection) 141
 - P46095 (Putaway/Picking /Replenishment Instructions) 145
 - P46096 (Unit of Measure Groups) 55
 - P46100 (Manual Replenishments) 252
 - P46130 (Putaway Reservations) 175, 176
 - P4614 (Planned Cross Docking Workbench) 155, 168
 - P4617 (Warehouse Movement Confirmations) 187, 226, 258
 - P46171 (Process Pick Requests) 302, 309
 - P46171 (Process Putaway Requests) 298, 309
 - P46171 (Process Replenishment Requests) 305, 309
 - P4620 (Carton Reorganization) 67, 76, 231, 234
 - P46220 (Location Utilization) 278, 281
 - P46822 (Fixed Putaway, Picking, or Replenishment Requirements) 40
 - P47HL (hierarchical configuration definition) 101
 - P48013 (Manufacturing Work Order Processing) 283, 284
 - R31410 (Order Processing) 284
 - R4600P (WMS Purge Movement Information) 278, 282
 - R461301 (Batch Putaway Reservations) 177
 - R46150 (Batch Picking Requests) 195, 223
 - R461601 (Fixed Location Replenishment) 250, 253
 - R461602 (Replenishment to Random Locations) 263, 267

R4617 (Batch Confirmations) 188,
 227, 233, 259, 261
 R46171 (Location Selection
 Driver) 180, 181, 224, 225,
 233, 251, 253, 256, 261, 298
 R46200 (Create Bulk Pick
 Requests) 195, 223
 R46471 (Task and Trip Creation) 230
 R46471 (Task and Trip Creation)" 234,
 257, 261
 R46820 (Build Location Detail
 Information) 277, 281
 R46990 (Warehouse Location
 Integrity) 277, 280
 R46995 (Repost Open
 Suggestions) 277, 280
 Purging closed requests, suggestions, tasks,
 and reservations 278, 282
 Putaway
 cross docking 154
 fixed locations 35
 See Also setting up
 freeze rules 271, 275
 maximum quantity by zone 272
 See Also setting up
 phases 43
 repack 272, 276
 See Also setting up
 requests 153, 154, 169, 278, 282, 284
 See Also canceling; creating; locating;
 purging; serial numbers
 reservations 175, 176, 177, 278, 282
 See Also canceling; changing; creating;
 purging
 suggestions 179, 180, 181, 188, 278,
 282
 See Also confirming; creating; creating
 ; purging
 Putaway requests 5
 Putaway Reservations (P46130) 175, 176
 Putaway/Picking/Replenishment
 Instructions (P46095) 145
 Putaway/Picking/Replenishment Selection
 (P46093) 141

Q

Quantity checking
 capacity checking method 21

R

R46151 Carton Recommendations 77
 Random requirements
 setting up 36
 Random rules
 setting up 40
 Receipt routing
 putaway requests 154
 Reconciling Inbound Shipment Information
 111
 related documentation xvi
 Reorganizing cartons and items in a
 shipment 76
 Repack
 setting up 272, 276
 Replenishment
 definition 249
 phases 43
 requests 250, 251, 252, 253, 255, 278,
 282
 See Also canceling; creating; locating;
 purging
 setting up fixed zones 36
 suggestions 256, 258, 259, 260, 261,
 278, 282
 See Also canceling; confirming;
 creating; purging
 Replenishment by Random Rules
 processing options 266
 Replenishment Groups (P46014) 262,
 265
 Replenishment Information by Random
 Rules (P46015) 263, 266
 Replenishment Requests (P4600) 251,
 255
 Replenishment to Random Locations
 (R461602) 263, 267
 Reports
 Batch Putaway Reservations 177
 Warehouse Location Integrity 277, 280
 WMS Purge Movement
 Information 278, 282
 Repost Open Suggestions (R46995) 277,
 280
 Reposting open location suggestions 277,
 280
 Request Inquiry (P4600) 169, 180, 195,
 223, 225, 233, 256
 Requests

- pick 157, 193, 194, 195, 223
 - See Also* canceling; creating; locating; overriding the unit of measure structure; serial numbers; working with
- purging 278, 282
- putaway 153, 154, 169
 - See Also* canceling; creating; locating; serial numbers
- replenishment 249, 250, 251, 252, 253, 255
 - See Also* canceling; creating; locating; working with
- status codes 308
- Reservations
 - purging 278, 282
 - putaway 175, 176, 177
 - See Also* canceling; changing; creating; creating for all order lines; creating interactively
 - status codes 308
- Resuggest Replenishment Requests (R46171) 256, 261
- Reviewing location utilization and detail information 278, 281
- Rollup
 - setting up 272, 275
- Rules
 - freeze 272, 275
 - inclusion (F34004) 10
 - process selection 10
 - random 37, 40
 - storage 8
- Running the Carton Recommendations Report (R46151) 94
- Running the Process Pick Requests program 309
- Running the Process Putaway Requests program 309
- Running the Process Replenishment Requests program 309
- Running the Random Location Replenishment Program (R461602) 263, 267

S

- Sales Order Entry
 - processing options 196
- Sales Order Entry (P4210) 196
- Sales Order Management

- integration with Warehouse Management 5
- Sales orders 196
 - processing options 196
- Screens 5
- Selection
 - defining process selection 141
- Serial number
 - processing during shipment confirmation 235
- Serial numbers
 - moving items 146
 - overriding unit of measure structures 42
 - pick requests 194
 - putaway requests 154
- Serial Shipping Container Code (SSCC) structure 97
- Setting the process mode 148
- Setting up allowed containers for each location 62
- Setting Up Carton Charges for Expendable Containers 94
- Setting up carton fill percentages for items 70
- Setting up carton recommendation methods for items 69
- Setting Up Container Bill of Materials 65
- Setting up customer information for UCC 128 processing 98
- Setting up fixed locations and zones 34
- Setting up fixed picking locations 36
- Setting up fixed putaway locations 35
- Setting up fixed replenishment zones 36
- Setting up freeze rules 271, 275
- Setting up hierarchical configurations for UCC 128 processing 98
- Setting up inclusion rules 53
- Setting up item information for UCC 128 processing 99, 103
- Setting up Item profile information 17
- Setting up item profiles 49
- Setting Up Item Standard Packs 62
- Setting up item warehouse information 17, 41
 - item classification codes 17
 - item profile information 17
- Setting up license plate tracking numbers 272, 275
- Setting up locations 18

- Setting up locations for carton recommendation 69
- Setting up order groups 54
- Setting Up Pallet Standard Packs 64
- Setting up random requirements 36
- Setting up random rules 40
- Setting up repack 272, 276
- Setting up rollup 272, 275
- Setting up shipping cartons 67
- Setting up storage containers 56, 57
- Setting up two-phase movement confirmation 271
- Setting up UCC 128 processing 98
- Setting up unit of measure groups 55
- Setup
 - UCC 128 Processing 95
 - warehouse 13
- Shipment
 - confirming 231, 234
- Shipment Confirmation (P4205) 231, 234
- Shipments
 - Shipment Confirmation form 235
- Shipping cartons
 - defining 67
 - reorganizing 76
 - setting up fill percentages for items 70
 - setting up recommendation for items and locations 69
- Shipping Container Code (SCC)
 - aggregates 103
 - structure 96
- Shipping locations
 - overriding 227, 234
- Shop Floor Management
 - integration with Warehouse Management 6
- Size 5
- Slips
 - move slips 184, 186, 230, 234, 258, 261
- Specifications
 - warehouse 24
- Speed group maintenance
 - item dimension and warehouse process groups 276
- Staging locations 271
- Standard pack
 - pallets 58
- Standard Pack Carton Recommendations (P4615) 71

- Status codes 308
- Storage containers
 - defining 58
 - overview of setup 56
 - setting up allowed containers 62
- Subsystem processing 8
- Suggestions
 - pick 224, 225, 231, 233
 - See Also* canceling; confirming; creating
 - purging 278, 282
 - putaway 179, 180, 181, 188
 - See Also* confirming; creating
 - replenishment 256, 258, 259, 260, 261
 - See Also* canceling; confirming; creating
 - reposting open suggestions 277, 280
 - status codes 308
- suggestions, submitting xx
- Summary document 230, 234, 257, 261
- Supply/Demand Inclusion Rules (P34004) 53
- System Integration 5

T

- Tables
 - Allowed Containers by Location (F46026) 10
 - Available Space Tiebreaker (F46027) 10
 - Bulk Requests - Purged 279
 - Carton Detail Information (F4620) 76
 - Carton Recommendation Rules (F46013) 10
 - Container and Carton Codes (F46091) 10
 - Default Locations/Printers (F40095) 10
 - Demand/Supply Inclusion Rules (F34004) 10
 - Distribution/Manufacturing Constants (F4009) 10
 - Fixed Locations (F46012) 10
 - Fixed Replenishment Zones (F46051) 10
 - Inventory Constants (F41001) 10
 - Item Branch File (F4102) 10
 - Item Ledger File (F4111) 10
 - Item Location File (F41021) 10
 - Item Master (F4101) 10
 - Item Profile (F46010) 10

- Item Unit of Measure Definition (F46011) 10
- Item Units of Measure Conversion Factors (F41002) 10
- Location Capacity (F46024) 10
- Location Characteristics (F46021) 10
- Location Detail Information (F4602) 10
- Location Dimensions (F46022) 10
- Location Master (F4100) 10
- Maximum Putaway Quantity by Zone (F46025) 10
- Movement Instructions (F46095) 10
- Order Groups (F46092) 10
- Process Selection Rules (F46093) 10
- Putaway Reservations (F46130) 10
- Random Locations (F46821) 10
- Random Tables (F46822) 10
- Task Headers - Purged (F4601PU) 279
- Unit of Measure Groups (F46096) 10
- Unit of Measure Standard Conversion (F41003) 10
- Warehouse Request Tag Table - Purged 279
- Warehouse Requests - Purged (F4600PU) 279
- Warehouse Requests (F4600) 10
- Warehouse Reservations - Purged (F46130PU) 279
- Warehouse Suggestion Tag Table - Purged 279
- Warehouse Suggestions - Purged (F4611PU) 279
- Warehouse Suggestions (F4611) 10
- Warehouse Task Header (F4601) 10
- Tags
 - move tags and slips 184, 186, 230, 234, 258, 261
- Task and Trip Creation (R46471) 230
- Task and Trip Creation (R46471)" 234, 257, 261
- Tasks
 - purging 278, 282
- Tasks and trips 230, 234, 257, 261
- Tax codes
 - assigning 271, 274
- Top off percentages 147
- Tracking
 - license plate 272, 275
- Tracking numbers

- setting up 272, 275
- Transfer orders
 - described 216
- Transportation Management
 - integration with Warehouse Management 7
- Trips and tasks 230, 234, 257, 261
- Two-phase movement confirmation
 - setting up 271
- typographical conventions xviii

U

- UCC 128 Processing
 - identification codes 96
 - setup 95, 98, 99
 - See Also* customer information; hierarchical configurations; item information
- UDC 5
- Understanding UCC 128 Compliance
 - SCCs 96
 - SSCCs 97
 - UCC identification codes 96
 - UPCs 96
- Understanding warehouse setup 13
- Unit of measure
 - conversions 42
 - definition 43
 - groups 55
 - See Also* setting up
 - overrides 42, 153
 - primary 42
 - structure 42, 43, 44
- Unit of Measure Groups (P46096) 55
- Universal Product Code (UPC)
 - structure 96
- Usable cubic dimensions 19
- User defined code lists
 - Characteristic groups (46/LC) 29
 - Classification codes (41/01, 41/02) 49
 - Container/Carton Codes (46/EQ) 57
 - Inclusion versions (40/RV) 53
 - Location characteristics (46/DF) 29
 - Location dimension groups (46/LD) 27
 - Location tax codes (46/LT) 274
 - Movement instruction tables (46/IT) 141
 - Order groups (46/DT) 54
 - Order types (00/DT) 54
 - Process modes (46/PC) 141, 146

- Random rules (46/SR) 40
- Unit of measure groups (46/UG) 55
- Units of measure (00/UM) 42
- Warehouse process groups (41/02) 141
- Zones (46/ZN) 26, 36
- Utilization
 - location 278, 281

V

- visual cues xix
- Volume 5
 - calculations 270
 - checking 20, 21

W

- Warehouse
 - creating 23
 - defining specifications 24
 - definition of setup 13
 - item balance 277, 280
 - overrides 154
 - process groups 42
 - setting up 13
 - warehouse control 154
- Warehouse Location Integrity (R46990) 277, 280
- Warehouse Location Integrity report 277, 280
- Warehouse Movement Confirmations (P4617) 187, 226, 258
- Warehouse Speed Group Maintenance (P4690) 276, 280
- warnings xix
- Weight 5
 - calculations 270
- Windows 5
- WMS Purge Movement Information (R4600P) 278, 282
- Work Order Completions
 - processing options 285
- Workbench
 - cross docking 155, 168
- Working with item dimension and warehouse process groups 280
- Working with Label Information 103
- Working with pick requests 193
- Working with pick suggestions 224
- Working with putaway requests 153

- Working with putaway reservation statuses 308
- Working with putaway reservations 175
- Working with putaway suggestions 179
- Working with replenishment requests 249, 250
- Working with replenishment suggestions 255, 256
- Working with replenishment to random locations 261
- Working with request and suggestion statuses 308
- Working with Standard Pack Carton Recommendations 71

X

- XML documents 106

Z

- Zones
 - defining 26
 - defining maximum quantity 272