

Guide  
June 1996



# Advanced Warehouse Management

Release  
A7.3

**JD Edwards**®



Item # A73CEAWM960615



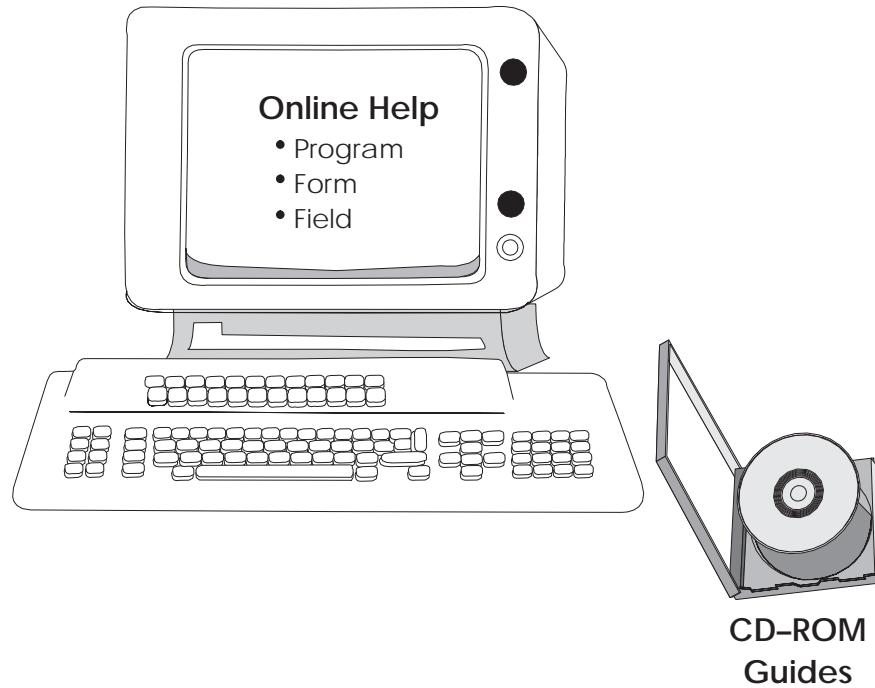
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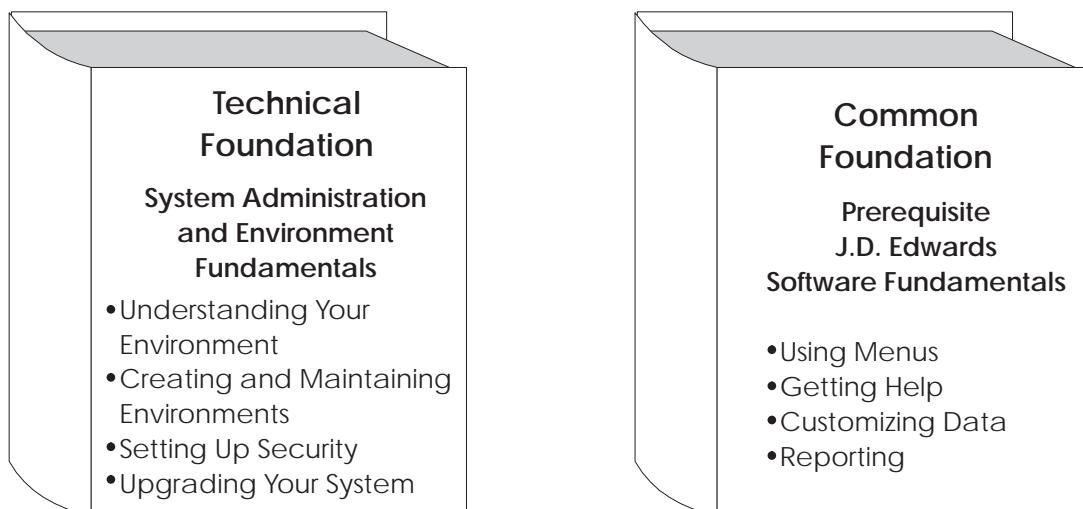
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## Where Do I Look?



## Guides





## **Important Note for Students in Training Classes**

This guide is a source book for online helps, training classes, and user reference. Training classes may not cover all the topics contained here.



# Welcome

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## About this Guide

This guide provides overviews, illustrations, procedures, and examples for release A7.3 of J.D. Edwards software. Forms (screens and windows) shown are only examples. If your company operates at a different software level, you might find discrepancies between what is shown in this guide and what you see on your screen.

This guide includes examples to help you understand how to use the system. You can access all of the information about a task using either the guide or the online help.

Before using this guide, you should have a fundamental understanding of the system, user defined codes, and category codes. You should also know how to:

- Use the menus
- Enter information in fields
- Add, change, and delete information
- Create and run report versions
- Access online documentation

## Audience

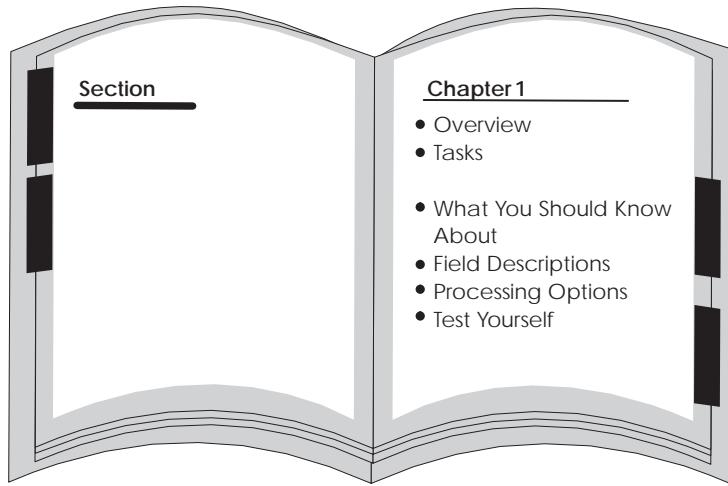
This guide is intended primarily for the following audiences:

- Users
- Classroom instructors
- Client Services personnel
- Consultants and implementation team members

## Organization

This guide is divided into sections for each major function. Sections contain chapters for each task or group of related tasks. Each chapter contains the information you need to accomplish the task, run the program, or print the

report. Chapters normally include an overview, form or report samples, and procedures.



When it is appropriate, chapters also might explain automatic accounting instructions, processing options, and warnings or error situations. Some chapters include self-tests for your use outside the classroom.

This guide has a detailed table of contents and an index to help you locate information quickly.

## Conventions Used in this Guide

The following terms have specific meanings when used in this guide:

- *Form* refers to a screen or a window.
- *Table* generally means “file.”

We assume an “implied completion” at the end of a series of steps. That is, to complete the procedure described in the series of steps, either press Enter or click OK, except where noted.

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# System Overview

## System Integration

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

The Advanced Warehouse Management system can exchange data with the following J.D. Edwards systems:

- Sales Order Management
- Inventory Management
- Purchase Management
- Shop Floor Control
- Configuration Management
- Requirements Planning
- Enterprise Facility Planning

## Features

The Advanced 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, your 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 exactly where everything is and the exact quantity you have on hand. This 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 Advanced 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
- Ability to review warehouse contents using up to nine levels of detail
- Manual or automatic storage, picking, and replenishment of stock
- Audit trail reporting of inventory movement

With the Advanced 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 storage by allowing the system to track inventory for you
- Generate an audit trail of reports for each stock movement
- Sequence your employees' trips through the warehouse to maximize their productivity
- Confirm stock movement with minimal data-entry keystrokes
- Share stock movement data with other J.D. Edwards systems to answer inquiries and improve customer service

The Advanced Warehouse Management system is extremely flexible because it can use more than fifty different parameters of locations, items, and rules to

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move your inventory. Some of Advanced Warehouse Management's features follow.

**Profiles of locations and items**

For each item and location in your warehouse, you define a profile. For items, you can define many 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 Advanced Warehouse Management system is rule-driven. You can set up movement rules that are based on a variety of factors, including:

- the sequence numbers that you can assign to locations
- each location's purpose and the quantity of items already present in the location
- location characteristics that are matched to item 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 to a point that you define.

**Movement path sequencing**

You can design traffic patterns in your warehouse to reduce congestion and structure your stock movements to use each employee's trip through the warehouse most efficiently.

**Units of measure**

You can choose locations according to the item's 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 utilization of locations.

**First In First Out picking**

You can move your oldest inventory first using date-of-receipt tags and expiration date codes.

### Detailed Information

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

<b>Branch/Plant Constants (F41001)</b>	Contains information for day-to-day transactions, including: <ul style="list-style-type: none"><li>• Location number definition</li><li>• Warehouse control data</li><li>• Default units of measure</li><li>• Inclusion rule, which lists the document types and status codes to process through the system</li></ul>
<b>Location Master (F4100)</b>	Contains basic information about each warehouse location.
<b>Location Dimensions (F46022)</b>	Contains the dimensions and maximum weight capacity of location dimension groups.
<b>Item Master (F4101)</b>	Contains basic information about each item, including: <ul style="list-style-type: none"><li>• Item number</li><li>• Description</li><li>• Search keys</li><li>• Category codes</li><li>• Default units of measure</li><li>• Process groups</li><li>• Item dimension group</li></ul>
<b>Item Specific Unit of Measure Conversion (F41002)</b>	Contains the unit of measure conversion equations that are unique to the warehouse item and its unit of measure structure information.
<b>Location Characteristics (F46021)</b>	Contains a list of characteristics that you use in random movement instructions.
<b>Location Capacity (F46024)</b>	Contains the quantity of an item (or an item group) that will fit into each location.
<b>Allowed Containers by Location (F46026)</b>	Contains a list of the containers that you allow to exist in each location.
<b>Standard Unit Of Measure Conversion (F41003)</b>	Contains the unit of measure conversion equations that are common to all warehouse items.

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<b>Item Branch (F4102)</b>	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.
<b>Item Location (F41021)</b>	Contains each item's quantity, general ledger class, and lot status in each location.
<b>Item Profile (F46010)</b>	Contains a profile of every item in the warehouse.
<b>Item Unit Of Measure Profile (F46011)</b>	Contains every unit of measure for each item in the warehouse.
<b>Warehouse Requests (F4600)</b>	Contains putaway, pick, and replenishment requests for inventory movement.
<b>Task Header (F4601)</b>	Contains inventory movement requests and the corresponding trips that warehouse employees make to fulfill the requests.
<b>Warehouse Putaway Reservations (F460130)</b>	Contains locations that you reserved for storage of a particular item.
<b>Warehouse Suggestions (F4611)</b>	Contains putaway, pick, and replenishment suggestions for inventory movement.
<b>Location Detail Information (F4602)</b>	Contains the items, quantities, and units of measure that exist in each location.
<b>Item Ledger (F4111)</b>	Contains a history of all inventory movements.
<b>Inclusion Rules (F34004)</b>	Contains the order types (sales, purchase, and so on) and the order statuses that the system processes.
<b>Process Selection Rules (F46093)</b>	Contains information about warehouse process and order groups and the movement instructions that you match to each set of groups.
<b>Movement Instructions (F46095)</b>	Contains information, such as zones and tiebreakers, about how the system chooses locations for putaway, picking, or replenishment.
<b>Order Groups (F46092)</b>	Contains order types that you assign to a group to use in the Process Selection Rules table.

<b>Unit Of Measure Groups (F46096)</b>	Contains units of measure that you assign to a group to use in the Movement Instructions table.
<b>Fixed Locations (F46012)</b>	Contains locations that you use only for putaway, only for picking, or only for replenishment.
<b>Random Tables (F46822)</b>	Contains characteristics that you match to location characteristics to create a table of valid random locations.
<b>Random Locations (F46821)</b>	Contains a list of valid random locations that match the characteristics you defined in a random rule.
<b>Container and Carton Codes (F46091)</b>	Contains a list of containers and cartons and their dimensions and weights.
<b>Carton Recommendation Rules (F46013)</b>	Contains information about the quantity of each item that will fit in each carton, so the system can recommend cartons for shipping.
<b>Maximum Putaway Quantity By Zone (F46025)</b>	Contains the maximum quantity of each item that you allow in each zone.
<b>Fixed Replenishment Zones (F46051)</b>	Contains a list of zones from which you allow the system to replenish fixed picking locations.
<b>Default Location/Printers (F40095)</b>	Contains the default warehouse code (branch/plant) and the default printer output queue for transactions that you process through the subsystem.
<b>Distribution/ Manufacturing Constants (F4009)</b>	Contains information that specifies whether the item unit of measure conversions are unique for each item or applicable to each item in the warehouse.

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## Menu Overview

These are the most commonly used menus for the J.D. Edwards Advanced Warehouse Management system.

Advanced Warehouse  
Management  
G46

### Daily Operations

Inbound Warehousing  
Operations  
G4611

Outbound Warehousing  
Operations  
G4612

Replenishment  
Operations  
G4613

Warehousing Inquiries  
& Reports  
G4614

### Setup Operations

Warehouse System  
Setup  
G4641

Warehouse User  
Defined Codes  
G46411

### Advanced and Technical Operations

Warehouse Advanced  
& Technical Operations  
G4631

Warehousing  
Movement Rules  
G46311



# Setup



# Warehouse Setup

## Objectives

- To define the physical warehouse for the system
- To define warehouse-specific information about each item
- To define which orders to process based on the order status

## About Warehouse Setup

To set up your warehouse, you must consider the following information:

- The physical layout and characteristics of your warehouse
- The dimensions and capacities of all storage areas or racks
- The characteristics of all items that you stock, such as dimensions, weight, units of measure, special environmental requirements, and so on

You must also determine:

- Whether to group items based on similarities, dimensions, or units of measure
- Whether to have the system choose containers for certain items during putaway or cartons during picking
- Which factor is more 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 during putaway, picking, or replenishment of stock
  - Using other criteria that you define

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

Defining the warehouse includes the following tasks:

- Setting up locations



- Setting up fixed locations and zones
- Setting up item warehouse information
- Setting up inclusion rules
- Setting up order groups
- Setting up unit of measure groups (optional)
- Setting up storage containers (optional)
- Setting up shipping cartons and recommendation (optional)

# **Set Up Locations**

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## **Setting Up 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
- Temperature
- Humidity
- Lighting

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 items' size, weight, and special needs like temperature or lighting.

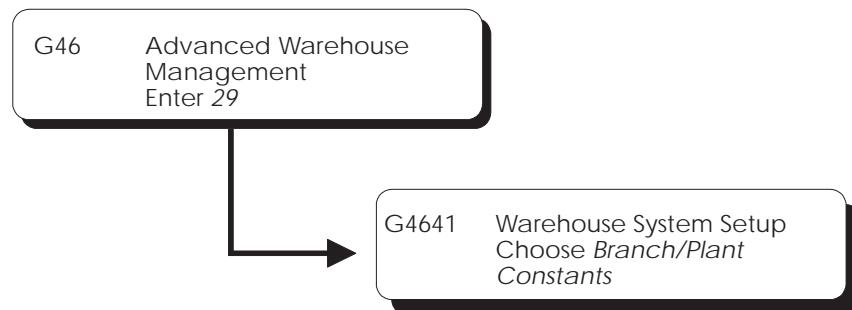
Location setup includes:

- Creating the warehouse
- Defining warehouse specifications
- Entering locations
- Defining location dimensions
- Defining location characteristics
- Defining location profile information
- Defining location capacity

## Before You Begin

- Verify that you have identified each location's characteristics, dimensions, and physical position in the warehouse

## Creating the Warehouse

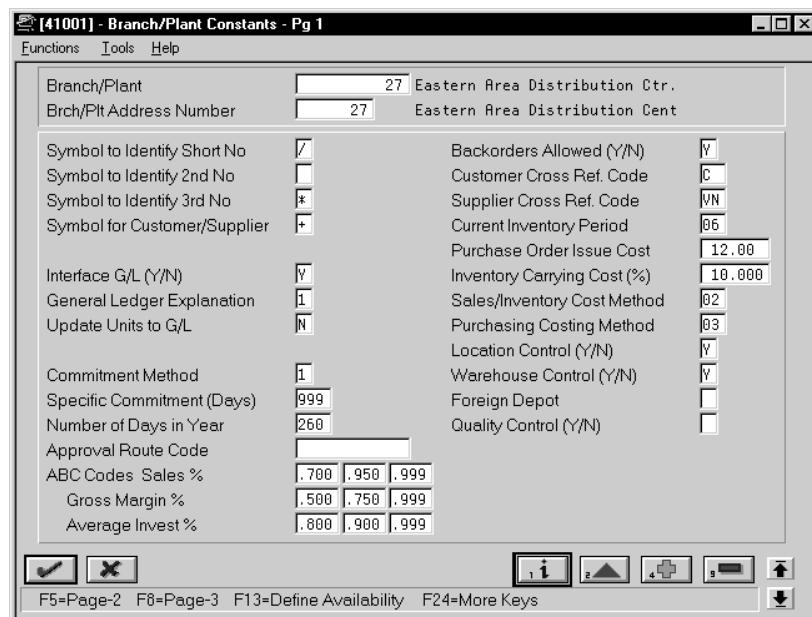


To create your warehouse, you use branch/plant constants. You specify whether you want the system to track locations and their contents.

### ► To create the warehouse

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On Branch/Plant Constants – Pg 1



Complete the following fields:

- Location Control
- Warehouse Control

Field	Explanation
Location Control	<p>A code that indicates what 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.</p> <p>Valid codes are:</p> <p>Y Yes, use only locations in Location Master (F4100).</p> <p>N No, do not restrict locations to those in Location Master. Use all locations, as long as they conform to the location format defined on Branch/Plant Constants – Page 2.</p> <p>If Warehouse Control is set to Yes, Location Control also must be set to Yes.</p>
Control Code – Warehouse Management	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

You define warehouse specifications to:

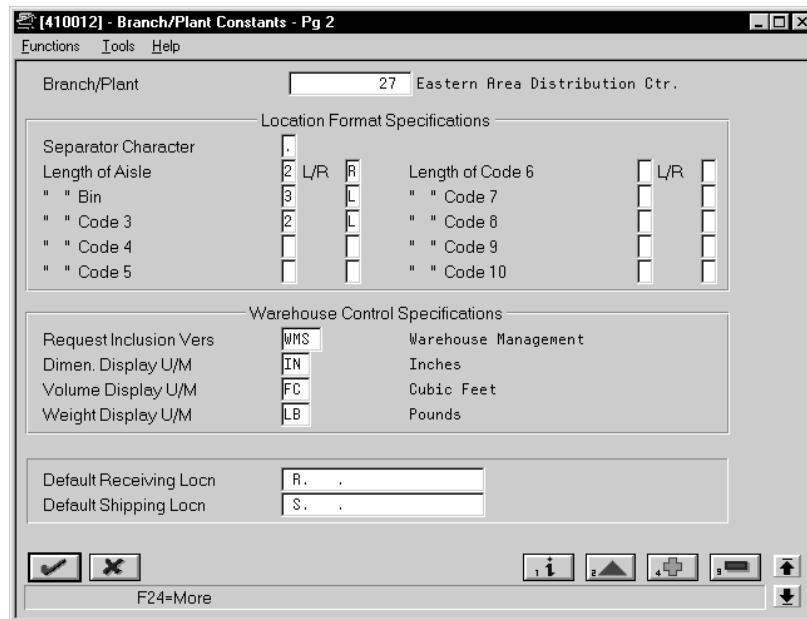
- Define the format in which the system displays a location, such as 1.A.1 or C/3/5
- Specify the inclusion rule that defines the orders and statuses that you want the Advanced Warehouse Management system to process
- Define the default units of measure for dimensions, weight, and volume
- Define the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

You use an inclusion rule (also known as the request inclusion version) to define which orders to process based on the next status code that is assigned to the order.

## ► To define warehouse specifications

On Branch/Plant Constants – Pg 1

1. Access Branch/Plant Constants – Pg 2.



2. On Branch/Plant Constants – Pg 2, complete the following fields:

- Separator Character
- Length of Aisle
- Justify
- Length of Bin
- Justify
- Length of Code 3
- Justify
- Length of Code 4
- Justify
- Length of Code 5
- Justify
- Length of Code 6
- Justify
- Length of Code 7

- Justify
- Length of Code 8
- Justify
- Length of Code 9
- Justify
- Length of Code 10
- Justify

3. Complete the following fields:

- Request Inclusion Version
- Dimension Display Unit of Measure
- Volume Display Unit of Measure
- Weight Display Unit of Measure
- Default Receiving Location
- Default Shipping Location

<b>Field</b>	<b>Explanation</b>
Separator Character	<p>A character that divides the elements of the location when you display them on forms or reports.</p> <p>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. The system displays the location as one string of characters.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The system uses the character you enter in this field to separate the combination of tank/owner and aisle/bin when displayed on forms or reports. Companies commonly use a period (.) as the separator character.</p>
Length	Identifies the number of characters to represent the tank (or aisle for packaged stock). Valid values are numbers 1 through 8.
L/R	A character (L or R) that specifies left or right justification for Aisle in the location format.
Length of Bin	Identifies the number of characters to represent the owner for commingled bulk stock (or aisle for packaged stock). Valid values are numbers 1 through 8.
Justify – Bin	Left or Right justification for Bin in the location format specification.

Field	Explanation
Number – Characters (Code 3)	The number of characters to represent Code 3 in the location format specification.
Justify – Code 3	Left or Right justification for Code 3 in the location format specification.
Number – Characters (Code 4)	The number of characters to represent Code 4 in the location format specification.
Justify – Code 4	Left or Right justification for Code 4 in the location format specification.
Number – Characters (Code 5)	The number of characters to represent Code 5 in the location format specification.
Inclusion Version	<p>A user defined code (system 40/type RV) that identifies an inclusion rule that you want the system to use for this branch/plant. The Manufacturing and Advanced Warehouse Management systems use inclusion rules as follows:</p> <ul style="list-style-type: none"> <li>• For Manufacturing           <p>Allows multiple versions of resource rules for running MPS, MRP, or DRP.</p> </li> <li>• For Advanced Warehouse Management           <p>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.</p> </li> </ul>
Justify – Code 5	Left or Right justification for Code 5 in the location format specification.
Number – Characters (Code 6)	The number of characters to represent Code 6 in the location format specification.
Justify – Code 6	Left or Right justification for Code 6 in the location format specification.
Number – Characters (Code 7)	The number of characters to represent Code 7 in the location format specification.
Justify – Code 7	Left or Right justification for Code 7 in the location format specification.
Number – Characters (Code 8)	The number of characters to represent Code 8 in the location format specification.
Justify – Code 8	Left or Right justification for Code 8 in the location format specification.
Number – Characters (Code 9)	The number of characters to represent Code 9 in the location format specification.
Justify – Code 9	Left or Right justification for Code 09 in the location format specification.

Field	Explanation
Number – Characters (Code 10)	The number of characters to represent Code 10 in the location format specification.
Justify – Code 10	Left or Right justification for Code 10 in the location format specification.
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.
Unit of Measure – Volume Display	A user defined code (system 00/type 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.
Unit of Measure – Weight	A user defined code (system 00/type UM) that identifies the unit of measure that the system uses to display 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	A code that identifies the location that the system uses for receiving goods into the warehouse. This location defaults into purchase order detail lines for the item. You can define this location as a staging location (a location that has unlimited space) through Location Profile (P46020).
Shipping Location	A code that identifies the location that the system uses for packing and shipping goods out of the warehouse. You can define this location as a staging location (a location that has unlimited space) through Location Profile (P46020).

## Entering Locations

Your warehouse consists of locations, such as bins, spaces on a rack, pallet spaces on the floor, and so on. You must enter these locations into the system to use them for putaway, picking, or replenishment. Use the format that you specified on Branch/Plant Constants to enter each location where you store inventory in your warehouse.

Complete the following tasks:

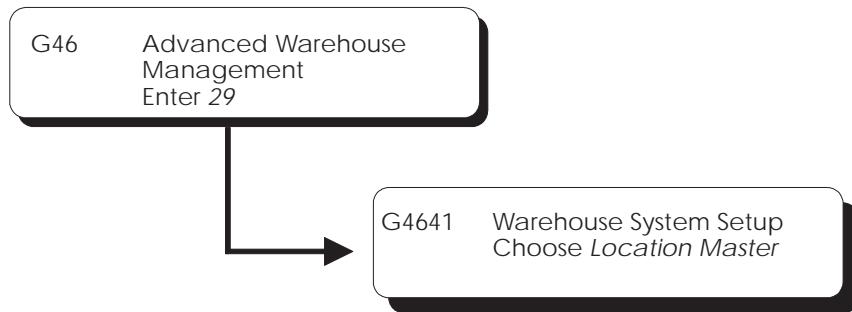
- Enter locations interactively
- Enter locations by batch

- Enter locations using existing location data
- Define zones
- Define the level of detail for locations

### See Also

- *Setting Up Warehouse Locations* in the *Inventory Management Guide* for information on entering locations

### Entering Locations Interactively

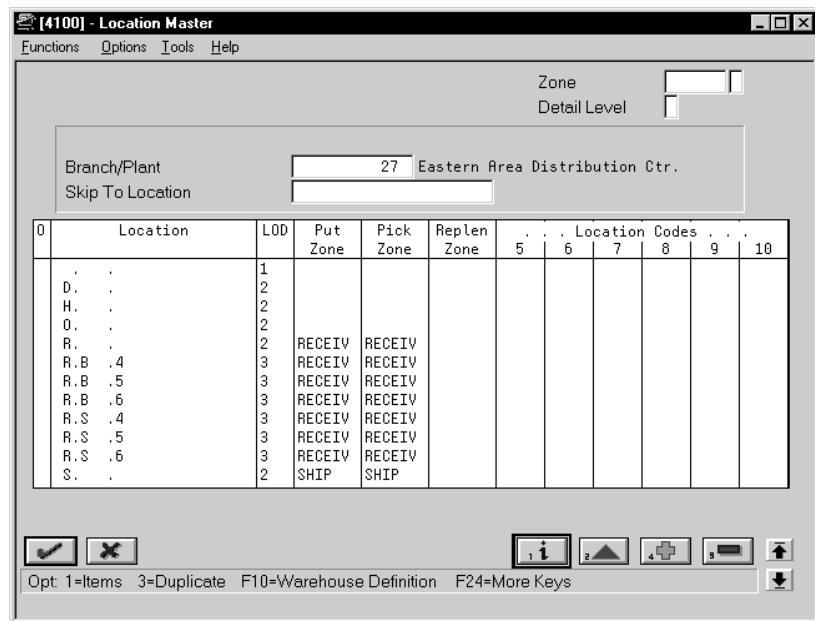


You can enter locations interactively to create locations one at a time. You choose the naming convention (a combination of numbers, letters, or both, such as A/3/4, 6/B/2/A, and so on), and use the format that you specified on Branch/Plant Constants (a separator character, such as / or ., to name locations A/3/4 or 3.C.9). You enter locations interactively if you have only a few locations to create, or if you do not want to use the batch process.

#### ► **To enter locations interactively**

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On Location Master

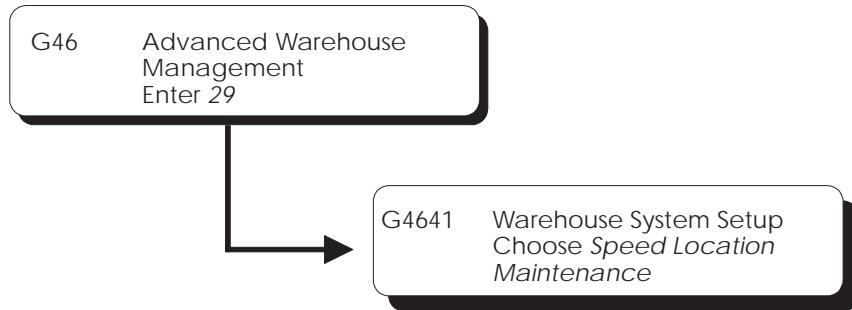


Complete the following field:

- Location

Field	Explanation
Location	<p>A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant (P410012).</p> <p>..... <i>Form-specific information</i> .....</p> <p>A location format is comprised of 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.</p> <p>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.</p> <p>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.</p> <p>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.</p>

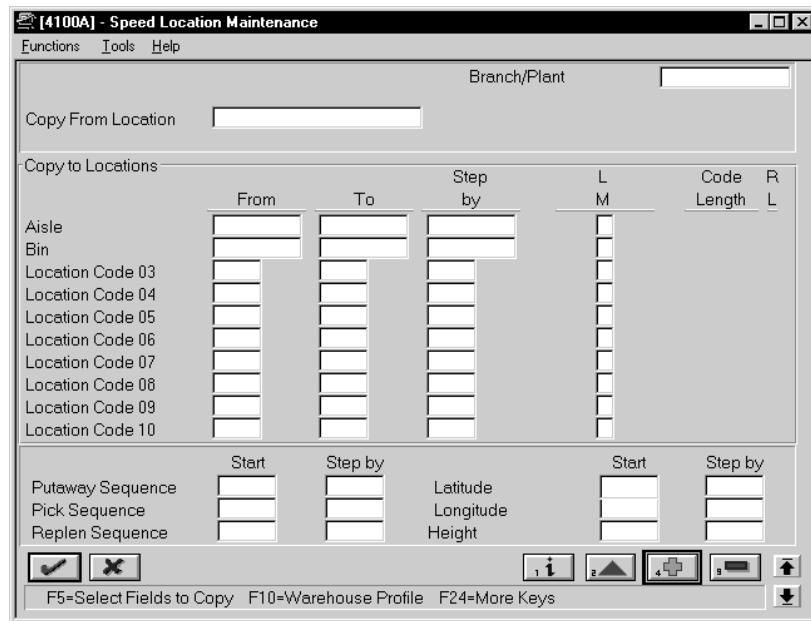
### Entering Locations by Batch



You can enter locations in batches instead of individually. This allows you to set up your warehouse quickly by copying an existing location to create new locations. You specify the range of locations to create (starting and ending at locations that you define) and the incremental value that separates each location. This method is much faster than entering locations interactively (one at a time). However, if any errors exist in the original location, you will duplicate them in each new location.

► **To enter locations by batch**

On Speed Location Maintenance



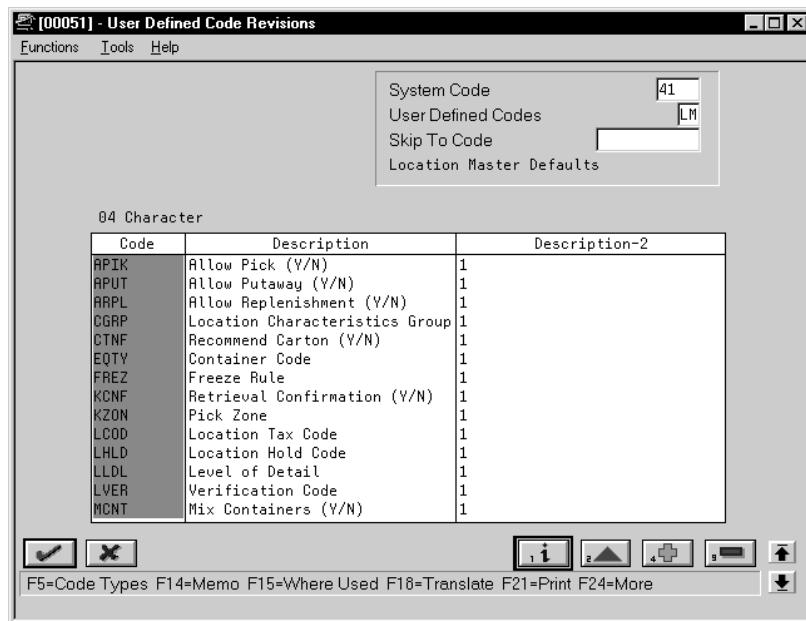
1. To identify the location to use as a model for new locations, complete the following fields:
  - Branch/Plant
  - Copy From Location
2. To enter new locations, complete the following fields:
  - From Aisle
  - To Aisle
  - Step By
  - Limit Method
  - From Bin
  - To Bin
  - Step By
  - Limit Method
3. To specify levels of detail for each location, complete the following fields:
  - From Location Code
  - To Location Code
  - Step By Location Code

- Limit Method

4. To specify the sequence and proximity information for each location, complete the following fields:

- Start Putaway Sequence
- Step By Putaway Sequence
- Start Pick Sequence
- Step By Pick Sequence
- Start Replenishment Sequence
- Step By Replenishment Sequence
- Start Latitude
- Step By Latitude
- Start Longitude
- Step By Longitude
- Start Height
- Step By Height

5. Access User Defined Code Revisions.



6. On User Defined Code Revisions, complete the following field for each value you want to copy from the model location:

- Description – 2

If you leave the field blank, the system inputs the default value. If a default value does not exist, the system leaves the field blank for an alphabetic value or inputs a zero for a numeric value.

7. Access Speed Location Maintenance.
8. On Speed Location Maintenance, choose Add/Change Locations to create the new locations.

Field	Explanation
Location	A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant (P410012).
From/To	A code that identifies a location in a warehouse. This code is used in conjunction with a bin and lot identifier, to indicate a specific, tangible storage area within a warehouse or yard.
Bin	A specific storage location within a warehouse or store. The system uses the bin with an aisle location to identify a storage area whose width, depth, and height can be readily measured.
Category Code – Location 03	A code that the system uses for one of two purposes: <ul style="list-style-type: none"> <li>• To identify a specific location within a Branch/Plant as part of the location identifier.</li> <li>• To use as a general reporting code for location information.</li> </ul>
Step By	A number that separates locations within a specified range of locations. The step can be a numerical or alphabetical increment. You use a step number when you create locations using Speed Location Maintenance (P4100A). <p>For example:</p> <p>To create new locations:            From Location: 1            To Location: 7            Step by: 2</p> <p>The new locations are: 1, 3, 5, and 7.</p>

Field	Explanation
Step Limit Method	<p>A code that indicates what limits are used in the stepping process:</p> <ul style="list-style-type: none"> <li>blank Upper &amp; Lower Limit. You create location codes beginning with the From value, ending with the To value, then starting again at the From value.</li> <li>1 Upper Limit. You create location codes beginning with the From value, ending with the To value, then starting again at the lowest value for that location code.</li> <li>2 Lower Limit. You create location codes beginning with the From value, ending with the highest value for that location code, then starting again at the From value.</li> <li>3 No Limit. You create location codes beginning with the From value, ending with the highest value for that location code, then starting again at the lowest value for that location code.</li> </ul>
Putaway Sequence Code	<p>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.</p>
Picking Sequence Code	<p>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.</p>
Replenishment Sequence Code	<p>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.</p>

Field	Explanation
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.
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.
Height	The Z or height 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.

## What You Should Know About

### Entering steps

A step is a number that the system uses to separate locations within the range of locations you are creating. When the system creates each new location, it increments the name of each location by the step number that you enter. You can enter many locations simultaneously by entering a range of locations along with a step increment.

### Entering limits

A limit is a code that tells the system the location names at which you want to start and stop entering locations, such as 1/A/1 to 1/A/9, according to the minimum and maximum values for location elements.

### Deleting incorrect locations

If you make a mistake in setting up your locations with Speed Location Maintenance, you can:

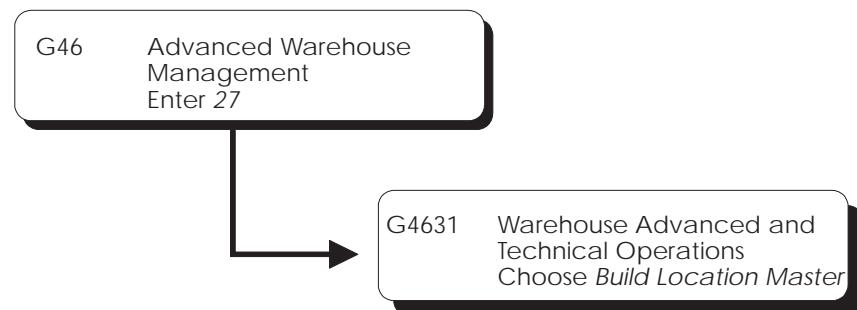
- Delete your mistakes on a location-by-location basis, assuming only a few errors exist.
- Delete an entire range of locations and create them again, if many errors exist.

You cannot delete locations using Speed Location Maintenance. You must use Location Master.

## See Also

- *Setting Up Locations Using Speed Location Maintenance* in the *Inventory Management Guide* for more information on entering locations by batch

## Entering Locations Using Existing Location Data



Use the Build Location Master program to update the Location Master table (F4100) with information from existing records in the Item Location table (F41021). This saves time in creating or changing locations, because Item Location contains all of the valid locations for your warehouse. The system prints a report that lists the updated locations and detailed information.



You should run this batch program only once, during initial system setup. Do not run the program again after setup.

Build Location Master is a DREAM Writer program.

**CAUTION:** You should run this batch program only once, during initial system setup. Do not run the program again after setup.

Branch/Plant	Location	Item Number	Description	Page No. . . . .	Date - . . . . .
41820			J.D. Edwards & Company Build Location Master	4	14.05.98
	1 .A .1	V001	Natureway High Energy Vitamins	Item/UOM	Structure Not Defined
	1 .B .1	P002	Green Bar - Continuous Form	Item/UOM	Structure Not Defined
	1 .B .2	1001	Pen & Pencil Set	Item/UOM	Structure Not Defined
	1 .C .1	TS002	Air-Shaq Children's X-Trainer	Item/UOM	Structure Not Defined

## Processing Options for Build Location Master

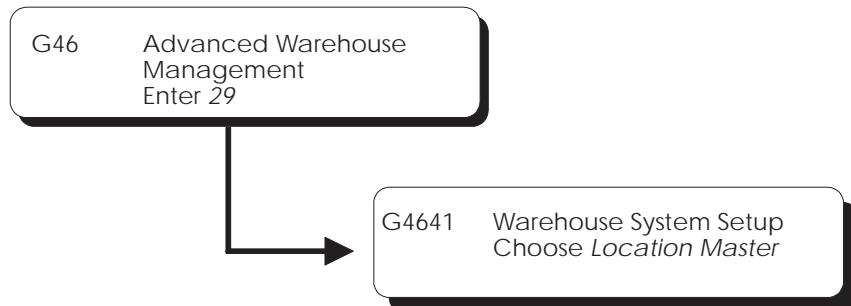
### Update Option:

1. Enter a '1' to update locations that already exist with data dictionary default values.

### Warehouse Management:

2. Enter a '1' to create Location Detail records (file F4602) for item location information.
3. Enter a '1' to apply the item's default unit of measure structure.

## Defining 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 most common zones you use in a warehouse are for putaway, picking, and replenishment. You can also use zones to set up special areas for items that require explosion safeguards, refrigeration, low humidity, low light, and so on.

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

You choose a zone name from User Defined Code Revisions. If the predefined zones do not meet your needs, you enter a new zone on User Defined Code Revisions and then reference that zone name on Location Master.

### ► To define zones

On Location Master

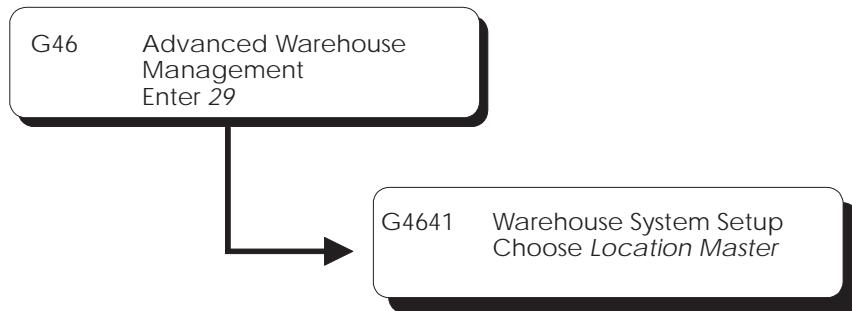
Complete the following fields:

- Putaway Zone

- Pick Zone
- Replenishment Zone

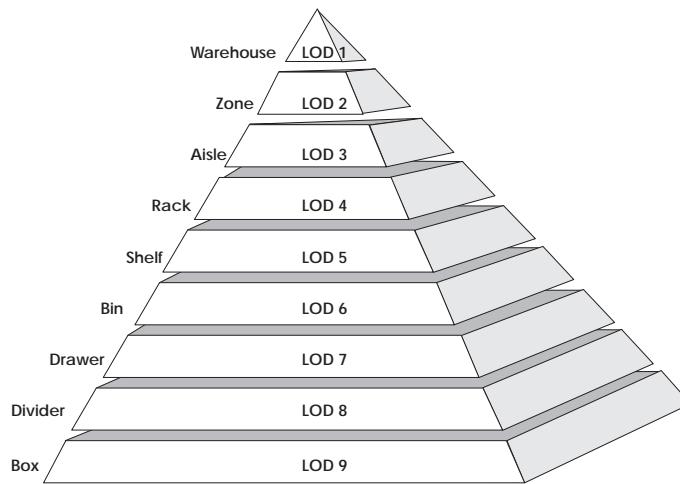
Field	Explanation
Putaway Zone	A code (system 46/type ZN) that identifies areas in the warehouse where goods are put away or stored. ..... <i>Form-specific information</i> ..... <ul style="list-style-type: none"><li>• Use the Zone field to indicate a specific zone for which you want to display information.</li><li>• Use the Putaway Zone field to set up or review the putaway zone associated with the location.</li></ul>
Picking Zone	A code (system 46/type ZN) that identifies an area from which items are picked for shipment.
Replenishment Zone	A code (system 46/type ZN) that identifies the areas in the warehouse from which items are retrieved to replenish or refill picking locations.

### Defining the Level of Detail for Locations



You use levels of detail to control how the system displays storage areas and their capacities and available space. You define what each level of detail represents (aisles, racks, bins, and so on). For example, if you use Location Utilization 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 specifies capacities and available space for each rack.

NOTE: You define what each level of detail represents (aisles, racks, bins, and so on).



► **To define the level of detail for locations**

On Location Master

For each location, complete the following field:

- Level Of Detail

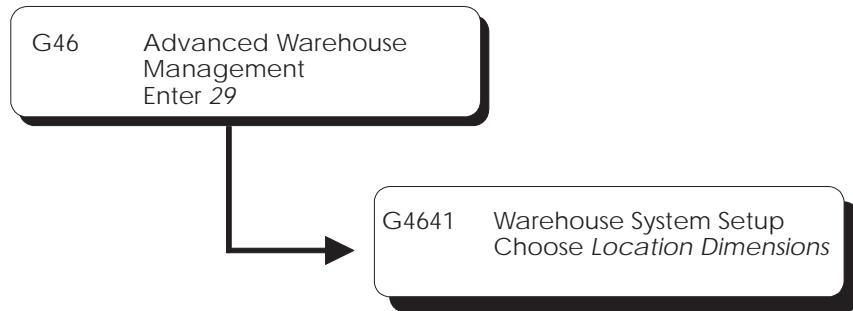
Field	Explanation
Location Level of Detail	<p>A code that summarizes or classifies locations and provides a hierarchy of locations for inquiry purposes. For instance, you can assign aisles to level 3, and individual racks within the aisle as level 4.</p> <p>..... <i>Form-specific information</i> .....</p> <p>Use the Detail Level field in the upper-right corner of the form to specify the beginning level of detail that you want the system to display.</p> <p>Use the Level of Detail field in the lower portion of the form to identify the level of detail for the location.</p>

### What You Should Know About

#### Using blank locations

You should create a blank location, such as / /, and assign it a level of detail of 1. You use Level 1 to review the contents of the entire warehouse for reporting purposes.

### Defining Location Dimensions



You define each location's dimensions to maximize the system's use of your warehouse's space. After you define a location's dimensions, 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

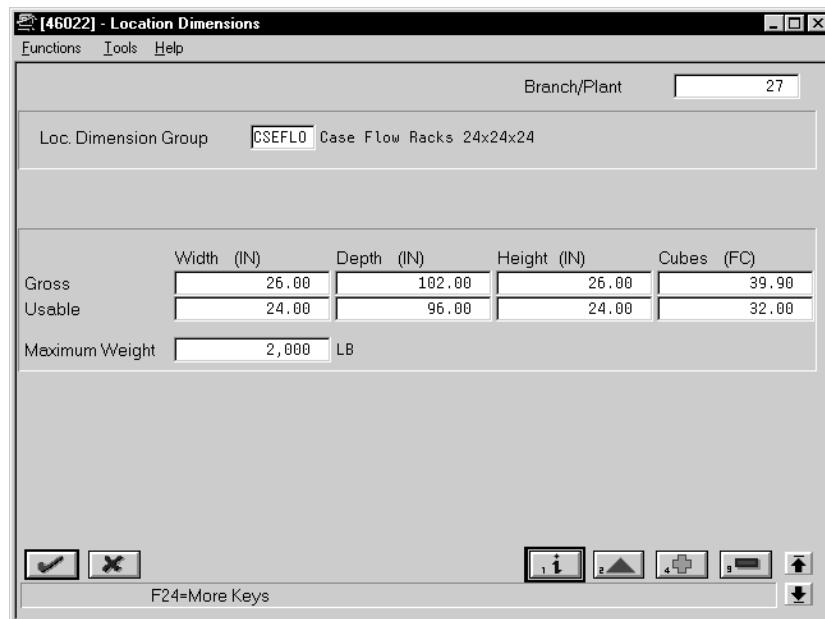
#### Before You Begin

Verify that you have set up warehouse controls for default dimension information on Branch/Plant Constants – Pg 2.

#### ► **To define location dimensions**

---

On Location Dimensions



1. Complete the following fields:

- Branch/Plant
- Location Dimension Group
- Gross Width
- Gross Depth
- Gross Height
- Usable Width
- Usable Depth
- Usable Height

2. Complete the following optional field:

- Maximum Weight

Field	Explanation
Location Dimension Group	<p>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 Detail (P460201).</p> <p>You must define location dimensions if you plan to use volume-based putaway.</p>

Field	Explanation
Gross Width	The gross width of the location(s) defined within the location dimension group, the gross width of an item as defined in the Unit Of Measure Definition (by item or group), or the gross width of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).
Gross Depth	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 is defined in Branch/Plant Constants – Page 2 (P410012).
Gross Height	The gross height of the location(s) defined within the location dimension group, the gross height of an item as defined in the Unit Of Measure Definition (by item or group), or the gross height of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).
Gross Cubic Dimensions	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).
..... <i>Form-specific information</i> .....	
	If you leave this field blank, the system calculates cubic dimensions based on the numbers you entered for the width, depth, and height.
Usable Width	<p>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:</p> <ul style="list-style-type: none"> <li>• Volume checking (where the system compares the volume of the item to the usable volume of a putaway location)</li> <li>• Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location)</li> </ul>
..... <i>Form-specific information</i> .....	
	If you leave this field blank, the system uses the number you entered in the Gross Width field.

Field	Explanation
Usable Depth	<p>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:</p> <ul style="list-style-type: none"> <li>Volume checking (where the system compares the volume of the item to the usable volume of a putaway location)</li> <li>Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location)</li> </ul> <p>..... <i>Form-specific information</i> .....</p> <p>If you leave this field blank, the system uses the number you entered in the Gross Depth field.</p>
Usable Height	<p>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:</p> <ul style="list-style-type: none"> <li>Volume checking (where the system compares the volume of the item to the usable volume of a putaway location)</li> <li>Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location)</li> </ul> <p>..... <i>Form-specific information</i> .....</p> <p>If you leave this field blank, the system uses the number you entered in the Gross Height field.</p>
Usable Cubic Dimensions	<p>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).</p> <p>..... <i>Form-specific information</i> .....</p> <p>If you leave this field blank, the system calculates cubic dimensions using the numbers you entered for the width, depth, and height.</p>
Amount – Maximum Weight	<p>The maximum weight a location can hold. During putaway location selection, the system accumulates item and/or container weights, which it adds to the weight currently available in the location, and compares the total to this maximum allowed weight.</p>

### What You Should Know About

#### Maximum storage weight

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

#### Capacity checking

The system uses location dimensions to verify that the location has enough space for the item to fit. You can use volume checking (capacity method 1) or layering (capacity method 2) for an item's unit of measure definition, as follows:

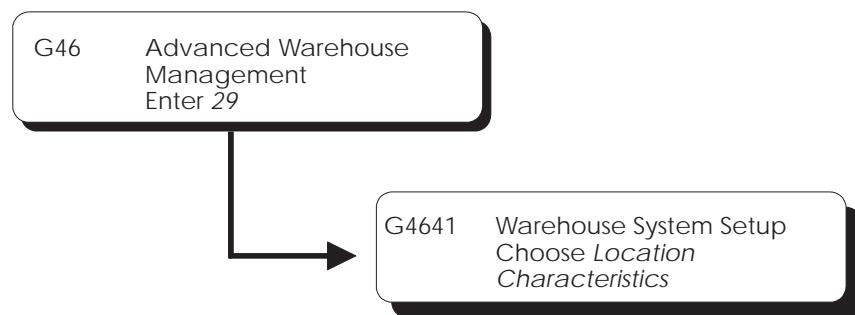
- In volume checking, the system compares the item's volume to the available volume of space in the location. This might not work well if the item or the available space is not cubical in shape.
- In layering, the system compares the item's length, width, and height to the length, width, and height of the available space in the location. This method provides the best match of an item to a location.

You define the capacity method on Unit of Measure Definition.

### See Also

- *Defining Warehouse Specifications* for more information about processing methods

### Defining 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 can identify locations, such as a refrigerator, whose characteristics include cold. You can assign an unlimited number of characteristics to each location in your warehouse.

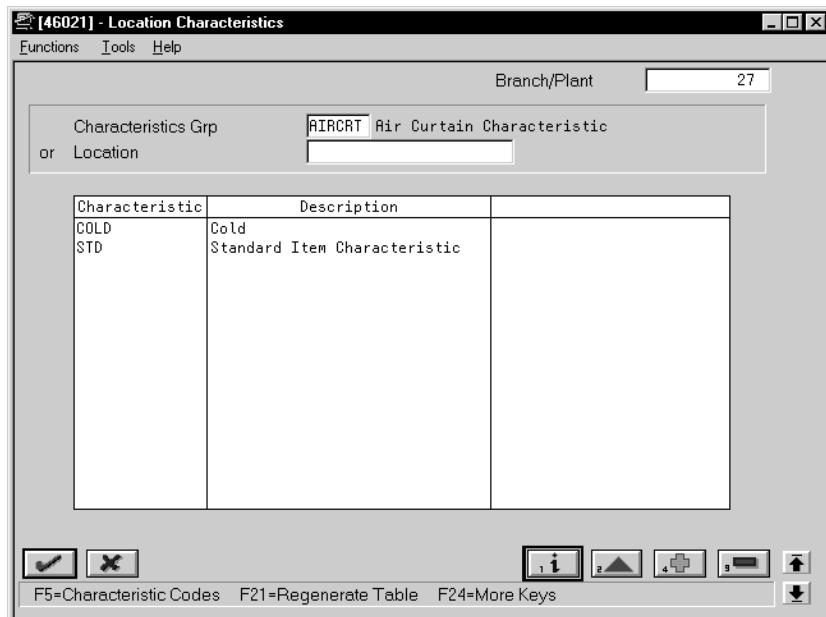
If you want the system to choose locations randomly for putaway, picking, or replenishment (instead of using fixed locations), you must define location characteristics.

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

You can:

- Define characteristics for a single location
- Define characteristics for a location group

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



## What You Should Know About

### Regenerating the Random Locations table

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). This ensures that the system uses a current table when it searches for random locations.

### ► **To define characteristics for a single location**

---

On Location Characteristics

Complete the following fields:

- Branch/Plant
- Location
- Characteristic

Field	Explanation
Location	A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant (P410012).
Characteristic Definition	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.

### ► **To define characteristics for a location group**

---

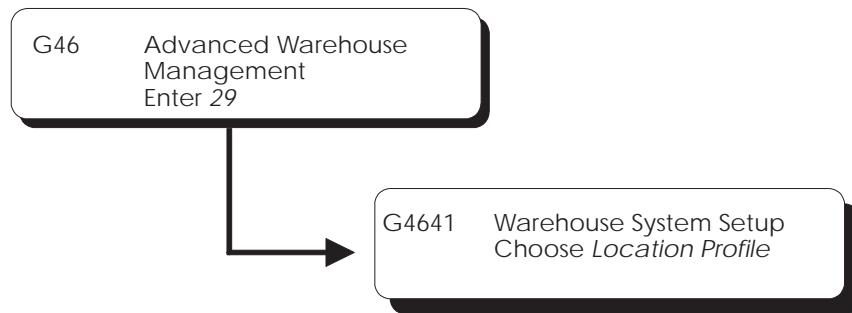
On Location Characteristics

Complete the following fields:

- Branch/Plant
- Characteristics Group
- Characteristic

Field	Explanation
Location 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).
Characteristic Definition	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.

## Defining Location Profile Information



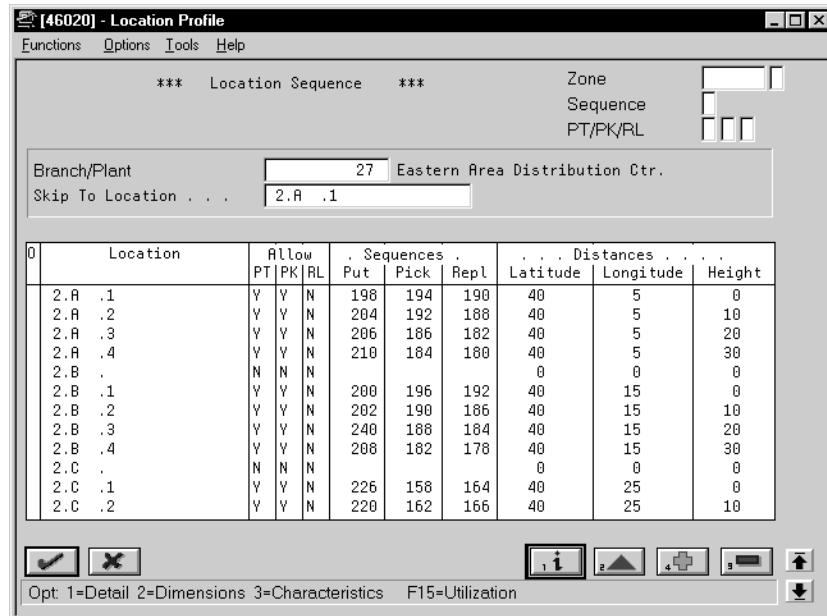
You define location profile information to attach specific attributes to each location. These attributes define the location's purpose, and its physical position in the warehouse. The system can use these attributes during inventory movement to choose locations for putaway, picking, or replenishment,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

You define:

- 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 movement

### ► **To define location profile information**

On Location Profile



1. For each location in your warehouse, complete the following fields:

- Allow Putaway
- Allow Pick
- Allow Replenishment
- Putaway Sequence
- Pick Sequence
- Replenishment Sequence
- Latitude
- Longitude
- Height

2. Access Location Profile Detail.

**[460201] - Location Profile Detail**

Functions Tools Help

Branch/Plant 27

Location 2.8 .1

Level of Detail	4	Loc. Dimension Group	DDPS	Double Wide Double D
Staging Locn (Y/N)	N	Characteristics Grp	FL00R	Floor Characteristic
Recommend Crt (Y/N)	N	Loc. Tax Code		
Mix Containers (Y/N)	Y	Allowed Containers		
Mix Dates/Lots (Y/N)	Y	Minimum Putaway %		
Max No. of Items		Minimum Pick %		
Freeze Rule		Verification Code		
Allow Putaway (Y/N)	Y	Putaway Zone / Stage	FL00R	. . .
Allow Pick (Y/N)	Y	Picking Zone / Stage	FL00R	. . .
Allow Replen (Y/N)	N	Replen. Zone / Stage	FL00R	. . .
Putaway Sequence	198	Latitude	40	
Pick Sequence	194	Longitude	5	
Replen Sequence	190	Height	0	

F5=Allowed Containers F6=Define Containers F10=Dimensions F24=More

3. On Location Profile Detail, complete the following fields:

- Location Dimension Group
- Characteristics Group
- Staging Location
- Mix Containers
- Mix Dates/Lots
- Maximum Number of Items

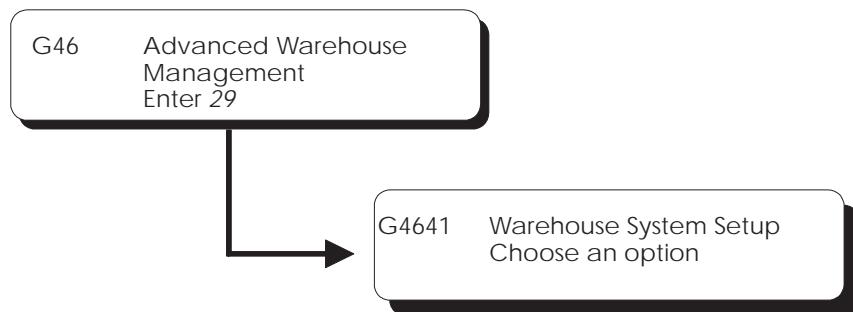
Field	Explanation
Allow Putaway	<p>A code that indicates whether the location is valid for putaway selection.</p> <p>Valid codes are:</p> <p>Y Yes, use this location for putaway N No, do not use this location for putaway</p> <p>..... <i>Form-specific information</i> .....</p> <p>During an inquiry, enter Y in the Allow Putaway field in the upper-right corner of the form to specify that you want to review only locations that allow putaway.</p> <p>Use the Allow Putaway field in the lower portion of the form to assign the putaway attribute to a location. If you enter Y in this field or leave it blank, you indicate that you want the system to use this location for putaway. An N indicates you do not want to use the location for putaway.</p>

Field	Explanation
Allow Pick	<p>A code that indicates whether this location is valid for picking.</p> <p>Valid codes are:</p>
	<p>Y Yes, use this location for picking      N No, do not use this location for picking</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>During an inquiry, you can enter Y in the Allow Pick field in the upper-right portion of the form to specify that you want to review only locations that allow picking.</p>
	<p>Use the Allow Pick field in the lower portion of the form to assign the picking attribute to a location.</p>
	<p>Valid codes are:</p>
	<p>Y Yes, use this location for picking      N No, do not use this location for picking</p>
	<p>If you leave this field blank, the system assumes Y.</p>
Allow Replenishment	<p>A code that indicates whether you allow replenishment from a location (Location Profile (P46020) and Location Profile Detail (P460201)) or whether a picking instruction triggers replenishment (Picking Instructions (P46095)).</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>During an inquiry, enter Y in the RL (Allow Replenishment) field in the upper-right corner of the form to specify that you want to review only locations that allow replenishments.</p>
	<p>Use the Allow RL (Allow Replenishment) field in the lower portion of the form to assign the replenishment attribute to a location.</p>
	<p>Valid codes are:</p>
	<p>Y Yes, use this location for replenishment      N No, do not use this location for replenishment</p>
	<p>If you leave this field blank, the system assumes Y.</p>
Putaway Sequence Code	<p>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.</p>

Field	Explanation
Picking Sequence Code	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.
Replenishment Sequence Code	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.
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.
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.
Height	The Z or height 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.
Location 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).

Field	Explanation
Mix Containers (Y/N)	<p>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:</p> <p>Y      Allow more than one type of container in this location</p> <p>N      Do not allow more than one type of container in this location</p> <p>You use Allowed Containers (P46026) to define which containers are allowed in the location.</p> <p>You must also set up the item profile to allow mixing of containers.</p>
Mix Dates / Lots	<p>A code that indicates whether you want the system to store items with different receipt dates or different lots in the same location.</p> <p>Valid codes are:</p> <p>Y      Yes, store items with different receipt dates or lots in the same location</p> <p>N      No, do not store items with different receipt dates or lots in the same location</p> <p>You must set up the location profile and the item profile to allow mixing of dates and lots.</p>
Maximum Number of Items	<p>A number that specifies the maximum number of different items that can be stored in this location at one time.</p> <p>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.</p>

## Defining Location Capacity



Each location has a finite capacity to hold items (except for staging locations). You can categorize your locations by location dimension group, such as bin, flow rack, pallet, or bulk, according to the size of the locations. Or, you can

define each location's capacity individually. You then define how many items will fit in each location or location dimension group.

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

- Volume, where the system compares the item's cubic dimensions with the available cubic dimensions in the location.
- Layering, where the system 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, where 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 Capacity Definition by Item or Group to define the quantity of the item that will fit into a location group's dimensions.

Defining quantities by item dimension group is faster, because you do not have to define quantities and capacities for every item that you stock.

You can:

- Define location capacity by item
- Define location capacity by item dimension group

### What You Should Know About

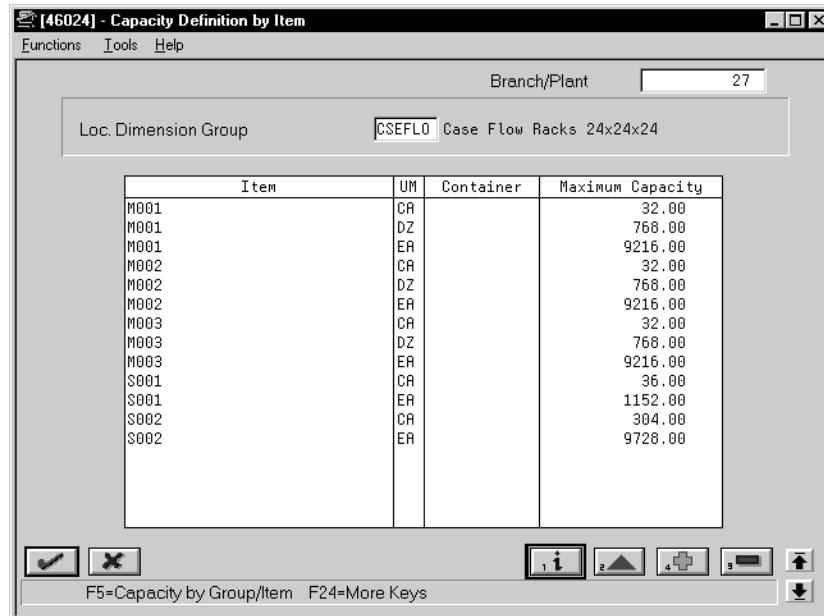
#### **Setting the type of capacity checking**

When you define units of measure by item or by item group, you can set the type of capacity checking to use. You can check a location's capacity by volume, layering, or quantity. You use capacity definition by item only if you use quantity capacity checking.

#### **To define location capacity by item**

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On Capacity Definition by Item



Complete the following fields:

- Branch/Plant
- Location Dimension Group
- Item Number
- Unit of Measure
- Container Code
- Maximum Capacity

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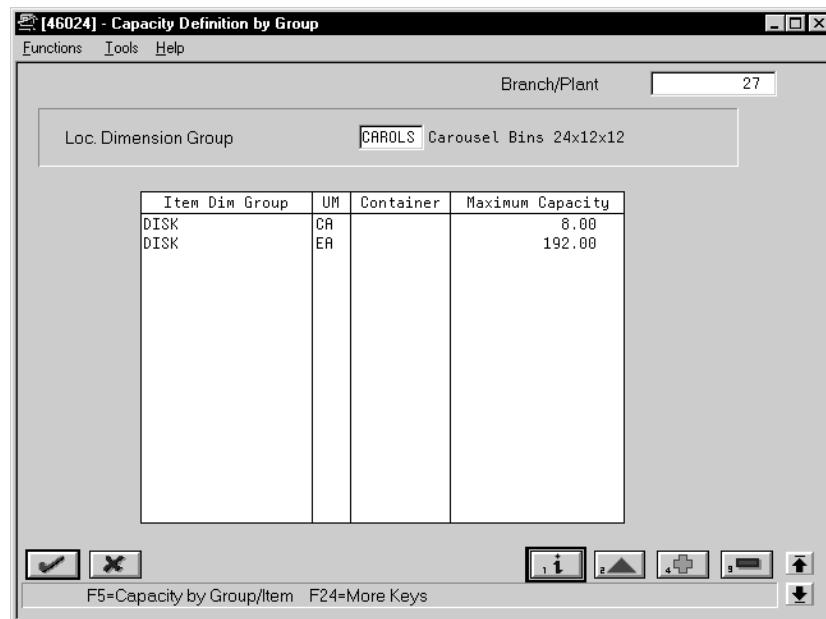
Field	Explanation
Location Dimension Group	A code (system 46/type LD) that identifies a group of locations that share the same dimensions. A location dimension group defines the dimensions for all locations that belong to the group. After you set up a location dimension group, you can assign locations to the group through Location Profile Detail (P460201).  You must define location dimensions if you plan to use volume-based putaway.
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
Unit of Measure	A user defined code (system 00/ type UM) that indicates in what quantity an inventory item is expressed; for example, CS (case) or BX (box).

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Field	Explanation
Container Code	A code (system 46/type 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 Container and Carton Codes (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.

### ► To define location capacity by item dimension group

On Capacity Definition by Group



Complete the following fields

- Branch/Plant
- Location Dimension Group
- Item Dimension Group
- Unit of Measure
- Container Code
- Maximum Capacity



# **Set Up Fixed Locations and Zones**

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## **Setting Up 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.

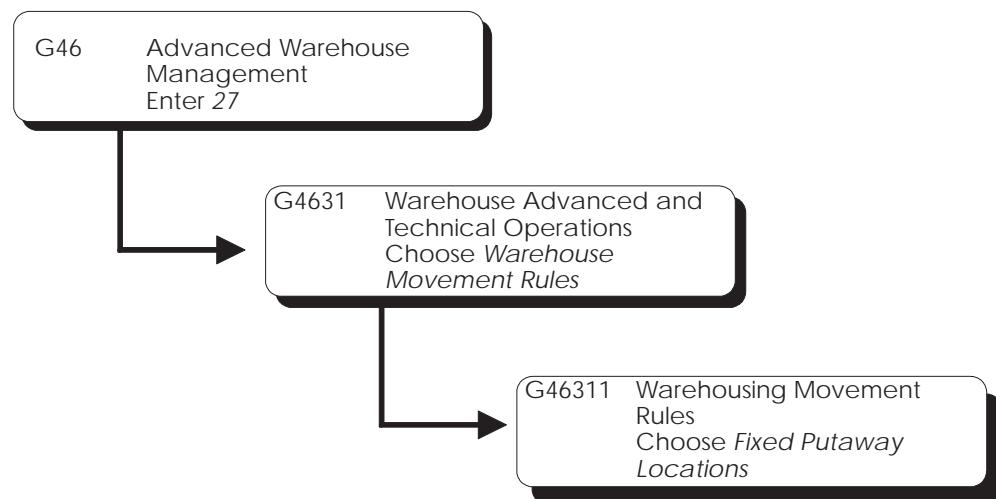
Setting up fixed locations and zones includes:

- Setting up fixed putaway locations
- Setting up fixed picking locations
- Setting up fixed replenishment zones

### **Before You Begin**

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

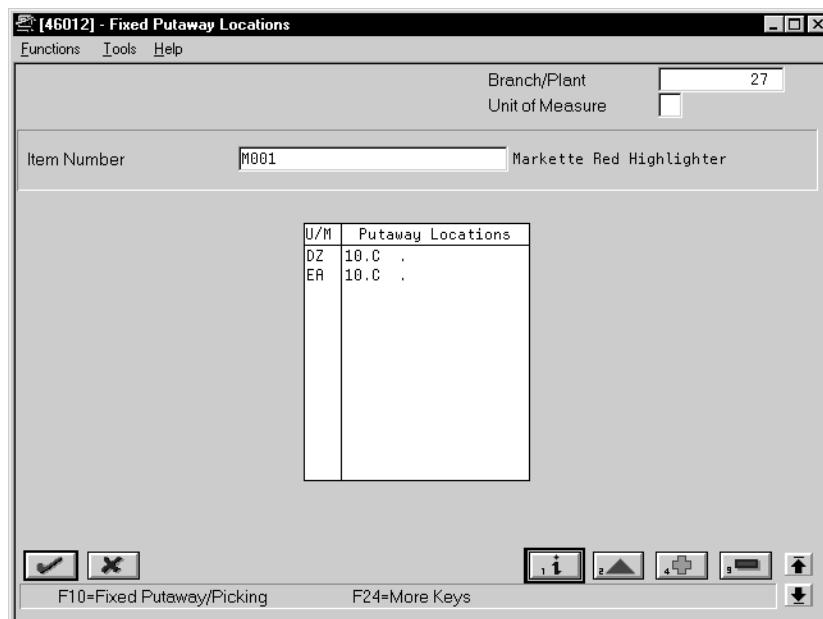
## Setting Up Fixed Putaway Locations



You set up fixed putaway locations to use the same locations consistently for storage of a given item. This 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.

### ► To set up fixed putaway locations

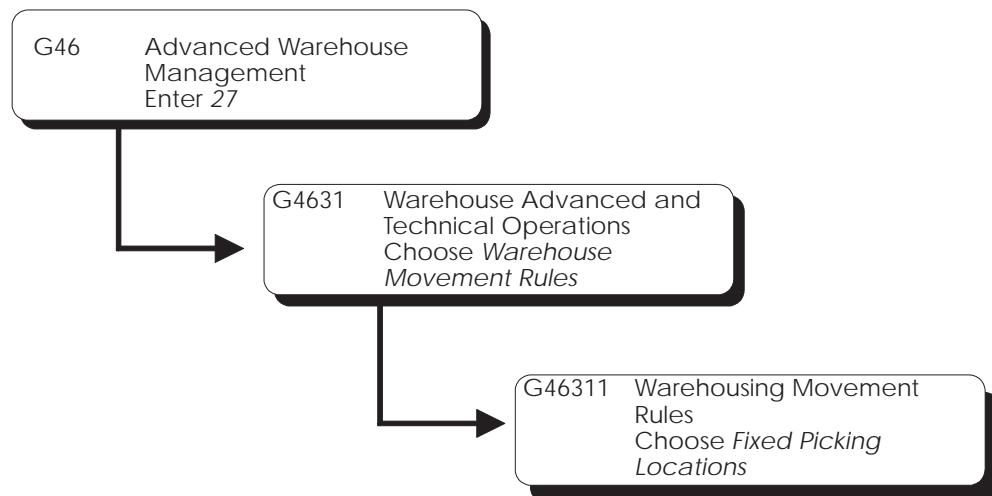
On Fixed Putaway Locations



Complete the following fields:

- Branch/Plant
- Item Number
- Unit of Measure
- Putaway Locations

## Setting Up Fixed Picking Locations

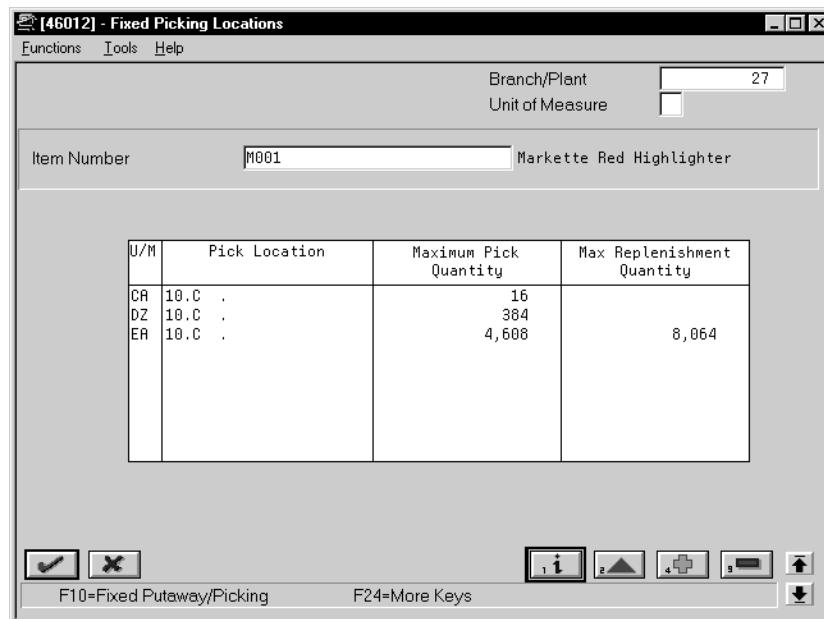


You set up fixed picking locations to use the same locations consistently for picking of a given item. This allows you to segregate picking locations from other locations or to keep certain items' picking locations near their putaway and replenishment locations. Often, your fixed picking locations are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

### ► **To set up fixed picking locations**

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On Fixed Picking Locations



1. Complete the following fields:
  - Branch/Plant
  - Item Number
  - Unit of Measure
  - Pick Location
  - Maximum Pick Quantity
  - Maximum Replenishment Quantity
2. Access the fold area.
3. Complete the following fields:
  - Normal Replenishment Point
  - Minimum Replenishment Point

Field	Explanation
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.

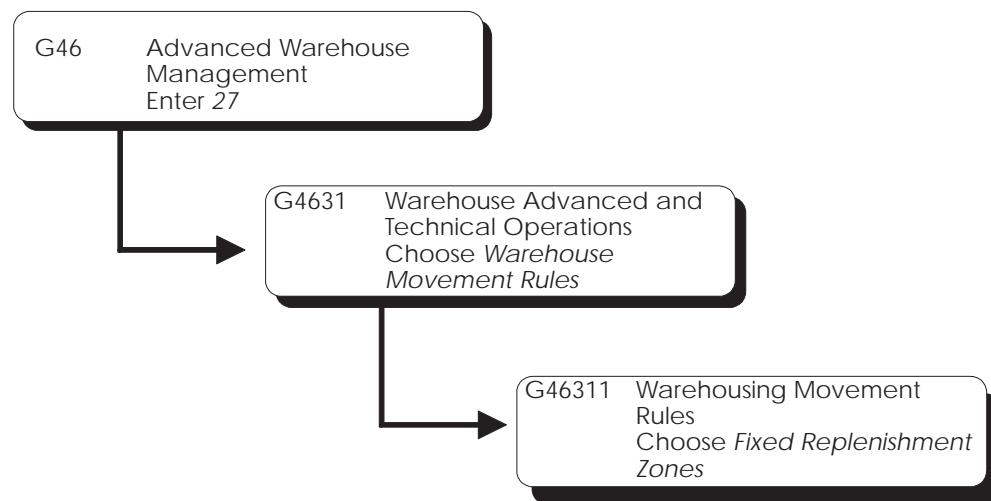
Field	Explanation
Quantity – Maximum Replenishment	The number you enter here specifies the maximum quantity to be replenished to a fixed picking location. You must enter a quantity in this field if you will be doing economic replenishment. You specify in the processing options for the Location Selection 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.
Quantity – 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.
Quantity – Minimum 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.

## What You Should Know About

### Setting replenishment quantities

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. The system will print movement documents to replenish a greater quantity than the picking location can hold, and you might not be able to store all of the items in the picking location.

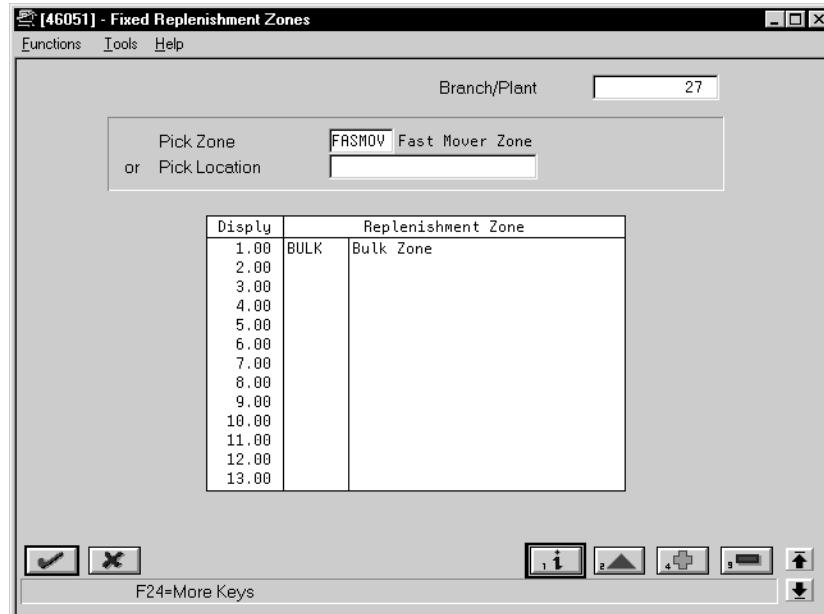
## Setting Up Fixed Replenishment Zones



You set up fixed replenishment zones to tie replenishment locations to picking locations. These replenishment locations then refill the same picking locations consistently. This allows you to segregate replenishment zones from other locations, or to keep certain items' replenishment locations near their picking locations.

### ► To set up fixed replenishment zones

On Fixed Replenishment Zones



Complete the following fields:

- Branch/Plant
- Pick Zone
- Pick Location
- Replenishment Zone

Field	Explanation
Picking Zone	<p>A code (system 46/type ZN) that identifies an area from which items are picked for shipment.</p> <p>..... <i>Form-specific information</i> .....</p> <p>Enter a pick location code if you want to define the list of zones for a specific zone. If you define fixed replenishment zones for both a specific-location and a pick zone, the location-specific table overrides the location zone table.</p> <p>You can replenish a single pick zone from multiple replenishment zones.</p>
Replenishment Zone	<p>A code (system 46/type ZN) that identifies the areas in the warehouse from which items are retrieved to replenish or refill picking locations.</p> <p>..... <i>Form-specific information</i> .....</p> <p>Type a replenishment zone code in this field for each zone you want in the list. The system does not use the sequence field to search for locations.</p>

## What You Should Know About

<b>Defining replenishment zones by picking location versus picking zone</b>	During replenishment of a picking location, the system searches for a replenishment zone attached to the picking location. If you have not set up a replenishment zone for the picking location, the system searches for a replenishment zone attached to a picking zone. If you have not set up a picking zone, the system displays an error.
<b>Restricting replenishment zones</b>	You can limit replenishment of a picking location to a single replenishment zone by entering that zone in the location's replenishment instruction.



# Set Up Item Warehouse Information

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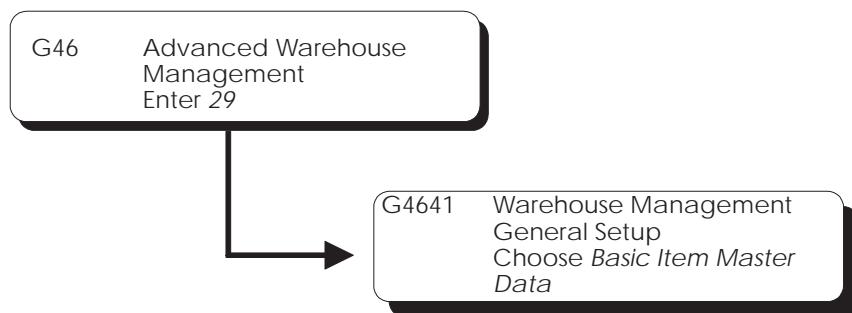
## Setting Up Item Warehouse Information

You must provide warehouse information about each item before the system can process items. For example, you can classify items by their size or by the amount of demand for the items. 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.

Setting up item warehouse information includes:

- Defining unit of measure structures
- Defining item classification codes
- Setting up item unit of measure definitions
- Setting up item profiles

## Defining Unit of Measure Structures



You must define a unit of measure structure to process an item in the Advanced 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. Conversely, if you lack small locations, you can convert eaches to pallets, to store the items efficiently in larger locations. The system uses the unit of measure structure to choose the most efficient unit of measure for picking, putaway, and replenishment.

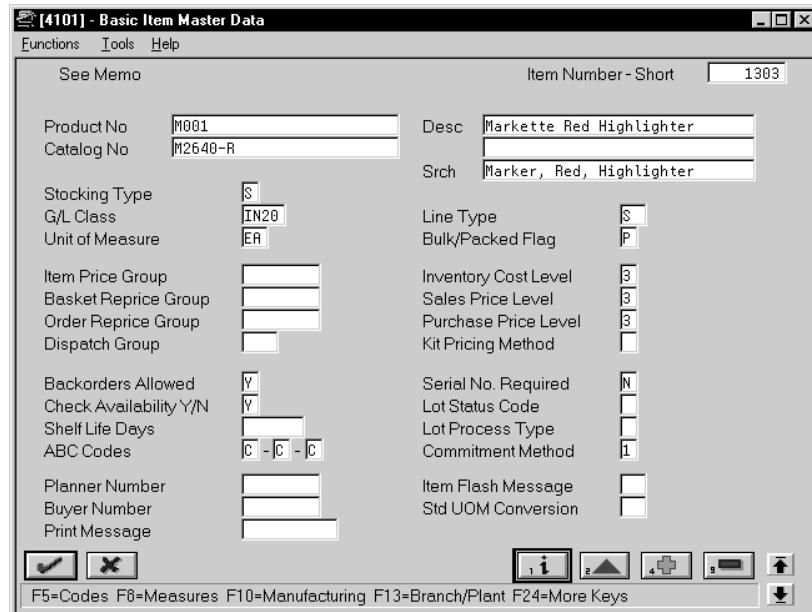
You can define an unlimited number of unit of measure conversions for an item. For example, you can define conversions such as 24 items per case, 16 cases per pallet, and so on. However, the system limits the unit of measure structure to 5 units of measure. You assign a code (1 through 5) to each unit of measure in the structure. Each item must have a primary unit of measure, which 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 assigns the largest numerical structure code (up to the number 5) to the primary (smallest) unit of measure automatically.

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. If you do not set the unit of measure conversion, the system searches for the item's conversion in the Item Master table.

### ► To define unit of measure structures

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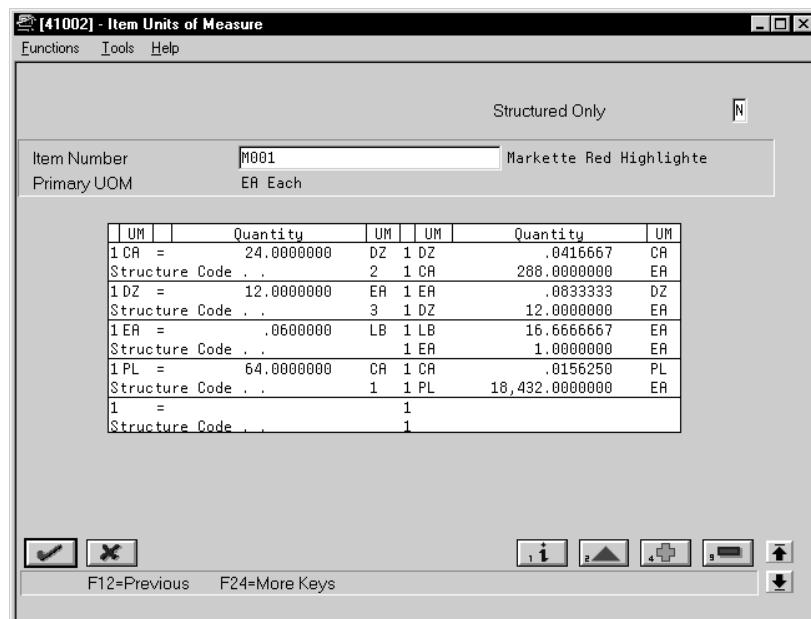
On Basic Item Master Data



1. Locate the item for which you want to define a unit of measure structure.
2. Access Default Units of Measure.



3. On Default Units of Measure, access Item Units of Measure.



4. On Item Units of Measure, complete the following fields:

- Item Number
- Unit of Measure
- Quantity
- Unit of Measure

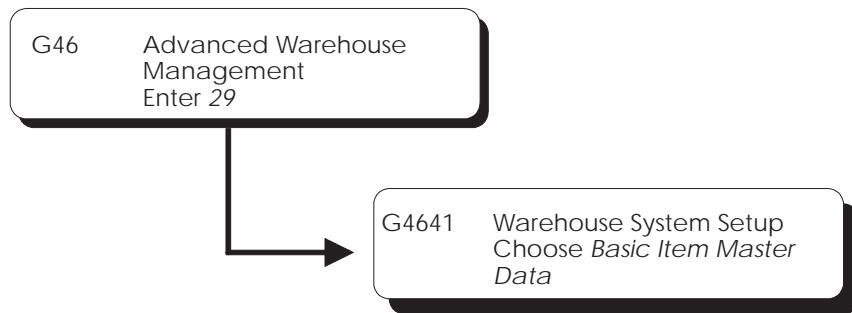
5. Access the fold area.

6. Complete the following field for up to five levels in the structure:

- Structure Code

Field	Explanation
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
UM	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. ..... <i>Form-specific information</i> .....
	This unit of measure to which you are converting.
Quantity	The factor that the system uses to convert one unit of measure to another unit of measure. ..... <i>Form-specific information</i> .....
	The quantity and the unit of measure from which you are converting equal the unit of measure to which you are converting.
Unit of Measure Structure	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.

## Defining 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.

### ► **To define item classification codes**

On Basic Item Master Data

[4101] - Basic Item Master Data		Item Number - Short	
Functions Tools Help		14138	
Product No	CD	Desc	Compact Disk-Various Artists
Catalog No	CD	Srch	Compact Disk-Various Artists
Stocking Type	S	Line Type	S
G/L Class	IN20	Bulk/Packed Flag	P
Unit of Measure	EA	Inventory Cost Level	3
Item Price Group		Sales Price Level	3
Basket Reprice Group		Purchase Price Level	3
Order Reprice Group		Kit Pricing Method	
Dispatch Group		Serial No. Required	N
Backorders Allowed	Y	Lot Status Code	
Check Availability Y/N	Y	Lot Process Type	
Shelf Life Days		Commitment Method	1
ABC Codes	1 - 2 - 3	Item Flash Message	
Planner Number		Std UOM Conversion	
Buyer Number			
Print Message			
<input checked="" type="checkbox"/> <input type="checkbox"/>			
F5=Codes F8=Measures F10=Manufacturing F13=Branch/Plant F24=More Keys			

1. Locate the item.
2. Access Classification Codes.

Product No		CD	Compact Disk-Various Artists
Sales		Other Codes	
Sales Catalog Section	<input type="checkbox"/>	Shipping Conditions Code	<input type="checkbox"/>
Sub Section	<input type="checkbox"/>	Shipping Commodity Class	<input type="checkbox"/>
Sales Category Code 3	<input type="checkbox"/>	Cycle Count Category	<input type="checkbox"/>
Sales Category Code 4	<input type="checkbox"/>	Item Dimension Group	<input type="checkbox"/> DISK
Sales Category Code 5	<input type="checkbox"/>	Warehouse Process Grp 1	<input type="checkbox"/> FAST
Preferred Carrier	<input type="checkbox"/>	Warehouse Process Grp 2	<input type="checkbox"/>
Purchasing		Warehouse Process Grp 3	<input type="checkbox"/>
Commodity Class	<input type="checkbox"/>	Item Pool Code	<input type="checkbox"/>
Commodity Sub Class	<input type="checkbox"/>	Category Code 6	<input type="checkbox"/>
Supplier Rebate Code	<input type="checkbox"/>	Category Code 7	<input type="checkbox"/>
Master Planning Family	<input type="checkbox"/>	Category Code 8	<input type="checkbox"/>
Landed Cost Rule	<input type="checkbox"/>	Category Code 9	<input type="checkbox"/>
Preferred Carrier	<input type="checkbox"/>	Category Code 10	<input type="checkbox"/>

3. On Classification Codes, complete the following optional field:
  - Item Dimension Group
4. To define warehouse process groups for the item, complete the following fields:
  - Warehouse Process Group 1

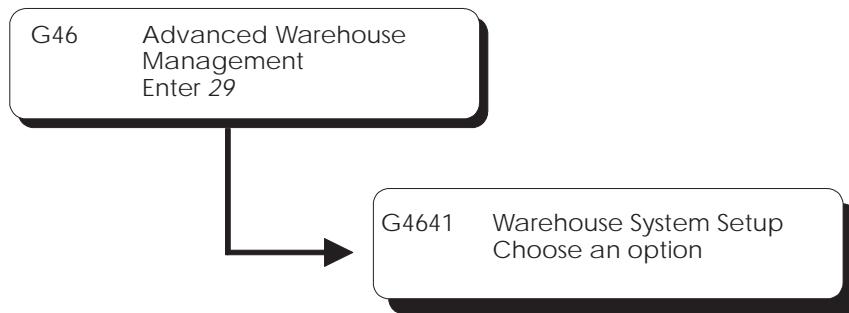
- Warehouse Process Group 2
- Warehouse Process Group 3

Field	Explanation
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).
Process Group 1	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).
Process Group 2	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).
Process Group 3	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).

## See Also

- *Defining Process Selection* for information about how warehouse process groups control which movement instructions the system uses

### Setting Up Item Unit of Measure Definitions



You define information about each item's units of measure, such as eaches, boxes, cases, and so on, 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:

- 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 using Item Units of Measure during the creation of the Basic Item Master Data 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 Unit of Measure Definition to define the unit of measure's dimensions and how the system processes the unit of measure. You can:

- Define units of measure by item
- Define units of measure by group

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

#### ► **To define units of measure by item**

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On Unit of Measure Definition by Item

**[46011] - U/M Definition by Item**

Functions Tools Help

Branch/Plant	27		
Item Number	S001 Front Loading Stapler		
Unit of Measure	EA Each		
Process Rules			
License Plate (Y/N)	<input checked="" type="checkbox"/>	Capacity Method	<input checked="" type="checkbox"/>
Breakdown (Y/N)	<input checked="" type="checkbox"/>	Allow Rotation (Y/N)	<input checked="" type="checkbox"/>
Rollup (Y/N)	<input checked="" type="checkbox"/>	U/M Usage	<input checked="" type="checkbox"/>
Rerepack (Y/N)	<input checked="" type="checkbox"/>	Carton Rcmd Method	<input checked="" type="checkbox"/>
Default Pack Code	<input type="checkbox"/>	Putaway Tag Method	<input checked="" type="checkbox"/>
Default Container	<input type="checkbox"/>	Picking Tag Method	<input checked="" type="checkbox"/>
		Replen. Tag Method	<input checked="" type="checkbox"/>
Capacity Requirements			
Gross Dimensions	Width 2.00	Depth 8.00	Height 3.00
Gross Cubes	UM 48.00 CI		
Gross Weight	.75	LB	
Stacking Limit	<input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
F5=Item Dim Group/Item    F24=More Keys			

1. Complete the following fields:

- Branch/Plant
- Item Number
- Unit of Measure
- Capacity Method
- Allow Rotation
- Unit of Measure Usage

2. If you measure volume using one of the two capacity methods, complete the following fields:

- Gross Width
- Gross Depth
- Gross Height
- Gross Weight

3. Complete the following optional fields:

- Carton Recommendation Method
- Default Pack Code
- Default Container

Field	Explanation
Capacity Method	<p>A code that indicates the capacity method the system uses to calculate whether the quantity to be put away will fit in a location.</p> <p>Valid methods are:</p> <ul style="list-style-type: none"> <li>1 Volume checking. The system compares the available cubic dimensions of a location to the cubic dimensions of the item to be put away.</li> <li>2 Layering. The system compares the item's dimensions to the usable dimensions of the location. This method lets you layer goods in a location. If you specify this capacity method, you must also specify whether the item can be rotated. If there is enough available volume, and the item's dimensions fit in the location, the system suggests the location for putaway.</li> <li>3 Quantity checking. The system examines the quantity of the item that should fit in the location, as you defined it through Location Capacity Definition (P46024).</li> </ul>
Allow Rotation (Y/N)	<p>A code that indicates whether you allow the system to rotate an item 90 degrees to determine whether the item fits into a location.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>Y Yes, rotate the item 90 degrees during putaway</li> <li>N No, do not rotate the item 90 degrees during putaway</li> </ul> <p>NOTE: You must enter a code in this field if you use capacity method 2 (layering).</p>

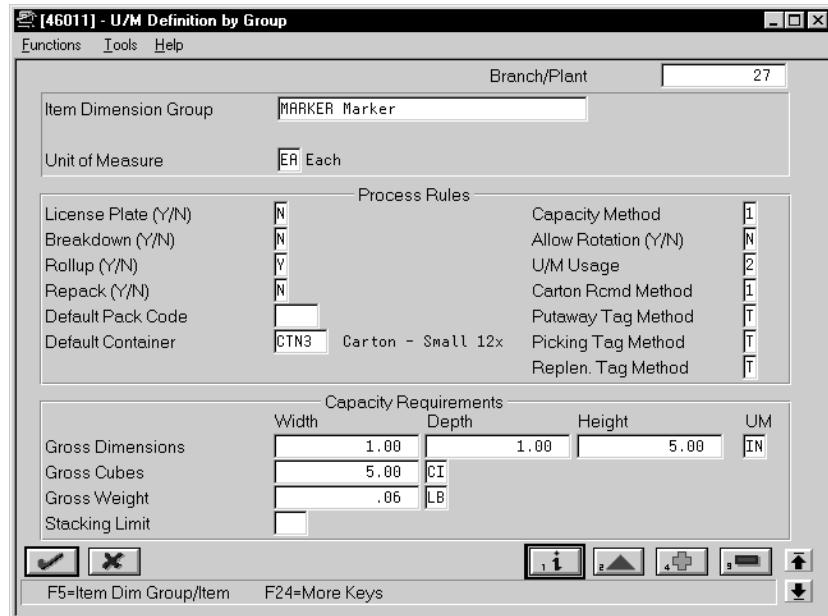
Field	Explanation
U/M Usage	<p>A code that indicates whether the default storage container assigned to the specified item in this unit of measure is an open, pallet-type container or a closed, box-type container. The system calculates the item's volume and weight based on container type.</p>
	<p>Valid codes are:</p>
	<p>1      The container is an open, pallet-type container. The system calculates its volume and weight as follows:</p> <p>Height = the height of the container plus the height of the items on the container</p> <p>Weight = the weight of the container plus the weight of the items on the container</p> <p>Width = the larger of the width of the container or the items on the container</p> <p>Depth = the larger of the depth of the container or the items on the container</p> <p>2      The container is a closed, box-type container. The system calculates its volume and weight as follows:</p> <p>Weight = The weight of the container plus the weight of the goods in the container</p> <p>Height, width, and depth are pulled from Container and Carton Code (P46091) information, where you also define the container's weight.</p>
	<p>NOTE: If you do not specify a default container for the specified item in this unit of measure, the system uses the height, width, depth, and weight the you define on this form.</p>
Gross Width	<p>The gross width of the location(s) defined within the location dimension group, the gross width of an item as defined in the Unit Of Measure Definition (by item or group), or the gross width of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).</p>
Gross Depth	<p>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 is defined in Branch/Plant Constants – Page 2 (P410012).</p>
Gross Height	<p>The gross height of the location(s) defined within the location dimension group, the gross height of an item as defined in the Unit Of Measure Definition (by item or group), or the gross height of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).</p>

Field	Explanation
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.
Carton Recommendation Method	<p>A code that indicates the method the system uses to recommend a carton for the specified item in this unit of measure.</p> <p>Valid codes are:</p>
	<p>blank Do not recommend cartons for the specified item in this unit of measure</p> <p>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</p> <p>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</p>
	<p>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).</p>
Packing Code	<p>A code (system 46/type PK) that identifies the packing materials to use (such as opaque shrink wrap, or foam nuggets) if repacking is required before putaway. If you set the Repack (Y/N) field to Y, you must enter a code in this field. You define the packing codes on User Defined Code Revisions.</p>
Default Container	<p>A code (system 46/type 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 Container and Carton Codes (P46091) to define storage containers.</p>

### ► To define units of measure by group

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On Unit of Measure Definition by Group



1. Complete the following fields:

- Branch/Plant
- Item Dimension Group
- Unit of Measure
- Capacity Method
- Allow Rotation
- Unit of Measure Usage

2. If you measure volume by the capacity method, complete the following fields:

- Gross Width
- Gross Depth
- Gross Height
- Gross Weight

3. Complete the following optional fields:

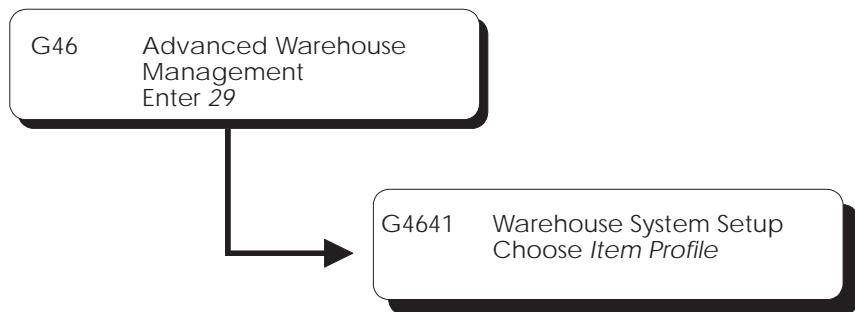
- Carton Recommendation Method
- Default Pack Code
- Default Container

Field	Explanation
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).

### What You Should Know About

<b>Unit of measure hierarchy</b>	If you set up an item unit of measure definition, it always overrides an item group unit of measure definition. This is because 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 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.
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### Setting Up 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 confirmation 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 R/ / as its default receiving location

## ► To set up item profiles

On Item Profile



1. Complete the following fields:

- Branch/Plant
- Item Number
- Mix Items
- Mix Dates/Lots
- Split Lines
- 1 or 2 Phase Putaway
- 1 or 2 Phase Picking
- 1 or 2 Phase Replenishment
- Overflow Location
- Variance Location
- Holding Location
- Base Putaway Location
- Base Picking Location

2. Complete the following optional field:

- Default Tax Code

Field	Explanation
Mix Items	<p>A code that indicates whether you want the system to store different items in the same location.</p> <p>Valid codes are:</p> <p>Y Yes, allow different items to be stored in the same location</p> <p>N No, do not allow different items to be stored in the same location</p>
Mix Dates / Lots	<p>A code that indicates whether you want the system to store items with different receipt dates or different lots in the same location.</p> <p>Valid codes are:</p> <p>Y Yes, store items with different receipt dates or lots in the same location</p> <p>N No, do not store items with different receipt dates or lots in the same location</p> <p>You must set up the location profile and the item profile to allow mixing of dates and lots.</p>
Split Lines	<p>A code that indicates whether the system can split a purchase order line when you create a putaway suggestion for the order line.</p> <p>Valid codes are:</p> <p>Y Yes, split purchase order lines when making putaway suggestions</p> <p>N No, do not split purchase order lines when making putaway suggestions</p>

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Field	Explanation
1 or 2 Phase Putaway	<p>A code that indicates whether you use 1- or 2-phase confirmation during putaway.</p> <ul style="list-style-type: none"> <li>• 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.</li> <li>• 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.</li> </ul>

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

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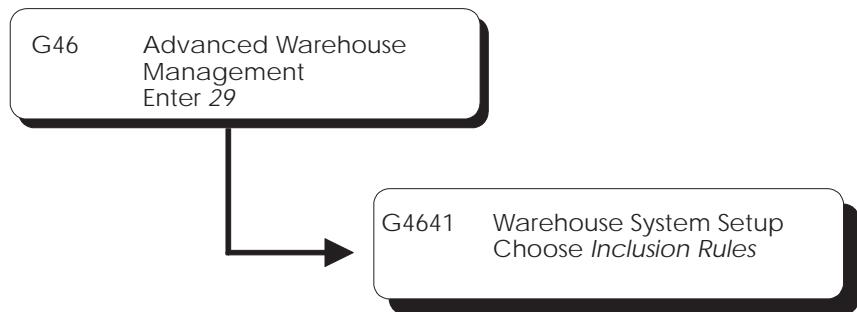
Field	Explanation						
1 or 2 Phase Picking	<p>A code that indicates whether you use 1- or 2-phase confirmation during picking.</p> <ul style="list-style-type: none"> <li>• 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.</li> <li>• 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.</li> </ul> <p>If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.</p> <ul style="list-style-type: none"> <li>• Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.</li> <li>• 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.</li> </ul> <p>Valid codes are:</p> <table> <tr> <td>I</td> <td>Use 1-phase confirmation</td> </tr> <tr> <td>L</td> <td>Use logical 2-phase confirmation</td> </tr> <tr> <td>P</td> <td>Use physical 2-phase confirmation</td> </tr> </table>	I	Use 1-phase confirmation	L	Use logical 2-phase confirmation	P	Use physical 2-phase confirmation
I	Use 1-phase confirmation						
L	Use logical 2-phase confirmation						
P	Use physical 2-phase confirmation						

Field	Explanation						
1 or 2 Phase Replenishment	<p>A code that indicates whether you use 1- or 2-phase confirmation during replenishment.</p> <ul style="list-style-type: none"> <li>• 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.</li> <li>• 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.</li> </ul>						
	<p>If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.</p> <ul style="list-style-type: none"> <li>• Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.</li> <li>• 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.</li> </ul>						
	<p>Valid codes are:</p> <table> <tr> <td>I</td><td>Use 1-phase confirmation</td></tr> <tr> <td>L</td><td>Use logical 2-phase confirmation</td></tr> <tr> <td>P</td><td>Use physical 2-phase confirmation</td></tr> </table>	I	Use 1-phase confirmation	L	Use logical 2-phase confirmation	P	Use physical 2-phase confirmation
I	Use 1-phase confirmation						
L	Use logical 2-phase confirmation						
P	Use physical 2-phase confirmation						
Overflow Location	<p>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).</p>						
Variance Location	<p>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.</p>						
Holding Location	<p>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.</p>						

Field	Explanation
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).
Default 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).

## Set Up Inclusion Rules

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### Setting Up Inclusion Rules

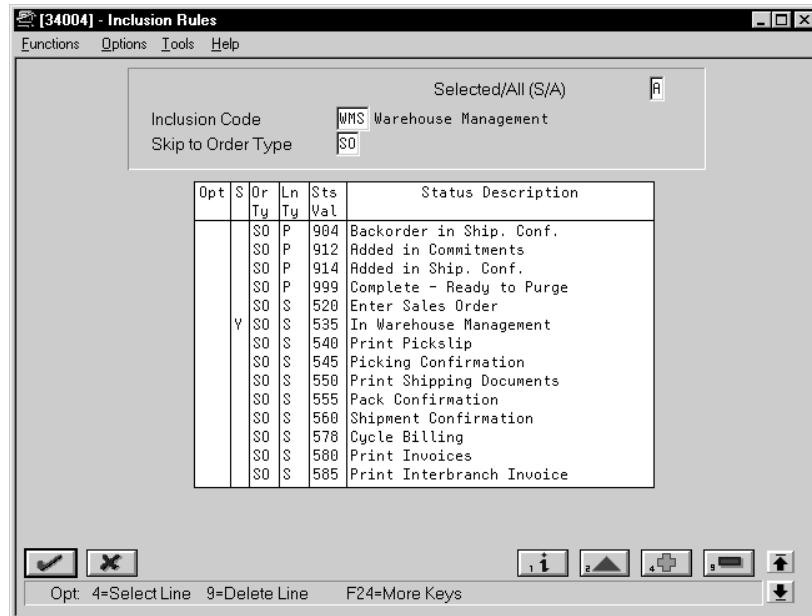
An inclusion rule specifies which order type, line type, and status combinations that you process through your warehouse. This determines the steps at which the system creates putaway requests (during purchase order receipts entry) or picking requests (during sales order entry).

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.

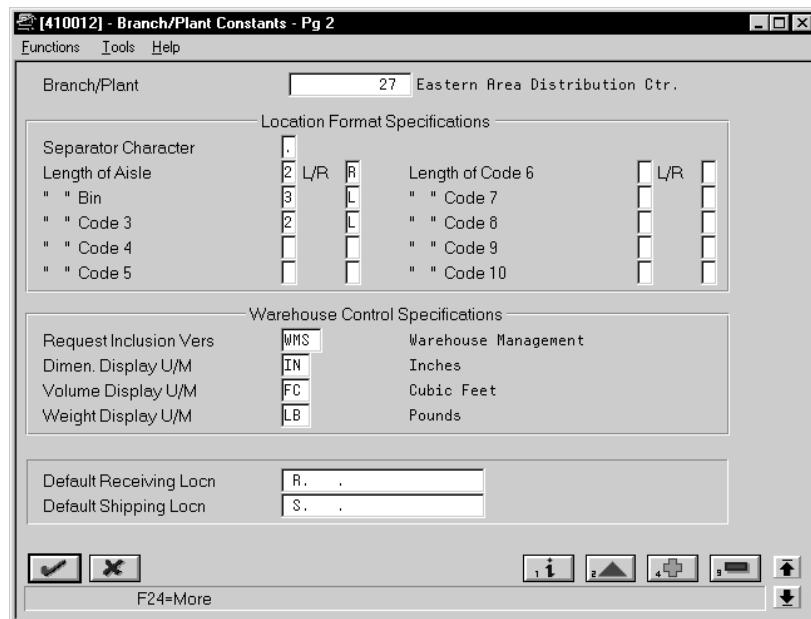
#### ► **To set up inclusion rules**

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On Inclusion Rules



1. Locate the inclusion rule for Warehouse Management by completing the following field:
  - Inclusion Code
2. To limit the information that displays, complete the following field:
  - Skip to Order Type
3. To add or delete an order type, complete the following field and press Enter:
  - Option
4. Exit Inclusion Rules.
5. Access the Warehouse System Setup menu.
6. From the Warehouse System Setup menu, choose *Branch/Plant Constants*.
7. Access Branch/Plant Constants – Pg 2.



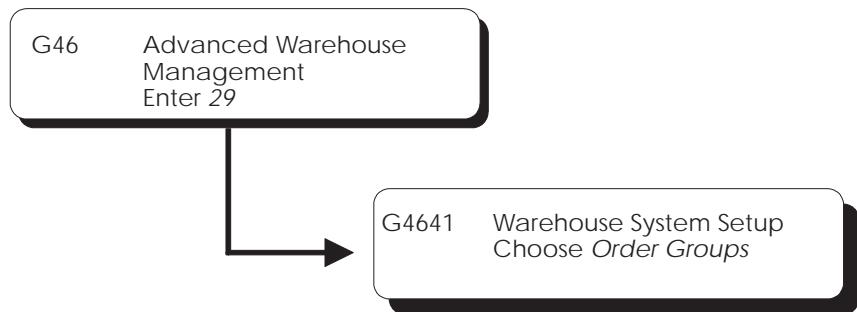
8. On Branch/Plant Constants – Pg 2, complete the following field:

- Request Inclusion Version

Field	Explanation
Selection Code	A code used to select All or a Selected part of a list of items.
Inclusion Code	<p>A user defined code (system 40/type RV) that identifies an inclusion rule that you want the system to use for this branch/plant. The Manufacturing and Advanced Warehouse Management systems use inclusion rules as follows:</p> <ul style="list-style-type: none"> <li>• For Manufacturing Allows multiple versions of resource rules for running MPS, MRP, or DRP.</li> <li>• For Advanced 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.</li> </ul>
Order Type	<p>A code (system 00/type DT) that identifies the type of document, such as an order or an invoice.</p> <p>..... <i>Form-specific information</i> .....</p> <p>If you are using the Skip to Order Type field, you can enter an order type code and press Enter to display only rules about that order type. To see the whole set of order types included in the resource rules, leave this field blank and use the Roll keys.</p>

Field	Explanation
Selection Exits	Selection exit codes are options and function keys that are used to perform a specific function for a selected line or form of data. The most commonly used selection exits for each program are displayed in highlighted text at the bottom of the form. To display all available selection exits, press F24. Press F1 in the Option field to display all available Options for the program.
Request Inclusion Version	A user defined code (system 40/type RV) that identifies an inclusion rule that you want the system to use for this branch/plant. The Manufacturing and Advanced Warehouse Management systems use inclusion rules as follows: <ul style="list-style-type: none"><li>• For Manufacturing Allows multiple versions of resource rules for running MPS, MRP, or DRP.</li><li>• For Advanced 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.</li></ul>

## Set Up Order Groups



### Setting Up Order Groups

An order group is a set of document types, such as purchase orders or sales orders, that you use as a group 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 must assign each order type that you use to an order group. You can assign an order type to only one order group.

Additionally, you must set up order groups if you want to perform online replenishment.



#### **To set up order groups**

On Order Groups



Complete the following fields:

- Branch/Plant
- Order Group
- Include Order Types

Field	Explanation
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.

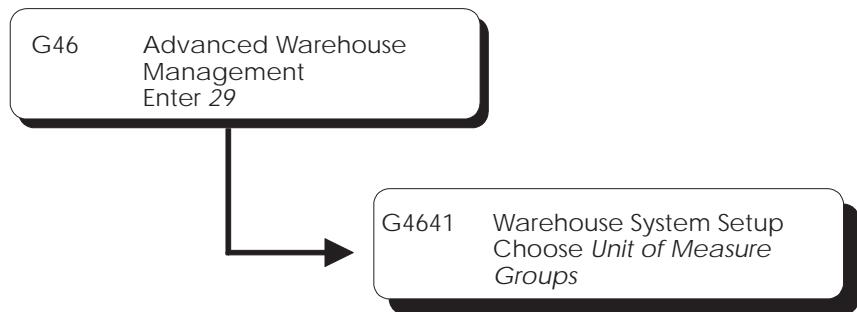
Field	Explanation												
Include Order Types	<p>A user defined code (system 00/type DT) that identifies the type of document. This code also indicates the origin of the transaction. J.D. Edwards has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)</p> <p>The following document types are defined by J.D. Edwards and should not be changed:</p> <table> <tbody> <tr><td>P</td><td>Accounts Payable Documents</td></tr> <tr><td>R</td><td>Accounts Receivable Documents</td></tr> <tr><td>T</td><td>Payroll Documents</td></tr> <tr><td>I</td><td>Inventory Documents</td></tr> <tr><td>O</td><td>Order Processing Documents</td></tr> <tr><td>J</td><td>General Accounting/Joint Interest Billing Documents</td></tr> </tbody> </table>	P	Accounts Payable Documents	R	Accounts Receivable Documents	T	Payroll Documents	I	Inventory Documents	O	Order Processing Documents	J	General Accounting/Joint Interest Billing Documents
P	Accounts Payable Documents												
R	Accounts Receivable Documents												
T	Payroll Documents												
I	Inventory Documents												
O	Order Processing Documents												
J	General Accounting/Joint Interest Billing Documents												

## What You Should Know About

<b>Naming order groups</b>	You can use a blank for the name of your most commonly used order group. As a result, the system displays your order group automatically when you access Order Groups.
<b>Mandatory document types</b>	You must assign document type IQ (Inventory Quantity) to each order group that you use. The system uses document type IQ for replenishment.



## Set Up Unit of Measure Groups



### Setting Up Unit of Measure Groups

A unit of measure group is a set of items in the same unit of measure that you want the system to process the same way. For example, if you have one thousand different items that you normally count in eaches, you can assign the items to the EACHES unit of measure group, so you do not have to individually define each item's unit of measure. This 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.

#### ► **To set up unit of measure groups**

On Unit of Measure Groups

**[46096] - Unit of Measure Groups**

Functions Tools Help

Branch/Plant	40
U/M Group	WA

U/M	Unit of Measure Group
BT	WA Water Group
PL	WA Water Group
SX	WA Water Group
TW	WA Water Group

F3=Exit F24=More Keys
 
 1  2  3  4  5  6  7  8

Complete the following fields:

- Branch/Plant
- Unit Of Measure
- Unit of Measure Group

Field	Explanation
Unit of Measure Group	<p>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.</p> <p>You use unit of measure groups to set up movement instructions for putaway, picking, or replenishment.</p> <p>..... <i>Form-specific information</i> .....</p> <p>Use the UOM Group field in the upper right portion of the form to enter the code for a specific group if you want to display only units of measure for that group.</p> <p>Use the UOM Group field in the lower portion of the form to identify the unit of measure group to which each unit of measure is assigned.</p>
Unit of Measure	<p>A user defined code (system 00/ type UM) that indicates in what quantity an inventory item is expressed; for example, CS (case) or BX (box).</p>

# Set Up Storage Containers

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## Setting Up 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 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.

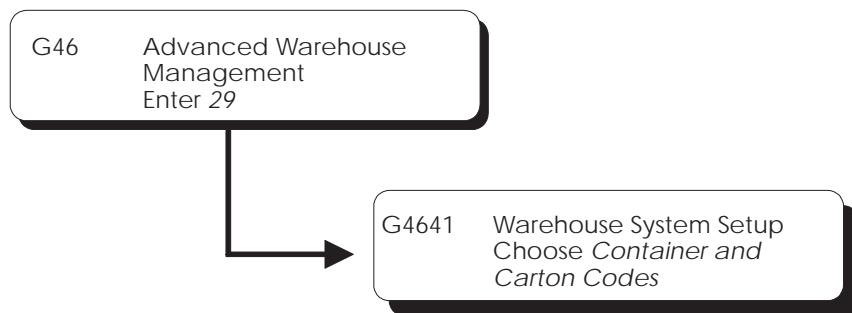
Two types of storage containers are available:

- Open, or pallet-type containers, which you can overfill to exceed the container's dimensions
- Closed, or box-type containers, which you cannot overfill

To set up storage containers, complete the following tasks:

- Define storage containers
- Set up allowed containers for each location

## Defining Storage Containers



You define the dimensions, weight, and capacity of each container that you want to use in your warehouse. The system uses this information to choose locations for putaway.

## ► To define storage containers

On Container and Carton Codes

Code	Description	Dimensions			UM
		Width	Depth	Height	
PAL1	Pallet Type #1 36x48	36.00	48.00	6.00	IN
Ship Priority	Shipping (Y/N) .	N	Cubes . . . .	10,368.00	CI
Available (Y/N).		Y	Weight. . . .	25.00	LB
Tolerance . . . .				85.00	90.00
PAL2	Pallet Type #2 48x48	48.00	48.00	6.00	IN
Ship Priority	Shipping (Y/N) .	N	Cubes . . . .	13,824.00	CI
Available (Y/N).		Y	Weight. . . .	40.00	LB
Tolerance . . . .				85.00	90.00
Ship Priority	Shipping (Y/N) .		Cubes . . . .		
Available (Y/N).			Weight. . . .		
Tolerance . . . .					

1. Complete the following fields:

- Branch/Plant
- Shipping Container
- Container Code
- Width
- Depth
- Height
- Unit of Measure

2. Access the fold area.

3. Complete the following fields:

- Shipping Container
- Cubes
- Unit Of Measure
- Available
- Weight
- Unit Of Measure
- Beginning Tolerance

- Ending Tolerance

Field	Explanation
Shipping	<p>A code that indicates whether the container can be used as a shipping carton. The system uses only items that can be used as shipping cartons when it makes carton recommendations.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>Y Yes, use this container as a shipping carton</li> <li>N No, do not use this container as a shipping carton</li> </ul>
	<p>..... <i>Form-specific information</i> .....</p> <ul style="list-style-type: none"> <li>• Enter Y in the Shipping Y/N field in the upper-right corner to specify that you want to review only containers that can be shipped. Blank displays all containers, both shippable and non-shippable.</li> <li>• The Shipping Y/N field in the fold allows you to define whether the container is shippable. A Y in this field indicates that the system will consider this container when making carton recommendations.</li> </ul>
Container Code	<p>A code (system 46/type 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 Container and Carton Codes (P46091) to define storage containers.</p>
	<p>..... <i>Form-specific information</i> .....</p> <ul style="list-style-type: none"> <li>• Skip to Code field: Enter a container code in this field if you want to display a specific code at the top of the list.</li> <li>• Code field: The code in this field identifies the container whose dimensions display on the line.</li> </ul>
Gross Width	<p>The gross width of the location(s) defined within the location dimension group, the gross width of an item as defined in the Unit Of Measure Definition (by item or group), or the gross width of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).</p>
Gross Depth	<p>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 is defined in Branch/Plant Constants – Page 2 (P410012).</p>

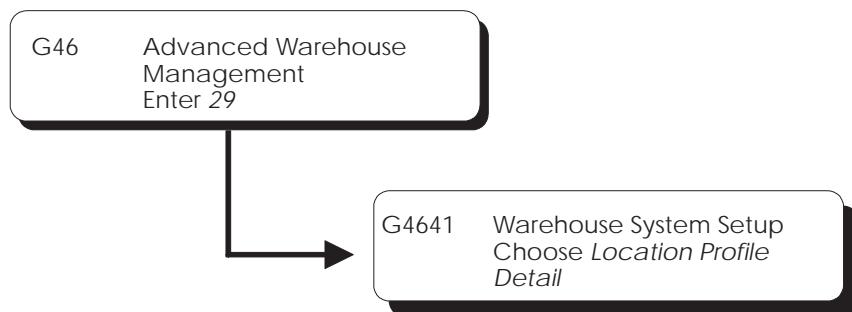
Field	Explanation
Gross Height	The gross height of the location(s) defined within the location dimension group, the gross height of an item as defined in the Unit Of Measure Definition (by item or group), or the gross height of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).
U/M	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.
Gross Cubic Dimensions	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).
..... <i>Form-specific information</i> .....	
The system calculates the cubic dimension of the container after you enter the container's dimensions (height multiplied by depth multiplied by width).	
Available Container	A code that indicates whether this container is available as a shipping carton for packing picked items. The system uses available containers during carton recommendation.
Valid codes are:	
Y Yes, this container is available as a shipping carton	
N No, this container is not available as a shipping carton	
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.
Minimum Fill Percentage	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%.
Ending Tolerance	The maximum percentage of a shipping carton that can be filled before the system recommends a larger carton. The default maximum percentage is 90%.

## What You Should Know About

### Predefined container codes

If the predefined container codes do not meet your needs, add a new container definition on User Defined Code Revisions.

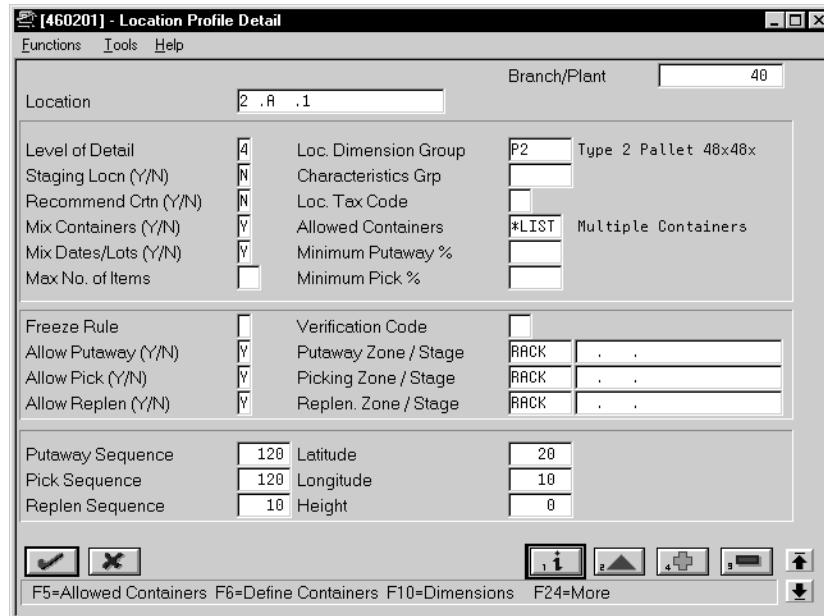
## Setting Up Allowed Containers for Each Location



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

### ► To set up allowed containers for each location

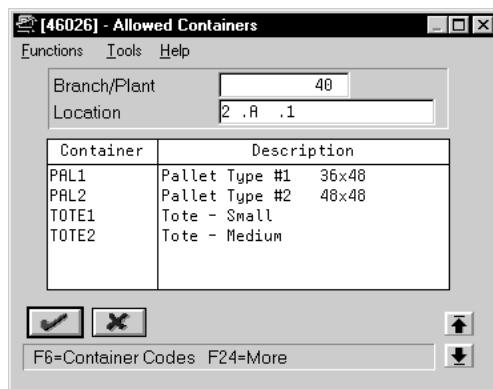
On Location Profile Detail



1. Locate the location for which you want to set up allowed containers.
2. Complete the following field:
  - Allowed Containers

If you enter \*LIST in Allowed Containers, you can define a list of containers.

3. To define a list of containers, access Allowed Containers.



4. On Allowed Containers, complete the following field for each container that you want to include in the list:
  - Container

Field	Explanation
Allowed Containers	<p>A code (system 46/type 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 Container and Carton Codes (P46091) to define storage containers.</p> <p>..... <i>Form-specific information</i> .....</p> <p>Leave this field blank to indicate all containers, enter a specific code to indicate a specific container, or enter *LIST to have the system examine a list on Allowed Containers (P46026).</p>

## What You Should Know About

**Pallets (open containers) versus boxes (closed containers)**

To calculate the space required for a storage container, you must define whether the container is pallet-type (open) or box-type (closed).



# Set Up Shipping Cartons and Recommendation

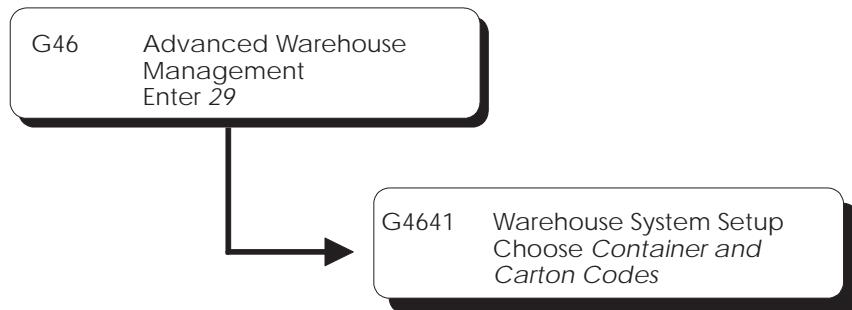
## Setting Up Shipping Cartons and Recommendation

You use shipping cartons, such as boxes and cases, to ship items out of your warehouse. A shipping carton can be identical to a storage container, except that you can ship only closed, box-type cartons. You can have the system recommend a shipping carton when you pick an item.

Setting up shipping cartons and carton recommendation includes:

- Setting up shipping cartons
- Setting up carton recommendation

## Setting Up 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.

### ► **To set up shipping cartons**

On Container and Carton Codes

**[46091] - Container & Carton Codes**

Functions Tools Help

Branch/Plant	27				
Shipping (Y/N)	Y				
Skip to Code	CTN1				
Code	Description	Width	Dimensions	Height	UM
CTN1	Carton - Large 24x24x24	24.00	24.00	24.00	IN
Ship Priority	1	Shipping (Y/N)	Y Cubes . . .	13,824.00	CI
Available (Y/N)			Y Weight. . . .	3.00	LB
Tolerance . . .				85.00	90.00
CTN2	Carton - Medium 16x16x20	16.00	16.00	20.00	IN
Ship Priority	2	Shipping (Y/N)	Y Cubes . . . .	5,120.00	CI
Available (Y/N)			Y Weight. . . .	2.00	LB
Tolerance . . .				85.00	90.00
CTN3	Carton - Small 12x12x12	12.00	12.00	12.00	IN
Ship Priority	3	Shipping (Y/N)	Y Cubes . . . .	1,728.00	CI
Available (Y/N)			Y Weight. . . .	1.00	LB
Tolerance . . .				85.00	90.00
TOTE1	Tote - Small	12.00	18.00	6.00	IN
Ship Priority		Shipping (Y/N)	Y Cubes . . . .	.75	FC
Available (Y/N)			Y Weight. . . .		LB
Tolerance . . .				85.00	90.00

F5=Define Codes F24=More Keys

1. Complete the following fields:

- Branch/Plant
- Shipping Container
- Container Code
- Width
- Depth
- Height
- Unit Of Measure

2. Access the fold area.

3. Complete the following fields:

- Ship Priority
- Shipping Container
- Cubes
- Unit Of Measure
- Available Carton
- Weight
- Unit Of Measure
- Beginning Tolerance
- Ending Tolerance

Field	Explanation
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.

## Setting Up Carton Recommendation

You can have the system recommend a shipping carton for an item during picking.

The system checks the ship priority information to find a satisfactory shipping carton. The system does not recommend cartons that are not available.

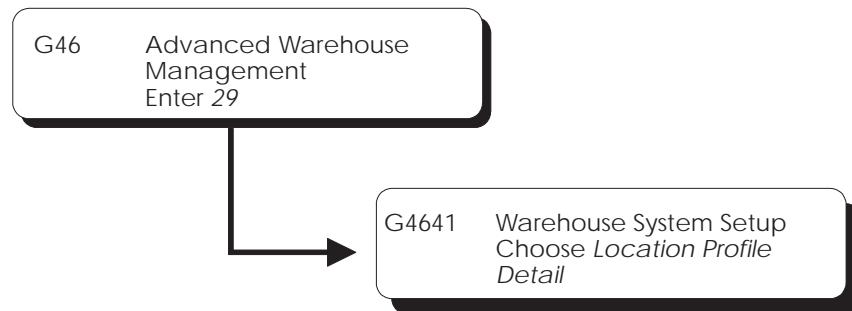
Setting up carton recommendation includes the following tasks:

- Setting up locations for carton recommendation
- Setting up carton recommendation methods for items
- Setting up carton fill percentages for items

## What You Should Know About

**Setting the Create Picking Tasks program to recommend shipping cartons** You must set a processing option in the Create Picking Tasks program to recommend shipping cartons while it creates tasks and trips for picking locations.

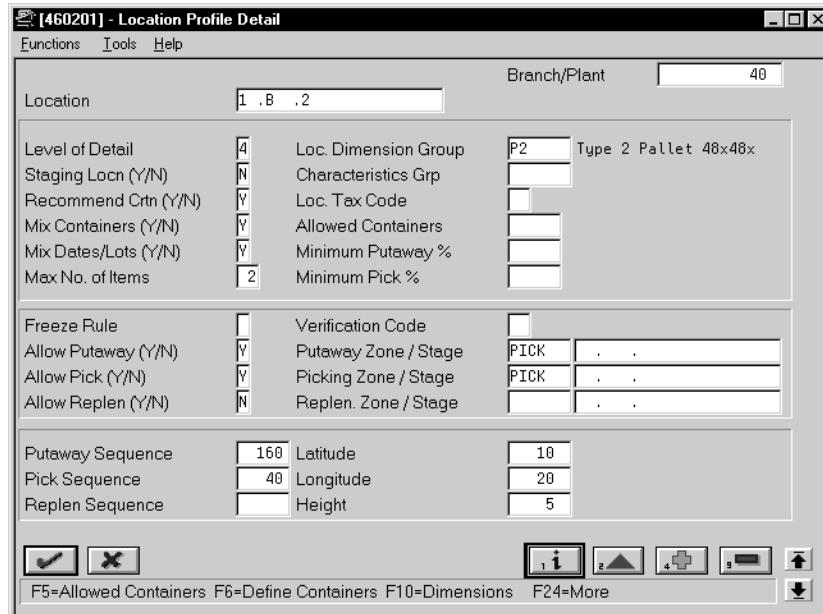
## Setting Up Locations for Carton Recommendation



You must set up picking locations to allow carton recommendation during picking.

### ► To set up locations for carton recommendation

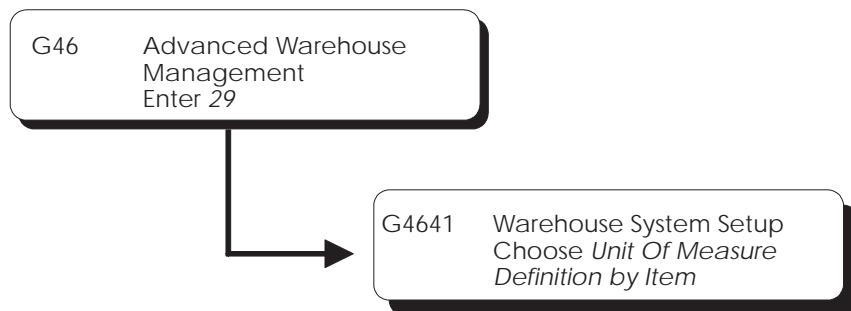
On Location Profile Detail



1. Locate the location for which you want to recommend cartons during picking.
2. Complete the following field:
  - Recommend Carton

Field	Explanation
Carton Recommendation	<p>A code that indicates whether the system recommends shipping cartons when it picks from this location.</p> <p>Valid codes are:</p> <p>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.</p> <p>N No, do not make carton recommendations when picking from this location.</p>

### Setting Up Carton Recommendation Methods for Items

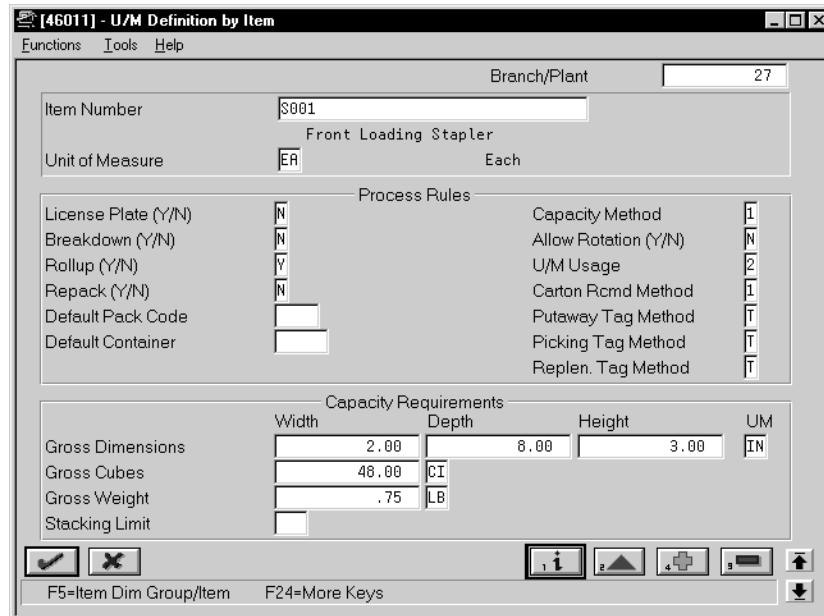


You must set up each item's carton recommendation method in that item's unit of measure definition. You can recommend cartons by item volume or by the percentage of the carton that the item fills.

#### ► To set up carton recommendation methods for items

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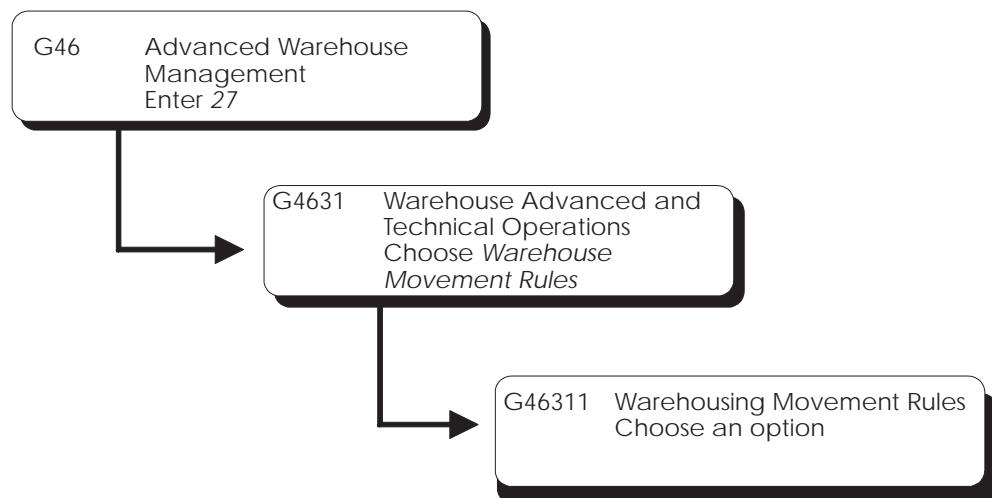
On Unit Of Measure Definition by Item



1. Locate the item for which you want to set up carton recommendation.
2. Complete the following field:
  - Carton Recommendation Method

Field	Explanation
Carton Recommendation Method	<p>A code that indicates the method the system uses to recommend a carton for the specified item in this unit of measure.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>blank Do not recommend cartons for the specified item in this unit of measure</li> <li>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</li> <li>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</li> </ul> <p>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).</p>

## Setting Up 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 an particular item can fill. You must set minimum and maximum allowable fill percentages to define the space the item can take up in the carton. During carton recommendation, the system uses these minimum and maximum percentages to determine which carton to choose for the picked item.

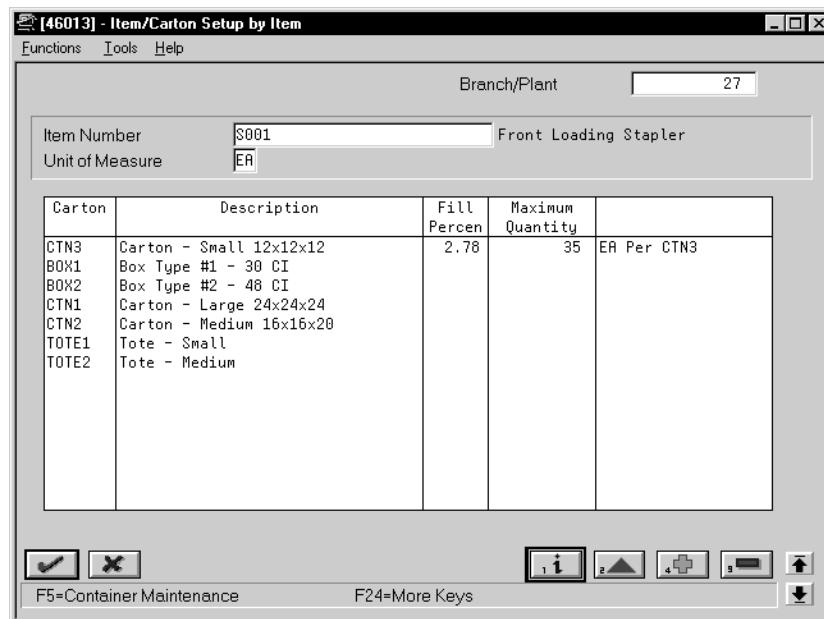
You can:

- Define fill percentages for individual items
- Define fill percentages for item dimension groups

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.

### ► **To define fill percentages for individual items**

On Item/Carton Setup by Item

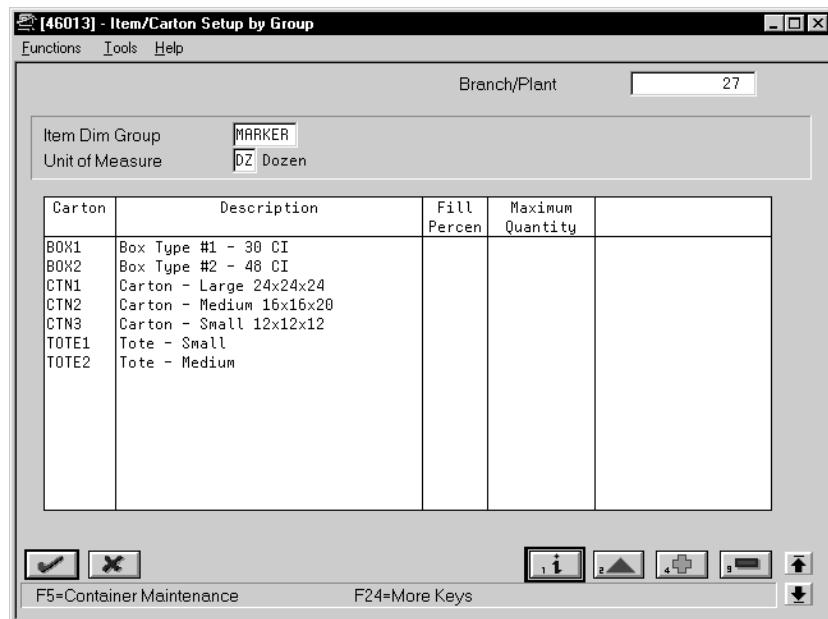


1. Complete the following fields:
  - Branch/Plant
  - Item Number
  - Unit of Measure
  - Carton Code
  - Fill Percentage
2. If you store the item in a container, access the fold area.
3. Complete the following field:
  - Container Code

► **To define fill percentages for item dimension groups**

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On Item/Carton Setup by Group



1. Complete the following fields:

- Branch/Plant
- Item Dimension Group
- Unit of Measure
- Carton
- Fill Percentage

2. If you store the item in a container, access the fold area.

3. Complete the following field:

- Container Code

<b>Field</b>	<b>Explanation</b>
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).
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
Unit of Measure	A user defined code (system 00/ type UM) that indicates in what quantity an inventory item is expressed; for example, CS (case) or BX (box).

Field	Explanation
Carton	A code (system 46/type 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 Container and Carton Codes (P46091) to define storage containers.
Description	A user defined name or remark that describes a field.
Fill Percentage	<p>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.</p> <p>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).</p>
Total – Transaction Quantity	The maximum quantity of an item that will fit in the selected shipping carton type.
Container Code	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.

# Process Selection

## Objectives

- To define combinations of order groups and warehouse process groups as a basis to select an action, such as putaway, picking, and replenishment

## About Process Selection

You automate inventory movement through your warehouse by defining rules that match items to movement instructions. The rules that match an item to a movement instruction are process selection rules.

Process selection matches the warehouse process group(s) and the order process group defined for an item to a specific process selection rule. The process selection rule points to a particular movement instruction. The document that creates the movement request determines which movement instruction the system uses. For example, a sales order for an item belonging to warehouse process group BULK and order group DISK might use the picking instruction table PICK1.

Process selection takes place after you create a movement request, but before you create location suggestions.

## See Also

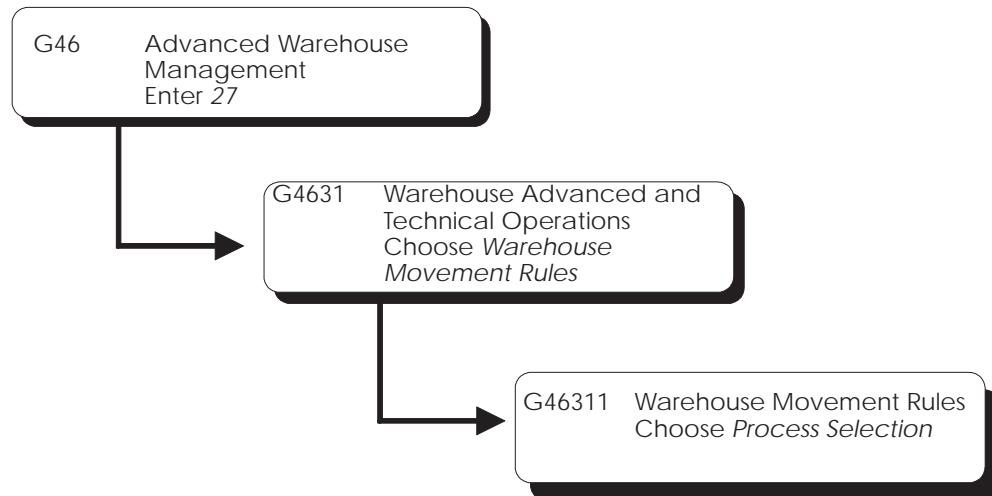
- *Setting Up Order Groups*
- *Setting Up Item Warehouse Information* for information about setting up warehouse process groups
- *Defining Movement Instructions*





# Define Process Selection

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## Defining Process Selection

You automate inventory movement through your warehouse by defining rules that match items to movement instructions. The rules that match an item to a movement instruction are process selection rules.

You use process selection to determine which movement instruction table to use during putaway, picking, or replenishment. This decision is based on the item's warehouse process group and order group, and on 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.

When you define process selection, 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.

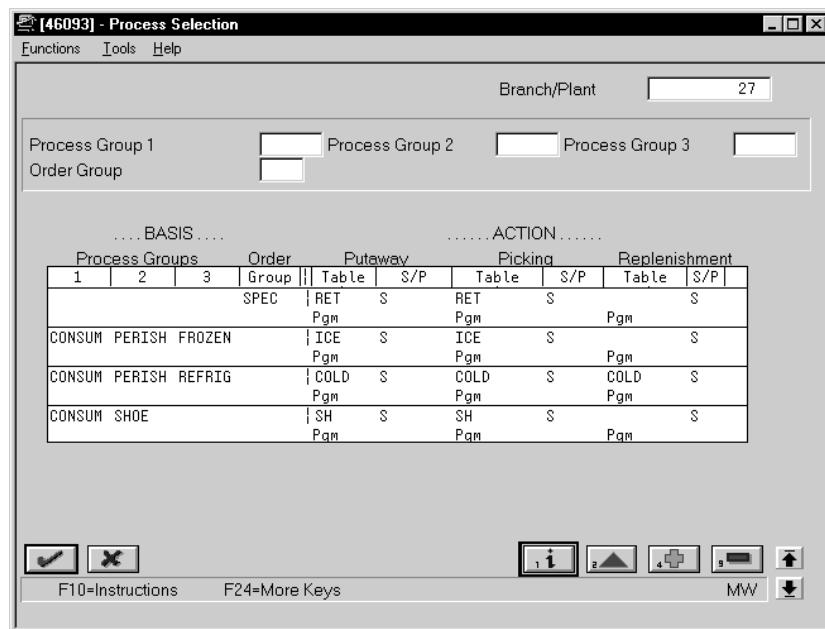
## ► To define process selection

On Process Selection

.... BASIS ....				..... ACTION .....					
Process Groups	Order	Putaway	Picking	Replenishment	Table	S/P	Table	S/P	
1	2	3	Group	Table	S/P	Table	S/P	Table	S/P
CONSUM	PERISH	FROZEN	SPEC	IRET	S	RET	S		S
CONSUM	PERISH	REFRIG		ICE	S	ICE	S		S
CONSUM	SHOE			COLD	S	COLD			S
EXPLOD	BOOMER			SH	S	SH	S		S
HAZMAT	BOOMER			BM2	S	BM2	S		S
HEALTH	ETHICL			BM1	S	BM1	S		S
HEALTH	OTC		CII	SC2	S	SC2	S		S
HEALTH	WATER		VIT	V1	S	V2	S	V3	S
NONINV				W1	S	W2	S	W1	S
OFC				NON	S	NON	S		S
OFC				OFC1	S	OFC1	S	OFC1	S
				E1	S	E1	S	E1	S

1. Complete the following field:
  - Branch/Plant
2. To view an existing process selection rule, you can limit the information that displays by completing the following fields in the upper portion of the form:
  - Process Group 1
  - Process Group 2
  - Process Group 3
  - Order Group
3. In the lower portion of the form, complete the following fields:
  - Process Group 1
  - Process Group 2
  - Process Group 3
  - Order Group

4. Complete one of the following fields for the process selection rule that you are defining:
  - Putaway Table
  - Picking Table
  - Replenishment Table
5. To modify the movement instruction table, complete the following field:
  - Process Mode
6. To use a custom program to create location suggestions, access the fold area.



7. Complete the following field:

- User Defined Program

Field	Explanation
Process Group 1	A code (system 41/type 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.
Process Group 2	A code (system 41/type 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.

Field	Explanation
Process Group 3	A code (system 41/type 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).
Putaway Process Method	A code (system 46/type PC) that identifies a putaway processing method.
	Valid codes are:
	P 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.
	S Space maximization mode. The system maximizes space use by trying to top off partially filled locations to minimize inventory fragmentation.
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).
Picking Process Method	A code (system 46/type PC) that identifies a picking processing method.
	Valid codes are:
	P 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.
	S Space maximization mode. The system maximizes space use by trying to top off partially filled locations to minimize inventory fragmentation.

Field	Explanation
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).
Replenishment Process Method	<p>A code (system 46/type PC) that identifies a replenishment processing method.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>P 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.</li> <li>S Space maximization mode. The system maximizes space use by attempting to top off partially filled locations to minimize inventory fragmentation.</li> </ul>
User Defined Program 1	A number that specifies the program you can write to determine valid putaway locations. The system uses this program instead of the J.D. Edwards program.
User Defined Program 2	A number that specifies the program you can write to determine valid pick locations. The system uses this program instead of the J.D. Edwards program.
User Defined Program 3	A number that specifies the program you can write to determine valid replenishment locations. The system uses this program instead of the J.D. Edwards program.



# Movement Instructions

## Objectives

- To create tables that determine which putaway, picking, or replenishment locations to suggest

## About Movement Instructions

You define movement instructions to control which locations the system suggests for putaway, picking, and replenishment. A movement instruction table contains many parameters that you use to refine the list of potential locations to the smallest possible number.

The system creates suggestions for only the locations that match all of the movement instruction table's parameters. You can set up many different movement instruction tables for putaway, picking, and replenishment.

You determine how the system chooses locations by setting parameters, such as:

- Whether to choose fixed locations or random locations
- Whether to limit the search for locations to a specific zone
- Which tiebreaker method to use to rank otherwise equally suitable locations

## See Also

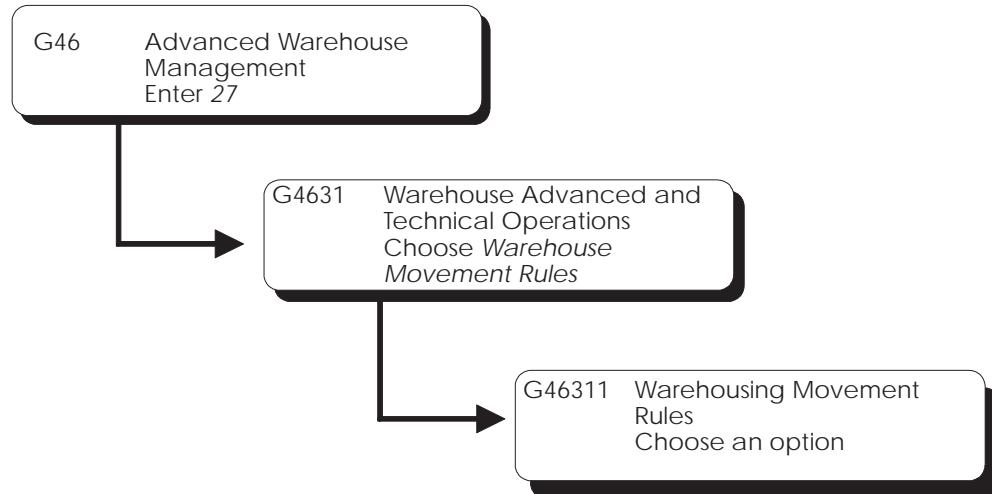
- *Appendix A — Advanced Topics* for information about random locations





# Define Movement Instructions

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## Defining Movement Instructions

You define movement instructions to control which locations the system suggests for putaway, picking, and replenishment. A movement instruction table contains many parameters that you use 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 possible 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 choose empty locations or existing 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 store 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 24 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 characteristic(s) specified in the random rule
- Whether the location characteristic is required or optional
- The priority of the optional characteristic
- Whether the system 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 eligible locations. You can also specify the process mode to use. You can choose to:

- Maximize warehouse space
- Maximize employee productivity
- Use other criteria that you define

Defining movement instructions includes:

- Setting the process mode
- Defining common movement instruction criteria
- Defining specific movement instruction criteria

## See Also

- *Setting Up Fixed Locations and Zones*
- *Appendix A — Advanced Topics* for information about random locations

## Setting the Process Mode

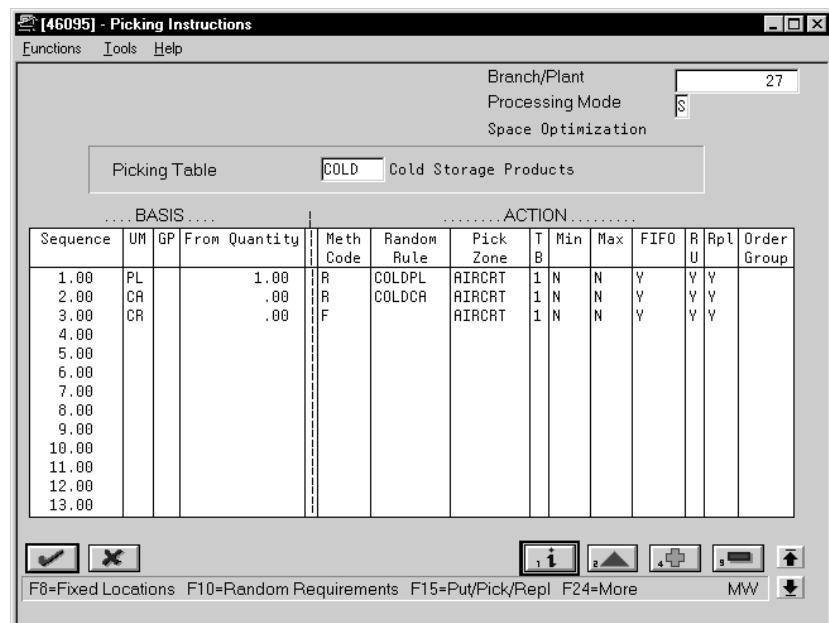
Typically, warehouses have limited space, so you might use the available space as efficiently as possible. If you do not have enough employees, you might use each employee's trips through the warehouse as efficiently as possible, to move as many items as you can per trip.

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 set the process mode

On Putaway Instructions, Picking Instructions, or Replenishment Instructions



Complete the following field:

- Processing Mode

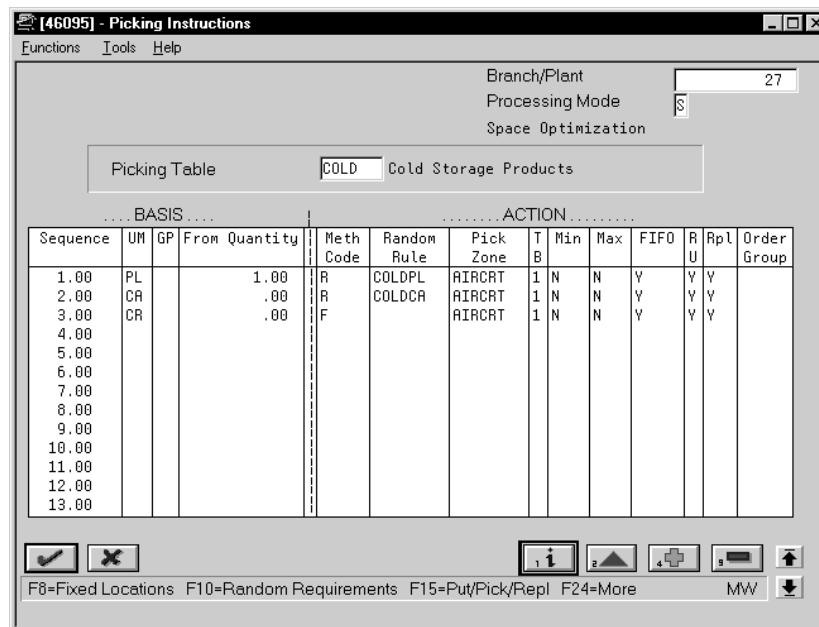
### Defining Common Movement Instruction Criteria

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.

#### ► To define common movement instruction criteria

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On Putaway Instructions, Picking Instructions, or Replenishment Instructions



Complete the following fields:

- Unit of Measure
- Unit of Measure Group
- From Quantity
- Method Code
- Random Rule

Field	Explanation
UM	<p>A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on.</p> <p>..... <i>Form-specific information</i> .....</p>
Unit of Measure Group	<p>When the system tries to carry out a movement instruction, it compares the unit of measure from the transaction to the unit of measure in the instruction. If the unit of measure is valid for the item, the instruction is valid for the item.</p> <ul style="list-style-type: none"> <li>• For putaway, the system uses the instruction for the level 1 unit of measure.</li> <li>• For picking and replenishment, the system compares the unit of measure in the first instruction to the item's unit of measure structure. If the unit of measure is in the structure, the system uses that instruction. If not, the system continues to compare until it finds a match.</li> </ul>
From Quantity	<p>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.</p> <p>You use unit of measure groups to set up movement instructions for putaway, picking, or replenishment.</p>
Movement Instructions Method	<p>The quantity that must exist in a location before the system considers the movement instruction.</p> <p>A code that identifies the method of putaway, picking, or replenishment the system uses for this instruction.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>F Use only fixed locations. This code is valid for putaway, picking and replenishment.</li> <li>R Use only random locations. You assign characteristics to random rules and to locations. The system compares rules to locations and builds a table of locations based on the number of matching characteristics. During random processing, the system chooses locations from the random location table. This code is valid for putaway, picking and replenishment.</li> <li>E Use only empty locations. This code is valid for putaway only.</li> <li>X Use only existing locations that already have the same item stored there. This code is valid for putaway only.</li> </ul>

Field	Explanation
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.

## Defining Specific Movement Instruction Criteria

Putaway, picking, and replenishment each have parameters that are specific to each movement type. These parameters further refine the list of potential locations.

Complete the following tasks:

- Define specific movement instruction criteria for putaway
- Define specific movement instruction criteria for picking
- Define specific movement instruction criteria for replenishment

### ► To define specific movement instruction criteria for putaway

---

On Putaway Instructions

Sequence	UM	GP	From Quantity	Method Code	Random Rule	Putaway Zone	T	B	Min	Max	Break	Top Off	A
1.00	PL		1.00	R	COLDPL	AIRCRT	2	N	N	Y	Y	Y	
2.00	CA		.00	R	COLDCA	AIRCRT	2	N	N	Y	Y	Y	
3.00	CR		.00	F		AIRCRT	2	N	N	N	N	N	
4.00													
5.00													
6.00													
7.00													
8.00													
9.00													
10.00													
11.00													
12.00													
13.00													

Complete the following fields:

- Putaway Zone
- Putaway Tiebreaker Rules
- Minimum Utilization Percentage
- Maximum Putaway Quantity
- Breakdown
- Top Off
- Allow Partial Units

---

<b>Field</b>	<b>Explanation</b>
Putaway Zone	A code (system 46/type ZN) that identifies areas in the warehouse where goods are put away or stored. ..... <i>Form-specific information</i> .....

---

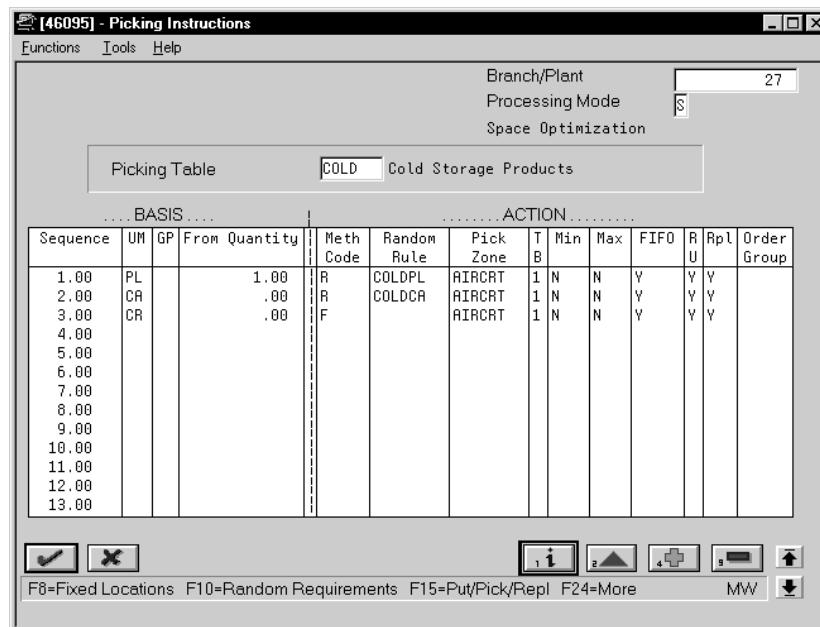
Field	Explanation
Putaway Tiebreaker	<p>A number that identifies the tiebreaker you want to use for this putaway rule when multiple locations satisfy the criteria. The system uses the tiebreaker to rank the tied locations. Tiebreakers are (hard coded) as follows:</p> <ul style="list-style-type: none"> <li>1 Sequence locations by the putaway 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 using Location Profile (P46020).</li> <li>2 Sequence locations by greatest available space. The system uses locations that can hold the greatest quantity of the item in the specified unit of measure and container first.</li> <li>3 Sequence locations by least available space. The system uses locations that can hold the least quantity of the item in the specified unit of measure and container first.</li> <li>4 Sequence locations by least available space, but minimize the number of locations used. This code is the same as tiebreaker 3, except the system tries to use the least number of locations.</li> <li>5 Sequence locations by proximity from the sending location (usually the receiving dock), using the closest locations first.</li> <li>6 Sequence locations by proximity to the base putaway location, using the closest locations first.</li> <li>7 Sequence locations by proximity to the base picking location, using the closest locations first.</li> </ul>
Minimum Utilization Percentage	<p>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).</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>Y Use the minimum utilization percentage when searching for putaway locations</li> <li>N Do not use the minimum utilization percentage when searching for putaway locations</li> </ul>

Field	Explanation
Maximum Quantity	<p>A code that indicates whether you want the system to suggest locations according to the maximum quantity of an item in the specified unit of measure that you can put away in a zone. You define maximum quantities for items in a specified unit of measure using Maximum Quantity by Zone (P46025).</p>
	<p>Valid codes are:</p>
	<p>Y Yes, use the maximum quantity allowed in a zone to suggest locations, and if the quantity in a zone exceeds the maximum, suggest another location for the remaining quantity</p>
	<p>N No, do not use maximum quantity when suggesting locations</p>
Breakdown	<p>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).</p>
	<p>Valid codes are:</p>
	<p>Y Yes, allow breakdown into smaller units of measure</p>
	<p>N No, do not allow breakdown into smaller units of measure</p>
<p>..... <i>Form-specific information</i> .....</p>	
<p>Enter Y in this field to specify that the system should attempt to break down units of measure when putting away goods. For example, if a quantity remains to be put away after processing all locations selected by an instruction, the system will check whether breakdown is allowed. If this field is set to Y, it tries to put away the remaining goods by breaking down the unit of measure to a smaller unit of measure using the same set of locations. The system can do this only if it is allowed for the item/unit of measure, which you define in through Item Unit of Measure Definition (P46011), and only if you use a unit of measure structure.</p>	
Top Off	<p>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.</p>
	<p>Valid codes are:</p>
	<p>Y Yes, search for locations with incomplete units of measure to top them off</p>
	<p>N No, do not search for locations with incomplete units of measure</p>

Field	Explanation
Allow Partial Units	<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 N, you must also set Breakdown to N.</p> <p>Valid codes are:</p> <p>Y Yes, put away partial units of measure N No, do not put away partial units of measure</p>

## ► To define specific movement instruction criteria for picking

### On Picking Instructions



Complete the following fields:

- Picking Zone
- Picking Tiebreaker
- Minimum Picking Percentage
- Maximum Picking Quantity
- First In First Out Picking
- Rollup
- Allow Replenishment
- Order Group

Field	Explanation
Picking Tiebreaker	<p>A number that identifies the tiebreaker you want to use for this picking rule when multiple locations satisfy the criteria. The system uses the tiebreaker to rank the tied locations. Tiebreakers are (hard coded) as follows:</p> <ul style="list-style-type: none"> <li>1 Sequence locations using “pick to clear” logic. The system uses the locations containing the smallest available quantity first.</li> <li>2 Sequence locations using “pick from fewest with best fit” logic. The system uses the locations that will contain the least residual quantity when the pick is complete.</li> <li>3 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.</li> <li>4 Sequence locations according to the picking 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).</li> <li>5 Sequence locations according to proximity to the shipping location, using the closest locations first.</li> </ul>
Minimum Utilization Percentage	<p>A code that indicates whether the system suggests a location if picking will not deplete that location to at least the minimum percentage capacity defined through Location Profile Detail (P460201).</p>
Maximum Quantity	<p>Valid codes are:</p> <ul style="list-style-type: none"> <li>Y Yes, use the minimum utilization percentage when searching for pick locations</li> <li>N No, do not use the minimum utilization percentage when searching for pick locations</li> </ul> <p>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).</p>

Field	Explanation
FIFO Picking	<p>A code that indicates whether the system considers an item's receipt date when it searches for pick locations.</p> <p>Valid codes are:</p>
	<p>Y Yes, use the oldest receipt date (First In First Out method) when searching for pick locations</p> <p>N No, do not use the oldest receipt date when searching for pick locations</p>
RU (Rollup)	<p>A code that indicates whether you allow rollup during picking. Valid codes are:</p>
	<p>Y Allow rollup</p> <p>N Do not allow rollup</p>
	<p>..... <i>Form-specific information</i> .....</p>
	<p>Enter Y to have the system convert the pick quantity to the highest unit of measure available at the location, provided the quantity justifies the rollup.</p>
Allow Replenishment	<p>A code that indicates whether you allow replenishment from a location (Location Profile (P46020) and Location Profile Detail (P460201)) or whether a picking instruction triggers replenishment (Picking Instructions (P46095)).</p>
	<p>..... <i>Form-specific information</i> .....</p> <p>Enter Y to trigger replenishments when there is not enough inventory to satisfy pick requests at the selected locations. This is online replenishment and works only when you pick from fixed locations. Replenishment also occurs if a pick drives a location below the minimum replenishment point defined on Fixed Picking Locations (P46012).</p>
Order Group	<p>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.</p>
	<p>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.</p>

### ► **To define specific movement instruction criteria for replenishment**

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On Replenishment Instructions

[46095] - Replenishment Instructions

Functions Tools Help

Branch/Plant 27  
Processing Mode S  
Space Optimization

Replenishment Table COLD Cold Storage Products

.... BASIS ....				..... ACTION .....							
Sequence	UM	GP	From Quantity	Method Code	Random Rule	Replen Zone	T B	Min	Max	FIFO	R/Up
1.00	PL		1.00	R	COLDPL	AIRCRT	1	N	N	Y	N
2.00	CR		.00	R	COLDCA	AIRCRT	1	N	N	Y	Y
3.00	CR		.00	F		AIRCRT	5	N	N	Y	Y
4.00											
5.00											
6.00											
7.00											
8.00											
9.00											
10.00											
11.00											
12.00											
13.00											

F8=Fixed Locations F10=Random Requirements F15=Put/Pick/Repl F24=More MW

Complete the following fields:

- Replenishment Zone
- Replenishment Tiebreaker
- Minimum Utilization Percentage
- Maximum Replenishment Quantity
- First In First Out Picking
- Rollup

Field	Explanation
Replenishment Zone	<p>A code (system 46/type ZN) that identifies the areas in the warehouse from which items are retrieved to replenish or refill picking locations.</p> <p>..... <i>Form-specific information</i> .....</p> <p>Enter a zone in this field to restrict the list of replenishment zones to this one zone. You define replenishment zones on Fixed Replenishment Zones (P46051).</p>

Field	Explanation
Replenishment Tiebreaker	<p>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:</p> <ul style="list-style-type: none"> <li>1 Sequence locations using “pick to clear” logic. The system uses the locations containing the smallest available quantity first.</li> <li>2 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.</li> <li>3 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.</li> <li>4 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).</li> <li>5 Sequence locations according to proximity to the shipping location, using the closest locations first.</li> </ul>
Minimum Utilization Percentage	<p>A code that indicates whether the system suggests a location if picking will not deplete that location to at least the minimum percentage capacity defined through Location Profile Detail (P460201).</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>Y Yes, use the minimum utilization percentage when searching for pick locations</li> <li>N No, do not use the minimum utilization percentage when searching for pick locations</li> </ul>

Field	Explanation
Maximum Quantity	<p>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).</p>
	<p>Valid codes are:</p>
	<p>Y 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</p>
	<p>N No, do not use the maximum picking quantity when suggesting picking locations</p>
FIFO Picking	<p>A code that indicates whether the system considers an item's receipt date when it searches for pick locations.</p>
	<p>Valid codes are:</p>
	<p>Y Yes, use the oldest receipt date (First In First Out method) when searching for pick locations</p>
	<p>N No, do not use the oldest receipt date when searching for pick locations</p>
RU (Rollup)	<p>A code that indicates whether you allow rollup during picking. Valid codes are:</p>
	<p>Y Allow rollup</p>
	<p>N Do not allow rollup</p>
<p>..... <i>Form-specific information</i> .....</p>	
<p>Enter Y to have the system convert the pick quantity to the highest unit of measure available at the location, provided the quantity justifies the rollup.</p>	



Daily



# Putaway

## Objectives

- To create putaway requests
- To locate existing putaway requests
- To create suggestions for putaway requests
- To confirm suggestions for putaway requests

## About Putaway

You use putaway to receive the items into the warehouse and move them from the receiving dock to a storage location. The receiving dock is usually the default location for incoming items, but you can put away items directly to stocking locations and bypass the receiving dock.

You create a putaway request in response to a purchase order (or a manufacturing completion, for manufacturing systems). You use putaway requests to generate suggestions for locations in which to store items. The system tracks the items in each location. You can find locations with available space and characteristics that match the incoming item and then create suggestions to store items in those locations.

You can use the locations that the system suggests for you or use different locations. You then confirm your chosen locations to move the items from the receiving dock to the putaway location, and to update the system's inventory records.

The putaway process includes:

- Working with putaway requests
- Working with putaway reservations (optional)
- Working with putaway suggestions

## See Also

- *Appendix B — Manufacturing Information* for information on creating putaway requests through manufacturing systems





# Work with Putaway Requests

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## Working with 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
- Unit of measure
- Quantity
- Transaction document information

The system uses this information to create suggestions for putaway, based on the putaway instructions that you define.

Complete the following tasks:

- Create putaway requests
- Locate existing putaway requests

### See Also

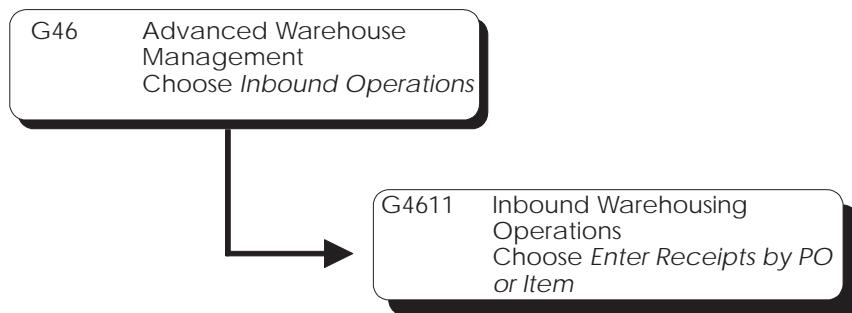
- *Appendix B — Manufacturing Information* for information about creating putaway requests through manufacturing processes

## Creating Putaway Requests

You create putaway requests to generate suggestions for putaway locations. You can:

- Create putaway requests interactively
- Create putaway requests manually

### Creating Putaway Requests Interactively



After you receive the items on a purchase order, you can create a putaway request to store the items. This is the most common method of creating putaway requests. (You also can create putaway requests manually, or reserve locations for putaway.) You use these putaway requests to create suggestions for putaway locations.

You can set the processing options in Enter Receipts by PO or Item (or Work Order Entry for manufacturing systems) to determine whether you:

- Create requests only
- Create and process requests using the subsystem
- Receive items directly into reserved locations
- Do not create any requests

If you create putaway requests only, you must create location suggestions and confirm location suggestions separately.

If you create and process putaway requests using the subsystem, the subsystem creates putaway suggestions. The subsystem also can confirm the putaway suggestions, create tasks and trips, and print movement tags, slips, and audit reports (depending on how you set the processing options in each program).

You also can receive items directly into reserved putaway locations. You first must create reservations using Online Reservations or Batch Reservations before you receive the items. When you run the Process Putaway Requests program, the system creates a putaway suggestion for the reserved location.

If you do not create putaway requests through purchase order receipts, items that you receive will remain in your receiving location. You can then:

- Create putaway requests manually

- Create putaway requests by reversing receipt of the order(s), setting the program's processing options to create putaway requests, and receiving the order(s) again

Complete the following tasks:

- Create putaway requests interactively
- Override the unit of measure structure

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. You 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 do this to avoid occupying pallet space in your warehouse with partial pallets, which 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 eacles for putaway.

You can also override the quantity, containers, weight, repack code, and tax code for each level of the unit of measure structure. This alters the item characteristics and can change the location you use for putaway.

The system displays Warehouse Overrides only if you activate warehouse control in Branch/Plant Constants.

The screenshot shows the SAP [43111] - Enter Purchase Orders screen. The top menu bar includes Functions, Options, Tools, and Help. The main area displays purchase order details:

- Branch/Plant: 27
- Order Date: 05/13/96
- Cancel Date: (empty)
- G/L Date: 05/13/96
- Order Number: 9776 [OP]
- Supplier: 4343 Vector Manufacturing Co
- Ship To: 545 Eastern Area Distribution
- Requested: 05/13/96
- Promised: 05/13/96
- Cost Rule: (empty)
- Amount: 120.00
- Skip To Line #: (empty)

Below these details is a message: \*\*\*\* Enter "Y" to Record Order with a Y key indicator.

The item list table has columns: Item Number, Quantity, Unit Cost, Extended Cost, and LT [0]. The data in the table is as follows:

Item Number	Quantity	Unit Cost	Extended Cost	LT [0]
CD	24	5.0000	120.00	\$
Desc 1	Compact Disk-Various Artists	Requested	05/13/96	
Desc 2		Promised Deliv	05/13/96	
Asset I/D		Cancel Date		
Location	R.	G/L Date	05/13/96	
Trans. UOM	EA	Discount Fctr	1.0000	
Purch. UOM	EA	Price Rule		
Last Sts	220	Related Order		
Next Sts	280	Line Number	1.000	
Cost Rule	Taxable	Agreement Nbr		

At the bottom of the screen are function keys: F6=Summary, F15=PO Header, F24=More Keys, Opt: 1=Detail, 3=Text, 9=Del, and a toolbar with icons for Save, Cancel, and others.

► **To create putaway requests interactively**

On Enter Receipts by PO or Item

1. Complete the following fields:
  - Branch/Plant
  - Order Number
  - Document Type
2. Choose Receive for each purchase order line that you want to receive.

Field	Explanation
Document	A number that identifies a document. For example, the document can be a purchase order, invoice, or sales order.
Document Type	A code (system 00/type DT) that identifies the type of document, such as an order or an invoice.

### What You Should Know About

<b>Purchase order detail location</b>	After you activate warehouse control, the system inputs the receipt location when you enter a purchase order. You specify this location in Default Receiving Location on Branch/Plant Constants – Pg 2.
<b>Receipt routing</b>	Receipt routing in the Purchase Management system allows you to divert items between receipt and putaway, so you can perform quality analysis on the items. If you use receipt routing, the system creates a putaway request when you move the items to the on-hand step, which creates a receipt.

### Processing Options for Receipts by PO or Item

<b>Default Values:</b>	
1. Order Type	_____
2. Receipt Document Type	_____
<b>Incoming Acceptable Next Status Codes:</b>	
3. Status Code 1	_____
4. Status Code 2	_____
5. Status Code 3	_____
<b>Outgoing Next Status Codes:</b>	
6. Partial receipt	_____
7. Close balance of line	_____
8. Cancel balance of line	_____
<b>Prompting Control:</b>	
Enter a '1' to:	
9. Select all lines for receipt.	_____
10. Be prompted to accept the receipt.	_____

11. Display lot/layer information. \_\_\_\_\_  
 12. Display Sales Order Backorders. \_\_\_\_\_  
 13. Record serial number information for inventory items. \_\_\_\_\_

14. Enter a '1' to protect prices, or a '2' to make prices non-display. If left blank, the update of prices is allowed. \_\_\_\_\_

15. Enter a '1' to require manual entry of the quantity. If left blank, the quantity field will be loaded. \_\_\_\_\_  
 16. Enter a '1' to display description. If left blank, the item/account number will be displayed. \_\_\_\_\_  
 17. Enter the format to be displayed.  
     1 = Receipts by Purchase Order  
     2 = Receipts by Item  
     3 = Receipts by G/L Account  
 (If left blank, format 1 is used.) \_\_\_\_\_

**Landed Cost Processing:**

18. Enter a '1' to display the landed cost video, or a '2' to perform blind landed cost processing. If left blank, no landed cost processing is performed. \_\_\_\_\_

**Tolerance Checking:**

Enter a '1' for a warning message, or a '2' to prohibit entry. If left blank, no tolerance checking is performed.

19. Quantity, Unit Cost, Amount \_\_\_\_\_  
 20. Receipt Date \_\_\_\_\_

**Item Branch/Location Processing:**

21. Enter a '1' to update the supplier when an item is purchased the first time, or a '2' to update the supplier every time the item is purchased. If left blank, no supplier update is performed. \_\_\_\_\_  
 22. Enter a '1' to default the Location and Lot Number from the primary item balance location, if the Location and Lot Number are both blank. \_\_\_\_\_

**Dream Writer Versions:**

Enter the version for each program:  
 If left blank, ZJDE0001 will be used.

23. Open Order Inquiry (P430301) \_\_\_\_\_  
 24. G/L Functional Server (XT0911Z1) \_\_\_\_\_  
 25. SO Backorder Release (P42117) \_\_\_\_\_  
 26. Receipt Traveler (P43512) \_\_\_\_\_  
 27. Receipt Routing (P43250) \_\_\_\_\_

**Document Processing:**

28. Enter a '1' to automatically print a Receipt Traveler Document following each receipt. \_\_\_\_\_

**Kit Processing:**

29. Enter a '1' to display the kit parent item, or a '2' to display the kit component items. If left blank, no kit information is displayed. \_\_\_\_\_

**Supplier Analysis:**

30. Enter a '1' to capture supplier analysis information. If left blank, no supplier analysis information is captured. \_\_\_\_\_

**Associated Text Processing:**

31. Enter a '1' to purge the associated text when the line is fully received. If left blank, the text is retained. \_\_\_\_\_

**Receipt Acknowledgment:**

32. Enter a '1' to send a PPAT message to the purchase order originator regarding the receipt. \_\_\_\_\_

33. Enter the next status code that the Sales Order should be updated to upon full receipt of a direct ship purchase order line. \_\_\_\_\_

**Receipt Routing:**

34. Enter a '1' to initiate the receipt routing process. If left blank, all items will be received directly into stock. \_\_\_\_\_

**Summarization:**

35. Enter a '1' to summarize journal entries. If left blank, journal entries are written in detail. \_\_\_\_\_

NOTE: If tracking commitments in the PA/PU ledgers, this option may NOT be used.

**Warehouse Processing:**

36. Enter the Directed Putaway mode:  
' ' : No Directed Putaway Requests  
'1' : Request Putaway only  
'2' : Request Putaway and process using the subsystem  
'3' : Receive directly to reserved locations (No requests). \_\_\_\_\_

37. If processing putaway requests through the subsystem, enter the DREAM Writer version to be used.  
If blank, XJDE0001 is used.  
(See Form ID P46171). \_\_\_\_\_

38. Enter the DREAM Writer version of On-Line Reservations to be used.  
If blank, ZJDE0001 is used.  
(See Form ID P46130) \_\_\_\_\_

**Currency Processing:**

39. Enter the date to be used when \_\_\_\_\_

retrieving the currency exchange rate. If left blank, the purchase order exchange rate will be used.

- 1 = G/L Date
- 2 = Current Date

40. Enter a '1' to protect the exchange rate field. \_\_\_\_\_

**Bulk Item Processing:**

41. Enter '1' to record the difference between ambient and standard quantities received as a temperature gain/loss. Enter '2' to update the unit cost as the extended cost divided by the standard quantity. Leave blank if quantities are purchased and received in standard.

**Direct Ship Order Processing:**

(LOAD & DELIVERY MANAGEMENT ONLY)

42. Enter a '1' if related sales order lines should be automatically load and deliver confirmed. 43. Enter the sales order next status code beyond which sales orders will not be automatically load and deliver confirmed. 44. Enter the version of the transportation transaction server to be used to automatically load and deliver confirm orders. \_\_\_\_\_

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► **To override the unit of measure structure**

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On Enter Receipts by PO or Item

1. Complete the following fields:
  - Branch/Plant
  - Order Number
  - Document Type
2. Choose Warehouse Overrides for the line whose unit of measure structure you want to change.

**[46UOM] - Warehouse Overrides**

Functions Tools Help

Branch/Plant		27							
Order Number	9776 OP	Line Number	1.000						
Item Number	CD								
Description	Compact Disk-Various Artists								
Open Quantity	24	EA							
Level 1	UM	Level 2	UM	Level 3	UM	Level 4	UM	Level 5	UM
24	EA								
Conthr		Conthr		Conthr		Conthr		Conthr	
Wt		Wt		Wt		Wt		Wt	
Repack / Code				Loc. Tax Code					
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>									
F10=Weights & Measures F24=More Keys									

3. On Warehouse Overrides, complete the following fields:

- Level 1
- Unit Of Measure
- Level 2
- Unit Of Measure
- Level 3
- Unit Of Measure
- Level 4
- Unit Of Measure
- Level 5
- Unit Of Measure

4. Access the fold area.

5. Complete the following optional fields:

- Weight
- Container
- Repack
- Pack
- Location Tax Code

Field	Explanation												
Quantity – Total Level 1	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 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.												
Unit of Measure – Level 1	<p>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, is the highest level in the structure.</p> <p>For example, a unit of measure structure could be as follows:</p>												
	<table> <thead> <tr> <th data-bbox="780 868 833 895">Level</th> <th data-bbox="845 868 1046 895">Unit of Measure</th> </tr> </thead> <tbody> <tr> <td data-bbox="780 899 801 927">1</td> <td data-bbox="845 899 926 927">Pallet</td> </tr> <tr> <td data-bbox="780 931 801 958">2</td> <td data-bbox="845 931 1274 958">Box, where 10 boxes equal 1 pallet</td> </tr> <tr> <td data-bbox="780 963 801 990">3</td> <td data-bbox="845 963 1241 990">Case, where 5 cases equal 1 box</td> </tr> <tr> <td data-bbox="780 994 801 1022">4</td> <td data-bbox="845 994 1356 1022">Interpack, where 8 interpacks equal 1 case</td> </tr> <tr> <td data-bbox="780 1026 801 1053">5</td> <td data-bbox="845 1026 1339 1058">Each, where 10 eaches equal 1 interpack</td> </tr> </tbody> </table>	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
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1	Pallet												
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4	Interpack, where 8 interpacks equal 1 case												
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	<p>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.</p>												
	<p>You can have five levels in an item's unit of measure structure.</p>												
Quantity – Total Level 2	The total quantity of the item in the item's level 2 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 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.												

Field	Explanation												
Unit of Measure – Level 2	<p>The item's level 2 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, is the highest level in the structure.</p> <p>For example, a unit of measure structure could be as follows:</p> <table><thead><tr><th>Level</th><th>Unit of Measure</th></tr></thead><tbody><tr><td>1</td><td>Pallet</td></tr><tr><td>2</td><td>Box, where 10 boxes equal 1 pallet</td></tr><tr><td>3</td><td>Case, where 5 cases equal 1 box</td></tr><tr><td>4</td><td>Interpack, where 8 interpacks equal 1 case</td></tr><tr><td>5</td><td>Each, where 10 eaches equal 1 interpack</td></tr></tbody></table> <p>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.</p> <p>You can have five levels in an item's unit of measure structure.</p>	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
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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												
Quantity – Total Level 3	<p>The total quantity of the item in the item's level 3 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 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.</p>												

Field	Explanation
Unit of Measure – Level 3	<p>The item's level 3 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, is the highest level in the structure.</p>
	<p>For example, a unit of measure structure could be as follows:</p>
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
Quantity – Total Level 4	<p>The total quantity of the item in the item's level 4 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 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.</p>

Field	Explanation												
Unit of Measure – Level 4	<p>The item's level 4 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, is the highest level in the structure.</p> <p>For example, a unit of measure structure could be as follows:</p> <table><thead><tr><th>Level</th><th>Unit of Measure</th></tr></thead><tbody><tr><td>1</td><td>Pallet</td></tr><tr><td>2</td><td>Box, where 10 boxes equal 1 pallet</td></tr><tr><td>3</td><td>Case, where 5 cases equal 1 box</td></tr><tr><td>4</td><td>Interpack, where 8 interpacks equal 1 case</td></tr><tr><td>5</td><td>Each, where 10 eaches equal 1 interpack</td></tr></tbody></table> <p>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.</p> <p>You can have five levels in an item's unit of measure structure.</p>	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
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3	Case, where 5 cases equal 1 box												
4	Interpack, where 8 interpacks equal 1 case												
5	Each, where 10 eaches equal 1 interpack												
Quantity – Total Level 5	<p>The total quantity of the item in the item's level 5 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 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.</p>												

Field	Explanation												
Unit of Measure – Level 5	<p>The item's level 5 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, is the highest level in the structure.</p>												
	<p>For example, a unit of measure structure could be as follows:</p>												
	<table> <tr> <td data-bbox="780 557 845 585">Level</td> <td data-bbox="845 557 1057 585">Unit of Measure</td> </tr> <tr> <td data-bbox="780 587 845 614">1</td> <td data-bbox="845 587 931 614">Pallet</td> </tr> <tr> <td data-bbox="780 616 845 644">2</td> <td data-bbox="845 616 1279 644">Box, where 10 boxes equal 1 pallet</td> </tr> <tr> <td data-bbox="780 646 845 673">3</td> <td data-bbox="845 646 1241 673">Case, where 5 cases equal 1 box</td> </tr> <tr> <td data-bbox="780 675 845 703">4</td> <td data-bbox="845 675 1361 703">Interpack, where 8 interpacks equal 1 case</td> </tr> <tr> <td data-bbox="780 705 845 732">5</td> <td data-bbox="845 705 1339 732">Each, where 10 eaches equal 1 interpack</td> </tr> </table>	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
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	<p>You can have five levels in an item's unit of measure structure.</p>												
Weight – Level 1	<p>The weight of one item per unit of measure, or the weight of the item and container in the level 1 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).</p>												
Container Code – Level 1	<p>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:</p> <ul style="list-style-type: none"> <li data-bbox="796 1241 1418 1298">An open container, where items are stored on the container (for example, a pallet)</li> <li data-bbox="796 1300 1418 1358">A closed container, where items are stored in the container (for example, a box)</li> </ul>												
	<p>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.</p>												
Repack (Y/N)	<p>A code that determines whether the specified item in this unit of measure should be repacked before putaway. Valid codes are:</p>												
	<table> <tr> <td data-bbox="780 1630 817 1657">Y</td> <td data-bbox="845 1630 1106 1657">Yes, repack the item</td> </tr> <tr> <td data-bbox="780 1660 817 1687">N</td> <td data-bbox="845 1660 1176 1687">No, do not repack the item</td> </tr> </table>	Y	Yes, repack the item	N	No, do not repack the item								
Y	Yes, repack the item												
N	No, do not repack the item												
	<p>You must also specify a packing method by entering a code in the Default Pack Code field.</p>												

Field	Explanation
Packing Code	A code (system 46/type PK) that identifies the packing materials to use (such as opaque shrink wrap, or foam nuggets) if repacking is required before putaway. If you set the Repack (Y/N) field to Y, you must enter a code in this field. You define the packing codes on User Defined Code Revisions.
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).

### What You Should Know About

**Changing units of measure**

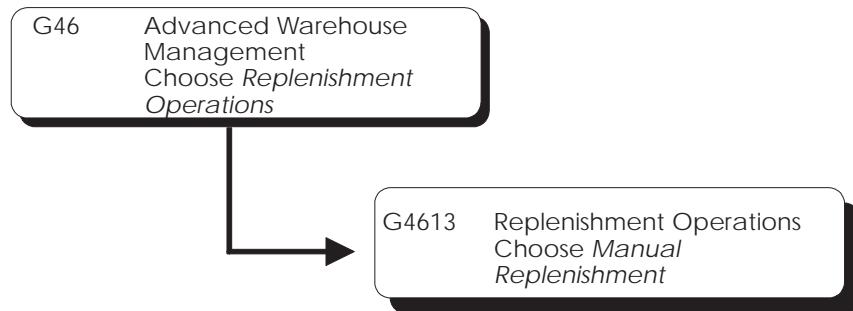
You can use Warehouse Overrides to delete a unit of measure so that the system uses a smaller unit of measure during putaway. You cannot use Warehouse Overrides to specify a larger unit of measure if you have not defined it on Item Units of Measure.

**Changing a unit of measure structure**

After you change a unit of measure structure, the system verifies the following:

- The last level you specified in the structure is the primary unit of measure.
- The units of measure are listed in order from largest to smallest.
- The structure uses whole number conversions between units of measure.
- Each unit of measure contains only one partial quantity for that unit.

## Creating Putaway Requests Manually



You can create manual putaway requests to create suggestions for putaway locations. You create manual putaway requests to:

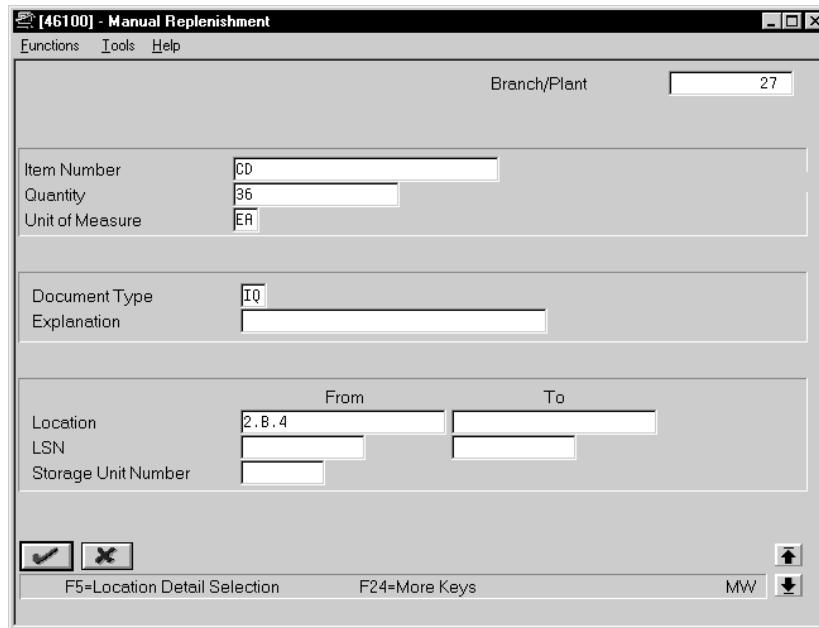
- Store incoming items in the warehouse if the system did not automatically create a putaway request through purchase order receipts or manufacturing completions
- Store incoming items that have a document type that the system normally would not consider for putaway during receipts

To create a manual putaway request, you must have actually received the item into the warehouse.



### **To create putaway requests manually**

On Manual Replenishment



Complete the following fields:

- Branch/Plant
- Item Number
- Quantity
- Unit of Measure
- From Location

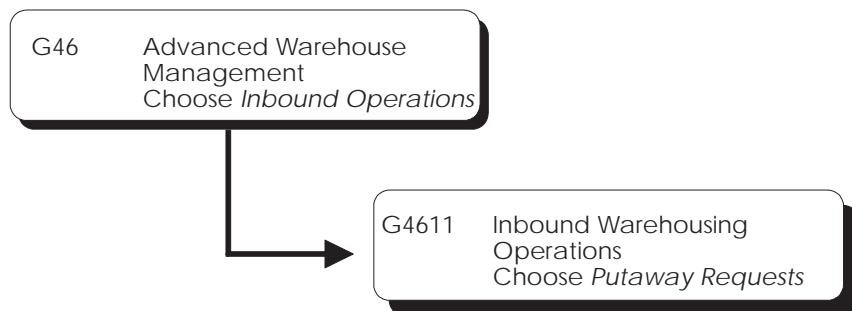
Field	Explanation
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
From Location	<p>The storage location from which goods will be moved.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The system creates either a putaway or a replenishment request based on how you complete the From Location and the To Location fields:</p> <ul style="list-style-type: none"> <li>• Putaway Requests — To create a putaway request, enter a location in the From Location field.</li> <li>• Replenishment Requests — To create a replenishment request, enter a location in both the From Location and the To Location fields, or enter a location in only the To Location field.</li> </ul>

## What You Should Know About

### Using manual replenishment to create putaway requests

On Manual Replenishment, if you specify only the From Location, you take inventory from that location and create a suggestion for putaway. To transfer inventory from a specific location, such as the receiving dock, and put it away to another specific location, you must complete the To Location (either by itself or with a From Location) to initiate a manual replenishment.

## Locating 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.

### ► To locate existing putaway requests

On Putaway Requests

**[4600] - Putaway Requests**

Functions Options Tools Help

Request Batch	<input type="text"/>	Branch/Plant	27
Order Number	<input type="text"/> *	Status	200
Item Number	<input type="text"/>	Request Created	

O	Batch	Seq	Item	Quantity	UM	From Location
	3201	1.000	DIS001	2	EA	R. .
	3208	1.000	M001	50	CA	4.A .2
	3211	1.000	TS001	25	PR	R. .
	3211	2.000	TS002	25	PR	R. .

Opt: 9=Cancel F3=Exit F24=More MW

1. Complete the following field:
  - Branch/Plant
2. Complete one or more of the following optional fields:
  - Status
  - Request Batch
  - Order Number
  - Document Type
  - Item Number

---

Field	Explanation
Status – Task / Trip	A code (system 46/type PS) that identifies the current status of a putaway, picking, or replenishment request (F4600) or trip (F4611) within the Advanced Warehouse Management system.
Batch Number – Requests	The batch number assigned to one set of putaway, picking, or replenishment requests. This number comes from next numbers for system 46.
Document	A number that identifies a document. For example, the document can be a purchase order, invoice, or sales order.
Document Type	A code (system 00/type DT) that identifies the type of document, such as an order or an invoice.

---

## What You Should Know About

### **Cancelling putaway requests**

You can use Putaway Requests to cancel putaway requests. You cancel requests to stop further processing and putaway. For example, if the items you received are damaged, you would cancel the putaway request.

You must first cancel any existing putaway suggestions for the request before you cancel the putaway request.

You can also cancel putaway requests by reversing receipt of a purchase order.

## Processing Options for Request Inquiry

### **Display Option:**

1. Enter the type of requests to view:  
1 = Putaway Requests  
2 = Pick Requests  
3 = Replenishment Requests  
(If blank, putaway requests will display.)

### **Default Value:**

2. Enter the default Request Status to use. If blank, the "Ready to Suggest" status (200) is used.

### **Picking Option:**

3. Enter the override next status for sales order lines when requests are canceled.



# Work with Putaway Reservations

---

## Working with Putaway Reservations

You create putaway reservations to receive incoming items directly into specific locations that you reserve, instead of receiving items into your default receiving location. This makes putaway more efficient, because space is already reserved for the items prior to receipt. (You can also create putaway reservations during location selection after you receive the items.) When you receive the items, you have the choice of using the reservation or allowing the system to suggest putaway locations. You can create a reservation for all the items on a purchase order line or you can split the line into multiple location reservations.

Working with reservations is an optional task during putaway. Working with reservations includes the following tasks:

- Creating putaway reservations
- Changing existing putaway reservations

### What You Should Know About

**Processing reservations using the Level 1 unit of measure**

While creating suggestions for putaway reservation locations, the system uses the Level 1 (largest) unit of measure for each item in the unit of measure structure. If you do not use a unit of measure structure, the system uses the primary unit of measure.

## Creating Putaway Reservations

You create putaway reservations to set aside space in specific locations for incoming items. You can enter the locations you want to reserve or allow the system to suggest locations to reserve for putaway.

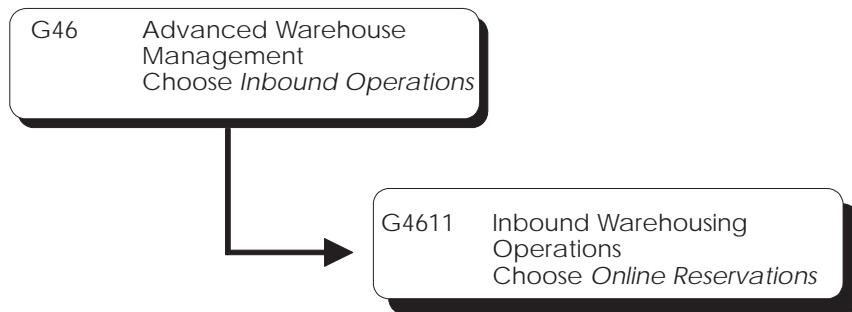
Complete the following tasks:

- Create putaway reservations interactively
- Create putaway reservations by batch

- Create alternate putaway reservations

You create alternate reservations to replace existing reservations with which you do not agree.

### Creating Putaway Reservations Interactively



You create putaway reservations interactively to reserve 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.

Complete the following tasks:

- Create putaway reservations for all order lines
- Create putaway reservations for individual order lines

The screenshot shows a computer window titled "[46130] - Online Reservations". The menu bar includes Functions, Options, Tools, and Help. The main area has fields for Branch/Plant (27), Status Code (220 Thru 999), Order Number (2028), and Skip to Line Number. A table lists one item: Line 1.000, Item M001, Location (empty), Reserved (empty), and UM (DZ). The bottom bar includes buttons for checkmarks, delete, and various functions, along with keys for Opt, F6, F24, and MW.

Line	Item	Location	Reserved	UM
1.000	M001			DZ

### What You Should Know About

**Canceling putaway reservations**

You can use Online Reservations to cancel reservations. You cancel reservations to make reserved locations available again.

**Creating online reservations**

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 still can create reservations manually for any remaining lines on the purchase order.
- If the 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.

---

### ► **To create putaway reservations for all order lines**

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#### On Online Reservations

1. Complete the following fields:
  - Branch/Plant
  - Order Number
  - Order Type
2. Choose Suggest All to create reservations.

---

### ► **To create putaway reservations for individual order lines**

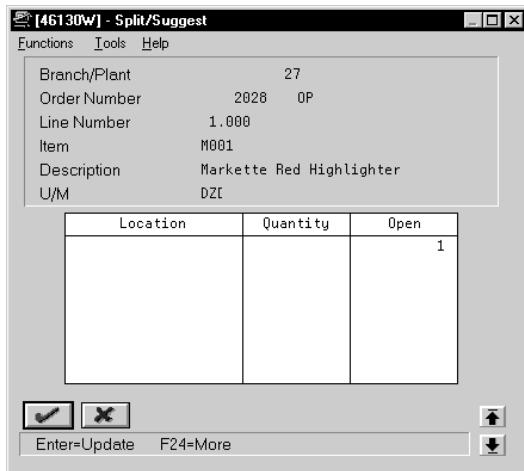
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#### On Online Reservations

1. Complete the following fields:
  - Branch/Plant
  - Order Number
  - Order Type
  - Location
  - Quantity Reserved

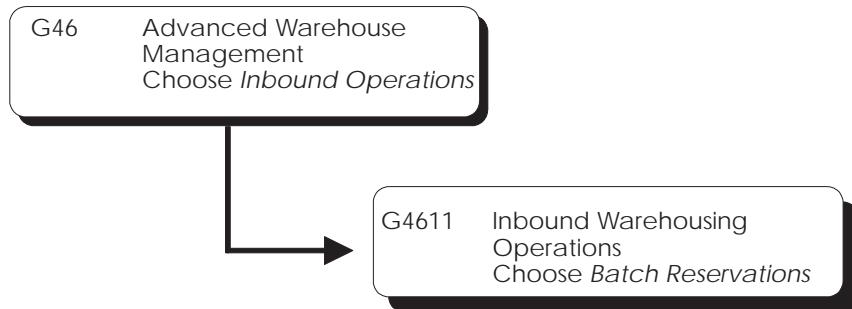
2. To split suggestions for individual purchase order line reservations, access Split/Suggest.

The system displays Split/Suggest with the system's suggestion(s) for a reservation location and quantity.



3. On Split/Suggest, modify the system's information with the appropriate information in the following fields:
  - Location
  - Quantity

### Creating Putaway Reservations by Batch



You can reduce the system processing time required for creating reservations by creating them in a batch for many purchase orders at one time. This eliminates the need to enter reservations one order at a time.

When you run the Batch Reservations program, the system can:

- Create putaway reservations

- Create putaway location suggestions
- Print movement tags and slips
- Print audit reports

You control which functions the system performs by setting processing options in the Batch Putaway Reservations program.

Batch Reservations is a DREAM Writer program.

46475	J.D. Edwards & Company Putaway Audit Report										Page No. . . . 2
	. . . . Request . . . .										Date - . . . . 5/13/96
Type	Request Number	Sequence	Item Number	Location	Attempted	Suggested	Pr	L1	Usg	UM	UM Code
Putaway	1001	.	.	1 .B .2	10	10	EA	EA	3591	Excluded inactive locations	

## Processing Options for Batch Reservations

### Update Option:

1. Enter a '1' to re-suggest location reservations for selected purchase order lines. If blank, only lines without open reservations will be suggested.

### Move Tag Options:

Enter a '1' to:

2. Print move tags.
3. Print bar coded information.
4. Print the U/M structure.

5. Enter the item/location quantity to be printed on the tags:

' ' = Do not print a quantity.  
'1' = On-hand quantity.  
'2' = On-hand + inbound - outbound - committed.

6. Enter the number of duplicate copies to print for each tag. \_\_\_\_\_

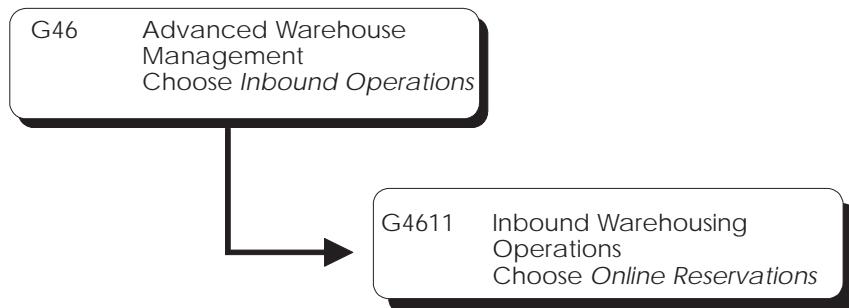
7. Enter the DREAM Writer version to be used for the desired printer overrides. If blank, XJDE0001 is used (See Form ID P46473).

**Audit Control:**

7. Enter a '1' to generate the audit Report, a '2' to generate the Audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated.

8. Enter the DREAM Writer version of the Selection Audit report to use. If blank, XJDE0001 is used. (See form ID P46475.)

### Creating Alternate Putaway Reservations



You can create alternate putaway reservations if you do not agree with the system's suggestions for reserved putaway locations.

#### ► **To create alternate putaway reservations**

---

On Online Reservations

1. Complete the following fields:

- Branch/Plant
- Order Number
- Order Type
- Location

- Quantity Reserved

2. Choose Suggest for the purchase order line for which to suggest reservation locations.

The system displays Split/Suggest with the suggested reserved Location and Quantity for the purchase order line.

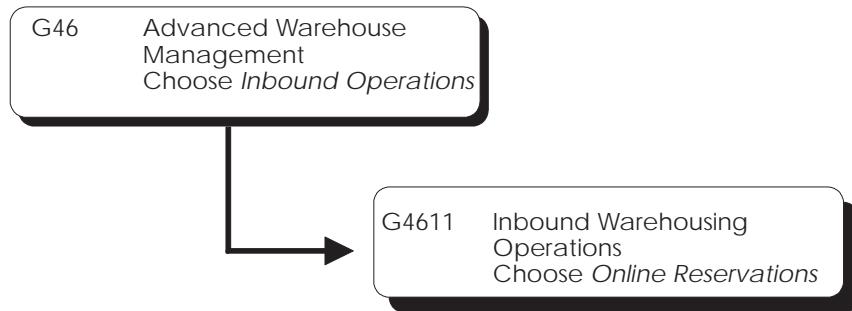
3. To accept the new reservation, press Enter.

### What You Should Know About

#### Excluding locations

As you create alternate suggestions for reserved locations, the system displays new locations for possible reservations, but does not display the previously reserved location.

## Changing Existing Putaway Reservations



You can change a reserved putaway location to a different location. You would do this if you wanted to change the current reserved location to a location that is more convenient for your employees or is closer to locations containing other similar items.

You can:

- Change existing reservations by splitting order lines
- Change existing reservations manually

### ► **To change existing reservations by splitting order lines**

On Online Reservations

1. Complete the following fields:
  - Branch/Plant
  - Order Number
  - Order Type
  - Location
  - Quantity Reserved
2. Choose Split for each purchase order line that you want to split into multiple location reservations.
3. Complete the following fields for each location into which you want to split the purchase order line:
  - Location
  - Quantity

### ► **To change existing reservations manually**

---

#### On Online Reservations

1. Complete the following fields:
  - Branch/Plant
  - Order Number
  - Order Type
  - Location
  - Quantity Reserved
2. Replace the existing information with your own information in the following fields:
  - Location
  - Quantity

### What You Should Know About

#### **Quantity checking**

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.

# Work with Putaway Suggestions

---

## Working with Putaway Suggestions

After you create putaway requests, you create putaway suggestions to move the items to warehouse locations.

Complete the following tasks:

- Create putaway suggestions
- Confirm putaway suggestions

### Before You Begin

- 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

## Creating Putaway Suggestions

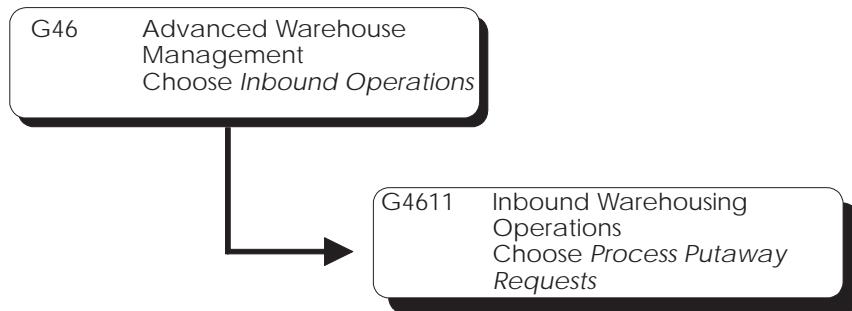
After you create putaway requests, you create putaway suggestions to move items into storage locations.

You can create putaway suggestions by batch (with the Process Putaway Requests program), or interactively (using the subsystem to create suggestions, confirm suggestions, and print move tags and audit reports). You can create alternate putaway suggestions by changing the movement instruction table and running the Resuggest Putaway Requests program to replace existing suggestions with which you do not agree.

Complete the following tasks:

- Create putaway suggestions by batch
- Create putaway suggestions interactively
- Create alternate putaway suggestions

### Creating Putaway Suggestions by Batch



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 purchase orders by creating putaway suggestions several times each day. You typically run batch programs during off-peak hours, when more system resources are available.

When you run the Process Putaway Requests program, the system can:

- Select all outstanding putaway requests
- Update each request's status in the Warehouse Requests table (F4600)
- Create putaway location 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 Process Putaway Requests program.

Process Putaway Requests is a DREAM Writer program.

46475	J.D. Edwards & Company Putaway Audit Report						Page No. . . . 19	
							Date - . . . 14.05.96	
Type	Request Number	Sequence	Item Number	Location	Attempted	Quantity . . . Suggested	Pr L1 Usg UM UM Code	Description
3216	1,000	M002		3.E .2	3600		EA CA 3544	Zone does not match
				3.E .3	3600		EA CA 3544	Zone does not match
				5.A .2	3600		EA CA 3226	Cannot mix this item
				5.A .3	3600		EA CA 3226	Cannot mix this item
				5.A .4	3600		EA CA 3226	Cannot mix this item
				5.A .5	3600		EA CA 3226	Cannot mix this item
				4.A .5	3600		EA CA 3226	Cannot mix this item
				4.A .4	3600		EA CA 3226	Cannot mix this item
				4.A .3	3600		EA CA 3226	Cannot mix this item
				4.A .2	3600		EA CA 3226	Cannot mix this item
				4.A .1	3600		EA CA 3226	Cannot mix this item
				4.B .1	3600		EA CA 3226	Cannot mix this item
				4.B .2	3600		EA CA 3226	Cannot mix this item
				4.B .3	3600	720	EA CA 3213	Used - Random Location
				4.B .4	2880		576	EA CA 3213 Used - Random Location

## Processing Options for Process Putaway Requests

### Task And Trip Assignment:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned.
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471).

### Audit Control:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.)

### Confirmation Control:

5. Enter a '1' to automatically confirm suggestions.
6. Enter the override next status for the confirmed sales order lines.

(Pick Processing Only).

**Resuggestions:**

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed.

---

**Replenishment Control:**

8. Enter the method to use for replenishment quantities. If blank, method '2' is used.

---

'1' = Economic Replenishment.  
The quantity to replenish  
is retrieved from the fixed  
location definition.

'2' = Maximum Replenishment.  
The quantity to replenish  
is the quantity which would  
fill the location.

**Replenishment Control: (Cont)**

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used.  
(See form ID P46471)

---

## Creating Putaway Suggestions Interactively

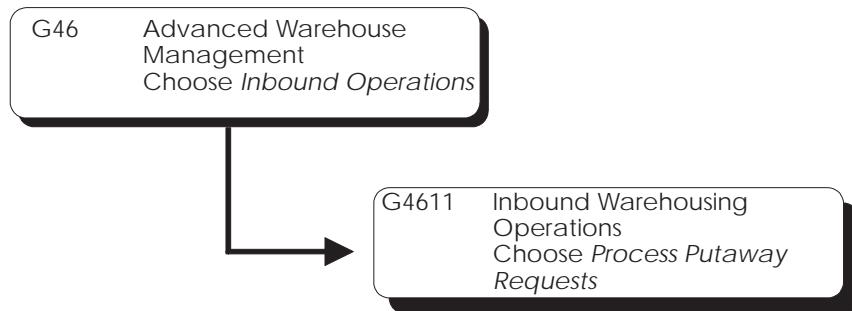
You create putaway suggestions interactively to process putaway requests as you create them. You do this by setting a processing option in Enter Receipts by PO or Item to create a putaway request and process it using the subsystem. As soon as you create a putaway request, the subsystem can process it immediately. When you use this method, the system can:

- Create putaway suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm putaway suggestions

### Before You Begin

Before you can use the subsystem, you must first set it up using the Advanced Warehouse and Technical Operations menu. J.D. Edwards provides a predefined subsystem. However, you can create different versions or change the processing options in individual programs controlled by the subsystem. You define how the system creates suggestions, confirms suggestions, and prints movement documents by changing the processing options in the programs.

## Creating 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 the Resuggest Putaway Requests 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 suggestion(s).

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, the Resuggest Putaway Requests program suggests the same locations as in the previous suggestions.

When you run the Resuggest Putaway Requests program, the system can:

- Delete existing putaway suggestions
- Reset each request's status in the Warehouse Requests table (F4600)
- Create alternate putaway location 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 Resuggest Putaway Requests program.

Resuggest Putaway Requests is a DREAM Writer program.

J.D. Edwards & Company Putaway Audit Report							Page No. . . . 20 Date - . . . 14.05.96 .
. . . Request . . . .			Location	Quantity . . .	Pr L1 Usg	UM UM Code	Description
Type	Number	Sequence Item Number	Attempted	Suggested			
Putaway	3215	1,000 M001	4.B .4	6000	EA CA 3226	Cannot mix this item	
			4.B .5	6000	EA CA 3226	Cannot mix this item	
			5.B .1	6000	EA CA 3226	Cannot mix this item	
			5.B .2	6000	EA CA 3226	Cannot mix this item	
			5.B .3	6000	EA CA 3226	Cannot mix this item	
			5.B .4	6000	EA CA 3226	Cannot mix this item	
			5.B .5	6000	EA CA 3226	Cannot mix this item	
			5.C .5	6000	EA CA 3226	Cannot mix this item	
			5.C .4	6000	EA CA 3226	Cannot mix this item	
			5.C .3	6000	EA CA 3226	Cannot mix this item	
			5.C .2	6000	EA CA 3226	Cannot mix this item	
			5.C .1	6000	EA CA 3226	Cannot mix this item	
			4.C .5	6000	EA CA 3226	Cannot mix this item	
			4.C .4	6000	EA CA 3226	Cannot mix this item	
			4.C .3	6000	EA CA 3226	Cannot mix this item	
			4.C .2	6000	EA CA 3226	Cannot mix this item	
			4.C .1	6000	EA CA 3226	Cannot mix this item	
			4.D .1	6000	EA CA 3226	Cannot mix this item	
			4.D .2	6000	EA CA 3226	Cannot mix this item	
			4.D .3	6000	EA CA 3226	Cannot mix this item	
			4.D .4	6000	EA CA 3226	Cannot mix this item	
			4.D .5	6000	EA CA 3226	Cannot mix this item	

## Processing Options for Resuggest Putaway Requests

### Task And Trip Assignment:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. \_\_\_\_\_
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471). \_\_\_\_\_

### Audit Control:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated. \_\_\_\_\_
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.) \_\_\_\_\_

### Confirmation Control:

5. Enter a '1' to automatically confirm suggestions. \_\_\_\_\_
6. Enter the override next status for the confirmed sales order lines. \_\_\_\_\_

(Pick Processing Only).

**Resuggestions:**

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed.

**Replenishment Control:**

8. Enter the method to use for replenishment quantities. If blank, method '2' is used.

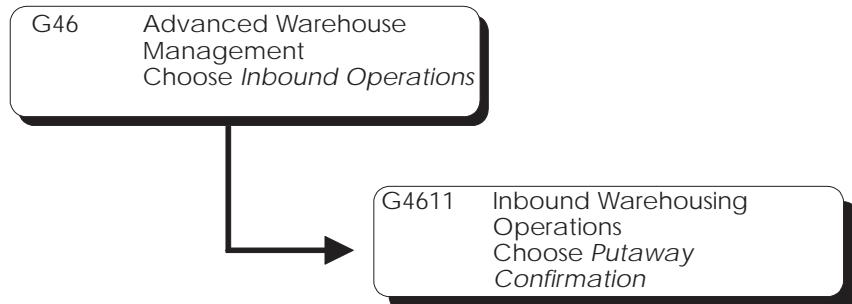
'1' = Economic Replenishment.  
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.  
The quantity to replenish is the quantity which would fill the location.

**Replenishment Control: (Cont)**

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used.  
(See form ID P46471)

## Confirming Putaway Suggestions



If you agree with the system's suggestions for putaway locations, you confirm them using Putaway Confirmation. If you do not agree, you can create alternate suggestions or cancel the existing suggestions. You can also change suggested locations or split a suggestion for one location into two locations.

During confirmation, you can also confirm with variance. When you confirm with variance, you confirm that you are putting away a quantity that is less than the original quantity. The system moves the remaining unconfirmed quantity to the variance location you defined in the item profile. For example, if your warehouse employees damaged part of the incoming shipment, you would send the damaged items to the variance location.

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 (F41021)
- Location Detail Information (F4602)
- Item Ledger (F4111)
- Warehouse Requests (F4600)
- Warehouse Suggestions (F4611)
- Task Header (F4601)

Complete the following tasks:

- Confirm putaway suggestions
- Change or split putaway suggestions

**[4617] - Putaway Confirmation**

Functions Options Tools Help

Task Number		Branch/Plant	27			
Order Number		Phase				
Item Number		Status	340			
* Suggestion Printed						
0	Task	Trip	Item	Quantity	UM	To Location
1441	1.000	M001		4836	EA	0. .
Branch/Plant		27		Fr Stg Unit #		
Order Number		2029	OP	To Stg Unit #		
Line Number		1.000		Lot		
From Location		R. .		Lot Grade		
Status		340 Suggestion Printed		Lot Potency		
1	PL /	17	CA /	403	DZ /	4836 EA
Cont	PAL1	Cont	CTN3	Cont	CTN3	Cont
1441	2.000	M001		768	EA	5.R .1
Branch/Plant		27		Fr Stg Unit #		
Order Number		2029	OP	To Stg Unit #		
Line Number		1.000		Lot		
From Location		R. .		Lot Grade		
Status		340 Suggestion Printed		Lot Potency		
3	CA /	64	DZ /	768	EA /	
Cont	CTN3	Cont	CTN3	Cont	CTN3	

Opt: 1=Confirm 3=Change/Split 5=Reprint 9=Cancel F24=More MW

► **To confirm putaway suggestions**

---

On Putaway Confirmation

1. Complete the following fields:
  - Branch/Plant
  - Task Number
  - Order Number
  - Document Type
  - Item Number
2. To confirm the suggested locations and quantities, choose Confirm.

► **To change or split putaway suggestions**

---

On Putaway Confirmation

1. Complete the following fields:
  - Branch/Plant
  - Task Number
  - Order Number
  - Document Type
  - Item Number
2. To split or change a putaway suggestion, access Change/Split Suggestion.

**[4617W] - Change/Split Suggestion**

Task Number		1441	Br/Pl	27																								
Item Number	1.000																											
Description	Markette Red Highlighter																											
Suggested Qty	4836	ER																										
Open Request Qty	12000	ER																										
<table border="1"> <thead> <tr> <th></th> <th>From Location</th> <th>To Location</th> <th>Rsn</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>4836 ER R. .</td> <td>0. .</td> <td></td> </tr> <tr> <td></td> <td>ER R. .</td> <td></td> <td></td> </tr> </tbody> </table>						From Location	To Location	Rsn	0	4836 ER R. .	0. .			ER R. .														
	From Location	To Location	Rsn																									
0	4836 ER R. .	0. .																										
	ER R. .																											
	ER R. .																											
	ER R. .																											
	ER R. .																											
<input checked="" type="checkbox"/> <input type="checkbox"/> Opt: 1=Confirm 2=Conf/w/Var 9=Cancel F3=Exit F8=Refresh F24=More																												

3. On Change/Split Suggestion, complete the following fields for each location into which you want to split or change the suggestion:
  - Quantity
  - To Location
  - Reason
4. To confirm a smaller quantity than the suggested quantity and move the remainder to the designated variance location, choose Confirm with Variance.
5. To confirm the suggested locations and quantities, choose Confirm.

Field	Explanation
Phase	A number that identifies which phase of 2-phase movement suggestions that the system displays.  Valid numbers are: 1      Display phase 1 of the movement suggestions 2      Display phase 2 of the movement suggestions blank   Do not display 2-phase movement suggestions
Task Number	A unique number assigned to every putaway request that is created by a receipt.
Reason Code	Reason representing the change or override of a warehouse management suggestion.

### What You Should Know About

<b>Creating new suggestions for different quantities</b>	If you confirm a quantity less than the original quantity, and you do not choose Confirm with Variance to move the remainder to the variance location, the system creates a new suggestion for the remaining quantity. The remaining quantity stays open on the original suggestion so you can confirm it separately.
<b>Canceling putaway suggestions</b>	You can use Putaway Confirmation to cancel putaway suggestions. You cancel suggestions to stop further processing and putaway.

# Picking

## Objectives

- To create pick requests
- To locate existing pick requests
- To create suggestions for pick requests
- To confirm suggestions for pick requests
- To confirm shipment of items

## About Picking

You use picking to remove items from stock and move them to the shipping dock to be shipped. The shipping dock is usually the default location for outgoing items.

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 you need to ship and then create suggestions to pick from those locations.

You can use the locations that the system suggests for you or use different locations. You then confirm your chosen locations to move the items from the 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.

The picking process includes:

- Working with pick requests
- Working with pick suggestions

## See Also

- *Appendix B — Manufacturing Information* for information on creating pick requests through manufacturing systems





# Work with Pick Requests

---

## Working with 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
- 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.

Complete the following tasks:

- Create pick requests
- Locate existing pick requests

### Before You Begin

- Verify that you have set up inclusion rules on Branch/Plant Constants – Pg 2 to select the steps in the order activity rules for the order type that you want to process. Only the steps that you select will generate pick requests.

### See Also

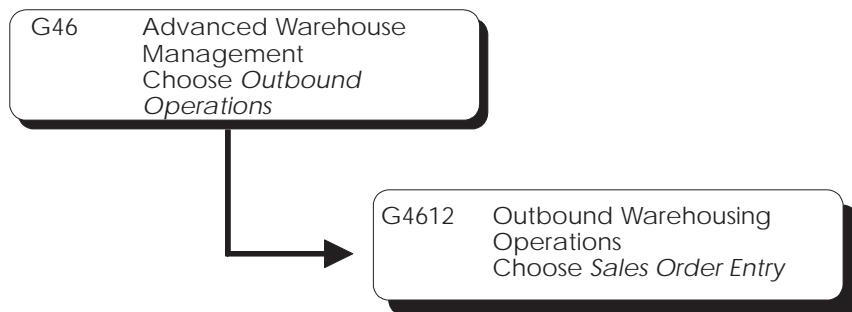
- *Appendix B — Manufacturing Information* for information about creating pick requests through manufacturing processes

### Creating Pick Requests

You create pick requests to generate suggestions for picking locations. You can:

- Create pick requests interactively
- Create pick requests by batch

#### Creating Pick Requests Interactively



After you enter a sales order, you can create a pick request to fill the sales order. This is the most common method of creating pick requests. (You can also create pick requests by batch.) You use these pick requests to create suggestions for picking locations.

You set the processing options for Sales Order Entry (or a manufacturing completions program) to determine whether you:

- Create requests only
- Create requests and process them using the subsystem
- Do not create requests

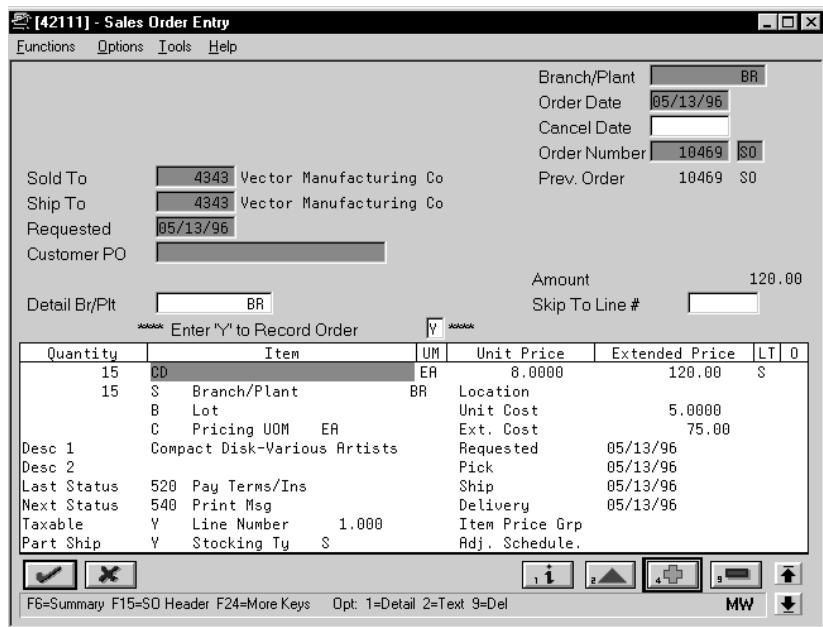
If you create pick requests only, you must create and confirm location suggestions separately.

If you create and process pick requests using the subsystem, the subsystem creates pick suggestions. The subsystem also can confirm the pick suggestions, create tasks and trips, and print movement tags, slips, and audit reports (depending on how you set the processing options in each program).

If you do not create pick requests through Sales Order Entry, you must use the Batch Pick program to create pick requests.

► **To create pick requests interactively**

On Sales Order Entry



1. Complete the following fields:

- Sold To
- Ship To
- Quantity
- Item
- Unit Of Measure
- Unit Price

The system automatically inputs the order number and prompts you to confirm the order.

2. Complete the following field:

- Update

Field	Explanation
Sold To	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, special mailing addresses, and so on.

Field	Explanation
Unit Price	<p>The list or base price to be charged for one unit of this item. In sales order entry, all prices must be set up in the Base Price table (F4106).</p> <p>..... <i>Form-specific information</i> .....</p> <p>If this item is not set up on the Basic Item Master Data form, you must type a price in this field. This price overrides all other prices.</p> <p>NOTE: If you enter the extended price, the system can calculate the unit price.</p>
Amount – Extended Price	The number of units multiplied by the unit price.
Update (Y/N)	When you perform an action that requires the system to update a file, the system asks this question before it updates the file. If you enter Y, you indicate the data is valid for update and subsequent processing. If you enter N or leave this field blank, you indicate that you want the system to redisplay the screen so you can correct or modify the data.

## Processing Options for Sales Order Entry

### Sales Order Default Values:

1. Document Type	(Required)	_____
2. Line Type	(Optional)	_____
3. Beginning Status	(Optional)	_____
4. Override Next Status	(Optional)	_____
5. Unit of Measure	(Optional)	_____
6. Line Number Increment	(Optional)	_____
7. Reason Code	(Optional)	_____

### Unit Of Measure Default Values:

8. Enter '1' to use the Pricing UOM as the default Transaction UOM. If left blank, the Primary UOM will be used instead.	_____
--	-------

### Work Order Default Values:

9. Document Type (default is 'WO')	_____
10. Beginning Status	_____
11. Held Status	_____
12. Cost Center	_____
13. Change Status	_____

### Order Duplication Default Values:

14. Document Type	_____
15. Beginning Status	_____
16. Enter text duplication selection '1' to copy line text '2' to copy line and order text '3' to copy order text	_____

### Address Book Default Values:

17. Enter a '1' to default the branch from the Address Book. If left Blank, it will default from the	_____
--	-------

user default location.

18. Enter a '1' to default the address lines when the address number is changed. If left blank, the current address will remain.

---

**Download Header Information:**

19. Enter '1' to automatically load header values to the detail lines after a change. If left blank, it must be done manually.

---

**Prompting Control:**

20. Enter the Screen Format:

1 = Quantity, Item, Price  
2 = Quantity, Item, Description  
3 = Item, Quantity, Price  
(If left blank, format 1 is used.)

---

Enter a '1' to:

21. Display Headings first.  
22. Be prompted to accept the order.

---

**Note: Two-Cycle Order Entry Is Not**  
recommended for configured items.

23. Allow the addition of a Customer Master record, if not set up.  
24. Load Online Invoice information before the order is accepted.  
25. Enter which Item Search screen is to be used to return items:

---

1 = Item Search window allowing the return of multiple items  
2 = Full Item Search screen with Query capabilities

---

(If left blank, the Item Search window allowing the return of a single item will be used.)

**Order Hold Codes:**

26. Customer Credit Checking  
27. Order Margin Checking  
28. Order Line Margin Checking  
29. Order Minimum Value Checking  
30. Order Maximum Value Checking  
31. Partial Order Hold  
32. Product Allocation Hold

---

**Line Control Status:**

33. Enter the next status code beyond which a detail line cannot be changed. If left blank, no restriction will be put on the changing of a line.

---

**Field Display Control:**

Enter '1' to protect or '2' to suppress:  
34. Cost Fields  
35. Price Fields

---

Enter '1' to protect the following:  
36. Status Codes  
37. Price adjustment driver fields

---

Enter a '1' to suppress the following:

38. Closed Detail Lines \_\_\_\_\_
39. Credit Card Information \_\_\_\_\_
40. Freight and Carrier Information \_\_\_\_\_
41. Commission Information \_\_\_\_\_

**Credit Order Processing:**

42. Enter the status code to select when retrieving credit orders. \_\_\_\_\_
43. Enter '1' if the previous status is the last status. If left blank it will be the Next Status. \_\_\_\_\_

**Cross Reference Information:**

44. Enter the Cross Reference Type for:
  - Substitute Items \_\_\_\_\_
  - Associated Items \_\_\_\_\_
  - Replacement Items \_\_\_\_\_
45. Enter '1' to use the substitute item's Unit Price. If left blank, the original item's price will be used to order the substitutes. \_\_\_\_\_

**Kit Processing:**

46. Enter '1' to prevent Kit Components from being written. If left blank, they will be added to the sales detail file. \_\_\_\_\_
47. Enter '1' to suppress Kit Component lines. \_\_\_\_\_
48. Enter the version of Kit Inquiry to call. If left blank, version ZJDE0001 will be called. \_\_\_\_\_
49. Enter '1' to suppress availability information in the Kit Window. \_\_\_\_\_

**Availability Checking:**

50. Enter '1' to be notified of an automatic backorder or cancel. Enter '2' to be notified but not create the backorder or cancel. Enter '3' to create the backorder or cancel automatically and update the order without issuing the warning. \_\_\_\_\_

If left blank, no availability checking will be done.

**Commitment Control**

51. Enter '1' for commitment to Other Quantity 1 or '2' for commitment to Other Quantity 2. This option is typically used in conjunction with a Blanket or Quote Order. If this option is used, the commitment preference will be ignored. \_\_\_\_\_

**Automatic Processing:**

52. Enter '1' to automatically display the Supply and Demand screen when a new sales detail line is backordered. \_\_\_\_\_
53. Enter '1' to print pick slips or a \_\_\_\_\_

'2' to print invoices through the subsystem. Enter '3' for on-line commitment or a '4' for subsystem commitment.

54. Enter '1' for auto order repricing

---

**Dream Writer Versions:**

Enter the version for each program.  
If left blank, ZJDE0001 will be used:

55. Pick Slip Print	(P42520)	_____
56. Supply and Demand	(P4021)	_____
57. Std Order/Basket Reprice	(P421301)	_____
or Adv Order/Basket Reprice	(P42750)	_____
58. Customer Service	(P42045)	_____
59. Online Invoice	(P42230)	_____
60. Preference Profile	(P40400)	_____
61. Check Price (Advanced)	(P40721)	_____
62. Customer Master	(P01053)	_____
63. SMS Rate & Route server	PSMR9100	_____

**Configurator Processing:**

64. Enter one of the following for the mode of Specification Entry.  
If left blank, '2' will be used:  
'1' = Text Mode  
'2' = Assisted Mode  
'3' = Assisted Prompt Mode

**Transfer Price Update:**

65. Enter the order type(s) that the system will use to invoke inter-branch updates. To specify more than one order type, type them one after the other along this field.	_____
66. Enter the transfer pricing method to be used. Default method is 1. 1 = Branch cost mark-up 2 = Transfer pricing	_____
67. Enter '1' to allow inter-branch invoicing. If left blank, no inter-branch invoice can be run.	_____

**Warehouse Processing:**

68. Enter the request processing mode: ' ' = No pick requests '1' = Generate requests only '2' = Generate requests and process using the subsystem	_____
69. If processing pick requests using the subsystem, enter the DREAM Writer version to use. If blank, XJDE0002 is used. (See Form ID P46171.)	_____
70. Enter an override next status for sales order lines for which requests have been generated.	_____

**Order Template Processing:**

71. Enter a '1' to use the Sold-to address number for order	_____
---	-------

templates, or a '2' to use the Ship-to address number. If left blank, no automatic order template processing will be performed.

**Blanket/Quote Processing:**

72. Enter a '1' for automatic access to the blanket/quote release processing. If left blank, no automatic blanket/quote release processing will be performed.

**Preference Profile Processing:**

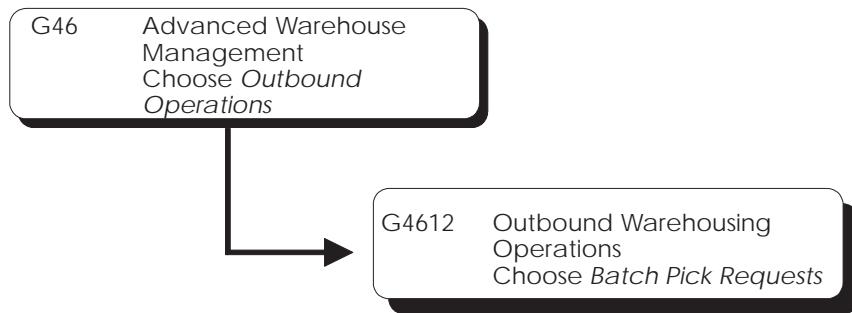
73. Enter a '1' to use preference profile defaults. If left blank, no preference profile information will be defaulted.

74. Enter a '1' to use the Inventory Commitment Preference to source from multiple branches or to view grade or potent items in the commitment window.

**Currency Processing:**

75. Enter the tolerance limit percentage to warn you of currency rate changes. A 15.0 indicates a warning if the rate is 15 percent greater or less than the current rate.

## Creating Pick Requests by Batch



If you don't create pick requests during sales order entry, you must create pick requests by batch. Run the Batch Pick Requests program to select all orders at a desired status 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 Pick Requests program, the system can:

- Select all sales orders at a status that you define through the Data Selection processing options

- Create pick requests
- Update each request's status in the Warehouse Requests table (F4600)

Batch Pick Requests is a DREAM Writer program.

### What You Should Know About

#### Changing sales order information

You cannot make changes to the order after you begin processing it using the Advanced Warehouse Management system.

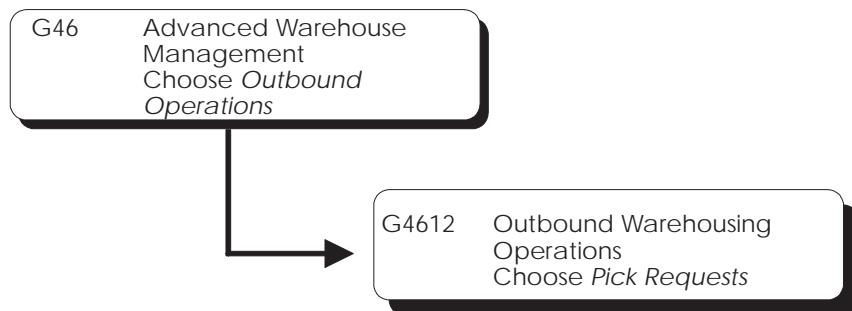
### Processing Options for Batch Pick Requests

#### Default Processing:

1. Enter the override next status to use.

---

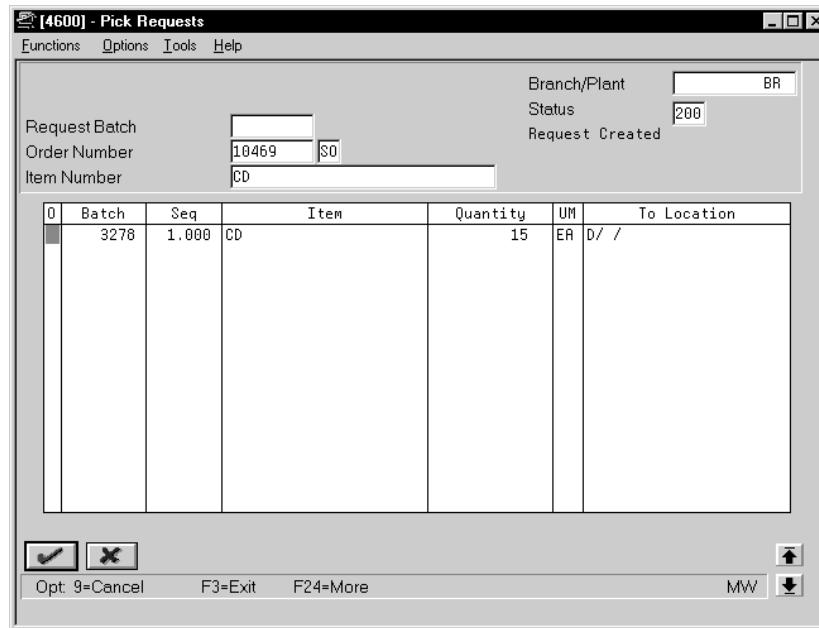
### Locating Existing Pick Requests



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.

#### ► To locate existing pick requests

On Pick Requests



1. Complete the following field:
  - Branch/Plant
2. Complete one or more of the following optional fields:
  - Status
  - Request Batch
  - Order Number
  - Document Type
  - Item Number

## What You Should Know About

### **Canceling pick requests**

You can use Pick Requests to cancel pick requests. You cancel requests to stop further processing and picking. For example, if the customer cancels the sales order, or the items are damaged, you would cancel the pick request.

You must first cancel any existing pick suggestions for the request before you cancel the pick request.

# Work with Pick Suggestions

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## Working with Pick Suggestions

After you create pick requests, you create pick suggestions to pick and ship items.

Complete the following tasks:

- Create pick suggestions
- Confirm pick suggestions
- Confirm shipment

### Before You Begin

- 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

## Creating Pick Suggestions

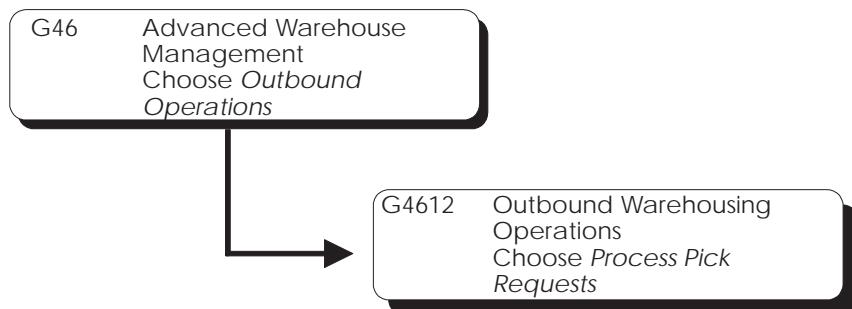
After you create pick requests, you create pick suggestions to move items from storage locations and to ship them.

You can create pick suggestions by batch (with the Process Pick Requests program) or interactively (using the subsystem to create suggestions, confirm suggestions, and print move tags and audit reports). You can create alternate pick suggestions by using the Resuggest Pick Requests program to replace existing suggestions with which you do not agree.

Complete the following tasks:

- Create pick suggestions by batch
- Create pick suggestions interactively
- Create alternate pick suggestions

### Creating Pick Suggestions by Batch



You normally create pick suggestions by batch to process pick requests and move inventory on a regular basis. You can compensate for a large volume of sales orders by creating pick suggestions several times each day. You typically run batch programs during off-peak hours, when more system resources are available.

When you run the Process Pick Requests program, the system can:

- Select all outstanding pick requests
- Update each request's status in the Warehouse Requests table (F4600)
- Create picking location suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm pick suggestions

You control which functions the system performs by setting processing options in the Process Pick Requests program.

Process Pick Requests is a DREAM Writer program.

J.D. Edwards & Company Picking Audit Report							Page No. . . . . 2	
. . . Request . . . . .							Date - . . . 14.05.96 .	
Type	Number	Sequence	Item Number	Location	Attempted	Suggested	UM UM Code	Description
Picking	3217	1,000	M001	.	600		EA	PL 3586 Insufficient qty for UOM.
				.	600		EA	PL 3583 Qty insufficient for instr.
				4.B .2	600	576	EA CA 3595	Used as random location.
				10.C .	24	24	EA DZ 3594	Used as fixed location.

## What You Should Know About

### Using automatic replenishment

As you create suggestions for picking locations (and you are using automatic replenishment), the system runs the appropriate programs to create and process replenishment requests for depleted picking locations.

## Processing Options for Process Pick Requests

### Task And Trip Assignment:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. \_\_\_\_\_
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471). \_\_\_\_\_

### Audit Control:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated \_\_\_\_\_

4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.)

**Confirmation Control:**

5. Enter a '1' to automatically confirm suggestions.

6. Enter the override next status for the confirmed sales order lines. (Pick Processing Only).

**Resuggestions:**

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed.

**Replenishment Control:**

8. Enter the method to use for replenishment quantities. If blank, method '2' is used.

'1' = Economic Replenishment.  
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.  
The quantity to replenish is the quantity which would fill the location.

**Replenishment Control: (Cont)**

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used. (See form ID P46471)

### Creating Pick Suggestions Interactively

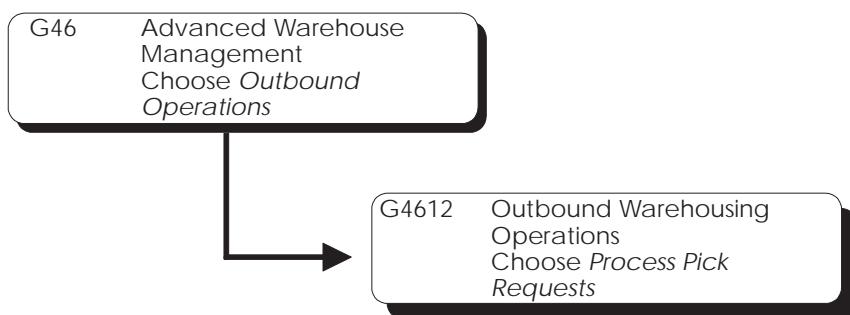
You create pick suggestions interactively to process pick requests as you create them. You do this by setting a processing option in the Sales Order Entry program to create a pick request and process it using the subsystem. As soon as you create a pick request, the subsystem can process it immediately. When you use this method, the system can:

- Create pick suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm pick suggestions

## Before You Begin

- ❑ Before you can use the subsystem, you must first set it up using the Advanced Warehouse and Technical Operations menu. J.D. Edwards provides a predefined subsystem. However, you can create different versions or change the processing options in individual programs controlled by the subsystem. You define how the system creates suggestions, confirms suggestions, and prints movement documents by changing the processing options in the programs.

## Creating 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 the Resuggest Pick Requests 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 suggestion(s).

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 picking instructions table. 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 Resuggest Pick Requests program suggests the same locations as in the previous suggestions.

When you run the Resuggest Pick Requests program, the system can:

- Delete existing pick suggestions
- Reset each request's status in the Warehouse Requests table (F4600)
- Create alternate picking location suggestions
- Assign tasks and trips
- Print movement tags and slips

- Print audit reports
- Confirm pick suggestions

You control which functions the system performs by setting processing options in the Resuggest Pick Requests program.

Resuggest Pick Requests is a DREAM Writer program.

J.D. Edwards & Company Picking Audit Report								Page No. . . . .	2
. . . Request . . . .								Date - . . .	14.05.96 .
Type	Number	Sequence	Item Number	Location	Quantity . . .	Pr	L1	Usg	Description
Picking	3217	1,000	M001	.	600	EA	PL	3586	Insufficient qty for UOM.
				.	600	EA	PL	3583	Qty insufficient for instr.
				4.B .2	600	576	EA	CA 3595	Used as random location.
				10.C .	24	24	EA	DZ 3594	Used as fixed location.

### Processing Options for Resuggest Pick Requests

#### Task And Trip Assignment:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. \_\_\_\_\_
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471). \_\_\_\_\_

#### Audit Control:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated \_\_\_\_\_
4. Enter the DREAM Writer version of \_\_\_\_\_

the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.)

**Confirmation Control:**

5. Enter a '1' to automatically confirm suggestions. \_\_\_\_\_
6. Enter the override next status for the confirmed sales order lines. \_\_\_\_\_  
(Pick Processing Only).

**Resuggestions:**

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed. \_\_\_\_\_

**Replenishment Control:**

8. Enter the method to use for replenishment quantities. If blank, method '2' is used. \_\_\_\_\_

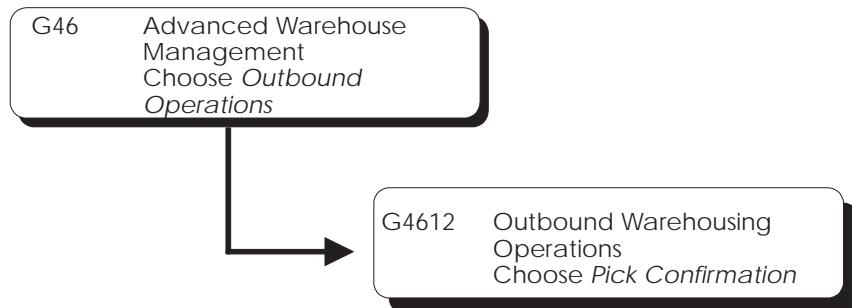
'1' = Economic Replenishment.  
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.  
The quantity to replenish is the quantity which would fill the location.

**Replenishment Control: (Cont)**

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used.  
(See form ID P46471) \_\_\_\_\_

## Confirming Pick Suggestions



If you agree with the system's suggestions for picking locations, you confirm them using Pick Confirmation. If you do not agree, you can create alternate

suggestions or cancel the existing suggestions. You can also change suggested locations or split a suggestion for one location into two locations.

During confirmation, you can also confirm with variance. When you confirm with variance, you confirm that you are picking a quantity that is less than the original quantity. The system moves the remaining unconfirmed quantity to the holding location that you defined in the item profile. For example, if your warehouse employees damaged part of the outgoing shipment, you would send the damaged items to the holding location.

During confirmation, you can also overpick. When you overpick, you confirm that you are picking a quantity that is greater than the original quantity. The system moves the excess quantity to the overflow location you defined in the item profile. For example, for an order of 20 items, it is easier to pick a case of 24 items and send 4 of them to the overflow location than it is to pick 20 eaches.

When you confirm suggestions for picking, you:

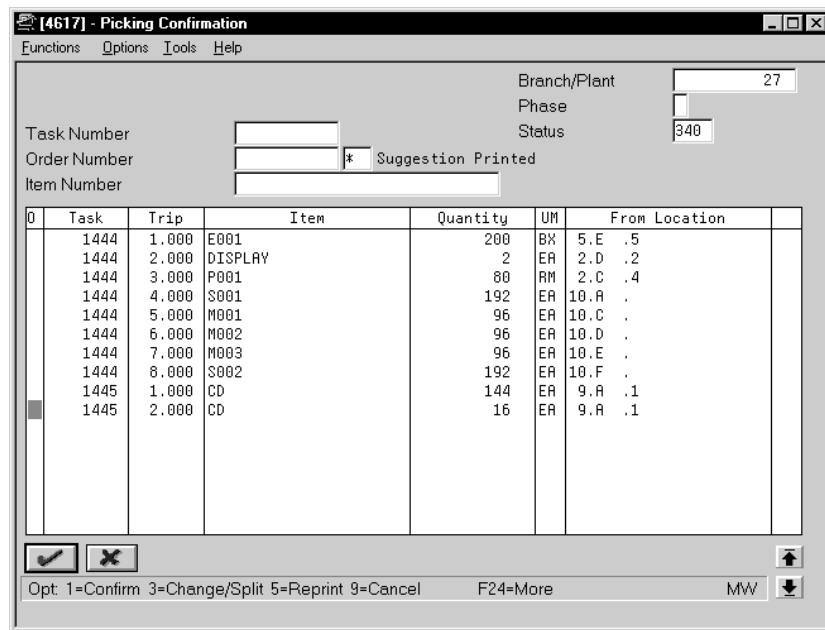
- Reduce on-hand inventory in the picking location
- Reverse the commitment of inventory in the picking location
- Increase on-hand inventory in the shipping location
- Commit inventory to the shipping location

Pick confirmation ensures that the system's records match actual inventory movements by updating the following tables:

- Item Location (F41021)
- Location Detail Information (F4602)
- Item Ledger (F4111)
- Warehouse Requests (F4600)
- Warehouse Suggestions (F4611)
- Task Header (F4601)

Complete the following tasks:

- Confirm pick suggestions
- Change or split pick suggestions



## ► To confirm pick suggestions

On Picking Confirmation

1. Complete the following fields:

- Branch/Plant
- Task Number
- Order Number
- Document Type
- Item Number

2. To confirm the suggested locations and quantities, choose Confirm.

## ► To change or split pick suggestions

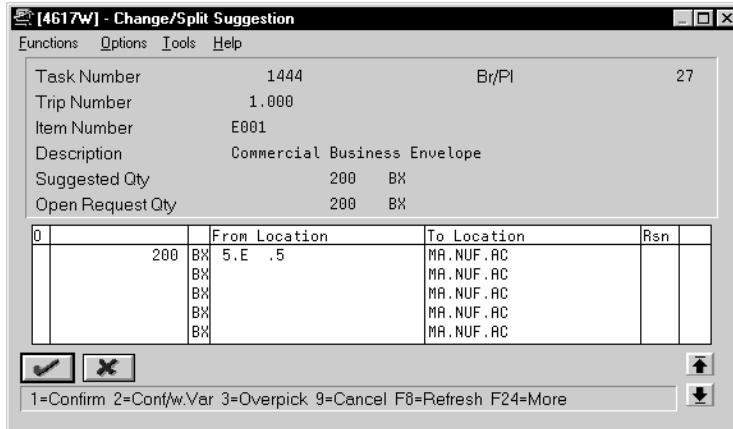
On Picking Confirmation

1. Complete the following fields:

- Branch/Plant
- Phase
- Task Number
- Order Number

- Document Type
- Item Number

2. To split or change a pick suggestion, access Change/Split Suggestion.



3. On Change/Split Suggestion, complete the following fields for each location into which you want to split or change the suggestion:

- Quantity
- From Location
- Reason

4. To confirm a smaller quantity than the suggested quantity and move the remainder to the designated holding location, choose Confirm with Variance.

5. To confirm a greater quantity than the suggested quantity and move the excess to the designated overflow location, choose Overpick.

6. To confirm the suggested locations and quantities, choose Confirm.

### What You Should Know About

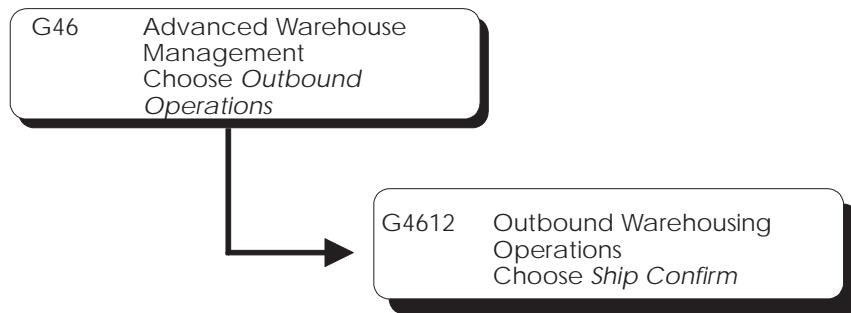
**Creating new suggestions for different quantities**

If you confirm a quantity less than the original quantity, and you do not choose Confirm with Variance to move the remainder to the holding location, the system creates a new suggestion for the remaining quantity. The remaining quantity stays open on the original suggestion so you can confirm it separately.

**Canceling pick suggestions**

You can use Pick Confirmation to cancel pick suggestions. You cancel suggestions to stop further processing and picking.

## Confirming Shipment



After you finish processing a pick request, you must indicate that the items have left the warehouse for shipment to the customer.



You must actually ship the item when you confirm shipment to avoid balance discrepancies between system inventory records and actual inventory.

**CAUTION:** You must actually ship the item when you confirm shipment, to avoid balance discrepancies between system inventory records and actual inventory.

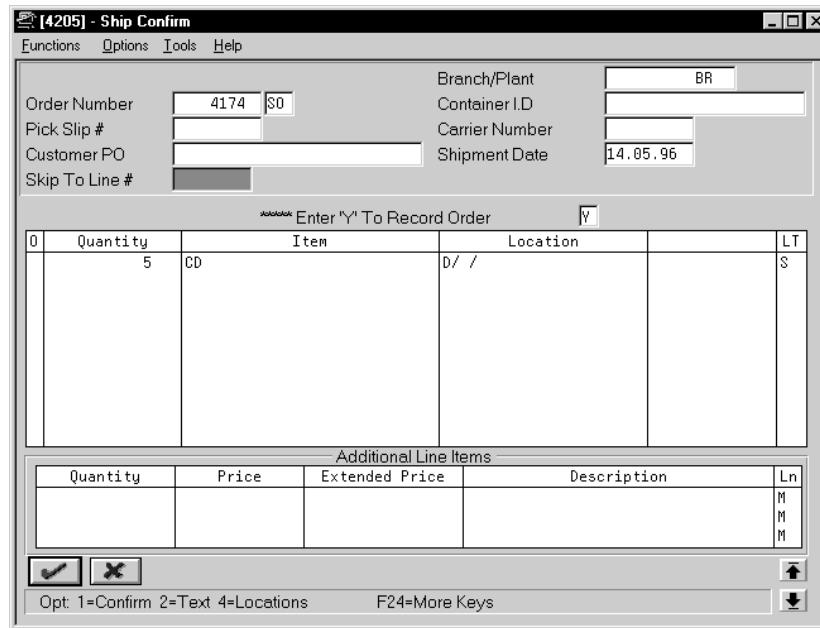
Shipment confirmation ensures that the system's records match actual inventory movements by updating the following tables:

- Item Location (F41021)
- Location Detail Information (F4602)

### ► **To confirm shipment**

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On Ship Confirm



1. Complete the following field:
  - Order Number
2. Choose Confirm for the order lines for which you want to confirm shipment.

The system prompts you to confirm shipment.

3. Complete the following field:
  - Update

## What You Should Know About

**Defining document types for shipment confirmation**

You must list the sales order document type (SO) in the user defined codes table 40/IU to permit the system to update the inventory records when you confirm shipment.

# Replenishment

## Objectives

- To create replenishment requests
- To locate existing replenishment requests
- To create suggestions for replenishment requests
- To confirm suggestions for replenishment requests

## About Replenishment

You use replenishment to refill fixed 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 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 or use different locations. You then confirm your chosen locations to move the items from the replenishment location to the picking location, and to update the system's inventory records.

The replenishment process includes:

- Working with replenishment requests
- Working with replenishment suggestions





# Work with Replenishment Requests

---

## Working with 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
- Unit of measure
- Quantity

The system uses this information to create suggestions for replenishment, based on the replenishment instruction tables you define.

Complete the following tasks:

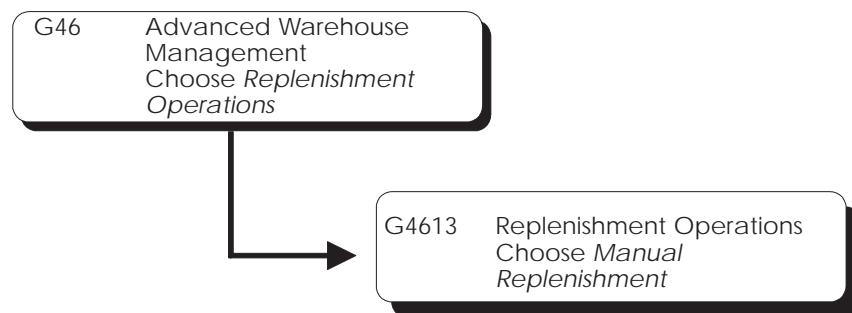
- Create replenishment requests
- Locate existing replenishment requests

## Creating Replenishment Requests

You create replenishment requests to generate suggestions for replenishment locations. You can:

- Create replenishment requests interactively
- Create replenishment requests by batch
- Create replenishment requests automatically

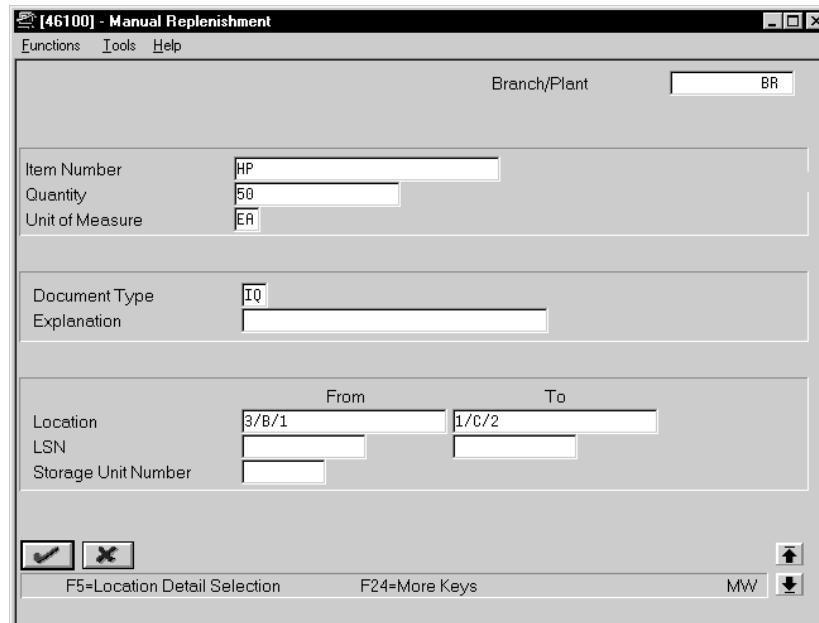
### Creating Replenishment Requests Interactively



You can replenish items in picking locations where the items have been depleted. You use Manual Replenishment to move a specific quantity of a specific item to another location. For example, you use Manual Replenishment to move a group of obsolete items to a specific location for recycling or disposal. You use these replenishment requests to create suggestions for replenishment locations. After you create replenishment requests interactively, you must create suggestions.

#### ► **To create replenishment requests interactively**

##### On Manual Replenishment



1. Complete the following fields:

- Branch/Plant

- Item Number
- Quantity
- Unit of Measure
- To Location

2. To specify the location from which to replenish items, complete the following field:

- From Location

3. Complete the following optional fields:

- From Lot Number
- To Lot Number
- From Storage Unit Number

---

<b>Field</b>	<b>Explanation</b>
To Location	<p>The storage location to which goods will be moved.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The system creates either a putaway or a replenishment request based on how you complete the From Location and the To Location fields:</p> <ul style="list-style-type: none"> <li>• Putaway Requests — To create a putaway request, enter a location in the From Location field.</li> <li>• Replenishment Requests — To create a replenishment request, enter a location in both the From Location and the To Location fields, or enter a location in only the To Location field.</li> </ul>
From Lot	<p>The lot number of the goods being putaway, picked or replenished.</p>
Lot – To	<p>The lot number to which goods will be added (merged). In most cases this will be the same as the from lot number.</p>
Storage Unit Number – From	<p>A number that uniquely identifies goods in specific location detail information. Each location detail will contain a storage unit number if the Item/UOM Profile for that item's level one unit of measure in the location detail (F4602) has license plate tracking turned on (P46011).</p> <p>..... <i>Form-specific information</i> .....</p> <p>The storage unit number being put away to or replenished from.</p>

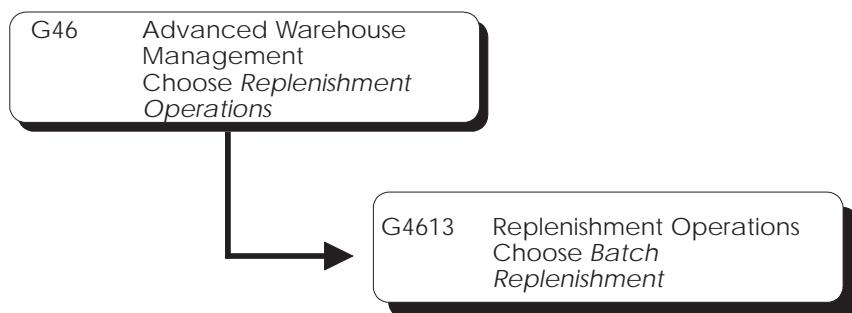
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### What You Should Know About

#### **Using inappropriate locations during manual replenishment**

Verify that the location to which you manually replenish is included in the picking instruction table. If it is not, the replenished items will remain in that location until you change the pick or replenishment instruction tables, or until you manually pick from the location.

### Creating Replenishment Requests by Batch



You create replenishment requests by batch under normal warehouse operating conditions. You select all depleted fixed picking locations and create replenishment requests for them. You typically run the batch program during off-peak hours, when more system resources are available.

Each picking location has two letdown points (the quantity level that determines whether the Batch Replenishment program creates a replenishment request):

- Normal replenishment (for example, 25 percent capacity)
- Minimum replenishment (for example, 10 percent capacity)

You can set the processing options for the Batch 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 any time you create pick suggestions.

You must also set the processing options in Batch Replenishment processing options to determine the quantity that the system should replenish, as follows:

- Economic (a specific quantity that you determine)
- Maximum (the quantity required to completely refill the location)

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 Batch 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 Batch Replenishment program.

Batch Replenishment is a DREAM Writer program.

46475 J.D. Edwards & Company Putaway Audit Report							Page No. . . . .	2	
. . . Request . . . . .			Location	Quantity	Pr	Ll	Usg	Date - . . . . .	14.05.96 .
Type	Number	Sequence Item Number		Attempted	Suggested	UM	UM Code	Description	
Replenish	3221	1,000 E001		20				BX PL 3583	Qty insufficient for instr.
				20				BX PL 3586	Insufficient qty for UOM.
			5.E .5	20	20	20		BX BX 3595	Used as random location.
		2,000 E001		20				BX PL 3583	Qty insufficient for instr.
				20				BX PL 3586	Insufficient qty for UOM.
			5.E .4	20	20	20		BX BX 3595	Used as random location.
		3,000 E001		20				BX PL 3583	Qty insufficient for instr.
				20				BX PL 3586	Insufficient qty for UOM.
			5.E .4	20	20	20		BX BX 3595	Used as random location.y

## What You Should Know About

### **Performing economic replenishments by batch**

When you use batch replenishment for economic (versus maximum) replenishment, 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. The system will print movement documents to replenish a greater quantity than the picking location can hold, and you might not be able to store all of the items in the picking location.

## Processing Options for Batch Replenishment

### **Default Processing:**

1. Enter the order group to use. \_\_\_\_\_

### **Replenishment Control:**

2. Enter the letdown point to use.  
If blank, the normal replenishment point is used.

'1' = Normal Replenishment Point.  
'2' = Minimum Replenishment Point.

3. Enter the method to use for replenishment quantities. If blank, method '2' is used.

'1' = Economic Replenishment.  
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.  
The quantity to replenish is the quantity which would fill the location.

### **Audit Control:**

4. Enter a '1' to generate the audit report, a '2' to generate the audit along with the glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated.

5. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used.

### **Task And Trip Assignment:**

6. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned.

7. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0003 is used. (See Form ID P46471).

---

## Creating Replenishment Requests Automatically

You can automatically replenish picking locations when picking depletes the stock to minimum replenishment levels. This 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.

### Before You Begin

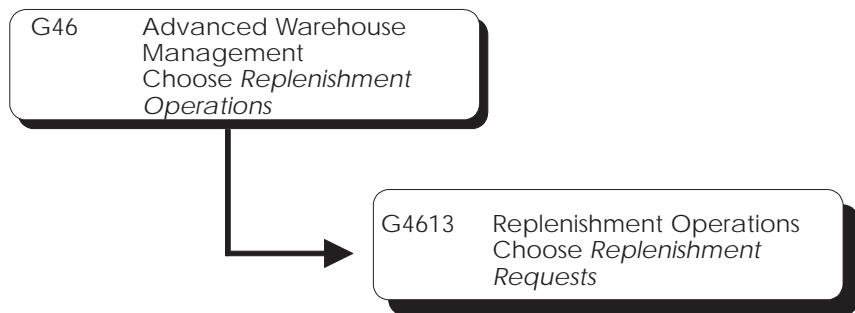
- Verify that you have set up picking instructions for replenishment
- Verify that you have set up location profiles for replenishment
- Verify that you have set up replenishment instructions for replenishment
- Verify that you have set up fixed picking locations for replenishment
- Verify that you have set up fixed replenishment zones for replenishment
- Verify that you have set a processing option in the Process Replenishment Requests program to create replenishment requests automatically

### See Also

- *Defining Movement Instructions*
- *Defining Location Profile Information*

- *Setting Up Fixed Locations and Zones*
- *Creating Replenishment Suggestions*

### Locating 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 locate the request using unique criteria, such as an order number, a document type, or an item number.

#### ► **To locate existing replenishment requests**

---

On Replenishment Requests

The screenshot shows a computer window titled '[4600] - Replenishment Requests'. The window has a menu bar with 'Functions', 'Options', 'Tools', and 'Help'. The main area contains search fields for 'Request Batch', 'Order Number', and 'Item Number', and a dropdown for 'Branch/Plant' (set to 'BR') and 'Status' (set to '200'). Below these is a table with columns: 'D', 'Batch', 'Seq', 'Item', 'Quantity', 'UM', and 'To Location'. One row is visible with values: '3279', '1.000', 'PS', '4', 'EA', and '1/D/1'. At the bottom are standard window controls (minimize, maximize, close) and a toolbar with a checkmark icon and a delete icon. The status bar at the bottom shows 'Opt: 9=Cancel F3=Exit F24=More MW'.

1. Complete the following field:
  - Branch/Plant
2. Complete one or more of the following optional fields:
  - Status
  - Request Batch
  - Order Number
  - Document Type
  - Item Number

### What You Should Know About

**Cancelling  
replenishment requests**

You can use Replenishment Requests to cancel replenishment requests. You cancel requests to stop further processing and replenishment. 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.

You must first cancel any existing replenishment suggestions for the request before you cancel the replenishment request.



# Work with Replenishment Suggestions

---

## Working with Replenishment Suggestions

After you create replenishment requests, you create replenishment suggestions for locations from which to move items to refill depleted picking locations.

Complete the following tasks:

- Create replenishment suggestions
- Confirm replenishment suggestions

### Before You Begin

- 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

## Creating 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 (using the Batch Replenishment program), or automatically (with the Process Replenishment Requests program). You can create alternate replenishment suggestions with the Resuggest Replenishment Requests program to replace existing suggestions with which you do not agree.

Complete the following tasks:

- Create replenishment suggestions by batch
- Create replenishment suggestions automatically
- Create alternate replenishment suggestions

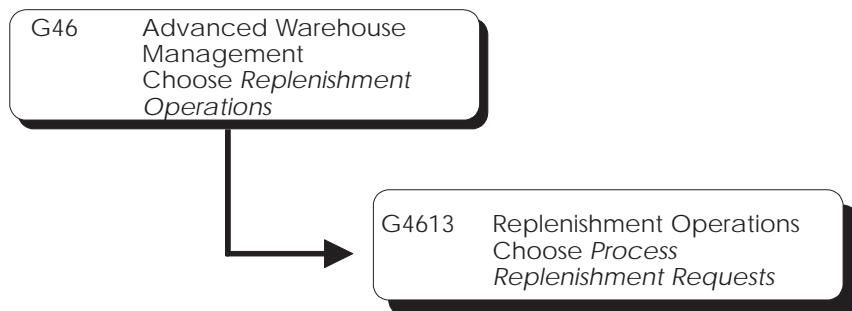
### Creating Replenishment Suggestions by Batch

You create replenishment suggestions by batch to process replenishment requests and move inventory on a regular basis. You can compensate for the rapid depletion of fixed picking locations by creating replenishment suggestions several times each day. You typically run batch programs during off-peak hours, when more system resources are available.

Complete the following tasks:

- Run Process Replenishment Requests
- Run Batch Replenishment

#### Running Process Replenishment Requests



When you run the Process Replenishment Requests program, the system can:

- Select all outstanding replenishment requests
- Update each request's status in the Warehouse Requests table (F4600)
- 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 the Process Replenishment Requests program.

Process Replenishment Requests is a DREAM Writer program.

				J.D. Edwards & Company Replenishment Audit Report				Page No. . . . 2 Date - . . . 14.05.96 .	
. . . Request . . . .				. . . Quantity . . . Pr L1 Usg					
Type	Number	Sequence	Item Number	Location	Attempted	Suggested	UM UM Code	Description	
Replenish	3220	1,000	P002	R.	.		10	10	CR CR 3596 Request overrode location.

## Processing Options for Process Replenishment Requests

### **Task And Trip Assignment:**

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. \_\_\_\_\_
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471). \_\_\_\_\_

### **Audit Control:**

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated. \_\_\_\_\_
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.) \_\_\_\_\_

### **Confirmation Control:**

5. Enter a '1' to automatically confirm suggestions. \_\_\_\_\_
6. Enter the override next status for the confirmed sales order lines. \_\_\_\_\_

(Pick Processing Only).

**Resuggestions:**

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed.

---

**Replenishment Control:**

8. Enter the method to use for replenishment quantities. If blank, method '2' is used.

---

'1' = Economic Replenishment.  
The quantity to replenish is retrieved from the fixed location definition.

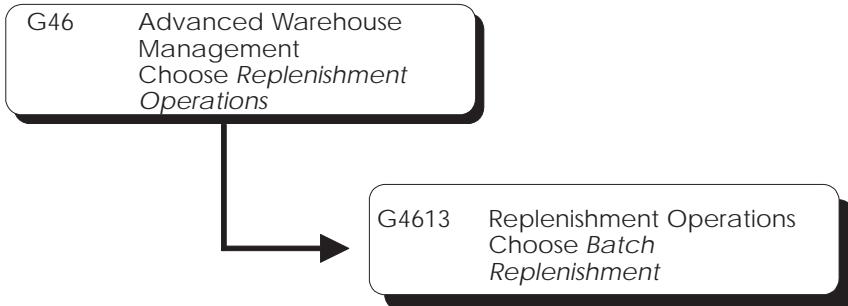
'2' = Maximum Replenishment.  
The quantity to replenish is the quantity which would fill the location.

**Replenishment Control: (Cont)**

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used.  
(See form ID P46471)

---

### Running Batch Replenishment



When you run the Batch Replenishment program, the system can:

- Select all fixed picking locations at or below the normal or minimum replenishment point
- Create replenishment requests
- Create suggestions for locations to replenish from
- Update each request's status in the Warehouse Requests table (F4600)
- 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 the Batch Replenishment program.

Batch Replenishment is a DREAM Writer program.

J.D. Edwards & Company Putaway Audit Report							Page No. . . . .	2
							Date - . . . .	14.05.96 .
. . . Request . . . .			Location	Quantity . . .	Pr	L1	Usg	
Type	Number	Sequence	Item Number	Attempted	Suggested	UM	UM	Code
Replenish	3221	1,000	E001	.	.	20		BX PL 3583 Qty insufficient for instr.
				.	.	20		BX PL 3586 Insufficient qty for UOM.
		5, E	.5	.	20	20		BX BX 3595 Used as random location.
		2,000	E001	.	.	20		BX PL 3583 Qty insufficient for instr.
				.	20			BX PL 3586 Insufficient qty for UOM.
		5, E	.4	.	20	20		BX BX 3595 Used as random location.
		3,000	E001	.	20			BX PL 3583 Qty insufficient for instr.
				.	20			BX PL 3586 Insufficient qty for UOM.
		5, E	.4	.	20	20		BX BX 3595 Used as random location.y

## What You Should Know About

### Performing economic replenishments by batch

When you use batch replenishment for economic (versus maximum) replenishment, 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. The system will print movement documents to replenish a greater quantity than the picking location can hold, and you might not be able to store all of the items in the picking location.

## See Also

- *Creating Replenishment Requests by Batch* for information about how the batch program selects locations for replenishment

## Processing Options for Batch Replenishment

**Default Processing:**

1. Enter the order group to use. \_\_\_\_\_

**Replenishment Control:**

2. Enter the letdown point to use.  
If blank, the normal replenishment point is used.

'1' = Normal Replenishment Point.  
'2' = Minimum Replenishment Point.

3. Enter the method to use for replenishment quantities. If blank, method '2' is used.

'1' = Economic Replenishment.  
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.  
The quantity to replenish is the quantity which would fill the location.

**Audit Control:**

4. Enter a '1' to generate the audit report, a '2' to generate the audit along with the glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated.

5. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides.  
If blank, XJDE0001 is used.

**Task And Trip Assignment:**

6. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned.
7. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0003 is used.  
(See Form ID P46471).

## Creating Replenishment Suggestions Automatically

You can replenish fixed picking locations automatically when picking depletes the stock to minimum replenishment levels. This 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 also creates replenishment requests for picking locations which contain a quantity that is smaller than the minimum replenishment quantity. The system then runs the appropriate programs to:

- Select all outstanding replenishment requests
- Update each request's status in the Warehouse Requests table (F4600)
- 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 the following programs:

- Process Replenishment Requests
- Create Replenishment Tasks
- Replenishment Document and Tags

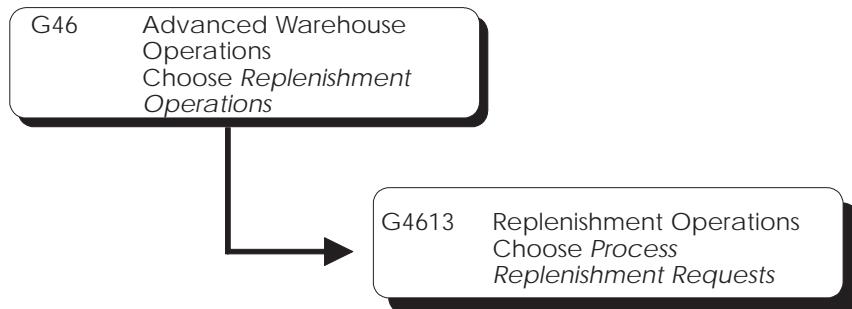
### Before You Begin

- Verify that you have set up picking instructions for replenishment
- Verify that you have set up location profiles for replenishment
- Verify that you have set up replenishment instructions for replenishment
- Verify that you have set up fixed picking locations for replenishment
- Verify that you have set up fixed replenishment zones for replenishment
- Verify that you have set a processing option in the Process Replenishment Requests program to create replenishment requests automatically

### See Also

- *Defining Movement Instructions*
- *Defining Location Profile Information*
- *Setting Up Fixed Locations and Zones*
- *Creating Replenishment Suggestions*

### Creating Alternate Replenishment Suggestions



You can create alternate replenishment suggestions if you do not agree with the system's suggestions for replenishment locations. You create alternate suggestions by running the Resuggest Replenishment Requests program.

Creating alternate suggestions replaces any previous location suggestions. With alternate suggestions, you can access new inventory locations that you may have added since you created the first suggestion(s).



To create alternate replenishment suggestions, you must cancel the original replenishment suggestions manually. The Resuggest Replenishment Requests program does not cancel existing suggestions.

**CAUTION:** To create alternate replenishment suggestions, you must cancel the original replenishment suggestions manually. The Resuggest Replenishment Requests DREAM Writer program does not cancel existing suggestions.

If you have not changed inventory locations in your warehouse, and you want to create suggestions for locations that are different than previous suggested locations, you must change the replenishment instructions table. 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, the Resuggest Replenishment Requests program suggests the same locations as in the previous suggestions.

When you run the Resuggest Replenishment Requests program, the system can:

- Create alternate 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 the Resuggest Replenishment Requests program.

Resuggest Replenishment Requests is a DREAM Writer program.

J.D. Edwards & Company Replenishment Audit Report						Page No. . . . .
. . . Request . . . . .			Quantity . . . . .	Pr L1 Usg	UM UM Code	Date - . . . . .
Type	Number	Sequence Item Number	Location	Attempted	Suggested	Description
Replenish	19,000	CREAM CHEESE		480	CR PL	3583 Qty insufficient for instr.
				480	CR PL	3586 Insufficient qty for UOM.
	12.A	.		480	CR CA	3457 Location is not picking loc.
	12.B	.		480	CR CA	3457 Location is not picking loc.
	12.C	.		480	CR CA	3457 Location is not picking loc.
	12.D	.		480	CR CA	3457 Location is not picking loc.
	12.E	.		480	CR CA	3457 Location is not picking loc.
	12.F	.		480	CR CA	3457 Location is not picking loc.
	12.G	.		480	CR CA	3457 Location is not picking loc.
	12.H	.		480	CR CA	3636 Same From and To Location
	14.C	.3		480	480	CR CR 3595 Used as random location.
3220	1,000	P002	R.	10	10	CR CR 3594 Used as fixed location.

## Processing Options for Resuggest Replenishment Requests

### Task And Trip Assignment:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. \_\_\_\_\_
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471). \_\_\_\_\_

### Audit Control:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated. \_\_\_\_\_
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.) \_\_\_\_\_

**Confirmation Control:**

5. Enter a '1' to automatically confirm suggestions. \_\_\_\_\_
6. Enter the override next status for the confirmed sales order lines. (Pick Processing Only). \_\_\_\_\_

**Resuggestions:**

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed. \_\_\_\_\_

**Replenishment Control:**

8. Enter the method to use for replenishment quantities. If blank, method '2' is used. \_\_\_\_\_

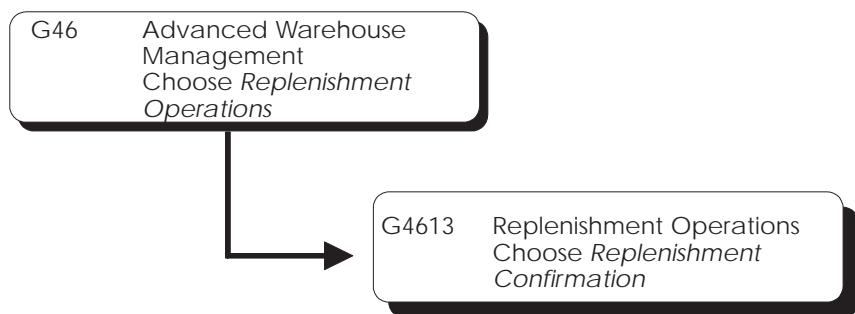
'1' = Economic Replenishment.  
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.  
The quantity to replenish is the quantity which would fill the location.

**Replenishment Control: (Cont)**

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used.  
(See form ID P46471) \_\_\_\_\_

## Confirming Replenishment Suggestions



If you agree with the system's suggestions for replenishment locations, you confirm them using Replenishment Confirmation. If you do not agree, you can create alternate suggestions or cancel the existing suggestions. You can also change suggested locations or split a suggestion for one location into two locations.

During confirmation, you can also confirm with variance. When you confirm with variance, you confirm that you are replenishing a quantity that is smaller than the original quantity. The system moves the remaining unconfirmed quantity to the variance location you defined in the item profile. For example, if your warehouse employees damaged some of the items when they moved them from the replenishment location, you would send the damaged items to the variance location.

During confirmation, you can also overpick. When you overpick, you confirm that you are replenishing a quantity that is greater than the original quantity. The system moves the excess quantity to the overflow location you defined in the item profile. For example, for a replenishment request of 20 items, it is easier to pick a case of 24 items and send 4 of them to the overflow location than it is to replenish 20 eaches.

When you confirm suggestions for replenishment, you:

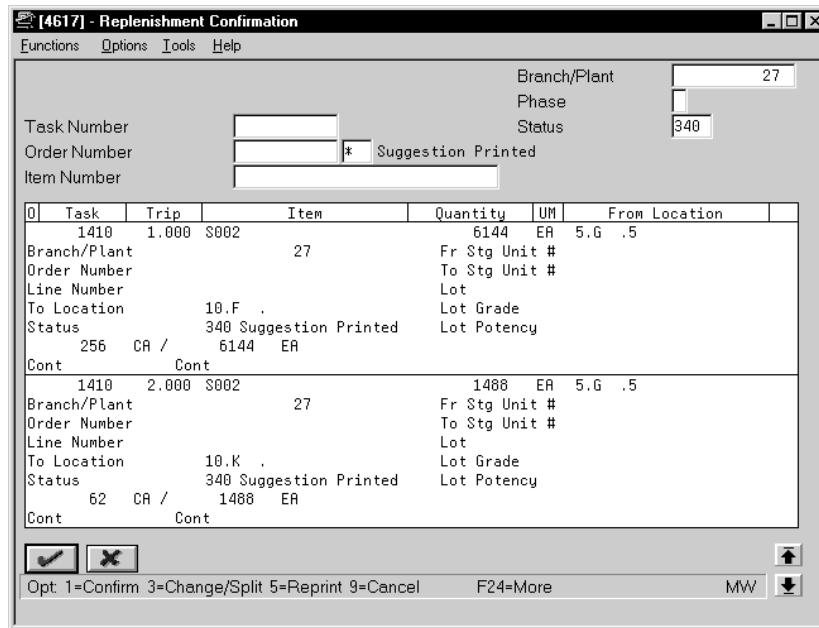
- Reduce on-hand inventory in the replenishment location
- Reverse the commitment of inventory in the replenishment location
- Increase on-hand inventory in the picking location
- Reverse the commitment of inbound inventory in the picking location

Replenishment confirmation ensures that the system's records match actual inventory movements by updating the following tables:

- Item Location (F41021)
- Location Detail Information (F4602)
- Item Ledger (F4111)
- Warehouse Requests (F4600)
- Warehouse Suggestions (F4611)
- Task Header (F4601)

Complete the following tasks:

- Confirm replenishment suggestions
- Change or split replenishment suggestions



## ► To confirm replenishment suggestions

---

On Replenishment Confirmation

1. Complete the following fields:
  - Branch/Plant
  - Task Number
  - Order Number
  - Document Type
  - Item Number
2. To confirm the suggested locations and quantities, choose Confirm.

## ► To change or split replenishment suggestions

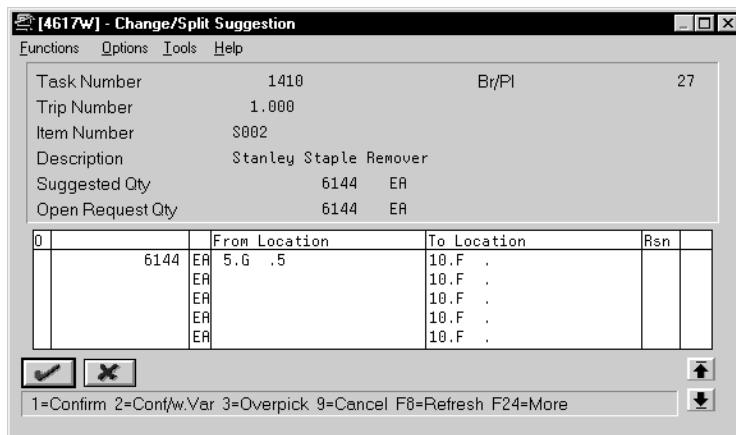
---

On Replenishment Confirmation

1. Complete the following fields:
  - Branch/Plant
  - Task Number
  - Order Number
  - Document Type

- Item Number

2. To split or change a replenishment suggestion, access Change/Split Suggestion.



3. On Change/Split Suggestion, complete the following fields for each location into which you want to split or change the suggestion:
  - Quantity
  - From Location
  - Reason
4. To confirm a smaller quantity than the suggested quantity and move the remainder to the designated variance location, choose Confirm with Variance.
5. To confirm a greater quantity than the suggested quantity and move the excess to the designated overflow location, choose Overpick.
6. To confirm the suggested locations and quantities, choose Confirm.

## What You Should Know About

### Creating new suggestions for different quantities

If you confirm a quantity less than the original quantity, and you do not choose Confirm with Variance to move the remainder to the variance location, the system creates a new suggestion for the remaining quantity. The remaining quantity stays open on the original suggestion so you can confirm it separately.

### Canceling replenishment suggestions

You can use Replenishment Confirmation to cancel replenishment suggestions. You cancel suggestions to stop further processing and replenishment.



# Appendices



# Appendix A — Advanced Topics

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## About Advanced Topics

The procedures in Advanced Topics are not required to operate your warehouse. However, they provide more flexibility in inventory movement, record keeping, and so on. You can:

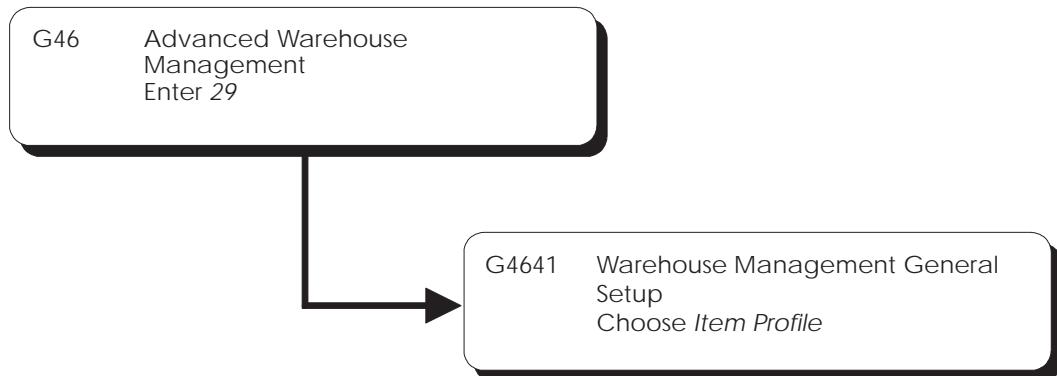
- Generate detailed movement records by confirming movement out of one location and into another in two separate steps
- Segregate tax-paid inventory in special locations according to tax codes that you assign
- Reduce putaway trips to a location by placing a hold on putaway until you deplete the inventory in the location
- Track large units of measure of an item by assigning special 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 equipment failure by setting the maximum quantity for an item in a zone
- Change the effect of movement instructions by changing an item's warehouse process groups
- Use warehouse space more efficiently by setting up rules to randomly select locations
- Prevent errors in system records by updating the Warehouse Suggestions, Item Location, and Location Detail Information tables with identical information
- Generate reports of location detail information (in unusual circumstances, such as system failure, where you need to reconstruct information)

Complete the following tasks:

- Set up two-phase movement confirmation
- Assign tax codes

- Set up freeze rules
- Set up tracking numbers
- Set up rollup
- Set up repack
- Define maximum quantity by zone
- Work with item dimension and warehouse process groups
- Set up random rules
- Create the Random Location table
- Repost open location suggestions
- Manage location detail information

## Setting Up Two-Phase Movement Confirmation



You use one-phase confirmation to confirm inventory movement as one step, after you move the items out of the From location and into the To location. You use two-phase confirmation to confirm inventory movement:

- When you move the items out of the From location and into a staging location
- When you move the items out of the staging location and into the To location

You can use two-phase movement confirmation to generate reports for audit purposes that show the movement of items during each phase.

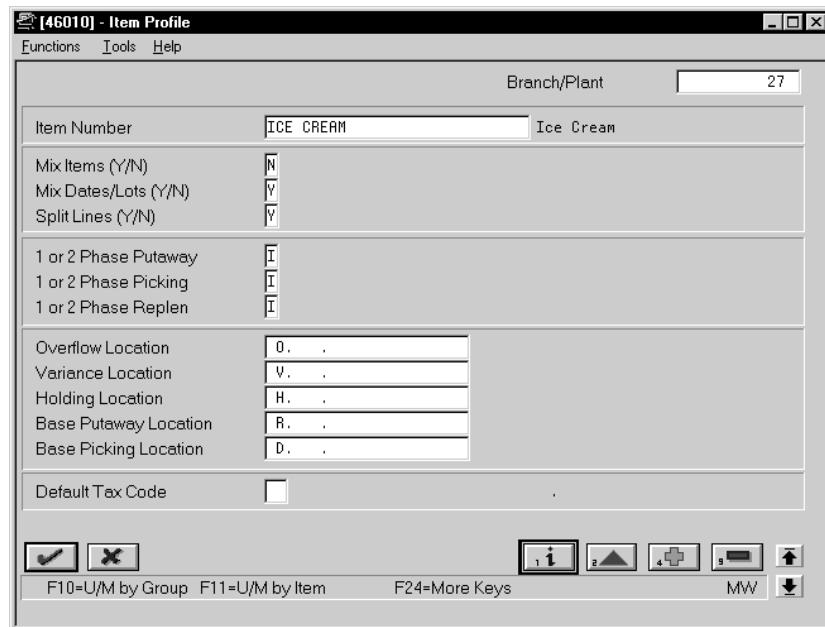
You can use either a physical (real) staging location, or a logical staging location that exists only in the system's database. You use a logical staging location to

generate separate documents for movement out of the From location and into the To location without actually using a physical staging location.

If you use two-phase confirmation, you must set it up for each item and for each From location.

### ► To set up two-phase confirmation

On Item Profile



1. To use two-phase confirmation, complete the following fields for each item:
  - Branch/Plant
  - Item Number
  - 1 or 2 Phase Putaway
  - 1 or 2 Phase Picking
  - 1 or 2 Phase Replenishment
2. Access Location Profile Detail.

**[460201] - Location Profile Detail**

Functions Tools Help

Location		Branch/Plant	27
Level of Detail	4	Loc. Dimension Group	SDPR-S Single Deep Pallet R
Staging Locn (Y/N)	N	Characteristics Grp	COOLER Cooler Characteristi
Recommend Crtn (Y/N)	N	Loc. Tax Code	
Mix Containers (Y/N)	Y	Allowed Containers	
Mix Dates/Lots (Y/N)	Y	Minimum Putaway %	
Max No. of Items		Minimum Pick %	
Freeze Rule		Verification Code	
Allow Putaway (Y/N)	Y	Putaway Zone / Stage	COOLER . .
Allow Pick (Y/N)	Y	Picking Zone / Stage	COOLER . .
Allow Replen (Y/N)	Y	Replen. Zone / Stage	COOLER . .
Putaway Sequence	100	Latitude	30
Pick Sequence	294	Longitude	210
Replen Sequence		Height	0
<input checked="" type="checkbox"/> <input type="checkbox"/> <span style="font-size: 2em;">i</span> <span style="font-size: 1.5em;">1</span> <span style="font-size: 1.5em;">2</span> <span style="font-size: 1.5em;">3</span> <span style="font-size: 1.5em;">4</span> <span style="font-size: 1.5em;">5</span> <span style="font-size: 1.5em;">6</span> <span style="font-size: 1.5em;">7</span> <span style="font-size: 1.5em;">8</span> <span style="font-size: 1.5em;">9</span> <span style="font-size: 1.5em;">0</span> <span style="font-size: 1.5em;">↑</span> <span style="font-size: 1.5em;">↓</span>			
F5=Allowed Containers F6=Define Containers F10=Dimensions F24=More MW			

3. On Location Profile Detail, complete the following fields for each location that requires two-phase confirmation:

- Branch/Plant
- Location
- Putaway Stage
- Picking Stage
- Replenishment Stage

---

Field	Explanation
1 or 2 Phase Putaway	<p>A code that indicates whether you use 1- or 2-phase confirmation during putaway.</p> <ul style="list-style-type: none"> <li>• 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.</li> <li>• 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.</li> </ul>

---

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

---

Field	Explanation						
1 or 2 Phase Picking	<p>A code that indicates whether you use 1- or 2-phase confirmation during picking.</p> <ul style="list-style-type: none"><li>• 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.</li><li>• 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.</li></ul> <p>If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.</p> <ul style="list-style-type: none"><li>• Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.</li><li>• 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.</li></ul> <p>Valid codes are:</p> <table><tbody><tr><td>I</td><td>Use 1-phase confirmation</td></tr><tr><td>L</td><td>Use logical 2-phase confirmation</td></tr><tr><td>P</td><td>Use physical 2-phase confirmation</td></tr></tbody></table>	I	Use 1-phase confirmation	L	Use logical 2-phase confirmation	P	Use physical 2-phase confirmation
I	Use 1-phase confirmation						
L	Use logical 2-phase confirmation						
P	Use physical 2-phase confirmation						

Field	Explanation						
1 or 2 Phase Replenishment	<p>A code that indicates whether you use 1- or 2-phase confirmation during replenishment.</p> <ul style="list-style-type: none"> <li>• 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.</li> <li>• 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.</li> </ul>						
	<p>If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.</p> <ul style="list-style-type: none"> <li>• Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.</li> <li>• 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.</li> </ul>						
	<p>Valid codes are:</p> <table> <tr> <td>I</td> <td>Use 1-phase confirmation</td> </tr> <tr> <td>L</td> <td>Use logical 2-phase confirmation</td> </tr> <tr> <td>P</td> <td>Use physical 2-phase confirmation</td> </tr> </table>	I	Use 1-phase confirmation	L	Use logical 2-phase confirmation	P	Use physical 2-phase confirmation
I	Use 1-phase confirmation						
L	Use logical 2-phase confirmation						
P	Use physical 2-phase confirmation						
Putaway Staging Location	<p>A code that specifies a warehouse location where you hold items temporarily (either physically or logically) before moving them somewhere else. You use the putaway staging location when the system suggests movement from one location to another while using two-phase confirmation. In two-phase confirmation, you confirm the movement from the first location to the staging location, and then confirm the movement from the staging location to the final location.</p>						
Picking Staging Location	<p>A code that specifies a warehouse location where you hold items temporarily (either physically or logically) before moving them somewhere else. You use the picking staging location when the system suggests movement from one location to another while using two-phase confirmation. In two-phase confirmation, you confirm the movement from the first location to the staging location, and then confirm the movement from the staging location to the final location.</p>						

Field	Explanation
Replenishment Staging Location	A code that specifies a warehouse location where you hold items temporarily (either physically or logically) before moving them somewhere else. You use the replenishment staging location when the system suggests movement from one location to another while using two-phase confirmation. In two-phase confirmation, you confirm the movement from the first location to the staging location, and then confirm the movement from the staging location to the final location.

## Assigning Tax Codes

You 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.

### ► To assign tax codes

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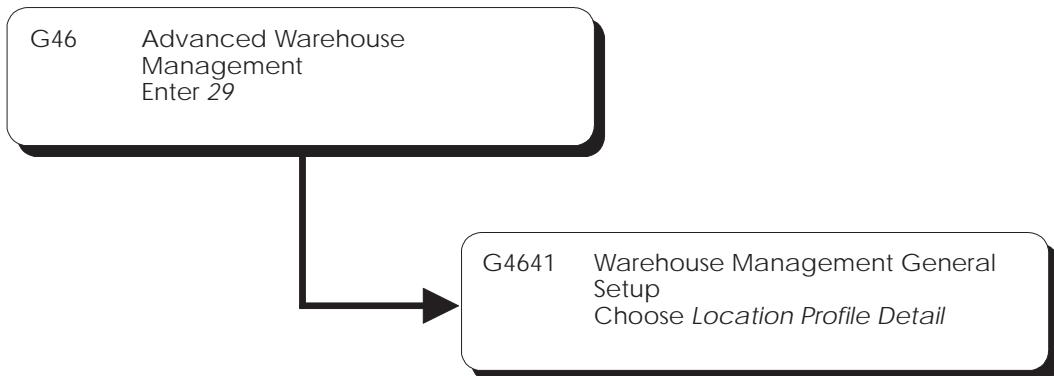
#### On Item Profile

1. To assign a tax code to an item, complete the following fields:
  - Branch/Plant
  - Item Number
  - Default Tax Code
2. Access Location Profile Detail.
3. On Location Profile Detail, complete the following field for each location to which you want to assign a tax code:
  - Location Tax Code

Field	Explanation
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).

Field	Explanation
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).

## Setting Up Freeze Rules

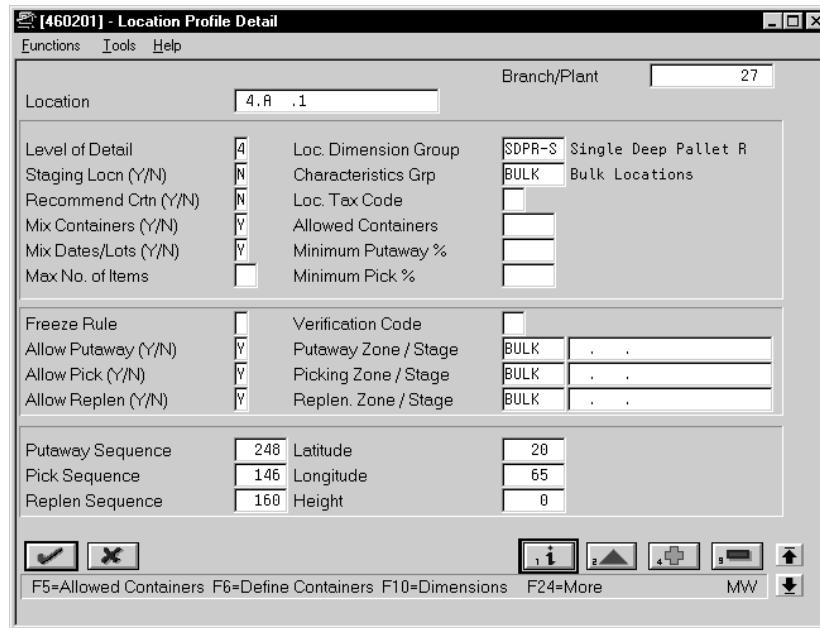


You use a freeze rule to determine how the system refills a pick location after picking. You can use a freeze rule to reduce the number of putaway trips that warehouse employees make to the location.

You must set up the freeze rule for each location for which you want to restrict putaway after picking.

### ► **To set up freeze rules**

On Location Profile Detail

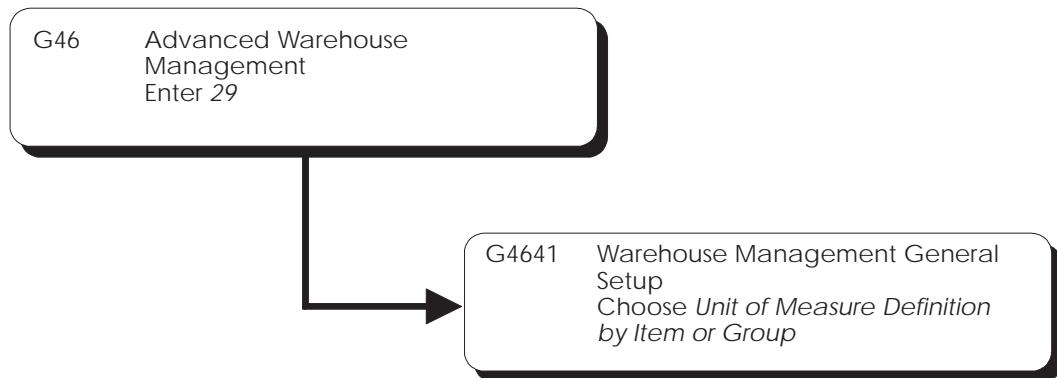


Complete the following fields:

- Branch/Plant
- Location
- Freeze Rule

Field	Explanation
Freeze Rule	<p>A code that indicates what putaway restrictions you want to place on a location during the pick process.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> <li>Blank No freeze. The system does not perform any automatic restrictions.</li> <li>1 Freeze when empty. Do not put away to this location after you pick the location empty.</li> <li>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.</li> <li>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.</li> </ul>

## Setting Up Tracking Numbers

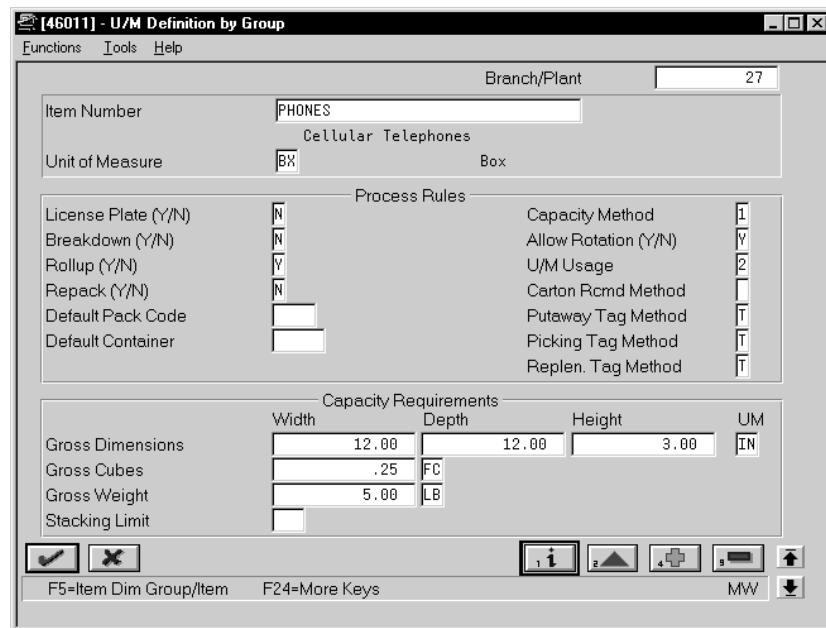


You can track large units of measure, such as a pallet, by assigning a tracking number when you create a movement request. For example, you can assign a “license plate” tracking number to a pallet of expensive stereo equipment to locate it easily.

If you use license plate tracking for a particular item/unit of measure combination, the system generates one tracking number for each unit of measure of that item.

### ► To set up tracking numbers

On Unit of Measure Definition by Item or Group



Complete the following fields:

- Branch/Plant
- Item Number or Item Dimension Group
- Unit of Measure
- License Plate

Field	Explanation				
License Plate Tracking	<p>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.</p> <p>Valid codes are:</p> <table><tr><td>Y</td><td>Yes, assign a tracking number to the item</td></tr><tr><td>N</td><td>No, do not assign a tracking number to the item</td></tr></table>	Y	Yes, assign a tracking number to the item	N	No, do not assign a tracking number to the item
Y	Yes, assign a tracking number to the item				
N	No, do not assign a tracking number to the item				

### What You Should Know About

<b>Limitations of license plate tracking</b>	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).
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### Setting Up Rollup

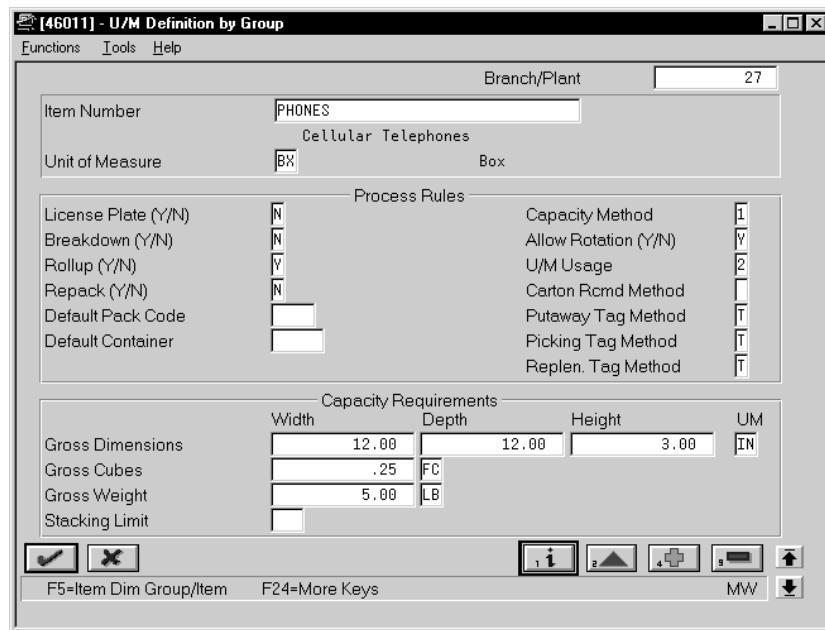
You can convert large units of measure into smaller units of measure during putaway. You can also convert small units of measure into larger units of measure during picking. For example, if 24 cases of compact discs equal a pallet, you can pick a pallet instead of the requested 24 cases. This improves warehouse efficiency by using the most appropriate unit of measure for picking.

You set up the unit of measure definition for an item or a group to use rollup. You also must set up your pick instructions to use rollup.

#### **To set up rollup**

---

On Unit of Measure Definition by Item or Group



1. Complete the following fields:
  - Branch/Plant
  - Item Number or Item Dimension Group
  - Unit of Measure
  - Rollup
2. Access Picking Instructions.
3. On Picking Instructions, select the appropriate picking instruction table and complete the following field for each unit of measure to use rollup:
  - Rollup

## Setting Up 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.

### ► To set up repack

On Unit of Measure Definition by Item or Group

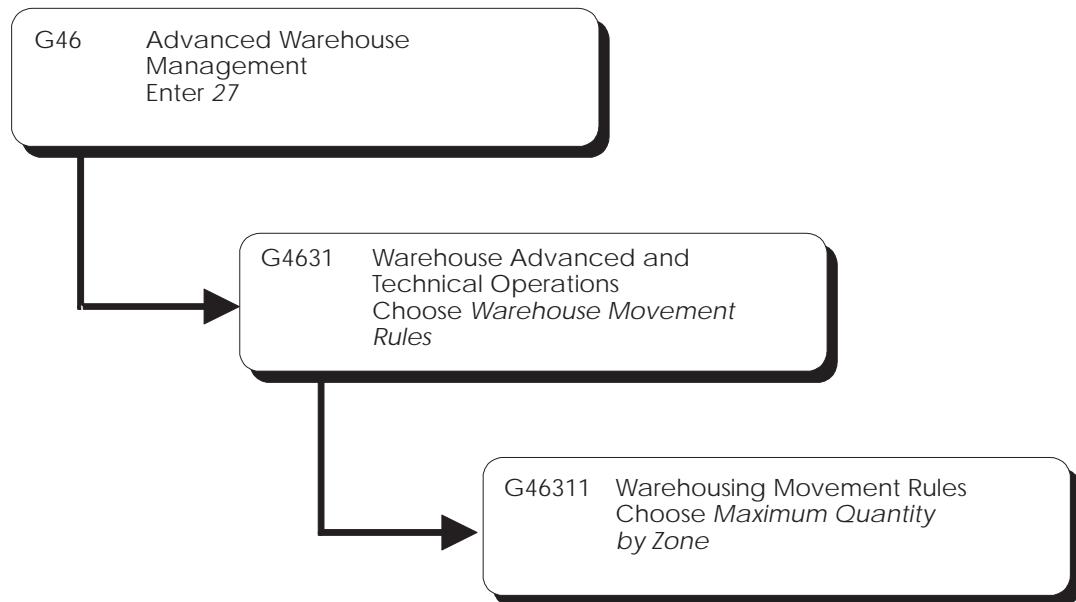
Complete the following fields:

- Branch/Plant

- Item Number or Item Dimension Group
- Unit of Measure
- Repack

Field	Explanation
Rpack (Y/N)	<p>A code that determines whether the specified item in this unit of measure should be repacked before putaway. Valid codes are:</p> <p>Y Yes, repack the item N No, do not repack the item</p> <p>You must also specify a packing method by entering a code in the Default Pack Code field.</p>

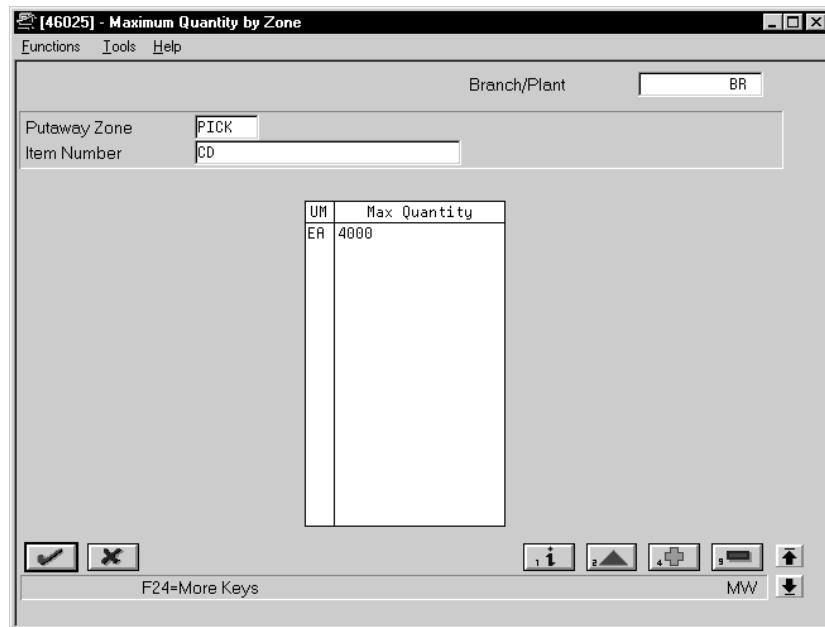
## Defining Maximum Quantity by Zone



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 are 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. Or, 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.

► **To define maximum quantity by zone**

On Maximum Quantity by Zone

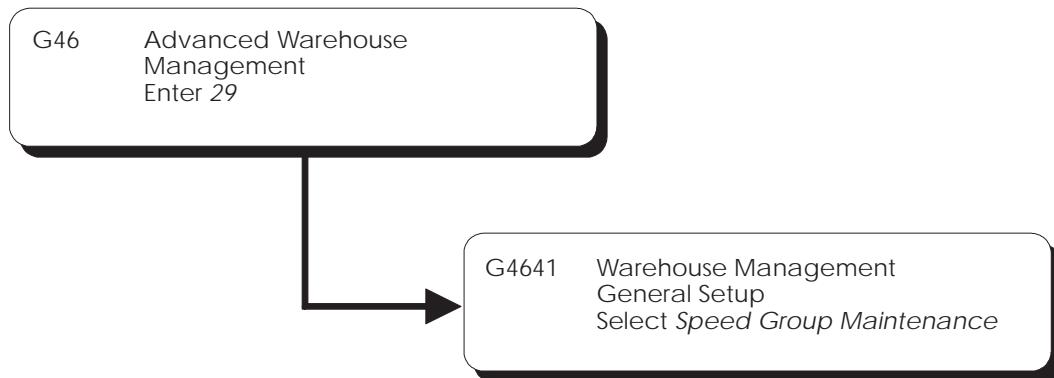


Complete the following fields:

- Branch/Plant
- Putaway Zone
- Item Number
- Unit of Measure
- Maximum Putaway Quantity

Field	Explanation
Quantity – Maximum Putaway	This indicates the maximum quantity to be putaway in a particular putaway zone. This quantity can be defined by putaway zone and unit of measure or putaway zone, item and unit of measure. For example, you may want to limit the quantity in a zone so if your picking devices fail in that zone you can then pick it from another zone.

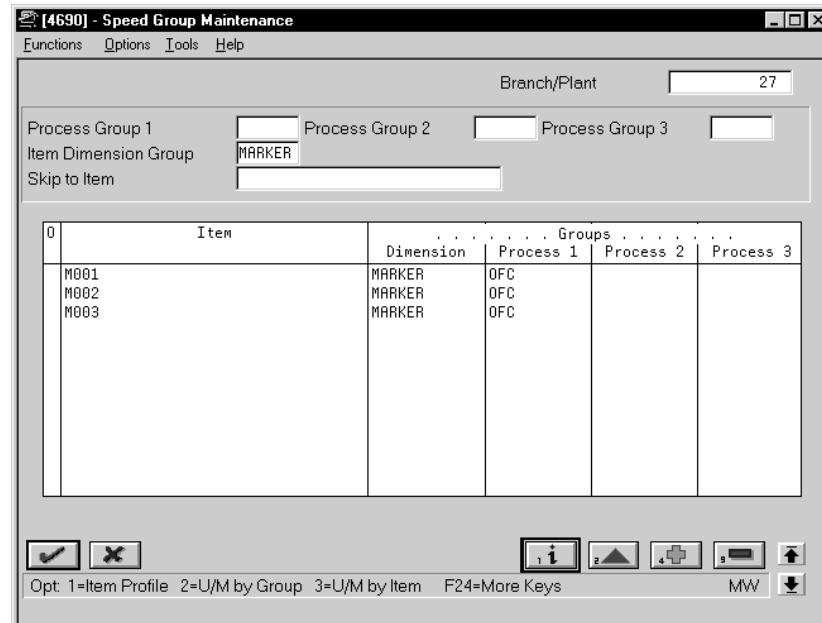
## Working with Item Dimension and Warehouse Process Groups



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 you choose. This can change the putaway, picking, or replenishment location you use during inventory movement.

### ► To work with item dimension and warehouse process groups

#### On Speed Group Maintenance



1. To limit the information that displays, complete the following fields in the upper part of the form:
  - Process Group 1
  - Process Group 2

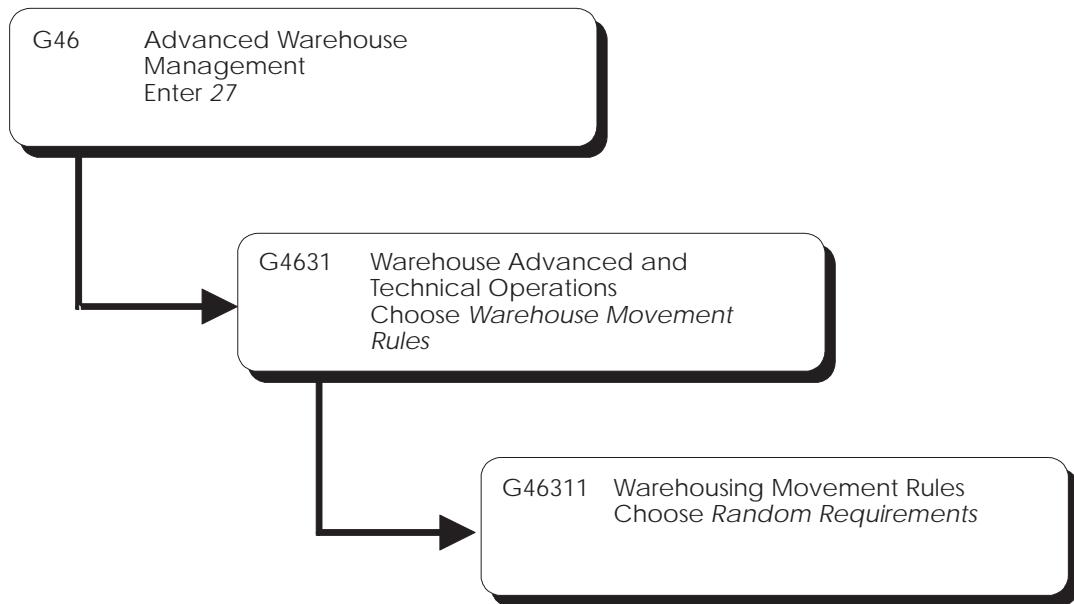
- Process Group 3
- Item Dimension Group
- Skip to Item

2. To change groups for a particular item, complete the following fields in the lower part of the form:

- Item Dimension Group
- Process Group 1
- Process Group 2
- Process Group 3

<b>Field</b>	<b>Explanation</b>
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).
Process Group 1	A code (system 41/type 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.
Process Group 2	A code (system 41/type 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.
Process Group 3	A code (system 41/type 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.

## Setting Up Random Rules



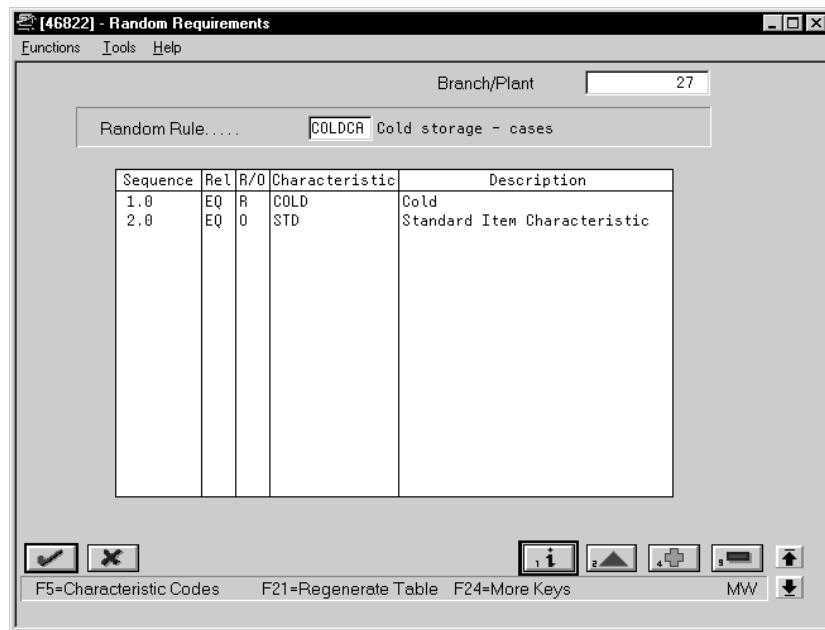
You use random rules to make location selection more efficient by randomly distributing items throughout the warehouse instead of using fixed locations for putaway, picking, and replenishment. You create a random rule using random requirements that are based on location characteristics.

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

### ► **To set up random rules**

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On Random Requirements



Complete the following fields:

- Branch/Plant
- Random Rule
- Sequence
- Relationship
- Required/Optional
- Characteristic

Field	Explanation
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.
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.

Field	Explanation
Random 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.
Relationship	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).  Valid values are: EQ     Search for locations with characteristics that equal the random rule characteristics NE     Search for locations with characteristics that do not equal the random rule characteristics
Required/Optional	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: R     Use only locations that have this required characteristic O     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.

### What You Should Know About

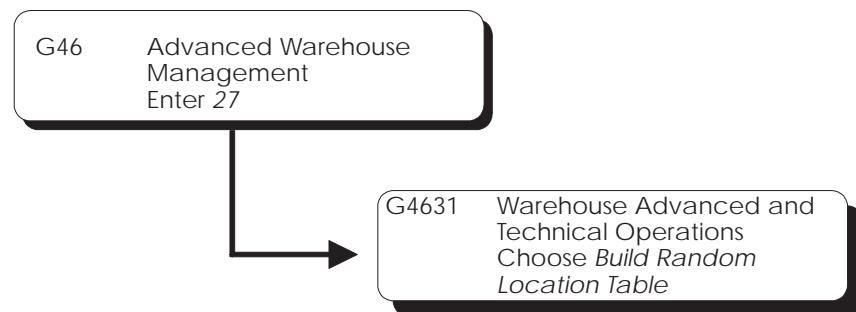
**Rebuilding the Random Location table** After you add or change a random rule or a location characteristic, you must rebuild the Random Location table using the Build Random Location Table program (P46821). This updates the table with the changes you made.

Run the Build Random Location Table program in batch mode from the Warehouse Advanced and Technical Operations menu, instead of running it interactively from Random Requirements. This ensures that your terminal remains free for other processing.

**Automatically  
rebuilding the Random  
Location table during  
putaway**

If you do not run the Build Random Location Table program, the next putaway request that uses the random rule will cause the system to automatically rebuild the Random Location table. This might result in slower processing of the movement request.

## Creating the Random Location Table

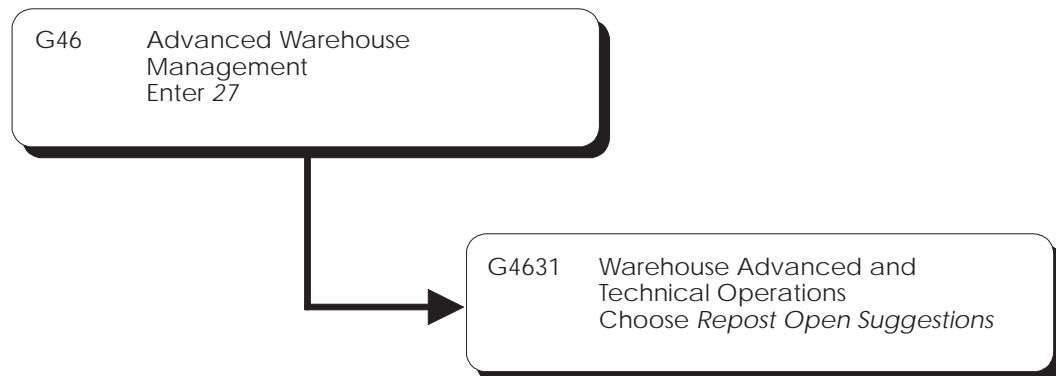


The Random Locations table contains a list of all the random locations and their characteristics. You run the Build Random Location Table after you change your random rule requirements or after you change the characteristics of random locations.

When you run the Build Random Location Table program, the system matches location characteristics with random rule characteristics and updates the Random Locations table (F46821).

Build Random Location Table is a DREAM Writer program.

## Reposting Open Location Suggestions



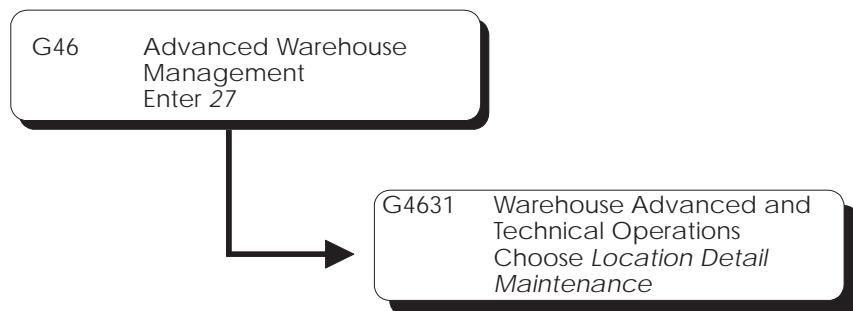
An open suggestion is a quantity of an item for which you have created a putaway, picking, or replenishment suggestion, but for which you have not confirmed the movement. You repost open location suggestions in the event that the location suggestion information in the Item Location, Location Detail Information, and Warehouse Suggestions tables does not match.

When you run the Repost Open Suggestions program, the system:

- Examines the suggestions in Warehouse Suggestions (F4611)
- Updates the suggestion information in Item Location (F41021)
- Updates the suggestion information in Location Detail Information (F4602)

Repost Open Suggestions is a DREAM Writer program.

## Managing Location Detail Information



You can review and change information in the Location Detail Information table. You might do this after a system failure and you need to reconstruct information about locations.



J.D. Edwards recommends that you limit the use 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.

**CAUTION:** J.D. Edwards recommends that you limit the use of this screen. If you change information in the Location Detail Information table, you must also update the Requests and Suggestion tables to avoid mismatched information and unpredictable inventory movements.

### ► To manage location detail information

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On Location Detail Maintenance

**[4602] - Location Detail Maintenance**

Functions Tools Help

Item Number		P002	Branch/Plant	27	
Location		2.D .3	Green Bar - Continuous Form		
Detail Sequence Number		1	Lot/SN		
Quantity	Lvl 1	Lvl 2	Lvl 3	Lvl 4	Lvl 5
Contr	PAL1	UM	PL	UM	CR
Hght Per	66.00		12.00		
Width Per	36.00		18.00		
Depth Per	48.00		11.00		
Cubes Per	66.00		1.37		
Wght. Per	2,225.00		55.00		
Used Cubes	528.00		Used Weight	17,800.00	
Reserved Cubes			Reserved Weight		
Qty in Primary	320		Qty Hard Commit		
Primary U/M	CR		Quantity Inbound		
Stg. Unit #			Quantity Outbound		
<input checked="" type="checkbox"/> <input type="checkbox"/>		<input type="checkbox"/> <input type="checkbox"/>		<input type="checkbox"/> <input type="checkbox"/>	
F24=More Keys		1		MW	

1. Complete the following fields:

- Branch/Plant
- Item Number
- Location
- Lot Serial Number
- Detail Sequence Number

2. Complete the following fields for item unit of measure level (1 through 5):

- Quantity
- Container
- Unit of Measure
- Height Per Unit of Measure
- Width Per Unit of Measure
- Depth Per Unit of Measure
- Cubes Per Unit of Measure
- Weight Per Unit of Measure

3. Complete the following fields:

- Used Cubes
- Reserved Cubes
- Used Weight
- Reserved Weight

- Quantity in Primary
- Primary Unit of Measure
- Storage Unit Number
- Quantity Hard Committed
- Quantity Inbound
- Quantity Outbound

Field	Explanation
Lot	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.
Sequence Number – Location Detail	The sequence number that identifies a record in the Location Detail table (F4602). The system uses this number to distinguish between the different pallets, cases, and so forth, for the same item in the same location.
Quantity – Total Level 1	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 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.
Height per – Level 1	The height of the item as defined in the item/unit of measure profile for level 1 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.
Width per – Level 1	The width of the item as defined in the item/unit of measure profile for level 1 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.

Field	Explanation
Depth per – Level 1	The depth of the item as defined in the item/unit of measure profile for level 1 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per – Level 1	The gross cubic dimensions of one item/unit of measure, or the cubic dimensions of the container for the item's level 1 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight – Level 1	The weight of one item per unit of measure, or the weight of the item and container in the level 1 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Quantity – Total Level 2	The total quantity of the item in the item's level 2 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 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.
Height per – Level 2	The height of the item as defined in the item/unit of measure profile for level 2 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.
Width per – Level 2	The width of the item as defined in the item/unit of measure profile for level 2 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.

Field	Explanation
Depth per – Level 2	The depth of the item as defined in the item/unit of measure profile for level 2 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per – Level 2	The gross cubic dimensions of one item/unit of measure, or the cubic dimensions of the container for the item's level 2 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight – Level 2	The weight of one item per unit of measure, or the weight of the item and container in the level 2 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Quantity – Total Level 3	The total quantity of the item in the item's level 3 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 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.
Height per – Level 3	The height of the item as defined in the item/unit of measure profile for level 3 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.
Width per – Level 3	The width of the item as defined in the item/unit of measure profile for level 3 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.

Field	Explanation
Depth per – Level 3	The depth of the item as defined in the item/unit of measure profile for level 3 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per – Level 3	The gross cubic dimensions of 1 item/unit of measure, or the cubic dimensions of the container for the item's level 3 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight – Level 3	The weight of one item per unit of measure, or the weight of the item and container in the level 3 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Quantity – Total Level 4	The total quantity of the item in the item's level 4 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 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.
Height per – Level 4	The height of the item as defined in the item/unit of measure profile for level 4 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.
Width per – Level 4	The width of the item as defined in the item/unit of measure profile for level 4 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.

Field	Explanation
Depth per – Level 4	The depth of the item as defined in the item/unit of measure profile for level 4 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per – Level 4	The gross cubic dimensions of 1 item/unit of measure, or the cubic dimensions of the container for the item's level 4 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight – Level 4	The weight of one item per unit of measure, or the weight of the item and container in the level 4 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Quantity – Total Level 5	The total quantity of the item in the item's level 5 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 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.
Height per – Level 5	The height of the item as defined in the item/unit of measure profile for level 5 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.
Width per – Level 5	The width of the item as defined in the item/unit of measure profile for level 5 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.

Field	Explanation
Depth per – Level 5	The depth of the item as defined in the item/unit of measure profile for level 5 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per – Level 5	The gross cubic dimensions of 1 item/unit of measure, or the cubic dimensions of the container for the item's level 5 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight – Level 5	The weight of one item per unit of measure, or the weight of the item and container in the level 5 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Cubic Dimensions – Reserved	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.
Amount – 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.
Quantity–Total	The total quantity in primary unit of measure for this location detail.
Storage Unit Number	A number that uniquely identifies goods in specific location detail information. Location detail contains a storage unit number if you turn on license plate tracking in the Item/UOM Profile (P46011) for the item's level 1 unit of measure.
	The system assigns a storage unit number to a storage unit when it creates a request or suggestion.

Field	Explanation
Quantity – Hard Committed	<p>The number of units committed to a specific location and lot.</p> <p>..... <i>Form-specific information</i> .....</p>
	<p>When the system creates a suggestion for picking from a specific location, it also updates the committed quantity for that location. When you confirm the suggestion, the system removes the committed quantity from the location you picked from and adds the quantity to the quantity in the destination location, which is usually your shipping location.</p>
Quantity Inbound – Warehouse	A quantity in the primary unit of measure that you expect to add to the location detail after you confirm a putaway or replenishment suggestion.
Quantity Outbound – Warehouse	A quantity in the primary unit of measure that you expect to remove from the location after you confirm a picking or replenishment suggestion.

# Appendix B — Manufacturing Information

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## About Manufacturing Information

You can create putaway requests and pick requests within the Advanced Warehouse Management system. You also can create putaway requests and pick requests using manufacturing systems.

## Creating 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 Advanced 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.

Complete the following tasks:

- Create the parts list
- Identify ineligible items (optional)
- Set processing options in manufacturing programs

## What You Should Know About

### Origin code

The system identifies manufacturing pick requests as originating from a work order instead of the usual sales order.

**In warehouse and out of warehouse status** After you create a pick request, the material status in the parts list changes to In Warehouse. After you create and confirm a pick suggestion, the Material Status changes to Out of Warehouse to indicate that the parts have moved from the warehouse into the manufacturing environment.

### Creating the Parts List

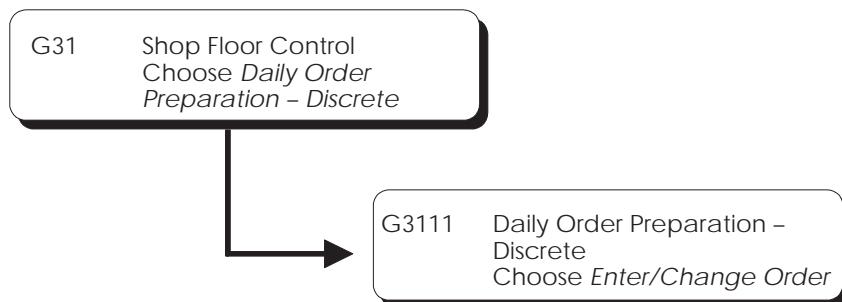
To create a pick request through manufacturing systems, you must create a parts list that identifies the items to pick. You can create a parts list:

- Interactively, through work order entry
- By batch, with an order processing program

Complete the following tasks:

- Create the parts list interactively
- Create the parts list by batch

#### Creating the Parts Lists Interactively



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.

#### ► **To create the parts list interactively**

---

On Enter/Change Order

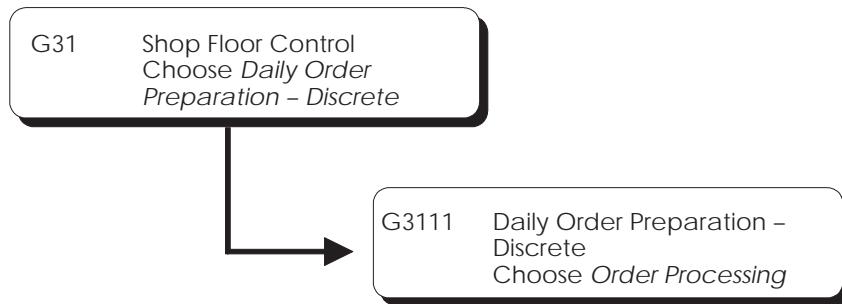
[48013] - Enter/Change Order		Order Number	16411	WO
Functions Tools Help		Requested	03/29/96	
Item Number	M.O. Scheduling		Qty Ordered	2
Description			Qty Completed	
Status Comment			Qty Scrapped	
Bill Type	M	Standard Manufacturing	Bi	
Routing Type	M	Standard Manufacturing	Ro	Branch/Plant
Type			Lot Number	12-20
Status	10	Released (Firm)	Not Start	Charge to CC
Priority			Cost Code	
Category Code 1			Start Date	03/28/96
Category Code 2			W.O. Date	03/20/96
Category Code 3			Completed	
Reference			Parent W.O. No	
Planner	9100	Wilson, Bob	Revision Level	
Supervisor			Freeze Code	
Customer			Associated SO	
Remarks				
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
F5=Detail F6=Parts List F8=Routing F15=Address F24=More MW				

## 1. Access Work Order Parts List.

2. On Work Order Parts List, complete the following fields:

- Item Number
- Transaction Quantity
- Unit of Measure

### Creating the Parts List by Batch



You create a parts list by batch with the Generate and Print Work Orders program. You typically run the batch program during off-peak hours, when more system resources are available.

#### 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* for more information about creating a parts list by batch

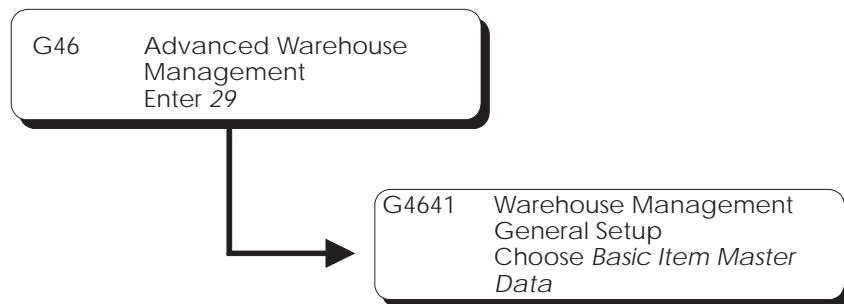
### Identifying Ineligible Items

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 Advanced Warehouse Management system for this particular order.

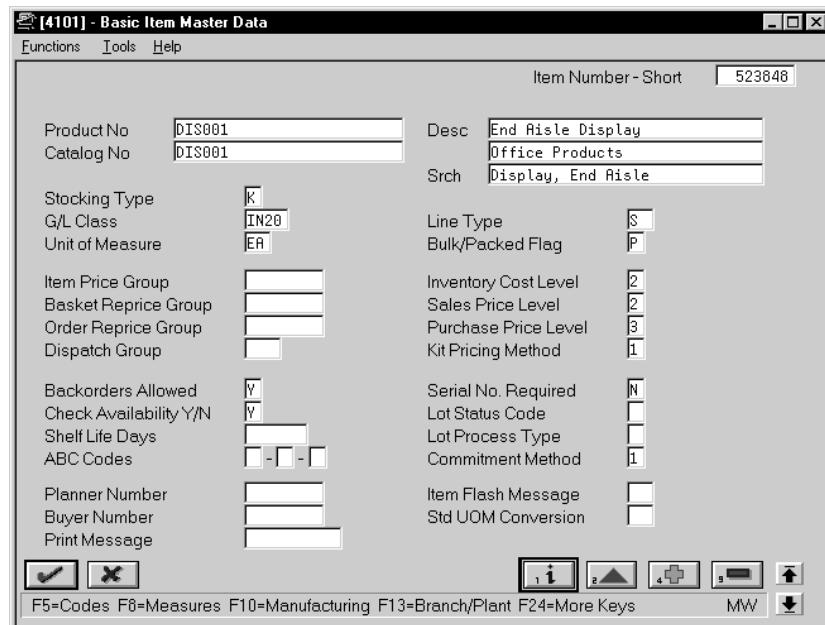
Complete the following tasks:

- Identify ineligible items through item master information
- Identify ineligible items through the work order parts list

► To identify ineligible items through item master information



On Basic Item Master Data



1. Access Manufacturing Values Entry.

The screenshot shows the Manufacturing Values Entry window (41013). The window title is "[41013] - Manufacturing Values Entry". The menu bar includes Functions, Tools, and Help. The main area contains several input fields and dropdowns:

Item Number	DIS001	End R aisle Display	
Order Policy Code	1	Issue Type Code	I
Value Order policy		Planning Code	1
MFG Leadtime Quantity		Planning Fence Rule	S
Accounting Cost Qty	1	Fixed/Variable	F
Planning Fence	15	Round to Whole Number	
Freeze Fence		Material Status	06
Message Display Fence		Leadtime Level	2
Drawing Size		Leadtime Manufacturing	
Last Revision No		Leadtime Cumulative	
Drawing Number		Leadtime Per Unit	
Grade/Potency Pricing		Grade Control	N
Potency Control	N	Standard Grade	
Standard Potency		From - Thru Grade	
From - Thru Potency			

At the bottom are buttons for save (checkmark), cancel (cross), and navigation (F12=Previous, F24=More Keys, MW).

2. On Manufacturing Values Entry, complete the following fields:

- Item Number
- Material Status

Field	Explanation
Material Status	<p>A code (table 31/MS) that designates the status of an item.</p> <p>..... <i>Form-specific information</i> .....</p> <p>The system pulls the value from this field to the Material Status field of the Parts List table.</p>

### ► To identify ineligible items through the work order parts list

On Enter/Change Order

1. Access Work Order Parts List.
2. On Work Order Parts List, complete the following field:
  - Order Number
3. Do one of the following:
  - In WorldSoftware, access the fold area
  - In WorldVision, access Item Master and then Manufacturing Values Entry

4. Complete the following field for each item that is ineligible for picking:

- Material Status

Field	Explanation
Status	<p>A code (table 31/MS) that identifies the current status of a particular component on the work order.</p> <p>..... <i>Form-specific information</i> .....</p> <p>Change this code to “No Warehouse/Manufacturing Interface” for items that you do not want to process through the Advanced Warehouse Management system. You can change this status on the parts list only when processing work orders interactively.</p>

## Setting Processing Options in Manufacturing Programs

To create picking requests through manufacturing programs, set the processing options for one or both of these programs:

- Work Order Processing (P31410)
- Work Order Entry (P48013)

### What You Should Know About

#### **Availability checking**

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 enough quantity of the item is in the work center to complete the work order.
- The system creates 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 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 enough quantity of the item is 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.

If you use lot processing, the system also searches through lots to find items on the parts list.

### Processing Options for Enter/Change Orders

#### **Backscheduling Information:**

1. Enter the Unit of Measure Code \_\_\_\_\_

#### **Recalculation Options:**

2. Enter a '1' to automatically recalculate Parts List and Routing dates, hours and quantities. \_\_\_\_\_

#### **Item Location Validation:**

3. Enter a '1' to validate for existing Branch/Item record. \_\_\_\_\_

**Charge To Business Unit Default:**

4. Enter a '1' to default the Charge to Business Unit from the Job number in the Business Unit Master file (F0006). If left blank, the Branch/Plant will be used.

---

**Bill Availability:**

5. Enter the version of Bill Availability to be called. Default is ZJDE0001.

---

**Default Processing:**

6. Enter defaults for the following:

- a. Document Type (Default is 'WO')
- b. Type (Optional)
- c. Priority (Optional)
- d. Beginning Status (Optional)

---

6. (CONTINUED)  
Enter default values for the following:

- e. Category Code 1 (Optional)
- f. Category Code 2 (Optional)
- g. Category Code 3 (Optional)

Or enter Item Branch Class Code fields to retrieve default values.

- h. Category Code 1 (Optional)
- i. Category Code 2 (Optional)
- j. Category Code 3 (Optional)

---

**Sales Order Hold Code:**

7. Enter the Hold Code for the relate sales order if the work order quantity or date changes. Blanks will not update the sales order.

---

**Purchase Order Hold Code:**

8. Enter the Hold Code for the related purchase order if the work order quantity or date changes. Blanks will not update the purchase order.

Note- The purchase order will be updated only if the work order routings are recalculated.

---

**Field Display:**

9. Enter a '1' by the following fields to activate them:

- a. Bill Type
- b. Routing Type

---

**Process Manufacturing Processing:**

10. Enter a '1' to create the Resource List records for Co-/By-Products when a process work order is entered. If left blank, the Co-/By-Product resource list records will be created when the ingredients list is created.

---

**Interactive Bill/Routing Attachment:**

11. Enter a '1' to automatically create the WO Routing Instructions when creating the WO Parts List on-line.

---

12. Enter a '1' to automatically create the WO Parts List when creating the WO Routing Instructions on-line. \_\_\_\_\_

**Commitment And Substitute Processing:**

13. Enter commitment option for creating the WO Parts List on-line.

Blank - Commit to primary location  
1 - Commit per Commitment Control in Mfg Constants (P3009)  
2 - Same as '1', but use substitutes for shortages  
3 - Same as '1', but only use substitutes if their quantity available can cover shortages  
4 - Same as '1', but display substitute availability window when substitute qty available can cover shortage

---

**Eco Processing:**

14. Enter the version of the ECO header to call from Revisions Window (P30BREV). If left blank, version ZJDE0001 will be used.

---

**Serial Number Processing:**

15. Enter the version of Assign Serial Numbers to call. If left blank, version ZJDE0001 will be used.

---

**Prior Revisions:**

16. Enter a '1' to permit attaching parts lists at prior revision levels. If left blank, prior revision levels will not be used.

---

**Warehouse Processing:**

17. Enter the request processing mode  
' ' = No pick requests  
'1' = Generate requests only  
'2' = Generate requests and process using the subsystem

---

18. If processing pick requests using the subsystem, enter the DREAM Writer version to use. If blank, XJDE0002 is used.  
(See Form ID P46171)

---

19. Enter the default staging location for moving goods out of the warehouse. The parts picked from the warehouse are staged at this location prior to use within manufacturing. (F1=Location Window)

---

20. Enter a '1' if the default staging location should be checked for availability. If the part is available at the staging location a request will NOT be generated. This option only applies to parts without work center locations.

---

**Quality Management Processing:**

21. Enter a '1' to attach the Work Order/Routing tests on-line. \_\_\_\_\_

**Generic Text Copy Options:**

22. Enter a '1' to copy component generic text to the parts list. \_\_\_\_\_  
23. Enter a '1' to copy the operation's generic text to the work order routing. \_\_\_\_\_

**Obsolete Items:**

24. Enter the cross reference code for retrieving item replacements for obsolete items. \_\_\_\_\_

## Processing Options for Order Processing

**Generation Information:**

1. Enter one of the following:  
1 - Parts List only  
2 - Routing only  
3 - Both Parts List and Routing  
If left blank, neither Parts List nor Routing will be generated.  
2. Enter a '1' to use the W.O. Date for Effectivity checking. (Default is the W.O. Start Date.) \_\_\_\_\_

**Update Information:**

3. Enter the new Status Code for the Work Order Header. If left blank, status will not be changed. \_\_\_\_\_

**Work Order Print Information:**

4. Enter a '1' to print Work Orders.  
If printing Work Orders: \_\_\_\_\_

**Parts List Print Information:**

5. Enter a '1' to print Parts List \_\_\_\_\_  
6. Enter a '1' to print the 2nd line of information, which is scrap and related work center. \_\_\_\_\_  
7. Enter a '1' to print Parts List on a new page. \_\_\_\_\_  
8. Enter the DREAM Writer Version of the Parts List to print. If left blank, XJDE0001 is used.  
(See Form ID P31415.) \_\_\_\_\_  
9. Enter a '1' to print a consolidated Parts List. \_\_\_\_\_

**Routing Instructions Print Info:**

10. Enter a '1' to print Routing \_\_\_\_\_  
11. Enter a '1' to print Routing on a new page. \_\_\_\_\_  
12. Enter the DREAM Writer Version to be executed for the desired sequencing of the Routing. If left blank, the operation sequence is used.  
(See Form ID P314151.) \_\_\_\_\_

**Backscheduling Information:**

13. Enter the Unit of Measure for backscheduling. \_\_\_\_\_

**Shop Packet Summary Information:**

14. Enter a '1' to print the Shop Packet Summary. \_\_\_\_\_

**Shortage Report Information:**

15. Enter the DREAM Writer Version of the Shortage Report to execute. If left blank, no shortage report will be printed. (See Form ID P31418.) \_\_\_\_\_

**Bar Code Information:**

16. Enter the DREAM Writer Version to be executed for the desired print overrides for Bar Coding. (See Form ID P31413.) \_\_\_\_\_

**Inventory Issue Information:**

17. Enter the DREAM Writer Version of Batch Inventory Issues to execute. If left blank, the Inventory Issues program will not be called. (See Form ID P31420) \_\_\_\_\_

**Purchase Order Information:**

(Used for Sub-Contract Routings)

18. Enter the Document Type \_\_\_\_\_  
19. Enter the Line Type \_\_\_\_\_  
20. Enter the Beginning Status \_\_\_\_\_  
21. Enter a '1' to default the tax area from the 'Ship-To' address book number. If left blank, the tax area will default from the Supplier address book number. \_\_\_\_\_

**Sales Order Information:**

22. Enter the new Line Type for kit and configured components. This is used to avoid issuing inventory from Sales Order processing. The Line Type used should be inventory interface 'N'. If left blank, Line Type will not be changed. \_\_\_\_\_  
23. Enter the Next Status for Sales Order kit and configured component lines. (This is used to bypass the normal flow of the order, i.e., Pick Slip.) If left blank, status will not be changed. \_\_\_\_\_  
24. Enter a '1' to print Sales Order Text lines. \_\_\_\_\_

**Configured Item Costs:**

25. Enter one of the following options for calculating the standard cost for configured items in the WO Variance file (F3102).  
1 - Always calculate the standard cost.  
2 - Only calculate the standard \_\_\_\_\_

cost if it has not already been done (no variance records exist.)  
If left blank, standard cost will not be calculated.

**Bom Substitutes:**

26. Enter a '1' to allow the use of Bill of Material substitutes in case of a shortage. \_\_\_\_\_

**Purchasing Journal Entries:**

27. Enter a '1' to load the Work Order Number into the Subledger field of the purchasing J/E's. \_\_\_\_\_

**Blanket/Quote Processing:**

28. Enter a '1' for automatic blanket order release processing. \_\_\_\_\_

**Build Against Prior Revisions:**

29. Enter a '1' to permit building work orders against prior revision levels. The revision level in the work order header (F4801) will be used to select the parts list to attach to the work order. If left blank, prior revision level bills will not be selected. \_\_\_\_\_

**Warehouse Processing:**

30. Enter the request processing mode:  
1 - Generate requests only  
2 - Generate requests and process using the subsystem.  
If left blank, requests will not be generated. \_\_\_\_\_

31. If processing pick requests using the subsystem, enter the DREAM Writer version to use. If left blank, XJDE0002 will be used.  
(see Form ID P46171) \_\_\_\_\_

32. Enter the default staging location for moving goods out of the warehouse. The parts picked from the warehouse are staged at this location prior to use within manufacturing. (F1=Location Window) \_\_\_\_\_

33. Enter a '1' if the default staging location should be checked for availability. If the part is available at the staging location a request will NOT be generated.  
This option only applies to parts without work center locations. \_\_\_\_\_

**Quality Management Options:**

34. Enter a '1' to attach the Work Order/Routing tests. \_\_\_\_\_

**Generic Text Print Options:**

35. Enter a '1' to print component \_\_\_\_\_

generic text on the Parts List.  
36. Enter a '1' to print operation  
generic text on the Routing.

---

## Creating 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 Advanced 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.

### Setting Processing Options in Manufacturing Programs

To control the creation of putaway requests through manufacturing completions, set the processing options for one or more of these programs:

- Work Order Inventory Completion (P31112)
- Super Backflush (P31123)
- Rate Schedule Workbench (P3114)

### Processing Options for Work Order Inventory Completion

#### **Inventory Interface:**

1. Enter the Document Type associated  
with an Inventory Completion.

---

#### **Work Order Issues:**

2. Enter a '1' to call the Work Order  
Issues program after a successful  
Completion program execution.

3. Enter the DREAM Writer version of  
Work Order Issues to be called.  
If left blank, version 'ZJDE0001'  
will be used.

---

#### **Work Order Header:**

4. Enter the Status Code for update to  
the Work Order Header. (Optional)

5. Enter a '1' to default the Work  
Order Number into the Subledger  
Field. (Blanks will not default.)

---

#### **Sales Order Options:**

6. Enter a '1' to default the Sales  
Order number into the Lot Number  
for the location record.

---

**Item Location Processing:**

7. Enter a '1' to allow Work Order Completions into held lots. \_\_\_\_\_

**Item Lot Processing:**

8. Enter a '1' to allow overriding the lot number upon completion. \_\_\_\_\_

**Warehouse Processing:**

9. Enter the Directed Putaway mode:  
' ' : No Directed Putaway Requests  
'1' : Request Putaway only  
'2' : Request Putaway and process using the subsystem

10. If processing putaway requests through the subsystem, enter the DREAM Writer version to be used. If blank, ZJDE0001 is used.  
(See Form ID P46171)

### Processing Options for Super Backflush

**Status Codes Defaults:**

NOTE - Blanks will not update the Status Code.

1. Enter the default Operation Status Code for Partial Completions. \_\_\_\_\_
2. Enter the default Operation Status Code for Full Completions. \_\_\_\_\_
3. Enter the Status Code for update to the Work Order Header. \_\_\_\_\_
4. Enter the default Material Status Code for Issues. \_\_\_\_\_

**Shop Floor Activity Information:**

5. Enter the Version of the Hours and Quantity Program to call.  
If left blank, a blind Hours and Quantities execution will be performed.

**Blind Hours And Quantities Entry:**

6. Enter the Document Type associated with Shop Floor Activity. \_\_\_\_\_

**Work Order Issues Information:**

7. Enter the Version of the Material Issues Program to call.  
If left blank, a blind execution of Work Order Inventory Issues will be performed.

**Blind Work Order Issues:**

8. Enter the Document Type associated with a Work Order Issue. \_\_\_\_\_

9. Enter the acceptable lot hold codes (up to 5) for inventory issues, or \_\_\_\_\_

enter '\*' for issues to all held lots. Blanks will not allow issues.

**Work Order Completion Information:**

10. Enter the Version of the Work Order Completions Program to call.  
If left blank, a blind Work Order Completions execution will be performed.

**Blind Work Order Completions:**

11. Enter the Document Type associated with an Inventory Completion.
12. Enter the Document Type associated with an Inventory Scrap.

**Edit Information:**

13. Enter the Status Code beyond which Backflushing cannot be performed.

**Item Sales History Information:**

14. Enter a '1' if you wish blind issues to effect Item Sales History (F4115).

**Warehouse Processing:**

15. Enter the Directed Putaway mode.  
' ' : No Directed Putaway requests  
'1' : Request Putaway only.  
'2' : Request Putaway and process using the subsystem.
16. If processing putaway requests through the subsystem, enter the DREAM Writer version to be used.  
If blank, ZJDE0001 is used.  
(See Form ID P46171)

**Quantity Completion Control:**

17. Enter a '1' to verify that, for a given operation, the total of the quantity completed plus scrapped does not exceed the 'Quantity At Operation.' If left blank, the verification is not performed.

**Quality Management Options:**

18. Enter the Status Code for update to the Work Order if the Test Fails.
19. Enter the Status Code for update to the Work Order Operation if the Test Fails.
20. Enter the Status Code for update to the Lot if the Test Fails.

## Processing Options for Rate Schedule Workbench

**Interactive/Blind Execution:**

1. Enter the version of Inventory Issues to call. If left blank,

a blind execution of Inventory Issues will be performed.

2. Enter a '1' to call the Hours & Qty Entry window. If left blank, a blind execution of Hours & Qty entry will be performed.

### Document Types:

3. Enter the Document Type associated with Inventory Completions. \_\_\_\_\_
4. Enter the Document Type associated with Inventory Scrap. \_\_\_\_\_
5. Enter the Document Type associated with Inventory Issues. \_\_\_\_\_

#### **Versions To Execute:**

Enter the Dream Writer version to use for each program listed. If left blank, version ZJDE0001 will be used.

6. Rate Schedule Revisions (P3104) \_\_\_\_\_  
7. Schedule Load Review (P31224) \_\_\_\_\_

### Blind Issues:

8. Enter a '1' to process only  
Inventory Interface items.  
(Blanks will process all items).  
\_\_\_\_\_
9. Enter the acceptable lot hold codes  
(up to 5) for inventory issues, or  
enter '\*' for issues to all held  
lots. Blanks will not allow issues.  
\_\_\_\_\_

#### Item Sales History Information:

10. Enter a '1' if you wish blind issues to effect Item Sales History (F4115).

Primary Location Default:

11. Enter a '1' to default the item's primary location information for completions. If left blank, no default location will be loaded.

### Screen Defaults:

Enter the values to preload to the screen at initial inquiry. If left blank, no value will be preloaded.

#### Optional Transaction History:

14. Enter a '1' to write transaction details to the Hours and Quantities file (F31122). If left blank, only summary information is retained.

## Process Manufacturing Options:

15. Enter a '1' to allow unplanned Co- and By-product completions. \_\_\_\_\_

16. Enter a '1' to issue ingredients for each co-/by-product separately. \_\_\_\_\_  
Blanks will consolidate issues.

**Warehouse Processing:**

17. Enter the Directed Putaway mode:  
' ' : No Directed Putaway Requests  
'1' : Request Putaway only  
'2' : Request Putaway and process using the subsystem

18. If processing putaway requests through the subsystem, enter the DREAM Writer version to be used.  
If blank, ZJDE0001 is used.  
(See Form ID P46171).

**Generic Text Processing:**

19. Enter a '1' to copy generic text to components in Inventory Issues. \_\_\_\_\_  
20. Enter a '1' to copy generic text to opeartions in Hours and Quantity Entry.

**Quality Management Options:**

21. Enter the Status Code for update to the Lot if the Test fails. \_\_\_\_\_

## Appendix C — Technical Information

---

### About Technical Information

The following information describes the function of the Location Selection Driver program, which exists in six predefined versions in the Advanced Warehouse Management system:

- Process Putaway Requests
- Resuggest Putaway Requests
- Process Pick Requests
- Resuggest Pick Requests
- Process Replenishment Requests
- Resuggest Replenishment Requests

### Running the Process Putaway Requests Program

You run the Location Selection Driver program 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.

Process Putaway Requests and Resuggest Putaway Requests are DREAM Writer programs.

When you run the Process Putaway Requests program, the program performs the following functions:

**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.

<b>Creates error messages</b>	<p>The system creates an error message, which it displays during putaway confirmation, in the following instances:</p> <ul style="list-style-type: none"><li>• The putaway request's status is not 200 (Request Created) or 220 (Suggestion Created).</li><li>• Putaway suggestions already exist, and you have not set the program's processing options to create alternate suggestions.</li><li>• You tried to create alternate putaway suggestions after you confirmed the original suggestions.</li><li>• The warehouse (branch/plant) is not a valid warehouse in the address book.</li><li>• The system cannot convert the transaction's unit of measure into the item's primary unit of measure.</li><li>• The item's primary branch/plant record does not exist.</li><li>• The item's warehouse process groups and order group do not reference a valid putaway instruction table.</li></ul>
<b>Chooses an instruction table</b>	<p>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:</p> <ul style="list-style-type: none"><li>• Match all three warehouse process groups and the order group</li><li>• Match all three warehouse process groups</li><li>• Match the order group</li></ul> <p>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.</p>
<b>Chooses location types</b>	<p>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:</p> <ul style="list-style-type: none"><li>• Fixed locations</li><li>• Random locations</li><li>• Existing locations, which already contain the same item that you are moving</li><li>• Empty locations</li></ul> <p>If you specified a zone in the putaway instructions, the system searches for locations only within that putaway zone.</p>

<b>Chooses locations using location requirements</b>	From the eligible locations, the system selects the locations that: <ul style="list-style-type: none"><li>• You can use for putaway</li><li>• Have the same tax code as the item (optional)</li><li>• Are not the location from which you are moving the item (usually the receiving dock)</li></ul>
<b>Chooses locations using putaway instructions</b>	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: <ul style="list-style-type: none"><li>• Avoid exceeding the maximum putaway quantity for the location</li><li>• Meet the minimum utilization percentage</li><li>• Convert large units of measure into smaller units of measure, if necessary</li><li>• Complete partial units of measure, such as half-filled pallets</li></ul>
<b>Chooses locations using the item profile</b>	If you use the following criteria, the system selects locations where the item's profile allows you to: <ul style="list-style-type: none"><li>• Mix different items in a location</li><li>• Mix items with different dates or lot numbers in a location</li><li>• Split an order line into more than one location suggestion</li><li>• Move the items to a default location that you specify, if there is not enough space in the eligible locations</li></ul>

### **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:

- Divide the usable cubic capacity of the locations by the dimensions of the item you want to store in the location. The result must be less than or equal to 1.
- 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.
- Verify that the quantity of the item to store is equal to or less than the quantity that you defined for the location on Location Capacity Definition.

### **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

## Running the Process Pick Requests Program

You run the Location Selection Driver program 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.

Process Pick Requests and Resuggest Pick Requests are DREAM Writer programs.

When you run the Process Pick Requests program, the program performs the following functions:

<b>Locates outstanding pick requests</b>	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.
<b>Creates error messages</b>	<p>The system creates an error message, which it displays during pick confirmation, in the following instances:</p> <ul style="list-style-type: none"><li>• The pick request's status is not 200 (Request Created) or 220 (Suggestion Created).</li><li>• Pick suggestions already exist, and you have not set the program's processing options to create alternate suggestions.</li><li>• You tried to create alternate pick suggestions after you confirmed the original suggestions.</li><li>• The warehouse (branch/plant) is not a valid warehouse in the branch/plant constants.</li><li>• The system cannot convert the transaction's unit of measure into the item's primary unit of measure.</li><li>• The item's primary branch/plant record does not exist.</li><li>• The item's warehouse process groups and order group do not reference a valid picking instruction table.</li></ul>

### **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 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)

**Chooses locations using the 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
- 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 you stored the item.
- Rank locations from the oldest date to the newest date you received the item.

**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.

## Running the Process Replenishment Requests Program

You run the Location Selection Driver DREAM Writer program 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.

Process Replenishment Requests and Resuggest Replenishment Requests are DREAM Writer programs.

When you run the Replenishment Location Selection Driver program, the program performs the following functions:

### **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.

<b>Creates error messages</b>	<p>The system creates an error message, which it displays during replenishment confirmation, in the following instances:</p> <ul style="list-style-type: none"><li>• The replenishment request's status is not 200 (Request Created) or 220 (Suggestion Created).</li><li>• Replenishment suggestions already exist, and you did not delete the existing suggestions to create alternate suggestions.</li><li>• You tried to create alternate replenishment suggestions after you confirmed the original suggestions.</li><li>• The warehouse (branch/plant) is not a valid warehouse in the branch/plant constants.</li><li>• The system cannot convert the transaction's unit of measure into the item's primary unit of measure.</li><li>• The item's primary branch/plant record does not exist.</li><li>• The item's warehouse process groups and order group do not reference a valid replenishment instruction table.</li></ul>
<b>Chooses an instruction table</b>	<p>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:</p> <ul style="list-style-type: none"><li>• Match all three warehouse process groups and the order group</li><li>• Match all three warehouse process groups</li><li>• Match the order group</li></ul> <p>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.</p>
<b>Chooses location types</b>	<p>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:</p> <ul style="list-style-type: none"><li>• Fixed locations</li><li>• Random locations</li></ul>

<b>Chooses locations using location requirements</b>	From the eligible locations, the system selects the locations that: <ul style="list-style-type: none"><li>• You can use for replenishment</li><li>• Are not the location to which you are moving the item (usually a pick location)</li></ul>
<b>Chooses locations using replenishment instructions</b>	The system ranks the remaining eligible locations according to the tiebreaker that you specified in the replenishment instruction table. <p>If you use the following criteria, the system selects the locations for which you can:</p> <ul style="list-style-type: none"><li>• Meet the minimum utilization percentage</li><li>• Avoid exceeding the maximum replenishment quantity</li><li>• Combine smaller units of measure into larger units of measure, if necessary</li><li>• Use the First In First Out (FIFO) picking method based on the commitment method you specify on Branch/Plant Constants</li></ul> <p>You can set the picking method to:</p> <ul style="list-style-type: none"><li>• Avoid using FIFO. Instead, rank locations according to the tiebreaker.</li><li>• Rank locations from the lowest lot number to the highest lot number.</li><li>• Rank locations from the earliest expiration date to the latest expiration date for the date you stored the item.</li><li>• Rank locations from the oldest date to the newest date you received the item.</li></ul>
<b>Chooses locations using the location profile</b>	If you use the following criteria, the system selects locations based on whether the location profile detail allows you to: <ul style="list-style-type: none"><li>• Use the location for replenishment</li><li>• Include the location in the replenishment zone, if you specified one in the replenishment instructions</li><li>• Use the location's replenishment sequence number as a tiebreaker to rank locations that are otherwise equally suitable</li><li>• Use the location's proximity (latitude, longitude, and height) to the To location as a tiebreaker to rank locations that are otherwise equally suitable</li></ul>

<b>Replenishes from locations according to item availability</b>	From the eligible locations, you replenish items according to the following priority:
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- Replenish from locations with available quantity, ignoring inbound quantities (incoming purchase orders)
- Replenish from locations with inbound quantities

## Working with 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 (system 46/type PS):

- 200 Request created
- 220 Request suggested
- 250 Request in confirmation
- 291 Request canceled
- 299 Request closed
- 300 Location suggested
- 320 Suggestion assigned to tasks
- 340 Suggestion printed
- 391 Suggestion canceled
- 399 Suggestion confirmed

## Working with 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 (system 46/type PS):

- 100 Reservation created
- 191 Reservation canceled
- 199 Reservation closed



## **Appendix D — Dimension and Weight Calculations**

### **Calculating Dimensions and Weights for Putaway**

The Advanced 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 Profile table (F46011).

The system calculates item dimensions and weight for:

- Complete units of measure
- Partial units of measure

The system also performs calculations for:

- Items with storage containers
- Items without storage containers

### **Calculating Weight for a Complete Level 1 Unit of Measure**

Items with Storage Containers:

Total Weight = (Gross Weight + Container Weight) x Quantity

Items without Storage Containers:

Total Weight = Gross Weight x Quantity

### **Calculating Volume for a Complete Level 1 Unit of Measure**

Items with Open Storage Containers:

Total Volume = Width x Depth x Height of the container or the items' collective dimensions, whichever is greater

Items with Closed Storage Containers:

Total Volume = Width x Depth x Height of the container

Items without Storage Containers:

Total Volume = Gross Volume x Quantity

### **Calculating Weight for a Partial Level 1 Unit of Measure**

Percentage Filled = Number of primary units of measure present ÷ number of primary units of measure required to complete a Level 1 unit of measure

Percentage Filled = Number of primary units of measure present divided by the number of primary units of measure required to complete a Level 1 unit of measure

Total Weight = Weight of a Level 1 unit of measure x Percentage Filled

### **Calculating Volume for a Partial Level 1 Unit of Measure**

Percentage Filled = Number of Level 2 units of measure present ÷ number of Level 2 units of measure required to complete a Level 1 unit of measure

Percentage Filled = Number of Level 2 units of measure present divided by the number of Level 2 units of measure required to complete a Level 1 unit of measure

Total Volume = Volume of a Level 1 unit of measure x Percentage Filled

## Appendix A — Functional Servers

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Several J.D. Edwards programs access functional servers. The purpose of functional servers is to provide a central location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. These business rules establish the following:

- Data dictionary default values
- Field edits and valid values
- Error processing
- Relationships between fields or applications

The advantages of a functional server are:

- It reduces maintenance of entry programs because edit rules reside in one central location.
- You can standardize documents across all applications because you create them using the same business rules.
- Generally, the user interface (appearance and interaction) of a form is now separate from how a program works.

The steps for setting up business rules for an entry program are:

1. Create a DREAM Writer version for a specific functional server program (for example, XT0411Z1 for voucher entry).
2. Set the processing options within the version according to your company requirements.
3. Specify the version you want the entry program to use in the processing options for that entry program.

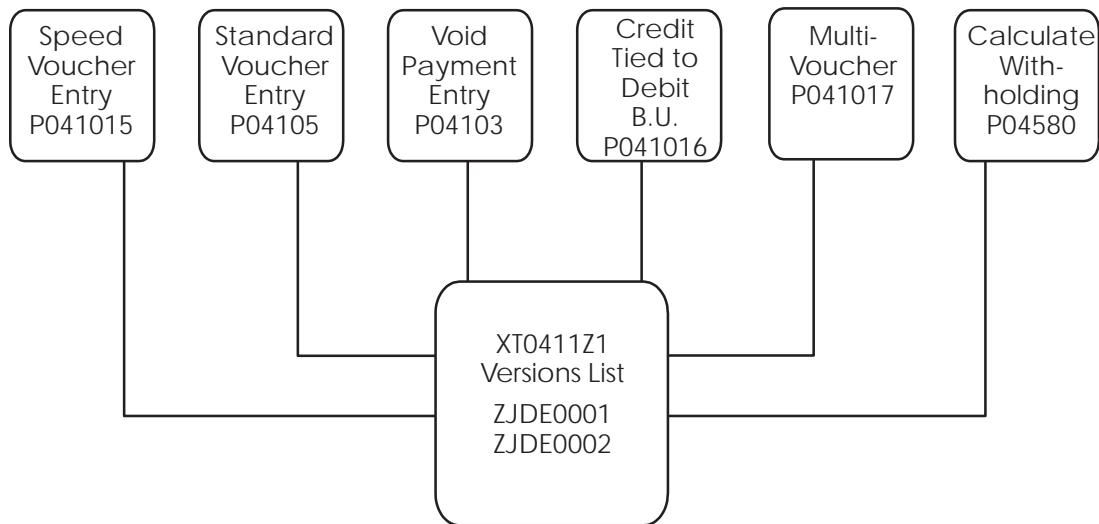
You can have all your entry programs use the same DREAM Writer version (and thus, use the same rules) or you can set up different DREAM Writer versions. J.D. Edwards provides DREAM Writer version ZJDE0001 as the default functional server version for your entry programs.



Only the person responsible for system-wide setup should make changes to the functional server version. For more information about how to set up DREAM Writer versions, see the *Technical Foundation Guide*.

### Example: Voucher Processing Functional Server

The following graphic shows the programs that use the voucher processing functional server. J.D. Edwards provides two demo versions of the functional server, ZJDE0001 and ZJDE0002.



# Glossary



# Glossary

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This glossary defines terms in the context of your use of JDE systems and the accompanying user guide.

**access.** To get to the information or functions provided by the system through menus, screens, and reports.

**alphabetic character.** Represents data by using letters and other symbols from the keyboard (such as \*#). Contrast with *numeric character*.

**alphanumeric character.** Represents data in a combination of letters, numbers, and other symbols (such as \*#).

**audit trail.** The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records, and usually concludes with a report.

## **automatic accounting instruction (AAI).**

A code that points to an account in the chart of accounts. AAIs define rules for programs that automatically generate journal entries. This includes interfaces between Accounts Payable, Accounts Receivable, and Financial Reporting and the General Accounting system. Each system that interfaces with the General Accounting system has AAIs. For example, AAIs can direct the Post to General Ledger program to post a debit to a certain expense account and an automatic credit to a certain accounts payable account.

**backup copy.** A copy of original data preserved on a magnetic tape or diskette as protection against destruction or loss.

**batch.** A group of like records or transactions that the computer treats as a single unit during processing. For identification purposes, the system usually assigns each batch a unique identifier, known as a "batch number."

**batch header.** Information the computer uses as identification and control for a group of transactions or records in a batch.

**batch job.** A task or group of tasks you submit for processing that the system treats as a single unit during processing, for example, printing reports and purging files. The computer performs these tasks with little or no user interaction.

**batch processing.** A method by which the computer selects jobs from the job queue, processes them, and writes output to the outqueue. Contrast with *interactive processing*.

**batch type.** A code that designates which JDE system the associated transactions pertain to, thus controlling what records are selected for processing. For example, in the Post General Journal process, only unposted transaction batches with a batch type of G for General Accounting are selected for posting.

**Boolean logic operand.** In JDE's DREAM Writer, the parameter of the Relationship field. The Boolean logic operand tells the system to perform a comparison between certain records or parameters. Available operands are:

EQ	= Equal To
LT	= Less Than
LE	= Less Than or Equal To
GT	= Greater Than
GE	= Greater Than or Equal To
NE	= Not Equal To
NL	= Not Less Than
NG	= Not Greater Than

**CAD/CAP.** Computer Assisted Design/Computer Assisted Programming. A set of automated programming tools for designing and developing systems. These tools automate system design, generate source

code and documentation, enforce design standards, and help to ensure consistency throughout all JDE systems.

**category code.** In user defined codes, a temporary title for an undefined category. For example, if you are adding a code that designates different sales regions, you could change *category code 4* to *Sales Region*, and define E (East), W (West), N (North), and S (South) as the valid codes. Category codes were formerly known as *reporting codes*.

**character.** Any letter, number, or other symbol that a computer can read, write, and store.

**command.** A character, word, phrase, or combination of keys you use to tell the computer to perform a defined activity.

**constants.** Parameters or codes that rarely change. The computer uses constants to standardize information processing by an associated system. Some examples of constants are allowing or disallowing out-of-balance postings and having the system perform currency conversions on all amounts. Once you set constants such as these, the system follows these rules until you change the constants.

**Core.** The central and foundational systems of JDE software, including General Accounting, Accounts Payable, Accounts Receivable, Address Book, Financial Reporting, Financial Modeling and Allocations, and Back Office.

**cursor.** The blinking underscore or rectangle on your screen that indicates where the next keystroke will appear.

**cursor sensitive help.** JDE's online help function, which allows you to view a description of a field, an explanation of its purpose, and, when applicable, a list of the valid codes you can enter. To access this information, move the cursor to the field and press F1.

**data.** Numbers, letters, or symbols that represent facts, definitions, conditions, and situations, that a computer can read, write, and store.

**database.** A continuously updated collection of all information a system uses and stores. Databases make it possible to create, store, index, and cross-reference information online.

**data dictionary.** A database file consisting of the definitions, structures, and guidelines for the usage of fields, messages, and help text. The data dictionary file does not contain the actual data itself.

**default.** A code, number, or parameter the system supplies when you do not enter one. For example, if an input field's default is N and you do not enter something in that field, the system supplies an N.

**descriptive title.** See *user defined code*.

**detail.** The individual pieces of information and data that make up a record or transaction. Contrast with *summary*.

**display.** (1) To cause the computer to show information on a terminal's screen. (2) A specific set of fields and information that a JDE system might show on a screen. Some screens can show more than one display when you press a specified function key.

**display field.** A field of information on a screen that contains a system-provided code or parameter that you cannot change. Contrast with *input field*.

**DREAM Writer.** Data Record Extraction And Management Writer. A flexible data manipulator and cataloging tool. You use this tool to select and sequence the data that is to appear on a programmed report.

**edit.** (1) To make changes to a file by adding, changing, or removing information. (2) The program function of highlighting fields into which you have entered inadequate or incorrect data.

**execute.** See *run*.

**exit.** (1) To interrupt or leave a computer program by pressing a specific key or a sequence of keys.

(2) An option or function key displayed on a screen that allows you to access another screen.

**facility.** A collection of computer language statements or programs that provides a specialized function throughout a system or throughout all integrated systems. Some examples DREAM Writer and FASTR.

**FASTR.** Financial Analysis Spreadsheet Tool and Report Writer. A report writer that allows you to design your own report specifications using the general ledger database.

**field.** (1) An area on a screen that represents a particular type of information, such as name, document type, or amount. Fields that you can enter data into are designated with underscores. See *input field* and *display field*. (2) A defined area within a record that contains a specific piece of information. For example, a vendor record consists of the fields Vendor Name, Address, and Telephone Number. The Vendor Name field contains just the name of the vendor.

**file.** A collection of related data records organized for a specific use and electronically stored by the computer.

**fold area.** An area of a screen, accessed by pressing F4, that displays additional information associated with the records or data items displayed on the screen.

**function.** A separate feature within a facility that allows you to perform a specific task, for example, the field help function.

**function key.** A key you press to perform a system operation or action. For example, you press F4 to have the system display the fold area of a screen.

**hard copy.** A presentation of computer information printed on paper. Synonymous with *printout*.

**header.** Information at the beginning of a file. This information is used to identify or provide control information for the group of records that follows.

**help instructions.** Online documentation or explanations of fields that you access by pressing the Help key or by pressing F1 with your cursor in a particular field.

**helps.** See *help instructions*.

**hidden selections.** Menu selections you cannot see until you enter HS in a menu's Selection field. Although you cannot see these selections, they are available from any menu. They include such items as Display Submitted Jobs (33), Display User Job Queue (42), and Display User Print Queue (43). The Hidden Selections window displays three categories of selections: user tools, operator tools, and programmer tools.

**input.** Information you enter in the input fields on a screen or that the computer enters from other programs, then edits and stores in files.

**input field.** An area on a screen, distinguished by underscores ( \_\_ ), where you type data, values, or characters. A field represents a specific type of information such as name, document type, or amount. Contrast with *display field*.

**install system code.** The code that identifies a JDE system. Examples are 01 for the Address Book system, 04 for the Accounts Payable system, and 09 for the General Accounting system.

**interactive processing.** A job the computer performs in response to commands you enter from a terminal. During interactive processing, you are in direct communication with the computer, and it might prompt you for additional information during the processing of your request. See *online*. Contrast with *batch processing*.

**interface.** A link between two or more JDE systems that allows these systems to send information to and receive information from one another.

**jargon.** A JDE term for system specific help text. You base your help text on a specific reporting code you designate in the Data Dictionary Glossary. You can display this text as part of online help.

**job.** A single identifiable set of processing actions you tell the computer to perform. You start jobs by choosing menu selections, entering commands, or pressing designated function keys. An example of a computer job is check printing in the Accounts Payable system.

**job queue.** A screen that lists the batch jobs you and others have told the computer to process. When the computer completes a job, the system removes the job's identifier from the list.

**justify.** To shift information you enter in an input field to the right or left side of the field. Many of the facilities within JDE systems justify information. The system does this only after you press Enter.

**key field.** A field common to each record in a file. The system uses the key field designated by the program to organize and retrieve information from the file.

**Key General Ledger Account (Key G/L).** See *automatic accounting instructions*.

**leading zeros.** A series of zeros that certain facilities in JDE systems place in front of a value you enter. This normally occurs when you enter a value that is smaller than the specified length of the field. For example, if you enter 4567 in a field that accommodates eight numbers, the facility places four zeros in front of the four numbers you enter. The result would look like this: 00004567.

**level of detail.** (1) The degree of difficulty of a menu in JDE software. The levels of detail for menus are as follows:

A=Major Product Directories

B=Product Groups

1=Basic Operations

2=Intermediate Operations

3=Advanced Operations

4=Computer Operations

5=Programmers

6=Advanced Programmers

Also known as *menu levels*.

(2) The degree to which account information in the General Accounting system is summarized. The highest level of detail is 1 (least detailed) and the lowest level of detail is 9 (most detailed).

**master file.** A computer file that a system uses to store data and information which is permanent and necessary to the system's operation. Master files might contain data or information such as paid tax amounts and vendor names and addresses.

**menu.** A screen that displays numbered selections. Each of these selections represents a program. To access a selection from a menu, type the selection number and then press Enter.

**menu levels.** See *level of detail*.

**menu masking.** A security feature of JDE systems that lets you prevent individual users from accessing specified menus or menu selections. The system does not display the menus or menu selections to unauthorized users.

**menu message.** Text that appears on a screen after you make a menu selection. It displays a warning, caution, or information about the requested selection.

**next number facility.** A JDE software facility you use to control the automatic numbering of such items as new G/L accounts, vouchers, and addresses. It lets you specify your desired numbering system

and provides a method to increment numbers to reduce transposition and typing errors.

**numeric character.** Represents data using the numbers 0 through 9. Contrast with *alphabetic character* and *alphanumeric character*.

**offline.** Computer functions that are not under the continuous control of the system. For example, if you were to run a certain job on a personal computer and then transfer the results to a host computer, that job would be considered an offline function. Contrast with *online*.

**online.** Computer functions over which the system has continuous control. Each time you work with a JDE system-provided screen, you are online with the system. Contrast with *offline*. See *interactive processing*.

**online information.** Information the system retrieves, usually at your request, and immediately displays on the screen. This information includes items such as database information, documentation, and messages.

**operand.** See *Boolean logic operand*.

**option.** A numbered selection from a JDE screen that performs a particular function or task. To select an option, you enter its number in the Option field next to the item you want the function performed on. When available, for example, option 4 allows you to return to a prior screen with a value from the current screen.

**output.** Information the computer transfers from internal storage to an external device, such as a printer or a computer screen.

**output queue.** A screen that lists the spooled files (reports) you have told the computer to write to an output device, such as a printer. After the computer writes a file, the system removes that file's identifier from the online list.

**override.** The process of entering a code or parameter other than the one provided by the system. Many JDE systems offer screens that provide default field values when they appear. By typing a new value over the default code, you can *override* the default. See *default*.

**parameter.** A number, code, or character string you specify in association with a command or program. The computer uses parameters as additional input or to control the actions of the command or program.

**password.** A unique group of characters that you enter when you sign on to the system that the computer uses to identify you as a valid user.

**printout.** A presentation of computer information printed on paper. Synonymous with *hard copy*.

**print queue.** An online list (screen) of written files that you have told the computer to print. Once the computer prints the file, the system removes the file's identifier from the online list. See *output queue*.

**processing options.** A feature of the JDE DREAM Writer that allows you to supply parameters to direct the functions of a program. For example, processing options allow you to specify defaults for certain screen displays, control the format in which information gets printed on reports, change the way a screen displays information, and enter "as of" dates.

**program.** A collection of computer statements that tells the computer to perform a specific task or group of tasks.

**program specific help text.** Glossary text that describes the function of a field within the context of the program.

**prompt.** (1) A reminder or request for information displayed by the system. When a prompt appears, you must respond in order to proceed. (2) A list of codes or parameters or a request for information

provided by the system as a reminder of the type of information you should enter or action you should take.

**PTF.** Program Temporary Fix. A representation of changes to JDE software, which your organization receives on magnetic tapes or diskettes.

**purge.** The process of removing records or data from a system file.

**record.** A collection of related, consecutive fields of data the system treats as a single unit of information. For example, a vendor record consists of information such as the vendor's name, address, and telephone number.

**reporting code.** See *category code*.

**reverse image.** Screen text that displays in the opposite color combination of characters and background from what the screen typically displays (for example, black on green instead of green on black).

**run.** To cause the computer to perform a routine, process a batch of transactions, or carry out computer program instructions.

**scroll.** To use the roll keys to move screen information up or down a screen at a time. When you press the Rollup key, for instance, the system replaces the currently displayed text with the next screen of text if more text is available.

**selection.** Found on JDE menus, selections represent functions that you can access from a given menu. To make a selection, you type its associated number in the Selection field and press Enter.

**softcoding.** A JDE term that describes an entire family of features that allows you to customize and adapt JDE software to your business environment. These features lessen the need for you to use computer programmers when your data processing needs change.

**software.** The operating system and application programs that tell the computer how and what tasks to perform.

**special character.** Representation of data in symbols that are neither letters nor numbers. Some examples are \* & # /.

**spool.** The function by which the system puts generated output into a storage area to await printing and processing.

**spooled file.** A holding file for output data waiting to be printed or input data waiting to be processed.

**subfile.** An area on the screen where the system displays detailed information related to the header information at the top of the screen. Subfiles might contain more information than the screen can display in the subfile area. If so, use the roll keys to display the next screen of information. See *scroll*.

**submit.** See *run*.

**summary.** The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many of the JDE systems offer screens and reports that are summaries of the information stored in certain files.

**system.** A collection of computer programs that allows you to perform specific business tasks. Some examples of applications are Accounts Payable, Inventory, and Order Processing. Synonymous with *application*.

**user defined code.** The individual codes you create and define within a user defined code type. Code types are used by programs to edit data and allow only defined codes. These codes might consist of a single character or a set of characters that represents a word, phrase, or definition. These characters can be alphabetic, alphanumeric, or numeric. For example, in the user defined code type table ST (Search Type), a few codes are C for Customers, E for Employees, and V for Vendors.

**user defined code (type).** The identifier for a table of codes with a meaning you define for the system (for example, ST for the Search Type codes table in Address

Book). JDE systems provide a number of these tables and allow you to create and define tables of your own. User defined codes were formerly known as *descriptive titles*.

**user identification (user ID).** The unique name you enter when you sign on to a JDE system to identify yourself to the system. This ID can be up to 10 characters long and can consist of alphabetic, alphanumeric, and numeric characters.

**valid codes.** The allowed codes, amounts, or types of data that you can enter in a specific input field. The system checks, or edits, user defined code fields for accuracy against the list of valid codes.

**video.** The display of information on your monitor screen. Normally referred to as the *screen*.

**vocabulary overrides.** A JDE facility that allows you to override field, row, or column title text on a screen-by-screen or report-by-report basis.

**window.** A software feature that allows a part of your screen to function as if it were a screen in itself. Windows serve a dedicated purpose within a facility, such as searching for a specific valid code for a field.



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