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 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.

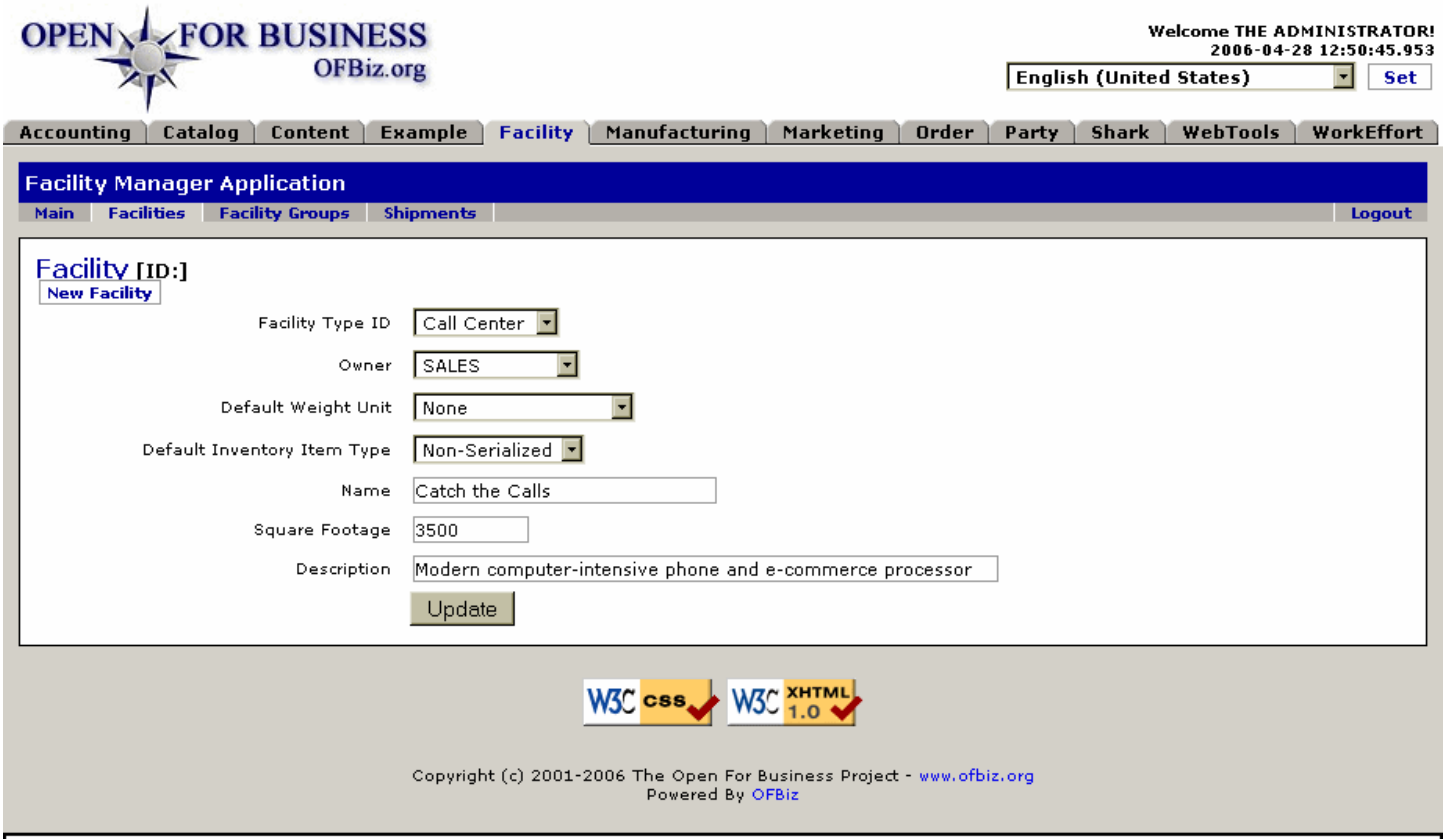
.2.1.3.7 Description

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

.2.2 Create a New Facility

.2.2.1 EditFacility-New

id:[DOCFAC2102] image:



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.
 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> ---
 Building
 Floor
 Office
 Call Center
 Plant
 Room
 Retail Store
 Warehouse</B>

.2.2.5 Owner (drop-down box)

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

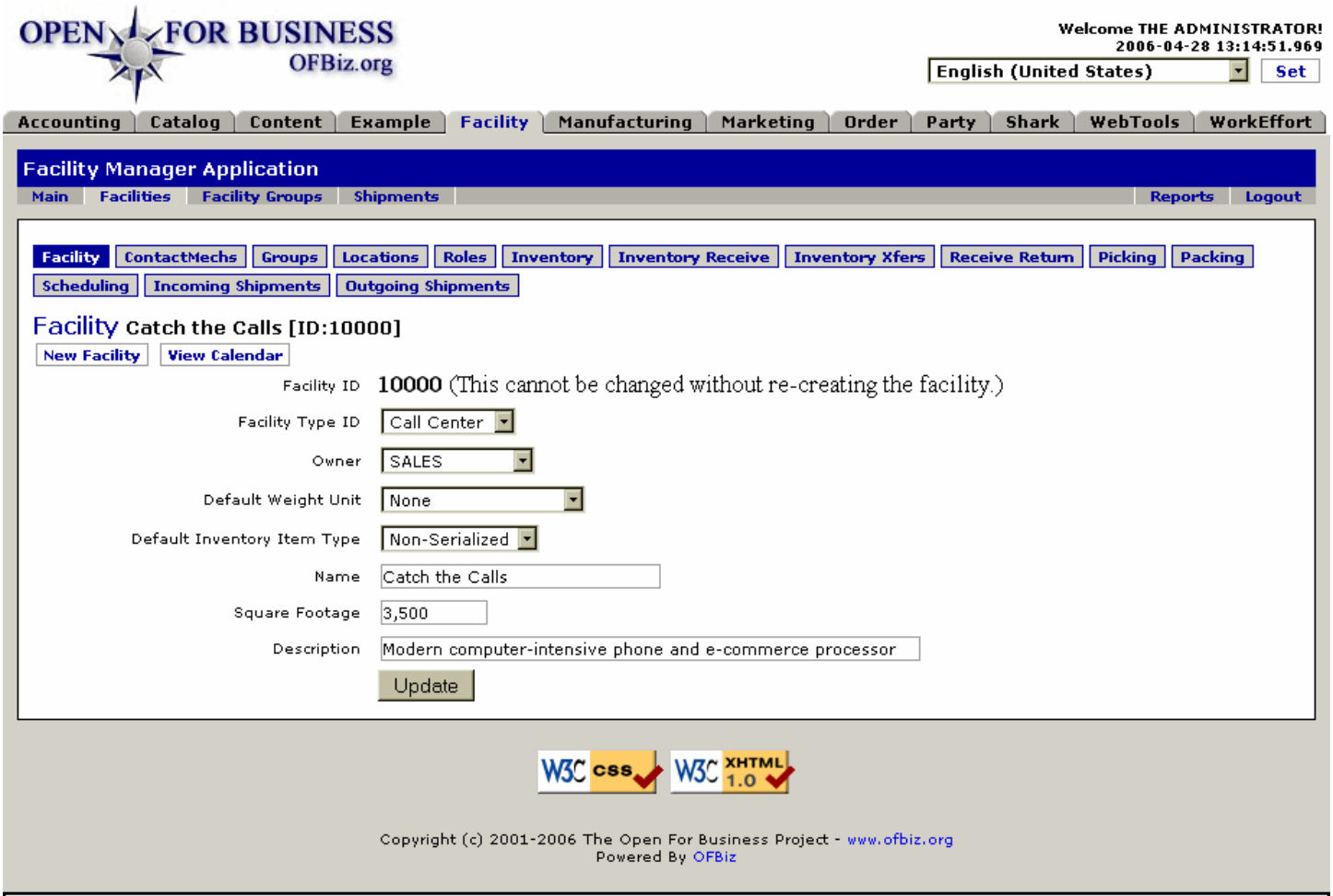
What is the floor area of the facility?

.2.2.10 Description

Explain the purpose, function or role of this Facility.

.2.3 Facility tab

.2.3.1 EditFacility



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:
<B> ---
 Building
 Floor
 Office
 Call Center
 Plant
 Room
 Retail Store
 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>

 MARKETING
 ACCOUNTING
 SALES
 DEV
 TESTING
 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

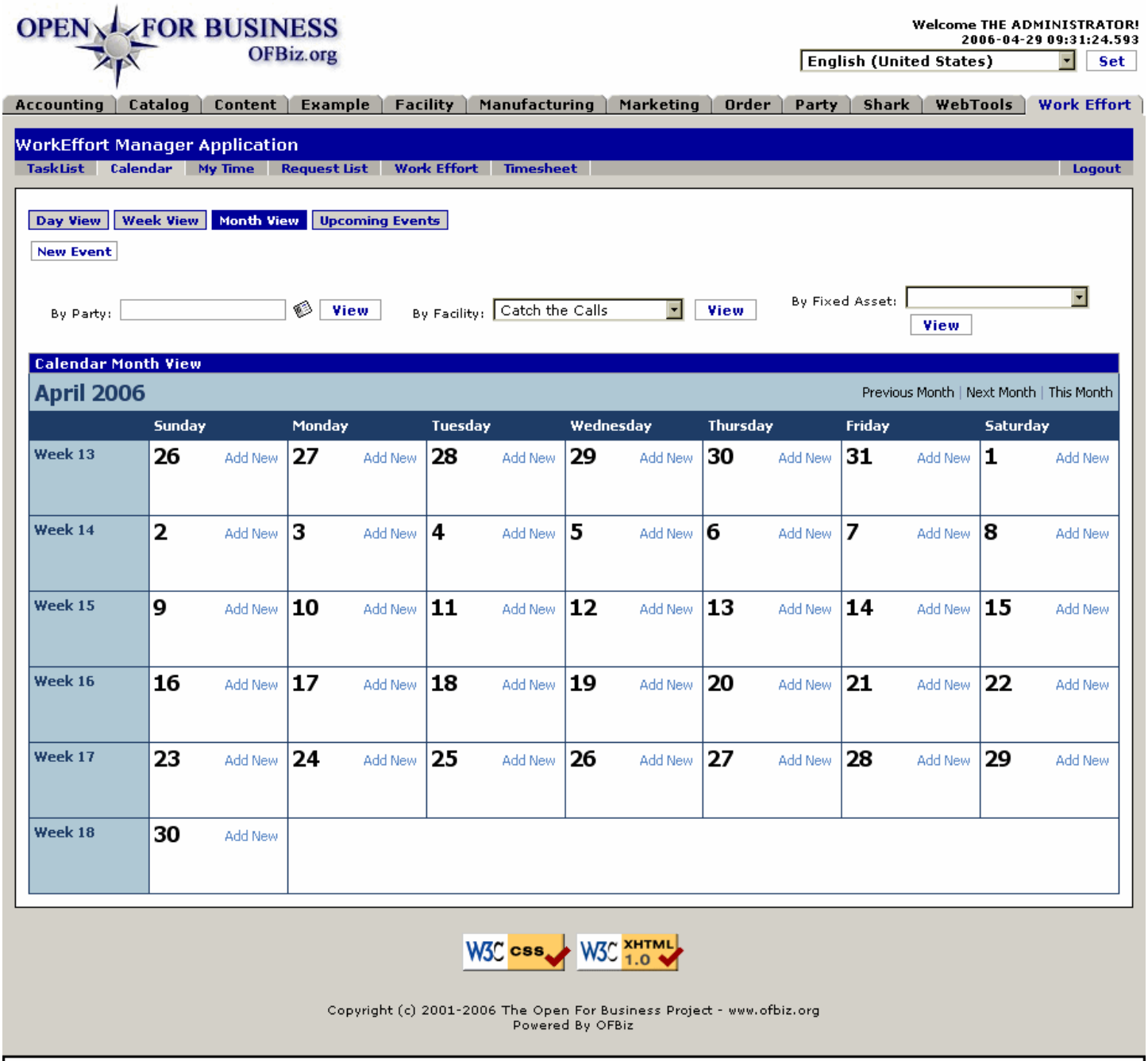
Explain the purpose, function or role of this Facility.

.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



[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

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
 Postal Address
 Phone Number
 Email Address
 Internet IP Address
 Internet Domain Name
 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

Tool for creating a new Electronic Address contact mechanism.

.2.4.1.4.2 link buttons

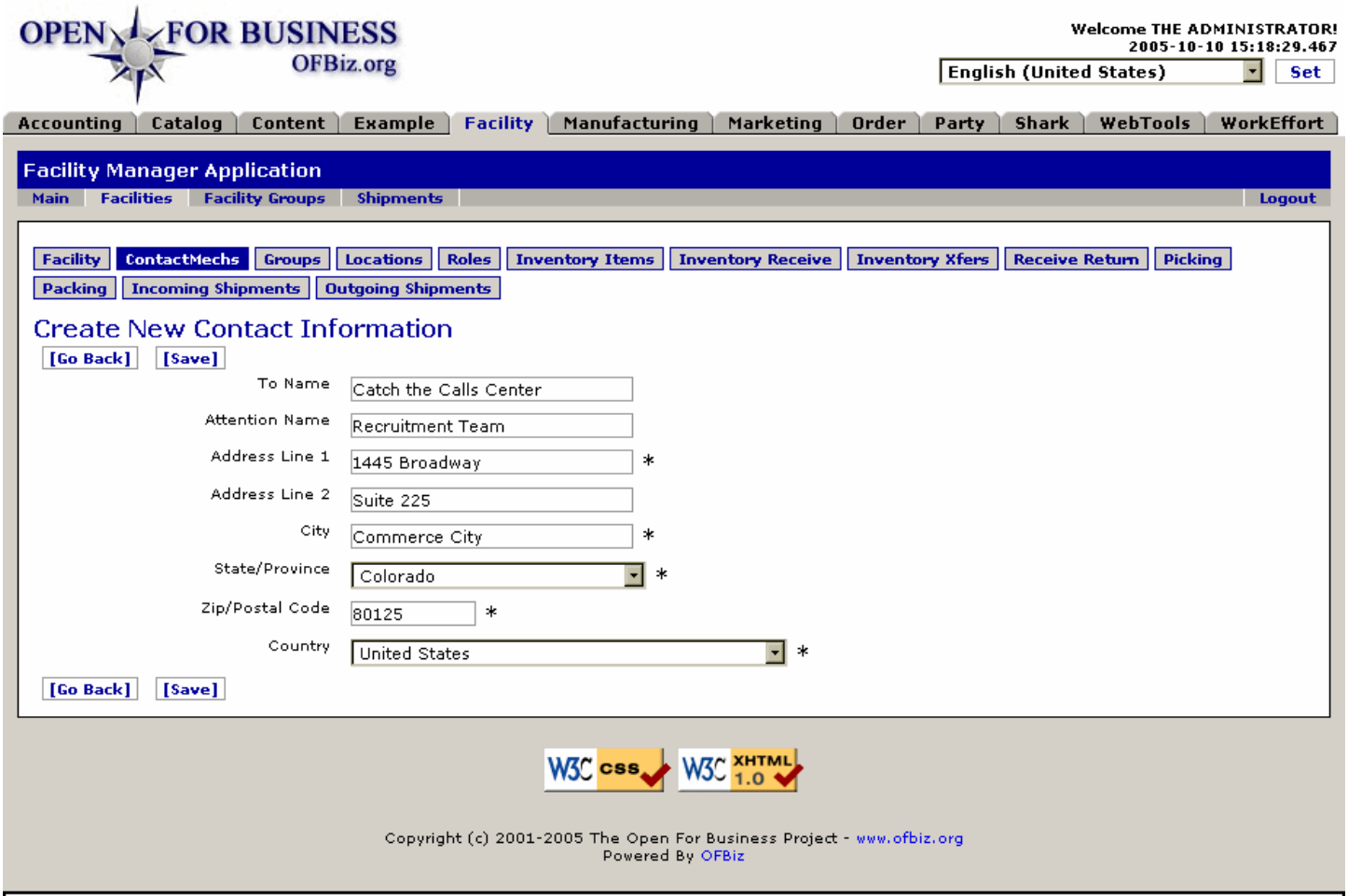
[Go Back] [Save] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]</B>

.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 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) *

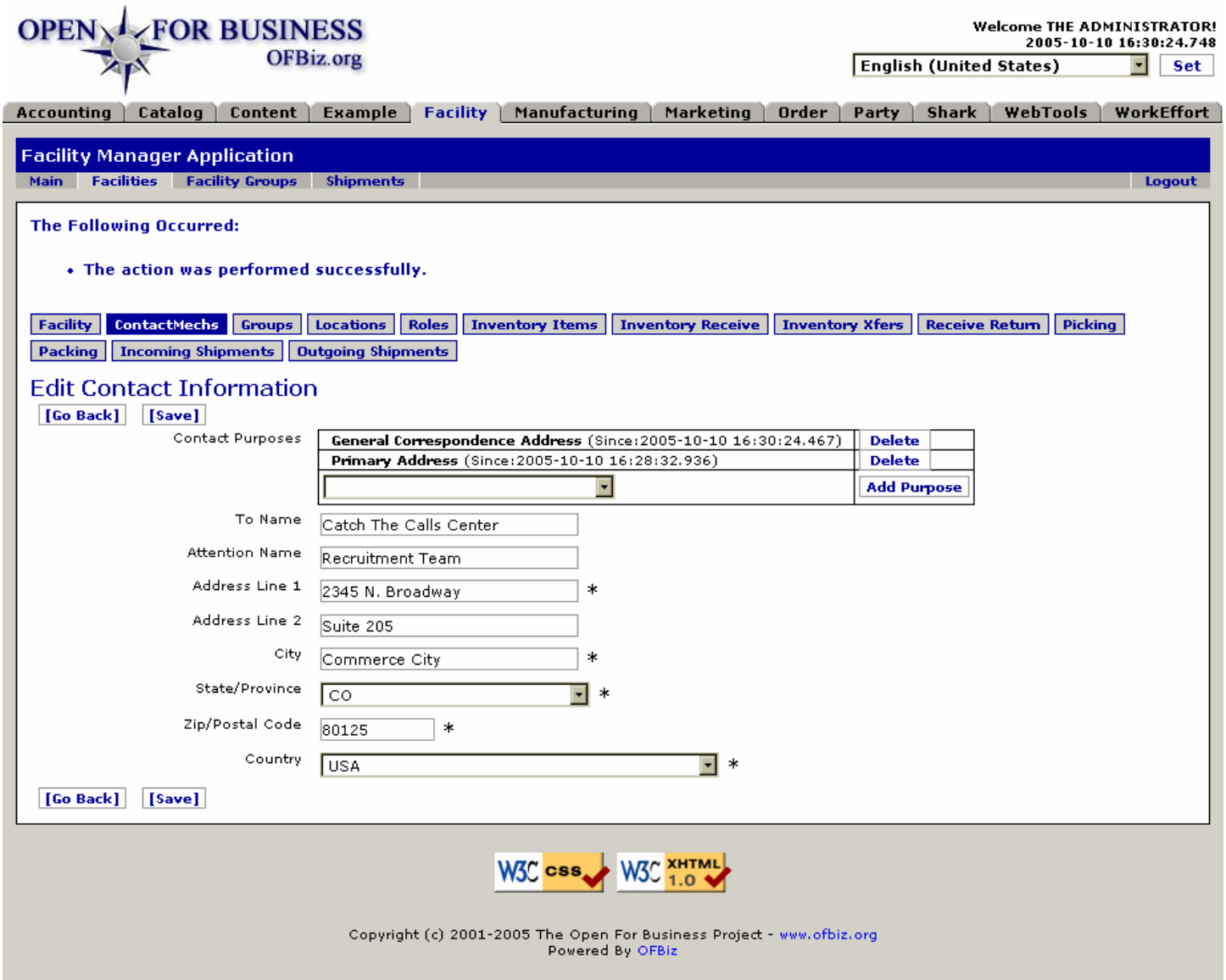
Select the country from the drop-down box.

.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:



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
 General Correspondence Address
 Payment (AR) Address
 Purchase Return Address
 Shipping Destination Address
 Shipping Origin Address</B>

.2.4.1.6 Phone Number

.2.4.1.6.1 EditContactMech-newPhonNum

id:[DOCFAC2145] image:

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>

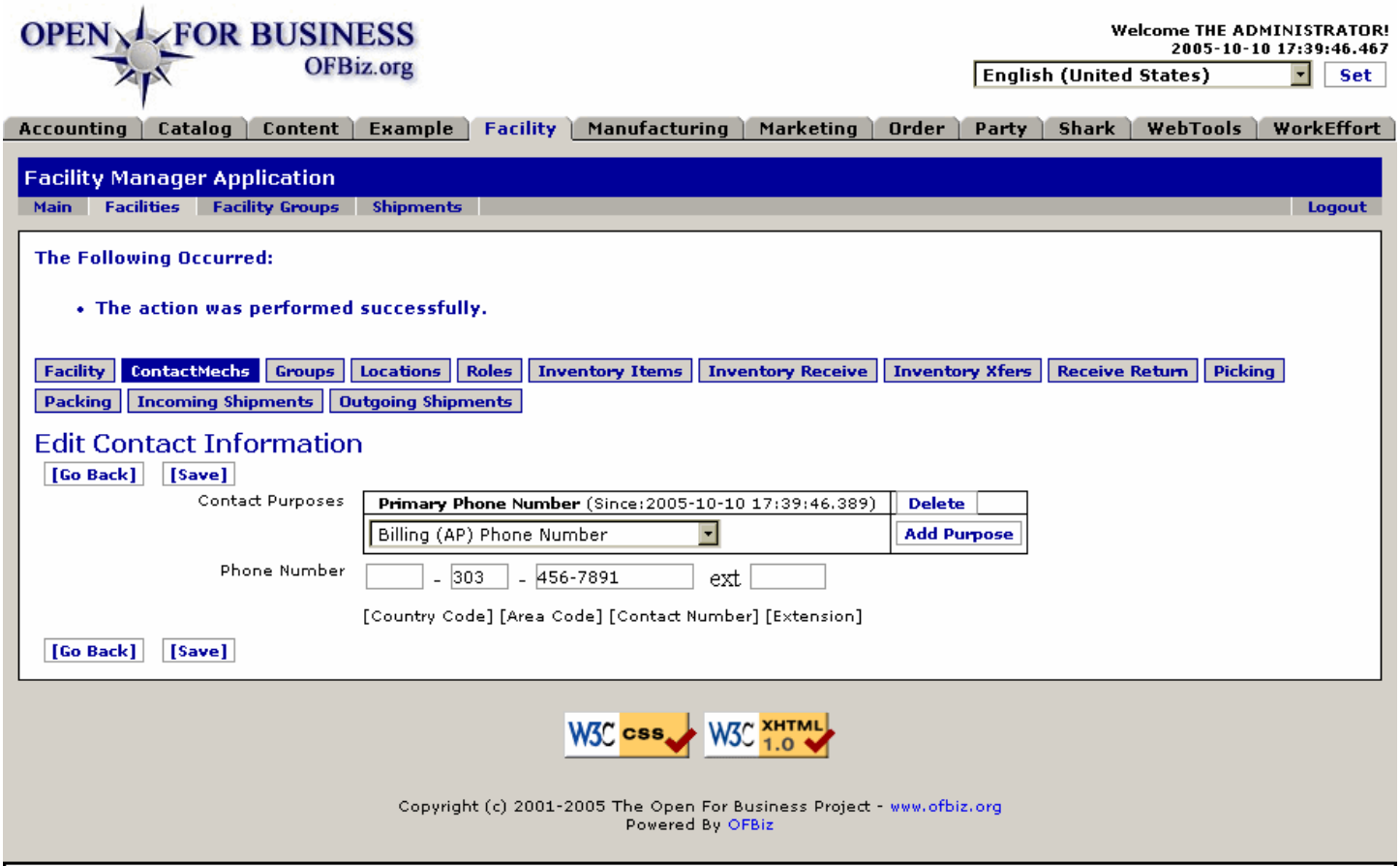
.2.4.1.6.3 Phone Number *

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



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
 Secondary Fax Number
 Billing (AP) Phone Number
 Main Home Phone Number
 Main Mobile Phone Number
 Payment (AR) Phone Number
 Shipping Destination Phone Number
 Shipping Origin Phone Numbe r
 Main Work Phone Number
 Secondary Work Phone Number
 Primary Phone Number</B>

.2.4.1.7 Email Address

.2.4.1.7.1 EditContactMech-newEmail

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>

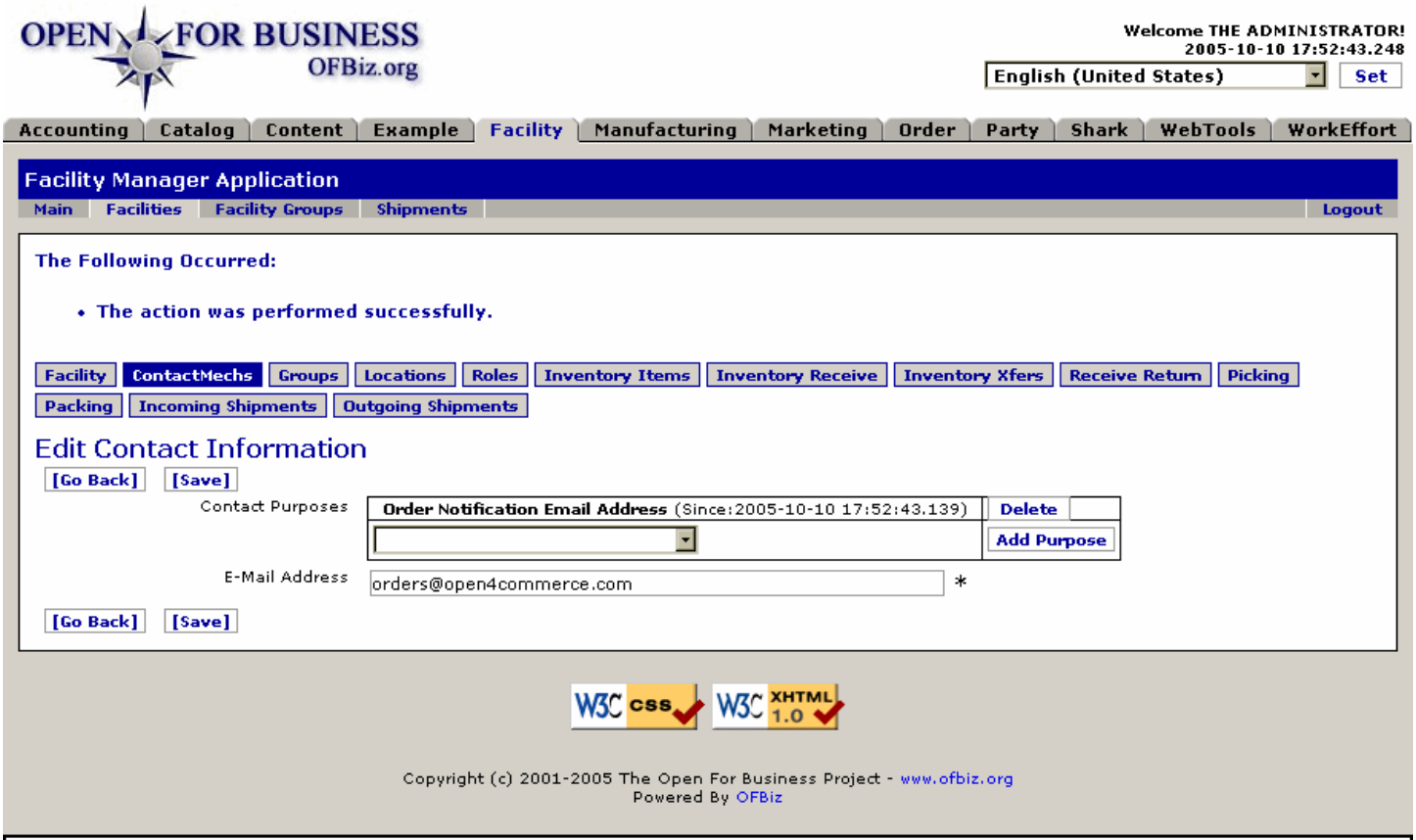
.2.4.1.7.3 E-Mail Address *

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



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
 Other Email Address
 Primary Email Address </B>

.2.4.1.8 Internet IP Address

.2.4.1.8.1 EditContactMech-newInternetIPAdd

Create a new Internet IP Address contact record here.

.2.4.1.8.2 link buttons

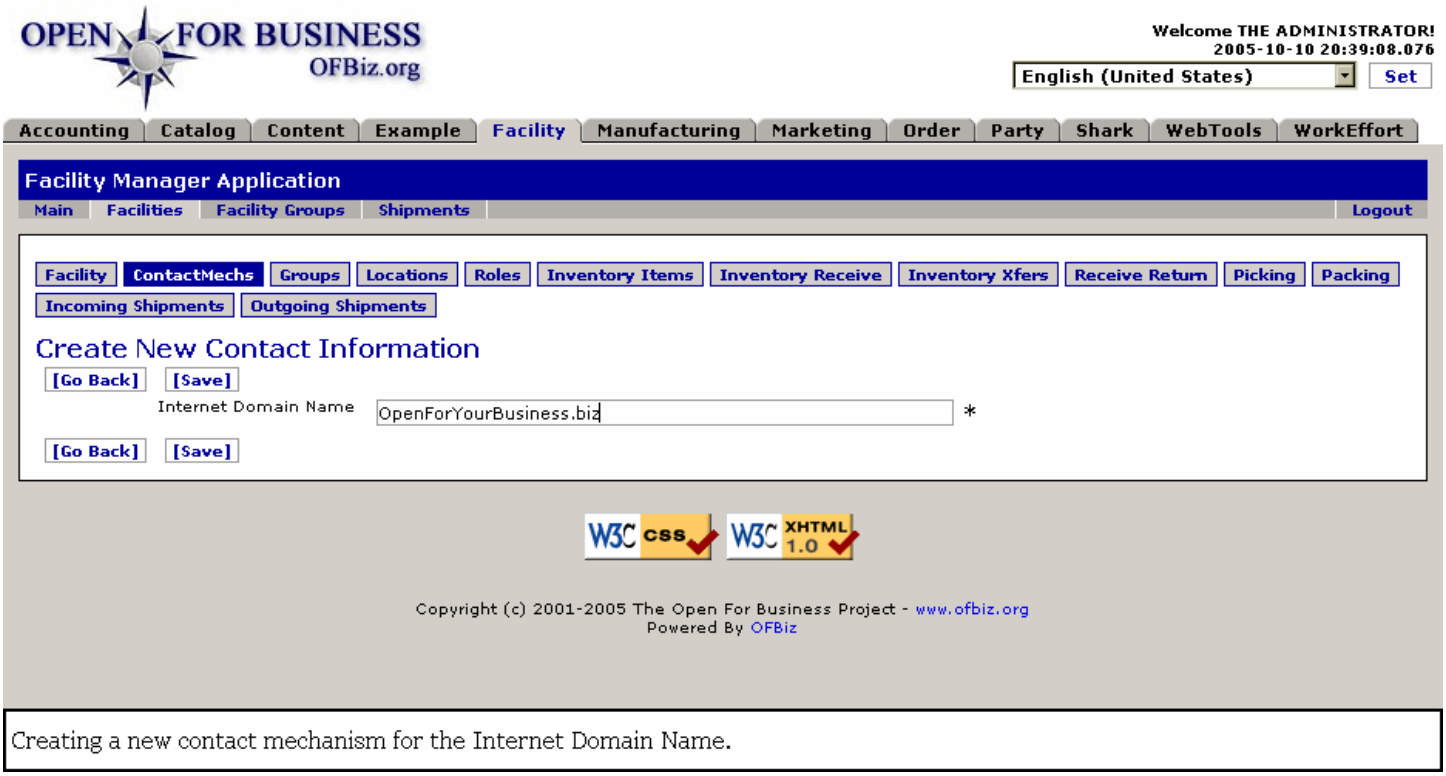
[Go Back] [Save] <B> [Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory Items] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Incoming Shipments] [Outgoing Shipments]</B>

.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



Creating a new contact mechanism for the Internet Domain Name.

.2.4.1.9.2 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>

.2.4.1.9.3 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

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>

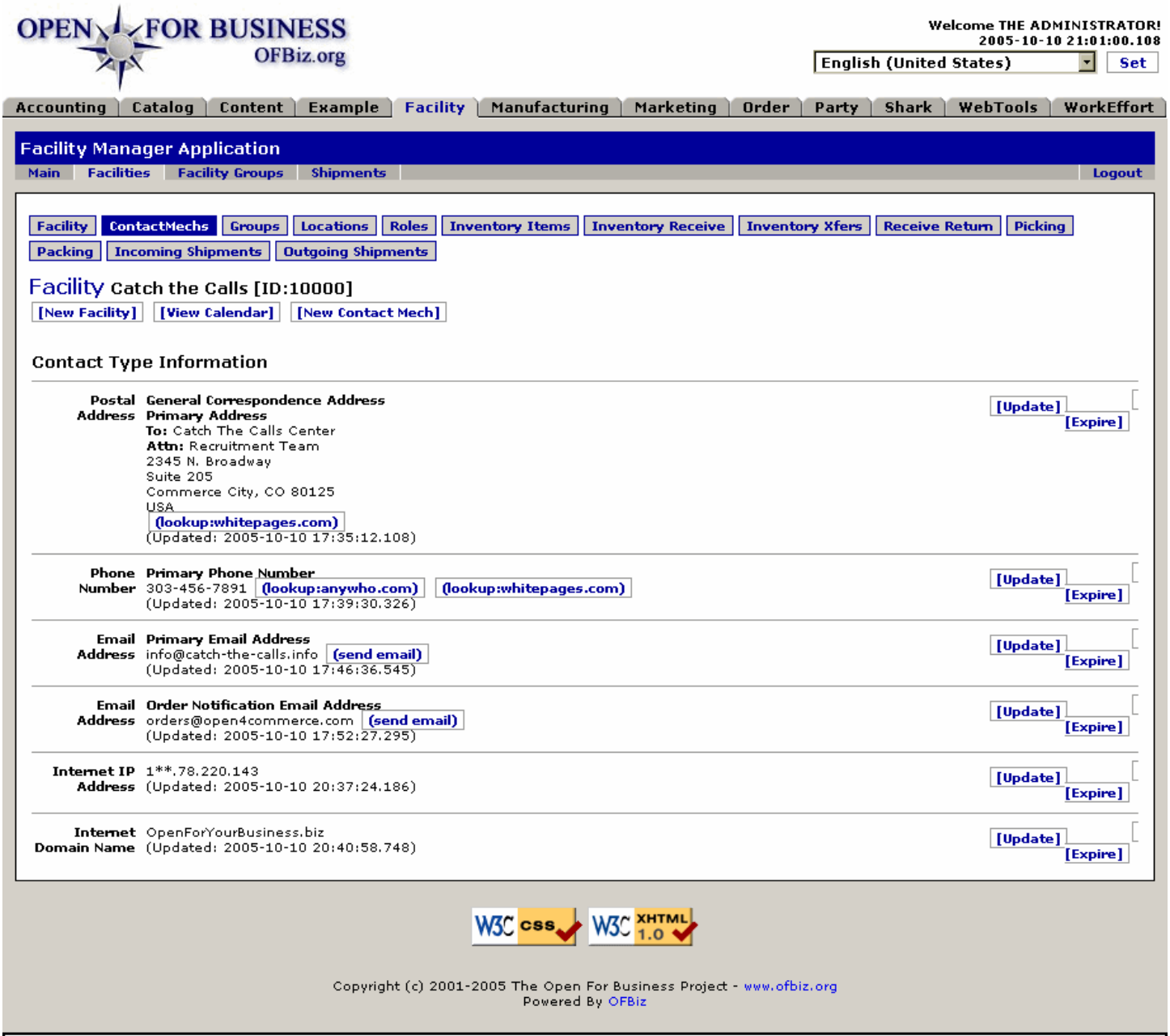
.2.4.1.10.3 Web URL/Address *

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



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:

Before any Facility Group has been created, click on the [Add] button to start the creation process.

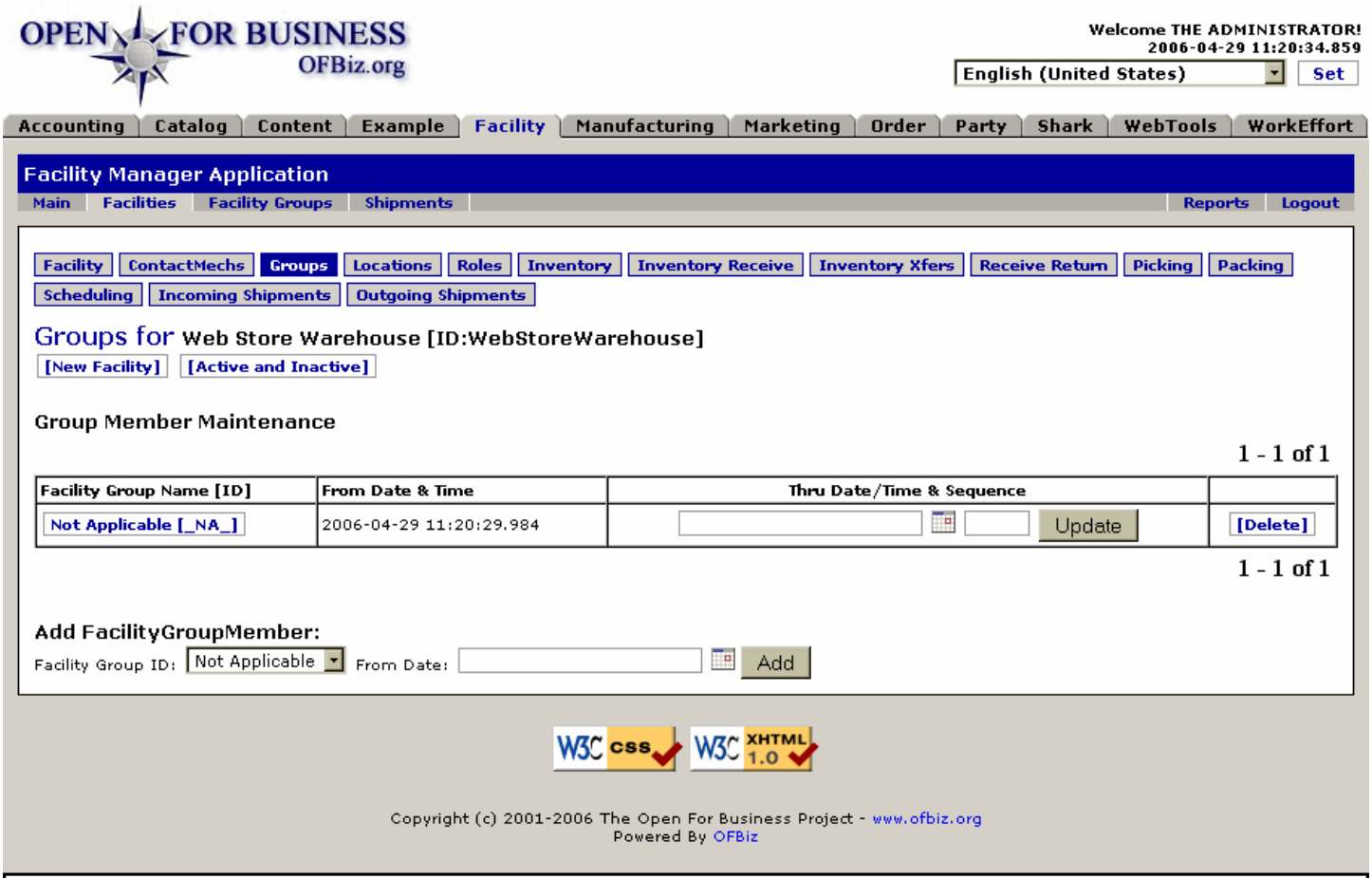
.2.5.1.2 link buttons

[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



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.

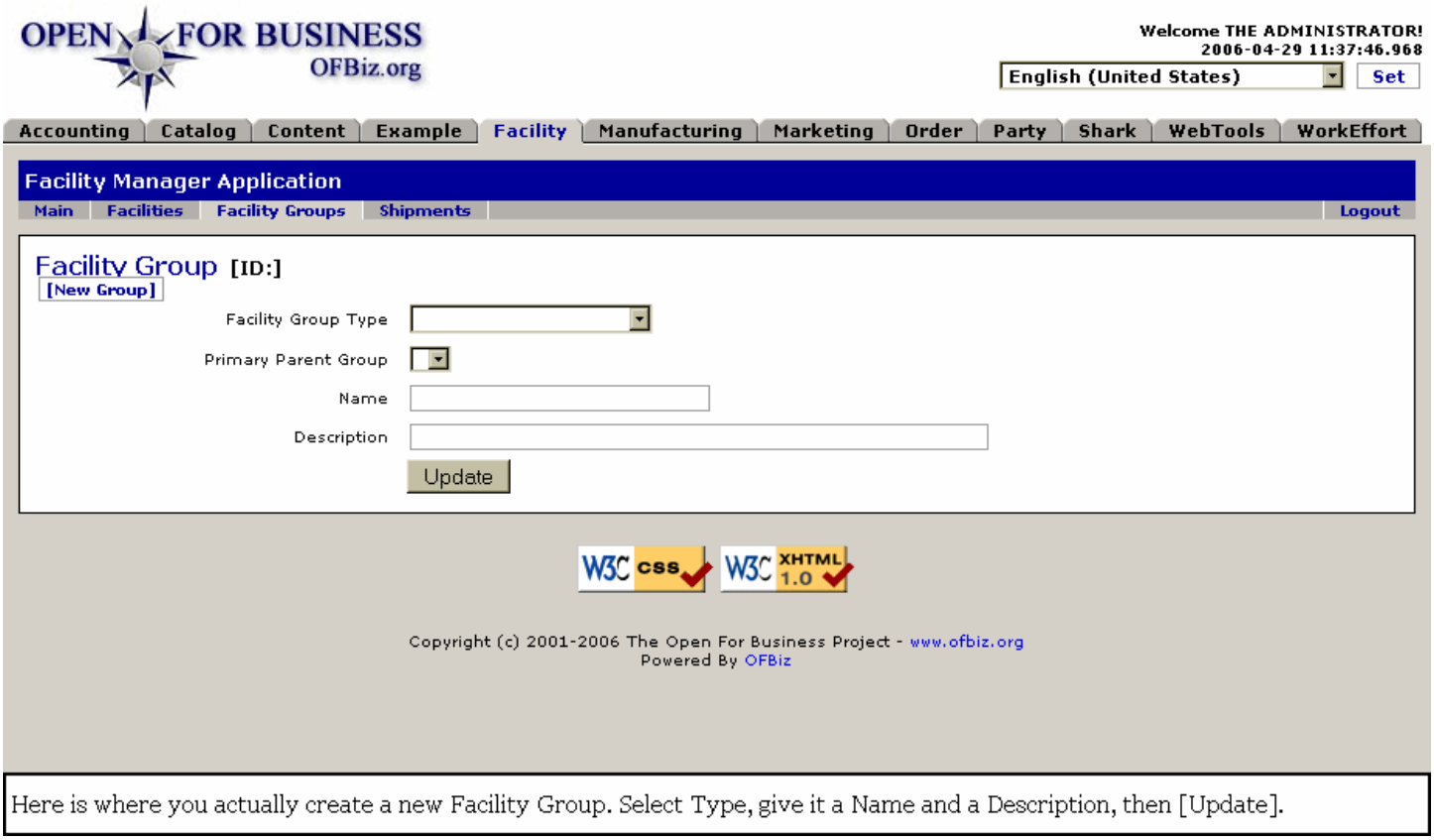
.2.5.1.6 createNewFG-Step3

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



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 <I> Groups </I> 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

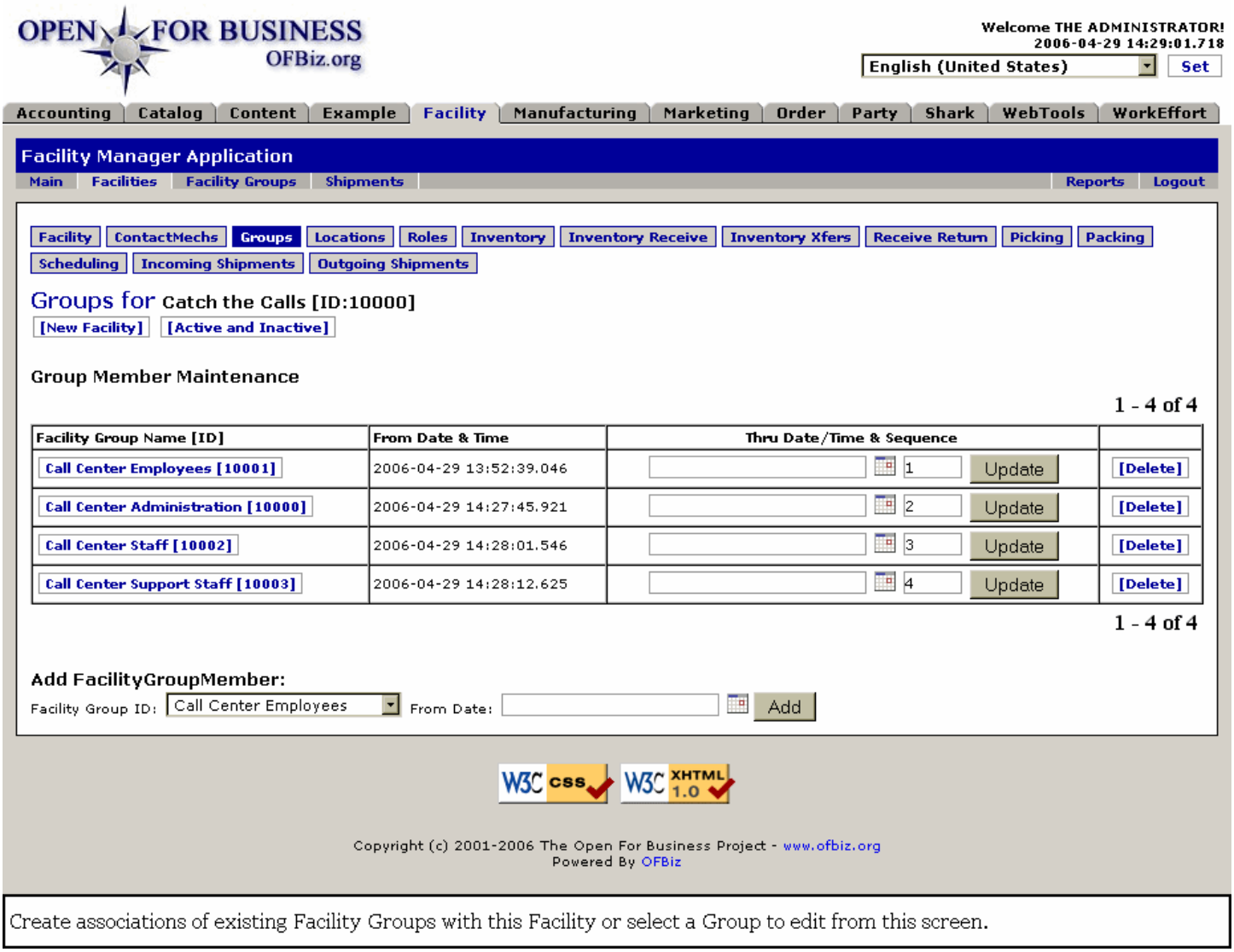
.2.5.2.1 Group Member Maintenance

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 <I> Groups </I> sub-tab.

.2.5.2.2 EditFacilityGroups

id:[10459] image:



Create associations of existing Facility Groups with this Facility or select a Group to edit from this screen.

.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:

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.

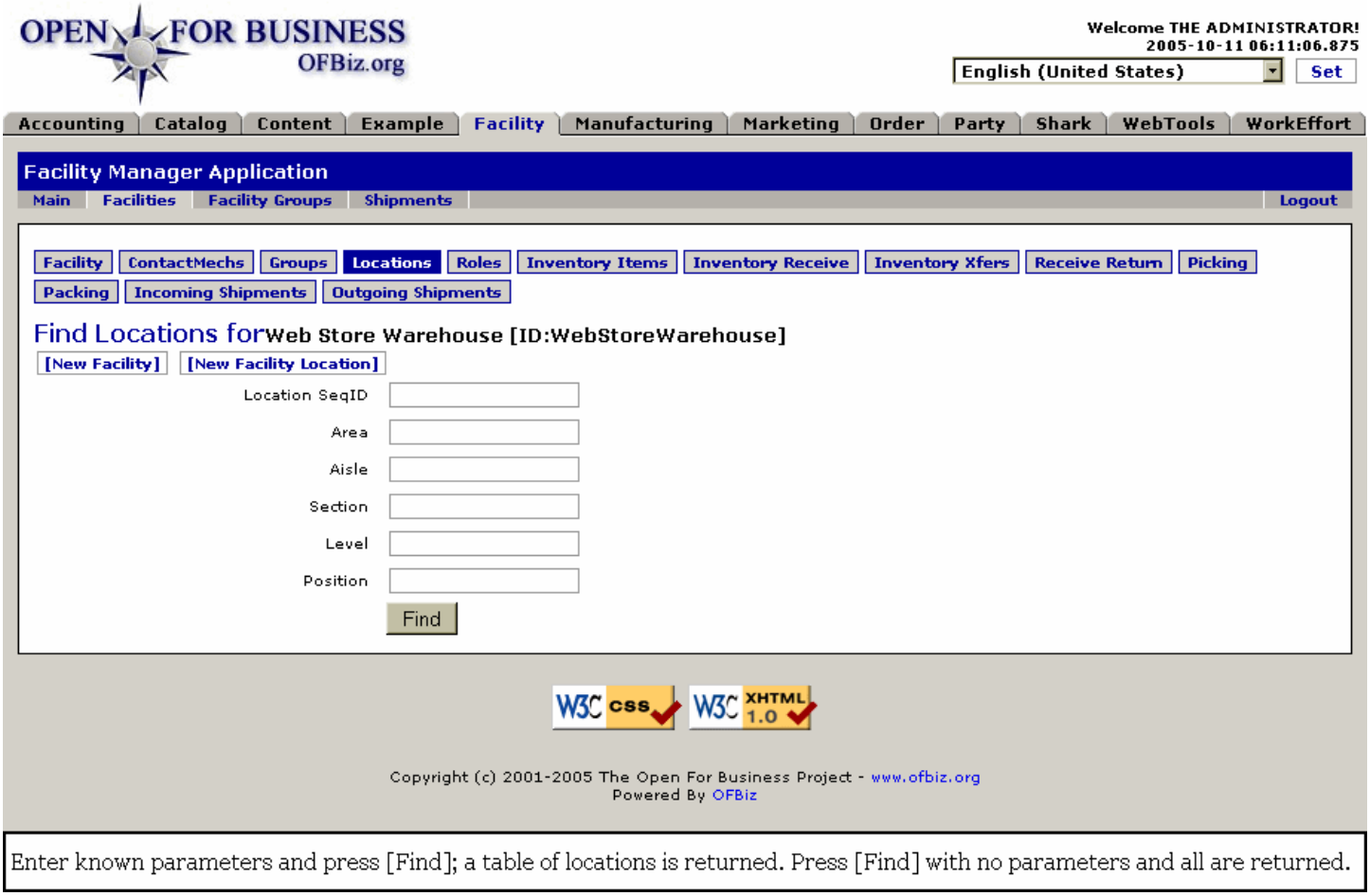
.2.6 Locations tab

.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:



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

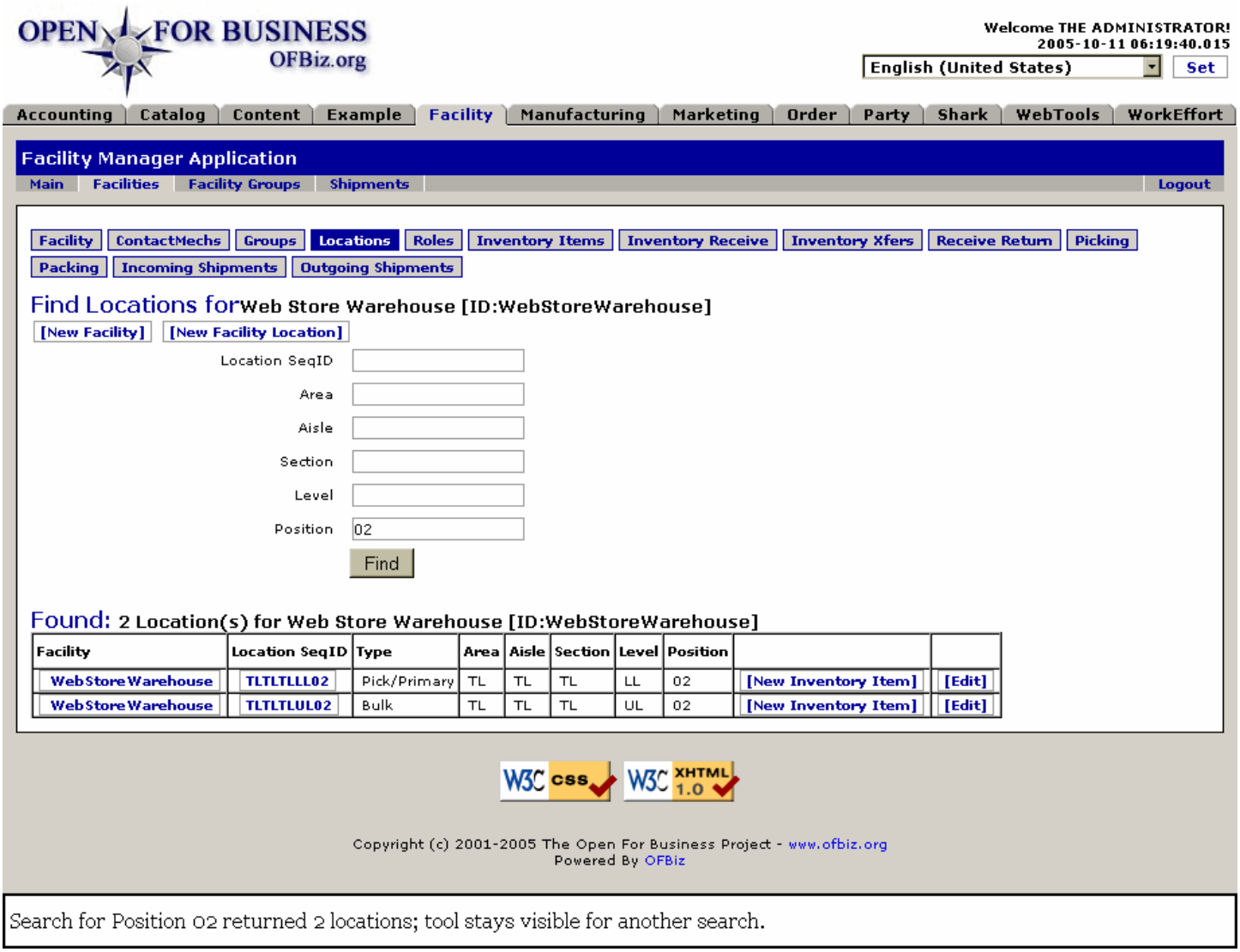
What Position on that Level of this Section is the item located?

.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:



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

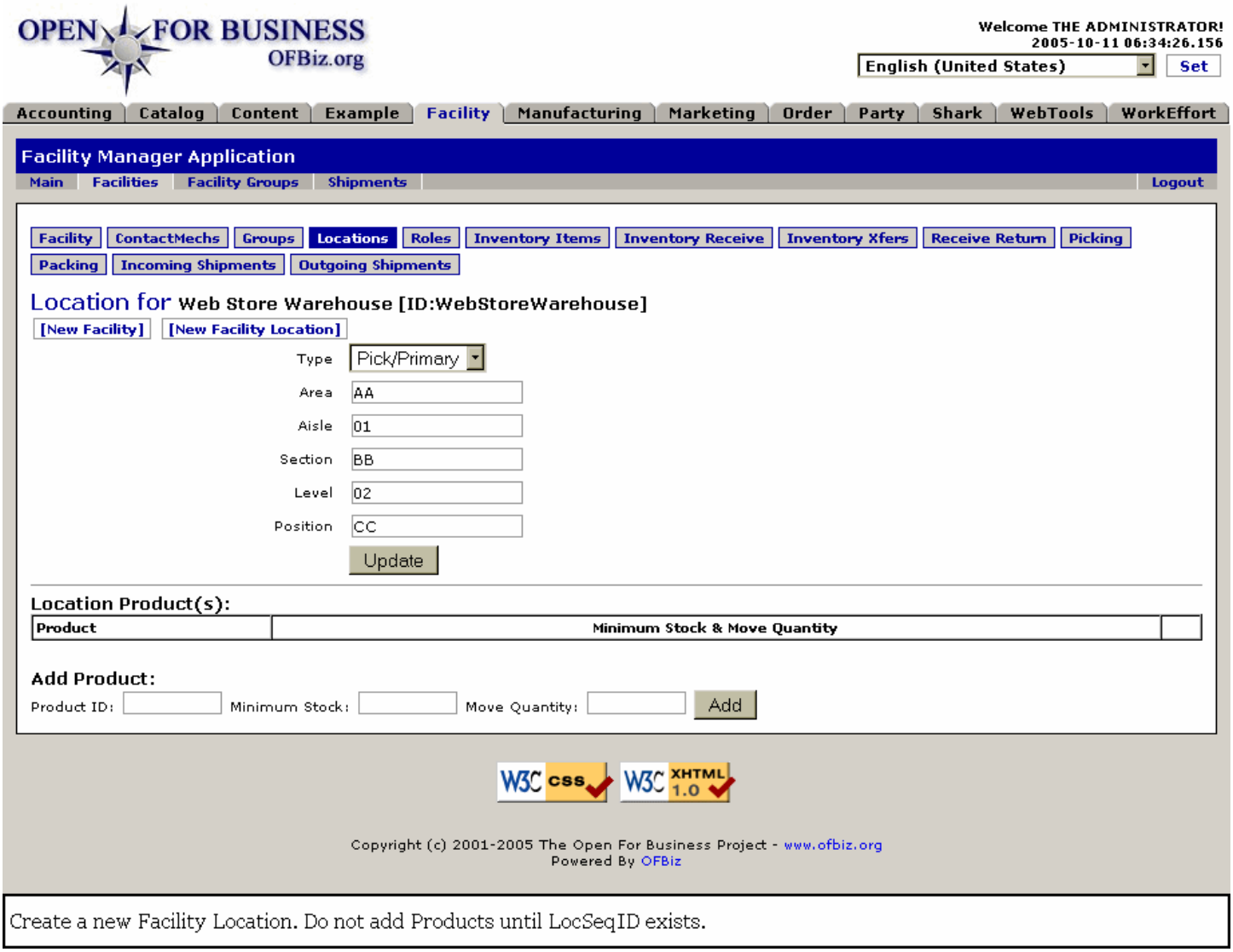
Which Level (of shelving) within that Section is the Position?

.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



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?

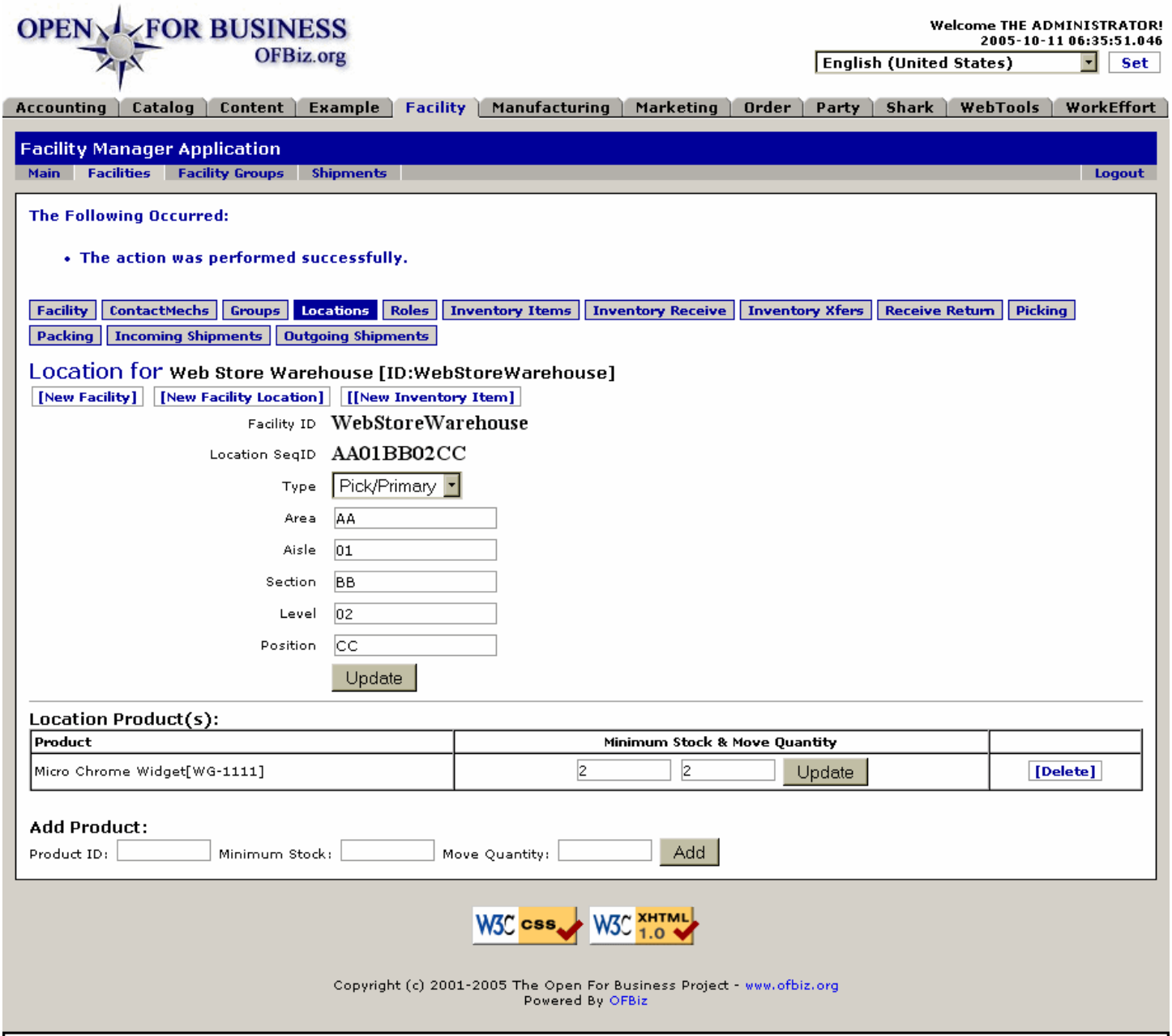
.2.6.2.4.3 Move Quantity

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



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?
 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 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.

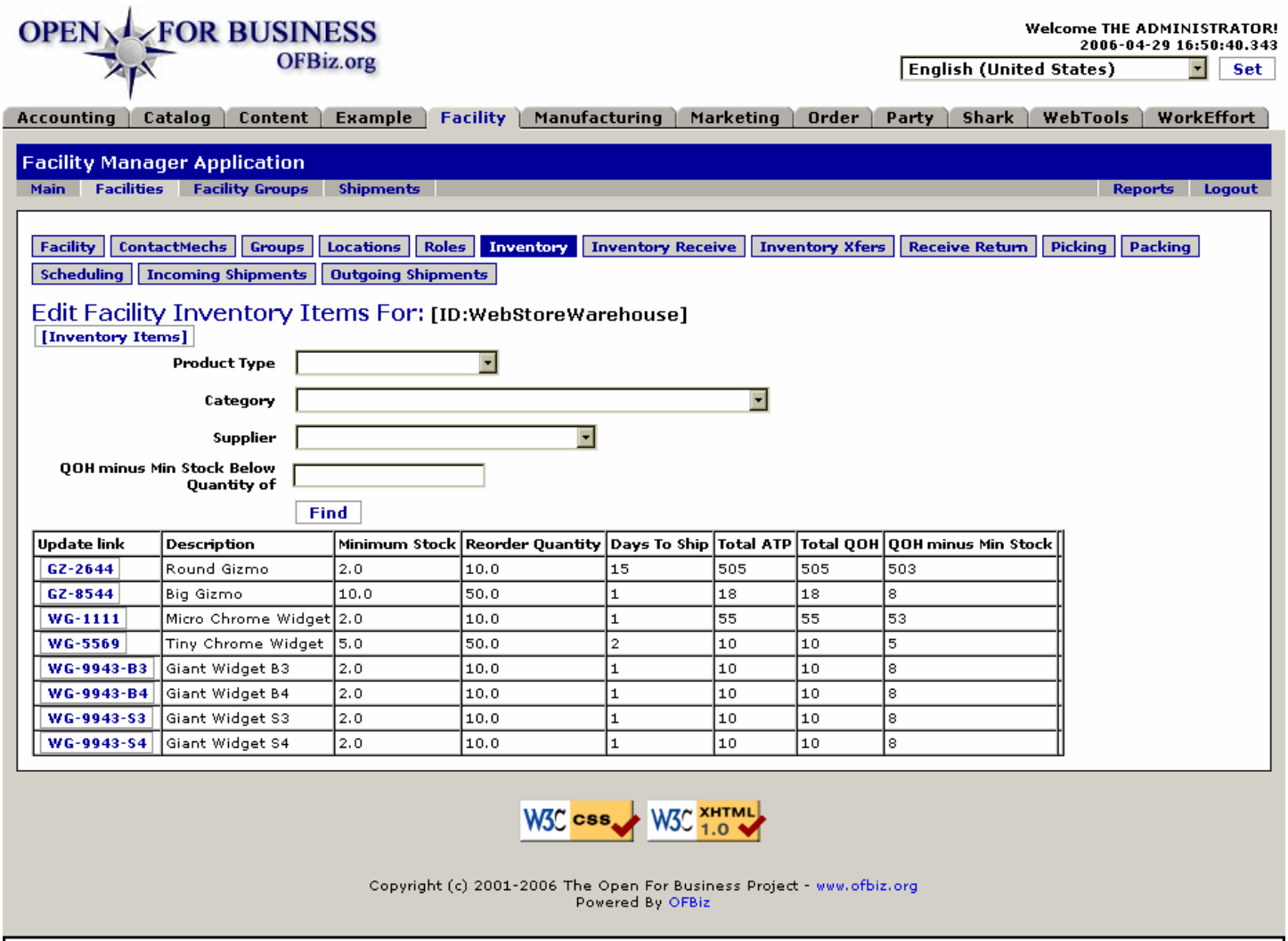
.2.7.4.2 Role Type (drop-down box)

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:



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.

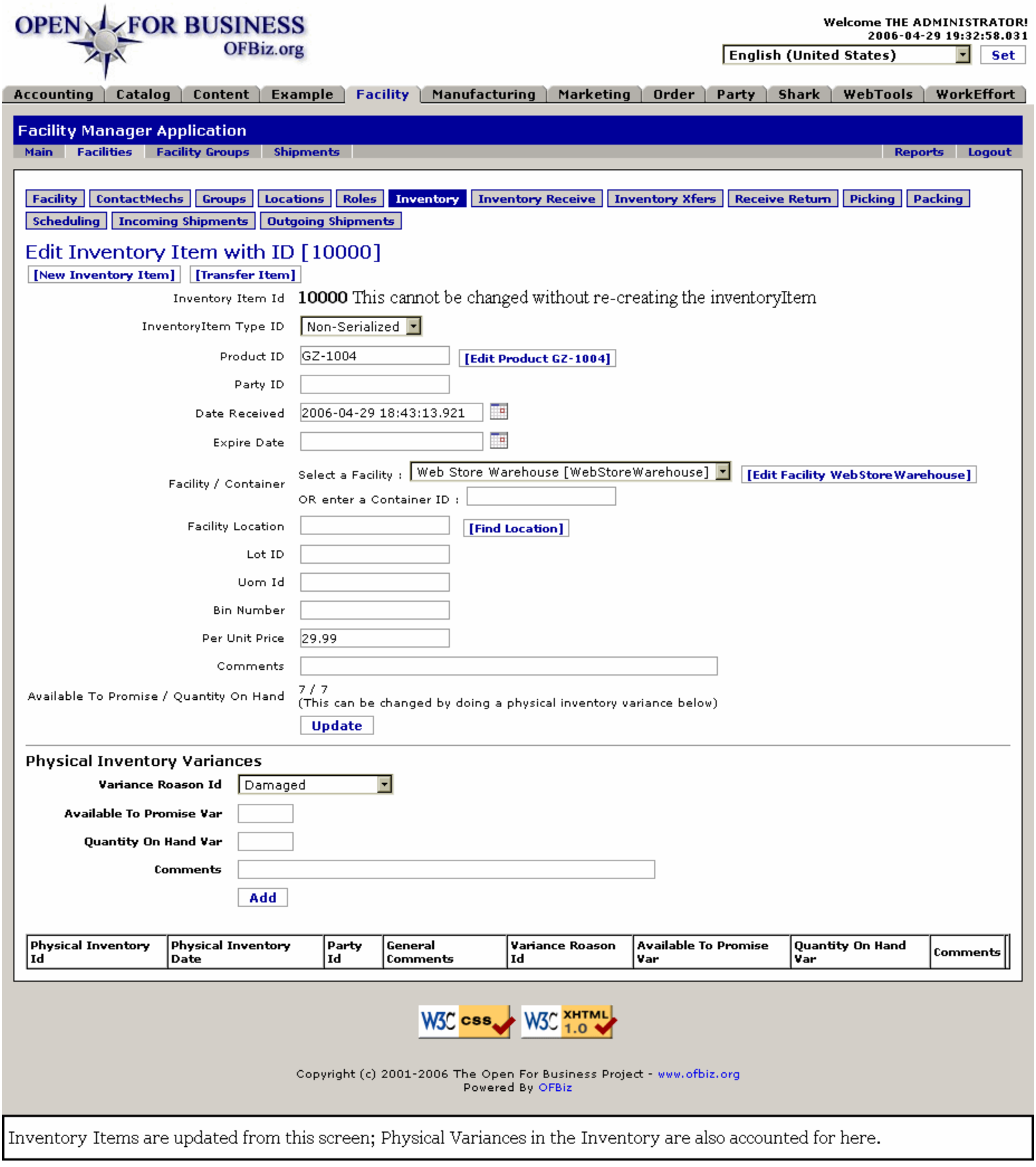
.2.8.4.8 QOH minus Min Stock

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



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

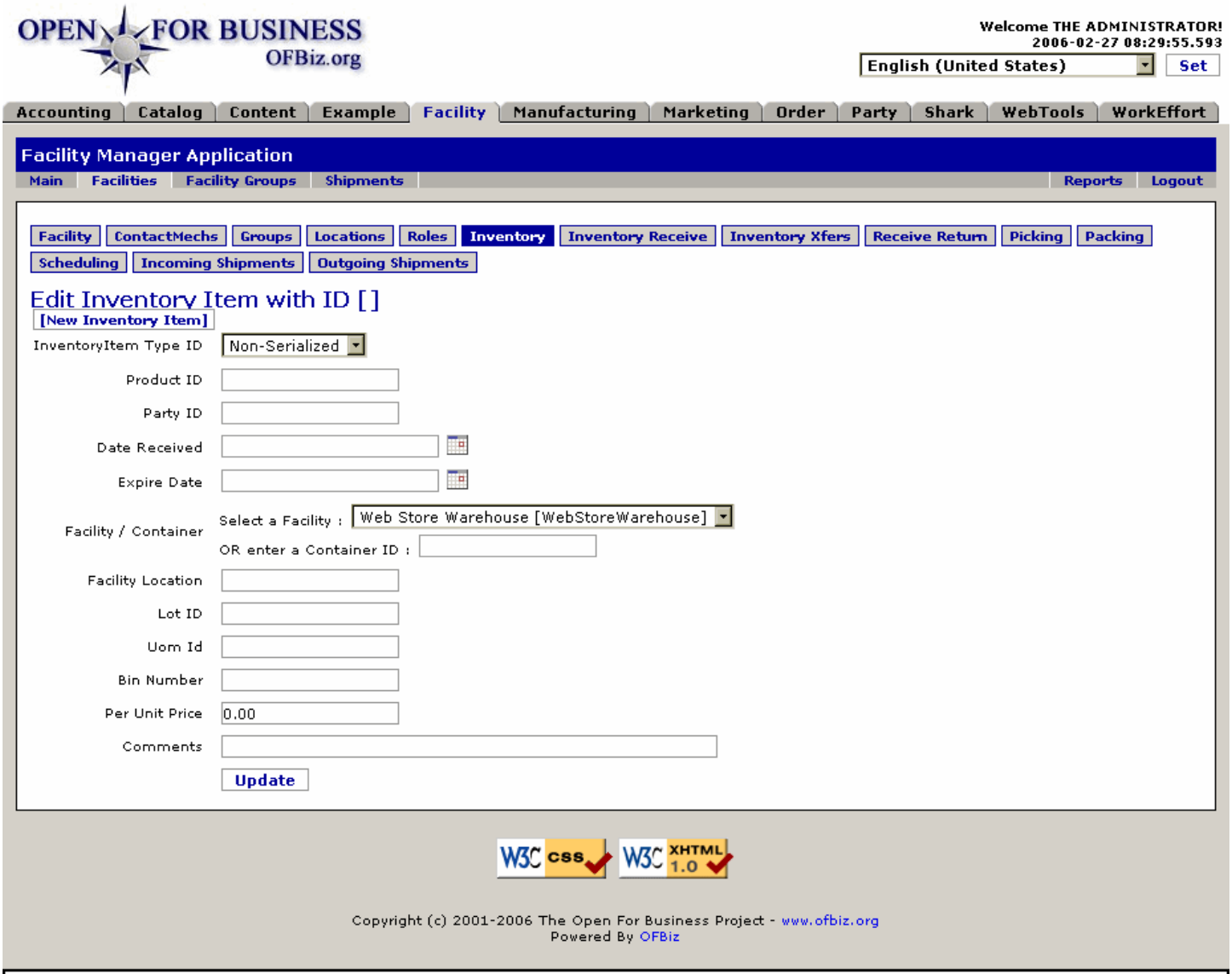
The variation on the number of units physically present. If a reduction in quantity, there will be a minus sign (-) in front of the number.

.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



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>

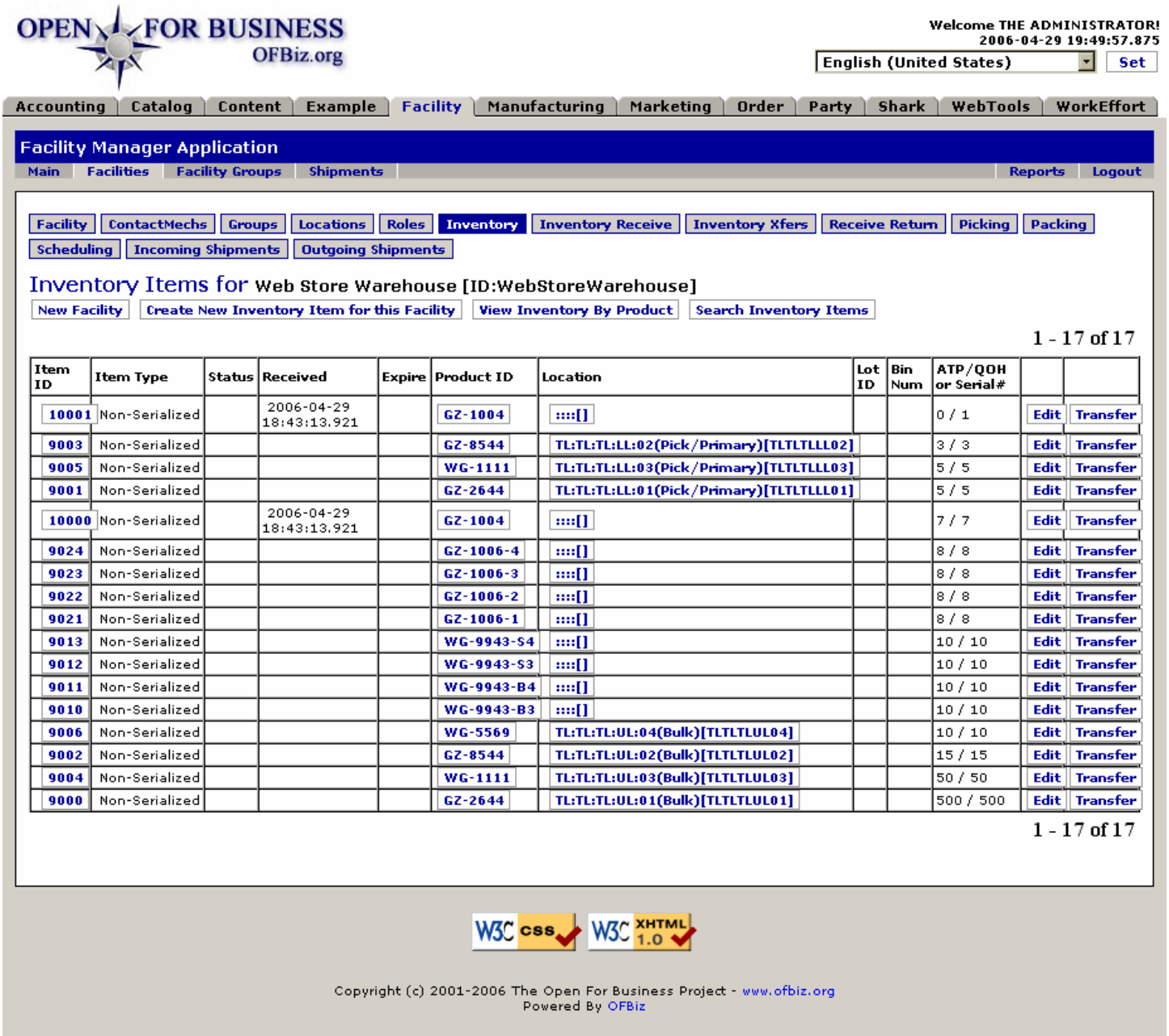
.2.8.6.3 Discussion

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



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].
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

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

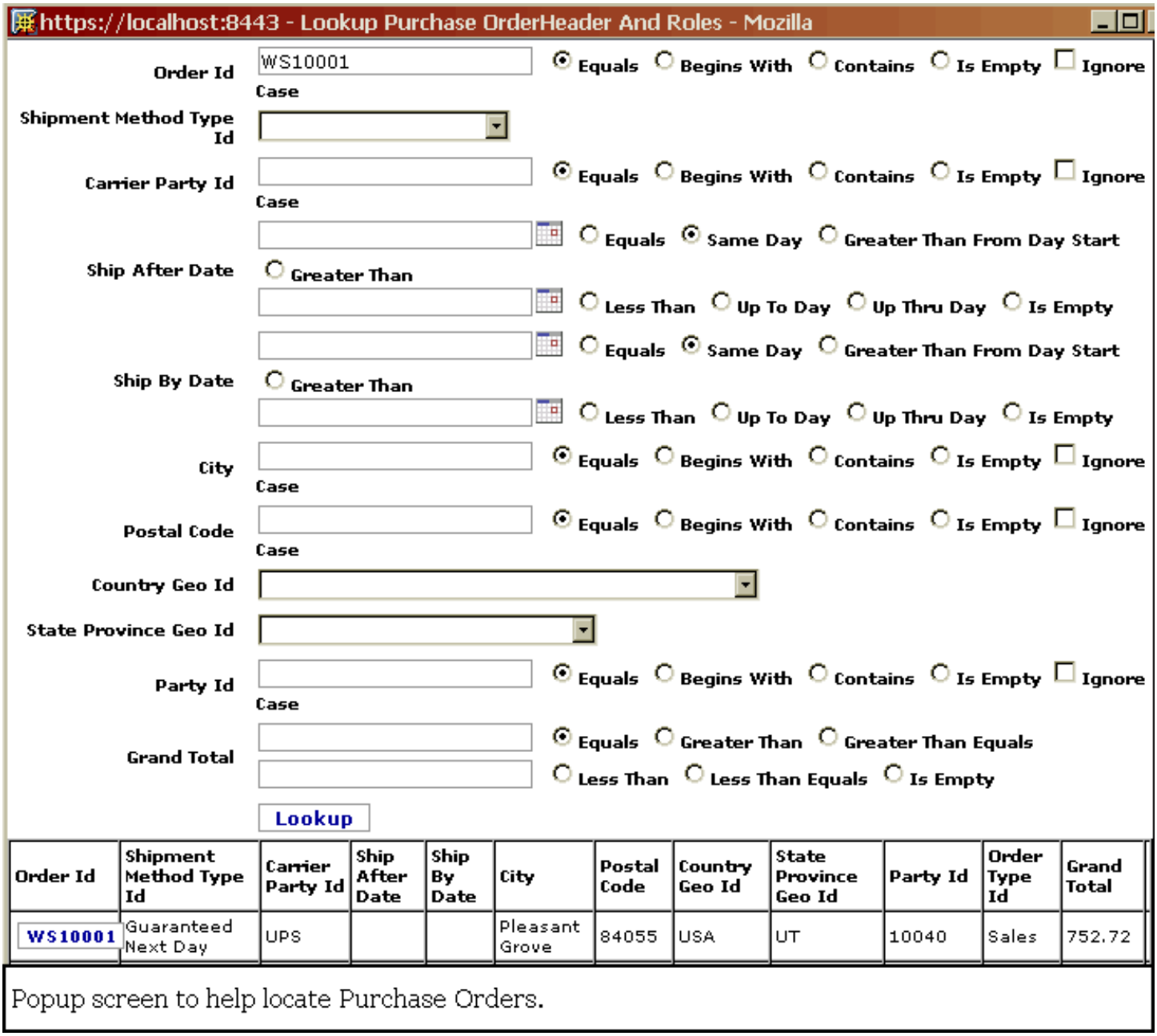
.2.9.1.2 link buttons

[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



Popup screen to help locate Purchase Orders.

.2.9.1.4 Product ID (popup search box)

.2.9.1.4.1 LookupIDpopup

Product ID [ ] Case ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore

Brand Name [ ] Case ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore

Internal Name [ ] Case ◉ Equals ○ Begins With ○ Contains ○ Is Empty ☐ Ignore

Product Type [Finished Good]

Primary Category [ ]

Lookup

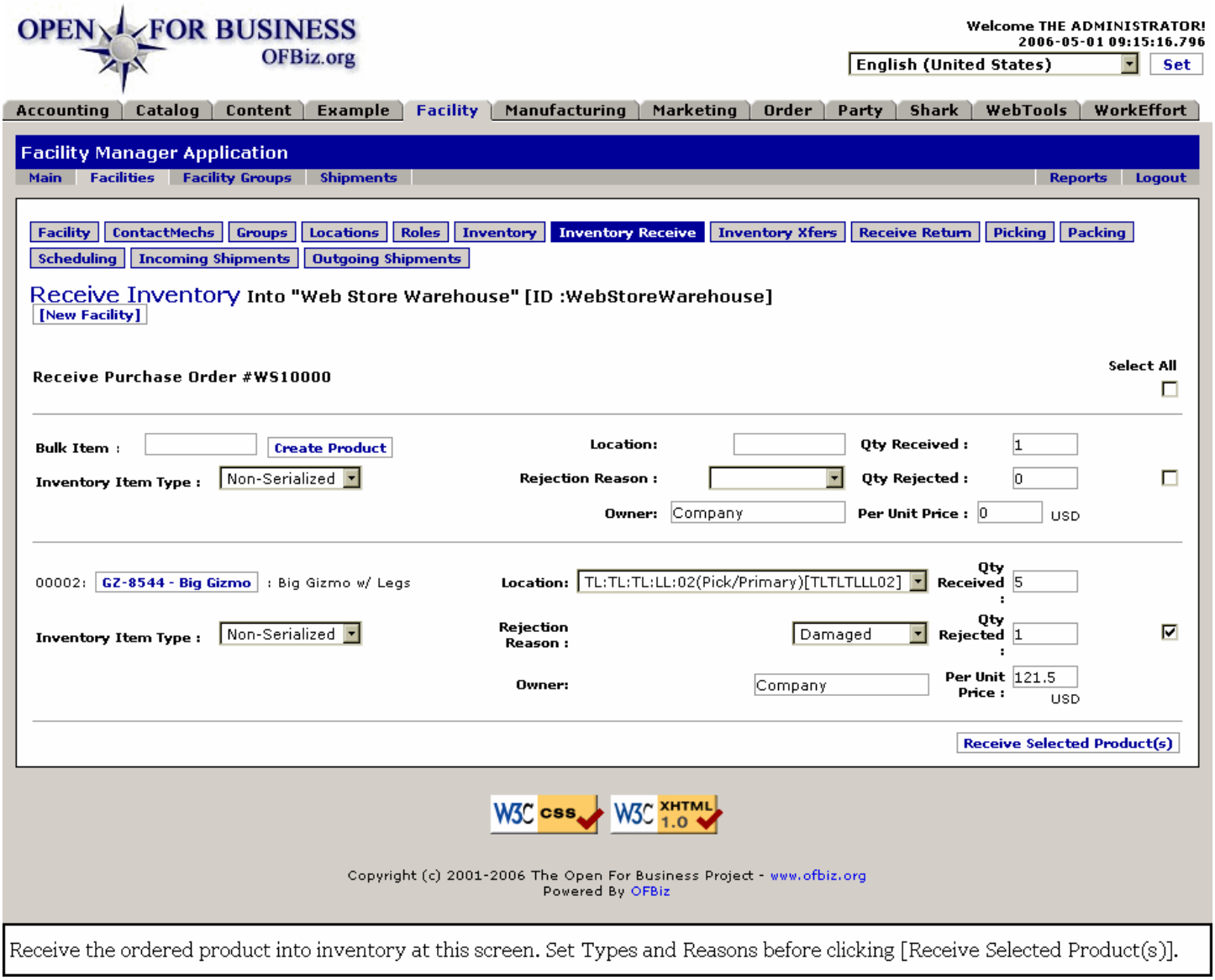
Product ID	Brand Name	Internal Name	Product Type	
GZ-1000		Tiny Gizmo	FINISHED_GOOD	
GZ-1001		Nan Gizmo	FINISHED_GOOD	
GZ-1004		Rainbow Gizmo	FINISHED_GOOD	
GZ-1005		.NIT Gizmo	FINISHED_GOOD	
GZ-1006		Open Gizmo	FINISHED_GOOD	Variants
GZ-2002		Square Gizmo	FINISHED_GOOD	
GZ-2644		Round Gizmo	FINISHED_GOOD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



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>
 Damaged
 Not Ordered
 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

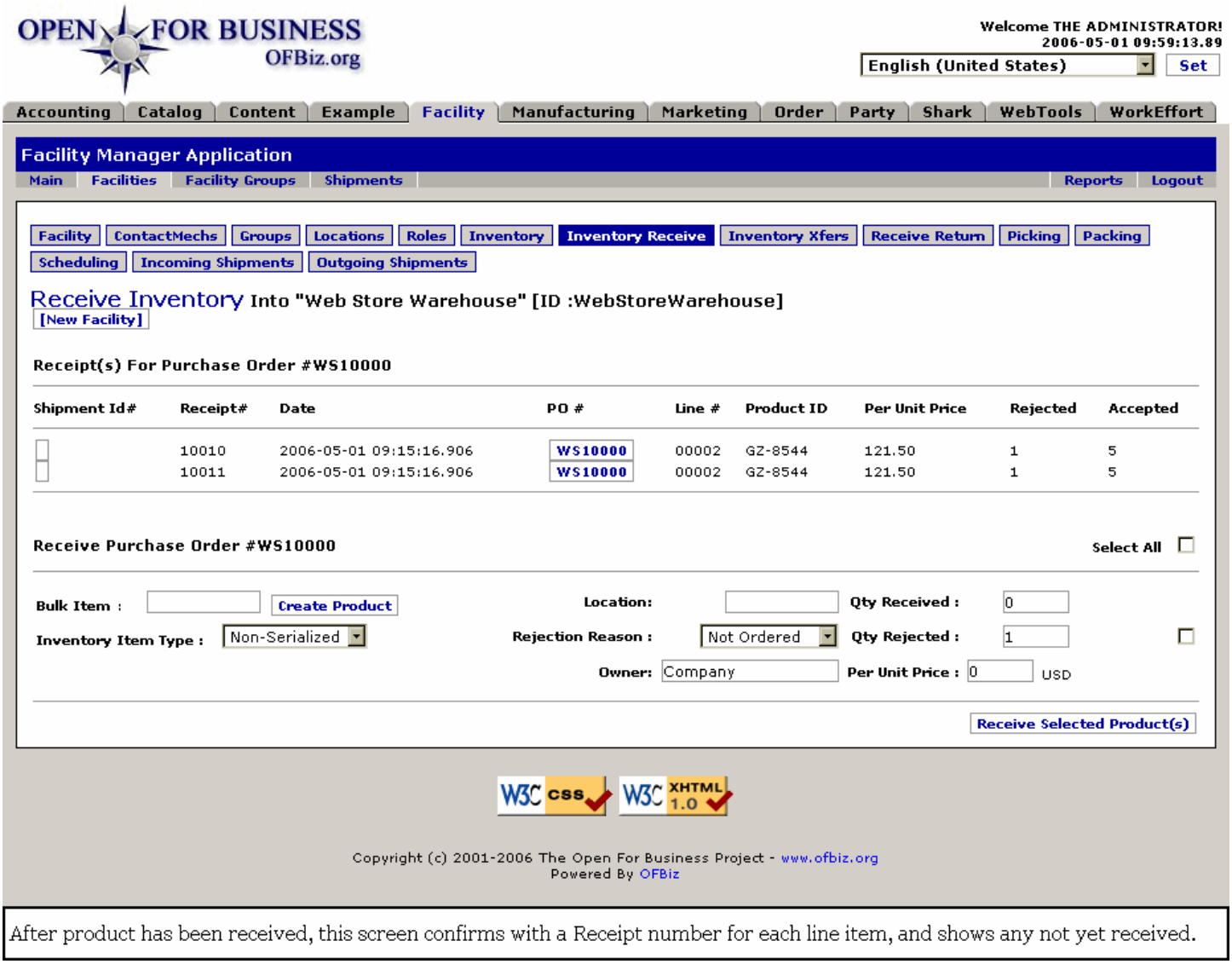
This would generally be the Company or the Department within the company which placed the original order. Matches what was selected in the first screen under the Order Manager > Order Entry screen.

.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



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#
 Receipt #
 Date
 PO #
 Line #
 Product ID
 Rejected
 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:

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.

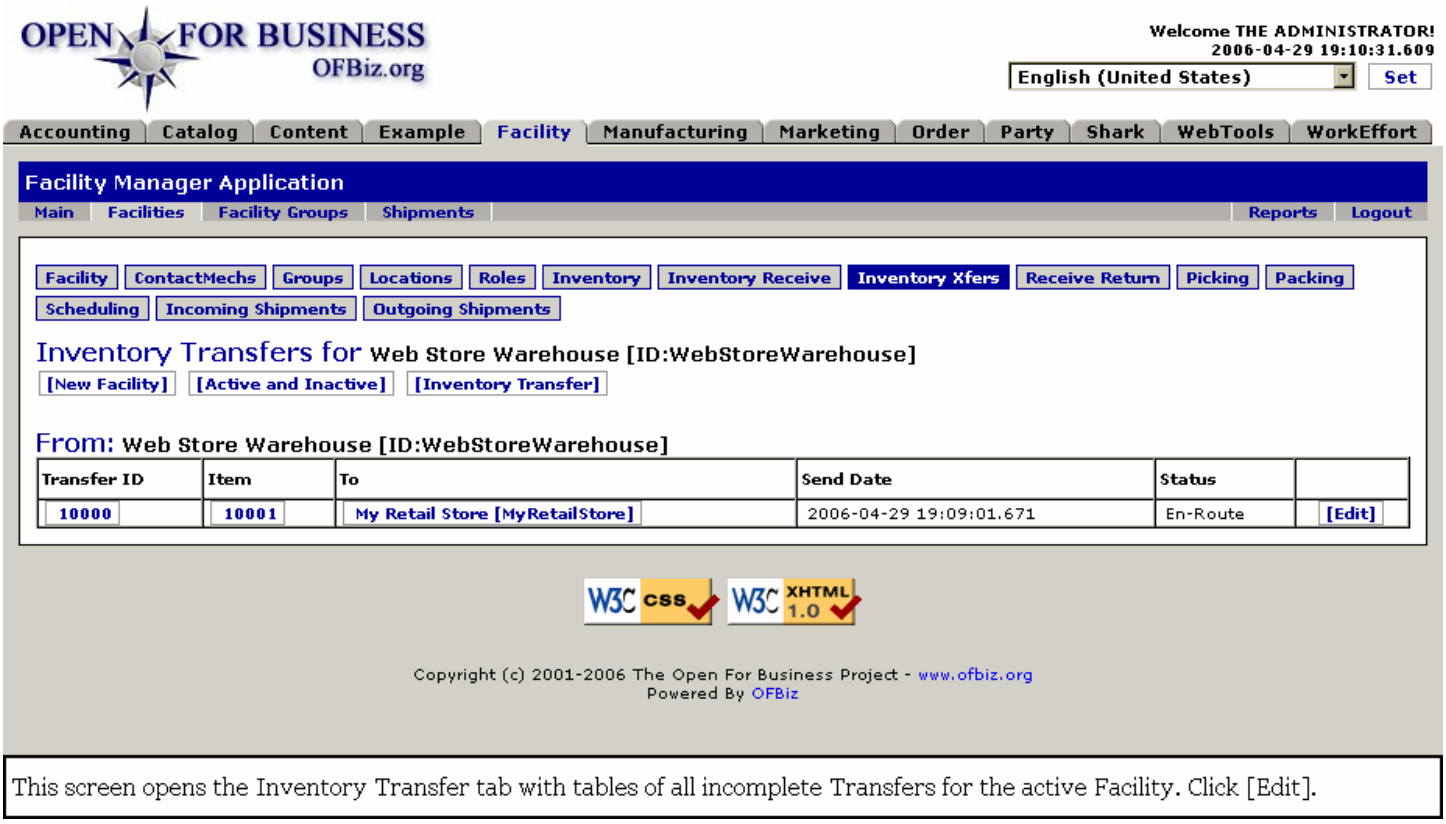
.2.9.2.16 -Receive- Link

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



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

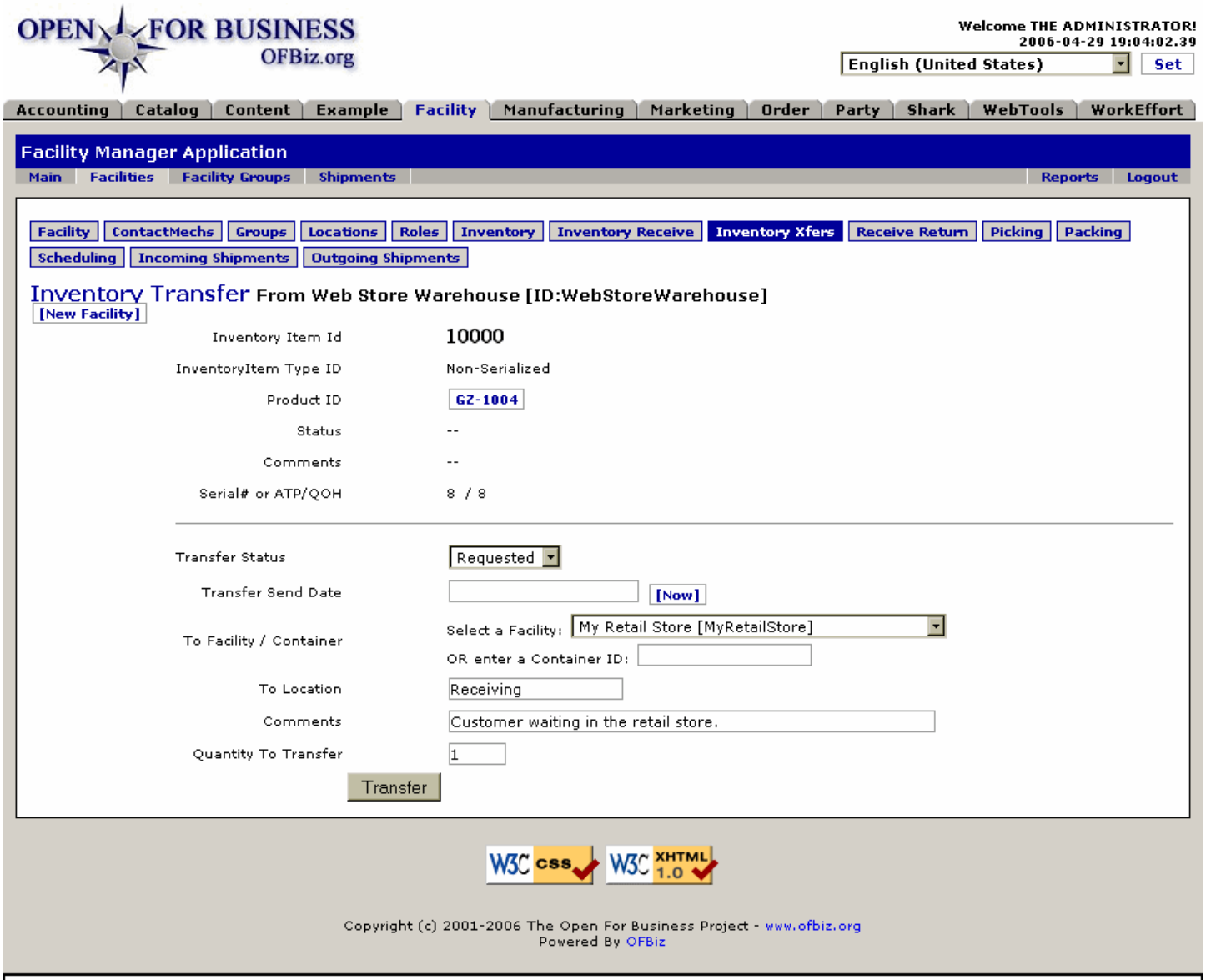
Date the transfer was taken to the point of the following Status.

.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



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
 Scheduled
 Enroute
 Complete
 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

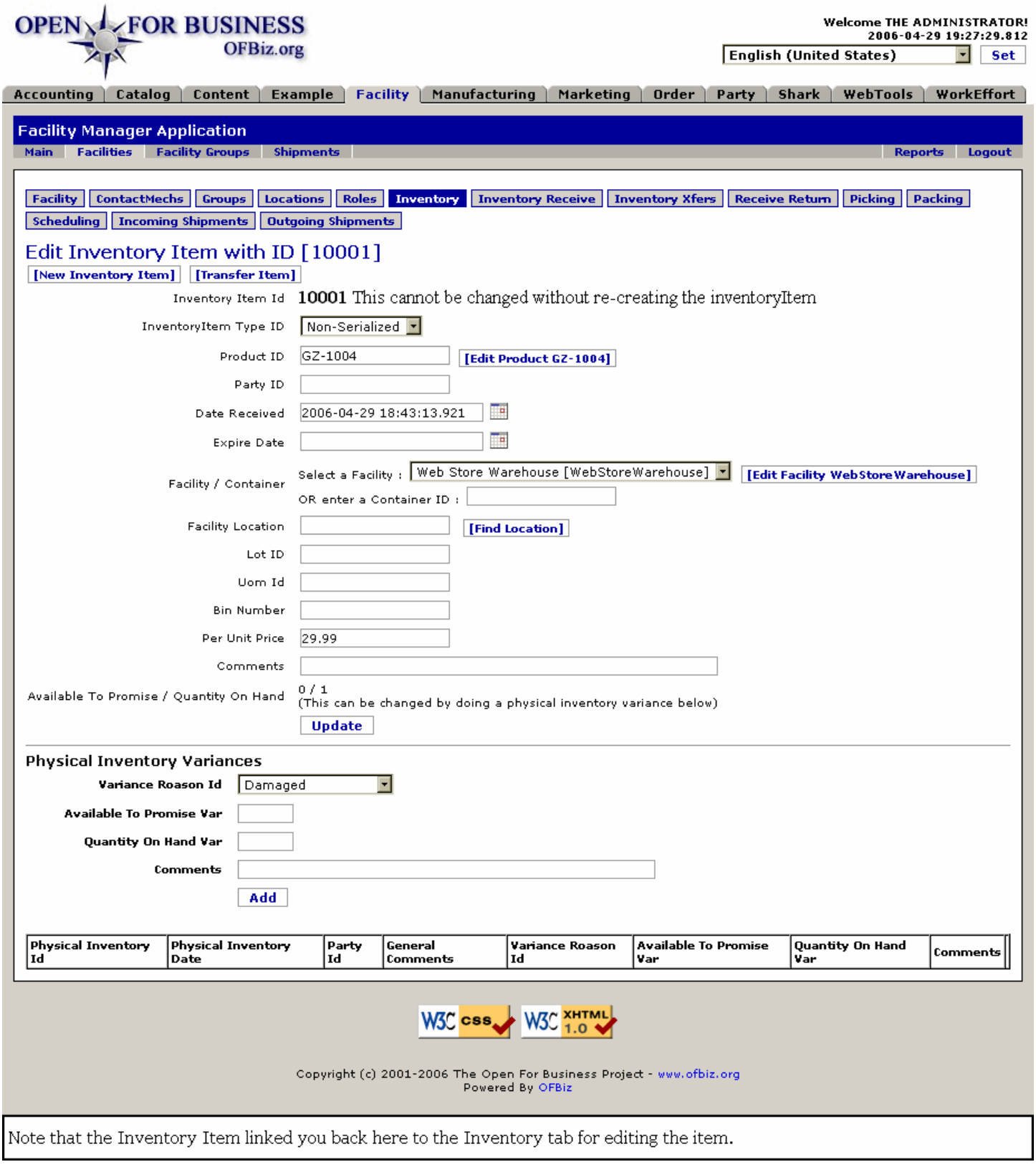
Any problems encountered or explanations needed by others.

.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



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:

Inventory Transfer process begins with the selection of an Inventory Item ID from the active Facility.

.2.10.6.1.2 link buttons

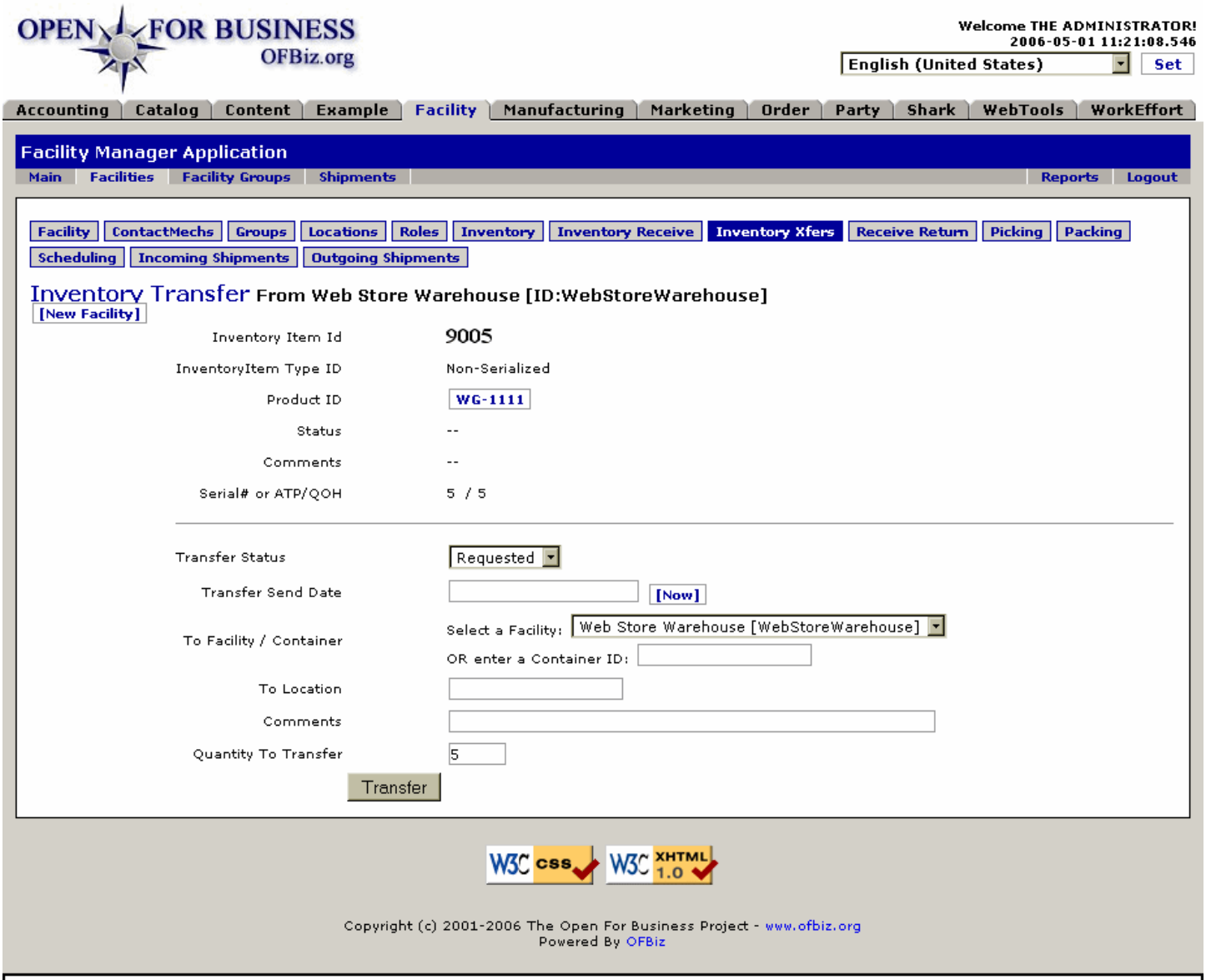
[New Facility] [Get Item] <B>[Facility] [ContactMechs] [Groups] [Locations] [Roles] [Inventory] [Inventory Receive] [Inventory Xfers] [Receive Return] [Picking] [Packing] [Scheduling] [Incoming Shipments] [Outgoing Shipments] </B>

.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



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
 Scheduled
 En-Route
 Complete
 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

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

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>
 Returned
 Available
 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.

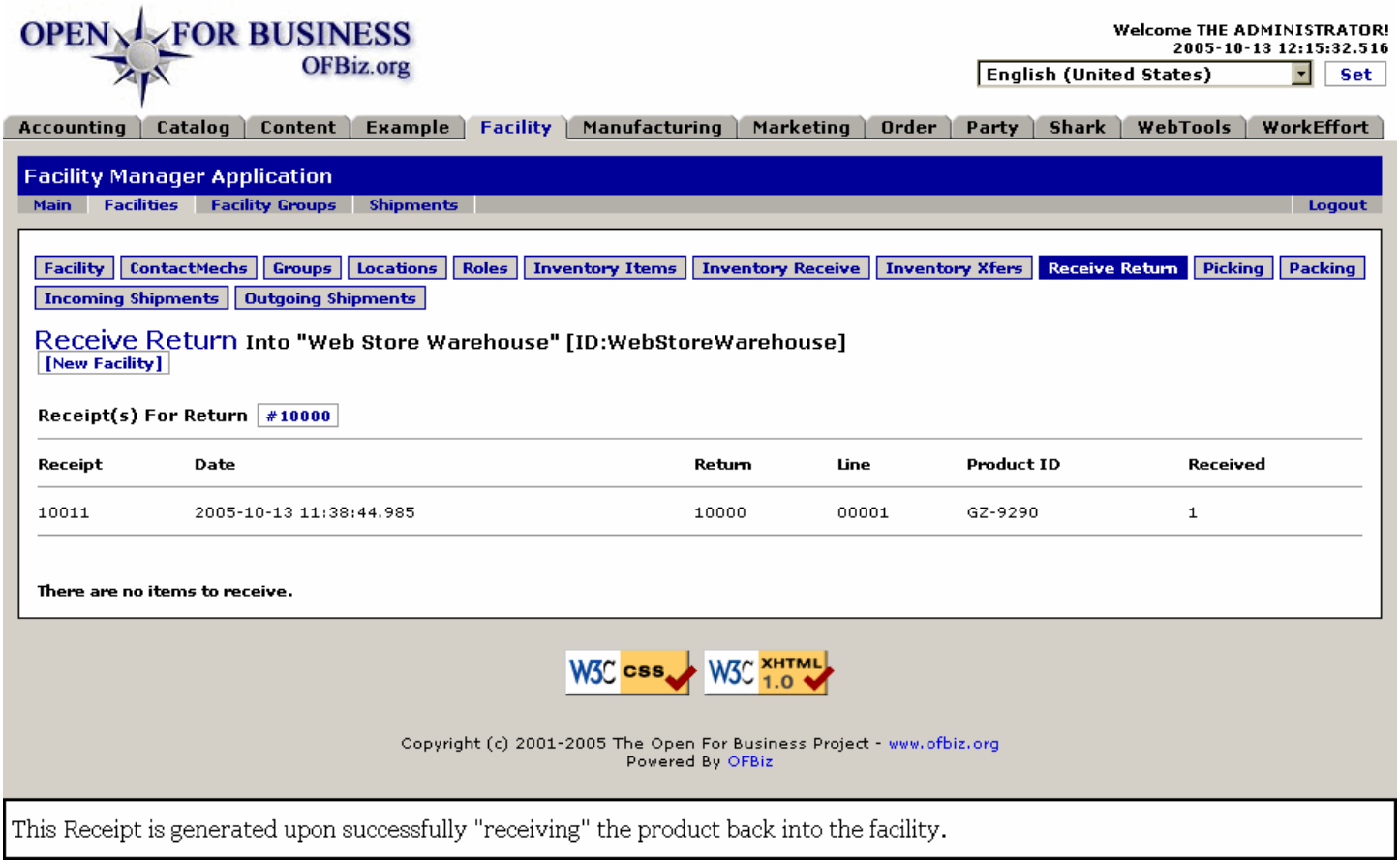
.2.11.2.5 Discussion

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 <I> Application Overview for Users </I> and go to the appropriate section of the Sales Order Process for further details.
 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:



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 receipted 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:

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.

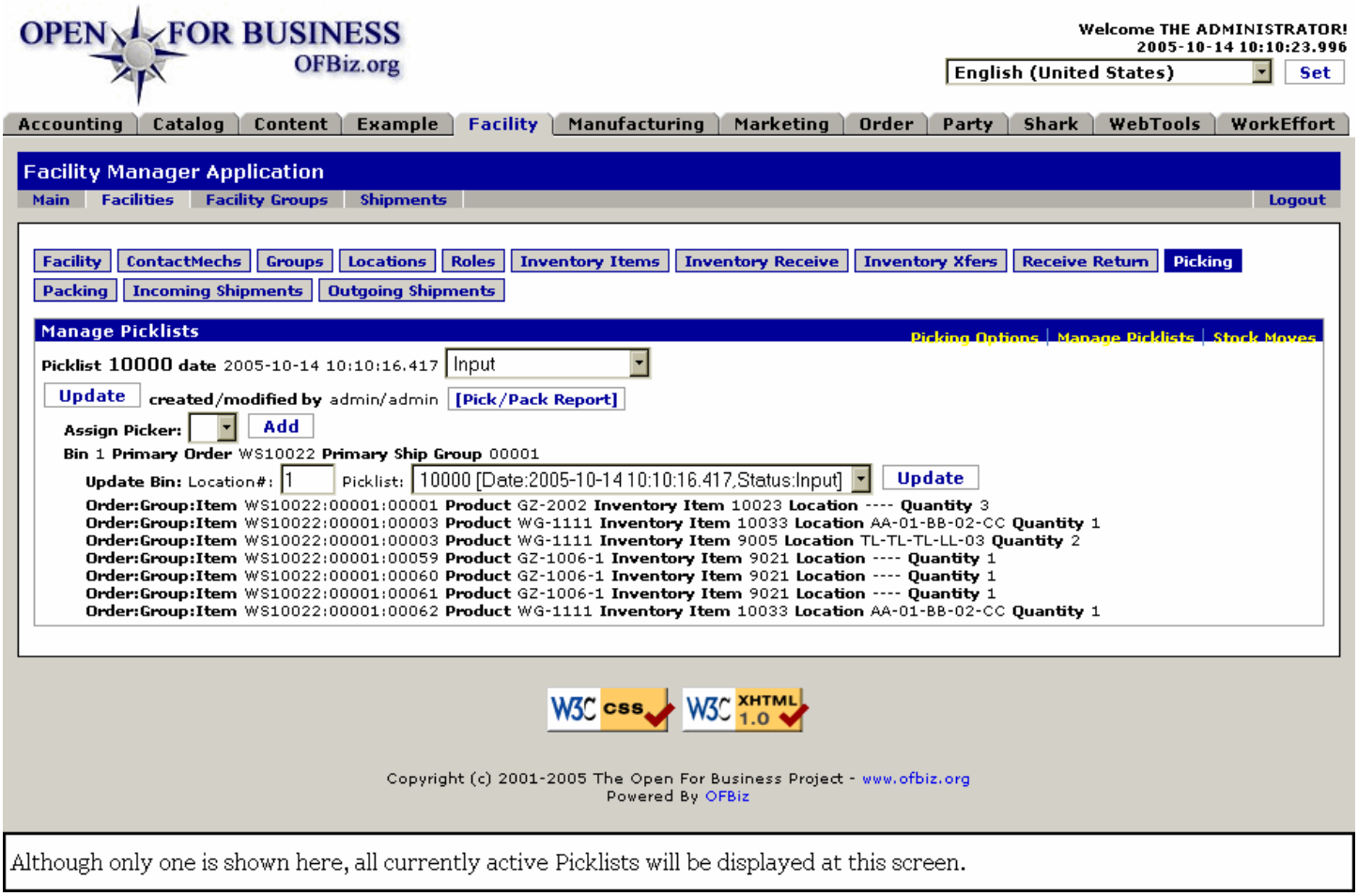
.2.12.3.4 Pick first ___

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:



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:

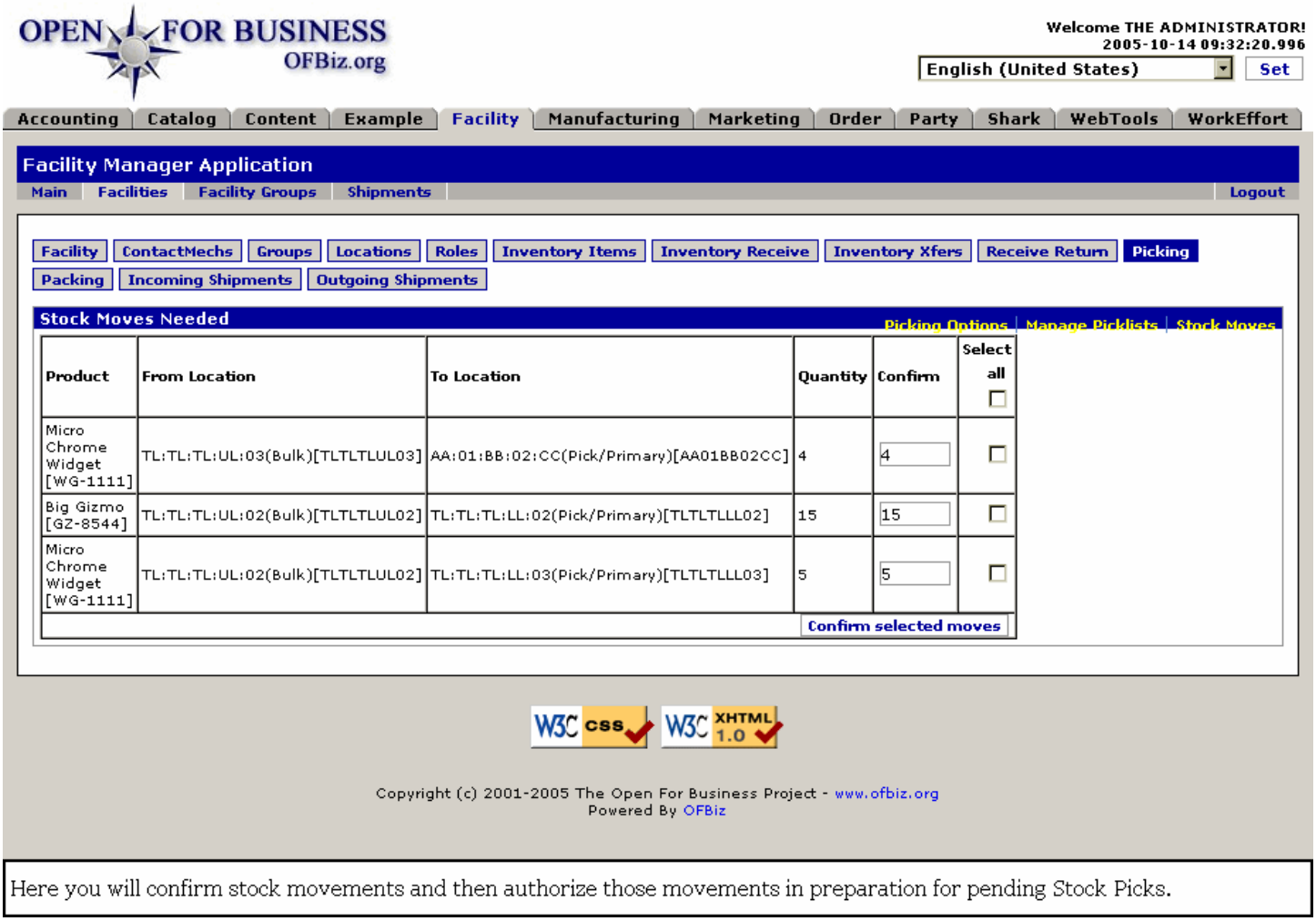
The Pack report is generated together with the Pick report; give copy to Packer or his Supervisor.

.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:



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:

.2.13.2 link buttons

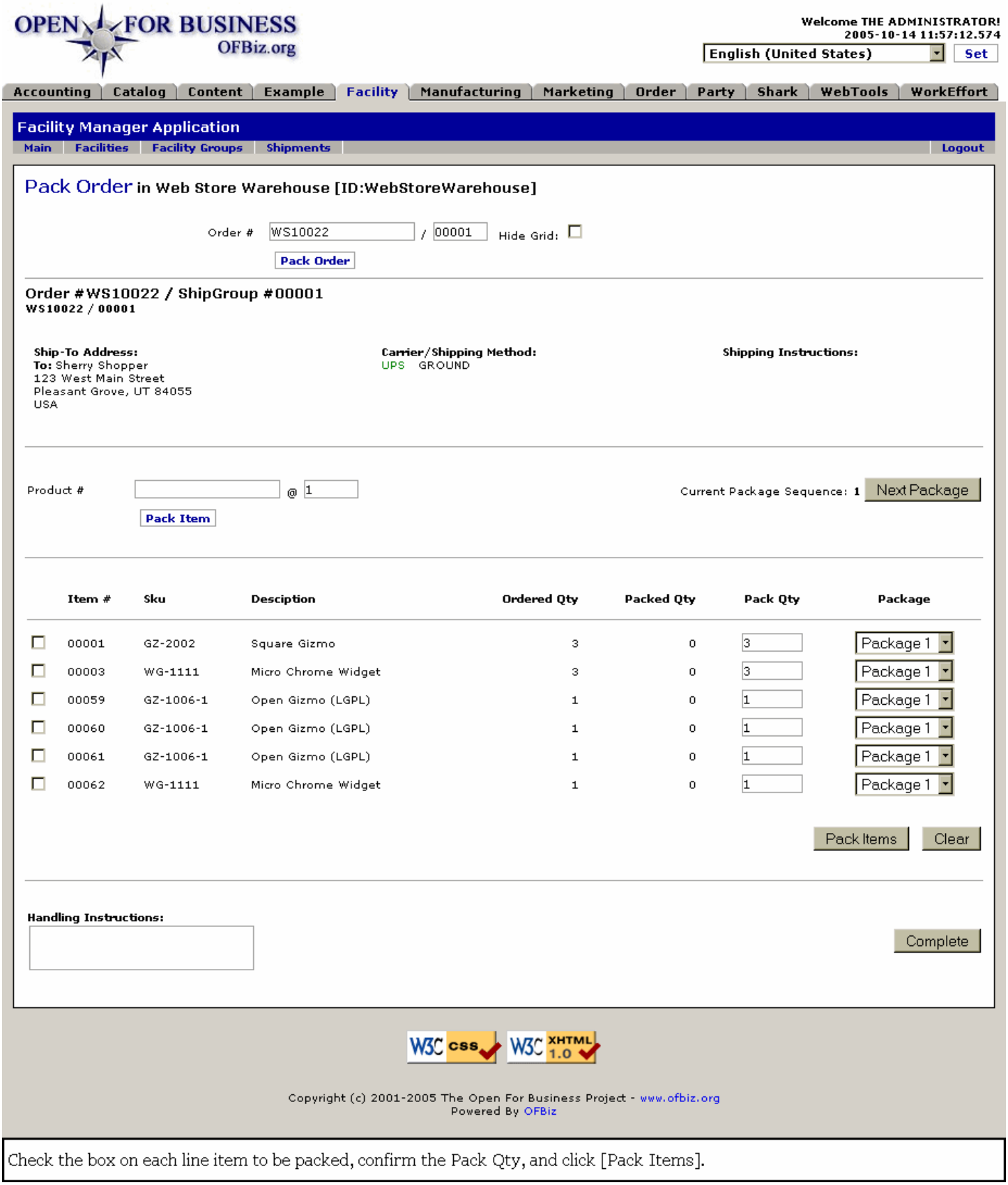
[Pack Order]

.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



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 <B>Shipments</B> with current Incoming Shipments listed in a table.

.2.16 Outgoing Shipments tab

This tab takes you to the higher level, major tab <B>Shipments </B> with current Outgoing Shipments listed in a table.

.3 Facility Groups

.3.1 FindFacilityGroup

id:[DOCFAC2403] image:

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

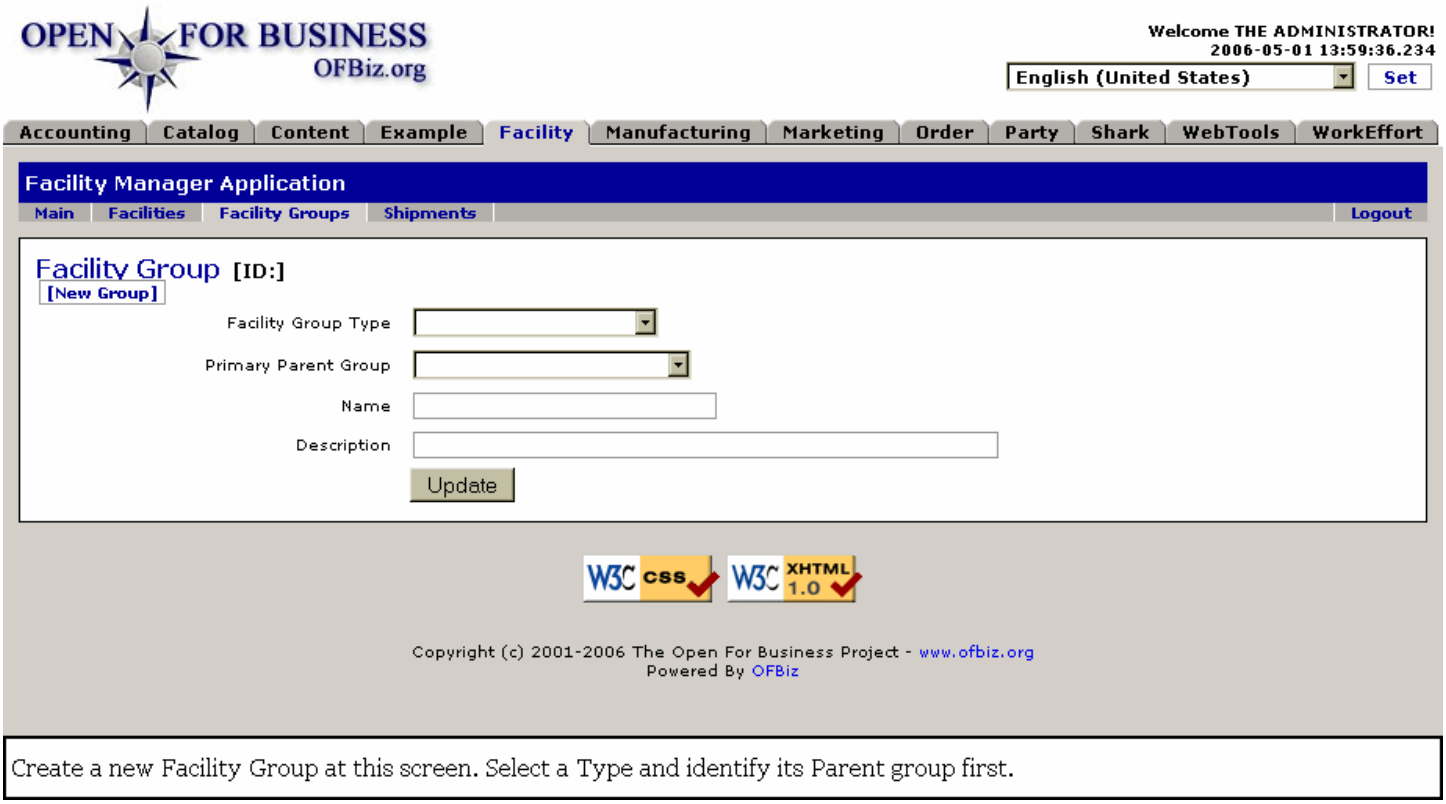
This Type could be Management Structure, Pricing Group, Manufacturing Engineers, Labor Union, whatever is programmed into the system.

.3.3.3 Description

What differentiates this Group from all others?

.3.4 New Group link

.3.4.1 EditFacilityGroup-new



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

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.

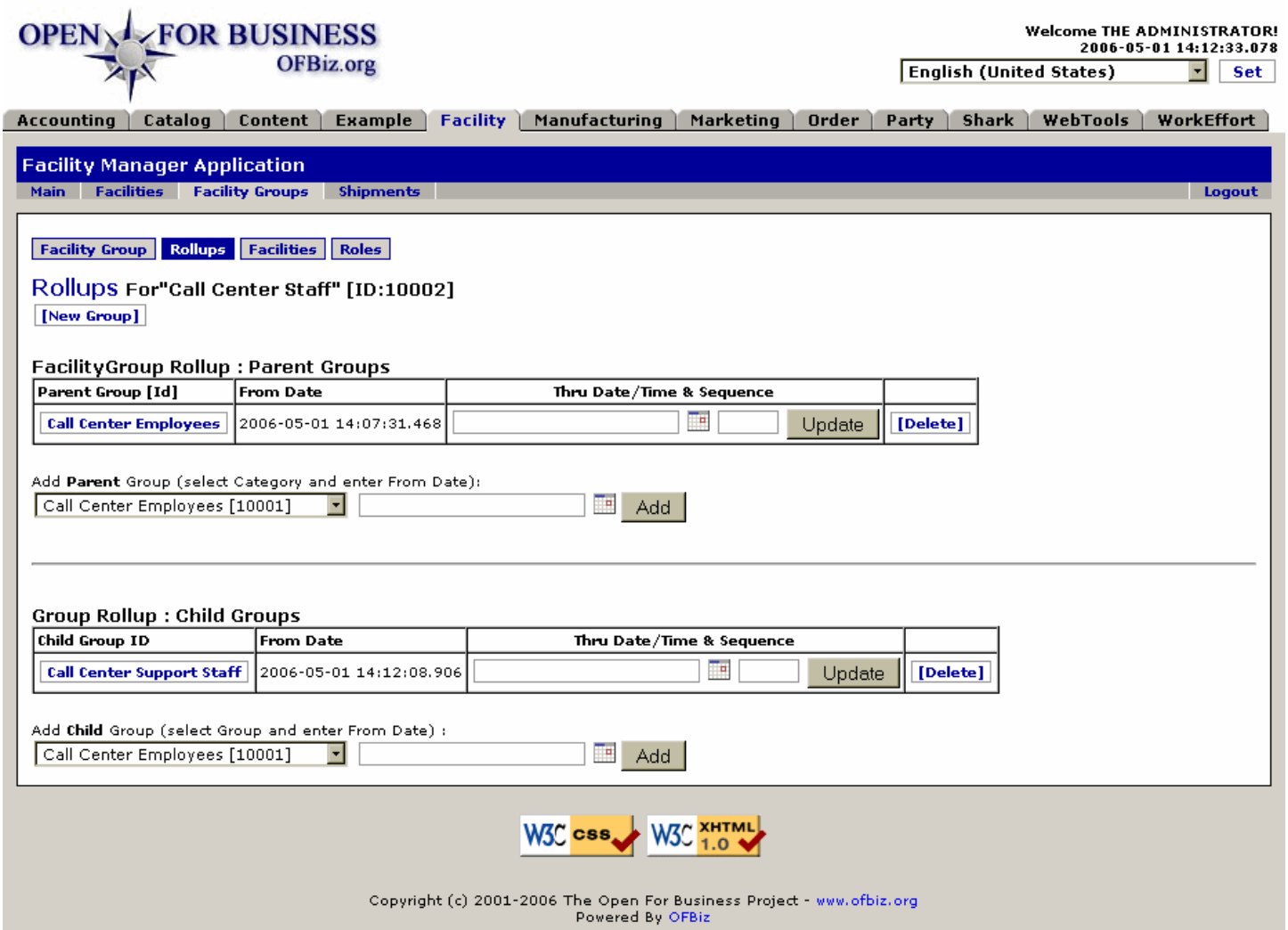
.3.5.3.5 Description

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:



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.
 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.
 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

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:

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

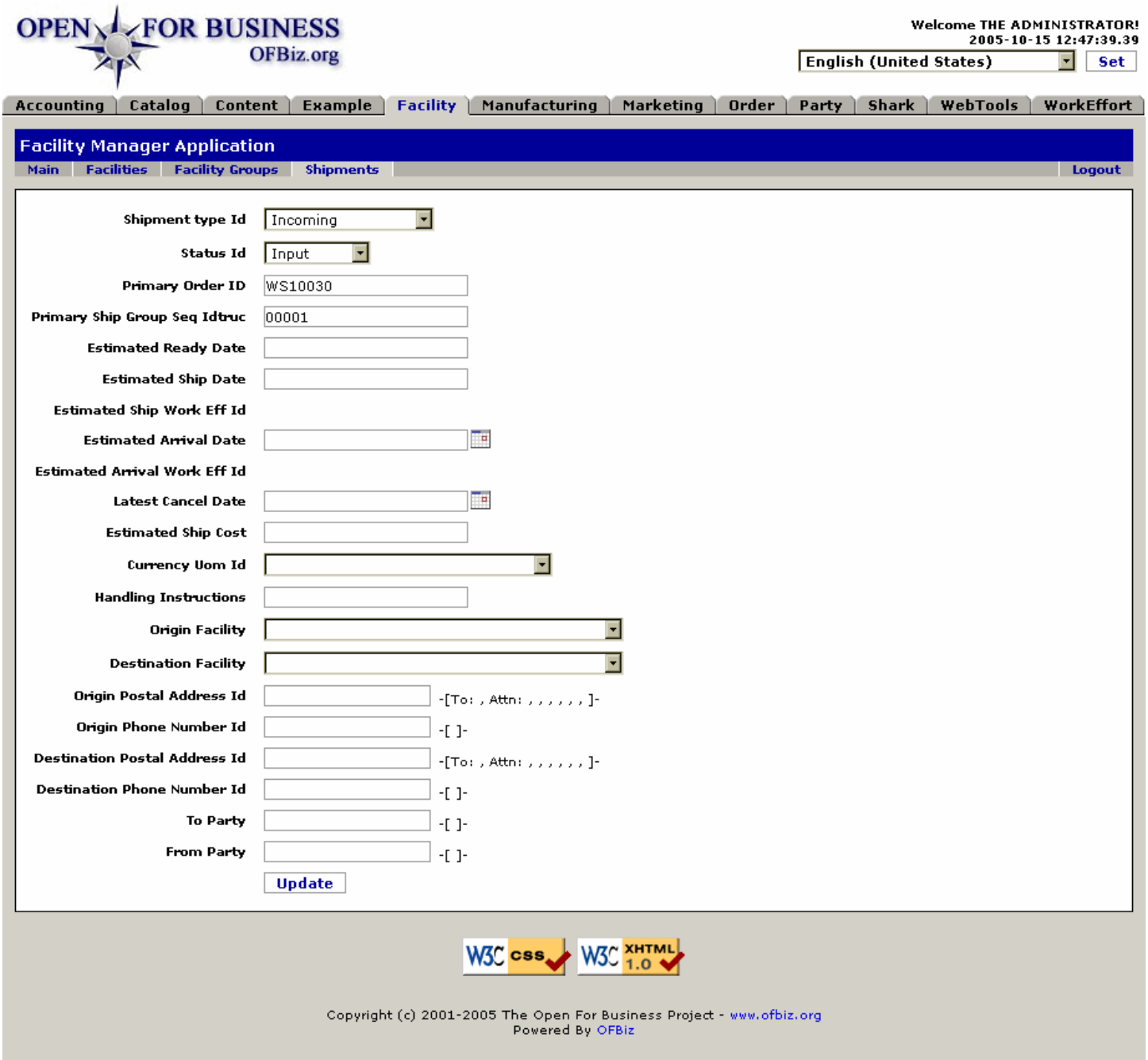
this with confidence that all the products are in the warehouse, having been manufactured by the Production Runs.

.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



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
 Outgoing
 Sales Return
 Sales Shipment
 Purchase Shipment
 Purchase Return
 Drop Shipment
 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:
<B> ...</B> (meaning 'undetermined')
 Input
 Scheduled
 Picked
 Packed
 Shipped
 Delivered
 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 confidentally 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

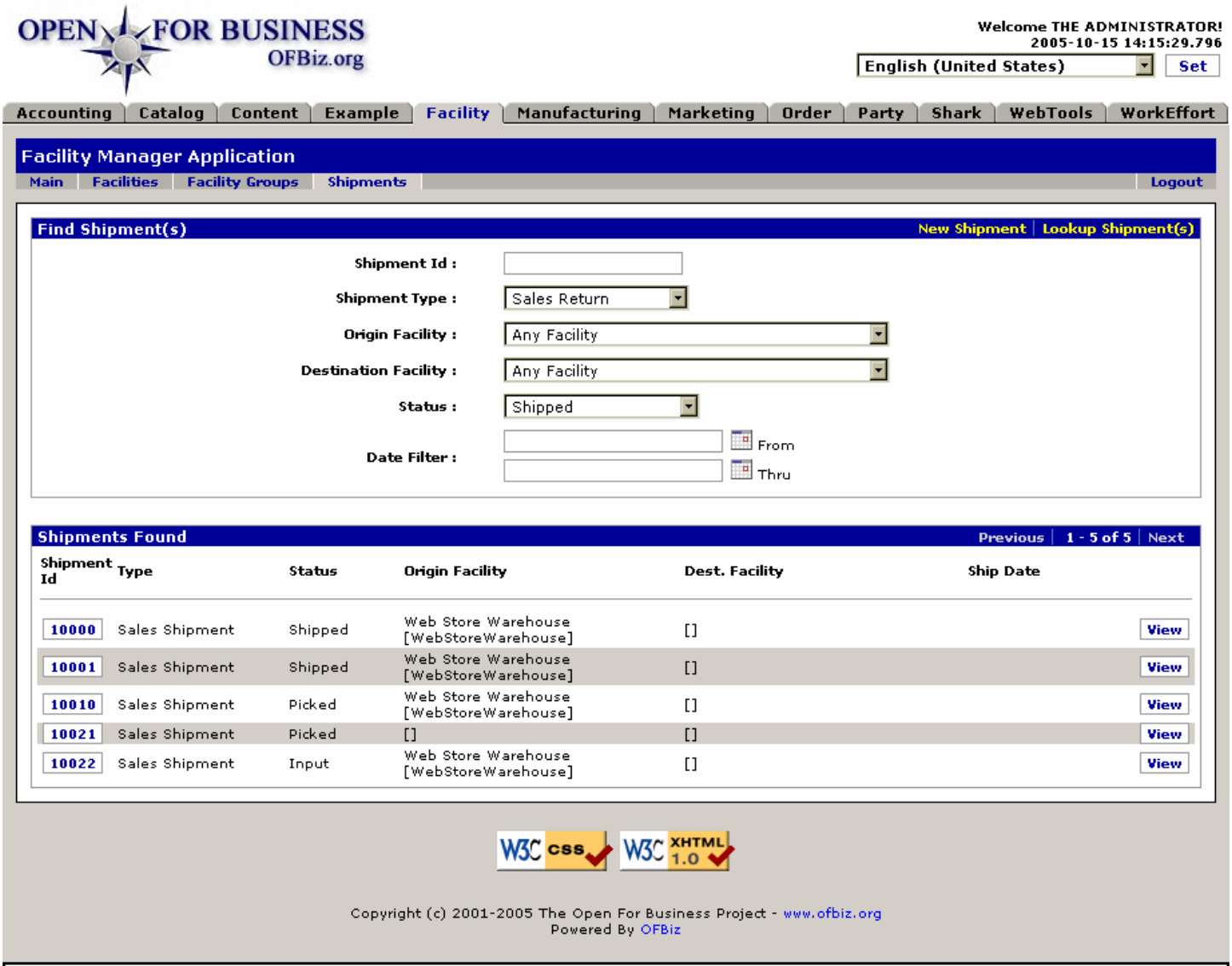
Each time this Shipment document is modified, the date will be updated here.

.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



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> ---
 Any Shipment Type
 Drop Shipment
 Incoming
 Outgoing
 Purchase Return
 Purchase Shipment
 Sales Return
 Sales Shipment
 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
 Input
 Scheduled
 Picked
 Packed
 Shipped
 Delivered
 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>

 Any Shipment Type
 Drop Shipment
 Incoming
 Outgoing
 Purchase Return
 Purchase Shipment
 Sales Return
 Sales Shipment
 Transfer</B>

.4.3.9.3 Status

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

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>
 Incoming
 Outgoing
 Sales Return
 Sales Shipment
 Purchase Shipment
 Purchase Return
 Drop Shipment
 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 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)

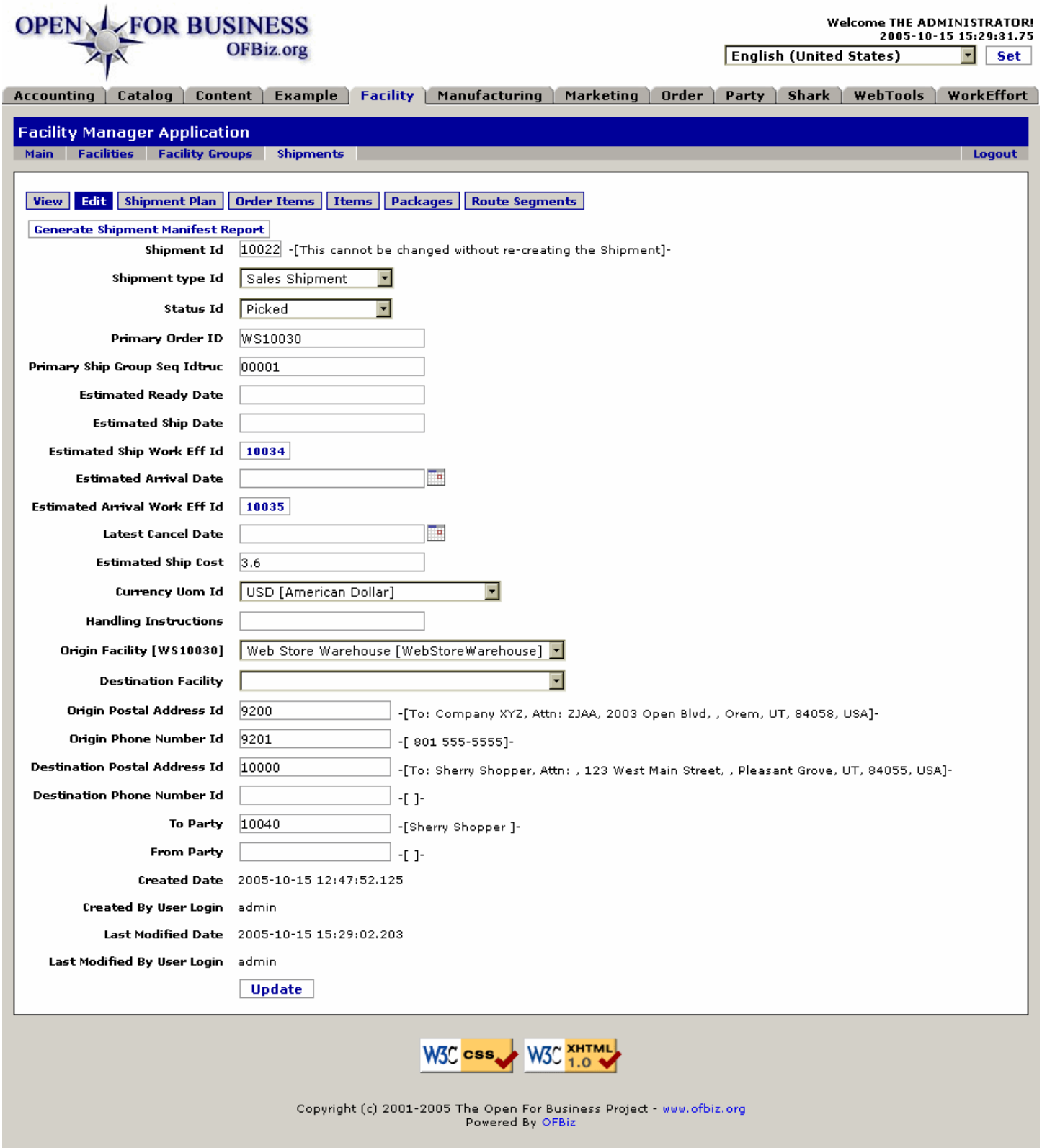
As the Packages are assembled and packed, the contents will appear here until complete. Once the Packages are gathered into a Shipment, they will no longer appear.

.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



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

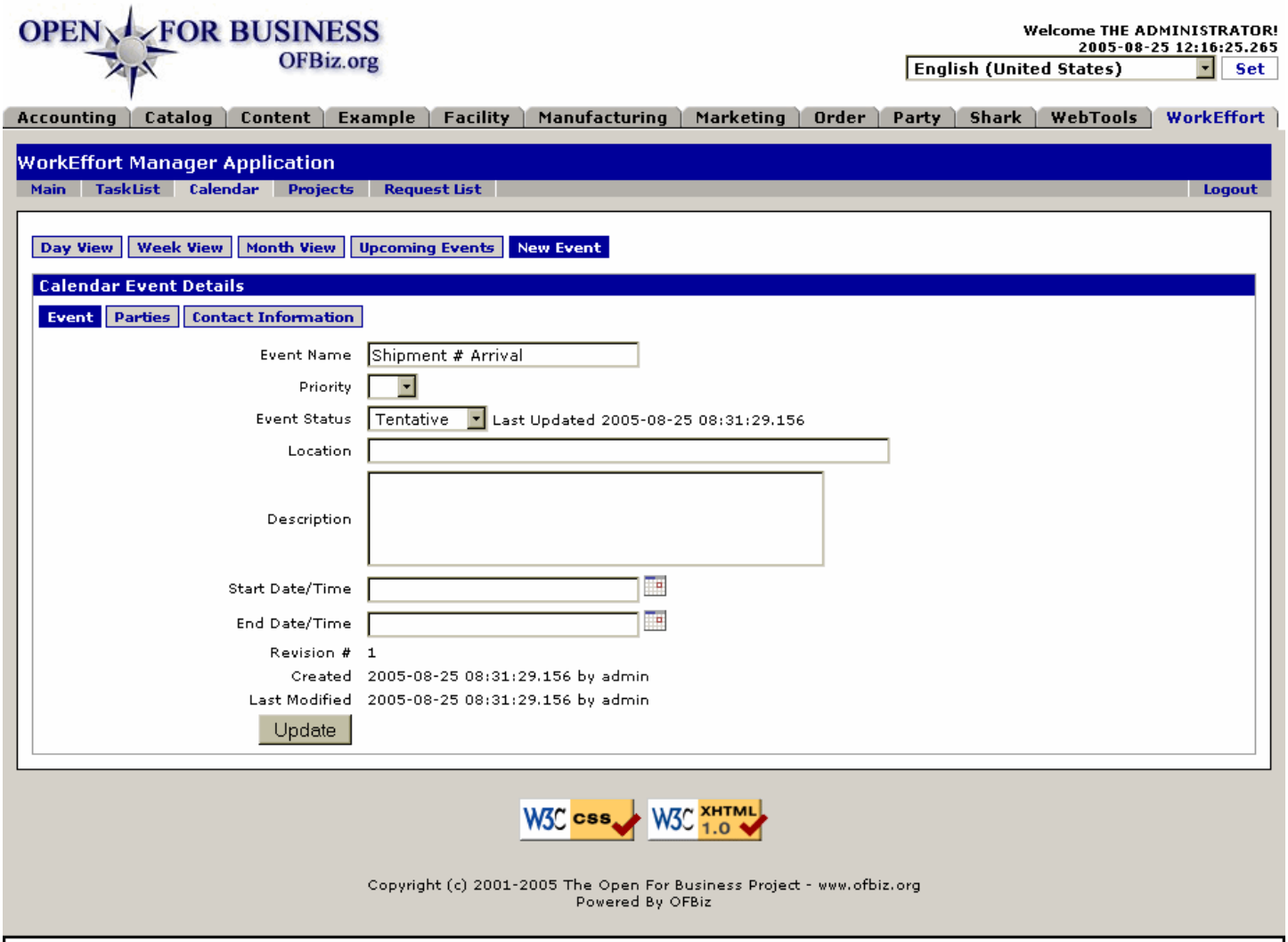
[Generate Shipment Manifest Report] [Update] <B>[View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments]</B>

.4.4.2.3 Discussion

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

.4.4.2.4 Estimated Arrival Work Eff Id

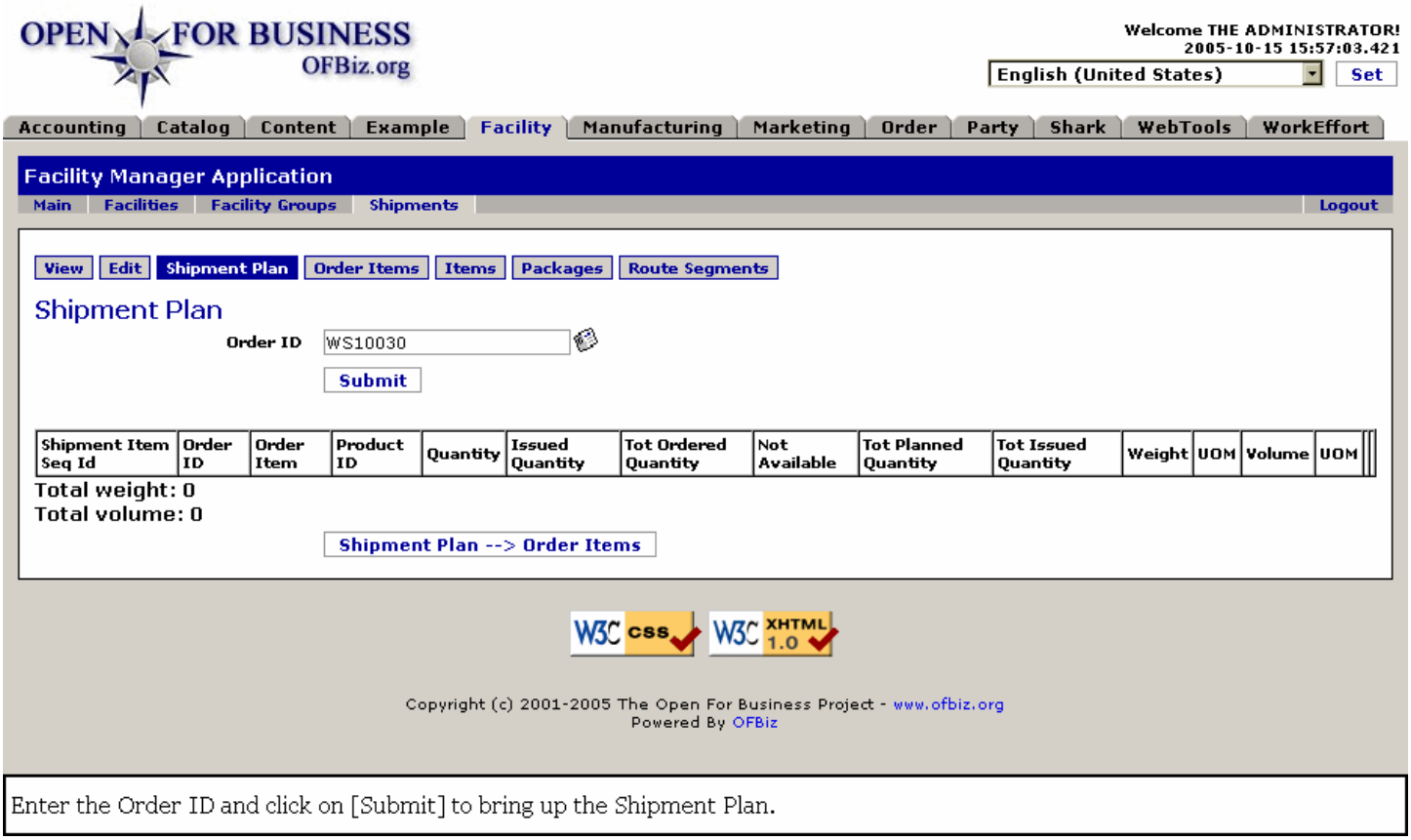
id:[DOCFAC2556] image:



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



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

.4.4.3.2 link buttons

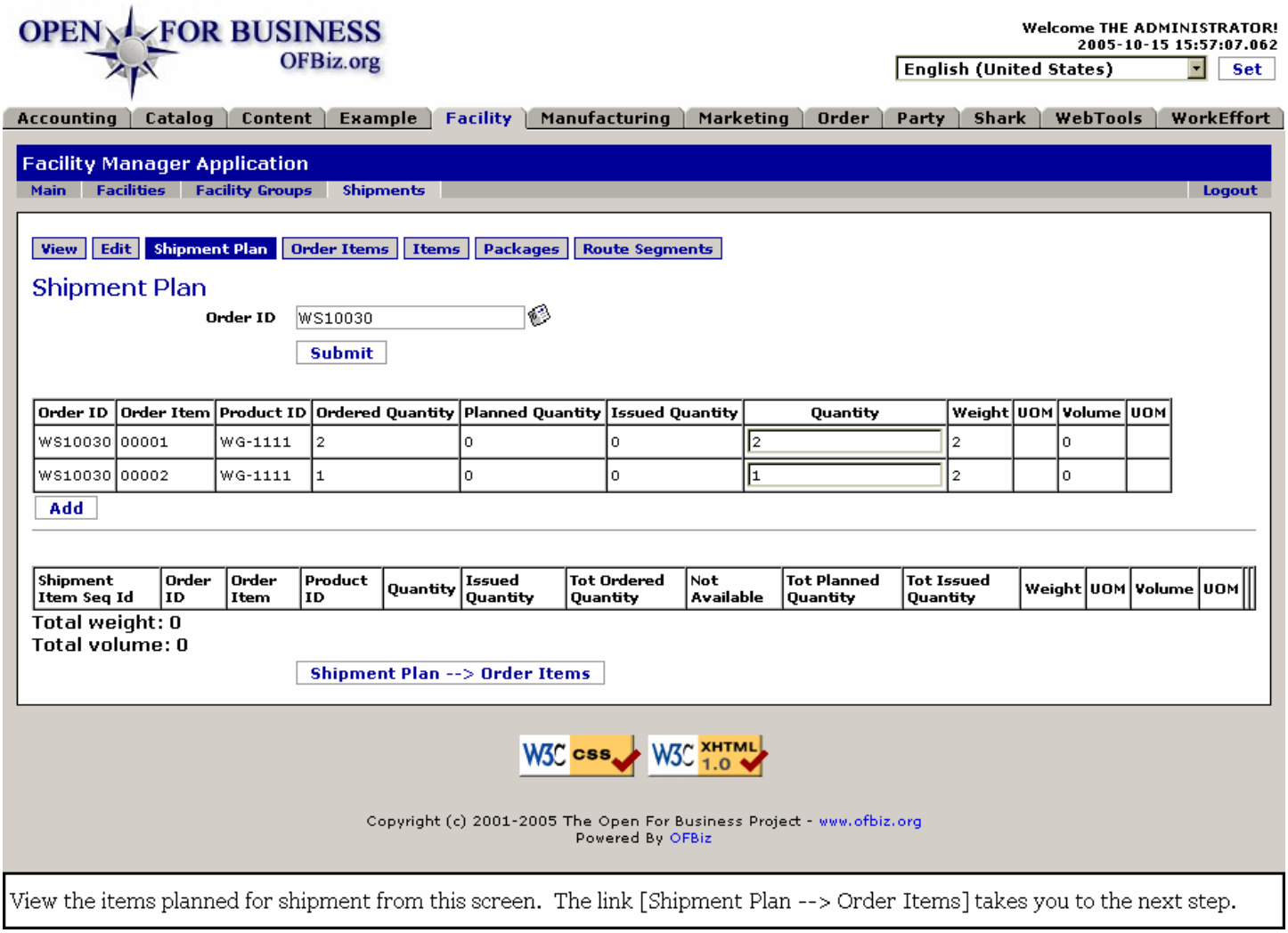
[Submit] [Shipment Plan --> Order Items] <B>[View] [Edit] [Shipment Plan] [Order Items] [Items] [Packages] [Route Segments] </B>

.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



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
 Order ID
 Order Item
 Product ID
 Quantity
 Issued Quantity
 Total Ordered Quantity
 Not Available
 Total Planned Quantity
 Total Issued Quantity
 Weight
 UOM
 Volume
 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

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>

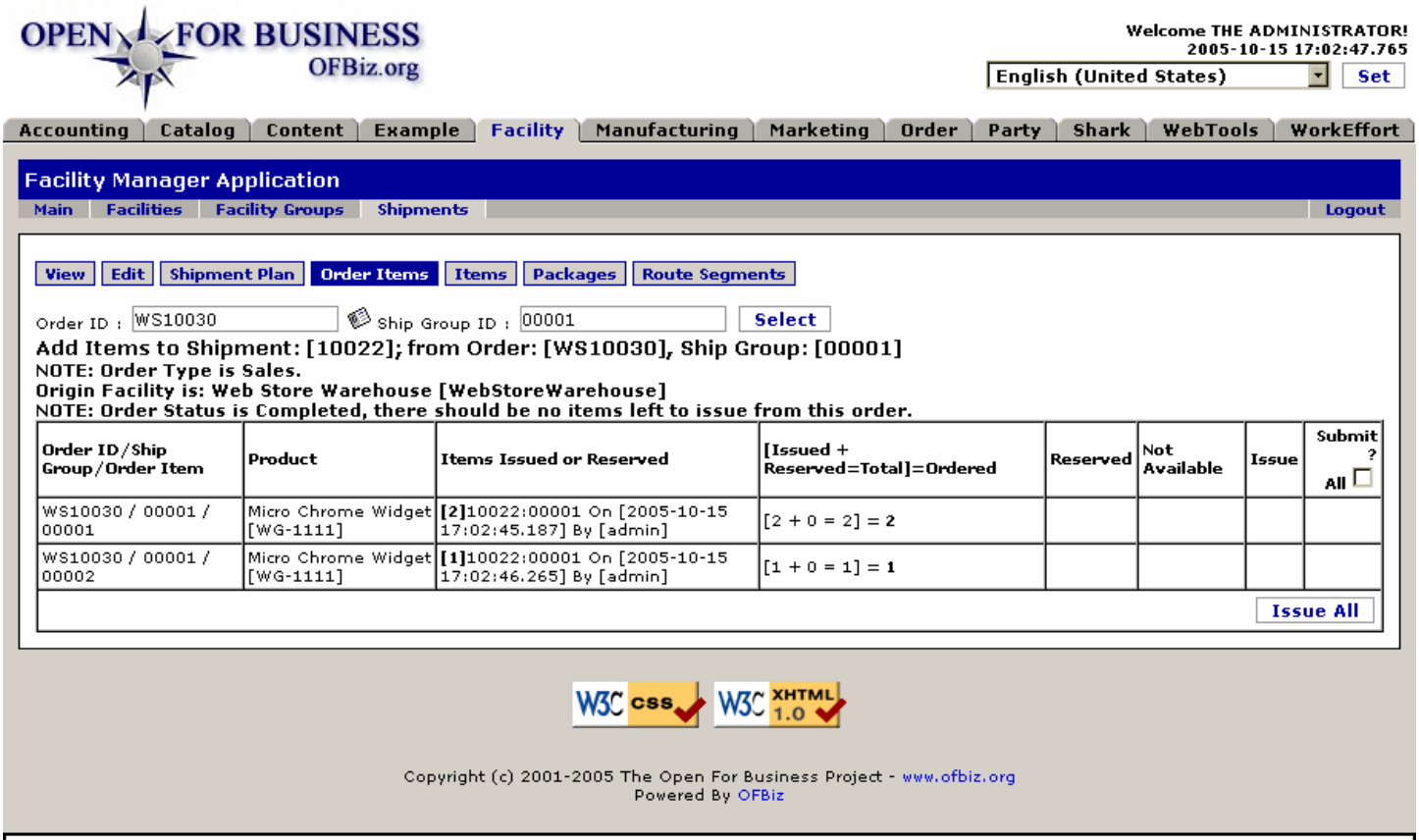
.4.4.4.3 Discussion

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



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.

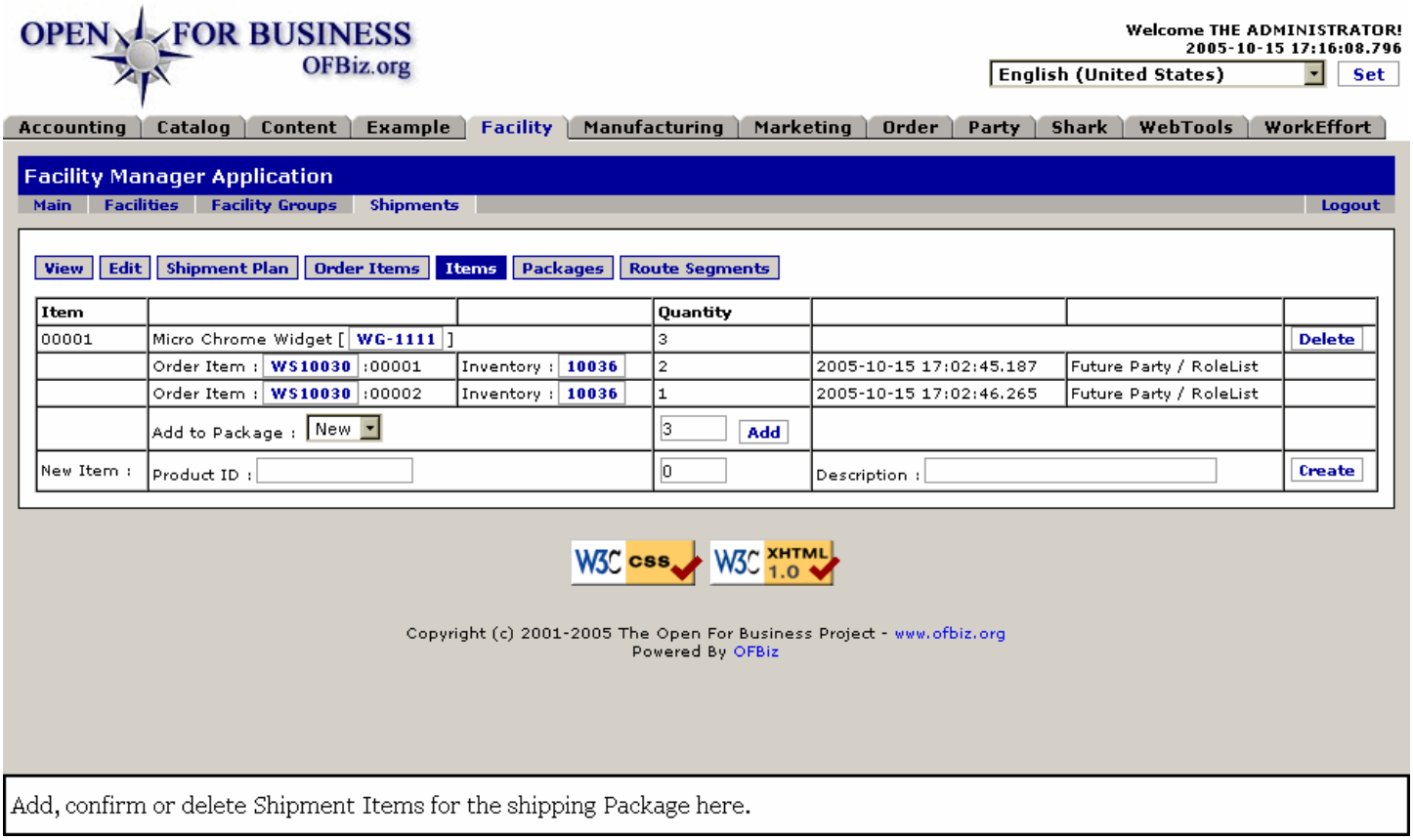
.4.4.5 Items

.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:



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.

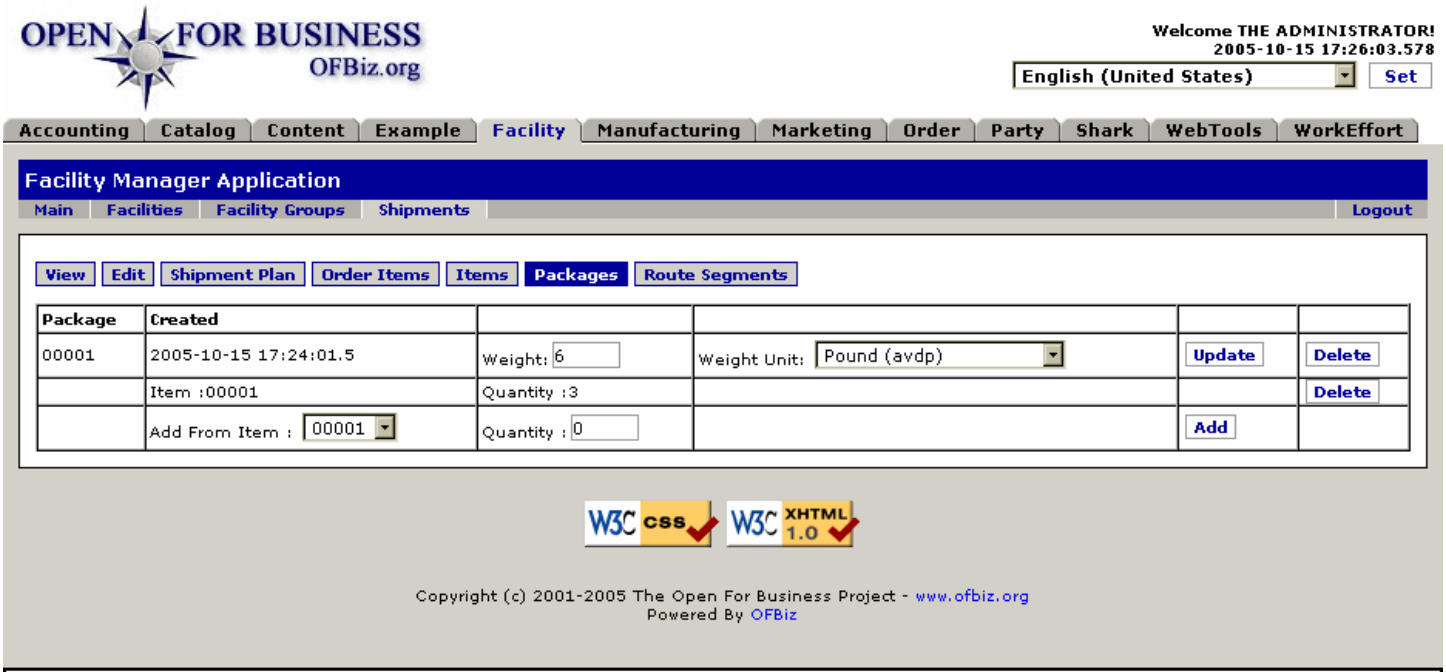
.4.4.5.7 Other details

Transaction dates and other details can be shown here.

.4.4.6 Packages

.4.4.6.1 EditShipmentPackages

id:[DOCFAC2610] image:



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

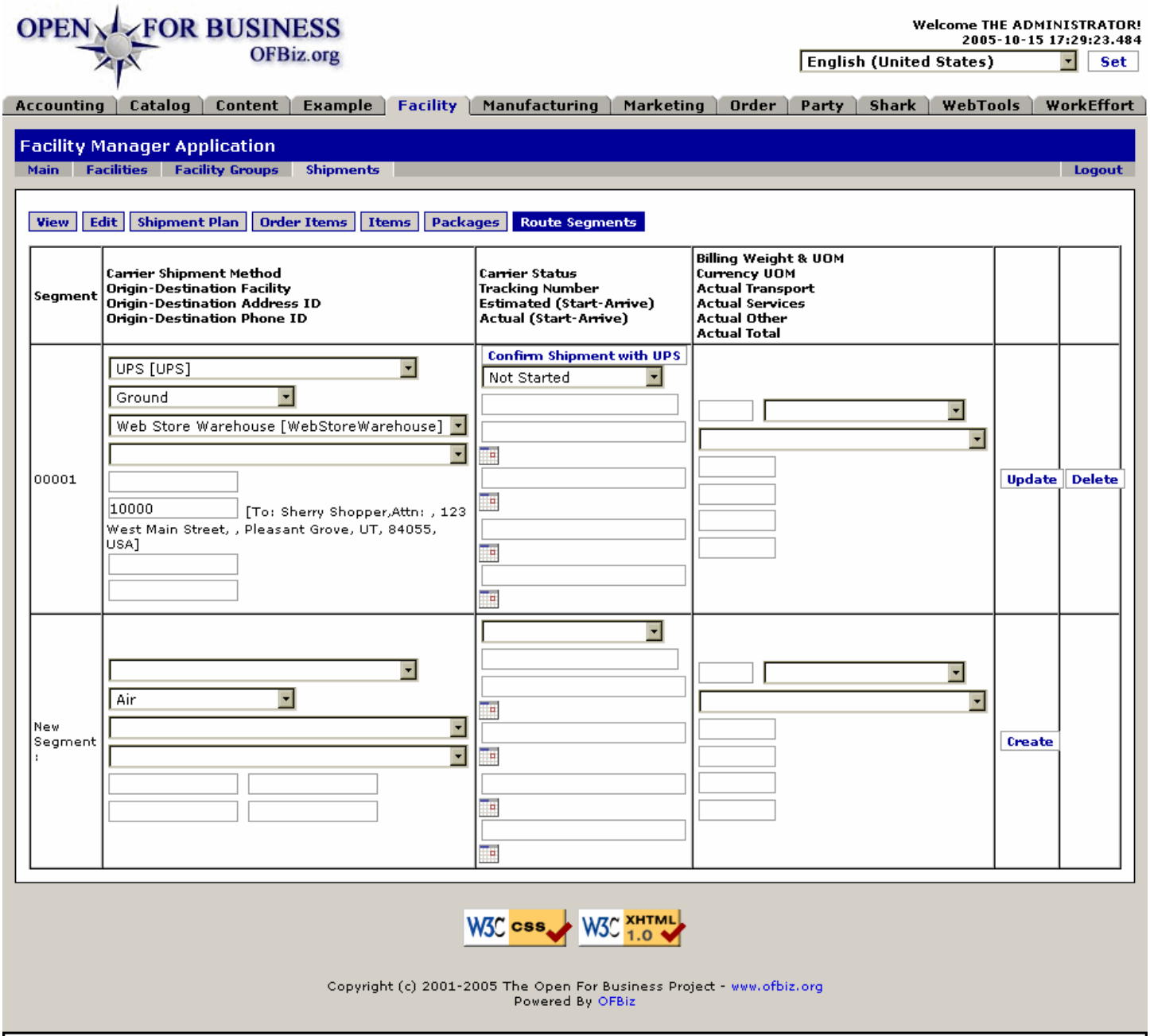
.4.4.6.5 Other details

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



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.