

**Manager Reference: Facility**



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## **.1 Main**

The Main tab for this facility is not currently active.

### **.1.1 View Calendar link button**

[View Calendar] when encountered in this application takes you to the WorkEffort Manager application calendar.

## .2 Facilities

### .2.1 Introduction

#### .2.1.1 Basic unit of the business

The facility is the basic unit of the business. It controls a range of things. Particularly Inventory configuration which is then per catalog. We only support one <U> inventory facility </U> at this time. You must create a 'Facility' in which to hold inventory before you can record and adjust inventory levels properly. This will be referenced in the Catalog build and can be added at any time.

#### .2.1.2 Begin your business

The first thing to create is a Facility (as this is where the products will be drawn from). As each Facility is created, it will appear in the Facilities List Table which is like an index, presented by default upon opening the Facility Manager. <p> Note that there will be more than one Facility in most cases. One might be your virtual store, the e-commerce website where product info is presented and customers make their purchases. Another might be your warehouse/shipping facility where products are received, inventoried and shipped out. Another could be your physical administration offices where employees maintain the business. All are established (for the sake of relationships and functions) electronically here through the Facility Manager.

#### .2.1.3 Facilities List table

##### .2.1.3.1 main

id:[DOCFAC2093] image:

The screenshot shows the 'Facility Manager Application' interface. At the top left is the 'OPEN FOR BUSINESS OFBiz.org' logo. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the date '2006-04-28 11:56:54.469' and a language dropdown set to 'English (United States)' with a 'Set' button. Below this is a navigation bar with tabs: Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, WorkEffort. The main content area has a blue header 'Facility Manager Application' and sub-tabs: Main, Facilities (selected), Facility Groups, Shipments, and Logout. The 'Facilities List' section includes a 'Create New Facility' button and a table with the following data:

Facility Name [ID]	Facility Type	Owner	SqFt	Description	
Web Store Warehouse <a href="#">WebStoreWarehouse</a>	Warehouse	Company		Warehouse exclusively for the Web Store	<a href="#">Edit</a>
My Retail Store <a href="#">MyRetailStore</a>	Retail Store	Company		Example Retail (POS) Store	<a href="#">Edit</a>

At the bottom of the interface, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

The Main tab or opening screen in the Facility Manager takes you to this Facilities List. Click on an [ID] or on [Edit].

##### .2.1.3.2 link buttons

[Create New Facility] [Edit]

##### .2.1.3.3 Facility Name / ID

Click on the associated [Edit] link button or on the (ID) of the facility within the table to be taken directly to the Edit screen populated with data about that facility.



### .2.1.3.4 Facility Type

Is the Facility a Warehouse, a Retail Store, a Hotel, a Rental Agency, etc.

### .2.1.3.5 Owner

Who 'owns' the Facility. This would typically be a matter of responsibility rather than financial possession. For example, assume that those responsible for handling the computers and all electronic aspects of the ecommerce business had their own building and organization. This WebSite processing unit could be 'owned' by the IT Department, while the Warehouse Facility and the Retail Store would each be a top-level entity under the Company itself.

### .2.1.3.6 SqFt

How large in floor surface area is the physical facility itself.

### .2.1.3.7 Description

What is the purpose, function or activity of this facility?

## .2.2 Create a New Facility

### .2.2.1 EditFacility-New

id:[DOCFAC2102] image:

The screenshot shows the 'Facility Manager Application' interface. At the top left is the 'OPEN FOR BUSINESS OFBiz.org' logo. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the date '2006-04-28 12:50:45.953' and a language dropdown set to 'English (United States)' with a 'Set' button. Below this is a navigation bar with tabs: Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. The main content area has a blue header 'Facility Manager Application' and sub-tabs: Main, Facilities (selected), Facility Groups, and Shipments. A 'Logout' link is in the top right of the main area. The 'Facilities' sub-tab shows a form for 'Facility [ID:]' with a 'New Facility' link. The form fields are: Facility Type ID (Call Center), Owner (SALES), Default Weight Unit (None), Default Inventory Item Type (Non-Serialized), Name (Catch the Calls), Square Footage (3500), and Description (Modern computer-intensive phone and e-commerce processor). An 'Update' button is at the bottom of the form. Below the form are logos for W3C CSS and W3C XHTML 1.0. At the bottom, it says 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

Creating a new Facility. The name will be associated with a numerical ID; a different name can be edited in later, if needed.

### .2.2.2 link buttons

[New Facility] [Update]

### .2.2.3 First step - identify a Facility

Select the type of Facility, give it a name, declare the owner and the Default Inventory Type, specify the amount of area (in square feet at the moment) and give it a description. The only mandatory fields here are the Facility Type and Name. <br> Once you have pressed [Update] you are taken to the Facilities tab with the newly-created Facility ready to edit in the Edit Facility screen.

#### **.2.2.4 Facility Type ID (drop-down box)**

Types of Facility might include: <P><B> --- <br> Building <br> Floor <br> Office <br> Call Center <br> Plant <br> Room <br> Retail Store <br> Warehouse</B>

#### **.2.2.5 Owner (drop-down box)**

Select the Owner from the drop-down box. Typical choices might be: <B><P> ---- <br> MARKETING <br> ACCOUNTING <br> SALES <br> DEV <br> TESTING <br> Company</B>

#### **.2.2.6 Default Weight Unit (drop-down box)**

If needed, specify the weight unit inventory might be measured in. For example, if the facility is a sand and gravel producer, you could specify pounds or tons.

#### **.2.2.7 Default Inventory Item Type (drop-down box)**

Selections might include: <br><B> Serialized <br> Non-Serialized </B>

#### **.2.2.8 Name**

Whatever name you place here does NOT become the Facility ID; that is created by the system. You can edit this Name later and give the store another name.

#### **.2.2.9 Square Footage**

What is the floor area of the facility?

#### **.2.2.10 Description**

Explain the purpose, function or role of this Facility.

### **.2.3 Facility tab**

#### **.2.3.1 EditFacility**



**Facility Manager Application**

Main Facilities Facility Groups Shipments Reports Logout

Facility ContactMechs Groups Locations Roles Inventory Inventory Receive Inventory Xfers Receive Return Picking Packing

Scheduling Incoming Shipments Outgoing Shipments

**Facility Catch the Calls [ID:10000]**

New Facility View Calendar

Facility ID **10000** (This cannot be changed without re-creating the facility.)

Facility Type ID Call Center

Owner SALES

Default Weight Unit None

Default Inventory Item Type Non-Serialized

Name Catch the Calls

Square Footage 3,500

Description Modern computer-intensive phone and e-commerce processor

Update

W3C CSS W3C XHTML 1.0

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Powered By OFBiz

Upon creating a new Facility or selecting an existing one, you come to this screen. Each sub-tab carries through the selected ID.

### .2.3.2 link buttons

[New Facility] [View Calendar] [Update] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.3.3 Facility ID

This is the ID by which the facility is managed within OFBiz. The ID was established in the Create New screen; it cannot be changed. You can name the facility whatever you wish and change that as needed in the Name field.

### .2.3.4 Facility Type ID (drop-down box)

Types of Facility might include: <br><B> --- <br> Building <br> Floor <br> Office <br> Call Center <br> Plant <br> Room <br> Retail Store <br> Warehouse</B>

### .2.3.5 Owner (drop-down box)

This would identify the Party or Party Group having management or fiduciary responsibility for the Facility. Assign the Owner from the drop-down box. Typical choices might be: <B><br> ---- <br> MARKETING <br> ACCOUNTING <br> SALES <br> DEV <br> TESTING <br> Company </B>

### .2.3.6 Default Weight Unit (drop-down box)

If a weight unit type needs to be specified for this Facility, it will be done here.

### .2.3.7 Default Inventory Item Type (drop-down box)

For example, Serialized or Non-Serialized items to be maintained in the warehouse.

### **.2.3.8 Name**

You can change the Name here at any time.

### **.2.3.9 Square Footage**

Size of the floor area.

### **.2.3.10 Description**

Explain the purpose, function or role of this Facility.

### **.2.3.11 View Calendar link**

#### **.2.3.11.1 Discussion**

Clicking on the [View Calendar] link button takes you to the WorkEffort Manager >> Calendar tab with your default presentation of the Month view.

#### **.2.3.11.2 View Calendar**



WorkEffort Manager Application

By Party:

By Facility:

By Fixed Asset:

Calendar Month View

April 2006

[Previous Month](#) | [Next Month](#) | [This Month](#)

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Week 13	26 <a href="#">Add New</a>	27 <a href="#">Add New</a>	28 <a href="#">Add New</a>	29 <a href="#">Add New</a>	30 <a href="#">Add New</a>	31 <a href="#">Add New</a>	1 <a href="#">Add New</a>
Week 14	2 <a href="#">Add New</a>	3 <a href="#">Add New</a>	4 <a href="#">Add New</a>	5 <a href="#">Add New</a>	6 <a href="#">Add New</a>	7 <a href="#">Add New</a>	8 <a href="#">Add New</a>
Week 15	9 <a href="#">Add New</a>	10 <a href="#">Add New</a>	11 <a href="#">Add New</a>	12 <a href="#">Add New</a>	13 <a href="#">Add New</a>	14 <a href="#">Add New</a>	15 <a href="#">Add New</a>
Week 16	16 <a href="#">Add New</a>	17 <a href="#">Add New</a>	18 <a href="#">Add New</a>	19 <a href="#">Add New</a>	20 <a href="#">Add New</a>	21 <a href="#">Add New</a>	22 <a href="#">Add New</a>
Week 17	23 <a href="#">Add New</a>	24 <a href="#">Add New</a>	25 <a href="#">Add New</a>	26 <a href="#">Add New</a>	27 <a href="#">Add New</a>	28 <a href="#">Add New</a>	29 <a href="#">Add New</a>
Week 18	30 <a href="#">Add New</a>						



[View Calendar] takes you to the current Month view of the Calendar for this Facility under the Work Effort Manager.

## .2.4 ContactMechs tab

### .2.4.1 New Contact Mechanism

#### .2.4.1.1 EditContactMech-new



Facility Manager Application

Main Facilities Facility Groups Shipments Reports Logout

Facility **ContactMechs** Groups Locations Roles Inventory Inventory Receive Inventory Xfers Receive Return Picking Packing  
Scheduling Incoming Shipments Outgoing Shipments

Create New Contact Information

Select Contact Type:



When creating a new Contact Mechanism, start here with the choice of types of Contact Mechs; then proceed with [Create].

**.2.4.1.2 link buttons**

[Go Back] [Create] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

**.2.4.1.3 Select Contact Type: (drop-down box)**

**.2.4.1.3.1 Choices**

These choices can be selected:<B><p> Electronic Address<br> Postal Address<br> Phone Number<br> Email Address<br> Internet IP Address<br> Internet Domain Name<br> Web URL/Address</B>

**.2.4.1.3.2 Process**

Choose the Type you are associating with this Facility. Note that by repeated processing, you can have one or more Contact Mechanisms of any or all types for your facility. When you click on [Create] you are presented with the screen appropriate to your choice. Each screen is discussed below.

**.2.4.1.4 Electronic Address**

**.2.4.1.4.1 EditContactMech-newElect**



Welcome THE ADMINISTRATOR!  
2005-10-10 14:15:59.342

English (United States)

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

Facility Manager Application

Main Facilities Facility Groups Shipments Logout

Facility **ContactMechs** Groups Locations Roles Inventory Items Inventory Receive Inventory Xfers Receive Return Picking Packing  
Incoming Shipments Outgoing Shipments

Create New Contact Information

Electronic Address  \*



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Powered By OFBiz

Tool for creating a new Electronic Address contact mechanism.

**.2.4.1.4.2 link buttons**

[Go Back] [Save] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]</B>

**.2.4.1.4.3 Electronic Address \***

Enter the new Electronic Address, then press [Save].

**.2.4.1.5 Postal Address**

**.2.4.1.5.1 EditContactMech-newPostAddr**



Create New Contact Information

[Go Back] [Save]

To Name

Attention Name

Address Line 1  \*

Address Line 2

City  \*

State/Province  \*

Zip/Postal Code  \*

Country  \*

[Go Back] [Save]



Create a new Postal Address contact mechanism for your Facility. Purpose is added after saving.

**.2.4.1.5.2 link buttons**

[Go Back] [Save] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]</B>

**.2.4.1.5.3 To Name**

Name of the Facility, organization or group.

**.2.4.1.5.4 Attention Name**

Where the mail should be routed within the facility.

**.2.4.1.5.5 Address Line 1 \***

The first line of the Postal delivery address.

**.2.4.1.5.6 Address Line 2**

The second line of the Postal delivery address.

**.2.4.1.5.7 City \***

The community, city, town or geographical center for this Postal address.

**.2.4.1.5.8 State/Province (drop-down box) \***

The state or province or greater regional area of the address.

**.2.4.1.5.9 Zip/Postal Code \***



Enter the Postal code; this is a required field.

**.2.4.1.5.10 Country (drop-down box) \***

Select the country from the drop-down box.

**.2.4.1.5.11 Add Contact Purposes**

Upon pressing [Save] you will be presented with the following screen requesting the purposes for which postal contact may be made.

.2.4.1.5.11.1 createFacilityContactMechPurpose-PostAddr

id:[DOCFAC2162] image:



Welcome THE ADMINISTRATOR!  
2005-10-10 16:30:24.748

English (United States) Set

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

Facility Manager Application  
Main Facilities Facility Groups Shipments Logout

The Following Occurred:

- The action was performed successfully.

Facility ContactMechs Groups Locations Roles Inventory Items Inventory Receive Inventory Xfers Receive Return Picking  
Packing Incoming Shipments Outgoing Shipments

Edit Contact Information

[Go Back] [Save]

Contact Purposes	General Correspondence Address (Since:2005-10-10 16:30:24.467)	Delete	
	Primary Address (Since:2005-10-10 16:28:32.936)	Delete	
	<input type="text"/>	Add Purpose	

To Name

Attention Name

Address Line 1  \*

Address Line 2

City  \*

State/Province  \*

Zip/Postal Code  \*

Country  \*

[Go Back] [Save]



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Powered By OFBiz

Add the Contact Purposes to your Postal Address record here. You can also update the other information at the same screen.

.2.4.1.5.11.2 link buttons

[Add Purpose] [Delete] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]</B>

.2.4.1.5.11.3 Contact Purposes (drop-down box)

Purposes might include one of the following: <B> <p> Billing (AP) Address <br> General Correspondence Address <br> Payment (AR) Address <br> Purchase Return Address <br> Shipping Destination Address <br> Shipping Origin Address</B>

### .2.4.1.6 Phone Number

#### .2.4.1.6.1 EditContactMech-newPhonNum

id:[DOCFAC2145] image:

The screenshot shows the 'Facility Manager Application' interface. At the top, there is a navigation menu with tabs for Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. A user greeting 'Welcome THE ADMINISTRATOR!' and the date '2005-10-10 17:35:34.436' are visible. A language dropdown is set to 'English (United States)'. The main content area is titled 'Facility Manager Application' and includes sub-tabs for Main, Facilities, Facility Groups, and Shipments. A secondary menu contains buttons for Facility, ContactMechs (selected), Groups, Locations, Roles, Inventory Items, Inventory Receive, Inventory Xfers, Receive Return, Picking, and Packing. Below this, there are buttons for Incoming Shipments and Outgoing Shipments. The 'Create New Contact Information' section features a form with fields for Phone Number, Country Code, Area Code, Contact Number, and Extension. The form is pre-filled with '303' for the Area Code and '456-7891' for the Contact Number. There are 'Go Back' and 'Save' buttons. At the bottom, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice for 2001-2005 The Open For Business Project.

Creating a new Phone Number record; NOTE: the first box is for the Country code, NOT the Area Code.

#### .2.4.1.6.2 link buttons

[Go Back] [Save] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]</B>

#### .2.4.1.6.3 Phone Number \*

Important Note: The first box is for the COUNTRY code, NOT for the Area Code - that goes into the next box. Place all the primary (7) digits into the 3rd box, including the prefix. <P> The Contact Purpose will be established in the next screen after you [Save] this new phone number.

#### .2.4.1.6.4 Add Contact Purposes

Upon pressing [Save] you will be presented with the following screen requesting the purposes for which telephone contact may be made.

##### .2.4.1.6.4.1 createTelecomNumber-addPurposes



**Facility Manager Application**

Main Facilities Facility Groups Shipments Logout

The Following Occurred:

- The action was performed successfully.

[Facility](#) [ContactMechs](#) [Groups](#) [Locations](#) [Roles](#) [Inventory Items](#) [Inventory Receive](#) [Inventory Xfers](#) [Receive Return](#) [Picking](#)  
[Packing](#) [Incoming Shipments](#) [Outgoing Shipments](#)

**Edit Contact Information**

[Go Back](#) [Save](#)

Contact Purposes **Primary Phone Number** (Since:2005-10-10 17:39:46.389) [Delete](#)

Billing (AP) Phone Number [Add Purpose](#)

Phone Number  - 303 - 456-7891 ext

[Country Code] [Area Code] [Contact Number] [Extension]

[Go Back](#) [Save](#)



Part of creating the Phone Number contact - specifying the Contact Purpose(s) from the drop-down box.

.2.4.1.6.4.2 link buttons

[Add Purpose] [Go Back] [Save] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Incoming Shipments] [Outgoing Shipments]</B>

.2.4.1.6.4.3 Contact Purposes (drop-down box)

Purposes could be one of the following: <B> <p> Main Fax Number <br> Secondary Fax Number <br> Billing (AP) Phone Number <br> Main Home Phone Number <br> Main Mobile Phone Number <br> Payment (AR) Phone Number <br> Shipping Destination Phone Number <br> Shipping Origin Phone Number <br> Main Work Phone Number <br> Secondary Work Phone Number <br> Primary Phone Number</B>

**.2.4.1.7 Email Address**

**.2.4.1.7.1 EditContactMech-newEmail**



Facility Manager Application

Create New Contact Information

E-Mail Address  \*



Create the mechanism for e-mail contact at this screen.

**.2.4.1.7.2 link buttons**

[Go Back] [Save] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]</B>

**.2.4.1.7.3 E-Mail Address \***

Enter the complete e-mail address here.

**.2.4.1.7.4 Contact Purposes**

Upon creation of the new E-Mail contact record, a query window appears asking for the Purpose of the email address with a drop-down box from which to select.

.2.4.1.7.4.1 createEMailContactMech-addPurpose



**Facility Manager Application**

Main Facilities Facility Groups Shipments Logout

The Following Occurred:

- The action was performed successfully.

Edit Contact Information

Contact Purposes	Order Notification Email Address (Since:2005-10-10 17:52:43.139)	Delete <input type="checkbox"/>
	<input type="text"/>	Add Purpose

E-Mail Address  \*



Add the Purpose for the e-mail contact mechanism at this screen.

.2.4.1.7.4.2 link buttons

[Delete] [Add Purpose] [Go Back] [Save] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]</B>

.2.4.1.7.4.3 Contact Purposes (drop-down box)

Possible purposes for the email contact might be: <B><P> Order Notification Email Address <br> Other Email Address <br> Primary Email Address </B>

**.2.4.1.8 Internet IP Address**

**.2.4.1.8.1 EditContactMech-newInternetIPAdd**



Facility Manager Application

Main Facilities Facility Groups Shipments Logout

Facility **ContactMechs** Groups Locations Roles Inventory Items Inventory Receive Inventory Xfers Receive Return Picking Packing  
Incoming Shipments Outgoing Shipments

Create New Contact Information

[Go Back] [Save]

Internet IP Address  \*

[Go Back] [Save]



Create a new Internet IP Address contact record here.

**.2.4.1.8.2 link buttons**

[Go Back] [Save] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]</B>

**.2.4.1.8.3 Internet IP Address \***

Enter this accurately and correctly. Do NOT use asterisks (\*) as shown in the screen shot.

**.2.4.1.9 Internet Domain Name**

**.2.4.1.9.1 EditContactMech-newDomName**



Facility Manager Application

Create New Contact Information

Internet Domain Name  \*



Creating a new contact mechanism for the Internet Domain Name.

**.2.4.1.9.2 link buttons**

<B>

**.2.4.1.9.3 Internet Domain Name \***

Enter the full domain name including the extension.

**.2.4.1.10 Web URL/Address**

**.2.4.1.10.1 EditContactMech-newWebAdd**



Facility Manager Application

Create New Contact Information

Web URL/Address  \*



Create a new contact mechanism for the Web URL/ Address here. Enter the complete address.

**.2.4.1.10.2 link buttons**

[Go Back] [Save] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Incoming Shipments] [Outgoing Shipments]</B>

**.2.4.1.10.3 Web URL/Address \***

Enter the full address, including the http:// or the https:// portion.

**.2.4.2 View Contact Type Information**

The screen presents only the established Contact Mechanisms for the originally-selected Facility.

**.2.4.2.1 ViewContactMechs**





Facility Manager Application  
Main Facilities Facility Groups Shipments Logout

- Facility
- ContactMechs
- Groups
- Locations
- Roles
- Inventory Items
- Inventory Receive
- Inventory Xfers
- Receive Return
- Picking
- Packing
- Incoming Shipments
- Outgoing Shipments

Facility Catch the Calls [ID:10000]

- [New Facility]
- [View Calendar]
- [New Contact Mech]

Contact Type Information

<b>Postal Address</b>	<b>General Correspondence Address</b> <b>Primary Address</b> To: Catch The Calls Center Attn: Recruitment Team 2345 N. Broadway Suite 205 Commerce City, CO 80125 USA <a href="#">(lookup:whitepages.com)</a> (Updated: 2005-10-10 17:35:12.108)	[Update] [Expire]
<b>Phone Number</b>	<b>Primary Phone Number</b> 303-456-7891 <a href="#">(lookup:anywho.com)</a> <a href="#">(lookup:whitepages.com)</a> (Updated: 2005-10-10 17:39:30.326)	[Update] [Expire]
<b>Email Address</b>	<b>Primary Email Address</b> info@catch-the-calls.info <a href="#">(send email)</a> (Updated: 2005-10-10 17:46:36.545)	[Update] [Expire]
<b>Email Address</b>	<b>Order Notification Email Address</b> orders@open4commerce.com <a href="#">(send email)</a> (Updated: 2005-10-10 17:52:27.295)	[Update] [Expire]
<b>Internet IP Address</b>	1**,78.220.143 (Updated: 2005-10-10 20:37:24.186)	[Update] [Expire]
<b>Internet Domain Name</b>	OpenForYourBusiness.biz (Updated: 2005-10-10 20:40:58.748)	[Update] [Expire]



List of the existing Contact Mechanism records for the selected Facility. Click on the associated [Update] link to edit.

### .2.4.2.2 link buttons

[New Facility] [View Calendar] [New Contact Mech] [Update] [Expire] [(lookup:whitepages.com)] [(lookup:anywho.com)] [(send email)] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.4.2.3 Discussion

All the various contact mechanisms for the selected facility are presented in a list. Each one has the mechanism to [Update] or [Expire] the contact mechanism. 'Expire' removes them from the active list. 'Update' takes you to the editing screen for that particular contact; the contents of this screen are totally dependent upon the type of contact being edited. <p> See more details about contact mechanisms under the Party Manager.

### .2.4.3 Update Contact Mechanism

You are taken to a screen appropriate for editing the particular Contact selected. Screens are essentially the same as the Create New Contact Mechanism screens, discussed above.

## .2.5 Groups tab

### .2.5.1 Create New Facility Group

#### .2.5.1.1 createNewFacilityGroup-Step1

id:[14938] image:

The screenshot shows the 'Facility Manager Application' interface. At the top left is the 'OPEN FOR BUSINESS OFBiz.org' logo. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the date '2006-04-29 10:34:14.515' and a language dropdown set to 'English (United States)' with a 'Set' button. A navigation bar contains tabs for Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below this is a sub-navigation bar with 'Main', 'Facilities', 'Facility Groups', and 'Shipments'. The main content area has a title 'Facility Manager Application' and a sub-title 'Groups for Web Store Warehouse [ID:WebStoreWarehouse]'. It includes buttons for 'New Facility' and 'Active and Inactive'. A 'Group Member Maintenance' table has columns for 'Facility Group Name [ID]', 'From Date & Time', and 'Thru Date/Time & Sequence'. Below the table is an 'Add FacilityGroupMember:' section with a 'Facility Group ID' dropdown (set to 'Not Applicable'), a 'From Date' input field, and an 'Add' button. At the bottom, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A text box at the very bottom states: 'Before any Facility Group has been created, click on the [Add] button to start the creation process.'

#### .2.5.1.2 link buttons

[New Facility] [Active and Inactive (toggle)] [Add] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

#### .2.5.1.3 Discussion

At this point there are no Facility Groups. The Table is described below, under Edit Facility Groups. <P> To initiate any new Facility Group, click on the [Add] button. That will bring up the following screen where you will get one step closer to creating a new Facility Group.

#### .2.5.1.4 createNewFG-Step2



Facility Manager Application

- Facility
- ContactMechs
- Groups**
- Locations
- Roles
- Inventory
- Inventory Receive
- Inventory Xfers
- Receive Return
- Picking
- Packing
- Scheduling
- Incoming Shipments
- Outgoing Shipments

Groups for Web Store Warehouse [ID:WebStoreWarehouse]

- [New Facility]
- [Active and Inactive]

Group Member Maintenance

1 - 1 of 1

Facility Group Name [ID]	From Date & Time	Thru Date/Time & Sequence	
Not Applicable [_NA_]	2006-04-29 11:20:29.984	<input type="text"/> <input type="text"/>	[Delete]

1 - 1 of 1

Add FacilityGroupMember:

Facility Group ID:  From Date:



Step 2 is to click on the Facility Group ID that reads "Not Applicable" to bring up the Edit screen which follows.

### .2.5.1.5 Discussion 2

At this point you have added a Facility Group (which you can delete later) temporarily called Not Applicable. To enter the Edit Facility Group working screen, you need to edit a group. Therefore, we will 'Edit' this temporary 'Group' just to take us to that screen, shown below.

### .2.5.1.6 createNewFG-Step3



**Facility Manager Application**

Main Facilities Facility Groups Shipments Logout

Facility Group Rollups Facilities Roles

**Facility Group Not Applicable [ID:\_NA\_]**

[\[New Group\]](#)

Facility Group ID  This cannot be changed without re-creating the facility group

Facility Group Type

Primary Parent Group

Name

Description



At this screen you are still dealing with the temporary Group; click on [\[New Group\]](#) to continue.

### .2.5.1.7 Discussion 3

Notice that you are still working with 'Not Applicable' which is not really a Group. At this point you need to click the [\[New Group\]](#) link which will finally take you to the correct screen. <p> You will not need to take this complex path to create other Groups in the future. Once a group has been created for any particular Facility, you will only need to start editing an existing Group, and then click on the [\[New Group\]](#) link.

### .2.5.1.8 EditFacilityGroup-new



Facility Manager Application

Facility Group [ID:]

[New Group]

Facility Group Type

Primary Parent Group

Name

Description

Update



Here is where you actually create a new Facility Group. Select Type, give it a Name and a Description, then [Update].

**.2.5.1.9 link buttons**

[New Group] [Update]

**.2.5.1.10 Facility Group Type (drop-down box) \***

Required field; you cannot leave this blank. Select from one of the existing Types using the drop-down box.

**.2.5.1.11 Primary Parent Group (drop-down box)**

This box will be empty until after you have created your first Group; after that, all Groups will be listed, so you can assign the Parent if there is one.

**.2.5.1.12 Name**

This can be changed or edited later. Make it distinctive.

**.2.5.1.13 Description**

Provide a brief, succinct description to distinguish the Facility Group from others.

**.2.5.1.14 Final Step after Creating a Group**

Now you must return to the <B> Facilities </B> tab </> Groups </> sub-tab. That will bring you to the screen shown below under Group Member Maintenance where you will bring up and add the Groups you have just created here under the <B> Facility Groups </B> tab.

**.2.5.2 Group Member Maintenance**

**.2.5.2.1 Group Member Maintenance**

Only those Facility Groups which have already been associated with the selected Facility will be listed in the table. When you created a new Group (above), it was actually created under the Facility Groups tab. In the steps below we will bring those newly-created Groups under the Facility we are working with. <P> Clicking on the Facility Group

ID or the associated [Edit] button will take you to the major Facility Groups tab (discussed below) with its powerful editing tools. Keep an eye on which major Tab you are working with. If you no longer have the many sub-tabs shown across the upper main part of your screen, you might need to return to the <B> Facilities </B> working tab and (in the present case) the <l> Groups </l> sub-tab.

### .2.5.2.2 EditFacilityGroups

id:[10459] image:

The screenshot shows the 'Facility Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below this is a header for 'Facility Manager Application' with sub-tabs: Main, Facilities, Facility Groups (selected), Shipments, Reports, and Logout. A secondary navigation bar contains buttons for Facility, ContactMechs, Groups (selected), Locations, Roles, Inventory, Inventory Receive, Inventory Xfers, Receive Return, Picking, and Packing. Below this are buttons for Scheduling, Incoming Shipments, and Outgoing Shipments. The main content area is titled 'Groups for Catch the Calls [ID:10000]' and includes buttons for [New Facility] and [Active and Inactive]. Under 'Group Member Maintenance', there is a table with 4 rows and 4 columns. The table has columns for Facility Group Name [ID], From Date & Time, Thru Date/Time & Sequence, and an empty column. Each row contains a group name, a date-time stamp, a sequence number, and buttons for Update and Delete. Below the table is a form to 'Add FacilityGroupMember' with a dropdown for Facility Group ID (set to 'Call Center Employees') and a From Date field, followed by an Add button. At the bottom, there are W3C CSS and XHTML 1.0 logos, a copyright notice for 2001-2006 The Open For Business Project, and a footer box with the text: 'Create associations of existing Facility Groups with this Facility or select a Group to edit from this screen.'

Facility Group Name [ID]	From Date & Time	Thru Date/Time & Sequence	
Call Center Employees [10001]	2006-04-29 13:52:39.046	<input type="text"/> 1	[Update] [Delete]
Call Center Administration [10000]	2006-04-29 14:27:45.921	<input type="text"/> 2	[Update] [Delete]
Call Center Staff [10002]	2006-04-29 14:28:01.546	<input type="text"/> 3	[Update] [Delete]
Call Center Support Staff [10003]	2006-04-29 14:28:12.625	<input type="text"/> 4	[Update] [Delete]

### .2.5.2.3 link buttons

[New Facility] [Active and Inactive (toggle)] [Delete] [Update] [Add] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.5.2.4 Facility Group Name (ID)

A click on the Name [ID] takes you to the Facility Groups tab where you can make changes to this particular Group.

### .2.5.2.5 From Date and Time

When the association was created or made effective.

### .2.5.2.6 Thru Date/Time and Sequence

Use the popup calendar. Only specify a Date if you know the Association is to end (expire) at some point. Usually this field will be left blank.

### .2.5.2.7 Sequence

You must specify the Sequence Number if you wish to have a sequencing system among your Groups. Click [Update] if you have made any changes with a Group.

## .2.5.3 Add FacilityGroup Member

Tool for associating Facility Groups with the Facility. The Group must already exist; create new groups under the Facility Groups tab. Once created, they will appear under the drop-down box.

### .2.5.3.1 Facility Group ID (drop-down box)

All existing Facility Groups which could become associated with this Facility are listed in the drop-down box. Select the one you wish to add.

### .2.5.3.2 From Date: (popup calendar)

Default will be the current date and time. Click on [Add] to complete the association.

## .2.5.4 Edit Facility Group Member

### .2.5.4.1 EditFacilityGroup-member

id:[12450] image:

The screenshot shows the 'Facility Manager Application' interface. At the top, there is a navigation menu with tabs: Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below the menu is a blue header bar with 'Facility Manager Application' and sub-tabs: Main, Facilities, Facility Groups (selected), and Shipments. A 'Logout' link is on the right. The main content area has sub-tabs: Facility Group (selected), Rollups, Facilities, and Roles. The title is 'Facility Group Call Center Administration [ID:10000]' with a '[New Group]' link. The form contains the following fields:
 

- Facility Group ID: 10000 (Note: This cannot be changed without re-creating the facility group)
- Facility Group Type: Management Structure (dropdown)
- Primary Parent Group: All Employees assigned to the Call Center (dropdown)
- Name: Call Center Administration (text input)
- Description: Those exempt Parties responsible for managing the Call Center (text input)

 An 'Update' button is at the bottom of the form. At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

Editing of the Facility Group takes place under the major tab Facility Groups.

### .2.5.4.2 Discussion

When a Facility Group is edited, the process begins with this screen. See the major tab, <B> Facility Groups </B>, for further explanation.

## .2.6 Locations tab

## .2.6.1 Find Existing Location

Use this to find locations for specific facility areas or items. For example: inventory items or shipment pallets received; stock locations for picking; valuable resources such as computers or projectors; office assignments for personnel; vehicle parking assignments in a parking lot, etc. <p> The terms used here {Area, Aisle, Section, Level, and Position} can be changed by your programmer to match your requirements.

### .2.6.1.1 FindFacilityLocation

id:[DOCFAC2185] image:

The screenshot shows the 'Facility Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below this is a blue header for the application with sub-tabs: Main, Facilities, Facility Groups, Shipments, and Logout. A secondary navigation bar contains buttons for Facility, ContactMechs, Groups, Locations (selected), Roles, Inventory Items, Inventory Receive, Inventory Xfers, Receive Return, Picking, Packing, Incoming Shipments, and Outgoing Shipments. The main content area is titled 'Find Locations for Web Store Warehouse [ID:WebStoreWarehouse]' and includes buttons for '[New Facility]' and '[New Facility Location]'. Below these are input fields for Location SeqID, Area, Aisle, Section, Level, and Position, followed by a 'Find' button. At the bottom of the application area, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A text box at the very bottom of the page contains the instruction: 'Enter known parameters and press [Find]; a table of locations is returned. Press [Find] with no parameters and all are returned.'

### .2.6.1.2 link buttons

[New Facility] [New Facility Location] [Find] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.6.1.3 Location SeqID

The Location Sequence ID consists of the values for Area, Aisle, Section, Level and Position, all concatenated. When parameters are left blank, [Find] returns all locations for the selected Facility.

### .2.6.1.4 Area

Which Area of the Facility are you starting from?

### .2.6.1.5 Aisle

Which Aisle within that Area are you searching?

### .2.6.1.6 Section



Which Section of the Aisle is your focus?

**.2.6.1.7 Level**

Which Level (of shelving) within that Section is the Position?

**.2.6.1.8 Position**

What Position on that Level of this Section is the item located?

**.2.6.1.9 >> Found items screen**

When sought items are found, the search screen is expanded to show a table of all the items meeting the parameters entered. Note that this search is for specific physical locations within a facility. <p>Unless the locations have already been entered for the inventory items, the search will not return valid data. One of the tools for entering location information is discussed below under New Facility Location.

**.2.6.1.9.1 FindFacilityLocation-found**

id:[DOCFAC2194] image:

The screenshot shows the 'Facility Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below this is a header for 'Facility Manager Application' with sub-tabs: Main, Facilities, Facility Groups, Shipments, and Logout. A secondary navigation bar contains buttons for Facility, ContactMechs, Groups, Locations (selected), Roles, Inventory Items, Inventory Receive, Inventory Xfers, Receive Return, Picking, Packing, Incoming Shipments, and Outgoing Shipments. The main content area is titled 'Find Locations for Web Store Warehouse [ID:WebStoreWarehouse]' and includes buttons for '[New Facility]' and '[New Facility Location]'. Below these are input fields for Location SeqID, Area, Aisle, Section, Level, and Position (with '02' entered). A 'Find' button is present. The search results are displayed as a table:

Facility	Location SeqID	Type	Area	Aisle	Section	Level	Position		
WebStoreWarehouse	TLTLTL02	Pick/Primary	TL	TL	TL	LL	02	[New Inventory Item]	[Edit]
WebStoreWarehouse	TLTLUL02	Bulk	TL	TL	TL	UL	02	[New Inventory Item]	[Edit]

At the bottom of the application, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A footer box contains the text: 'Search for Position 02 returned 2 locations; tool stays visible for another search.'

**.2.6.1.9.2 link buttons**

[New Facility] [New Facility Location] [Find] [New Inventory Item] [Edit] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### **.2.6.1.9.3 Tool**

The search tool remains on the screen when findings are returned so you can quickly perform another search when needed.

### **.2.6.1.9.4 Table of Found Locations**

#### **.2.6.1.9.4.1 Facility**

Click on the Facility name [ID] to go to the Facilities tab > Facility sub-tab for that facility.

#### **.2.6.1.9.4.2 Location SeqID**

Click on the Location SeqID or [Edit] to be taken to the Edit Facility Location screen. This SeqID is created as a concatenation of the elements of the location. See further below for Edit/Create New Inventory Item.

#### **.2.6.1.9.4.3 Type**

Refers to what type of item is found there.

#### **.2.6.1.9.4.4 Area**

Which Area of the Facility are you starting from?

#### **.2.6.1.9.4.5 Aisle**

Which Aisle within that Area are you searching?

#### **.2.6.1.9.4.6 Section**

Which Section of the Aisle is your focus?

#### **.2.6.1.9.4.7 Level**

Which Level (of shelving) within that Section is the Position?

#### **.2.6.1.9.4.8 Position**

What Position on that Level of this Section is the item located?

## **.2.6.2 New Facility Location**

### **.2.6.2.1 EditFacilityLocation-new**



**Facility Manager Application**

Main Facilities Facility Groups Shipments Logout

Facility ContactMechs Groups Locations Roles Inventory Items Inventory Receive Inventory Xfers Receive Return Picking

Packing Incoming Shipments Outgoing Shipments

**Location for Web Store Warehouse [ID:WebStoreWarehouse]**

[New Facility] [New Facility Location]

Type: Pick/Primary  
 Area: AA  
 Aisle: 01  
 Section: BB  
 Level: 02  
 Position: CC

Update

**Location Product(s):**

Product	Minimum Stock & Move Quantity

**Add Product:**

Product ID:  Minimum Stock:  Move Quantity:  Add

W3C CSS W3C XHTML 1.0

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Powered By OFBiz

Create a new Facility Location. Do not add Products until LocSeqID exists.

### .2.6.2.2 link buttons

[New Facility] [New Facility Location] [Add] [Update] [Delete] [New Inventory Item] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.6.2.3 Tool for new location

The key to locations is the Location SeqID. This is created by this tool as a concatenation of the Area / Aisle / Section / Level / Position characters. There is a limit of 20 characters in the LocSeqID, so try to keep the parts descriptive yet brief.<p> After the Location SeqID has been established, you can continue at the screen to add products.

#### .2.6.2.3.1 Type (drop-down box)

Refers to what type of item is found there.

#### .2.6.2.3.2 Area

Which Area of the Facility are you starting from?

#### .2.6.2.3.3 Aisle

Which Aisle within that Area are you searching?

#### **.2.6.2.3.4 Section**

Which Section of the Aisle is your focus?

#### **.2.6.2.3.5 Level**

Which Level (of shelving) within that Section is the Position?

#### **.2.6.2.3.6 Position**

What Position on that Level of this Section is the item located?

### **.2.6.2.4 Location Products**

Add products to this location including Minimum Stock and Move Quantities after the Location SeqID has been generated.

#### **.2.6.2.4.1 Product ID**

Identify the stock item by Product ID.

#### **.2.6.2.4.2 Minimum Stock**

What is the minimum Inventory Level to be maintained?

#### **.2.6.2.4.3 Move Quantity**

How many of this Inventory item should be moved at a time?

### **.2.6.3 Edit Facility Location**

When Product is Added, the table of Location Products is immediately updated.

#### **.2.6.3.1 createProductFacilityLocation**



Facility Manager Application

Main Facilities Facility Groups Shipments Logout

The Following Occurred:

- The action was performed successfully.

Facility ContactMechs Groups Locations Roles Inventory Items Inventory Receive Inventory Xfers Receive Return Picking  
Packing Incoming Shipments Outgoing Shipments

Location for Web Store Warehouse [ID:WebStoreWarehouse]

[New Facility] [New Facility Location] [[New Inventory Item]

Facility ID WebStoreWarehouse  
Location SeqID AA01BB02CC  
Type Pick/Primary  
Area AA  
Aisle 01  
Section BB  
Level 02  
Position CC  
Update

Location Product(s):

Product	Minimum Stock & Move Quantity		
Micro Chrome Widget[WG-1111]	2	2	Update [Delete]

Add Product:

Product ID: Minimum Stock: Move Quantity: Add



Product can be identified at the new Location with minimum Stock and Move quantities set.

.2.6.3.2 link buttons

[New Facility] [New Facility Location] [New Inventory Item] [Add] [Update] [Delete] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

.2.6.3.3 Tool

Tool to update facility location.

.2.6.3.3.1 Facility ID

Which Facility has the location to be identified with this tool? This field should be populated already.

.2.6.3.3.2 Location SeqID

This must exist before product can be added to the location. First specify the components of the the

LocationSeqID (Area, Aisle, Section, Level, Position), below and then press [Update]. The component parts are concatenated into this LocationSeqID.

### **.2.6.3.3.3 Type (drop-down box)**

For example: Pick/Primary or Bulk. If this category is not applicable, leave blank or enter the '---.'

### **.2.6.3.3.4 Area**

Which Area of the Facility are you starting from?

### **.2.6.3.3.5 Aisle**

Which Aisle within that Area are you searching?

### **.2.6.3.3.6 Section**

Which Section of the Aisle is your focus?

### **.2.6.3.3.7 Level**

Which Level (of shelving) within that Section is the Position?

### **.2.6.3.3.8 Position**

What Position on that Level of this Section is the item located?

## **.2.6.3.4 Location Products**

Table of existing products within which you can change Minimum Stock and Move quantities or delete the item.

### **.2.6.3.4.1 Product**

Gives both the product Name and the Product ID for products already at this Location.

### **.2.6.3.4.2 Minimum Stock**

The established minimum stock (inventory) level for this location. You can change this level here in the table; press [Update] when complete.

### **.2.6.3.4.3 Move Quantity**

When moving this inventory to replenish stock, what is the minimum quantity that should be moved at a time?  
<BR> You can change this quantity in the table. Press [Update] when complete.

## **.2.6.3.5 Add Product**

### **.2.6.3.5.1 Product ID**

Enter the ID of the Product to be maintained at this location.

### **.2.6.3.5.2 Minimum Stock**

The established minimum stock (inventory) level for this location.

### **.2.6.3.5.3 Move Quantity**

When moving this inventory to replenish stock, what is the minimum quantity that should be moved at a time?

## **.2.7 Roles tab**

### **.2.7.1 AddPartytoFacility**



Facility Manager Application

- Facility
- ContactMechs
- Groups
- Locations
- Roles**
- Inventory
- Inventory Receive
- Inventory Xfers
- Receive Return
- Picking
- Packing
- Scheduling
- Incoming Shipments
- Outgoing Shipments

Roles for Catch the Calls [ID:10000]  
[New Facility]

Facility Role Member Maintenance

Party ID	Role Type	
SALES	Automated Agent	[Delete]
SALES	Department	[Delete]
admin	Administrator	[Delete]

Add Facility Party Role:

Party ID:  Role Type:  Add



Facility Roles are added or deleted from this screen. A click on the Party ID takes you to the Party Manager > Profiles screen.

### .2.7.2 link buttons

[New Facility] [Delete] [Add] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.7.3 Facility Role Member Maintenance

Table of existing facility-related Roles.

#### .2.7.3.1 Party ID

If you click on the Party ID, you are linked to the Profile screen for that ID in the Party Manager.

#### .2.7.3.2 Role Type

What Role does the Party play with this Facility?

### .2.7.4 Add Facility Party Role

#### .2.7.4.1 Party ID

You need to have the exact Party ID to enter here. You can go to the Party Manager to determine a Party ID, then return and enter it here.

#### .2.7.4.2 Role Type (drop-down box)

What Role does the Party play with this Facility? The Role must have already been established under the Party Manager before this assignment is made.

## .2.8 Inventory tab

## .2.8.1 ViewFacilityInventoryByProduct

id:[DOCFAC2253] image:



Welcome THE ADMINISTRATOR!  
2006-04-29 16:50:40.343

English (United States)

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

### Facility Manager Application

Main Facilities Facility Groups Shipments

Reports Logout

Facility ContactMechs Groups Locations Roles **Inventory** Inventory Receive Inventory Xfers Receive Return Picking Packing  
Scheduling Incoming Shipments Outgoing Shipments

Edit Facility Inventory Items For: [ID:WebStoreWarehouse]

[Inventory Items]

Product Type

Category

Supplier

QOH minus Min Stock Below  
Quantity of

Update link	Description	Minimum Stock	Reorder Quantity	Days To Ship	Total ATP	Total QOH	QOH minus Min Stock
<a href="#">GZ-2644</a>	Round Gizmo	2.0	10.0	15	505	505	503
<a href="#">GZ-8544</a>	Big Gizmo	10.0	50.0	1	18	18	8
<a href="#">WG-1111</a>	Micro Chrome Widget	2.0	10.0	1	55	55	53
<a href="#">WG-5569</a>	Tiny Chrome Widget	5.0	50.0	2	10	10	5
<a href="#">WG-9943-B3</a>	Giant Widget B3	2.0	10.0	1	10	10	8
<a href="#">WG-9943-B4</a>	Giant Widget B4	2.0	10.0	1	10	10	8
<a href="#">WG-9943-S3</a>	Giant Widget S3	2.0	10.0	1	10	10	8
<a href="#">WG-9943-S4</a>	Giant Widget S4	2.0	10.0	1	10	10	8



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The table below results from a successful search following a click on [Find].

## .2.8.2 link buttons

[Inventory Items] [Find] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

## .2.8.3 Search tool

### .2.8.3.1 Product Type (drop-down box)

To search on a Product Type, select the Type from the drop-down box.

### .2.8.3.2 Category (drop-down box)

### .2.8.3.3 Supplier (drop-down box)

Select a Supplier from the drop-down box if you want to limit the search to a specific Supplier.

### .2.8.3.4 QOH minus Min Stock Below Quantity of

If you wish to identify just those Inventory Items needing attention, this column limits returns to those where



(Quantity On Hand) minus the (Minimum Stock Below Quantity of) presents only those Inventory meeting this criterium.

## **.2.8.4 Table of Inventory Items**

### **.2.8.4.1 Update link**

Click on the Item ID in this column and you are taken to the Edit Product screen, under the Catalog Manager.

### **.2.8.4.2 Description**

Tells you in words what the Item is.

### **.2.8.4.3 Minimum Stock**

The minimum stock level set for this Product.

### **.2.8.4.4 Reorder Quantity**

The established quantity to reorder when stock reaches a pre-set level.

### **.2.8.4.5 Days To Ship**

How long it takes the stock to reach your facility after ordering from the supplier.

### **.2.8.4.6 Total ATP**

The number of units Available to Promise.

### **.2.8.4.7 Total QOH**

The total number of units physically present: Quantity On Hand.

### **.2.8.4.8 QOH minus Min Stock**

Subtract the Minimum Stock you have set as the trigger point to re-order from the total physical inventory or Quantity On Hand to get this number.

## **.2.8.5 Edit Inventory Item**

Note: Actions taken here with inventory levels are only applicable to the selected Facility.

### **.2.8.5.1 EditInventoryItem**



Facility Manager Application

Edit Inventory Item with ID [ 10000 ]

[\[New Inventory Item\]](#) [\[Transfer Item\]](#)

Inventory Item Id **10000** This cannot be changed without re-creating the inventoryItem

InventoryItem Type ID

Product ID  [\[Edit Product GZ-1004\]](#)

Party ID

Date Received

Expire Date

Facility / Container Select a Facility :  [\[Edit Facility WebStoreWarehouse\]](#)

OR enter a Container ID :

Facility Location  [\[Find Location\]](#)

Lot ID

Uom Id

Bin Number

Per Unit Price

Comments

Available To Promise / Quantity On Hand   
(This can be changed by doing a physical inventory variance below)

Physical Inventory Variances

Variance Reason Id

Available To Promise Var

Quantity On Hand Var

Comments

Physical Inventory Id	Physical Inventory Date	Party Id	General Comments	Variance Reason Id	Available To Promise Var	Quantity On Hand Var	Comments
-----------------------	-------------------------	----------	------------------	--------------------	--------------------------	----------------------	----------



Inventory Items are updated from this screen; Physical Variances in the Inventory are also accounted for here.

**.2.8.5.2 link buttons**

[New Inventory Item] [Transfer Item] [Edit Product ...] [Edit Facility ...] [Find Location] [Update] [Add] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### **.2.8.5.3 Working section**

#### **.2.8.5.3.1 Inventory Item ID**

This cannot be changed without re-creating the inventoryItem

#### **.2.8.5.3.2 Inventory Item Type ID (drop-down box)**

Generally Serialized or Non-Serialized.

#### **.2.8.5.3.3 Product ID**

Edit takes you to the Catalog > Main > Product update screen.

#### **.2.8.5.3.4 Party ID**

The Party performing or authorizing this update.

#### **.2.8.5.3.5 Date Received (popup calendar)**

Date the Product is received into this Inventory Item.

#### **.2.8.5.3.6 Expire Date (popup calendar)**

If only available for a specific period of time, when does that time expire.

#### **.2.8.5.3.7 Facility / Container**

The [Edit Facility] link takes you to the Facilities Tab > Facility sub-tab where you can update information about the Facility.

##### **.2.8.5.3.7.1 Select a Facility (drop-down box)**

Use the drop-down list to identify the Facility; this will generally populate correctly when editing an existing Inventory Item.

##### **.2.8.5.3.7.2 Container ID**

Enter the number of the Shipping Container if this Inventory Item is not related to a Facility.

#### **.2.8.5.3.8 Facility Location**

The [Find Location] link beside the box takes you to the Facilities Tab > Locations sub-tab.

#### **.2.8.5.3.9 Lot ID**

If this Item was part of an established shipping Lot, this will be the Lot number or ID.

#### **.2.8.5.3.10 Uom ID**

If the quantity is in any unit other than each, case, or a standard method of accounting, specify the Unit Of Measure here, such as Gallon, Barrel, Ton, etc.

#### **.2.8.5.3.11 Bin Number**

If the product is in a numbered Bin at the identified Location, specify the Bin here.

#### **.2.8.5.3.12 Per Unit Price**

The acquisition cost for these Inventory Items.

#### **.2.8.5.3.13 Comments**

Anything needed to explain the changes or describe the circumstances can be entered here.

#### **.2.8.5.3.14 Available to Promise / Quantity On Hand**

What number of units is actually available to fulfill orders, to sell, to deliver, etc.

### **.2.8.5.4 Physical Inventory Variances**

#### **.2.8.5.4.1 Variance Reason (drop-down box)**

What prompted the recording of a Variance?

#### **.2.8.5.4.2 Available to Promise Var**

IMPORTANT: Enter the amount of Variance, not the absolute number available. For example, if the inventory document shows 10, but one is damaged and not available to ship, record the difference as a -1 (that is a minus one) to effect an adjustment.

#### **.2.8.5.4.3 Quantity on Hand Var**

IMPORTANT: You are entering Variance in the QOH (quantity on hand), not the absolute QOH. Therefore, if you should have 15 but only find 10, enter a -5 (minus five). If you should have 10 but find 18, then you would enter 8. You are reporting Variances from the reported inventory here, not actual quantities.

#### **.2.8.5.4.4 Comments**

Explain the reason for the Variance or give more details about why it was entered.

#### **.2.8.5.4.5 Table of Physical Inventory Variances**

This is generated and updated after each entry with the tool above. Remember that the numbers given are variances, not absolute inventory figures.

##### **.2.8.5.4.5.1 Physical Inventory ID**

Number assigned by the system when this Inventory Variance was created. This cannot be edited, only viewed in the table.

##### **.2.8.5.4.5.2 Physical Inventory Date**

Date the Variance was created.

##### **.2.8.5.4.5.3 Party ID**

The Party ID of record when the Variance was created. This could be the login Party or the Party authorizing the entry.

##### **.2.8.5.4.5.4 General Comments**

General comments entered elsewhere.

##### **.2.8.5.4.5.5 Variance Reason ID**

The reason why this Variance was entered; originally selected from the drop-down list.

##### **.2.8.5.4.5.6 Available to Promise Var**

The variation on the number of units available to promise. If a reduction in quantity, there will be a minus sign (-) in front of the number.

##### **.2.8.5.4.5.7 Quantity on Hand Var**

The variation on the number of units physically present. If a reduction in quantity, there will be a minus sign (-) in front of the number.

##### **.2.8.5.4.5.8 Comments**

Hopefully an explanation for the Variance.

### **.2.8.6 Create New Inventory Item**

#### **.2.8.6.1 EditInventoryItem-new**



**Facility Manager Application**

Main Facilities Facility Groups Shipments Reports Logout

Facility ContactMechs Groups Locations Roles **Inventory** Inventory Receive Inventory Xfers Receive Return Picking Packing

Scheduling Incoming Shipments Outgoing Shipments

[Edit Inventory Item with ID \[ \]](#)  
[\[New Inventory Item\]](#)

InventoryItem Type ID

Product ID

Party ID

Date Received

Expire Date

Facility / Container Select a Facility :    
 OR enter a Container ID :

Facility Location

Lot ID

Uom Id

Bin Number

Per Unit Price

Comments



Basically the same as the Edit screen (above) but without all the links and without the Variances section.

### .2.8.6.2 link buttons

[New Inventory Item] [Update] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.8.6.3 Discussion

The fields have already been described above under Edit Inventory Item. Of course, some of the fields under that topic will not appear when creating a new Item. <P> Enter as much data as you know here. You can always come back after an Inventory Item has been created and add or change the information.

## .2.8.7 Inventory Availability for the Facility

When you click on the [Inventory Items] link above, you are brought to this screen.

### .2.8.7.1 EditFacilityInventoryItems



Inventory Items for Web Store Warehouse [ID:WebStoreWarehouse]

1 - 17 of 17

Item ID	Item Type	Status	Received	Expire	Product ID	Location	Lot ID	Bin Num	ATP/QOH or Serial#		
<a href="#">10001</a>	Non-Serialized		2006-04-29 18:43:13.921		<a href="#">GZ-1004</a>	<a href="#">::::[]</a>			0 / 1	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9003</a>	Non-Serialized				<a href="#">GZ-8544</a>	<a href="#">TL:TL:TL:LL:02(Pick/Primary)[TLTLTLL02]</a>			3 / 3	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9005</a>	Non-Serialized				<a href="#">WG-1111</a>	<a href="#">TL:TL:TL:LL:03(Pick/Primary)[TLTLTLL03]</a>			5 / 5	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9001</a>	Non-Serialized				<a href="#">GZ-2644</a>	<a href="#">TL:TL:TL:LL:01(Pick/Primary)[TLTLTLL01]</a>			5 / 5	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">10000</a>	Non-Serialized		2006-04-29 18:43:13.921		<a href="#">GZ-1004</a>	<a href="#">::::[]</a>			7 / 7	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9024</a>	Non-Serialized				<a href="#">GZ-1006-4</a>	<a href="#">::::[]</a>			8 / 8	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9023</a>	Non-Serialized				<a href="#">GZ-1006-3</a>	<a href="#">::::[]</a>			8 / 8	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9022</a>	Non-Serialized				<a href="#">GZ-1006-2</a>	<a href="#">::::[]</a>			8 / 8	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9021</a>	Non-Serialized				<a href="#">GZ-1006-1</a>	<a href="#">::::[]</a>			8 / 8	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9013</a>	Non-Serialized				<a href="#">WG-9943-S4</a>	<a href="#">::::[]</a>			10 / 10	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9012</a>	Non-Serialized				<a href="#">WG-9943-S3</a>	<a href="#">::::[]</a>			10 / 10	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9011</a>	Non-Serialized				<a href="#">WG-9943-B4</a>	<a href="#">::::[]</a>			10 / 10	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9010</a>	Non-Serialized				<a href="#">WG-9943-B3</a>	<a href="#">::::[]</a>			10 / 10	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9006</a>	Non-Serialized				<a href="#">WG-5569</a>	<a href="#">TL:TL:TL:UL:04(Bulk)[TLTLTUL04]</a>			10 / 10	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9002</a>	Non-Serialized				<a href="#">GZ-8544</a>	<a href="#">TL:TL:TL:UL:02(Bulk)[TLTLTUL02]</a>			15 / 15	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9004</a>	Non-Serialized				<a href="#">WG-1111</a>	<a href="#">TL:TL:TL:UL:03(Bulk)[TLTLTUL03]</a>			50 / 50	<a href="#">Edit</a>	<a href="#">Transfer</a>
<a href="#">9000</a>	Non-Serialized				<a href="#">GZ-2644</a>	<a href="#">TL:TL:TL:UL:01(Bulk)[TLTLTUL01]</a>			500 / 500	<a href="#">Edit</a>	<a href="#">Transfer</a>

1 - 17 of 17



The link [Inventory Items] brings up this table of all the Items with numerous links to other screens.

### .2.8.7.2 link buttons

[New Facility] [Create New Inventory Item for this Facility] [View Inventory By Product] [Search Inventory Items] [Edit] [Transfer] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.8.7.3 Table of Inventory Items

#### .2.8.7.3.1 Item ID

Click on the Item ID and you will be taken to the EditInventoryItem screen for this Item. Remember that Inventory Item is a collection of like items received or grouped through a physical inventory action. A particular Product could be found in several unique Inventory Items, perhaps at different locations.

#### **.2.8.7.3.2 Item Type**

Here referring to 'Serialized' or 'Non-Serialized'.

#### **.2.8.7.3.3 Status**

If a statusing system is in place, the current or last-reported Status would be given here.

#### **.2.8.7.3.4 Received**

When this Item ID was received or established through a physical inventory action.

#### **.2.8.7.3.5 Expire**

If the existence or presence of this Item ID is to be terminated at some point, that date can be given here.

#### **.2.8.7.3.6 Product ID**

Click on this link to be taken to the Catalog Manager > Edit Product screen.

#### **.2.8.7.3.7 Location**

Where the Inventory Item presently exists. Click on this link to be taken back to the Locations tab.

#### **.2.8.7.3.8 Lot ID**

Which identified product Lot includes this Item ID.

#### **.2.8.7.3.9 Bin Num**

If the Products for this Item ID are located within a numbered Bin, that number is given here.

#### **.2.8.7.3.10 ATP / QOH or Serial #**

The number of units Available to Promise / and the Quantity On Hand is given for non-serialized products. With Serialized units, the Serial Number is given. Generally speaking, a Serialized unit will have its own Item ID, not shared with any other.

#### **.2.8.7.3.11 Edit link column**

Clicking on either the[Edit] link here or on the Item ID number will take you to the Edit Inventory screen.

#### **.2.8.7.3.12 Transfer link column**

Clicking on the [Transfer] link opens this Inventory Item under the Inventory Xfers (transfers) tab.

### **.2.9 Inventory Receive tab**

#### **.2.9.1 Receive Products by Purchase Order**

If receiving items ordered under a Purchase Order, enter that number here to receive them. (You can find it with the search tool.) Then press [Receive Product]. <br>If order is not by PO, enter the Product ID in the lower box. Do NOT enter both numbers; the Purchase Order product details will be populated in the next screen.

##### **.2.9.1.1 ReceiveInventoryPO**



Receive Inventory Into "Web Store Warehouse" [ID :WebStoreWarehouse]  
[\[New Facility\]](#)

Receive Item(s)

Purchase Order Number  (ProductLeave empty for single product receiving)  
Product ID  (Leave empty for entire PO receiving)



Enter either the Purchase Order number or the Product ID, then press [Receive Product(s)]. Do NOT complete both boxes.

**.2.9.1.2 link buttons**

[New Facility] [Receive Product(s)] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

**.2.9.1.3 Purchase Order Number (popup search box)**

Enter the PO number here (the one generated in the Orders section) then press [Receive Products].

**.2.9.1.3.1 LookupPOpopup**



https://localhost:8443 - Lookup Purchase OrderHeader And Roles - Mozilla

Order Id   Equals  Begins With  Contains  Is Empty  Ignore  
 Case

Shipment Method Type Id

Carrier Party Id   Equals  Begins With  Contains  Is Empty  Ignore  
 Case

Ship After Date   Equals  Same Day  Greater Than From Day Start  
 Greater Than

Ship By Date   Less Than  Up To Day  Up Thru Day  Is Empty  
 Equals  Same Day  Greater Than From Day Start  
 Greater Than

City   Equals  Begins With  Contains  Is Empty  Ignore  
 Case

Postal Code   Equals  Begins With  Contains  Is Empty  Ignore  
 Case

Country Geo Id

State Province Geo Id

Party Id   Equals  Begins With  Contains  Is Empty  Ignore  
 Case

Grand Total   Equals  Greater Than  Greater Than Equals  
 Less Than  Less Than Equals  Is Empty

Order Id	Shipment Method Type Id	Carrier Party Id	Ship After Date	Ship By Date	City	Postal Code	Country Geo Id	State Province Geo Id	Party Id	Order Type Id	Grand Total
WS10001	Guaranteed Next Day	UPS			Pleasant Grove	84055	USA	UT	10040	Sales	752.72

Popup screen to help locate Purchase Orders.

**.2.9.1.4 Product ID (popup search box)**

**.2.9.1.4.1 LookupIDpopup**

## Manager Reference: Facility

**Product ID**   Equals  Begins With  Contains  Is Empty  Ignore  
 Case

**Brand Name**   Equals  Begins With  Contains  Is Empty  Ignore  
 Case

**Internal Name**   Equals  Begins With  Contains  Is Empty  Ignore  
 Case

**Product Type**

**Primary Category**

[Lookup](#)

Product ID	Brand Name	Internal Name	Product Type	
<a href="#">GZ-1000</a>		Tiny Gizmo	FINISHED_GOOD	
<a href="#">GZ-1001</a>		Nan Gizmo	FINISHED_GOOD	
<a href="#">GZ-1004</a>		Rainbow Gizmo	FINISHED_GOOD	
<a href="#">GZ-1005</a>		.NIT Gizmo	FINISHED_GOOD	
<a href="#">GZ-1006</a>		Open Gizmo	FINISHED_GOOD	<a href="#">Variants</a>
<a href="#">GZ-2002</a>		Square Gizmo	FINISHED_GOOD	
<a href="#">GZ-2644</a>		Round Gizmo	FINISHED_GOOD	
<a href="#">GZ-5005</a>		Purple Gizmo	FINISHED_GOOD	
<a href="#">GZ-7000</a>		Massive Gizmo	FINISHED_GOOD	
<a href="#">GZ-8544</a>		Big Gizmo	FINISHED_GOOD	
<a href="#">GZ-9290</a>		His/Her Gizmo	FINISHED_GOOD	
<a href="#">WG-1111</a>		Micro Chrome Widget	FINISHED_GOOD	
<a href="#">WG-5569</a>		Tiny Chrome Widget	FINISHED_GOOD	
<a href="#">WG-9943</a>		Giant Widget	FINISHED_GOOD	<a href="#">Variants</a>
<a href="#">GZ-KIT</a>		Pre-Assembled Gizmo Kit	FINISHED_GOOD	
<a href="#">GZ-BASKET</a>		Auto-Explode Gizmo Basket	FINISHED_GOOD	
<a href="#">RAM256_BRAND</a>		RAM 256 no parity	FINISHED_GOOD	
<a href="#">HD2GB_BRAND</a>		HD 2 GB	FINISHED_GOOD	
<a href="#">HD4GB_BRAND</a>		HD 4 GB	FINISHED_GOOD	
<a href="#">ETH_BRAND</a>		Ethernet Card 10/100	FINISHED_GOOD	

- 19 - 0 of 23 [Next](#)

When the Product Type was requested, these search results returned. Click the Product ID.

### .2.9.1.5 >> Receive Products

#### .2.9.1.5.1 ReceiveInventoryPO-Received



Facility Manager Application

- Facility
- ContactMechs
- Groups
- Locations
- Roles
- Inventory
- Inventory Receive**
- Inventory Xfers
- Receive Return
- Picking
- Packing
- Scheduling
- Incoming Shipments
- Outgoing Shipments

Receive Inventory Into "Web Store Warehouse" [ID :WebStoreWarehouse]  
[\[New Facility\]](#)

Receive Purchase Order #WS10000 Select All

Bulk Item : <input type="text"/>	<input type="button" value="Create Product"/>	Location: <input type="text"/>	Qty Received : <input type="text" value="1"/>
Inventory Item Type : <input type="text" value="Non-Serialized"/>	Rejection Reason : <input type="text"/>	Qty Rejected : <input type="text" value="0"/>	<input type="checkbox"/>
	Owner: <input type="text" value="Company"/>	Per Unit Price : <input type="text" value="0"/>	USD

---

00002: <a href="#">GZ-8544 - Big Gizmo</a> : Big Gizmo w/ Legs	Location: <input type="text" value="TL:TL:TL:LL:02(Pick/Primary)[TLTLTLLL02]"/>	Qty Received : <input type="text" value="5"/>	
Inventory Item Type : <input type="text" value="Non-Serialized"/>	Rejection Reason : <input type="text" value="Damaged"/>	Qty Rejected : <input type="text" value="1"/>	<input checked="" type="checkbox"/>
	Owner: <input type="text" value="Company"/>	Per Unit Price : <input type="text" value="121.5"/>	USD



Receive the ordered product into inventory at this screen. Set Types and Reasons before clicking [Receive Selected Product(s)].

### .2.9.1.5.2 link buttons

[New Facility] [Receive Selected Product(s)] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.9.1.5.3 Select All

Check the Select All button to receive every item. If more than one item and you are not prepared to 'receive' one or more at this time, select only those that you wish. The Purchase Order will remain active until all items have been received or otherwise dispatched.

### .2.9.1.5.4 Bulk Item or Item ID

Each line item of the PO will have one or the other of these given first in the upper LH corner of its section to identify what is shown.

### .2.9.1.5.5 Location (drop-down box)

Enter warehouse location destination if known. For established products, use the drop-down box to complete the field.

### .2.9.1.5.6 Qty Received

This quantity and the Qty Rejected number need to equal the number on the order. You can make other adjustments to the Inventory elsewhere, but the PO will not be cleared for payment until the totals received and rejected together equal the total ordered.

**.2.9.1.5.7 Inventory Item Type (drop-down box)**

Items identified with serial numbers need to be processed more carefully than those non-serialized.

**.2.9.1.5.8 Rejection Reason (drop-down box)**

There could be other reasons for rejecting some or all of the order but these generally cover most instances:  
<B><br> Damaged <br> Not Ordered <br> Overshipped </B>

**.2.9.1.5.9 Qty Rejected**

Again, the total Rejected together with the total Received must equal the total Ordered in the Purchase Order.

**.2.9.1.5.10 Owner**

This would generally be the Company or the Department within the company which placed the original order. Matches what was selected in the first screen under the Order Manager > Order Entry screen.

**.2.9.1.5.11 Per Unit Price**

How much was paid for each item with this Purchase.

**.2.9.1.5.12 >> Receive Selected Products**

.2.9.1.5.12.1 receiveInventoryProduct-Receipt



**Receive Inventory** Into "Web Store Warehouse" [ID :WebStoreWarehouse]  
[\[New Facility\]](#)

**Receipt(s) For Purchase Order #WS10000**

Shipment Id#	Receipt#	Date	PO #	Line #	Product ID	Per Unit Price	Rejected	Accepted
<input type="checkbox"/>	10010	2006-05-01 09:15:16.906	<a href="#">WS10000</a>	00002	GZ-8544	121.50	1	5
<input type="checkbox"/>	10011	2006-05-01 09:15:16.906	<a href="#">WS10000</a>	00002	GZ-8544	121.50	1	5

**Receive Purchase Order #WS10000** Select All

Bulk Item :  [Create Product](#)

Inventory Item Type :

Location:  Qty Received :

Rejection Reason :  Qty Rejected :

Owner:  Per Unit Price :  USD

[Receive Selected Product\(s\)](#)



After product has been received, this screen confirms with a Receipt number for each line item, and shows any not yet received.

.2.9.1.5.12.2 link buttons

[New Facility] [Receive Selected Product] [Create Product] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments] </B>

.2.9.1.5.12.3 Receipt(s) For Purchase Order

This section provides details about the inventory just received: <B><P> Shipment ID# <br> Receipt # <br> Date <br> PO # <br> Line # <br> Product ID <br> Rejected <br> Accepted </B>

.2.9.1.5.12.4 Receive Purchase Order

If there are any items remaining in the PO to be received, this section functions much like the previous screen to allow you to receive some or all of the remainder.

**.2.9.2 Receive Products by Product ID**

**.2.9.2.1 Discussion**

Enter the Product ID here only if the Product was not ordered by Purchase Order. Then press [Receive Products]. <P> The next screen appears when Product ID is entered and [Receive Product(s)] is pressed. Do NOT press the [Receive] button at the bottom of this screen until all the data on the screen is correct. Upon pressing the screen you are taken back to a fresh Receive Inventory screen, above.

### .2.9.2.2 ReceiveInventoryProduct

id:[10484] image:



Welcome THE ADMINISTRATOR!  
2006-04-29 18:43:13.765

English (United States)

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

**Facility Manager Application**

Main Facilities Facility Groups Shipments Reports Logout

Facility ContactMechs Groups Locations Roles Inventory **Inventory Receive** Inventory Xfers Receive Return Picking Packing

Scheduling Incoming Shipments Outgoing Shipments

Receive Inventory Into "Web Store Warehouse" [ID :WebStoreWarehouse]  
[New Facility]

Product ID	GZ-1004
Product Name	<a href="#">Rainbow Gizmo</a>
Product Description	The only multi-colored gizmo
Item Description	<input type="text"/>
Inventory Item (optional will create new if empty)	<input type="text"/>
Inventory Item Type	Non-Serialized <input type="button" value="v"/>
Date Received	2006-04-29 18:43:13.921
Facility Location	<input type="text"/>
Rejected Reason	Damaged <input type="button" value="v"/>
Quantity Rejected	<input type="text" value="2"/>
Quantity Accepted	<input type="text" value="8"/>
Per Unit Price	<input type="text" value="29.99"/>



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Powered By OFBiz

Receive the ordered Product into Inventory at this screen. Set Types and Reasons before receiving.

### .2.9.2.3 link buttons

[New Facility] [Receive] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.9.2.4 Product ID

Identifies the Product entered in the previous screen.

### .2.9.2.5 Product Name

Common name of the Product. Click on ths to open another Browser in the Catalog Manager at the Product Edit screen for this product.

### .2.9.2.6 Product Description

How the product is described in the catalog.

### **.2.9.2.7 Item Description**

The Item is what is inventoried. This describes that inventoried item.

### **.2.9.2.8 Inventory Item**

In Inventory Item is a unit of Product that is tracked through the system. All of the same Product ID that is received or inventoried as a collection of the same Products are tracked as a group, identified by this Inventory Item number assigned when the product is received.

### **.2.9.2.9 Inventory Item Type (drop-down box)**

Generally to establish whether or not the items have serial numbers assigned which might need tracking.

### **.2.9.2.10 Date Received**

Automatically completed, but can be modified if current date and time is not the actual receipt time.

### **.2.9.2.11 Facility Location**

May be automatically populated with an established location for this Inventory Item, but can be changed.

### **.2.9.2.12 Rejected Reason (drop-down box)**

If all or part of the received goods are being rejected, select the reason from this drop-down box.

### **.2.9.2.13 Quantity Rejected**

How many units are being rejected at this time.

### **.2.9.2.14 Quantity Accepted**

The sum of these Accepted and the number Rejected needs to equal the total Received on the Invoice.

### **.2.9.2.15 Per Unit Price**

The price per unit of product.

### **.2.9.2.16 -Receive- Link**

When this button is clicked, the products are received into inventory and you are returned to the first Inventory Receive tab screen.

## **.2.10 Inventory Transfers tab**

Current transfers are displayed on this first 'Find Transfers' screen. If none displayed, go back to the Main tab, select a facility, then return here. [Inventory Transfer] takes you to the screen for establishing a transfer, 'Inventory Transfers for ...', below.

### **.2.10.1 FindFacilityTransfers**



Facility Manager Application

- Facility
- ContactMechs
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- Inventory Xfers
- Receive Return
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Inventory Transfers for Web Store Warehouse [ID:WebStoreWarehouse]

- [New Facility]
- [Active and Inactive]
- [Inventory Transfer]

From: Web Store Warehouse [ID:WebStoreWarehouse]

Transfer ID	Item	To	Send Date	Status	
10000	10001	My Retail Store [MyRetailStore]	2006-04-29 19:09:01.671	En-Route	[Edit]



This screen opens the Inventory Transfer tab with tables of all incomplete Transfers for the active Facility. Click [Edit].

### .2.10.2 link buttons

[New Facility] [Active and Inactive (toggle)] [Inventory Transfer] [Edit] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.10.3 Inventory Transfers <B>To: / From:</B> ...

Click on the Transfer ID or [Edit] link to go to the Inventory Transfer screen, below.

#### .2.10.3.1 Transfer ID

Click on this to go to the Inventory Transfer screen, below.

#### .2.10.3.2 Item

Click on this to go back to the Edit Inventory Item, above.

#### .2.10.3.3 From /or/ To

This heading (From or To) depends upon whether the transfer is coming in or going out. Click on the Facility ID to go to the Edit Facility screen.

#### .2.10.3.4 Send Date

Date the transfer was taken to the point of the following Status.

#### .2.10.3.5 Status

Where is the Inventory ID at in the transfer process?

### .2.10.4 Edit Inventory Transfer ID

#### .2.10.4.1 TransferInventoryItem





**Inventory Transfer** From Web Store Warehouse [ID:WebStoreWarehouse]  
[New Facility]

Inventory Item Id 10000  
InventoryItem Type ID Non-Serialized  
Product ID GZ-1004  
Status --  
Comments --  
Serial# or ATP/QOH 8 / 8

Transfer Status Requested  
Transfer Send Date [ ] [Now]  
To Facility / Container Select a Facility: My Retail Store [MyRetailStore]  
OR enter a Container ID: [ ]  
To Location Receiving  
Comments Customer waiting in the retail store.  
Quantity To Transfer 1  
Transfer



Create or edit an existing Transfer at this screen.

**.2.10.4.2 link buttons**

[New Facility] [Now] [Update] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

**.2.10.4.3 Inventory Item ID**

That which is being transferred from one location to another.

**.2.10.4.4 Inventory Item Type ID**

Generally Serial or Non-Serial.

**.2.10.4.5 Product ID**

Which Product is included in the Inventory Item. A click on this link takes you to Catalog manager - Product Catalog page.

**.2.10.4.6 Status**

The last known status for this Transfer.

**.2.10.4.7 Comments**

A good place to learn why the transfer is taking place.

**.2.10.4.8 Serial # or ATP/QOH**

These items cannot be changed without creating a new Inventory Transfer.

**.2.10.4.9 Transfer Status (drop-down box)**

As you process this page, the Status should be changed to reflect the new conditions. Select from among the following: <P><B> Requested <br> Scheduled <br> Enroute <br> Complete <br> Cancelled</B>

**.2.10.4.10 Transfer Send Date**

[Now] inserts current date/time. Format: 2005-05-27 13:31:46.500

**.2.10.4.11 Transfer Receive Date**

[Now] inserts current date/time. Format: 2005-05-27 13:31:46.500

**.2.10.4.12 To Facility / Container (drop-down box)**

Facility (or Container) where the Inventory Item is being transferred to. Drop-down box appears when the transfer is not yet completed.

**.2.10.4.13 To Location**

Specific warehouse or shelving location for the final move.

**.2.10.4.14 Comments**

Any problems encountered or explanations needed by others.

**.2.10.4.15 Quantity to Transfer**

How many units are being transferred.

**.2.10.5 Edit Inventory Item**

**.2.10.5.1 EditInventoryItems-Xfer**



Facility Manager Application

Edit Inventory Item with ID [ 10001 ]

[\[New Inventory Item\]](#) [\[Transfer Item\]](#)

Inventory Item Id **10001** This cannot be changed without re-creating the inventoryItem

InventoryItem Type ID

Product ID  [\[Edit Product GZ-1004\]](#)

Party ID

Date Received

Expire Date

Facility / Container Select a Facility :  [\[Edit Facility WebStoreWarehouse\]](#)

OR enter a Container ID :

Facility Location  [\[Find Location\]](#)

Lot ID

Uom Id

Bin Number

Per Unit Price

Comments

Available To Promise / Quantity On Hand   
(This can be changed by doing a physical inventory variance below)

Physical Inventory Variances

Variance Reason Id

Available To Promise Var

Quantity On Hand Var

Comments

Physical Inventory Id	Physical Inventory Date	Party Id	General Comments	Variance Reason Id	Available To Promise Var	Quantity On Hand Var	Comments



Note that the Inventory Item linked you back here to the Inventory tab for editing the item.

## .2.10.6 Create an Inventory Transfer

To get to this point, click on the <B>[Inventory Xfers]</B> tab. Then click on the link [Inventory Transfer] which will bring up the following screen.

## .2.10.6.1 Establish Inventory Transfer Item

### .2.10.6.1.1 TransferInventoryItem-find

id:[DOCFAC2340] image:

The screenshot displays the 'Facility Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below this, a blue header bar contains 'Facility Manager Application' and sub-tabs for Main, Facilities, Facility Groups, Shipments, Reports, and Logout. The main content area features a series of buttons for navigation: Facility, ContactMechs, Groups, Locations, Roles, Inventory, Inventory Receive, Inventory Xfers, Receive Return, Picking, Packing, Scheduling, Incoming Shipments, and Outgoing Shipments. The 'Inventory Xfers' button is highlighted. Below these buttons, the text reads 'Inventory Transfer From Web Store Warehouse [ID:WebStoreWarehouse]' with a '[New Facility]' link. A form field for 'Inventory Item Id' contains the value '9005', and a 'Get Item' button is positioned to its right. At the bottom of the page, there are W3C CSS and XHTML 1.0 validation logos, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A text box at the very bottom of the screenshot states: 'Inventory Transfer process begins with the selection of an Inventory Item ID from the active Facility.'

### .2.10.6.1.2 link buttons

[New Facility] [Get Item] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.10.6.1.3 Inventory Item ID

Note that this is not the Part number or the end Item ID -- it is the Inventory Item ID which holds the group of related items together for inventory and tracking purposes. You will be transferring items from this group of stock (Inventory Item ID) to another location. <p> To confirm that the items you want are part of the Inventory Item ID, you can check at the Inventory Items tab.

## .2.10.6.2 Inventory Transfer Creation screen

### .2.10.6.2.1 TransferInventoryItem-create



**Inventory Transfer** From Web Store Warehouse [ID:WebStoreWarehouse]  
[New Facility]

Inventory Item Id 9005  
InventoryItem Type ID Non-Serialized  
Product ID WG-1111  
Status --  
Comments --  
Serial# or ATP/QOH 5 / 5

Transfer Status Requested  
Transfer Send Date [ ] [Now]  
To Facility / Container Select a Facility: Web Store Warehouse [WebStoreWarehouse]  
OR enter a Container ID: [ ]  
To Location [ ]  
Comments [ ]  
Quantity To Transfer 5  
Transfer



Create the Inventory Transfer transaction from this screen; very similar to the Edit Transfer screen shown earlier.

**.2.10.6.2.2 link buttons**

[New Facility] [Now] [Transfer] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

**.2.10.6.2.3 Inventory Item ID**

This is what is being moved - the Inventory Item, which includes the product content.

**.2.10.6.2.4 Inventory Item Type ID**

Serialized or Non-Serialized?

**.2.10.6.2.5 Product ID**

This is the Product content of the Inventory Item. A click on the ID takes you to Catalog manager - Product Catalog page.

**.2.10.6.2.6 Status**

Will initially start with no status. After the Transfer is created, you may see reported status here, reflecting where the process is at.

### **.2.10.6.2.7 Comments**

May reflect comments entered earlier regarding this Inventory Item. As the transfer progresses, this should mention problems or reasons for the transfer.

### **.2.10.6.2.8 Serial # or ATP/QOH**

If this is a serialized Inventory Item, the serial number will be given. Otherwise, quantities are given here for ATP and QOH.

### **.2.10.6.2.9 Transfer Status (drop-down box)**

Your first entry here should be Requested or Scheduled. Status categories available include: <B> <p> Requested <br> Scheduled <br> En-Route <br> Complete <br> Cancelled </B>

### **.2.10.6.2.10 Transfer Send Date**

[Now] inserts current date/time.

### **.2.10.6.2.11 To Facility / Container**

.2.10.6.2.11.1 Select a Facility (drop-down box)

Select the destination for the Inventory Item from the drop-down box unless it is going to a shipping Container.

.2.10.6.2.11.2 Container ID:

Do NOT enter both a Facility AND a Container ID; only one or the other.

### **.2.10.6.2.12 To Location**

This means an identified location within the receiving facility. You may leave blank unless already specified by the requester.

### **.2.10.6.2.13 Comments**

You should record the reason for the transfer and indicate any problems or unusual situations here.

### **.2.10.6.2.14 Quantity to Transfer**

This needs to be completed. Should not exceed either the ATP or QOH.

## **.2.11 Receive Return tab**

A previously-generated Return ID number must exist in the system before items can be received this way.

### **.2.11.1 Find the return**

Returns must first be created, assigned a number and approved in the Order Manager - Returns tab. Then locate the return, using its Return ID number.

#### **.2.11.1.1 ReceiveReturn**



**Facility Manager Application**

Main | Facilities | Facility Groups | Shipments | Reports | Logout

[Facility](#) | [ContactMechs](#) | [Groups](#) | [Locations](#) | [Roles](#) | [Inventory](#) | [Inventory Receive](#) | [Inventory Xfers](#) | **[Receive Return](#)** | [Picking](#) | [Packing](#)  
[Scheduling](#) | [Incoming Shipments](#) | [Outgoing Shipments](#)

[Receive Return](#) Into "Web Store Warehouse" [ID:WebStoreWarehouse]  
[\[New Facility\]](#)

**Receive Return**

Return Number



Before "receiving" the Return, the Return Number must be known and entered here. All Returns begin in the Order Manager.

**.2.11.1.2 link buttons**

[New Facility] [Receive Product(s)] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

**.2.11.1.3 Return Number**

Enter the Return ID number, then click on the [Receive Products] link.

**.2.11.2 Receive Return into ...**

**.2.11.2.1 ReceiveReturn-found**



Facility Manager Application

Receive Return Into "Web Store Warehouse" [ID:WebStoreWarehouse]  
[New Facility]

Receive Return # 10000 Select all

00001: [GZ-9290 - His/Her Gizmo](#) : A set of his/her gizmos Location:  Qty Received:   
Initial Inventory Item Status:

[Receive Selected Product\(s\)](#)



Actually accept the return of the items into your Facility through this screen. Location is optional.

**.2.11.2.2 link buttons**

[New Facility] [Receive Selected Product(s)] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

**.2.11.2.3 Receive Return**

A chart of items being returned is presented. Each item comes with the following information or processing boxes.

**.2.11.2.3.1 Item ID number and name**

Includes descriptive name. Click on this link to go to a new window with the Product in the Catalog Manager > Product Edit page.

**.2.11.2.3.2 Location**

While this might populate from the known warehouse location, you may enter a location or a temporary location here, but the location needs to be an established one, recognized by the system.

**.2.11.2.3.3 Qty Received**

Must indicate the Quantity.

**.2.11.2.3.4 Initial Inventory Item Status**

Drop-down box with possible status of: <B><br> Returned <br> Available <br> Defective </B>

**.2.11.2.4 Select All (check box)**

If returning all the items, click on the Select all box. Else, check just those boxes following items to be actually returned.



### .2.11.2.5 Discussion

Returns are created in the Order Manager. They must be approved, incoming shipments need to be created, and then when they actually arrive, you come to this screen with the correct Return Number. See the document <Application Overview for Users > and go to the appropriate section of the Sales Order Process for further details. <br> To close out the Return, physically bringing the item back into inventory at the stated Status, click on the [Receive Selected Product(s)] link in the lower right-hand corner of the screen. A Receipt will be generated as discussed below to indicate success.

### .2.11.3 Product Received - Receipt

#### .2.11.3.1 receiveReturnedProduct

id:[13304] image:

The screenshot shows the 'Facility Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below this is a header area with the 'OPEN FOR BUSINESS OFBiz.org' logo and a user greeting: 'Welcome THE ADMINISTRATOR! 2005-10-13 12:15:32.516'. A language dropdown menu is set to 'English (United States)' with a 'Set' button.

The main content area is titled 'Facility Manager Application' and has sub-tabs for Main, Facilities, Facility Groups, and Shipments. A secondary navigation bar includes buttons for Facility, ContactMechs, Groups, Locations, Roles, Inventory Items, Inventory Receive, Inventory Xfers, Receive Return (highlighted), Picking, and Packing. Below this are buttons for Incoming Shipments and Outgoing Shipments.

The main heading is 'Receive Return Into "Web Store Warehouse" [ID:WebStoreWarehouse]' with a '[New Facility]' link. Below this, it says 'Receipt(s) For Return #10000'. A table displays the receipt data:

Receipt	Date	Return	Line	Product ID	Received
10011	2005-10-13 11:38:44.985	10000	00001	GZ-9290	1

Below the table, it states 'There are no items to receive.' At the bottom of the interface, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

A text box at the bottom of the screenshot contains the message: 'This Receipt is generated upon successfully "receiving" the product back into the facility.'

#### .2.11.3.2 link buttons

[New Facility] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

#### .2.11.3.3 Receipt(s) for Return #

Click on the Return number to edit the original Return.

#### .2.11.3.4 Receipt

The number for the Receipt for this line of the returns.

#### .2.11.3.5 Date

The Date and Time that the items were actually logged back into the Facility.

### .2.11.3.6 Return

The original Return ID.

### .2.11.3.7 Line

Which Line Item on the Return is actually being received here.

### .2.11.3.8 Product ID

The Product ID confirms which item was returned by it Product ID number.

### .2.11.3.9 Quantity

How many of the Product ID were physically received by the Facility.

### .2.11.3.10 '... Items to receive.'

If there were additional items in the Return which have not yet been received by the Facility, they will be listed here. When there are no more to receive, the statement reads, 'There are no items to receive.'

## .2.12 Picking tab

### .2.12.1 PicklistOptions

id:[DOCFAC2374] image:

OPEN FOR BUSINESS  
OFBiz.org

Welcome THE ADMINISTRATOR!  
2005-10-14 09:41:11.621  
English (United States) Set

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

Facility Manager Application  
Main Facilities Facility Groups Shipments Logout

Facility ContactMechs Groups Locations Roles Inventory Items Inventory Receive Inventory Xfers Receive Return **Picking**  
Packing Incoming Shipments Outgoing Shipments

Find Orders to pick [Picking Options](#) | [Manage Picklists](#) | [Stock Moves](#)

Shipment Method	Ready to pick	Need stock move	
Ground	1	0	Pick first: <input type="text" value="20"/> <a href="#">Create Picklist</a>
All methods	1	0	Pick first: <input type="text" value="20"/> <a href="#">Create Picklist</a>

W3C CSS  W3C XHTML 1.0

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Powered By OFBiz

Categories of Orders ready to be Picked are displayed at this Picking Options screen.

### .2.12.2 link buttons

[Picking Options] [Manage Picklists] [Stock Moves] [Create Picklist] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

## .2.12.3 Picking Options

After a [Create Picklist] button is selected, that line in the table no longer appears on this screen. Once a Picklist is created for a shipping method category, you can work it from the PicklistManage screen which follows.

### .2.12.3.1 Shipment Method

Specifies the shipping method such as Ground, Air, Next Day, etc.

### .2.12.3.2 Ready to pick

How many shipments are ready to pick?

### .2.12.3.3 Need stock move

The number indicates how many shipments need a stock move. Note that if there is a need for a stock move, you should first go to Stock Moves sub-tab for this item.

### .2.12.3.4 Pick first \_\_\_\_

Specify how many units to be picked at a time, e.g., the first 20, etc. If you are ready to work this item, click on [Create Picklist].

## .2.12.4 Manage Picklists

### .2.12.4.1 PickStarted

id:[DOCFAC2384] image:

The screenshot shows the 'Facility Manager Application' interface. At the top, there is a navigation menu with tabs: Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below the navigation is a header bar with the OFBiz logo and the text 'OPEN FOR BUSINESS OFBiz.org'. On the right side of the header, it says 'Welcome THE ADMINISTRATOR!' and '2005-10-14 10:10:23.996'. There is also a language dropdown menu set to 'English (United States)' and a 'Set' button.

The main content area is titled 'Facility Manager Application' and has sub-tabs: Main, Facilities, Facility Groups, Shipments, and Logout. Below these are several buttons: Facility, ContactMechs, Groups, Locations, Roles, Inventory Items, Inventory Receive, Inventory Xfers, Receive Return, Picking, Packing, Incoming Shipments, and Outgoing Shipments.

The 'Manage Picklists' section is active, showing a picklist with ID '10000' dated '2005-10-14 10:10:16.417'. It includes an 'Update' button, a 'created/modified by' field showing 'admin/admin', and a '[Pick/Pack Report]' button. There is also an 'Assign Picker' dropdown and an 'Add' button.

Below this, there is a section for 'Bin 1 Primary Order WS10022 Primary Ship Group 00001'. It shows an 'Update Bin' section with 'Location#: 1' and 'Picklist: 10000 [Date:2005-10-14 10:10:16.417, Status:Input]' and an 'Update' button. A table of items follows:

Order:Group:Item	WS10022:00001:00001	Product	GZ-2002	Inventory Item	10023	Location	----	Quantity	3
Order:Group:Item	WS10022:00001:00003	Product	WG-1111	Inventory Item	10033	Location	AA-01-BB-02-CC	Quantity	1
Order:Group:Item	WS10022:00001:00003	Product	WG-1111	Inventory Item	9005	Location	TL-TL-TL-LL-03	Quantity	2
Order:Group:Item	WS10022:00001:00059	Product	GZ-1006-1	Inventory Item	9021	Location	----	Quantity	1
Order:Group:Item	WS10022:00001:00060	Product	GZ-1006-1	Inventory Item	9021	Location	----	Quantity	1
Order:Group:Item	WS10022:00001:00061	Product	GZ-1006-1	Inventory Item	9021	Location	----	Quantity	1
Order:Group:Item	WS10022:00001:00062	Product	WG-1111	Inventory Item	10033	Location	AA-01-BB-02-CC	Quantity	1

At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

Although only one is shown here, all currently active Picklists will be displayed at this screen.

### .2.12.4.2 link buttons

[Picking Options] [Manage Picklists] [Stock Moves] [Update] [Add] [Pick/Pack Report] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

**.2.12.4.3 Discussion**

Within each Pick block, you have information provided to help the stock pickers find, assemble and group the product for the shipment. You can assign Pickers, change Status, identify or change the Bin number, and generate the Pick/Pack Report.

**.2.12.4.4 PicklistReportPage1**

id:[DOCFAC2386] image:

Picklist 10000 in Facility Web Store Warehouse [WebStoreWarehouse]

Location	Product ID	To Pick	Quantity to Bin#
AA-01-BB-02-CC	Micro Chrome Widget [WG-1111]	2	2 to #1
TL-TL-TL-LL-03	Micro Chrome Widget [WG-1111]	2	2 to #1
----	Open Gizmo (LGPL) [GZ-1006-1]	3	3 to #1
----	Square Gizmo [GZ-2002]	3	3 to #1

Pick report generated in PDF to give to Picker or supervisor.

**.2.12.4.5 PicklistReportPage2**

id:[DOCFAC2387] image:



Bin 1 to Pack, Order ID: WS10022, Ship Group ID: 00001

Order Item	Product ID	To Pack	Inventory Avail: Not Avail:
00001	Square Gizmo [GZ-2002]	3	10023:3:
00003	Micro Chrome Widget [WG-1111]	1	10033:1:
00003	Micro Chrome Widget [WG-1111]	2	9005:2:
00059	Open Gizmo (LGPL) [GZ-1006-1]	1	9021:1:
00060	Open Gizmo (LGPL) [GZ-1006-1]	1	9021:1:
00061	Open Gizmo (LGPL) [GZ-1006-1]	1	9021:1:
00062	Micro Chrome Widget [WG-1111]	1	10033:1:

The Pack report is generated together with the Pick report; give copy to Packer or his Supervisor.

## .2.12.5 Stock Moves needed (table)

As moves are confirmed, they are processed and the line on this table is removed.

### .2.12.5.1 PickMoveStock

id:[DOCFAC2392] image:



Welcome THE ADMINISTRATOR!  
2005-10-14 09:32:20.996

English (United States)

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

Facility Manager Application

Main Facilities Facility Groups Shipments Logout

Facility ContactMechs Groups Locations Roles Inventory Items Inventory Receive Inventory Xfers Receive Return Picking

Packing Incoming Shipments Outgoing Shipments

**Stock Moves Needed** [Picking Options](#) [Manage Picklists](#) [Stock Moves](#)

Product	From Location	To Location	Quantity	Confirm	Select all
Micro Chrome Widget [WG-1111]	TL:TL:TL:UL:03(Bulk)[TLTLTLUL03]	AA:01:BB:02:CC(Pick/Primary)[AA01BB02CC]	4	<input type="text" value="4"/>	<input type="checkbox"/>
Big Gizmo [GZ-8544]	TL:TL:TL:UL:02(Bulk)[TLTLTLUL02]	TL:TL:TL:LL:02(Pick/Primary)[TLTLTLL02]	15	<input type="text" value="15"/>	<input type="checkbox"/>
Micro Chrome Widget [WG-1111]	TL:TL:TL:UL:02(Bulk)[TLTLTLUL02]	TL:TL:TL:LL:03(Pick/Primary)[TLTLTLL03]	5	<input type="text" value="5"/>	<input type="checkbox"/>



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Here you will confirm stock movements and then authorize those movements in preparation for pending Stock Picks.

### .2.12.5.2 link buttons

[Confirm Selected Moves] [Picking Options] [Manage Picklists] [Stock Moves] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

### .2.12.5.3 Product

Shows both the name and the Product ID.

### .2.12.5.4 From Location

The physical Location where the item is being relocated FROM.

### .2.12.5.5 To Location

The physical Location where the item is being relocated TO.

### .2.12.5.6 Quantity

How many.

### .2.12.5.7 Confirm

Enter the actual number moved to Confirm the move.

### .2.12.5.8 Select All

To select all items in the row, click the checkbox in the header; else check just those to be moved at this time.

## .2.13 Packing tab

### .2.13.1 PackOrder-find

id:[13315] image:

The screenshot displays the 'Facility Manager Application' interface. At the top left is the 'OPEN FOR BUSINESS OFBiz.org' logo. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the timestamp '2005-10-14 11:56:04.933' and a language dropdown set to 'English (United States)' with a 'Set' button. A navigation bar contains tabs for Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below the navigation bar is a blue header for 'Facility Manager Application' with sub-tabs for Main, Facilities, Facility Groups, Shipments, and Logout. The main content area is titled 'Pack Order in Web Store Warehouse [ID:WebStoreWarehouse]'. It features an 'Order #' field with 'WS10022' and a 'Primary Ship Group Seq Idtruc' field with '00001', followed by a 'Hide Grid:' checkbox. A 'Pack Order' button is located below the form. At the bottom of the page, there are W3C CSS and W3C XHTML 1.0 logos, and a copyright notice: 'Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A text box at the very bottom of the screenshot contains the instruction: 'Enter the Order Number AND the 'Primary Ship Group Seq Idtruc' number from the createShipment screen to proceed.'

### .2.13.2 link buttons

[Pack Order]

### .2.13.3 Discussion

After items are Picked they must be Packed. But before they can be Packed, the shipping documentation must be ready. To confirm that the paperwork has processed, you must enter the 'Primary Ship Group Seq Idtruc' in the line after the Order Number (as shown in the screen above) and that Sequence number must exist in the system before the following screen appears.

### .2.13.4 Packing Process

#### .2.13.4.1 PackOrder-Found



**Facility Manager Application**  
Main | Facilities | Facility Groups | Shipments |

Pack Order in Web Store Warehouse [ID:WebStoreWarehouse]

Order #  /  Hide Grid:

Order # WS10022 / ShipGroup # 00001  
WS10022 / 00001

**Ship-To Address:**  
To: Sherry Shopper  
123 West Main Street  
Pleasant Grove, UT 84055  
USA

**Carrier/Shipping Method:**  
UPS GROUND

**Shipping Instructions:**

Product #  @

Current Package Sequence: 1

Item #	SKU	Description	Ordered Qty	Packed Qty	Pack Qty	Package
<input type="checkbox"/>	00001	GZ-2002 Square Gizmo	3	0	<input type="text" value="3"/>	<input type="button" value="Package 1"/>
<input type="checkbox"/>	00003	WG-1111 Micro Chrome Widget	3	0	<input type="text" value="3"/>	<input type="button" value="Package 1"/>
<input type="checkbox"/>	00059	GZ-1006-1 Open Gizmo (LGPL)	1	0	<input type="text" value="1"/>	<input type="button" value="Package 1"/>
<input type="checkbox"/>	00060	GZ-1006-1 Open Gizmo (LGPL)	1	0	<input type="text" value="1"/>	<input type="button" value="Package 1"/>
<input type="checkbox"/>	00061	GZ-1006-1 Open Gizmo (LGPL)	1	0	<input type="text" value="1"/>	<input type="button" value="Package 1"/>
<input type="checkbox"/>	00062	WG-1111 Micro Chrome Widget	1	0	<input type="text" value="1"/>	<input type="button" value="Package 1"/>

**Handling Instructions:**



Check the box on each line item to be packed, confirm the Pack Qty, and click [Pack Items].

**.2.13.4.2 link buttons**

[Pack Order] [Next Package] [Pack Item] [Pack Items] [Clear] [Complete]

### **.2.13.4.3 Shipping Information**

#### **.2.13.4.3.1 Ship-To Address**

Where the packages are headed.

#### **.2.13.4.3.2 Carrier / Shipping Method**

How the packages will be transported to the destination.

#### **.2.13.4.3.3 Shipping Instructions**

Additional instructions such as special handling, notification steps, whatever is outside the normal shipping procedures.

### **.2.13.4.4 Individual item processing**

When there is no Pack List as shown at the bottom of this screen, here is a method to pack item by item. Enter the Product ID and the quantity, then click [Pack Items] and go on to the next package.

### **.2.13.4.5 Pack List packing**

#### **.2.13.4.5.1 Item #**

The sequence number in the packing list.

#### **.2.13.4.5.2 SKU**

This would be the Product ID of the item being shipped.

#### **.2.13.4.5.3 Description**

Generally, the name of the Product being shipped.

#### **.2.13.4.5.4 Ordered Qty**

How many the customer is expecting to receive.

#### **.2.13.4.5.5 Packed Qty**

How many have been packed so far. Note: There may be incremental packing of orders when stock is not on hand for earlier attempts.

#### **.2.13.4.5.6 Pack Qty**

How many should be packed at this time.

#### **.2.13.4.5.7 Package**

Which package should the item go into? Select from the drop-down box.

### **.2.13.4.6 Handling Instructions**

Any special instructions to the Carrier are added here. Press the link [Complete] when you are finished with this screen.

## **.2.14 Scheduling tab**

### **.2.14.1 Discussion**

Under development.

### **.2.14.2 link buttons**

<B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>



### **.2.15 Incoming Shipments tab**

This tab takes you to the higher level, major tab **Shipments** with current Incoming Shipments listed in a table.

### **.2.16 Outgoing Shipments tab**

This tab takes you to the higher level, major tab **Shipments** with current Outgoing Shipments listed in a table.

## .3 Facility Groups

### .3.1 FindFacilityGroup

id:[DOCFAC2403] image:



Welcome THE ADMINISTRATOR!  
2006-05-01 13:09:04.078

English (United States)

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

Facility Manager Application  
Main Facilities Facility Groups Shipments Logout

#### Facility Group List

[\[New Group\]](#)

Facility Group Name [ID]	Facility Group Type	Description	
<a href="#">Call Center Administration [10000]</a>	Management Structure	Those exempt Parties responsible for managing the Call Center	<a href="#">[Edit]</a>
<a href="#">Call Center Employees [10001]</a>	Management Structure	All Employees assigned to the Call Center	<a href="#">[Edit]</a>
<a href="#">Call Center Staff [10002]</a>	Pricing Group	Non-exempt Staff (incl. Supervisors) performing direct CC duties	<a href="#">[Edit]</a>
<a href="#">Call Center Support Staff [10003]</a>	Pricing Group	Call Center non-exempt employees in a supporting role	<a href="#">[Edit]</a>



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Powered By OFBiz

All Facility Groups from any Facility are presented at this screen. Click the ID or [Edit] to proceed.

### .3.2 link buttons

[\[New Group\]](#) [\[Edit\]](#)

### .3.3 Table of existing groups

#### .3.3.1 Facility Group Name (ID)

Click on this Name and ID combination to edit the Group.

#### .3.3.2 Facility Group Type

This Type could be Management Structure, Pricing Group, Manufacturing Engineers, Labor Union, whatever is programmed into the system.

#### .3.3.3 Description

What differentiates this Group from all others?

### .3.4 New Group link

#### .3.4.1 EditFacilityGroup-new

**Facility Manager Application**

Main Facilities Facility Groups Shipments Logout

**Facility Group [ID:]**

[\[New Group\]](#)

Facility Group Type

Primary Parent Group

Name

Description



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Powered By [OFBiz](http://OFBiz)

Create a new Facility Group at this screen. Select a Type and identify its Parent group first.

### .3.4.2 link buttons

[\[New Group\]](#) [\[Update\]](#)

### .3.4.3 Facility Group Type (drop-down box)

Select from the drop-down box. This Type could be Management Structure, Pricing Group, Manufacturing Engineers, Labor Union, whatever is programmed into the system.

### .3.4.4 Primary Parent Group (drop-down box)

All the existing Facility Groups are given in the drop-down list. Select from one of these.

### .3.4.5 Name

Give it a short, distinctive (but not cryptic) Name.

### .3.4.6 Description

Differentiate this Group from any other Group. Allow for the possibility that there may be sub-groups nested under this one.

## .3.5 Edit Facility Group

### .3.5.1 EditFacilityGroup



**Facility Manager Application**

Main Facilities Facility Groups Shipments Logout

Facility Group Rollups Facilities Roles

**Facility Group Purchasing Cost Supervision [ID:10003]**

[\[New Group\]](#)

Facility Group ID **10003** This cannot be changed without re-creating the facility group

Facility Group Type

Primary Parent Group

Name

Description



Edit the top-level details of a Facility Group at this screen; choose sub-tabs for further details.

### .3.5.2 link buttons

[New Group] [Update] <B> [Facility Group] [Rollups] [Facilities] [Roles] </B>

### .3.5.3 (edit) Facility Group ...

#### .3.5.3.1 Facility Group ID ...

The assigned ID number with the given Name for this group. This cannot be changed without replacing the Group.

#### .3.5.3.2 Facility Group Type (drop-down box)

If this needs to be changed, select from the drop-down box. This Type could be Management Structure, Pricing Group, Manufacturing Engineers, Labor Union, whatever is programmed into the system.

#### .3.5.3.3 Primary Parent Group (drop-down box)

All existing Groups are listed in the drop-down box; a group can easily be re-assigned to another Group with this choice.

#### .3.5.3.4 Name

The Name can be changed here at any time.

#### .3.5.3.5 Description

This should be a functional description, not just titles or people's names, because the Group should be able to survive changes in personnel and organization re-structuring.

### .3.5.4 Rollups

#### .3.5.4.1 EditFacilityGroupRollup

id:[DOCFAC2424] image:



Welcome THE ADMINISTRATOR!  
2006-05-01 14:12:33.078

English (United States)

Accounting | Catalog | Content | Example | **Facility** | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Facility Manager Application

Main | Facilities | Facility Groups | Shipments |

Rollups For "Call Center Staff" [ID:10002]

FacilityGroup Rollup : Parent Groups

Parent Group [Id]	From Date	Thru Date/Time & Sequence	
<a href="#">Call Center Employees</a>	2006-05-01 14:07:31.468	<input type="text"/> <input type="button" value="Calendar"/> <input type="text"/>	<input type="button" value="Update"/> <input type="button" value="[Delete]"/>

Add **Parent** Group (select Category and enter From Date):

Group Rollup : Child Groups

Child Group ID	From Date	Thru Date/Time & Sequence	
<a href="#">Call Center Support Staff</a>	2006-05-01 14:12:08.906	<input type="text"/> <input type="button" value="Calendar"/> <input type="text"/>	<input type="button" value="Update"/> <input type="button" value="[Delete]"/>

Add **Child** Group (select Group and enter From Date) :



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Parent and Child relationships are established for the selected Group at this screen.

**.3.5.4.2 link buttons**

[New Group] [Update] [Delete] [Add] <B>[Facility Group] [Rollups] [Facilities] [Roles] </B>

**.3.5.4.3 FacilityGroup Rollup : Parent Groups**

**.3.5.4.3.1 Table of existing**

**.3.5.4.3.1.1 Parent Group ID**

Click on the ID link to edit the Parent.

**.3.5.4.3.1.2 From Date**

When the relationship was established.

**.3.5.4.3.1.3 Thru Date/Time and Sequence**

A thru-date indicates the termination of this relationship. Enter such a date only if the Parent relationship should end at that time. <BR> Sequence numbering would indicate priority or heirarchy within the set of Parents.

**.3.5.4.3.2 Add Parent Group**

**.3.5.4.3.2.1 Category (drop-down box)**

This assignment is for a Parent Category that will have responsibility for, oversight of, or authority over the primary Group. There may be more than one such Parent group.

**.3.5.4.3.2.2 From Date (popup calendar)**

Generally this will be Now (the default), but you may assign a future date for delayed assignment, or a previous date for historical purposes.

**.3.5.4.4 Group Rollup : Child Groups**

**.3.5.4.4.1 Table of existing**

**.3.5.4.4.1.1 Child Group ID**

Click on the ID to edit the Child Group.

**.3.5.4.4.1.2 From Date**

When the assignment was made.

**.3.5.4.4.1.3 Thru Date/Time and Sequence**

A thru-date indicates the termination of this relationship. Enter such a date only if the Child relationship should end at that time. <BR> Sequence numbering would indicate priority or heirarchy within the set of Children.

**.3.5.4.4.2 Add Child Group**

**.3.5.4.4.2.1 Category (drop-down box)**

All the existing Groups are shown in the list. If there is no Child Group, but there needs to be one, click the [New Group] link and create one; it will then appear in this list.

**.3.5.4.4.2.2 From Date (popup calendar)**

Generally this will be Now (the default), but you may assign a future date for delayed assignment, or a previous date for historical purposes.

**.3.5.5 Facilities**

**.3.5.5.1 EditFacilityGroupMembers**



Facility Manager Application

Main Facilities Facility Groups Shipments Logout

Facility Group Rollups **Facilities** Roles

Facilities for Call Center Employees [ID:10001]

[New Group] [Active and Inactive]

Facility-Group Member Maintenance

1 - 1 of 1

Facility Name [ID]	From Date & Time	Thru Date/Time & Sequence	
<a href="#">Catch the Calls [10000]</a>	2006-04-29 13:52:39.046	<input type="text"/> 1	[Update] [Delete]

1 - 1 of 1

Add FacilityGroupMember:

Facility ID :  From Date :  Add



Those Facilities within this Facility Group relationship are listed; add this Facility Group to another Facility with the tool.

### .3.5.5.2 link buttons

[New Group] [Active and Inactive (toggle)] [Update] [Delete] [Add] <B> [Facility Group] [Rollups] [Facilities] [Roles] </B>

### .3.5.5.3 Table-Group Member Maintenance

#### .3.5.5.3.1 Facility Name ID

Click on this ID and you will be at the Edit Facility screen.

#### .3.5.5.3.2 From Date and Time

When the assignment was made.

#### .3.5.5.3.3 Thru Date/Time

A thru-date indicates the termination of this relationship. Enter such a date only if the relationship should end at that time.

#### .3.5.5.3.4 Sequence

Sequence numbering would indicate priority or heirarchy among the Facilities.

### .3.5.5.4 Tool to Add FacilityGroupMember

#### .3.5.5.4.1 Facility ID

Enter the exact ID for the Facility.

#### .3.5.5.4.2 From Date

Defaults to Now. Set a future date if the membership is not to begin until later, or enter an earlier one for historical purposes.

### .3.5.6 Roles for facility group

#### .3.5.6.1 EditFacilityGroupRoles

id:[DOCFAC2452] image:

The screenshot shows the 'Facility Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below the navigation bar, there is a header for 'Facility Manager Application' with sub-tabs for Main, Facilities, Facility Groups, and Shipments. The main content area displays the 'Roles' section for 'Call Center Administration' [ID :10000]. It includes a '[New Group]' button, a table with columns 'Party ID' and 'Role Type', and an 'Add FacilityGroup Party Role' form with input fields for 'Party ID' (containing 'CallCenter') and 'Role Type' (containing 'Department'), and an 'Add' button. The footer contains logos for W3C CSS and W3C XHTML 1.0, and a copyright notice for 2001-2006 The Open For Business Project.

Add or delete Party associations with the Facility Group from this screen.

#### .3.5.6.2 link buttons

[New Group] [Delete] [Add] <B>[Facility Group] [Rollups] [Facilities] [Roles] </B>

#### .3.5.6.3 Table of existing roles

##### .3.5.6.3.1 Party ID

Click on the Party ID to go to the Party Manager for editing this Party.

##### .3.5.6.3.2 Role Type

Describes the role played by the Party in this Group relationship.

#### .3.5.6.4 Tool to Add FacilityGroup Party Role

##### .3.5.6.4.1 Party ID

Enter an existing Party ID.

##### .3.5.6.4.2 Role Type (drop-down box)

Select from the drop-down box.



## **.4 Shipments**

Under the Shipments tab, entering the Primary Order ID number and clicking on [Update] will populate the screen with data already established for that Order. Once the system recognizes the Primary Order with which you are working, it will maintain that order while you move between the various tabs.

### **.4.1 Shipments Process**

#### **.4.1.1 Create the Shipment**

Step 1 - In the Facility Manager: an empty shipment is created.

#### **.4.1.2 Assign items to the Shipment**

Step 2 - In the Facility Manager: order items (also from different orders) are assigned to the shipment. These are all the products that we want to produce within a given period to meet the shipment's estimated ship date.

#### **.4.1.3 Status changed to Scheduled**

Step 3 - Facility Manager: when the shipment plan is complete (i.e. all the products that we want to group together have been added) the shipment's status is changed to 'Scheduled'.

#### **.4.1.4 Scheduled Shipments displayed**

Step 4 - Manufacturing manager: under the 'Shipment Plans' tab, all the scheduled shipments are shown. This is what is described in the Manufacturing Reference under Shipment Plans - Table.

#### **.4.1.5 Analyze needs for manufacturing**

Step 5 - Manufacturing Manager: from the Shipment Plan > Detail page, you can generate a PDF report to help analyze the amount of materials (products) needed. From this you are better able to manufacture or assemble all the products in the shipment plan against the inventory levels of materials in the warehouse.

#### **.4.1.6 Resource adjustments**

Step - 6 Manufacturing Manager: if there are not enough materials in the warehouse, the manufacturing process must be placed on hold. Through Purchase Orders (using the Order Manager) you should order any of the materials needed. <P> If material or components are not available, adjust the schedule to exclude the affected products from the shipment plan.

#### **.4.1.7 Create Production Runs**

Step - 7 Manufacturing Manager: when you are sure that you have enough materials in your Warehouse to complete the manufacturing process, go to the JobShop screens and click on [Create all Production Runs]. All the production runs will be automatically created and they will have the same name SP\_{shipmentPlanId} to make it easier to group them. At least one production run for each Shipment Plan item will be created.

#### **.4.1.8 Monitor from the Job Shop**

Step - 8 Manufacturing Manager: monitor and control each Production Run in the JobShop screens as usual.

#### **.4.1.9 Manufactured products moved to Warehouse**

Step-9 Manufacturing Manager: when a production run is completed, the finished (manufactured) products are put into the warehouse.

#### **.4.1.10 Completion**

Step - 10 Manufacturing Manager: when all the production runs linked to the shipment plan are completed, the shipment plan is finished.

#### **.4.1.11 Release shipments**

Step - 11 Facility Manager: in the shipment page, issue all products from the Warehouse as a normal shipment. Do

this with confidence that all the products are in the warehouse, having been manufactured by the Production Runs.

## **.4.2 New Shipment**

### **.4.2.1 Discussion**

'New' Shipments are not actually created here but through the ordering process. The purpose of this section (which only appears if unfulfilled orders exist) is to update the information in that Shipment ID established during the ordering process. <P>To come to this screen, in your new order page after clicking on the new Order Number, click on the link [New Shipment For Ship Group [00001]]. Immediately click on [Update] and the system will populate what information it already has. Enter the other details that you know, then click on [Update] again to save the data you have entered. <p> Note: the 'Primary Ship Group Seq Idtruc' needs to be entered under the Picking and Packing tabs to complete those aspects of the shipping process.

### **.4.2.2 EditShipment**



**Facility Manager Application**

Main | Facilities | Facility Groups | Shipments | [Logout](#)

Shipment type Id

Status Id

Primary Order ID

Primary Ship Group Seq Idtruc

Estimated Ready Date

Estimated Ship Date

Estimated Ship Work Eff Id

Estimated Arrival Date

Estimated Arrival Work Eff Id

Latest Cancel Date

Estimated Ship Cost

Currency Uom Id

Handling Instructions

Origin Facility

Destination Facility

Origin Postal Address Id  -[To: , Attn: , , , , , ]-

Origin Phone Number Id  -[ ]-

Destination Postal Address Id  -[To: , Attn: , , , , , ]-

Destination Phone Number Id  -[ ]-

To Party  -[ ]-

From Party  -[ ]-



The first screen after clicking on the [New Shipment For Ship Group ...] link in the completed Order screen.

### 4.2.3 link buttons

[Update]

### 4.2.4 Shipment ID

Generated when the shipment is created; cannot be changed. This number will not appear until after you have clicked on the [Update] link the first time.

### 4.2.5 Shipment Type ID(drop-down box)

'Shipment' by definition means the relocation of items. It could be incoming stock, you returning merchandise to a vendor, the shipment of product as part of a sale, etc. This drop-down box could have the following selections:

<B><p> Incoming <br> Outgoing <br> Sales Return <br> Sales Shipment <br> Purchase Shipment <br> Purchase Return <br> Drop Shipment <br> Transfer</B>

#### **.4.2.6 Status ID (drop-down box)**

1. Be very sure of any changes to the status of this order before making a change to this status. <P> 2. Status could be any of the following: <br><B> ...</B> (meaning 'undetermined') <br> Input <br> Scheduled <br> Picked <br> Packed <br> Shipped <br> Delivered <br> Canceled </B>

#### **.4.2.7 Primary Order ID**

Should have been automatically populated when this screen was pulled up.

#### **.4.2.8 Primary Ship Group Seq Idtruc**

When an order is divided among multiple recipients, each recipient's portion of the order is processed as a Ship Group. This number identifies which of those groups is being reported here. This number is asked for when you are working in the Picking and Packing sections of the Facility manager.

#### **.4.2.9 Estimated Ready Date**

If shipment depends upon completion of another event, indicate here when the product will be available to fulfill this shipment.

#### **.4.2.10 Estimated Ship Date**

If shipment depends upon completion of another event, indicate here when the product will be available to ship.

#### **.4.2.11 Estimated Ship Work Eff ID**

This is the calendar event under the Work Effort manager, automatically generated when the this Shipment is successfully Updated.

#### **.4.2.12 Estimated Arrival Date (popup calendar)**

When you can confidentially estimate when the shipment should arrive, enter the date here.

#### **.4.2.13 Estimated Arrival Work Eff ID**

An Arrival Event has been created by the order process in the Work Effort Manager - Calendar section. Click on this number to go to that Event to edit or modify the Calendar Event Details.

#### **.4.2.14 Latest Cancel Date (popup calendar)**

This would be the latest date the order can be canceled before it is committed to the shipping company.

#### **.4.2.15 Estimated Ship Cost**

Cost of shipping, generally as set forth on the Order form. Expressed in the currency set forth below under Currency UOM ID.

#### **.4.2.16 Currency Uom ID**

The national currency forming the basis of this order.

#### **.4.2.17 Handling Instructions**

Any instructions for handling outside of the normal procedures can be documented here.

#### **.4.2.18 Origin Facility (drop-down box)**

Generally populated automatically when this order is created, you can select from any of the existing Facilities from the drop-down box. Would be useful especially if the order originated with one facility but must be fulfilled from another.

#### **.4.2.19 DestinationFacility (drop-down box)**

If the shipment is not going to a customer but rather to another Facility, select it from the drop-down list.

#### **.4.2.20 Origin Postal Address ID**

This is the ID established in the Party Manager for the Postal Address of the originating Facility.

#### **.4.2.21 Origin Phone Number ID**

This is the ID established in the Party Manager for the Phone Number of the originating Facility.

#### **.4.2.22 Destination Postal Address ID**

This is the ID established in the Party Manager for the Postal Address of the destination.

#### **.4.2.23 Destination Phone Number ID**

This is the ID established in the Party Manager for the Phone Number of the destination.

#### **.4.2.24 To Party**

The Party ID of the Party receiving the shipment.

#### **.4.2.25 From Party**

This would generally be the ID of the Facility from which the shipment originates.

#### **.4.2.26 Created Date**

Date this Shipment document was created.

#### **.4.2.27 Created By User Login**

The User Login of the party creating this Shipment document.

#### **.4.2.28 Last Modified Date**

Each time this Shipment document is modified, the date will be updated here.

#### **.4.2.29 Last Modified By User Login**

The User Login of whomever last modified this Shipping document.

### **.4.3 Find Shipment(s)**

#### **.4.3.1 FindShipment**



Facility Manager Application  
Main | Facilities | Facility Groups | Shipments | Logout

Find Shipment(s) New Shipment | Lookup Shipment(s)

Shipment Id :

Shipment Type :

Origin Facility :

Destination Facility :

Status :

Date Filter :  From  Thru

Shipments Found Previous | 1 - 5 of 5 | Next

Shipment Id	Type	Status	Origin Facility	Dest. Facility	Ship Date	
<a href="#">10000</a>	Sales Shipment	Shipped	Web Store Warehouse [WebStoreWarehouse]	[]		<a href="#">View</a>
<a href="#">10001</a>	Sales Shipment	Shipped	Web Store Warehouse [WebStoreWarehouse]	[]		<a href="#">View</a>
<a href="#">10010</a>	Sales Shipment	Picked	Web Store Warehouse [WebStoreWarehouse]	[]		<a href="#">View</a>
<a href="#">10021</a>	Sales Shipment	Picked	[]	[]		<a href="#">View</a>
<a href="#">10022</a>	Sales Shipment	Input	Web Store Warehouse [WebStoreWarehouse]	[]		<a href="#">View</a>



The top "Find Shipments" part of this screen greets you upon opening the Shipments tab. Results are shown at the bottom for a successful search on type "Sales Return." Click on the Shipment ID or [View] to proceed with editing.

### .4.3.2 link buttons

[New Shipment] [Lookup Shipments] [View] [Previous] [Next]

### .4.3.3 Shipment ID

If you know the Shipment ID here, enter it here.

### .4.3.4 Shipment Type (drop-down box)

Select from among the following types: <P></B> --- <br> Any Shipment Type <br> Drop Shipment <br> Incoming <br> Outgoing <br> Purchase Return <br> Purchase Shipment <br> Sales Return <br> Sales Shipment <br> Transfer</B>

### .4.3.5 Origin Facility (drop-down box)

Select a facility from the drop-down list.

### .4.3.6 Destination Facility (drop-down box)

Select a facility from the drop-down list.

### **.4.3.7 Status (drop-down box)**

Select a status from among the following: <P> <B> Any Shipment Status <br> Input <br> Scheduled <br> Picked <br> Packed <br> Shipped <br> Delivered <br> Cancelled</B>

### **.4.3.8 Date Filter**

#### **.4.3.8.1 From (popup calendar)**

In the top (From) line, enter the earliest date the Shipment you are looking for could have originated.

#### **.4.3.8.2 Thru (popup calendar)**

In the bottom line, enter the latest date the shipment could have been created.

### **.4.3.9 <B>Shipments Found</B>**

All the shipments meeting the criteria you have entered will be listed here. If none appear, try to search with fewer criterium. So long as one of the search parameters is specified (for example, 'Sales Shipments'), there should be returns.

#### **.4.3.9.1 Shipment ID**

Click on the ID to see this Shipment under the View tab; same effect as clicking on the [View] link at the end of the line.

#### **.4.3.9.2 Type**

Will be from among one of the following:</B><br> --- <br> Any Shipment Type <br> Drop Shipment <br> Incoming <br> Outgoing <br> Purchase Return <br> Purchase Shipment <br> Sales Return <br> Sales Shipment <br> Transfer</B>

#### **.4.3.9.3 Status**

Will be from among the following: <br> <B> Any Shipment Status <br> Input <br> Scheduled <br> Picked <br> Packed <br> Shipped <br> Delivered <br> Cancelled</B>

#### **.4.3.9.4 Origin Facility**

The Facility where the Shipment originated from.

#### **.4.3.9.5 Dest. Facility**

If being sent to an established Facility ID, this will be shown here.

#### **.4.3.9.6 Ship Date**

If already shipped or scheduled, the shipping date will be here.

## **.4.4 (Shipments handling tabs)**

Once the specific shipment has been selected, you are taken to these screens for managing the details of the shipment.

### **.4.4.1 View**

Except for the link [Generate Shipment Manifest Report], this screen is primarily to provide an overview of all the current details on the selected Shipment. As you select any of the other tabs, the appropriate information will be populated within those screens for this shipment. You can always return to this tab to review all the details again in one place.

#### **.4.4.1.1 ViewShipment**



**Facility Manager Application**

Main | Facilities | Facility Groups | Shipments |

**Generate Shipment Manifest Report**

**Shipment Id** 10022  
**Shipment Type** Sales Shipment  
**Status** Input  
**Primary Order ID** WS10030  
**Primary Ship Group Seq ID** 00001  
**Estimated Dates** **Ready:** **Ship:** **Arrival:**  
**Latest Cancel Date**  
**Estimated Ship Cost** 3.6  
**Handling Instructions**  
**Facilities** **Origin:** Web Store Warehouse [WebStoreWarehouse]  
**Destination:** []  
**Parties** **To:** Sherry Shopper [10040] **From:** []  
**Addresses** **Origin:** 9200 [To : Company XYZ, Attn : ZJAA, 2003 Open Blvd, , Orem, UT, 84058, USA]  
**Destination:** 10000 [To : Sherry Shopper, Attn : , 123 West Main Street, , Pleasant Grove, UT, 84055, USA]  
**Phone Numbers** **Origin:** 9201  
**Destination:**  
**Created** By [admin] On 2005-10-15 12:47:52.125  
**Last Updated** By [admin] On 2005-10-15 12:47:53.125

Segment	Carrier Shipment Method Origin-Destination Facility Origin-Destination Address ID Origin-Destination Phone ID	Carrier Status Tracking Number Estimated (Start-Arrive) Actual (Start-Arrive)	Billing Weight & UOM Currency UOM Actual Transport Actual Services Actual Other Actual Total
00001	UPS [UPS] Ground Origin : Web Store Warehouse [WebStoreWarehouse] Dest : [] Origin : Dest: <b>10000</b> [To : Sherry Shopper, Attn : , 123 West Main Street, , Pleasant Grove, UT, 84055, USA] Origin : Dest :	[ - ] [ - ]	[]



This will always present the most current details of the Order Shipment. Picking and Packing items will appear until complete.

### .4.4.1.2 link buttons

[Generate Shipment Manifest Report] <B>[View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]</B>

### .4.4.1.3 Shipment particulars

#### .4.4.1.3.1 Shipment ID

The number generated by the system to identify this shipment.

#### .4.4.1.3.2 Shipment Type

What type of shipment is presented with one of these IDs: <B><br> Incoming <br> Outgoing <br> Sales Return <br> Sales Shipment <br> Purchase Shipment <br> Purchase Return <br> Drop Shipment <br> Transfer</B>



#### **.4.4.1.3.3 Status**

#### **.4.4.1.3.4 Primary Order ID**

Which Sales Order or Purchase Order led to the creation of this shipment.

#### **.4.4.1.3.5 Primary Ship Group Seq ID**

When an order is divided among multiple recipients, each recipient's portion of the order is processed as a Ship Group. This number identifies which of those groups is being reported here.

#### **.4.4.1.3.6 Estimated Dates**

##### **.4.4.1.3.6.1 Ready**

When the elements of the shipment should be ready to be picked up by the Carrier.

##### **.4.4.1.3.6.2 Ship**

When the Carrier is expected accept the shipment.

##### **.4.4.1.3.6.3 Arrival**

When the shipment should arrive at its destination.

#### **.4.4.1.3.7 Latest Cancel Date**

The latest possible date that this Shipment can be stopped from processing through the system to the Carrier.

#### **.4.4.1.3.8 Estimated Ship Cost**

What the shipment is expected to cost.

#### **.4.4.1.3.9 Handling Instructions**

Any extra instructions for handling the shipment or its contents.

#### **.4.4.1.3.10 Facilities**

##### **.4.4.1.3.10.1 Origin**

The Facility from where the shipment is originating.

##### **.4.4.1.3.10.2 Destination**

If destined to another Facility, which one.

#### **.4.4.1.3.11 Parties**

##### **.4.4.1.3.11.1 To:**

The Party ID of the recipient of the Shipment.

##### **.4.4.1.3.11.2 From:**

If other than a Facility, such as with a Purchase Return, the ID of the party from whom the Shipment is coming.

#### **.4.4.1.3.12 Addresses**

##### **.4.4.1.3.12.1 Origin:**

Address from where the Shipment is being sent.

##### **.4.4.1.3.12.2 Destination:**

Address to where the Shipment is being sent.

#### **.4.4.1.3.13 Phone Numbers**

**.4.4.1.3.13.1 Origin**

Phone number at the place where the Shipment is coming.

**.4.4.1.3.13.2 Destination**

Phone number at the place to which the Shipment is headed.

**.4.4.1.3.14 Created by and date**

Who created this Shipment and when.

**.4.4.1.3.15 Last Updated by and date**

Each time the Shipment is changed, the Party making a change and when the change was made are recorded here.

**.4.4.1.4 Item details**

The details of the Shipment will appear here until the items are picked and packed into shipping packages.

**.4.4.1.5 Package details (vary)**

As the Packages are assembled and packed, the contents will appear here until complete. Once the Packages are gathered into a Shipment, they will no longer appear.

**.4.4.1.6 Shipping details (vary by carrier)**

Once the Packages are assembled into a Shipping Segment, details of that appear here.

**.4.4.2 Edit**

**.4.4.2.1 EditShipment-Updated**



Facility Manager Application

View Edit Shipment Plan Order Items Items Packages Route Segments

Generate Shipment Manifest Report

Shipment Id  -[This cannot be changed without re-creating the Shipment]-

Shipment type Id

Status Id

Primary Order ID

Primary Ship Group Seq Idtruc

Estimated Ready Date

Estimated Ship Date

Estimated Ship Work Eff Id

Estimated Arrival Date

Estimated Arrival Work Eff Id

Latest Cancel Date

Estimated Ship Cost

Currency Uom Id

Handling Instructions

Origin Facility [WS10030]

Destination Facility

Origin Postal Address Id  -[To: Company XYZ, Attn: ZJAA, 2003 Open Blvd, , Orem, UT, 84058, USA]-

Origin Phone Number Id  -[ 801 555-5555]-

Destination Postal Address Id  -[To: Sherry Shopper, Attn: , 123 West Main Street, , Pleasant Grove, UT, 84055, USA]-

Destination Phone Number Id  -[ ]-

To Party  -[Sherry Shopper ]-

From Party  -[ ]-

Created Date 2005-10-15 12:47:52.125

Created By User Login admin

Last Modified Date 2005-10-15 15:29:02.203

Last Modified By User Login admin

Update



After pressing the [Update] button, this screen reflects all the known information to this point. Edit here as needed.

.4.4.2.2 link buttons

[Generate Shipment Manifest Report] [Update] <B>[View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]</B>

### .4.4.2.3 Discussion

These fields were each discussed above under 'New Shipment.'

### .4.4.2.4 Estimated Arrival Work Eff Id

id:[DOCFAC2556] image:

The screenshot displays the 'WorkEffort Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below this is a sub-navigation bar with Main, TaskList, Calendar, Projects, Request List, and Logout. The main content area is titled 'Calendar Event Details' and contains a form for editing an event. The form fields include: Event Name (Shipment # Arrival), Priority (dropdown), Event Status (Tentative), Location (text input), Description (text area), Start Date/Time (calendar icon), End Date/Time (calendar icon), Revision # (1), Created (2005-08-25 08:31:29.156 by admin), and Last Modified (2005-08-25 08:31:29.156 by admin). There is an 'Update' button at the bottom of the form. The page footer includes logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org. Powered By OFBiz.

This is a view of the Work Effort event ID - updates the calendar with changes.

### .4.4.3 Shipment Plan

#### .4.4.3.1 EditShipmentPlan-find



Facility Manager Application

Shipment Plan

Order ID

Shipment Item Seq Id	Order ID	Order Item	Product ID	Quantity	Issued Quantity	Tot Ordered Quantity	Not Available	Tot Planned Quantity	Tot Issued Quantity	Weight	UOM	Volume	UOM
-------------------------	-------------	---------------	---------------	----------	--------------------	-------------------------	------------------	-------------------------	------------------------	--------	-----	--------	-----

Total weight: 0  
Total volume: 0



Enter the Order ID and click on [Submit] to bring up the Shipment Plan.

**.4.4.3.2 link buttons**

[Submit] [Shipment Plan --> Order Items] <B>[View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments] </B>

**.4.4.3.3 Order ID**

Enter the ID of the order here, then click [Submit] to view the Shipment Plan.

**.4.4.3.4 Shipment Plan - edit screen**

**.4.4.3.4.1 EditShipmentPlan**



**Facility Manager Application**  
Main Facilities Facility Groups Shipments Logout

**Shipment Plan**

Order ID

Order ID	Order Item	Product ID	Ordered Quantity	Planned Quantity	Issued Quantity	Quantity	Weight	UOM	Volume	UOM
WS10030	00001	WG-1111	2	0	0	<input type="text" value="2"/>	2		0	
WS10030	00002	WG-1111	1	0	0	<input type="text" value="1"/>	2		0	

Shipment Item Seq Id	Order ID	Order Item	Product ID	Quantity	Issued Quantity	Tot Ordered Quantity	Not Available	Tot Planned Quantity	Tot Issued Quantity	Weight	UOM	Volume	UOM
----------------------	----------	------------	------------	----------	-----------------	----------------------	---------------	----------------------	---------------------	--------	-----	--------	-----

Total weight: 0  
Total volume: 0



View the items planned for shipment from this screen. The link [Shipment Plan --> Order Items] takes you to the next step.

**.4.4.3.4.2 link buttons**

[Submit] [Add] [Shipment Plan --> Order Items] <B> [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments] </B>

**.4.4.3.4.3 Order ID**

The original Order number.

**.4.4.3.4.4 Order Item**

Which of the items is being presented on this line.

**.4.4.3.4.5 Product ID**

The ordered Product as called for on this line of the Order.

**.4.4.3.4.6 Ordered Quantity**

How many were ordered or added to the Order by a Promotion on this line.

**.4.4.3.4.7 Planned Quantity**

How many you plan to ship with this order. This will be changed when the Issued Quantity is equal to the Ordered Quantity through the subsequent processes. Your capacity to fulfill this item of the order will be limited by inventory and other restrictions.

**.4.4.3.4.8 Issued Quantity**

As the items are issued elsewhere, this number will change.

#### **.4.4.3.4.9 Quantity change window**

You can edit this field to reflect the quantity you wish to fulfill. The quantity populated here is what the system expects to issue.

#### **.4.4.3.4.10 Weight**

Weight per unit of product.

#### **.4.4.3.4.11 (Weight) UOM**

Whether the weight is measured in grams, ounces, pounds or kilograms should be indicated here.

#### **.4.4.3.4.12 Volume**

If the volume of the product is an issue in shipping, it should be given here.

#### **.4.4.3.4.13 (Volume) UOM**

Unit of measure for the volume: cubic centimeters, cubic inches, etc.

### **.4.4.3.5 Sequence Items**

If the Shipment Plan includes subordinate Sequence Items, they will be displayed in this table under the following headings: <B><p> ProductShipmentItemSeqID<br> Order ID <br> Order Item <br> Product ID <br> Quantity <br> Issued Quantity <br> Total Ordered Quantity <br> Not Available <br> Total Planned Quantity <br> Total Issued Quantity <br> Weight <br> UOM <br> Volume <br> UOM </B>

### **.4.4.3.6 Shipment Plan --> Order Items link**

Takes you to the next tab --> 'Order Items' with this Shipment Plan.

## **.4.4.4 Order Items**

### **.4.4.4.1 AddItemsFromOrder**



**Facility Manager Application**  
Main Facilities Facility Groups Shipments Logout

Order ID :   Ship Group ID :

**Add Items to Shipment: [10022]; from Order: [WS10030], Ship Group: [00001]**

**NOTE: Order Type is Sales.**

**Origin Facility is: Web Store Warehouse [WebStoreWarehouse]**

**NOTE: Order Status is Approved.**

Order ID/Ship Group/Order Item	Product	Items Issued or Reserved	[Issued + Reserved=Total]=Ordered	Reserved	Not Available	Issue	Submit ? All <input type="checkbox"/>
WS10030 / 00001 / 00001	Micro Chrome Widget [WG-1111]		[0 + 2 = 2] = 2				
		10036 [Web Store Warehouse]		2		<input type="text" value="2"/>	<input type="checkbox"/>
WS10030 / 00001 / 00002	Micro Chrome Widget [WG-1111]		[0 + 1 = 1] = 1				
		10036 [Web Store Warehouse]		1		<input type="text" value="1"/>	<input type="checkbox"/>



If not already populated in the table, associate the Order ID with the Ship Group ID number, then click [Select].

**.4.4.4.2 link buttons**

[Select] [Issue All] <B>[View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments] </B>

**.4.4.4.3 Discussion**

First you Select the Order ID and the Ship Group ID; next you check the boxes for items you want to Issue and click on the [Issue] button. That will take you to the following screen.

**.4.4.4.4 Add Items to Shipment**

Once you have selected (to confirm) the items for this Plan, click on [Issue All] to be taken to the next screen.

**.4.4.4.4.1 issueOrderItemShipGrpInvResToShipment**





**Facility Manager Application**  
Main Facilities Facility Groups Shipments Logout

Order ID :

**Add Items to Shipment: [10022]; from Order: [WS10030], Ship Group: [00001]**

NOTE: Order Type is Sales.

Origin Facility is: Web Store Warehouse [WebStoreWarehouse]

NOTE: Order Status is Completed, there should be no items left to issue from this order.

Order ID / Ship Group / Order Item	Product	Items Issued or Reserved	[Issued + Reserved=Total]=Ordered	Reserved	Not Available	Issue	Submit ? All <input type="checkbox"/>
WS10030 / 00001 / 00001	Micro Chrome Widget [WG-1111]	[2]10022:00001 On [2005-10-15 17:02:45.187] By [admin]	[2 + 0 = 2] = 2				
WS10030 / 00001 / 00002	Micro Chrome Widget [WG-1111]	[1]10022:00001 On [2005-10-15 17:02:46.265] By [admin]	[1 + 0 = 1] = 1				



This screen confirms the issuance or reservation of items; upon completion the order moves forward.

**.4.4.4.4.2 link buttons**

[Select] [Issue All] <B> [View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments] </B>

**.4.4.4.4.3 Order ID / Ship Group / Order Item**

Identifies the Item in relation to the Ship Group and the Order ID.

**.4.4.4.4.4 Product**

Confirms the Product ID for this Item.

**.4.4.4.4.5 Items Issued or Reserved**

Gives the quantity [in brackets], and the action numbers which resulted in this Issue or Reservation of product.

**.4.4.4.4.6 {Issued + Reserved=Total} = Ordered**

Portrays the math for the relationship between Issued, Reserved, their combined Total with the amount Ordered.

**.4.4.4.4.7 Reserved**

States how many are Reserved against future stock receipts or production, if any.

**.4.4.4.4.8 Not Available**

Shortages against the Ordered quantity are stated here, if any.

**.4.4.4.4.9 Issue**

Before the items were issued above, this reflected the intended Issue which has since been fulfilled.

**.4.4.4.4.10 Submit All? (Check box)**

This is the column where boxes could be checked to approve the submittal of the items on this line.

## .4.4.5 Items

### .4.4.5.1 Items

Presentation of this screen dependent upon nature and type of order. You may be able to add another product to the order from this screen.

### .4.4.5.2 EditShipmentItems

id:[DOCFAC2604] image:

The screenshot shows the 'Facility Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below this is a sub-navigation bar with Main, Facilities, Facility Groups, and Shipments. The main content area has a table with columns for Item, Quantity, and a Delete button. The table contains three rows of data for 'Micro Chrome Widget' with quantities 3, 2, and 1. Below the table is a form to 'Add to Package' with a dropdown menu set to 'New' and an 'Add' button. At the bottom, there is a 'New Item' section with fields for Product ID and Description, and a 'Create' button. The interface also includes a 'Logout' button and a 'Welcome THE ADMINISTRATOR!' message with the date and time '2005-10-15 17:16:08.796'. A language dropdown is set to 'English (United States)' with a 'Set' button. At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

Add, confirm or delete Shipment Items for the shipping Package here.

### .4.4.5.3 link buttons

[Add] [Delete] [Create] <B>[View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments] </B>

### .4.4.5.4 Item

Original Item number from the Order.

### .4.4.5.5 (item details)

Specifics on the Order Item are given here. In this case, the customer requested that each item be in a separate package. Furthermore, while only 2 were ordered, there was a promotional giveaway for the identical item, resulting in a total of 3. <P> There is also a place to add another item if needed. This way if the customer calls in an additional order during the shipping process, it can be added to the original order without having to re-create the entire set.

### .4.4.5.6 Quantity

You MUST click to Add the Items into the package before this can proceed to the Packing stage.

### .4.4.5.7 Other details

Transaction dates and other details can be shown here.

## .4.4.6 Packages

### .4.4.6.1 EditShipmentPackages

id:[DOCFAC2610] image:

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Welcome THE ADMINISTRATOR!  
2005-10-15 17:26:03.578  
English (United States) Set

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

Facility Manager Application  
Main Facilities Facility Groups Shipments Logout

View Edit Shipment Plan Order Items Items **Packages** Route Segments

Package	Created				
00001	2005-10-15 17:24:01.5	Weight: <input type="text" value="6"/>	Weight Unit: <input type="text" value="Pound (avdp)"/>	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
	Item :00001	Quantity :3			<input type="button" value="Delete"/>
	Add From Item : <input type="text" value="00001"/>	Quantity : <input type="text" value="0"/>		<input type="button" value="Add"/>	

W3C CSS W3C XHTML 1.0

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Powered By OFBiz

Setting the Shipment Package information such as weight and tracking numbers.

### .4.4.6.2 link buttons

[Update] [Delete] [Add] <B>[View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments] </B>

### .4.4.6.3 Package #

The assigned Package number; there could be several in a shipment.

### .4.4.6.4 Created

Format: YYYY-MM-DD time

### .4.4.6.5 Other details

This illustration shows one possible presentation. You could be asked for weight information, tracking number, other details depending upon the nature of the shipment.

## .4.4.7 Route Segments

Only enter the details which apply to the shipping route and method chosen for this shipment. Details will vary depending upon carrier, method, route, and priority.

### .4.4.7.1 EditShipmentRouteSegments



**Facility Manager Application**

[Main](#) [Facilities](#) [Facility Groups](#) [Shipments](#) [Logout](#)

[View](#) [Edit](#) [Shipment Plan](#) [Order Items](#) [Items](#) [Packages](#) [Route Segments](#)

Segment	Carrier Shipment Method Origin-Destination Facility Origin-Destination Address ID Origin-Destination Phone ID	Carrier Status Tracking Number Estimated (Start-Arrive) Actual (Start-Arrive)	Billing Weight & UOM Currency UOM Actual Transport Actual Services Actual Other Actual Total		
00001	UPS [UPS] Ground Web Store Warehouse [WebStoreWarehouse] 10000 [To: Sherry Shopper,Attn: , 123 West Main Street, , Pleasant Grove, UT, 84055, USA] <input type="text"/> <input type="text"/>	<a href="#">Confirm Shipment with UPS</a> Not Started <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
New Segment :	<input type="text"/> Air <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="button" value="Create"/>	



Enter and update Shipment Route Segment information. The Plan as shown here is not yet completed.

**.4.4.7.2 link buttons**

[Confirm ...] [Update] [Delete] [Create] <B>[View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments] </B>

**.4.4.7.3 Segment #**

Each Segment is dealt with independently.

**.4.4.7.4 Shipping details (drop-down boxes)**

Complete as far as possible.

**.4.4.7.5 Carrier details (popup calendars)**

Use the drop-down boxes and popup calendars.

#### **.4.4.7.6 Billing details (drop-down boxes)**

Use the drop-down boxes. When all is completed, click on the [Update] box.