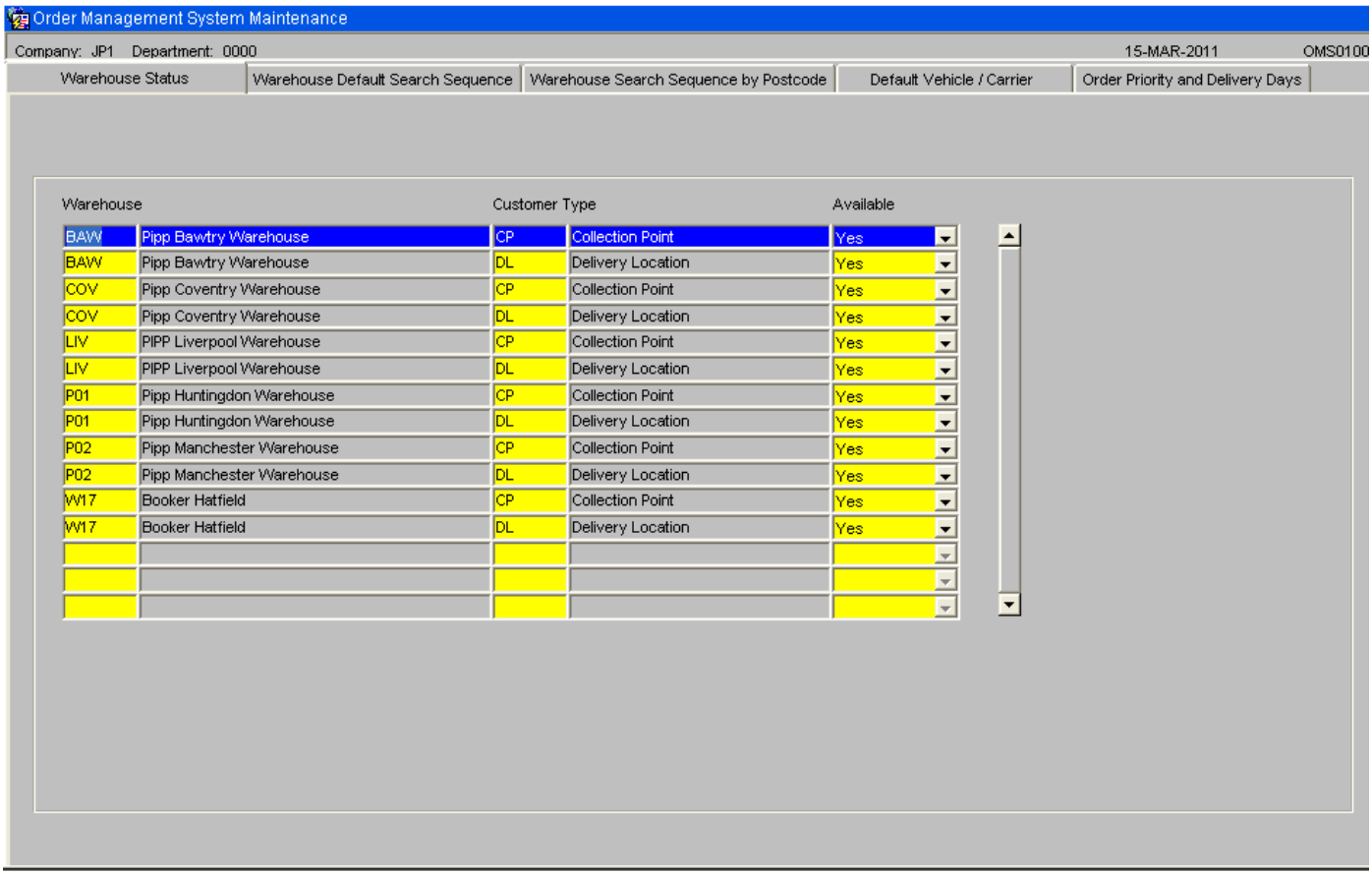
## OMS Maintenance - Warehouse Status Maintenance

A tab named ?Warehouse Status? will be included on the ?OMS Maintenance? screen.

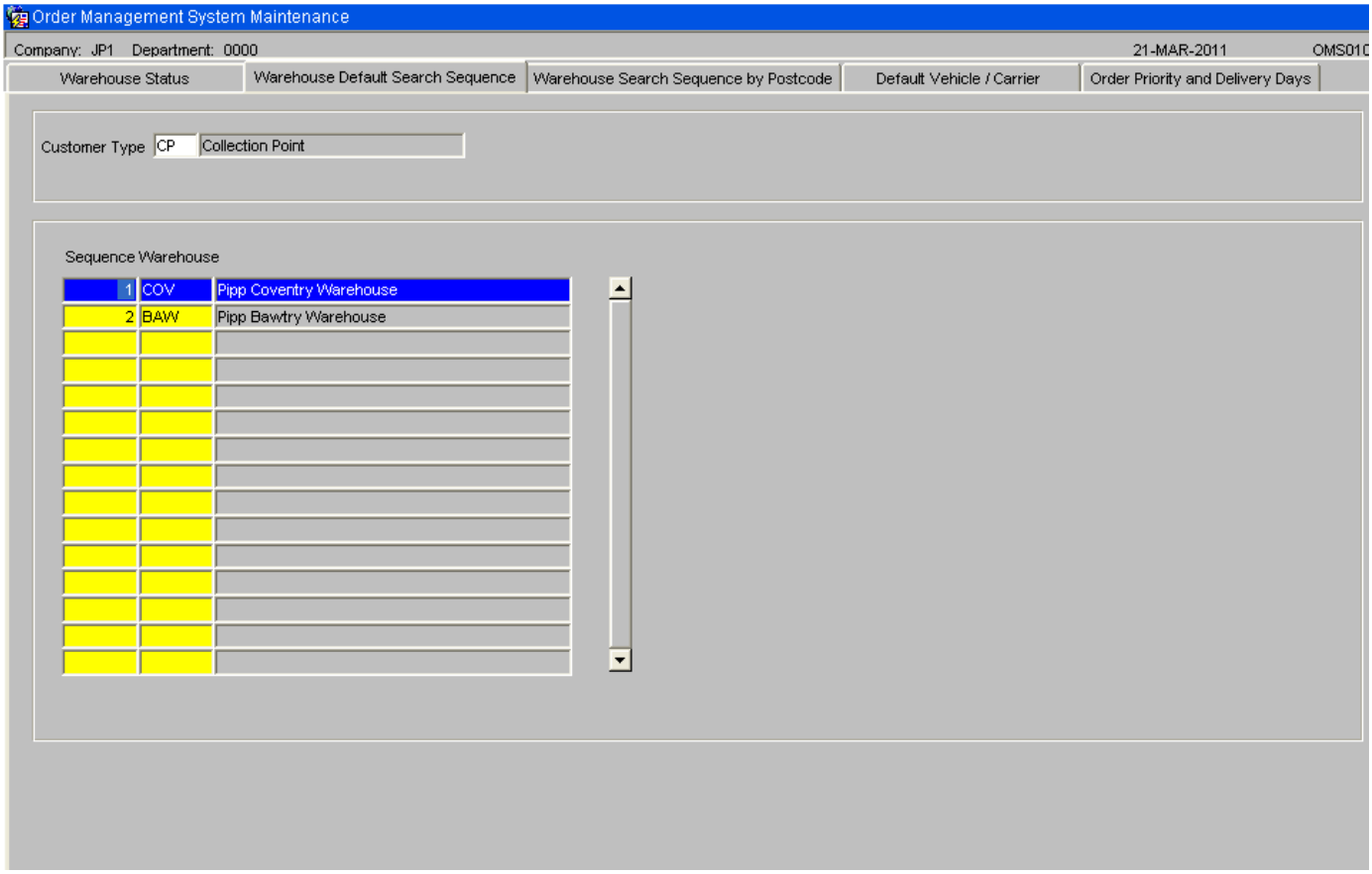
This screen will be used to enter which customer types can be serviced by which warehouses. An **?Available Flag?** will be included to allow a warehouse to be set as unavailable for orders from a certain customer type.




This table will be checked when EDI orders are assessed to decide which warehouse to use to fulfil the orders.

## OMS Maintenance - Warehouse Default Search Sequence

A tab named ?Warehouse Default Search Sequence? will be included on the ?OMS Maintenance? screen. This screen will be used to enter which customer types can be serviced by which warehouse(s)




This screen will be used to enter which customer types can be serviced by which warehouse(s) in which sequence. It is expected that postcodes will have their own warehouse search sequence. This table will serve as a backup when a delivery address exists where the delivery point / postcode settings cannot be found.

## OMS Maintenance - Warehouse Search Sequence by Post Code

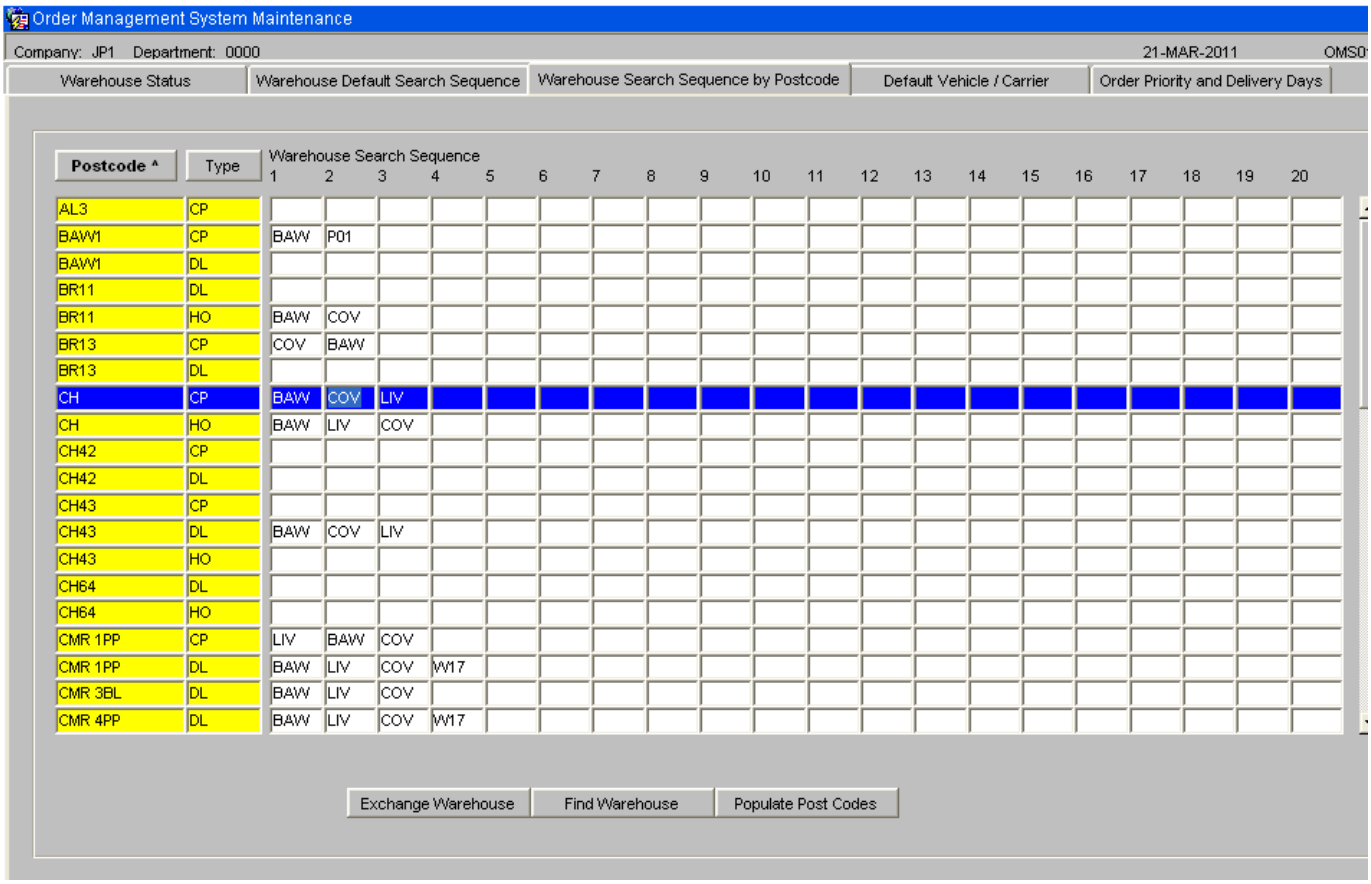
A tab named ?Warehouse Search Sequence by Post Code? will be included on the ?OMS Maintenance? screen.

Generally, the first part of the postcode will be used but it will be possible to enter a whole postcode.

The system will use the postcode of the customer delivery address and then search for the warehouse search sequence for this postcode as follows:-

- Search for an exact postcode match.
- Search for first 4 characters of postcode
- Search for first 3 characters of postcode
- Search for first 2 characters of postcode
- Search for first character of postcode

The customer type is included as different customer types could have a different warehouse search sequences.




The postcodes will have a list of warehouses attached. This is the sequence in which warehouses will be checked when searching for available stock. Unavailable warehouses will be highlighted in red.

There will be options to sort this data by postcode then customer type or by customer type then post code. This will be controlled by clicking the buttons **?Postcode?** or **?Cust Type?** at the top of the page.

A postcode or part postcode can be found by clicking **?Enter Query?** then selecting the postcode field and entering the start of the postcode. Upon ?Execute Query? the postcodes will be found. When a new warehouse search sequence is entered, an error will be given if the same warehouse id occurs more than once. The screen will include the following function buttons: -

**Populate Post Codes Button.**

A new database package will be written to populate the postcodes and customer types on the warehouse search sequence table. This package will read through the customer table and link to the customers address to find the postcode. The system will use the first part of the postcode, the section before the space. If a space is not found in the postcode then the first 4 characters will be used. If the combination of customer type and start of postcode does not exist, then a record will be created with a blank warehouse. When the population is complete, the system will display the newly created postcodes.

**Exchange Warehouse Button**

This button will be used to replace a particular warehouse with another warehouse. When this button is clicked, the user will be prompted to enter:

- The warehouse ID to be replaced
- The replacement warehouse ID.
- Confirm Exchange.

The system will read through all warehouse search sequences looking for the warehouse ID that is to be replaced. When the warehouse ID is found, it will be replaced by the new warehouse ID. If the new warehouse ID already exists as one of the warehouses in the search sequence then the old warehouse ID will be removed.

**Find Warehouse Button**

When this button is clicked, the user will be prompted to enter:

- The warehouse ID to search for.
- Confirm

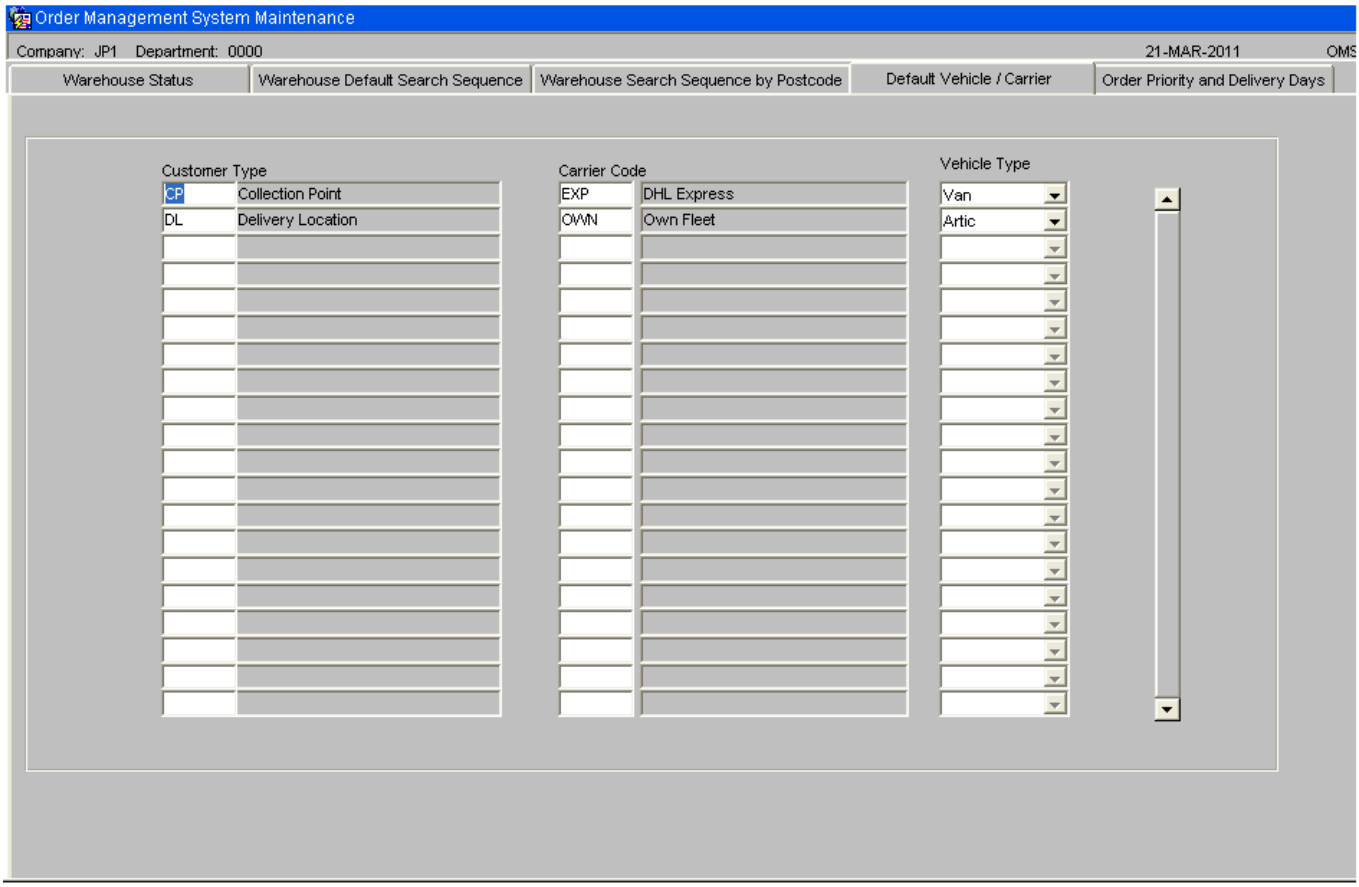
The system will read through all warehouse search sequences looking for the entered warehouse ID. The system will then display any postcodes that include this warehouse as part of the search sequence.

## OMS Maintenance - Default Vehicle / Carrier

A tab named ?Default Vehicle / Carrier? will be included on the ?OMS Maintenance? screen.

This tab will be used to maintain the default carrier code and vehicle type for each customer type. Only one carrier code and vehicle type can be entered for a single customer type.

When in the carrier code field, control L can be type to display the list of values. A list of valid vehicle types will be displayed when the field is clicked upon to allow one of the displayed vehicle types to be selected. Both the vehicle type and carrier code will be validated.

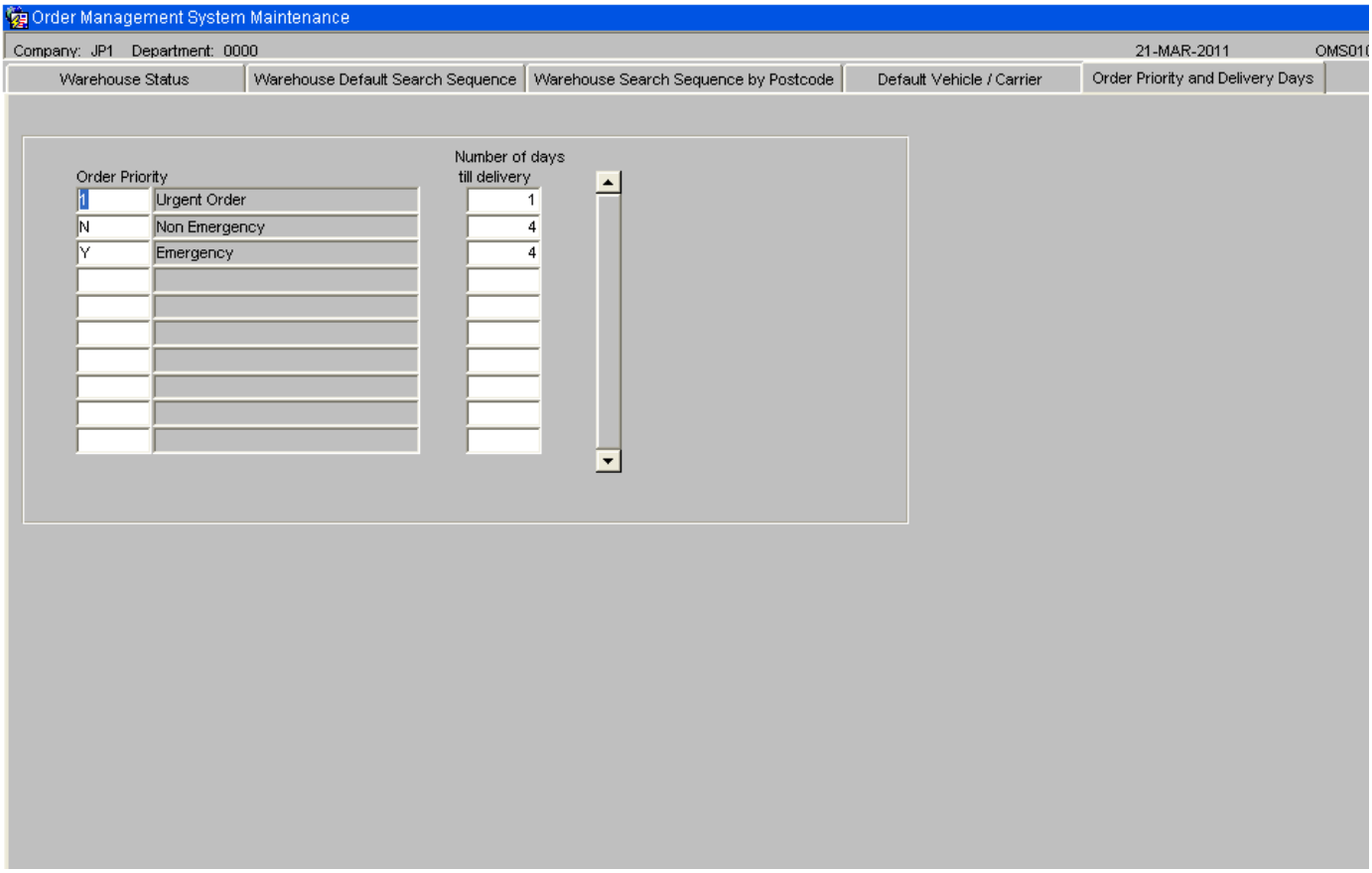



When the anticipated orders are created, the customer type will be used to find the correct carrier code for the order.

During the creation of the anticipated orders, the vehicle type will be set to the vehicle type set up against the customer?s delivery address. If a customer does not have their default vehicle type set then the vehicle type will be set to the vehicle type set up in this screen for the relevant customer type.

## OMS Maintenance - Order Priority and Delivery Days

A tab named ?Order Priority and Delivery Date? will be included on the ?OMS Maintenance? screen.




This tab will be used to control the setting of the delivery date based upon the order priority. The order priority will be entered with the number of days till delivery. If the number of days till delivery is set to zero then the delivery date will be set to today?s date. If the number of days till delivery is set to 1 then the delivery date will be set to tomorrow?s date.

The setting of the delivery date will be done when the anticipated order is created. Any re-assessment will result in the re-setting of the delivery date. It will be possible to find orders in the anticipated orders screen and amend the order priority. This will result in the delivery date being re-set to the new delivery date based upon the entered order priority.

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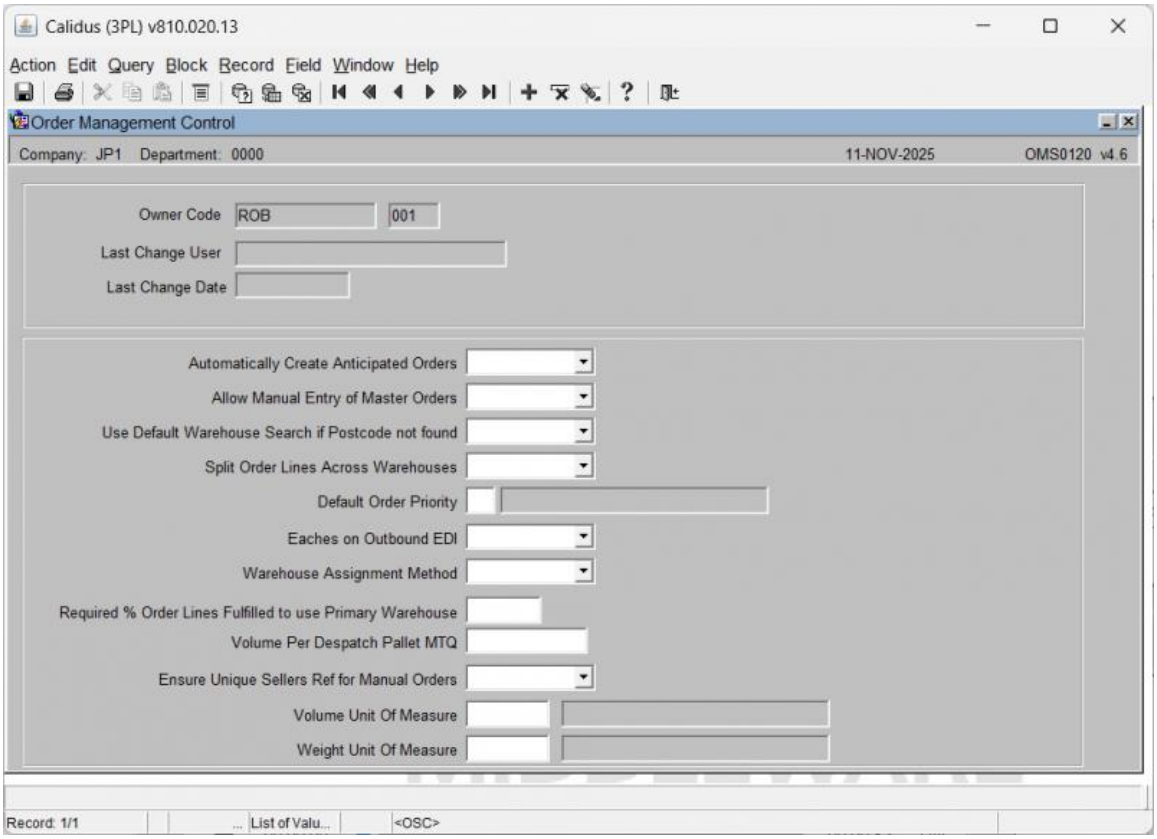
# 1 OMS0120 Order Management Control

This is the *Order Management Control* screen (*OMS0120*).




This screen is used for setting system-wide or owner-specific parameters that control order processing, warehousing assignments, and unit of measure requirements.

## 1.1 Order Management Control

This form is used for setting system parameters.

| Field Name | Full Description |
|---|---|
| *Owner Code* | enter the owner code here. It will be defaulted to your user's default owner. When a value is entered, the owner name will be displayed. |
| *Last Change User* | This is display only. |
| *Last Change Date* | This is display only. |
| *Automatically Create Anticipated Orders* | select an option from the drop-down list provided. Values:<br>• - *No*<br>• - *Yes* |
| *Allow Manual Entry of Master Orders* | select an option from the drop-down list provided. Values:<br>• - *No*<br>• - *Yes* |
| *Use Default Warehouse Search if Postcode not found* | select an option from the drop-down list provided. Values:<br>• - *No*<br>• - *Yes* |
| *Split Order Lines Across Warehouses* | select an option from the drop-down list provided. Values:<br>• - *No*<br>• - *Yes* |
| *Default Order Priority* | enter the default order priority - An LOV is provided. |



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| Field Name | Full Description |
| --- | --- |
| *Eaches on Outbound EDI* | select an option from the drop-down list provided. Values:<br>• - *No*<br>• - *Yes* |
| *Warehouse Assignment Method* | select an option from the drop-down list provided. Values:<br>• - *Customer*<br>• - *Primary*<br>• - *Normal* |
| *Required % Order Lines Fulfilled to use Primary Warehouse* | enter the required percentage of order lines that must be fulfilled to use the primary warehouse. |
| *Volume Per Despatch Pallet MTQ* | enter the volume per despatch pallet MTQ. |
| *Ensure Unique Sellers Ref for Manual Orders* | select an option from the drop-down list provided. Values:<br>• - *No*<br>• - *Yes* |
| *Volume Unit Of Measure* | enter the volume unit of measure. |
| *Weight Unit Of Measure* | enter the weight unit of measure. |



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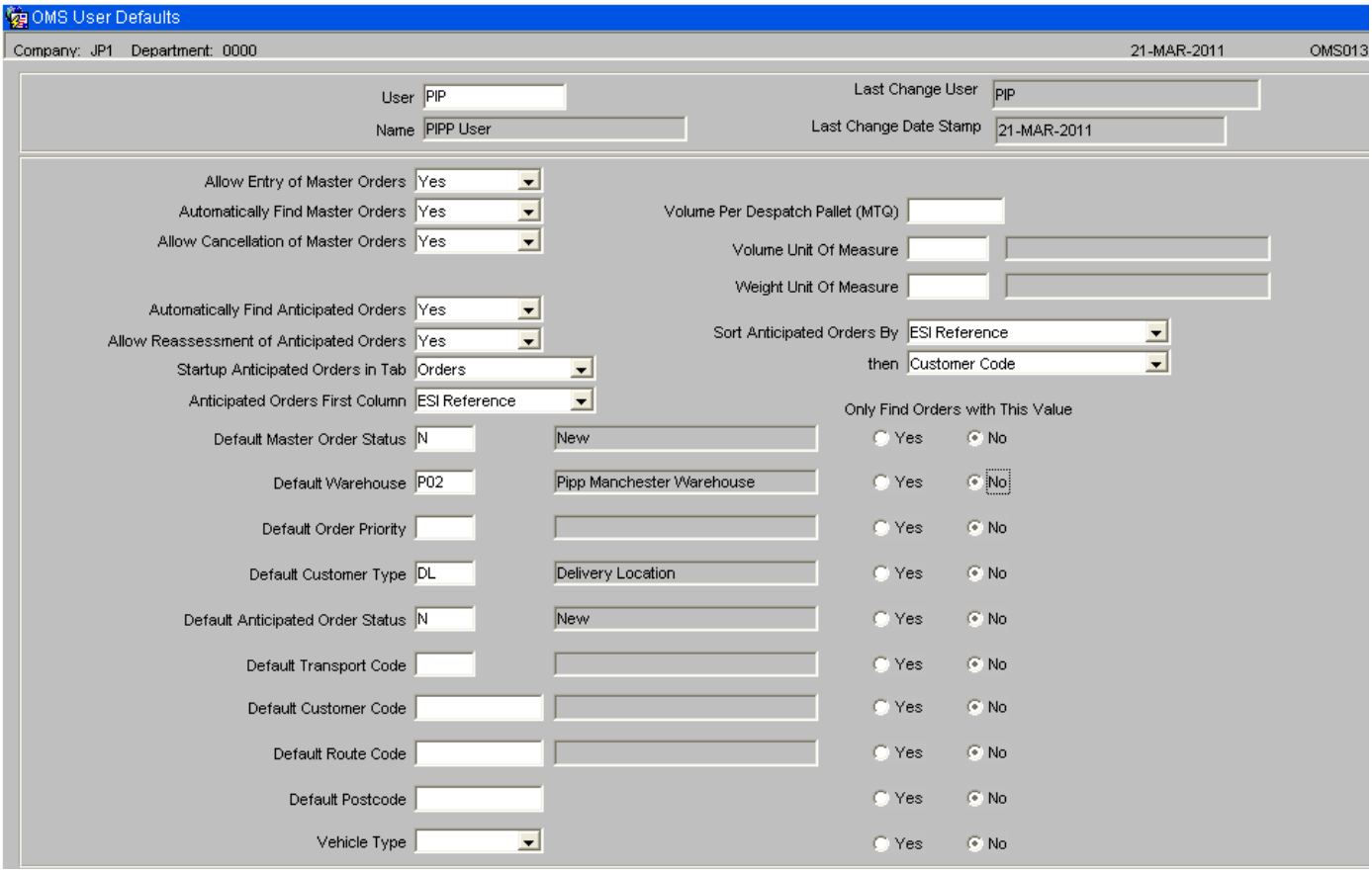
# 2 OMS0130 OMS User Defaults

A new maintenance screen will be provided to control the main functions of the Order Management System at a user level. This screen will allow each user to be set up with their preferred settings and will allow the OML software to be configured to suit each user?s requirements. Unless stated otherwise, the user?s settings will override the OMS control settings.




**Allow Entry of Master Orders Y/N.** When set to ?Y?, it will be possible to enter a master order directly in the ?Master Orders? control form. This option could be used if the EDI order files have failed to reach the server or to rapidly enter an emergency order. If **?N?** is selected then this functionality is not available for this user. NB. The ?Allow Entry of Master Orders? must be set to Y on OMS control as well as against the user . If the ?Allow Entry of Master Orders? must be set to N on OMS control then no user will be able to enter master orders regardless of the value of this flag.

**Automatically Find Master Orders Y/N.** When set to Y, instead of the master order screen starting up on the Selection Criteria tab, the user will be taken straight into the main master order tab.

**Allow Cancellation of Master Orders Y/N.** When set Y, the user will be able to click the cancel buttons in the master orders screen. If set to N, then the Cancellation buttons will be greyed out in the master order screen.

**Automatically Find Anticipated Orders Y/N.** When set to Y, instead of the anticipated order screen starting up on the Selection Criteria tab, the user will be taken straight into their preferred tab, as set up on the ?Startup Anticipated Orders in Tab? option.

**Automatically Select Anticipated Orders Y/N.** The anticipated orders have a check box next to each order. This flag controls whether this check box is checked or left blank. When set to Y, every time the user triggers a query in the anticipated orders screen, the system will automatically check the orders. This option should be used when the user is setup to retrieve a small number of records for each find. NB, Queries are triggered following any possible change to the displayed orders. For example, if an order is re-assigned to a different warehouse, then the system will re-query the data as the re-assignment may have placed the order outside the ?Selection Criteria?. The re-query of the data will reset the value of the check flag, to either blank or checked, depending upon the setting of this flag.

**Allow Re-assessment of Anticipated Orders Y/N.** This flag controls whether this user is allowed to click the ?Re-assess ALL orders at Status New? in the anticipated order screen. If this flag is set to N then the button will be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greyed out.

**Startup Tab on Anticipated Orders** This can be set to control which tab the form displays following every re-find of orders. Values are:-

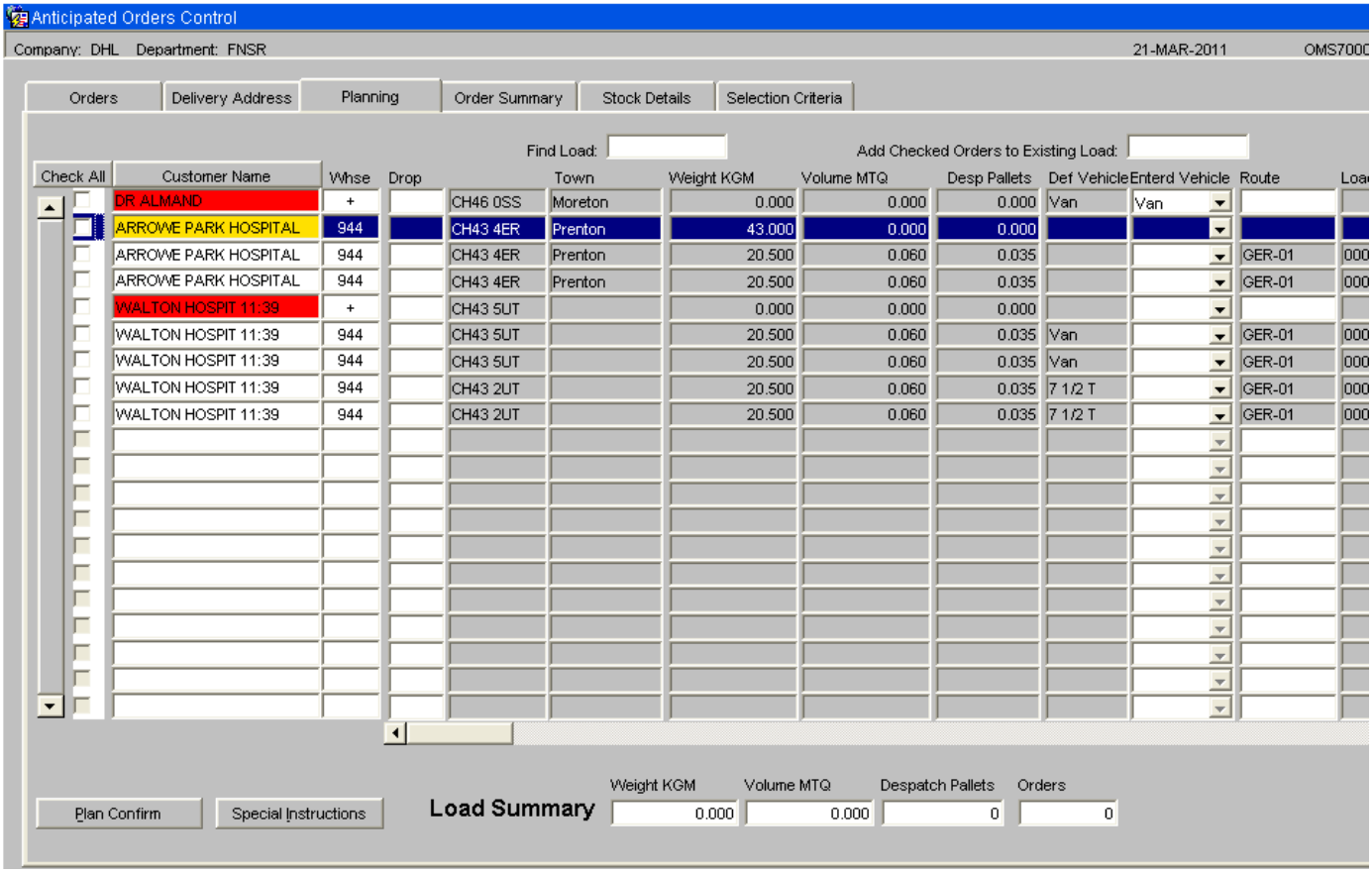
- Orders
- Order Summary
- Planning
- Delivery Address
- Stock Details

For Transport planning users this can be set to ?Planning? to run the form in ?Planning? mode.

**Anticipated Orders First Column** This can be set to control which data value is displayed in the first column on the ?Anticipated Orders? screen, Orders tab. A drop down list will be available which will allow one of the following data fields to be selected as the first column:-

- ESI reference
- Customer name
- WMS Order Number

The setting of the user?s, ?Anticipated Orders First Column?, flag will control which value will be displayed in the first column of the anticipated orders screen.




**Default Master Order Status** If this value is set, then the Status on the selection criteria tab on the master order screen, will be automatically filled in to this value.

**Default Warehouse** If this value is set, then the warehouse on the selection criteria tab on the anticipated order screen will be automatically filled in to this value.

**Default Order Priority** If this value is set, then the priority on the selection criteria tab on the anticipated order screen will be automatically filled in to this value.



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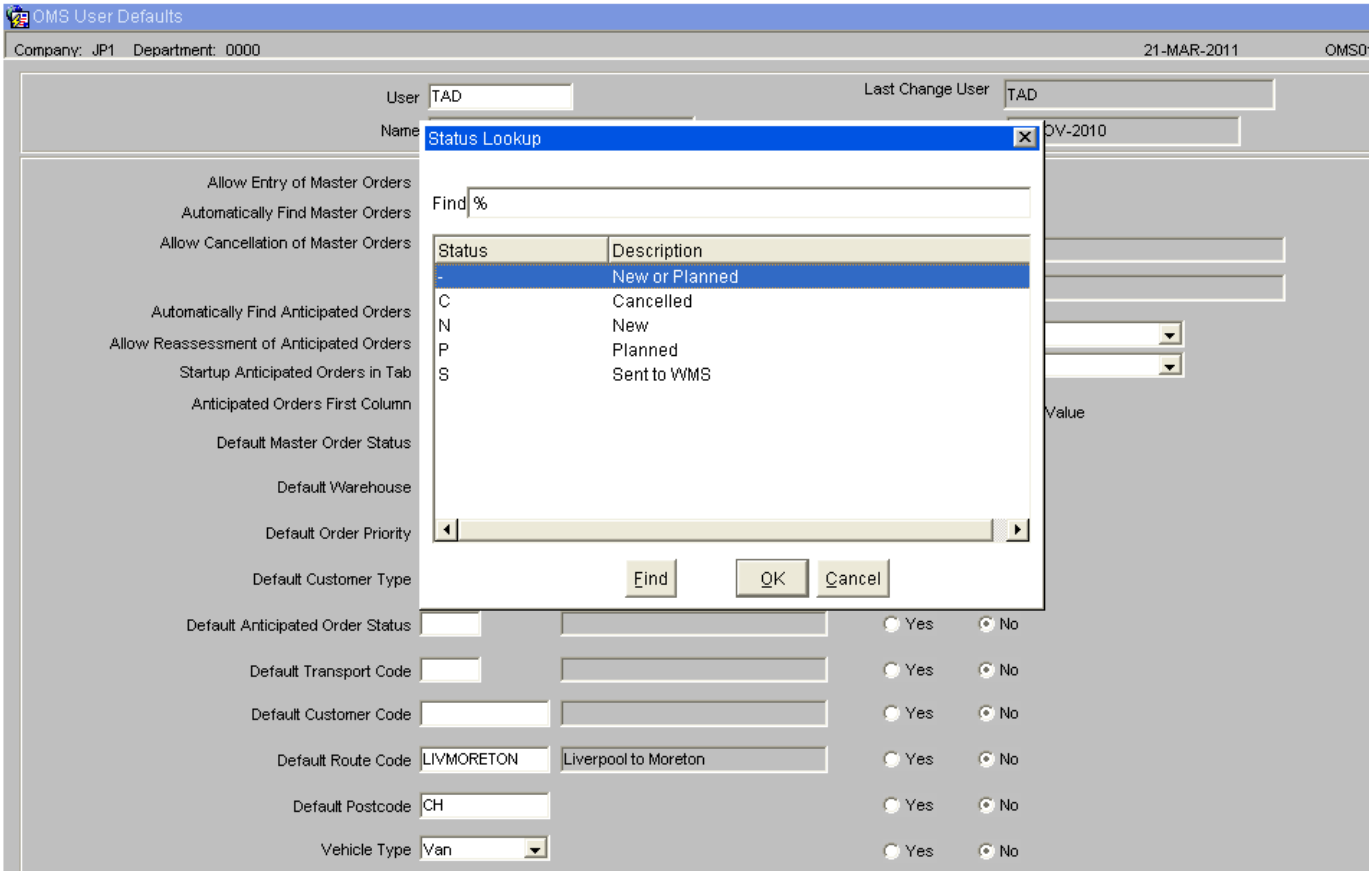
**Default Customer Type** If this value is set, then the customer type on the selection criteria tab on the anticipated order screen will be automatically filled in to this value.

**Default Anticipated Order Status** If this value is set, then the status on the selection criteria tab on the anticipated order screen will be automatically filled in to this value. Allowed values are:-




**Default Transport Code** If this value is set, then the transport code on the selection criteria tab on the anticipated order screen will be automatically filled in to this value.

**Default Customer Code** If this value is set, then the customer code on the selection criteria tab on the anticipated order screen will be automatically filled in to this value.

**Default Route Code** If this value is set, then the route code on the selection criteria tab on the anticipated order screen will be automatically filled in to this value.

**Default Postcode** If this value is set, then the postcode on the selection criteria tab on the anticipated order screen will be automatically filled in to this value. The start of a postcode can be entered e.g. CH to find all orders for postcodes beginning with CH.

**Default Vehicle Type** If this value is set, then the Vehicle Type on the selection criteria tab on the anticipated order screen will be automatically filled in to this value.

**Radio Buttons - ?Only this Value?** A radio button titled ?Only this value? will be included next to each of the default search values. If this button is clicked to the Yes position, then the user will only be able to find orders for their default setting. This will allow certain users a restricted view of the anticipated orders while other users can change the selection criteria to view all orders.

**Volume Per Despatch Pallet MTQ** This value stores the volume of the despatch pallet. This value will be used in the OML to calculate the number of pallets required. If this value is blank or zero then the OML will use the volume per despatch pallet set up on OMS Control.

**Volume Unit Of Measure** This value controls the Unit Of measure used in the OML to display the volume. If this value is blank then the OML will use the ?Volume Unit of Measure? set up on OMS Control.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**Weight Unit Of Measure** This value controls the Unit Of measure used in the OML to display the weight. If this value is blank then the OML will use the ?Weight Unit of Measure? set up on OMS Control.

**Sort Anticipated Orders By** The two sort fields control how the anticipated orders are sorted. The following sort options are available. NB. The sort field names are the actual names of the database columns rather than a column description.

- Warehouse_id - The warehouse assigned to the anticipated order.
- WMS_Order_num - The warehouse order number.
- Order_description - The ESI order reference.
- Status - The status of the anticipated order. (N - New, P - Planned or S - Sent to WMS).
- Cust_code - The customer code.
- Oh_Seq_no - The system generated sequence number for each anticipated order. This sort option will return the anticipated orders in the sequence in which they were generated.
- Order_priority - The priority of the order.
- Delivery_date - The delivery date is evaluated as the ?Entered Delivery Date?, if a ?Entered Delivery Date? has been entered against the order. If a ?Entered delivery date? has not been entered the delivery date will be set to the ?Default Delivery date?.
- Default Delivery Date - The default delivery date. This is the delivery date based on the order priority.
- Planned Delivery Date - The entered delivery date. This date can be entered against an anticipated order to override the ?Default delivery date?.
- Transport Code - Also known as the carrier code.
- Create_date_stamp - The date the anticipated order was created.
- Create_user - the user id of the user who created the anticipated orders.
- Change_date_stamp - The date of the last change to the anticipated order.
- Change_user - The user id of the user who last changed the order.
- Weight - The weight of the order.
- Volume - The volume of the order. NB. The pallets are calculated using the volume. Sorting by this option is equivalent to sorting by the number of pallets.
- Route_code - The route code assigned to the order.
- Load_number - The load number assigned to the order.
- Drop_seq - The drop sequence that has been entered against each order.
- Marshall_loc - The marshal location assigned to the order.
- Load_date - The load date assigned to the order. The load date field includes the load time.
- Postcode - The postcode of the customer?s delivery address.
- Town - The town of the customer?s delivery address.

If the sort options are left blank, the orders will be sorted by the ESI order reference (order_description) then by the warehouse id.