

The pick wave maintenance screen allows the user to ?group? orders together as a route load. The various selection criteria you see here (Order status, order priority, product type etc) are mandatory determined by whether the owner rules - PW01-PW13 are set.

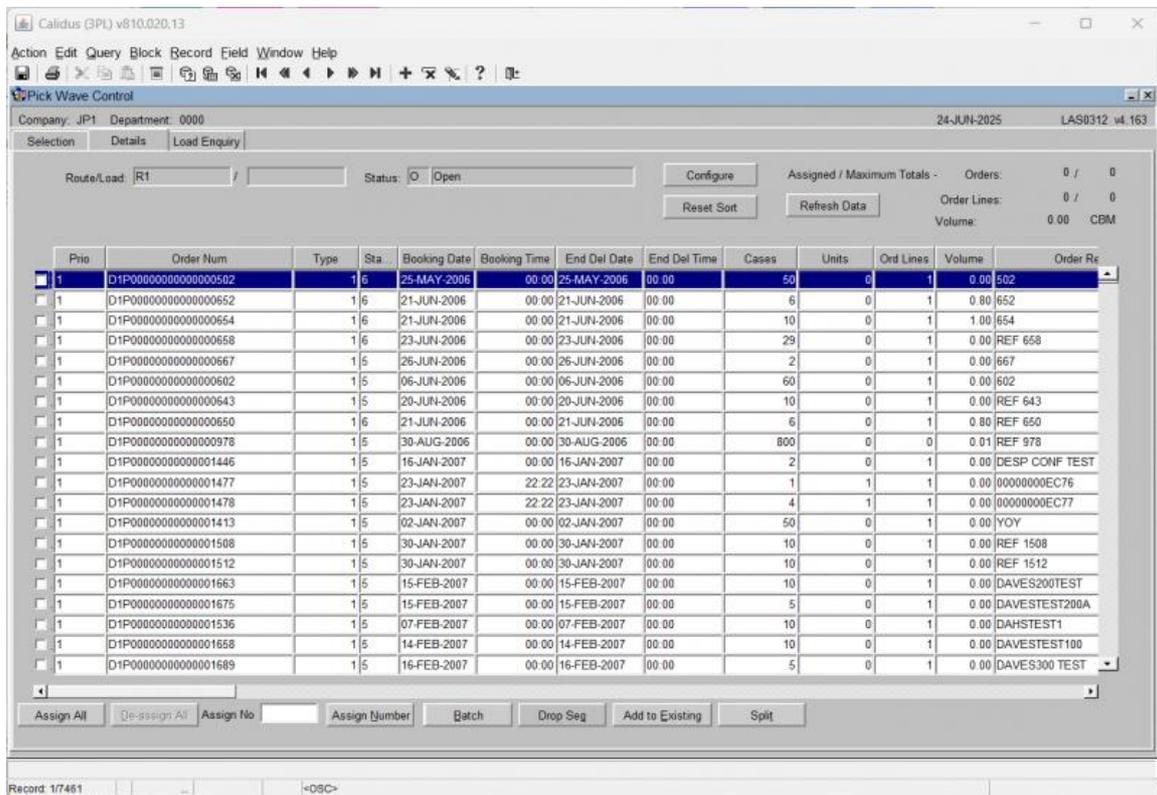
Selection Tab

Field Name	Description	Options
<i>Route/Load or Order Number</i>	A selection of whether to find routes/loads/orders and in what way. By selecting Route/orders, you can create new loads from this screen.	Select from the DDL provided - <i>Route/Load or Order Number</i>
<i>Route **</i>	The route code the orders will be assigned to.	The route code must exist in route codes maintenance. This is always required, even when entering by Order Number. An LOV is available.
<i>Load Date</i>	The date of the load that was generated	Only enabled when selecting by <i>Route/Load</i> .
<i>Load Status</i>	The status of the load generated	Select from the DDL provided: <i>All, Despatched, Open, Being Picked, Pick Confirmed</i> . Only enabled when selecting by <i>Route/Load</i> .
<i>Load</i>	The unique load number	If one is not entered, a new load will be generated. The load number will be automatically generated once orders have been assigned to the route. If selected, then an LOV is available to select any existing load numbers.
<i>TMS Trip ID</i>	If CTMS is being used, then the TMS trip ID can be provided here instead of the load number.	Only enabled when selecting by <i>Route/Load</i> .
<i>Owner **</i>	The owner code of the orders	Must exist in owner maintenance - if owner prompt maintenance default is set to ?N? you may use any owner set up against your login id
<i>Order Status</i>	Allows the user to select orders based on the order status - I.e. all orders not yet allocated = status	Must be a valid order status
<i>Order Priority</i>	Allows the user to select orders based on the order priority	Must have been created in order priority maintenance - LOV available
<i>Product Type</i>	Allows the user to select orders based on the product type within each order detail	A pop-up window will show all of the product types.

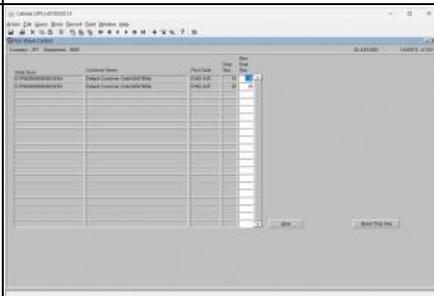
Field Name	Description	Options
		These must have been created in product types maintenance Tick boxess are provided to select multiple product types
<i>Order No. From / To</i>	Allows the user to select orders within an order number range	An LOV is available
<i>Depot Code</i>	The Depot Code of the Order, and he description if selected	An LOV is available
<i>Area Code</i>	Area code for where the stock is to be picked from, and the area description if selected.	Only valid for orders which are at status 4 allocated, and will have a location code to pick the stock from. Used to aid with picking efficiency An LOV is available
<i>Booking Date</i>	The booking date of the order	Display only, note, the orders will be sequenced by booking date then order number order
<i>Shipment id</i>	Shipment id of the order	Free text field
<i>Customer Ref</i>	Allows the user to select orders on the customer reference field	-
<i>Address Line 1</i>	Allows the user to select orders on the address line of the customers address	-
<i>Country</i>	Country Code	LOV on valid country codes
<i>Carrier Code</i>	Allows the user to select orders on the carrier code of the order entered in order maintenance	Must have been created in carrier codes maintenance - LOV available
<i>Routing Code</i>	Allows the user to select orders on the routing code entered in order maintenance	Must have been created in routing codes maintenance - LOV available
<i>Customer Code</i>	Allows the user to select orders on the customer code of the order entered in order maintenance.	An LOV is available.
<i>Request Type</i>	Allows the user to select orders on the select type entered in order maintenance	Must have been created in select types maintenance - LOV available
<i>Order Lines Filter</i>	Selection criteria for single or multiple line orders to aid with picking speeds	Select from the DDL provided: <ul style="list-style-type: none"> • <i>No Filter by Lines</i> • <i>Single Line Orders</i> • <i>Multiple Line Orders Only</i> • <i>Multiple Line Single Product Type</i> • <i>Multiple Line an Product Types</i>
<i>Pick By Date</i>	The Pick By Date on the order header.	Valid date
<i>End Delivery Date</i>	The End Delivery Date on the order header	Valid date
<i>Channel</i>		
<i>No of Areas</i>		
<i>Order Stock Type</i>		Select from the DDL provided: <ul style="list-style-type: none"> • <i>Select Any Order</i> • <i>Unit Pick (Whole Orders)</i> • <i>Case Picks (Whole Orders)</i> • <i>Mixed Orders (Whole Orders)</i> • <i>Case Picks (Product Type)</i> • <i>Unit Picks (Product Type)</i> • <i>Mixed Orders (Product Type)</i>
<i>Reject orders that require replenishments</i>		Select from options Yes or No (the default
Buttons	Description	Options
Find	This button starts the process of finding the orders based on the selection criteria entered	-

Once found, the loads and orders matching the selection criteria are displayed in the *Details* tab.

Details Tab



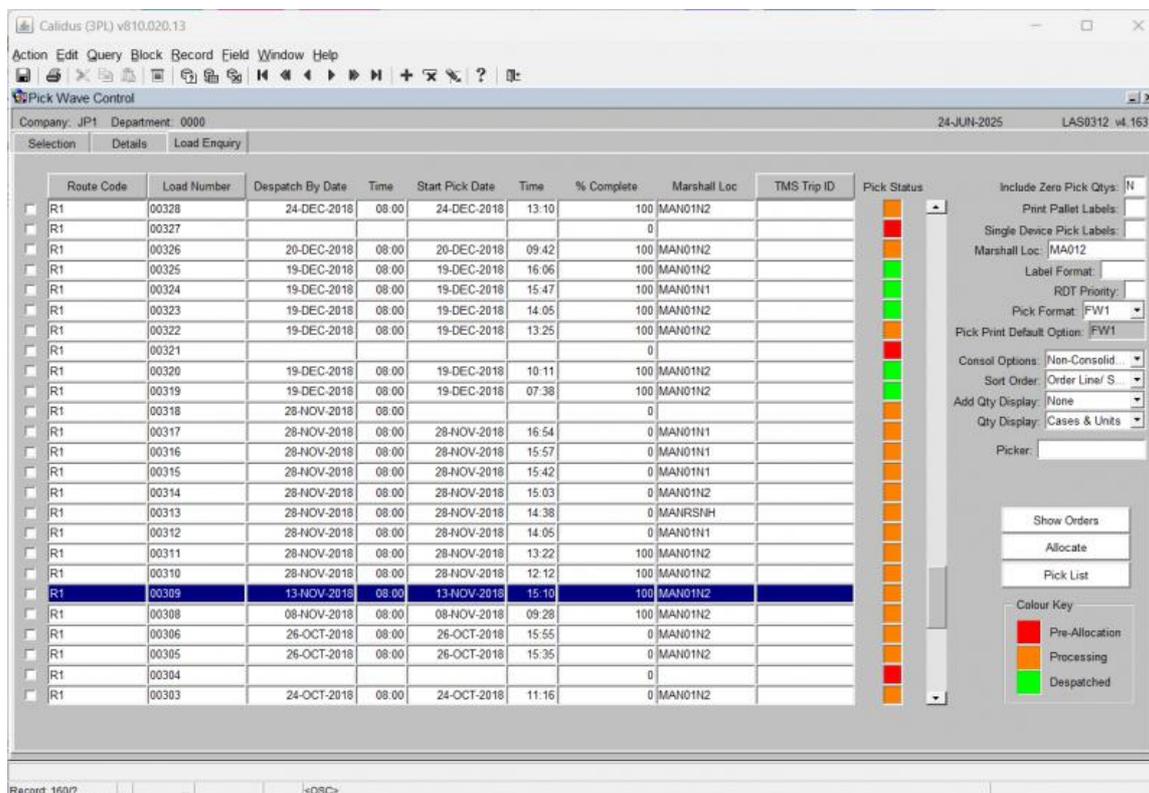
 **Note:** By clicking on the buttons above the columns it is possible to re-sort the data to improve the order display and to aid with selection.

Display Values	Description	Options
<i>Assigned/maximum totals</i>	This field will display how many order lines have been assigned so far out of the maximum allowed	Display only, the maximum orders and order line levels are set in Owner Maintenance, Sales Order Tab
<i>Orders</i>	The total number of orders allowed for a route load	Display only
<i>Ord Lines</i>	The total number of order lines for that order	Display only
Buttons	Description	Options
Configure	To allow the screen to be configured to a specific operation or user	This will display the Program Layout Configuration screen WHS0909 , where you can select the columns displayed in this form.
Reset Sort	Will reset the sort sequence to the values that were originally returned	
Refresh Data	Requery the orders and loads again using the existing criteria entered in the <i>Selection</i> tab.	
Assign All	Allows the user to assign all orders selected to the route load	
Deassign All	Allows the user to de-assign all orders selected from the route load	
Assign Number	Will create a Pick Wave with the number of orders entered in the Assign Number field	
Batch	Will create multiple Pick Waves, each pick wave will have the number of orders entered in the Assign Number field	If there are a 100 orders displayed from the original selection criteria, if you then enter 10 into the Assign Number field and select Assign Batch, then ten Pick Waves will be created each with 10 orders.
Drop Seq	Allows you to modify the drop sequence within the selected load. A new window will open showing the orders in the load, which may then be modified through the entry of the new sequence column. You can then save your changes with the Save button, or reset to the pre-existing sequence. Saving will return you to the <i>Details</i> tab.	

Buttons	Description	Options
Add to Existing	Allows the user to move orders to existing route loads as long as the status matches	-
Send to Allocation	Enables the user to allocate the orders selected	This option will only be enabled if the orders selected are at status ?1?
Split	Split selected orders from an existing load.	

Load Enquiry Tab

This allows you to see loads that have already been created, and manage them.



Field Name	Description	Options
<i>Route Code</i>	The Route Code	
<i>Load Number</i>	The load number	
<i>Despatch By Date/Time</i>	When the orders on this pick wave are expected to be despatched.	
<i>Start Pick Date/Time</i>	When the orders on this pick wave are expected to start picking	
<i>% Complete</i>	The percentage complete of all of the lines/pages on the pick wave.	
<i>Marshall Loc</i>	The assigned marshalling location	
<i>TMS Trip ID</i>	The TMS Trip ID (if CTMS is in use).	
<i>Pick Status</i>	A RAG column showing the basic status of the processing of the pick wave. The key is displayed on the bottom right of the form.	

You have the facility to action the existing loads here.

Button Name	Description
Show Orders	Show all orders on this load in the Details tab of the form
Allocate	Allocate the selected load(s) using the options specified (see below)
Pick List	Pick List the load(s) specified.

The options required for allocation and pick listing are generally defaulted from settings, but must be entered.

Field Name	Description	Options
<i>Include Zero Pick Qty's</i>	Whether zero pick lines are to be included on the pick note	Yes/No
<i>Print Pallet Labels</i>	Are pallet labels to be produced	Yes/No, default is taken from Owner Maintenance / Format tab
<i>Single Device Pick</i>	Whether a single device is used for all labels	Yes/No

Field Name	Description	Options
<i>Labels</i>		
<i>Marshall Loc</i>	The marshalling location the order or route load is to be picked to	Mandatory field, can be defaulted in (Location set in System Parameters or Owner Ware Parameters) or can be selected from a LOV. Must be a valid Marshalling Location
<i>Label Format</i>	If picking labels are required, enter the picking label format here.	
<i>Pick Format</i>	What pick list format is to be used.	Select from the DDL provided.
<i>Pick Print Default Option</i>	The default pick list format for this owner.	Display Only
<i>Consol Options</i>	Whether and how to consolidate pick lines into picked pallets.	Select from the DDL Provided: <ul style="list-style-type: none"> • <i>Non-Consolidated</i> (the default) • <i>Consolidated</i> Select from the DDL provided: <ul style="list-style-type: none"> • <i>Order Line/System Rotation/Pallet ID</i> • <i>Product Type/Stock Code/System Rotation/Pallet ID</i> • <i>Aisle Seq/Pick Seq/Order Line/System Rotation/Pallet ID</i> • <i>Aisle Seq/Pick Seq/Product Type/Stock Code/System Rotation/Pallet ID</i>
<i>Sort Order</i>	How the orders are sorted.	Select from the DDL provided: <ul style="list-style-type: none"> • <i>None</i> (the default) • <i>Volume and Weight (Net)</i> • <i>Volume and Weight (Gross)</i>
<i>Add Qty Display</i>	Whether and how additional quantities are displayed	Select from the DDL provided: <ul style="list-style-type: none"> • <i>Cases & Units</i> • <i>Unit Equivalent Quantity</i>
<i>Qty Display</i>	How pick quantities are displayed.	
<i>Picker</i>	If the WCS system is enabled for this warehouse, the Picker will be able to be entered here, allocating these pick tasks directly to that picker.	An LOV is available.

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- **Order Completed:** Executes the finalization and completion of the order entry process.



2 Category:OMS



3 OMS1520 Pick and Load Planning Schedule Report

This is the *Pick and Load Planning Schedule Report* screen (OMS1520).

The following fields document the report parameters:

Field Name	Description
<i>Warehouse</i>	The unique code and name of the warehouse to be included in the report.
<i>Load Date</i>	The specific calendar date for which the loading schedule is required.

Action Buttons:

- **Report:** Executes the generation of the Pick and Load Planning Schedule Report.



4 OMS1800 Loading Report

This is the *Loading Report* screen (*OMS1800*).

The following fields document the report parameters for filtering loading data:

Field Name	Description
<i>Warehouse</i>	The unique code and name of the warehouse to report on.
<i>Load Number From</i>	The starting load number for the report range.
<i>To</i>	The ending load number for the report range.
<i>Route Code</i>	The specific route identifier to filter the report.
<i>Load Date</i>	The calendar date for which the loading activities should be included.
<i>Marshall Loc</i>	The marshalling location identifier to filter the report.
<i>Order Number From</i>	The starting order number for the report range.
<i>To</i>	The ending order number for the report range.

Action Buttons:

- **Print Loading Report:** Executes the generation and printing of the Loading Report based on the specified parameters.



5 OMS7000 Anticipated Orders Control

5.1 Anticipated Orders - Selection Criteria

If the user is not setup to automatically find anticipated orders, then the anticipated order screen will start on the selection criteria tab. If the user has a default values setup on ?OMS Users? then these will be used to automatically populate the matching fields. If the user is setup, on ?OMS users?, to only find orders with a certain default value, then these fields will be grey and the user will not be able re-enter these values on this form.

Following entry of the selection criteria, the ?Find Orders? button can be clicked to display the anticipated orders that match the criteria.

The screenshot displays the 'Anticipated Orders Control' interface. At the top, it shows 'Company: DHL' and 'Department: FNSR'. The date is '01-APR-2011' and the system is 'OMS7000'. The interface has several tabs: 'Orders', 'Delivery Address', 'Planning', 'Order Summary', 'Stock Details', and 'Selection Criteria'. The 'Selection Criteria' tab is active, showing a form with the following fields:

- ESI Reference: [Text Field]
- DH Order No: [Text Field]
- Priority: [Text Field]
- Status: [Text Field]
- Customer Type: [Text Field]
- Customer: [Text Field]
- Generic Sku / Stock Code: [Text Field]
- Transport: [Text Field]
- Postcode: [Text Field] (First part of postcode can be entered)
- Town: [Text Field] (First part of town can be entered)
- Warehouse: [Text Field]
- Delivery Date: [Text Field]
- Vehicle Type: [Dropdown Menu]
- Load Date: [Text Field]
- Route: [Text Field]
- Load: [Text Field]
- Volume per Despatch Pallet MTQ: [Text Field] (Value: 1.700)
- Volume Unit of Measure: [Text Field] (Value: MTQ) [Text Field] (Value: Cubic Metres)
- Weight Unit of Measure: [Text Field] (Value: KGM) [Text Field] (Value: Kilograms)
- Sort Orders By: [Dropdown Menu] (Value: Town)
- then: [Dropdown Menu] (Value: Warehouse)

There are two main buttons: 'Clear All Selection Criteria' and 'Find Orders'.

The Volume and Weight fields will be populated by the values set up for the user. If the user does not have these details set then the values set up on the ?OMS Control? screen will be used. These default values can be overridden.

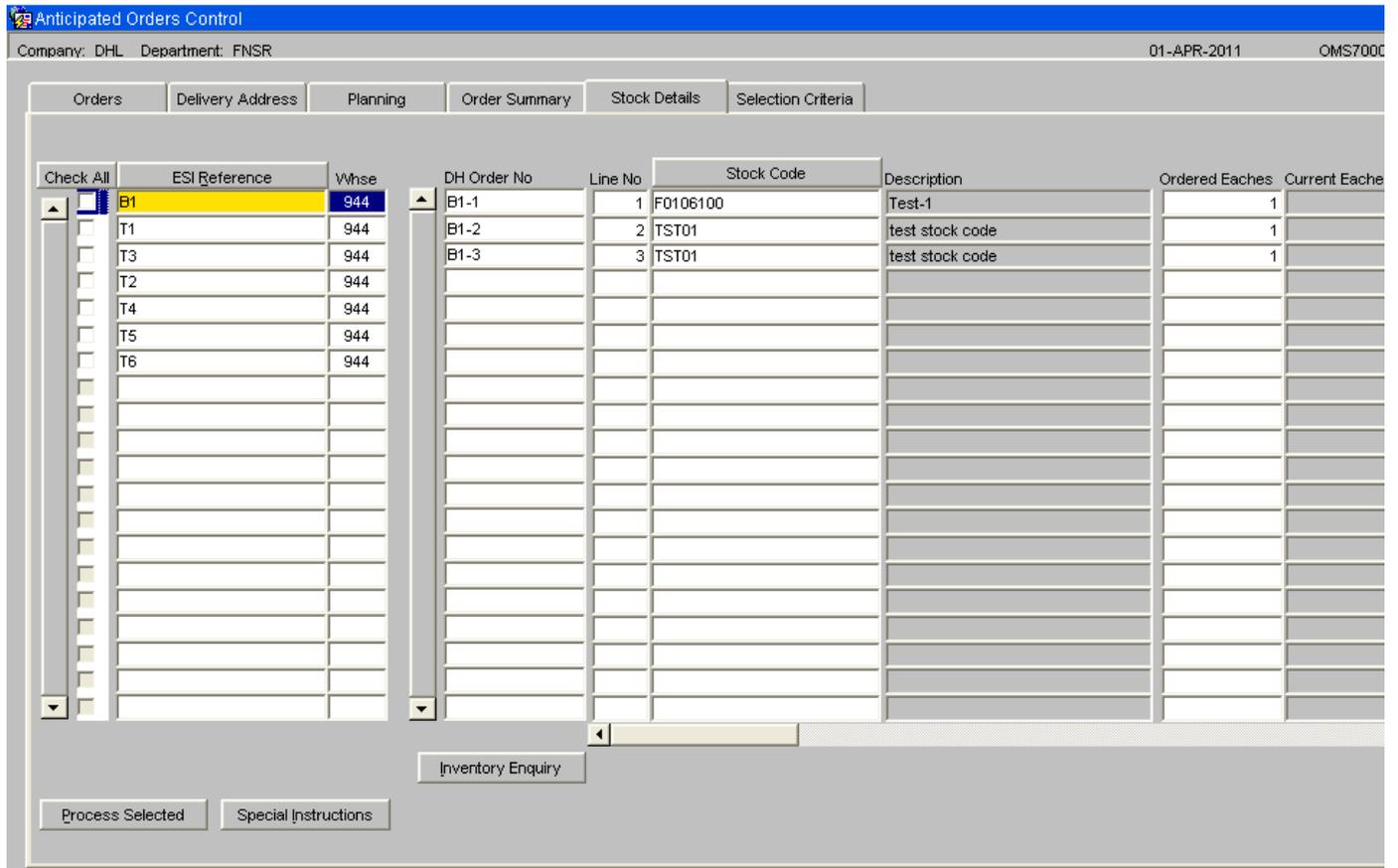
The delivery date field can be used to search for a specific delivery date. The delivery date is defined as the ?Entered Delivery Date?, if a date has been entered or the ?Default Delivery Date?, if the ?Entered Delivery Date? is blank. It will be possible to enter ?+1? to search for orders due for delivery tomorrow. ?+0? for today?s date. ?-1? for yesterday?s date. The ?Clear All Selection Criteria? button can be used to blank out the entered details.

When the ?Find Orders button? is pressed, orders matching the selection criteria will be found and displayed. If no selection criteria are entered then all the orders will be displayed.

It will be possible to enter the first part of the postcode rather than the whole postcode

When searching for a ?Line Ref? (DH order number), the system will display the order header containing a line for the entered ?Line Ref?. It will be possible to then click the ?**Stock Details**? tab. ALL lines for the order header will be displayed. The entered ?Line Ref? will be highlighted in green to distinguish it from the other order lines, as shown below.





Similarly, when searching for a stock code, the system will display all order headers containing a line for the entered stock code. It will be possible to then click the ?Stock Details? tab. ALL lines for the order header will be displayed. The entered stock code will be highlighted in green to distinguish it from the other order lines. The system will check both the Generic Sku and the NPC code when searching by stock code.

5.1.1 Anticipated Orders - Orders

This screen (OMS7000) will show the anticipated orders. If the user is set up with the ?Automatically Select Anticipated Orders? flag set to Y then the check box, at the start of the line, will be automatically checked.



scrollbar used to move to the far right of the delivery details. The ?Display Full Current Warehouse Search List for this Postcode and Customer Type? button can be clicked to view the default warehouse search sequence. The warehouse assigned to the order will be highlighted in amber.

NB. An order that has used the new warehouse assignment method will show the order from the primary warehouse as light green. The remaining lines may have been assigned to a non-primary warehouse. These remaining lines will show as amber.

5.1.2.1 Anticipated Order Status

New - Newly created anticipated orders will have a status of New. The orders can be assigned to a new warehouse while they are at this status. If the ?Re-assign ALL Orders? button is clicked then all anticipated orders with a status of New will be cleared down and recreated.

Planned - The planned status will only allow limited changes. Order must be at this status before they can be sent to the warehouse.

Sent To WMS - Orders that have been sent to the warehouse for allocation, picking and despatch.

NB. The anticipated order status does not get updated following each change of warehouse order status. The screen links to the warehouse order to find the status to display the warehouse order status. For this reason, the displayed status may be 6 - Pick confirmed but it is not possible to search for orders at status 6 as the anticipated order status is S - Sent to warehouse.

Buttons

Uncheck / Check All This button can be used to Check or uncheck all the orders.

ESI Reference / Address Name / WMS Order No This button can be used to toggle the display between the ESI order reference, the delivery address name and the WMS order number. If the order has not yet been sent to the warehouse then the WMS Order No will be shown as blank.

Process Selected It is possible to select certain orders using the check box on the left hand side of the screen. The ?Process Selected? button opens a new window to allow an action to be specified and performed on the selected orders.

Orders Enquiry. This button will be enabled for orders that have been sent to the warehouse. It will call the standard warehouse order enquiry.

Check for Cancelled WMS Orders This button will call the database package that reads through the WMS Orders looking for any orders that have been cancelled. When this button is clicked, the system will check the warehouse orders for any cancelled order lines. When orders are cancelled using the ?Manual Order Cancellation? screen, the orders may have been allocated or pick confirmed. This process will include ALL cancelled orders. NB. Despatch confirmed orders cannot be cancelled.

A single order line for a generic sku may result in several warehouse orders lines when more than 1 NPC is required to satisfy the order line. A warehouse order line will only be considered cancelled when ALL the NPC warehouse order lines relating to a DH order line, are cancelled.

NB. A short pick or a pick confirm to zero will not be classed as a cancelled order. Orders that are short picked or pick confirmed to zero will be despatch confirmed. The EDI despatch confirmation message will go back to DH showing the quantity despatched.

This ?Check for Cancelled WMS Orders? process will also be run when the ?Re-assess all orders at status new? button is clicked.

Reassess ALL Orders at Status New This button will call the database package that creates the anticipated orders. All anticipated orders at status new will be deleted and then recreated using the current stock levels and warehouse availability when deciding which warehouse and NPC code to use to satisfy the order. As anticipated orders are deleted and then re-created, if changes have been made such as entering delivery dates or changing order priority, then these changes will be lost.

The ?Reassess ALL Orders at Status New? button will give a warning message prior to running this process. The user will be asked:



?Warning. This process will recreate orders at status ?New?. If changes have been made to over-ride the default settings then these changes will be lost. Do you want to continue??

If the No button is clicked then the process will not be run.

Send Checked Orders to Warehouse. This will run the database package, which converts anticipated orders to committed warehouse orders. Orders must show a status of ?New; or ?Planned? to be sent to the warehouse for allocation. This button should only be used to send individual orders to the warehouse. The Planning tab will be used to send a whole planned load of orders to the warehouse. If an order is at a planned status with a route and load number assigned then it will be removed from the load prior to sending it to the warehouse.

5.1.3 Anticipated Orders - Process Selected

The Process Selected button will display a new screen where the user can select what they wish to do with the selected orders.

Orders that have been sent to the warehouse will **NOT** be updated by this process.

5.1.3.1 Warehouse Change or Re-select

The Change Warehouse options are:-

- **Over-ride Default Warehouse Search** - If this option is chosen, the user can specify a new warehouse search sequence. When the confirm button is clicked the new warehouse search sequence will be used to recreate the anticipated orders.
- **Default** - Use Postcode to assign warehouse. This option can be used to re-assess the selected orders and assign the most appropriate warehouse based on the current settings and stock levels. This option can be used when a warehouse status has changed or stock levels have changed.
- **Primary Warehouse Only** - This option can be used to only select the primary warehouse when creating anticipated orders.



The selected orders must be at status ?New? for this change to be allowed. Orders at status Planned will be ignored.

5.1.3.2 Change Route / Delivery Date

Update Route / Delivery Date This option will only process orders at a status of New. Orders at status planned or sent to warehouse will be ignored.

If this option is selected then the user will be prompted to enter a route code and delivery date. When the confirm button is clicked, the selected orders will be updated with the entered route code and delivery date, providing the selected order has a status of New.

5.1.3.3 Reset Planned Orders to Status New

Reset Selected Planned Orders to Status New This option can be used to reset the selected planned orders to a status of New. This option can only be used to change orders with a status of Planned to Status New. Orders sent to the warehouse will be ignored.

It is possible to enter a delivery date. The selected orders will have this new delivery date entered against them when the orders change to a status of New.

The following fields will be re-set as the order is no longer considered planned.

- Marshalling Location - set to blank
- Load Date - set to blank
- Load Time - set to blank
- Load Number - set to blank
- Drop Sequence - set to blank
- Default Vehicle type - set to the default vehicle type for the customer type
- Entered vehicle type - set to blank
- The postcode stamped against the anticipated order will be reset to the customer?s current postcode.
- The town stamped against the anticipated order will be reset to the customer?s current town.
- Route code - The system will find the route code setup for the customer?s delivery address. The system will then check if this route code is a valid route for the warehouse that the order is assigned to. If the route is valid then this route code will be assigned to the order. If the route is not a valid route code for the warehouse assigned to the order then the route code cannot be set to the customer?s default resulting in a blank route code.

(NB. Once orders have been sent to the warehouse there is a new Order Cancellation Screen to cancel the selected orders and deallocate stock - Change request NH-7X9CN7).

There is no option to cancel an anticipated order. Instead, the master order can be cancelled which will delete the associated anticipated order.

5.1.4 Anticipated Orders - Delivery Address

This screen (OMS7000) will show the anticipated orders when the delivery address tab is clicked, the address lines will be shown on the right side of the screen.



Anticipated Orders Control

Company: JP1 Department: 0000 15-APR-2011 OMS7000

Orders Delivery Address Planning Order Summary Stock Details Selection Criteria

Check All	ESI Reference	Whse	Postcode	Delivery Address
<input type="checkbox"/>	FRI20	COV	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB
<input type="checkbox"/>	FRI2001_1	BAW	CH46 6AF	Moreton Surgery Pasture Road Moreton GB
<input type="checkbox"/>	FRI5	COV	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB
<input type="checkbox"/>	FRI7	COV	AL3 9RT	Alton Surgery 40 Alton Road A234567890B234567890C234567890D23456789Z GB
<input type="checkbox"/>	H1	COV	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB
<input type="checkbox"/>	HAT3	BAW	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB
<input type="checkbox"/>	H_ARR_1	COV	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB
<input type="checkbox"/>	H_CLAT_3	COV	CH64 1TT	Clatterbridge Hospital Clatterbridge Roundabout Brimstage Road Clatterbridge GB
<input type="checkbox"/>	I1	COV	BAW1 1TT	Bawtry Surgery 12 High Street Main shopping area GB
<input type="checkbox"/>	I2	COV	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB
<input type="checkbox"/>	I3	COV	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB
<input type="checkbox"/>	I4	COV	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB
<input type="checkbox"/>	L1	COV	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB
<input type="checkbox"/>	L8-1	COV	CH43 9TL	Prenton Surgery 135 Woodchurch Road L2 Prenton GB
<input type="checkbox"/>	L8-2	COV	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB
<input type="checkbox"/>	L8-3	COV	CH43 9TL	Prenton Surgery 135 Woodchurch Road L2 Prenton GB
<input type="checkbox"/>	L8-4	COV	CH43 9TL	Prenton Surgery 135 Woodchurch Road L2 Prenton GB
<input type="checkbox"/>	L8-5	COV	CH42 9GW	Oxton Surgery 10 Christchurch Road Oxton Village Prenton GB
<input type="checkbox"/>	L8-6	COV	BR11 3ER	Birmingham Central Hospital City Centre Ring Road Birmingham GB
<input type="checkbox"/>	L8-7	COV	CH43 9XX	WirralPCT Arrowe Park Hospital Arrowe Park Woodchurch Road Upton Village GB

Process Selected Special Instructions

The scrollbar at the bottom of the screen can be used to display the warehouse search sequence for the postcode.

Anticipated Orders Control

Company: JP1 Department: 0000 15-APR-2011 OMS7000

Orders Delivery Address Planning Order Summary Stock Details Selection Criteria

Display Full Current Warehouse Search List for this Postcode and Customer Type

Check All	ESI Reference	Whse	1	2	3	4	5	6	7	8	9	10	Postcode Part Used	Type	D
<input type="checkbox"/>	L1	COV	BAW										CH43	DL	
<input type="checkbox"/>	L8-1	COV	BAW										CH	CP	
<input type="checkbox"/>	L8-2	COV	BAW										CH43	DL	
<input type="checkbox"/>	L8-3	COV	BAW										CH	CP	
<input type="checkbox"/>	L8-4	COV	BAW										CH	CP	
<input type="checkbox"/>	L8-5	COV	BAW										CH	CP	
<input type="checkbox"/>	L8-6	COV	COV										Default Search	DL	
<input type="checkbox"/>	L8-7	COV	BAW										CH43	DL	
<input type="checkbox"/>	MAST1	COV	COV										Default Search	DL	
<input type="checkbox"/>	MAST2	COV	COV										Default Search	DL	
<input type="checkbox"/>	MAST3	COV	COV										Default Search	DL	
<input type="checkbox"/>	MAST4	COV	BAW										CH43	DL	
<input type="checkbox"/>	MAST5	COV	BAW										CH43	DL	
<input type="checkbox"/>	MAST6	COV	BAW										CH43	DL	
<input type="checkbox"/>	MON1001_1	LIV	BAW										CH	CP	
<input type="checkbox"/>	MON1001_2	COV	BAW										CH	CP	
<input type="checkbox"/>	MON1001_3	LIV	BAW										CH	CP	
<input type="checkbox"/>	MON1001_4	COV	BAW										CH	CP	
<input type="checkbox"/>	MONDAY 25	LIV	BAW										CH	CP	
<input type="checkbox"/>	MONDAY01	LIV	BAW										CH	CP	

Process Selected Special Instructions

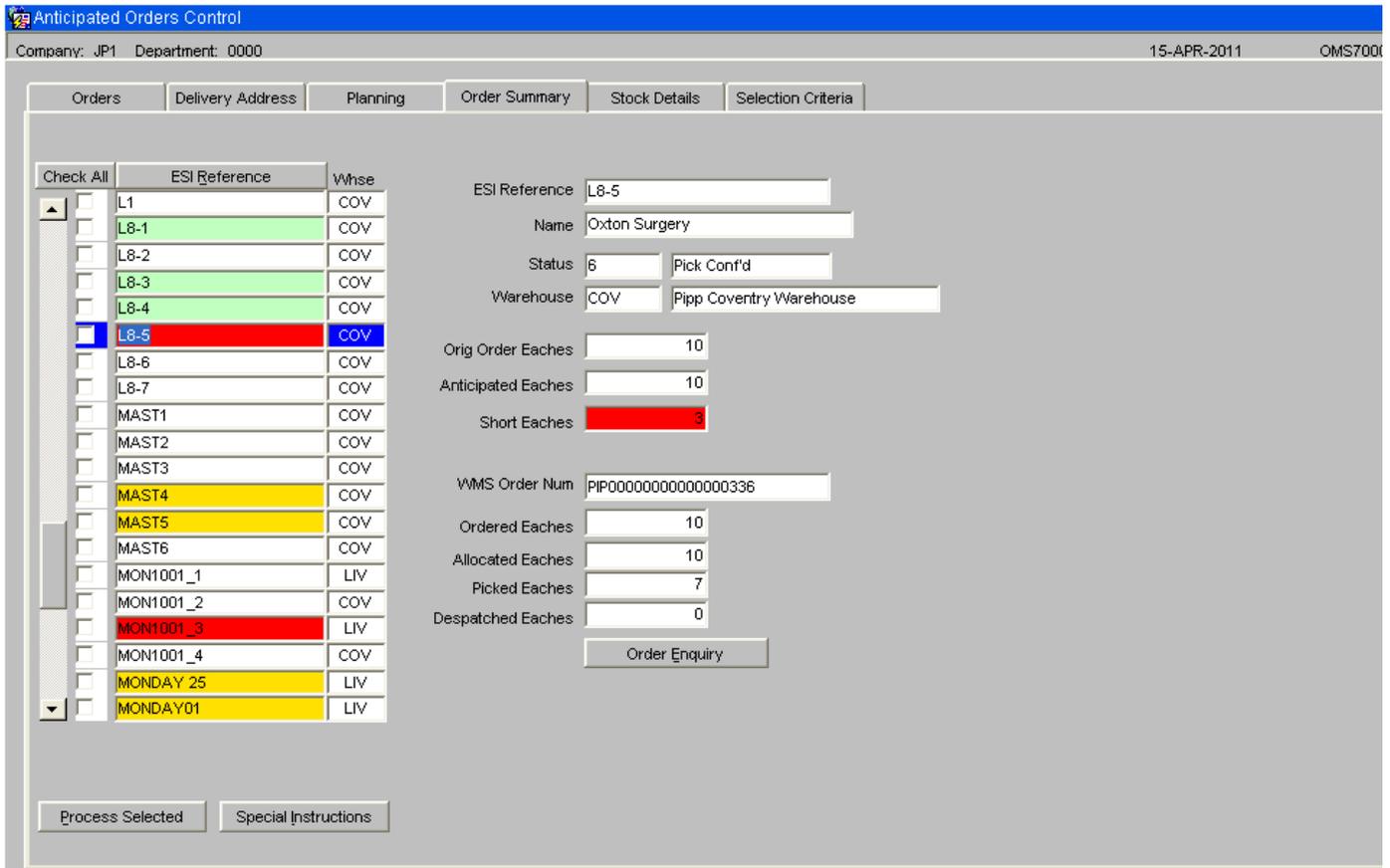


This will show the **current** warehouse search sequence and the Postcode part used.

NB. Any warehouse set as unavailable will be excluded from this display, as it will not be considered when re-assigning the orders.

5.1.5 Anticipated Orders - Summary

This screen (OMS7000) will show the anticipated orders when the **?Order Summary?** tab is clicked, the order summary details will be displayed for the current order. For orders that have been sent to the warehouse, the **?Order Enquiry?** button can be clicked to call the standard order enquiry. This screen will give further details e.g. dates allocated, picked etc.

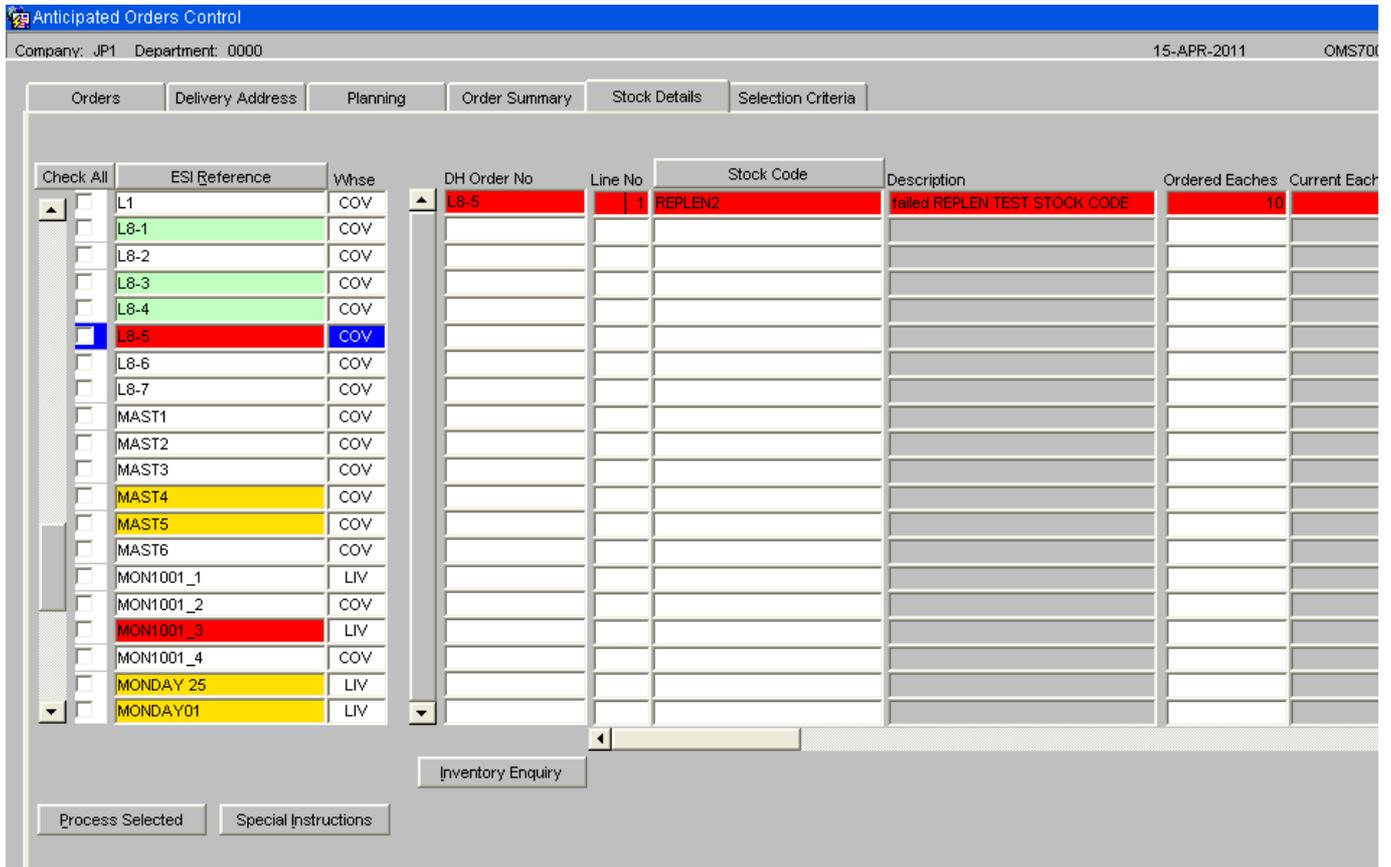


5.1.6 Anticipated Orders - Stock Details

This screen (OMS7000) will show the anticipated warehouse orders when the **?Stock Details?** tab is clicked, the stock lines for the current order will be displayed. If a line on the order is short, this will be highlighted in red, as shown below.

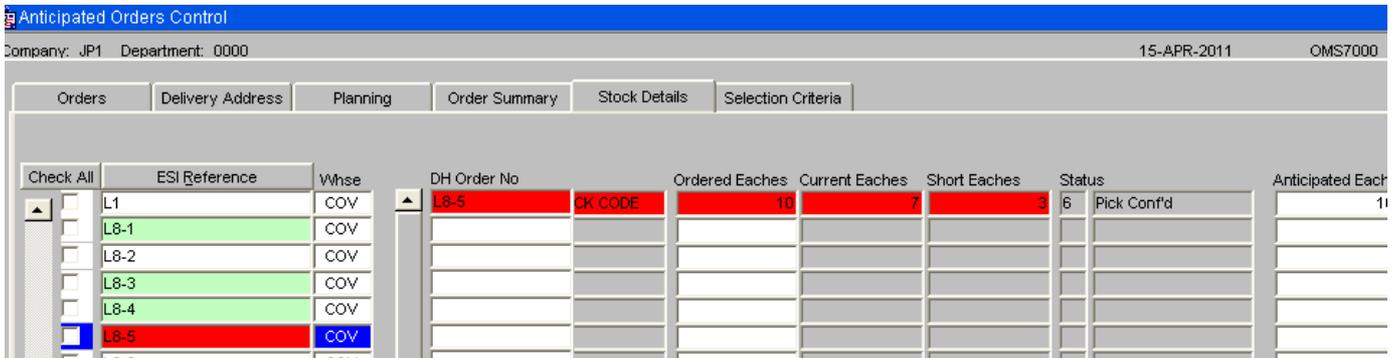
The stock code button can be clicked to change the display from the NPC code to the Generic Sku. The current quantity will show the quantity expected to be delivered. For orders that have been sent to the warehouse and allocated, the current quantity will be set depending upon the order status. For allocated orders, it will be the allocated quantity, for pick confirmed orders, it will be the pick confirmed quantity and for despatched orders it will be the despatched quantity. For orders at the anticipated status or committed status, this quantity will be the anticipated quantity.





The ?Inventory Enquiry? button can be clicked to display the standard inventory enquiry for the current NPC code.

The scroll bar at the bottom of the screen can be used to display further details. All the quantity fields will be displayed as the number of eaches.



A shipping unit description will be displayed to show how the number of eaches has been converted into the quantity anticipated. The calculated required number of eaches will be zero if there is no available stock.



Department: 0000 15-APR-2011 OMS7000 v4.21

Delivery Address Planning Order Summary Stock Details Selection Criteria

ESI Reference	Whse	DH Order No	STOCK CODE	Shipping Unit Details
	COV	▲ L8-4		A INNER contains 5 eaches. Order qty of 50 requires 10 INNER containing 50 eaches.
	COV			
:T1	COV			
:T2	COV			
:T3	COV			
:T4	COV			

5.1.7 Anticipated Orders - Planning

This ?Planning? tab will be used to group orders into loads. To plan orders, the selection criteria tab should be used to refine the number of orders. The following minimum details should be entered.

- Status - Set to ?New? or ?New or Planned? as only orders at this status can be planned,
- Delivery Date - Orders grouped into a load must have the same delivery date.
- Warehouse - Orders grouped into a load must be assigned to the same warehouse.

The sort options, on the ?Selection Criteria? tab, can be used to sort orders by Volume or weight.

The town has a maximum size of 30 characters. Due to limited space on this screen, the full 30 characters will NOT be displayed. The maximum number of characters that can fit within the allocated area will be displayed. This will be approximately 12 characters if the town is in uppercase or approximately 15 characters if the town is lowercase. If the town is blank then the county will be displayed instead.

The system has the ability to display the weight and volume in a specified unit of measure. The preferred units of measure and the volume per pallet are setup on ?OMS Control?. Each user can then override this setting by using ?OMS Users? to set their preferred units of measure against the username. These settings can also be overridden by specifying the units of measure and volume per pallet on the ?Selection Criteria? tab.

The Weight and Volume of each order will be calculated and displayed in the selected Unit of measure. The weight will be calculated as the number of eaches divided by the transit factor (to give the number of shipping units) multiplied by the weight of a shipping unit as setup on stock maintenance. The volume will be calculated as the number of eaches divided by the transit factor (to give the number of shipping units) multiplied by the volume of a shipping unit as setup on stock maintenance. The despatch pallets will be calculated as the volume divided by the Volume per pallet, as displayed on the selection criteria tab.

The ?Check Box? flag will be used to Select / Deselect orders for inclusion / exclusion from a load. The totals, of the selected orders, will be displayed at the bottom of the screen.



Anticipated Orders Control

Company: JP1 Department: 0000 15-APR-2011 OMS7000

Orders Delivery Address Planning Order Summary Stock Details Selection Criteria

Find Load: Add Checked Orders to Existing Load:

Check All	ESI Reference	Whse	Drop	Town	Weight KGM	Volume MTQ	Desp Pallets	Def Vehicle	Enter Vehicle	Route	Load
<input type="checkbox"/>	L1	COV		CH43 9XX Upton Village	211,109.000	37.660	19.020	Artic		V3	000
<input type="checkbox"/>	L8-1	COV		CH43 9TL Prenton	122,221.000	22.200	11.212	7 1/2 T		COVMRRAL	000
<input type="checkbox"/>	L8-2	COV		CH43 9XX Upton Village	166,665.000	30.120	15.212	Artic		COVMRRAL	000
<input type="checkbox"/>	L8-3	COV		CH43 9TL Prenton	22,222.000	4.404	2.224	7 1/2 T		V3	000
<input type="checkbox"/>	L8-4	COV		CH43 9TL Prenton	0.000	0.080	0.040	7 1/2 T		COVPRENTO	004
<input type="checkbox"/>	L8-5	COV		CH42 9QWV Prenton	0.000	0.056	0.028	7 1/2 T		COVPRENTO	004
<input type="checkbox"/>	L8-6	COV		BR11 3ER Birmingham	0.000	0.088	0.044	Artic		COVPRENTO	004
<input type="checkbox"/>	L8-7	COV		CH43 9XX Upton Village	0.000	0.064	0.032	Artic		COVMRRAL	004
<input type="checkbox"/>	MAST1	COV		CH64 1TT Clatterbridge	55,555.000	9.900	5.000	Artic		V3	000
<input type="checkbox"/>	MAST2	COV		CH64 1TT Clatterbridge	55,555.000	9.900	5.000	Artic		V3	000
<input type="checkbox"/>	MAST3	COV		CH64 1TT Clatterbridge	55,555.000	9.900	5.000	Artic		V3	000
<input type="checkbox"/>	MAST4	COV		CH43 9XX Upton Village	55,555.000	9.900	5.000	Artic		V23456789	000
<input type="checkbox"/>	MAST5	COV		CH43 9XX Upton Village	55,555.000	9.900	5.000	Artic		V23456789	000
<input type="checkbox"/>	MAST6	COV		CH43 9XX Upton Village	111,110.000	19.800	10.000	Artic		V3	000
<input type="checkbox"/>	MON1001_1	LIV		CH46 6AF Moreton	111,110.000	19.800	10.000	Van		LIVMORETON	004
<input type="checkbox"/>	MON1001_2	COV		CH46 6AF Moreton	33,333.000	5.940	3.000	Van		COVPRENTO	004
<input type="checkbox"/>	MON1001_3	LIV		CH46 6AF Moreton	111,110.000	19.800	10.000	Van		LIVMORETON	000
<input type="checkbox"/>	MON1001_4	COV		CH46 6AF Moreton	277,775.000	49.500	25.000	Van		COVPRENTO	000
<input type="checkbox"/>	MONDAY 25	LIV		CH46 6AF Moreton	133,332.000	23.760	12.000	Van		LIVMORETON	000
<input type="checkbox"/>	MONDAY01	LIV		CH46 6AF Moreton	55,555.000	9.900	5.000	Van		LIVMORETON	000

Plan Confirm Special Instructions

Load Summary

Weight KGM	Volume MTQ	Despatch Pallets	Orders
0.000	0.000	0	0

The ?Find Load? field at the top of the screen can be used to find a load number. This option will ignore the search settings on the ?Selection Criteria? tab and find ALL the orders assigned to the load.

NB. If a load is created but not sent to the warehouse then it will exist in the Order Management Layer at status Planned. To process this load, the ?Find Load? field MUST be used to find the Load Number. This is to ensure ALL orders assigned to the load are selected, prior to using the ?Plan Confirm? button.

The drop sequences should be entered and saved prior to sending the load to the warehouse as the drop sequence will sequence the assignment of the system order numbers.

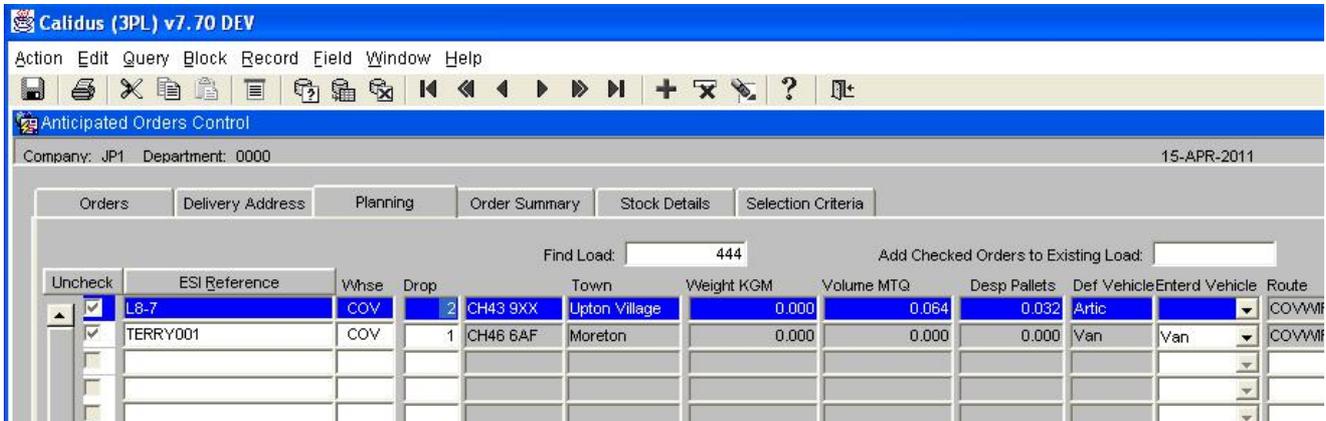
The ?Plan Confirm? button can be clicked to proceed. At this point, the selected orders will be validated to check they are at the correct status, for the same warehouse and for the same delivery date. An error message will be given if the validation fails.

Providing the orders pass the validation, the ?Load Summary? details will be displayed.



The ?Send to Warehouse? button can be used to send the load to the warehouse. This will move the orders onto status Committed.

The drop sequence will be used to reverse sort the orders prior to the generation of the system warehouse order numbers. The first warehouse order number will be for the last drop and the last warehouse order number will be for the first drop. When the warehouse produces the pick list for the route / load, the pick list is sorted by the warehouse order number. This means the order for the last drop will be printed at the start of the pick list as this is the order that should be loaded onto the delivery vehicle first.



5.1.8 Adding Orders to an Existing Load

A field ?Add to Existing Load? will be included on the planning tab. Orders at status New can be added to an existing load by first using the check box to select the required orders. On the Planning tab, the ?Add to Existing Load? field will be used to enter the load number.

A list of values will be available which will show the current planned loads in the OML. It will not be possible to add an order to a load that has already been sent to the warehouse.

As return is pressed in the ?Add to Existing Load? field, the system will validate the selected orders to ensure they are for the same warehouse and delivery date as the orders currently assigned to the existing load. Providing the orders pass validation, the system will populate the route, marshalling location, load date, load time and load number of the selected orders. The system will then automatically display the new load, showing ALL the orders for the load with the new load totals at the bottom of the screen.



Enquiry, this line would show as 2 cases ordered. The pick list, pick confirmation screen etc will all show 2 cases ordered rather than the number of eaches.

If a stock code is setup with a transit factor of zero, then the system will treat this stock as containing 1 each per stocking uom.

For this release, it is expected that the pick wave screen will be used, by the warehouse, to find the orders that are ready for picking. In future, it is expected that the transport planning will set the route and load number which will allow the orders to be created already grouped into a pick wave, ready for allocation.

If the warehouse is set to automatically allocate the orders then any allocation failure will result in the allocation for the entire load / order being rolled back. This means the warehouse will need to manually allocate the orders by using the allocation screen or the pick wave screen.

NB. As the Warehouse order creation runs as a separate process, the sending of the load / order to the warehouse, will NOT be rolled back if the allocation run fails.

5.1.10 Order Cancellation

It is possible to Cancel the Master Order, providing the user has permission to perform this action. If the master order is cancelled, then any anticipated orders will be removed from the anticipated orders tables. The Master Order will remain with a cancelled status. It will be possible to cancel the entire order or a single master order line.

When a master order is cancelled, the system will write details of a zero despatched order to the despatch confirmation transient tables. The next EDI outbound despatch confirmation run will include the cancelled master orders showing zero quantity despatched.

Once orders have been sent to the warehouse for processing, they cannot be cancelled from within the Order Management Layer as stock may have been allocated or picked for the order. Instead orders should be pick confirmed to zero and despatched. This will then send a despatch confirmation message.

Each time the ?Reassess ALL Orders at Status New? button is clicked from ?Anticipated Orders?, the database package that re-creates the Anticipated Orders will be run. This package will first check if any orders have been cancelled in the warehouses. If all the order lines relating to a master order detail have been cancelled then the anticipated order will be reset to status New and the warehouse will be set to ?+?. The warehouse is set to ?+? to highlight the fact that orders have been cancelled in the warehouse. It is possible to enter a warehouse of ?+? in the selection criteria tab to find all orders that do not have a warehouse assigned. At this stage, it will be possible to click the ?Process Selected? button and re-direct the orders to a specific warehouse. Alternatively, the ?Re-assess ALL Orders at Status New? button can be clicked again to recreate the anticipated orders. This second run of the process will assign the warehouse according to the warehouse assignment rules.

NB. A Generic Sku may need more than 1 NPC to satisfy the order line. In this situation, all the related NPC order lines will need to be cancelled before the Order Management Layer will treat the order line as cancelled. The DH order number cannot appear more than once in a despatch confirmation message, this is why ALL the detail lines that relate to a DH order number, must be cancelled before the OML will treat the master order line as cancelled.

5.1.11 Special Instructions

The anticipated orders screen (OMS7000) will include a ?Special Instructions? button. When this button is clicked a despatch text entry popup will appear.

Special Instructions to Print on Despatch Note

For ESI Reference

Deliveries are only accepted after 14:00
Please phone gatehouse 1 hour prior to delivery.
Reception 0151 243 3455



The special instructions will be displayed on the far of the ?Planning? tab which can be accessed by using the scrollbar and scrolling to the right.

Company: JP1 Department: 0000 12-MAY-2010 OMS7000 v4.5

Orders Delivery Address Planning Order Summary Stock Details Selection Criteria

Check All	ESI Reference	Whse	ion	Special Instructions
<input checked="" type="checkbox"/>	12345678901234567890	COV		SPEC1
<input checked="" type="checkbox"/>	12345678901234567891	COV		
<input checked="" type="checkbox"/>	A1	COV		SPECIAL INSTRUCTIONS FOR ORDER A1 LINE 1 SPECIAL INSTRUCTIONS FOR ORDER A1 LINE 2 SPECIAL INSTRUCTIONS FOR ORDER A1 LINE 3
<input checked="" type="checkbox"/>	A2	COV		
<input checked="" type="checkbox"/>	A3	COV		
<input checked="" type="checkbox"/>	A4	COV		
<input checked="" type="checkbox"/>	A5	COV		
<input checked="" type="checkbox"/>	A6	COV		a6 spec1 a6 spec 2 a6 spec 3 a6 spec4
<input checked="" type="checkbox"/>	A7	COV		
<input checked="" type="checkbox"/>	A8	COV		
<input checked="" type="checkbox"/>	A9	COV		
<input checked="" type="checkbox"/>	AA	COV		Deliveries are only accepted after 14:00 Please phone gatehouse 1 hour prior to delivery. Reception 0151 243 3455
<input checked="" type="checkbox"/>	B1	COV		
<input checked="" type="checkbox"/>	B2	COV		
<input checked="" type="checkbox"/>	B3	COV		
<input checked="" type="checkbox"/>	B4	COV		
<input checked="" type="checkbox"/>	B5	COV		
<input checked="" type="checkbox"/>	B6	COV		
<input checked="" type="checkbox"/>	B7	COV		
<input checked="" type="checkbox"/>	B8	COV		

Plan Confirm Special Instructions

Load Summary

Weight KGM	Volume MTQ	Despatch Pallets	Orders
317.023	87.295	44.088	40

The special instructions will be stored at the ESI reference level. A single ESI reference could generate anticipated orders for two or more warehouses. In this case, the ESI reference will be shown more than once on the main orders screen BUT the special instructions will only need to be entered once. The special instructions can be changed at any order status. When the orders are sent to the warehouse, the special instructions (at ESI reference level) will be transferred to the despatch instructions of the WMS order number. Any changes to the special instructions within the OML will be cascaded down to the WMS order number despatch instructions.

If required, the standard order entry screen (SOS1110), ?Order Notes? button, can be used to amend the WMS order despatch instructions. However, if this order is then cancelled and the order re-processed through the OML the despatch instructions will revert back to the Special instructions entered in the OML.

Customer Invoice and Delivery Details

Company: JP1 Department: 0000 12-MAY-2010

Picking Instructions Despatch Instructions Carrier Instructions

Owner: PIP 001 Warehouse Id: COV

Order Number: PIP0000000000000144

ORDER DESPATCH INSTRUCTIONS LINE ONE

ORDER DESPATCH INSTRUCTIONS LINE TWO

ORDER DESPATCH INSTRUCTIONS LINE THREE

ORDER DESPATCH INSTRUCTIONS LINE FOUR

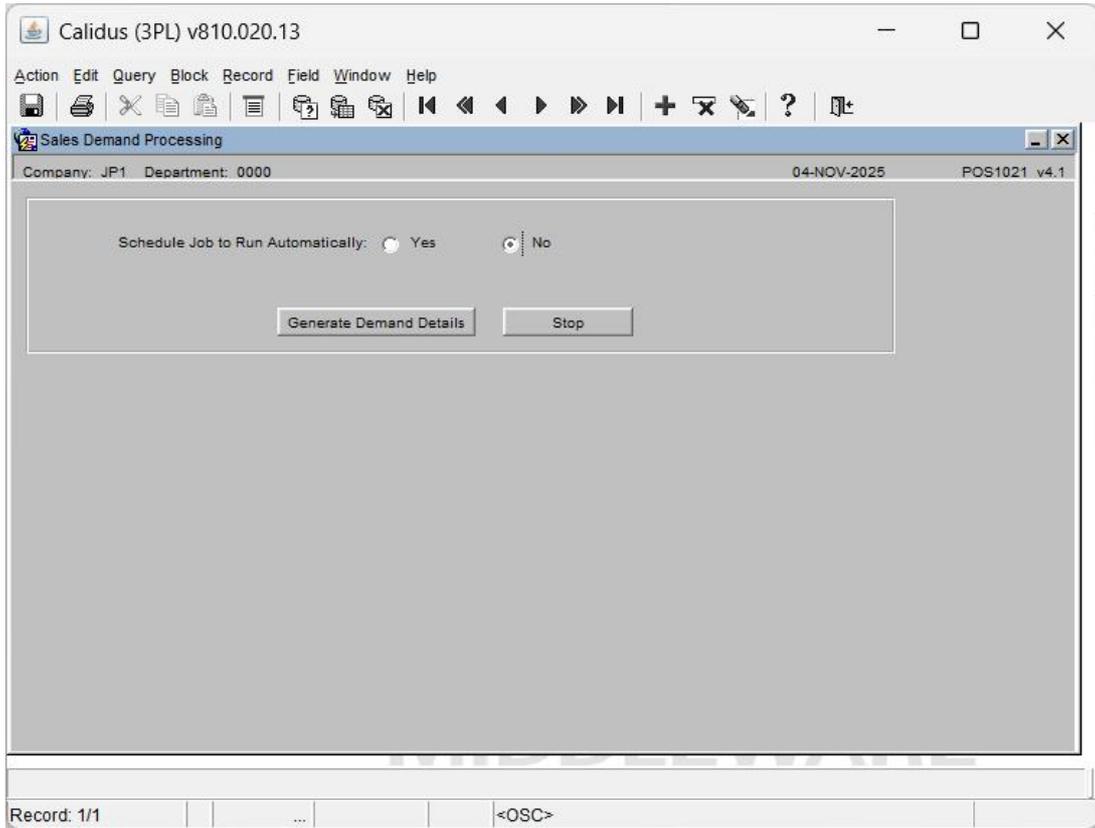
ORDER DESPATCH INSTRUCTIONS LINE FIVE

ORDER DESPATCH INSTRUCTIONS LINE SIX



6 POS1021 Sales Demand Processing

This is the Sales Demand Processing screen.



Here, you can control whether this process is run automatically, **Stop** the process (using the provided button) or manually **Generate Demand Details**.



7 Category: SOP Enquiries

This page lists all enquiries related to the Sales Order Processes.



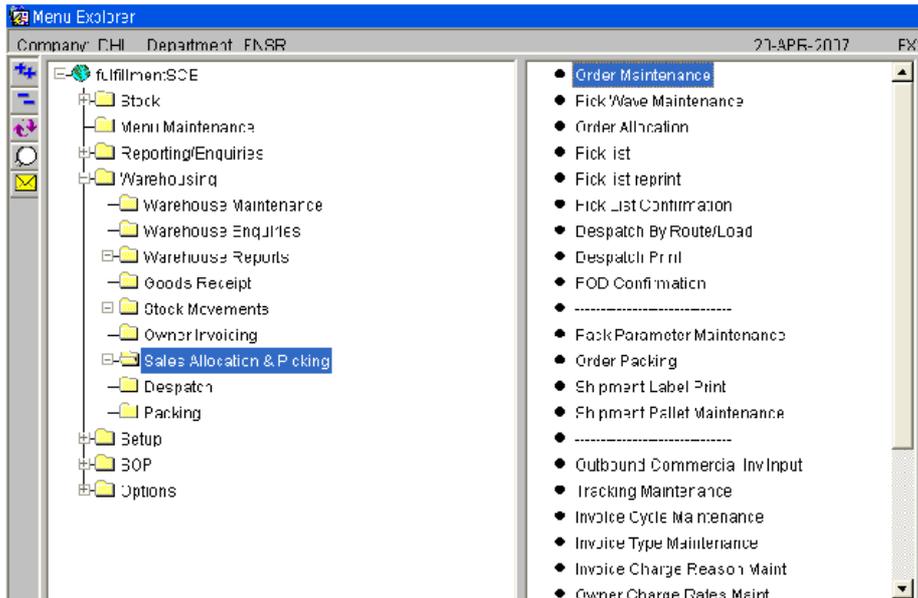
8 Category:SOP Maintenance



9 SOP Navigation

Navigation - Sales Order Processing (SOP)

The screens used for these processes are held in a sub-folder called Sales Allocation and Picking. It can be found on the main menu within the Warehousing folder. Please note that this may differ based on the Users menu setup.



Purpose

Sales Order Processing refers to the process from Orders for Stock coming in to the system via EDI and manually, right the way through to Proof of Delivery (POD) .

The main processes are:

- Order Entry
- Allocation
- Picking
- Picking Confirmation



10 Category:SOP Reports



11 SOP Work Flow

SOP Flow Within the Warehouse - Order Statuses

The Sales Order Process goes through a number of stages.

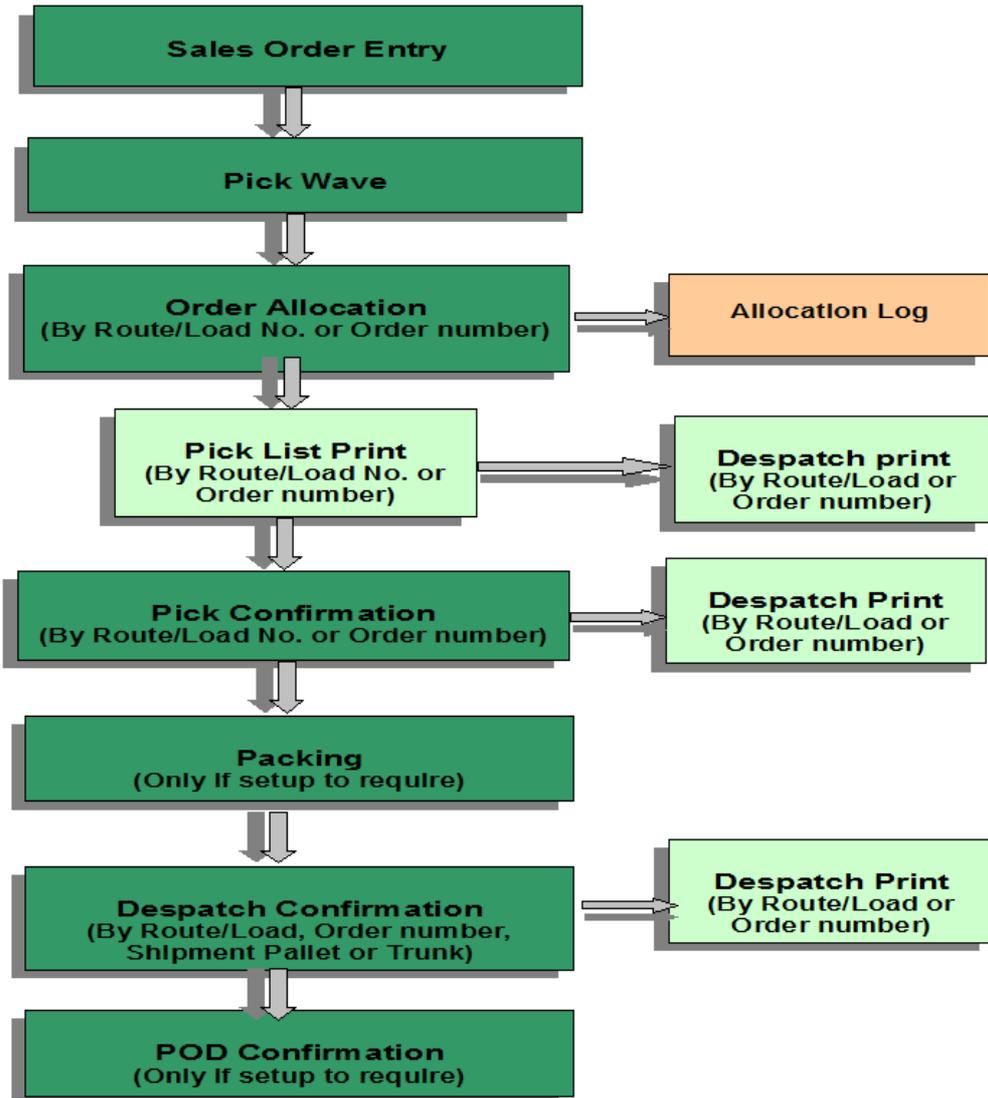
Each stage is represented by a different status, and must be followed in order:

- 0 - Entered (Order header entered only - no detail lines). This does not affect stock on the system.
- 1 - Committed. The product will be flagged as having a committed quantity, this may affect availability for future orders.
- 4 - Allocated. This is where the system will specify a particular pallet in the warehouse determined on the order type (see Order Entry).
- 5 - Pick List. The next status after allocation. Shows that the order has had a pick list printed.
- 6 - Pick Confirmed. After pick list, the pick confirmation process ?moves? the stock virtually from its allocated location to a predefined marshalling location. The user can change the location at this point.
- F/G - Awaiting Customer POD Confirmation/ Depot POD Confirmation. (set against Partners/ Customers.) The stock moves from the marshalling location to a POD location if setup in Default locations.
- 9 - Complete. At this point, the stock has been ?removed? from the system (if you have setup to downdate at despatch rather than pick confirmation) .

Other Statuses which are not as commonly used are:

- I - Awaiting Invoice
- 3 - Back Order
- H - Held
- S - Suspended
- C - Cancelled
- E - Enquiry





12 SOS1110 Sales Order Header Maintenance

This screen allows you to create or amend the header record for the sales order.

All information entered on this screen relates to the customer details for this order and the delivery information. The header can be created either manually or via EDI.

The screen has multiple tabs and options available.

12.1 Order Details Tab

Field Name	Description	Options
<i>Entered By</i>	The user name (login) of the person who is entering the order	No entry allowed - will default to the login id
<i>Int Audit No</i>	The internal system generated audit number	No entry allowed - system generated
<i>Owner **</i>	The owner code of the order - note, if you have owner prompt maintenance default set to ?N? you can enter any owner other than that logged in under as long as it is created against the user id	Must have been set up in owner maintenance - LOV available
<i>Customer **</i>	The customer code that defines who and where the order will be sent to	Must have been set up in customer maintenance - LOV available
<i>Request Type **</i>	The type of order - this will determine what processing can be used during the outbound cycle	S - Sales Order (default) C - Collection Order
<i>Pricing Band</i>	Used for invoicing (not migrated)	Blank
<i>Order Priority **</i>	Used for cross docking and for prioritising orders. Can be used during pick wave to group high priority orders together. Note, if the start due date is set to today + 1 the order will be classed as an express order and a warning message will appear notifying you the system will default the order priority to ?1? for express orders	Must have been set up in order priority maintenance - LOV available



Field Name	Description	Options
<i>Order No</i> **	Can either be a system generated order or a manually entered one	To determine which one is used, you need to set the ?system generated o/n? flag in owner maintenance
<i>Order Type</i> **	U Under bond IWT T Transfer between warehouse S Ships Store O Other N Navy ships K Kit Assembly H Home Use E Export D Diplomatic Privilege C Community A Authorised Destruction H - home use	
<i>Reference</i> **	A unique identifier for this order (normally a customer order number) - the system will warn you if another order exists with the same order reference	20 character free text field
<i>Customer Ref</i>	An additional customer reference that relates to this order (not mandatory or validated)	20 character free text field
<i>Haulier Code</i>	The haulier code for the order	Must have been created in haulier maintenance
<i>Carrier Code</i>	The carrier code for this order. Note, if this field is populated and the owner related flag on carrier maintenance is set to ?Y? an IFTMIN and IFTMBF message will be generated	Must have been created in carrier codes maintenance - LOV available
<i>Routing Code</i>	Client specific functionality for lhub/Ohub functionality and auto carrier population - not migrated	N/A
<i>Select Type</i>	An additional field used to group orders together - not migrated	N/A
<i>Return Indicator</i>	Client specific functionality to determine whether the order requires returns form production at packing. The value entered here is validated against a returns matrix which dictates what text is produced	X,C,N,A or blank
<i>Order Status</i>	Displays the status of the order as it moves through the sales order process	0 - Entered 1 - Committed 4 - Allocated 5 - On pick list 6 - Pick Confirmed F - Awaiting POD Confirmation 9 - Complete I - Invoiced
<i>Complete Delivery</i>	Client specific functionality which prevents an order from being allocated if the complete delivery flag is set to ?Y? and there is not enough stock to fulfil the order - used in conjunction with edi allocation of sales orders	Y,N or left blank
<i>Order Entry Date</i>	This field is for information only and indicates when the order was created.	N/A
<i>Balance</i>	If pricing is in use this information-only field will show the balance outstanding on the order.	N/A
<i>Order Value</i>	If pricing is in use, this information-only field will display the order value.	N/A
<i>Credit Limit</i>	If pricing is in use, this information-only field will display the customer?s credit limit.	N/A
<i>Service Level</i>	Used in conjunction with carrier code and routing code - defines the carrier?s service level this order needs to be delivered on	Must have been created in service level maintenance
<i>Delivery Mode</i> **	Indicates how this order will be delivered. Note, if you enter ?T? the order will be designated as a trunking order and will have to be despatched through the trunking screen	T - trunking D - direct order



Field Name	Description	Options
<i>Route/Load</i>	If the customer code contains a postcode linked to routing information then a route/load can be selected. Will default to the first route code including this customer?s post code.	Must have been created in route codes maintenance - LOV available - note, if the order has been assigned to a route and load in pick wave, the load number will also display
<i>Start Due</i>	The date the order is due to be delivered	Must be a valid date
<i>End Due</i>	The last date the order has to be delivered by	Must be a valid date
<i>Book date/Time</i>	If the order must be delivered according to a booking, enter the date and time.	Must be a valid date and time or left blank
<i>Book Ref</i>	If the order is to be delivered as a booking, enter the booking reference	10 character free text field or left blank
<i>Sales Type</i>	Used for client specific telesales functionality - not migrated	Will default to ?I? no entry allowed
<i>Direct Delivery</i>	An additional field used specify whether orders will be delivered direct to the end point - not migrated	Will default to ?N?
<i>Contact Surname</i>	The surname of the person expecting the delivery - this text will appear on the pick labels	25 character free text field - will default to the customers address
<i>Phone</i>	The telephone number of the customer receiving the order	15 character free text field or left blank
<i>Sales Region</i>	Used in load allocation functionality to specify a route load (not migrated)	N/A
<i>COD Flag</i>	Determines whether the order is ?cash on delivery? - if yes, the information entered will appear on the waybill and the IFTMIN edi message	Y, N or left blank
<i>COD Cash Amount</i>	If a COD order, the amount of money to be paid - will appear on the waybill and the IFTMIN	0 - 9999999.99
<i>COD Reference</i>	If a COD order, the reference number for the COD transaction - will appear on the waybill and the IFTMIN	35 character free text field or left blank

12.1.1 Change Delivery Address Tab

It is possible to change the delivery address while the order header is at status 0: Entered. Once line details have been entered and the order saved this tab is no longer available for amendment.

Select the Yes radio button of the Change Address field to make the right-hand panel available for data entry.



Sales Order Header Maintenance

Company: DHL Department: FNSR 04-DEC-2012

Order Details Change Delivery Address Invoice Address Warehouse Transfers Misc Charges Totals Reference Order Specific Rapid Entry

Owner: XXXA 001 Warehouse Id: XX1
 Order Number: XXXA000000000000000122 Change Address: Yes No **NP Address**

Delivery Address Code: MRTIZ00004
 Name: Mr Tintwhistle
 Delivery Address: 77 Long Lane
 Walton
 Liverpool
 County/State:
 Post Code: L34 321
 Country: GB

New Name:
 New Delivery Address:
 County/State:
 Post Code:
 Country:
 Email Address:

Save Address for Customer

Field Name	Description	Options
<i>New Name</i> **	Enter the new name of the customer	35 character free text field
<i>New Delivery Address</i> **	Enter up to three address lines, excluding the county or state; lines 1 & 2 are mandatory	3 lines of up to 35 characters per line
<i>County / State</i>	Enter the county or state	35 character free text field
<i>Postcode</i>	Enter the postcode	10 character free text field
<i>Country</i> **	Select the country code	Must have been created in countries maintenance - LOV available
<i>Save Address for Customer</i>	Check this box to save the address	
Buttons		
NP Address	Allows the user to view, amend or add to the notify party address	

12.1.2 Miscellaneous Charges Tab

If SOP invoicing is to be used, this screen allows you to add and amend miscellaneous charges for this order.



Sales Order Header Maintenance

Company: DHL Department: FNSR 04-DEC-2012

Order Details | Change Delivery Address | Invoice Address | Warehouse Transfers | Misc Charges | Totals | Reference | Order Specific | Rapid Entry

Customer: 000091 001 Owner: XXXA 001
 Order No.: XXXA000000000000000124 Entered By: LEN

Charge Code	Date Set	Charge Rate	Total	Return Indicator (Detail Level)

Field Name	Description	Options
<i>Charge Code</i> **	The charge code to be applied to this order	Must have been created in charge codes maintenance - LOV available
<i>Charge Rate</i> **	The charge rate (%) to be applied to this order	Will default to the rate set against the charge code
<i>Total</i>	The total charges raised against the order	System generated calculation
<i>Return Indicator (Detail Level)</i>	Specifies at order detail level whether that line has text to be reported on the returns form - the text to be produced is validated against the returns matrix	Check box

12.1.3 Totals Tab

This screen displays the totals per product type on the order



Field Name	Description	Options
<i>Carrier Code</i>	Will default to the carrier code entered at order header	
<i>Master Document No</i>	The master airway bill number for the order - will appear on the waybill and the IFTMIN. Can be entered or will auto populate once assigned in Trunking/consolidation screen.	
<i>Master Document Date</i>	The date the master airway bill number was assigned	
<i>Document Reference</i>	The house airway bill number for the order - will appear on the waybill and the IFTMIN. Can be entered or will auto populate once assigned in Trunking/consolidation screen.	If no MAWB entered, will default to the system generated order no.
<i>Transport Reference</i>	The reference number for this order assigned by the carrier.	
<i>Transport Date</i>	The date the order is due to be shipped .	
<i>Transport Terms</i>	Who pays for the transport of the order. Note, if ?? is entered an additional field will display prompting for the account number of the carrier.	Options are:-1. Consignor - 2. Consignee - 3. Third Party
<i>Container No</i>	The container number the goods are being shipped onto - this will appear on the waybill and IFTMIN.	
<i>Warrant Number</i>		
<i>Delivery Description</i>		
<i>Despatch Ref</i>		

Buttons

Exit Return to the *Order Details* tab

12.1.5 Order Specific Tab

This screen allows you to enter some order-specific information against the order.



Field Name	Description	Options
Mobile Tel no		
Work Tel No		
Store Code		
Store Description		
Reference		
Block Exchange		No, Yes

Buttons

Exit Return to the *Order Details* tab

12.1.6 Options

The following buttons are available from the *Order Details* tab:

Button Name	Description
Line Details	Takes the user to the detail screen in order to enter stock codes and quantities to be ordered (see SOS1117).
Cancel Order	If pressed, the order will be cancelled. The status will change to ?C? and no further processing will be allowed.
Create Del Addr	If pressed, the user is taken to a similar screen as the ?Change Delivery Address? tab - the user can add additional delivery addresses here for the customer. This is the Partner Address Maintenance screen PFS1810.
Create Inv Addr	If pressed, the user is taken to a similar screen as the ?Change Delivery Address? tab - the user can add additional invoice addresses here for the customer. This is the Partner Address Maintenance screen PFS1810, preset for address type INV.
Invoicing	Displays the invoicing charges currently applied to the order on screen WHS7093. The user also has the ability to enter additional charges (see SOP Invoicing guide for details)
POD	Allows the user to enter POD information
EDI Out	
Order Notes	Allows the user to enter pick, despatch and carrier instructions that will appear on the pick list, despatch note and carrier labels. This will be through a pop-up screen SOS1111, with multiple tabs for each of the instructions.



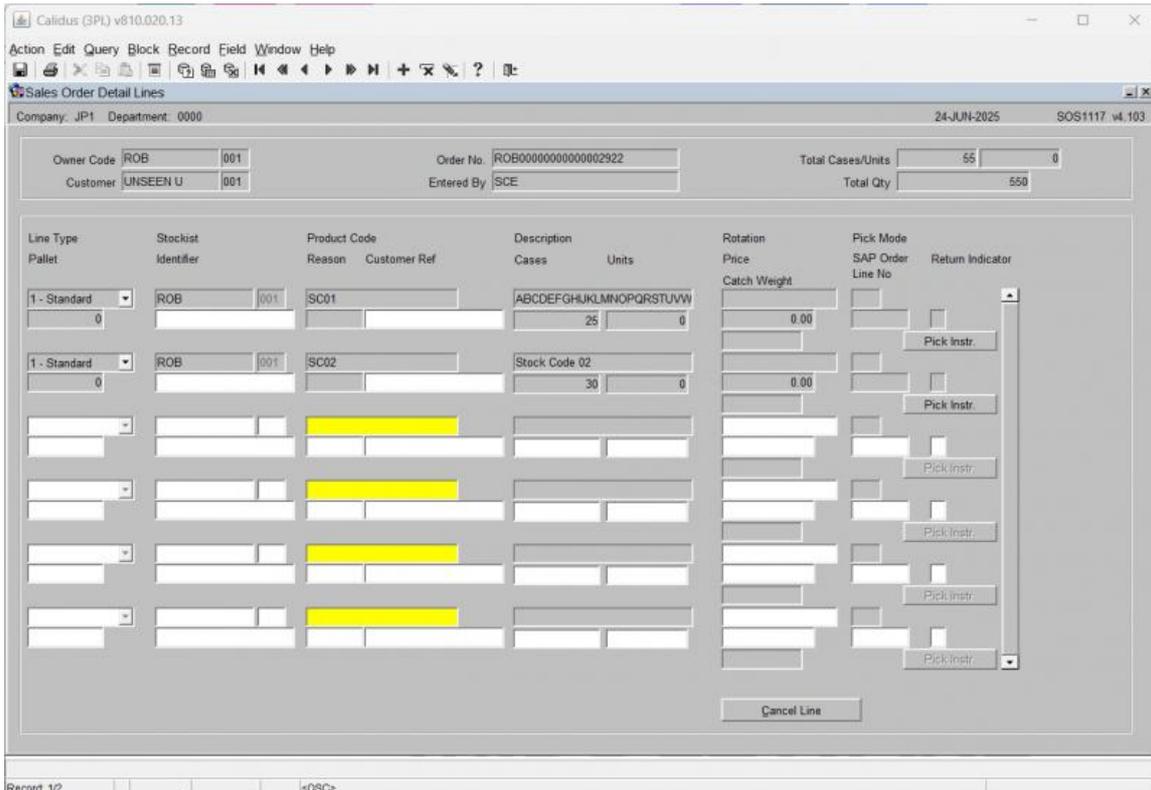
Button Name	Description
Invoice Notes	Allows the user to enter text that will be produced on the invoice print. This will be through a pop-up screen SOS1135.

12.1.7 Sales Order Details (SOS1117)

The detail screen holds the product and quantity information for the order.

Each line can also have different processing values (line Type) which dictates how the stock is allocated at a later stage.

Information messages will provide details of the amount of available stock, if the order quantity exceeds the available quantity and for the calculated price.



Field Name	Description	Options
<i>Line Type</i>	The line type allows stock preferences within a product to be specified, for example, stock with particular rotation details.	Default is ?1? which allows the system to dictate which pallet should be used based on the allocation rules. (See Allocation).
<i>Stockist</i>	The owner code of the order. Note, if you have owner prompt maintenance default set to ?N? you will be able to enter any owner code assigned to your user id.	
<i>Product Code</i>	The product code and description of the stock being order.	Must have been setup in Stock Codes Maintenance.
<i>Description</i>	The description of the product selected	display only
<i>Rotation</i>	If using line type ?3? the rotation field will become enabled for you to enter a system rotation.	Must have been booked onto the system previously
<i>Pick Mode</i>	The picking mode to be used if pallet levelling is in operation (not used)	
<i>Pallet</i>	If using line type ?4? the system pallet id field will become enabled for you to order by a specific pallet id.	Must have been booked onto the system previously .
<i>Identifier</i>	If using line type ?5? the Identifier field will become enabled for you to order by customer rotation.	
<i>Reason</i>		



Field Name	Description	Options
	If the customer allows the ordering of held stock, a reason code can be entered here. If the stock code exists on the WMS held under that reason code, the order can be raised (not migrated)	Must have been setup in reason codes maintenance .
<i>Customer Ref</i>	A customer specific reference number for the order.	
<i>Cases</i>	The quantity of cases to be ordered .	
<i>Units</i>	If the two unit of measure flag is set to ?Y? in owner maintenance, the units field will become enabled. The user can then order in either cases or units.	
<i>Price</i>	The price of the stock. Will default to the price set up in stock maintenance, or can be overridden here if owner maintenance SOP/Charging tab is set to ?Y? for price change allowed.	
<i>SAP Order Line No:</i>	Client specific functionality to uniquely identify the order line (used for outbound commercial invoice.	
<i>Return Indicator</i>	Check this box to indicate if this item can be returned.	Will default to returns matrix for detail level text on the returns form.

Buttons

- Pick Instr.** The **Pick Instr.** Button takes the user to an additional pop-up screen where they can enter picking instructions. These will appear on the pick list.
- Cancel** The **Cancel** Line button enables the user to cancel an individual line instead of the whole order.

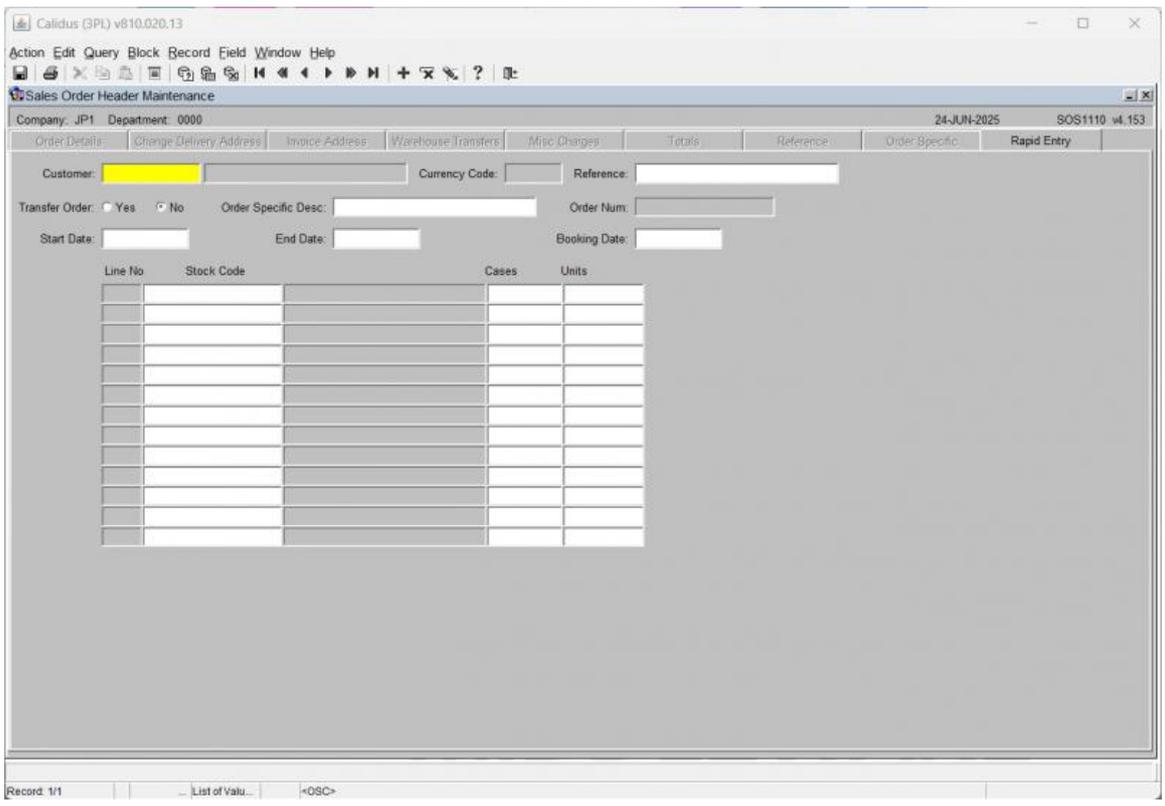
You can exit back to the Sales Order Header maintenance screen using the **Exit** toolbar button, the **X** in the corner of the screen or by pressing F4.

12.1.8 Rapid Order Entry

As an alternative to the standard order entry screen there is also an option of using the Rapid Order Entry Screen, which allows for an order to be created with the minimum of data entry.

This is a variant tab on the existing Sales Order Header Maintenance screen, which can only be accessed direct from the menu.

All orders will automatically be created with a Line Type of '1' by default.



Field Name	Description	Options
<i>Customer Code</i> **	The customer code	An LOV is available
<i>Reference</i>	The customer reference	
<i>Transfer Order</i>	Whether this is considered a transfer order	Option select - Yes or No, defaulting to No
<i>Order Specific Desc</i>	An order specific description field - an alternative reference.	
<i>Start Date</i>	Start Date, End Date and Booking Date will all default to the current system date as you tab through them, but can be modified.	
<i>End Date</i>	Start Date, End Date and Booking Date will all default to the current system date as you tab through them, but can be modified.	
<i>Booking Date</i>	Start Date, End Date and Booking Date will all default to the current system date as you tab through them, but can be modified.	

Once the header section has been completed then you must enter in the stock details,

Field Name	Description	Options
<i>Line No</i>	The unique order line number.	This is automatically generated for you when the line is created.
<i>Stock Code</i>	The stock being ordered. The description of the stock code is displayed once selected	An LOV is available
<i>Cases</i>	The quantity of cases to be ordered.	Enter as required
<i>Units</i>	If the two unit of measure flag is set to ?Y? in owner maintenance, the units field will become enabled. You can then order in either cases or units.	Enter as required

Once complete, the order will then be moved through the system via the normal processes.

 **Note:** It is only possible to create orders using this option. To amend or view existing orders then the standard Order Entry Screen must be used (SOS1110).

12.1.9 Additional Functionality within Rapid Order Entry

Placing orders automatically on Hold dependent on customer authorisation



Customer Wizard

Owner: XXA Warehouse: XX1 28-JUL-2011 WHSORA035 v4.29

Partner Code: X-001 001 Credit Limit 0.00
 Full Name: Customer Current Order Balance 0.00
 Currency: GBP British Pound Remaining Credit 0.00

Delivery Details Invoice Address SOP Details Customer Restrictions

Customer Type: [] Edi Identifier: []
 Part Of Desp Order: Yes Prevent Entry of Sales Orders: No
 Part Of Desp Item: Yes Client Account Code 1: []
 Priority Code: [] Dispute Codes [X] Account Code 2: []
 Payment Set: [] Account Code 3: []
 Paying Office: [] CC No. Required: No
 Paying Office Ac No: [] Find % [] Location Pre-Pass: []
 Payment Terms: []
 Package Labels Required: Do not Print
 Detail Labels Required: Do not Print
 Transport Labels Required: No simplified
 Area Manager: []
 Weekly Invoicing: No
 VAT Applied: No
 Automatic Charge Code: []
 Customer Proof of Delivery Required: Yes
 Depot Proof of Delivery Required: No
 Only accept Complete Backorder: []
 Special Pack Message Id: []
 Last Order Date: []

Dispute Codes

Dispute Code	Description
0	Ok
9	Disputed

Find []
 Find OK Cancel

Repalletise: []
 On of Held Stock: []
 Minimum Order Qty: []
 Credit Limits Apply: []
 Use Cust Stock AKA: [x]
 Dispute Code [] Ok

By setting the Dispute Code to '9' (Disputed), then all orders created for this customer will automatically be placed on hold.

To release orders for allocation the user will need to use the [Change Order Status Screen \(SOS1270\)](#).

There is also the option to create an internal job that will automatically delete any orders at status Held after a pre-determined number of days. See [EDI Setup and Processing](#).

Note: The Hold function will only work when using the Rapid Order Entry screen - this functionality has not been built into the standard order entry screen.



14 SOS3000 Customer Wizard

An optional process, if a record for Proof of Delivery is required, the following screen can be used to confirm how many cases/units have actually been delivered to the end customer.

Note: in order to use this functionality, 'POD Required?' flag must be set to 'Y?' in customer maintenance. (see below)

The screenshot shows the 'Customer Wizard' application window. At the top, it displays 'Owner: XXA Warehouse: XX1' on the left and '01-AUG-2011 WHSORA035 v4.29' on the right. Below this is a summary section with the following fields:

- Partner Code: A-0092DF 001
- Full Name: Mr Tintwhistle
- Currency: GBP British Pound
- Credit Limit: 0.00
- Current Order Balance: 0.00
- Remaining Credit: 0.00

Below the summary is a tabbed interface with four tabs: 'Delivery Details', 'Invoice Address', 'SOP Details', and 'Customer Restrictions'. The 'Customer Restrictions' tab is currently selected. The main area contains numerous fields and dropdown menus organized into two columns:

- Left Column:** Customer Type, Part Of Desp Order (Yes), Part Of Desp Item (Yes), Priority Code, Payment Set, Paying Office, Paying Office Ac No, Payment Terms, Package Labels Required (Print Labels), Detail Labels Required (Print Labels), Transport Labels Required (No simplified labels required), Area Manager, Weekly Invoicing (No), VAT Applied (No), Automatic Charge Code, Customer Proof of Delivery Required (Yes), Depot Proof of Delivery Required (No), Only accept Complete Backorder, Special Pack Message Id, Last Order Date.
- Right Column:** Edi Identifier, Prevent Entry of Sales Orders (No), Client Account Code 1, Client Account Code 2, Client Account Code 3, SSCC No. Required (No), Allocation Pre-Pass, Repallete (No), Allow Allocation of Held Stock (No), Maximum Order Qty, Credit Limits Apply, Use Cust Stock AKA (checkbox), Dispute Code (9 Disputed).

Orders must despatched and be at the correct status to allow for them to be POD confirmed, i.e. status 'F'



POD Confirmation By Order Number

Company: JP1 Department: 0000 01-AUG-2011 SOS3000 v4.15

Order Owner Code: Order:

Customer Code: Mr Tintwhistle Addr No:

Despatch Date: Pod Received:

Date/Time Delivered: Signed By:

Date/Time Received: Driver/Intake Ref:

Expected Rtn Date: Goods Return Note:

ETA Date: On Time:

Carrier Code: Carrier Reference:

Totals

Ordered: Despatched: Proved Del:

Product	Description	Rotation No	Despatched	Delivered	Weight Despd	Del Weight	Line Qty	Discrepancy
E2	Standard Code	DSF787	2	2	0.00	0.00	N	
E1	Non Pallet Pick Face	+	3	3	0.00	0.00	N	

Buttons: Proof Delivery, POD Reason Codes, Confirm POD, Cancel

Field Name	Description	Options
Order Owner Code **	The owner of the order to be POD confirmed - will default to current	Must have been created in owner maintenance - LOV available
Order **	The order number to be pod confirmed	Must be at status ?F?
Customer Code	The customer code the order was raised against	Display only
Addr No	The address number the order was delivered to	Display only
Despatch Date	The date the order was despatch confirmed	Display only
Date/Time Delivered **	Prompts for a date and time for actual physical delivery to the end customer	Must be a valid date and time
POD Received **	Prompts for confirmation that the POD was actually received from the end customer	Y or N
Date/Time Received **	The date and time the POD was received	Must be a valid date and time
Signed By **	The name of the person who signed for the delivery	20 character free text field
Expected Rtn Date	The date the stock is due to be returned to the warehouse (if a return is required)	Must be a valid date
Goods Return Note	The return note reference number the order will be returned on	30 digit numerical field
ETA Date	The estimate time the goods will arrive at the warehouse	Must be a valid time
On Time	Specifies whether the order was delivered on time	Y or N
Totals: Ordered	The total ordered quantity	Display only
Totals: Despatched	The total quantity despatch confirmed	Display only
Totals: Proved Del	The actual quantity received on the POD - note this will default to the same as the despatched quantity unless amended	Display only
Product	The stock code of the order line	Display only
Rotation No	The system rotation number (batch) of the order line	Display only
Weight Despd	The total weight of the despatch confirmed quantity	Display only
Description	The product description of the stock ordered	Display only



Field Name	Description	Options
<i>Delivered</i>	The quantity received on the POD - note this will default to the same as the despatched quantity unless amended	Display only
<i>Del Weight</i>	The total weight of the quantity on the POD - will update if the quantity is amended	Display only
Buttons	Description	
Proof Delivery	Takes the user to POD text which allows them to enter specific information received on the POD 5 x 70 character free text fields	
POD Reason Codes	Takes the user to an additional screen to enter reason codes if the quantity to be POD confirmed is different to the despatched quantity. This will then put the missing stock into a virtual location for investigation	
Confirm POD	Confirms the totals entered as POD confirmed. Once actioned, cannot be reversed	
Cancel	Cancels the POD confirmation (not migrated)	

POD Reason Code

Company: JP1 Department: 0000 01-AUG-2011 SOS3000 v4.15

Stock Code: E2 Standard Code
Rotation No: DSF787

Reason	Description	Not Delivered	Good/Bad	Invoice Flag
QA	Quality Assurance	1	G	N

Return

Field Information -

- *Reason* - Reason Code and description which can be either directly entered or selected from a LOV. The description will be displayed once selected.
- *Not Delivered* - The quantity of stock not delivered
- *Good/Bad* - Type of reason code, Good means the stock will be returned to the warehouse
- *Invoice Flag* - display only



15 SOS5100 Split Orders

Using the Split Order's screen it will be possible for orders to be split to allow for multiple despatches. Upon entry into the form the user will be able to query an order number at status 1 and a list of the order lines and product codes and order quantities will be displayed. The user will then be able to choose order lines to be split onto a new sales order using radio buttons. Once the user has chosen all the order lines they wish to be transferred, they will be expected to click a "Confirmation" button to create the new order.

Line No	Type	Stockist Code	Stock Code	Ordered Cases	Ordered Units	Copy
1	1	XXA 001	E2	15	0	<input type="checkbox"/>
2	1	XXA 001	E3	51	0	<input checked="" type="checkbox"/>
3	1	XXA 001	E1	6	0	<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

Upon confirmation, the order lines chosen will be removed from the current order and a new system order number will be created. The user will be informed of the new system order number. The new order will contain the same header details as the original. The address and order level text details will be duplicated. The total ordered qty, weight and volume will be recalculated for both orders. The order entry date, time and order taker user id will be transferred from the original order number. If the original order is assigned to a route/load, then the new order will also be assigned. Any relevant EDI jobs will process the order as standard.

It will not be possible to split an order that has gone beyond status '1', i.e. has been allocated. Once the new order has been created, it will not be possible to transfer the order lines back to the original order.



16 SOS7000 NOMS Order Entry

This is the Simple Order Entry screen for NOMS.

This is used to create new orders quickly with the minimum data requirement.

Enter a Customer. The screen will display:

- *Customer Name*
- *Prison Code*
- *Location*
- *Order No* - generated
- *Entered by* - your user ID
- *No of Units* - calculated as the order is entered
- *Credit Limit* - the credit for the customer.
- *Remaining Credit* - the customer's remaining credit
- *Balance* - the remaining balance
- *Order Value* - calculated as the order is entered

The table below allows entry of products onto the order.

Enter a *Product* or use an LOV to find a product. The screen will display the *Description* and *Unit Price*.

Enter an *Order Quantity*. The *Line Value* will be calculated automatically.

Repeat for all products on the order.

Click **Order Completed** and the order will be created and submitted.

16.1 Examples

 **Note:** These examples reference Deals above.

User runs NOMS format order entry screen



Company: JP1 Department: 0000 02-JAN-2024 SOS7000 v4.78

Warehouse: NFT Default Warehouse Name
 Customer: []
 Prison Code: []
 Location: []

Owner Code: D1P 001
 Order No.: []
 Entered By: []
 No Of Units: []

Credit Limit: []
 Remaining Credit: []
 Balance: []
 Order Value: 0.00

Line	Product	Description	Unit Price	Order Qty	Line Value

User enters a Customer code ?Prisoner? and a stock code ?SC01? - creating order **D1P0000000000023851**

Company: JP1 Department: 0000 02-JAN-2024 SOS7000 v4.78

Warehouse: NFT Default Warehouse Name
 Customer: PRISONER 1 Edmund Dantes
 Prison Code: DIF Chateau D'if
 Location: 01/01/01

Owner Code: D1P 001
 Order No.: D1P0000000000023851
 Entered By: DAVE9
 No Of Units: []

Credit Limit: 10,000.00
 Remaining Credit: 9,684.75
 Balance: 315.25
 Order Value: 0.00

Line	Product	Description	Unit Price	Order Qty	Line Value
1	SC01	Stock Code 01	0.65	1	0.65

User enters in a second order line, this time for DEALS10, which is on a deal where £0.15 is discounted for every item ordered

Company: JP1 Department: 0000 02-JAN-2024 SOS7000 v4.78

Warehouse: NFT Default Warehouse Name
 Customer: PRISONER 1 Edmund Dantes
 Prison Code: DIF Chateau D'if
 Location: 01/01/01

Owner Code: D1P 001
 Order No.: D1P0000000000023851
 Entered By: DAVE9
 No Of Units: 2

Credit Limit: 10,000.00
 Remaining Credit: 9,683.25
 Balance: 316.75
 Order Value: 1.50

This order contains a deal

Line	Product	Description	Unit Price	Order Qty	Line Value
1	SC01	Stock Code 01	0.65	1	0.65
2	DEALS10	Deal Stk Code 10	1.00	1	1.00

User enters in a third line (355177A) - this is stock code linked to a deal, but needs stock code 355177B record to be ordered to trigger the deal

Company: JP1 Department: 0000 02-JAN-2024 SOS7000 v4.78

Warehouse: NFT Default Warehouse Name
 Customer: PRISONER 1 Edmund Dantes
 Prison Code: DIF Chateau D'if
 Location: 01/01/01

Owner Code: D1P 001
 Order No.: D1P0000000000023851
 Entered By: DAVE9
 No Of Units: 3

Credit Limit: 10,000.00
 Remaining Credit: 9,677.75
 Balance: 322.25
 Order Value: 7.00

This order contains a deal

Line	Product	Description	Unit Price	Order Qty	Line Value
1	SC01	Stock Code 01	0.65	1	0.65
2	DEALS10	Deal Stk Code 10	1.00	1	1.00
3	355177A	Stock Code 355177A	5.50	1	5.50

User enters in a final fourth line (355177B), which triggers the creation of deal DEAL_3003, as the order contains both 355177A and 355177B stock details



NOMS Order Entry

Company: JP1 Department: 0000 02-JAN-2024 SOS7000 v4.78

Warehouse: NFT Default Warehouse Name Owner Code: D1P 001 Credit Limit: 10,000.00

Customer: PRISONER 1 Edmund Dantes Order No: D1P0000000000023851 Remaining Credit: 9,673.25

Prison Code: DIF Chateau D1f Entered By: DAVE9 Balance: 326.75

Location: 01/01/01 No Of Units: 4 Order Value: 11.50

This order contains 2 deals

Line	Product	Description	Unit Price	Order Qty	Line Value
1	SC01	Stock Code 01	0.65	1	0.65
2	DEALS10	Deal Stk Code 10	1.00	1	1.00
3	355177A	Stock Code 355177A	5.50	1	5.50
4	355177B	Stock Code 355177B	6.25	1	6.25

How the order value is calculated:

Order Line Values

Stock	Value
SC01	0.65
DEALS10	1.00
355177A	5.50
355177B	6.25
Total	13.40

Deal Discount Values

Deal	Discount Value
DEALS10	0.15
DEALS_3003	1.75
Total	1.90

Total Order Value

Total Order Line Value	13.40
Total Deal Discount	1.90
Total	11.50

Hence the order value is the 'base' line value minus the 'deal' discount value.

NOTE: Order values are not amended as part of allocation/picking - they are only updated when order is despatched.



17 SOS7050 Order Returns and Amendments

In standard warehouse logic, a despatched order cannot be amended, as the stock has been downdated.

However, the Prison's operations required the user to be able to amend a despatched order.

In theory an order can be amended multiple times, but **OPERATIONALLY** it will be only once.

Orders can be either returned or amended.

This is the Order Returns and Amendments screen for NOMS.

In this screen, you can find existing sales orders and amend or return them.

Find an order by entering the customer and/or the original order number. An LOV is available for the Order Number.

The screen will display some header information regarding the order:

- *Owner Code*
- *Warehouse ID*
- *Sales Territory*
- *Route*
- *Load*

The screen will display the lines on the order:

- *Line No*
- *Stock Code*
- *Description*
- *Original*
 - ◆ *Ordered*
 - ◆ *Despatched*
 - ◆ *Unit Price*
- *Prev*
 - ◆ *Desp Qty*
- *New*



- ◆ *Ordered*
- ◆ *Despatched*
- ◆ *Unit Price*

Once found, you can mend the lines on the order using the *New* section. Once amendments are complete, click the **Validate and Submit Amendments** button.

There are various actions that you can take:

- **View Previous Amendments** - the screen will show you any previous amendments that have been done on the order, as indicated in the *Prev* column.
- **Original Order Enquiry** - the Sales Order Enquiry screen **ENQSOON01A** will be opened showing the original order details and pick pages.
- **Original Line Enquiry** - the Sales Order Enquiry screen **ENQSOON01A** will be opened showing the original order details and pick pages.
- **Stock Enquiry** - the Stock Enquiry screen **ENQSKSK01A** will be opened showing the stock details of the selected line.
- **Return Whole Order** - a new Sales Order Return will be created for all lines and quantity on the order..
- **Validate and Submit Amendment** - any amendments you have made in the *New* section will be validated and submitted.



18 WHS0168 Detail Handling Charges

Here you can enter charges against an order.

You can choose to view the Owner or Customer charges using the radio buttons provided - the screen will automatically display the relevant charges in the table below.

The screen will display:

- **Remove:** a button to remove the charge from the order.
- **Charge Code **:** the charge code - a lookup button is provided, and the description will be displayed when selected. This is required when entering.
- **Rate ID **:** the rate - a lookup button is provided, and the Unit of Measure and Rate will be automatically populated from the rate information.
- **Unit of Measure:** the UOM for the rate ID. Display only.
- **Rate:** The rate, defaulted from the rate ID selected. This may be modified.
- **Quantity **:** The quantity of the rate selected. For example, for multiple handling charges, you can add the handling charge rate ID, then add a quantity of two to double it.
- **Value:** The value of the charge. This will default from the rate and quantity entered. Display only.
- **Invoice No:** The invoice on which this charge has been produced (if any). Display only.
- **Misc Inv Select:** Whether this charge should be included on a miscellaneous invoice (see below for more details).

You may enter a *Tax Point Date* for the invoice production.

You can view the auto charges that apply using the **Auto Charges Apply** button. A pop-up window will display them.

You can produce a miscellaneous invoice using the **Product Misc Invoice** button provided. Note that you must enter a tax point date before you can do this.



19 WHS1714 Pick Confirmation

Once the picker has completed picking, this screen enables the warehouse supervisor to confirm the pick details.

Select Route/Load or Order Number to pick confirm a range of orders or an individual order. Once completed, the order will move onto status ?6? and the stock will move from its original picking location to a marshalling location.

Order	Prod Type	Page No	Picker	Checker	Pick Date	Pick Start	Finish	Confirm
D1P0000000000024011	1 Food	1	001	002	04-JUN-2024	08:28	08:30	N
D1P0000000000024012	1 Food	1	001	002	04-JUN-2024	08:35	08:35	N
D1P0000000000024013	1 Food	1	001	002	04-JUN-2024	08:49	08:49	Y
D1P0000000000024015	0 General Stock	1						N
D1P0000000000024015	0 General Stock	2						N
D1P0000000000024015	0 General Stock	3						N
D1P0000000000024015	1 Food	0						N
D1P0000000000024015	1 Food	4						N
D1P0000000000024015	1 Food	5						N
D1P0000000000024015	1 Food	6						N
D1P0000000000024015	1 Food	7						N
D1P0000000000024015	1 Food	8						N
D1P0000000000024015	1 Food	9						N

Field Information:

- **Show All Orders:** Allows you to select orders at status ?5? only or all orders at status ?5? and above.
 - ◆ Y = status 5 and over
 - ◆ N - status 5 only
- **Choose By:** Enables the selection of orders to confirm by route/load or by order number. Route load will enable the route/load field, order number will enable the order from/to fields.
- **Route/Load:** The route and load containing the orders you wish to confirm. An LOV is available in both fields. This is only prompted for if you *Choose By Route/Load*.
- **Owner:** The owner code of the orders you wish to confirm. Will default to the current owner
- **Order From/To:** The range of orders that you wish to confirm. An LOV is available in both fields. This is only prompted for if you *Choose By Order Number*.

The **Find Orders** button will trigger the population of orders in the table based on the selection criteria entered.

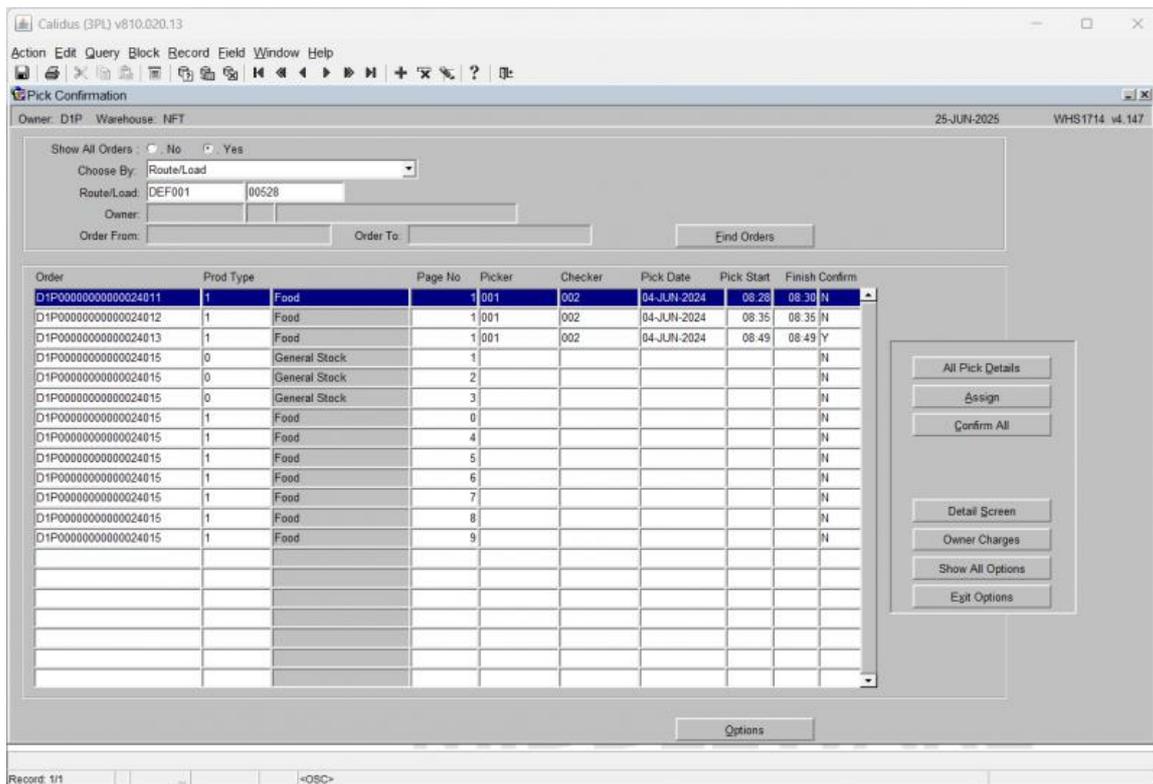
The table then displays:

- **Order:** Display only, the order number of the order to be confirmed
- **Prod Type:** the product type of the order line. Display only
- **Page No.** The pick list page number. Note, if a page number ?0? is seen, this is a zero allocation. Display only.
- **Picker:** The employee code of the person who picked the order. Must have been setup in employee codes maintenance.
- **Checker:** The employee code of the person who verified the picked order. Must have been setup in employee codes maintenance.
- **Pick Date:** The date the order was physically picked.
- **Pick Start:** The time the order started to be picked.
- **Finish:** The time the order pick was completed.



- **Confirm:** Displays the current confirmation status of the order - note it is possible to toggle this status between assigned and unconfirmed if you want to only assign certain lines.

When you click the **Options** button, the screen as shown is displayed.

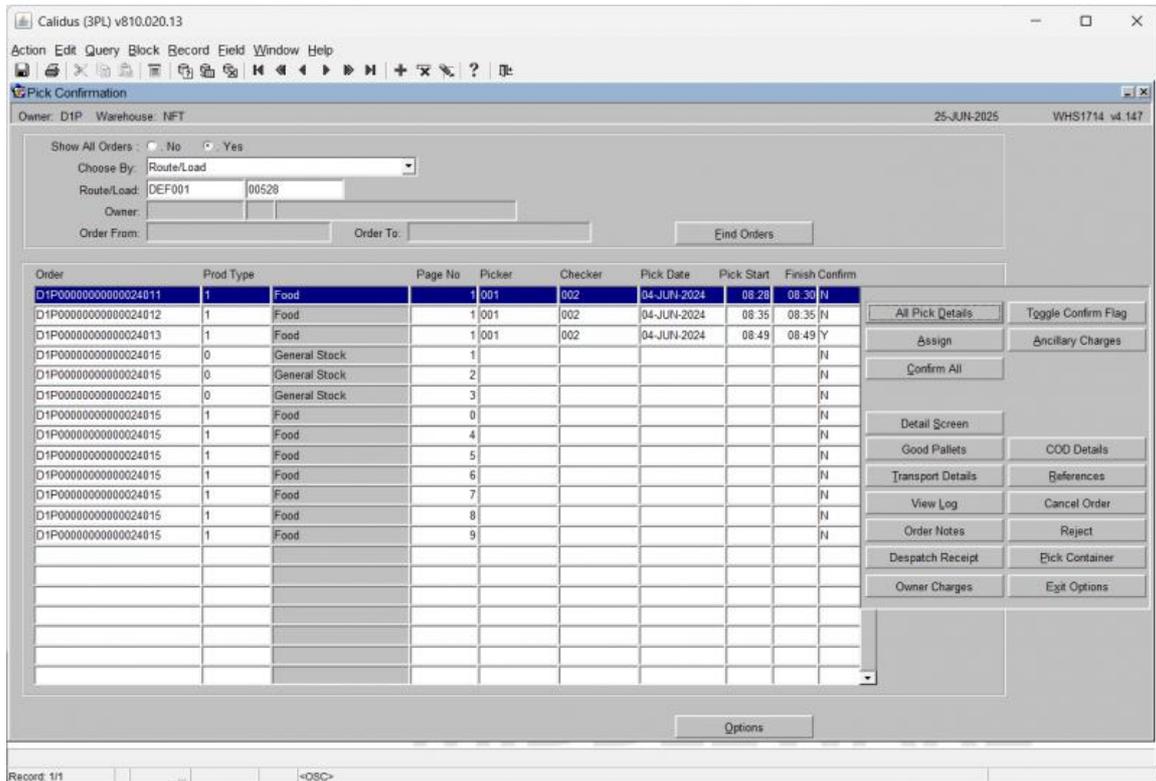


This gives you additional options during pick confirmation. Options are:-

- **All Pick Details:** This will display a popup screen allowing you to enter *Picker*, *Checker*, *Pick Date*, *Start* and *End* times for all lines. You can then **Enter** them or **Cancel** entry and return to the main screen.
- **Assign:** This flags the order as ready for confirmation.
- **Confirm All:** After confirmation, this option completes confirmation of all assigned orders.
- **Detail Screen:** Takes you into the order line level information to make amendments - see below for details.
- **Owner Charges:** This will take you to the Detail Handling Charges screen [WHS0168](#). Here you will be able to enter charges for the order.
- **Show All Options:** shows additional options - see below for details.
- **Exit Options:** Takes you back to the main screen.

When you click the **Show All Options** button the screen as shown is displayed.





This gives you additional options during pick confirmation. Options are:

- **Good Pallets:** Produces a pop up box to allow you to enter how many good and bad pallets are on the orders/route load. This information will be produced on the outbound documentation. You can also **Refresh** the automatically produced values here.
- **Transport Details:** The screen will display a pop-up window asking for entry of *Trailer No*, *Container Seal No*, *Freight Reference*, *Freight Charge Terms* (a DDL is provided) and the *Load Ref* for the selected orders. When entered, you can click **Return** to return to the main window.
- **View Log:** The screen will display a pop-up window showing a log of all the confirmation details that have been processed. You can browse through this (if there are any errors that need to be corrected) and return to the main window using the **Exit** button.
- **Order Notes:** The Customer Invoice and Delivery Details screen SOS1111 will display. This allows you to enter *Picking*, *Despatch* and *Carrier Instructions* for the selected order.
- **Despatch Receipt:** This will give you the option of printing labels for despatch receipt. You can select the number of labels required, then **Print**. If not required, you can **Close** to return to the main window.
- **Toggle Confirm Flag:** Changes individual lines from ?C? to ?N? and vice versa allowing the user to confirm specific order lines.
- **Ancillary Charges:** Allows you to enter additional charge information for the order(s). Note that you can only run this if the warehouse down-dates stock at pick confirmation. If not (i.e. it downdates at Despatch instead) then this option will not be allowed here.
- **COD Details:** Allow you to add or amend *COD Amount* and *Reference* information entered at order entry. When complete, you can click **Return** to return to the main window.
- **References:** The screen will display a popup window to enter the *Container Number* for the selected orders. When complete, you can click **Return** to return to the main window.
- **Cancel Order:** This option will cancel the selected order, after requesting confirmation from you. **Warning:** If Edi PICK messages are to be used, this will trigger a zero quantity cancellation pick message.
- **Reject:** As per the **Toggle Confirm Flag** button, this sets the status of all orders at status ?C? back to ?N?
- **Pick Container:** This displays a popup screen showing the container ID into which the goods have been picked. You can change this here. You can then **Save** or **Exit Without Saving**.

19.1 Pick List Confirmation Details (WHS1710A)

In this screen, you can make changes to the quantities picked.

Note, this screen can also be used to append an order line.



This means that if an employee has gone to the location but there is no stock, but has found alternative stock, they can zero off the original line and append a new pallet on.

This will zero the picked quantity in the original location and increase the amount in the new location.

NOTE, this will free the original stock.

If there is no stock there, or it is damaged, Stock Control should put this pallet on hold or adjust the pallet until an investigation can be carried out.

Otherwise the stock will be once more available for future orders.

In order to append a line, you need to click the + button in the toolbar. The cursor will then move to the next line for entry. The Line numbers must be sequential. The header information will be defaulted from the previous screen.

Line /Pallet	Stockist	Stock	Location /Check Digit	Rotation Customer Batch /Pallet	UOS / Weight	UOM	Pick Quantity / Alloc Quantity	Reason / Picked
1	D1P	SC01_119	A0042	4214			0/ 0	85
51310	001	Stock Code 119		4214	0.000	KGM	10/ 0	Y
				8945				
2	D1P	SC01_119	A0042	4214			10/ 0	
51311	001	Stock Code 119		4214	25.000	KGM	10/ 0	Y
				8946				

Field Information:

- **Line:** The line number of the order for this product / pallet combination. Display only unless appending a new line.
- **Pallet:** The system pallet id of the stock line to be confirmed / amended. Display only unless appending a new line.
- **Stockist:** The owner code and sub code of the stock line to be confirmed / amended. Display only unless appending a new line.
- **Stock:** The owner code and sub code of the stock line to be confirmed / amended. Display only unless appending a new line.
- **Location:** The location code of the stock line to be confirmed / amended. Display only unless appending a new line.
- **Check Digit:** Allows the user to enter check digits. Only enabled if check digits are turned on in System Parameters.
- **Rotation:** The system rotation of the stock line to be confirmed / amended. Display only unless appending a new line.
- **Customer Batch:** The customer rotation (batch) of the stock line to be confirmed / amended. Display only unless appending a new line.
- **Customer Pallet:** The customer's pallet ID (or SSCC ID) of the stock line to be confirmed/amended. Display only.
- **UOS:** The defined Unit of Sale for the customer. Display only.
- **Weight:** The weight of the item, and the weight unit (usually KGM). Display only.
- **UOM:** The Unit of Measure. Display only.
- **Pick Quantity:** The quantity to be pick confirmed. Note, this can be amended to a value equal or less than the



amount shown i.e. for a short pick of 1, the quantity above would be taken to 1.

- *Alloc Qty*: The quantity of stock allocated to the order. Any amendments can only be made up to this quantity. Display only.
- *Reason*: A reason code for the amendment of the pick quantity - the field will only be enabled if the pick quantity has been changed or if a new line is being appended.
- *Picked*: An indicator as to whether the line has already been marked as picked and confirmed.

Buttons:

- **Check Digits**: The **Check Digits** button will take you to the C/D field in order to enter check digits.
- **Catch Weight**: Allows you to enter the catch weights of each pallet (or carton) if required. Determined by the catch weight flag of the product in stock maintenance.
- **Pallet Exchange**: Allows you to 'substitute' one pallet for another (similar to substitution at pick confirmation.)
- **Confirm**: Pick confirms the specific page.
- **Serials**: Determined by the serial numbering flags on stock maintenance, this button will take you either to a serial number selection or entry screen. For more details on serial entry, see the Goods receipt user guide.
- **Return**: takes you back to the main pick confirmation page.



20 WHS1730 Pick Discrepancies

Here you can manage pick discrepancies.

This screen works similarly to the pick confirmation screen [WHS1714](#).

First, find an order by entering the Owner and Order Number - LOVs are provided.

Click the **Find** button and pick line details will be shown.

Here you can

- View the order line details, Picker and Checker of any line. Select the line and view in the right-hand panel.
- Set the *Picker*, *Checker*, *Pick Date*, *Start* and *Finish* times of all lines using the **All Pick Details** button.
- Reprint the pick list with the **Reprint PL** button.
- **Confirm** the order lines.



21 WHS1910 Despatch Confirmation

The despatch confirmation screen allows the user to despatch the order from the warehouse. In system terms, the stock will be removed from the marshalling location and warehouse. A negative stock transaction will take place with a type of 'SALE'.

Warning: This is an incomplete guide.

The screen is located in **Warehousing/Sales Allocation & Picking/Despatch by Route/Load**

The standard screen is shown below:

Order	Page Num	Pick Date	Marshall Locn	Qty to Despatch	Conf
D1P0000000000023905	1	18-JAN-2024	MA011	1/	0 N
D1P0000000000023906	1	18-JAN-2024	MA011	1/	0 N

The screen will begin by showing the *Orders* tab.

To despatch a route or order you must first select either *Carrier*, *Route/Load* or *Order Number* from the *Choose By* drop down box.

- If you select *Route/Load*, you will be prompted to enter the route and load. A lookup is provided that allows you to select unconfirmed or confirmed loads,
- If you select *Order Number*, you will be prompted for *Owner* and *Order*.
 - ◆ The *Owner* will default, but you can change this to another owner if you want to - an LOV is provided.
 - ◆ The *Order* provides an LOV to help you find the order you are after.
- If you select *Carrier*, you will be prompted to enter the carrier code. An LOV is provided.

Enter the carrier, route/load or order number you wish to despatch and press the **Execute Query** button. The screen will display matching records in the table below, as in the screenshot above, where this was selected by *Route/Load*.

The fields displayed are:

- *Order* (always displayed)
- *Route/Load*
- *Page Num*
- *Pick Date*
- *Marshall Locn*
- *Qty to Despatch*



- *Conf*
- *Route Code*
- *Load No*
- *Order Num*
- *Booked Date*

Note that you can change the fields in this table using the **Layout** button provided. You will be taken to the Program Layout Configuration screen [WHS0909](#) to select the fields, widths, order, etc.

You can view, enter or amend handling charges using the **Charges** button - you will be taken to the Detail Handling Charges screen [WHS0168](#), where you can automatically apply charges, produce a miscellaneous invoice or enter charges.

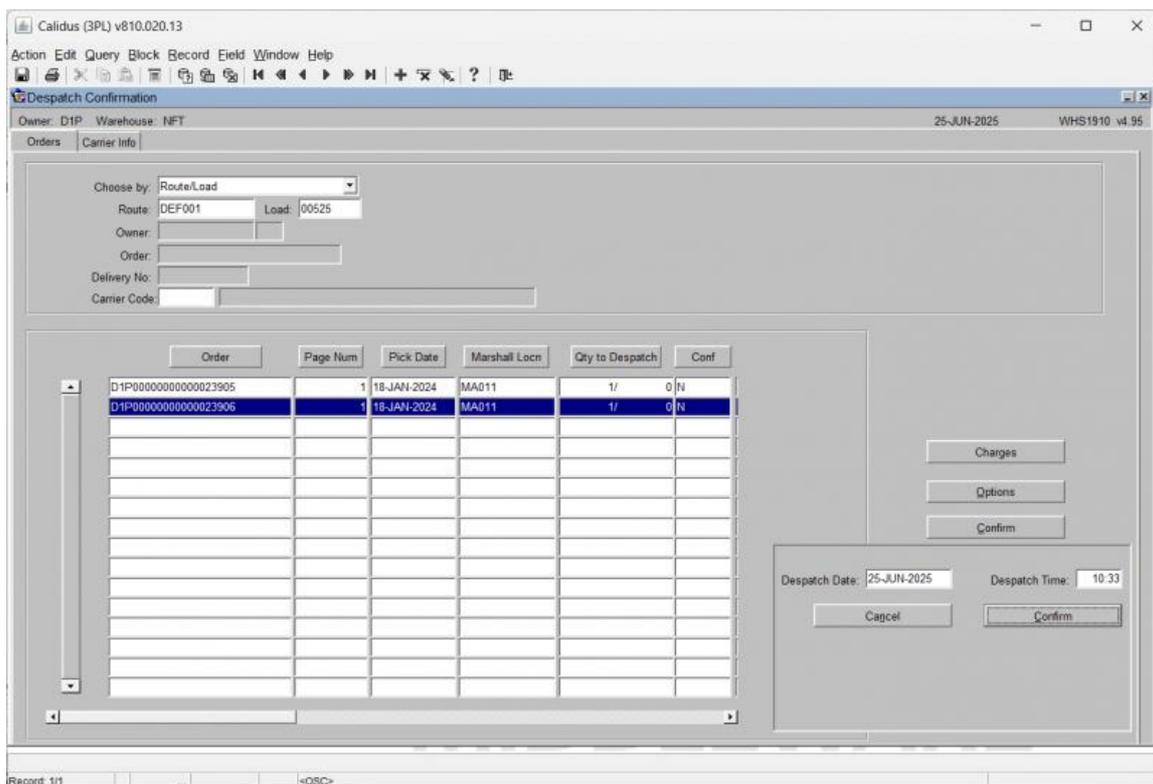
Further optional are available to you using the **Options** button, which will display a new panel of options:

- **Deassign Order** - this will deassign the selected order from this load. **Warning:** There is no confirmation when you press this - be sure this is what you want to do.
- **Delivery Refs**
- **Commercial Invoice Input**

You can close this panel with the **Exit Options** button provided.

To despatch the order, press the **Confirm** button.

The system will now require a date and time (these can be in the past). If you press the **TAB** key over each of the fields, the date and time will default to the current system date/time.



Press the **Confirm** button to confirm the despatch (you can cancel the despatch using the **Cancel** button). The screen will confirm that despatch confirmation is complete.

The order has now been despatched and will have a system status of 9.



22 WHS1942 Shipment Pallet Maintenance

This screen allows you to maintain shipment pallets created from packing.

Field Name	Description	Options
<i>Search By</i>	Determines how the selection of packages will be made. The next field will display the shipment pallet number related to the selection criteria	Pack List No Order Number Package Id Shipment Pallet
<i>Pack List No</i>	Displays the pack list no assigned to the shipment pallet	Display only
<i>Package Ref</i>	Displays the pack ref of the order assigned to the shipment pallet	Display only
<i>Pack Status</i>	Displays the pack status for the pack list	Display only
<i>Shipment Pallet</i>	The shipment pallet number the package is assigned to	Display only
<i>Pallet Location</i>	The default shipment pallet location the package has been stored in prior to despatch	Must have been created in location codes maintenance
<i>Interfaced</i>	Displays the interface status of the package as to whether the carrier interface has been populated (client specific)	Y or blank
<i>Order Number</i>	The order number relating to the package id	Display only
<i>Order Status</i>	The status of the order	Display only
<i>Invoice</i>	Determines whether a commercial invoice has been received for the order (client specific)	Y or blank
<i>Priority</i>	The order priority of the package - note, dependant on the settings for the sharing of order priorities, some order priorities cannot be mixed on a shipment pallet	Display only
<i>Carrier</i>	The carrier code of the order associated with the package id	Display only
Buttons	Description	Options
Add Package	Enables the user to add specific packages to the selected shipment pallet	A popup box will appear prompting for pack ref - LOV available



Buttons	Description	Options
Move Package	Allows the user to move selected packages onto other existing shipment pallets	-
Move Pallet	Moves all packages for this shipment pallet onto another existing shipment pallet	-
Close Pallet	Closes the shipment pallet ready for despatch	If using commercial invoice, the pallet cannot be closed until all packs for the pallet have received a commercial invoice
Despatch Pallet	Despatches the pallet and sets all related orders to status 9	No despatch documentation is produced

22.1 Shipment Pallet Details Tab (WHS1942)

Calidus (3PL) v810.020.13
Action Edit Query Block Record Field Window Help
Shipment Pallet Maintenance
Owner: D1P Warehouse: NFT 25-JUN-2025 WHS1942 v4 13

Search by: Packing List No 00000408

Package Ref: 0000040810002

Order Num	Line No	Order Status	Stockist Code	Sub Code	Stock Code	Rotation No	Pallet Id	Haz	Packed Cases	Packed Units
D1P00000000000018277	1	9	D1P	001	SC01			N	4	0

Buttons: Add Package, Move Package, Move Pallet, Close Pallet, Despatch Pallet

Record: 1/1

Field Name	Description	Options
<i>Order Num</i>	The order number of the selected pack ref	Display only
<i>Line No</i>	The order detail line no for the package	Display only
<i>Rotation No</i>	The system rotation (batch) for this package	Display only
<i>Pallet Id</i>	The system pallet id for this package	Display only
<i>Haz</i>	Displays a flag to determine whether the product on the package is hazardous or not	Y or N
<i>Packed Cases</i>	The quantity of cases for the pack ref	Display only
<i>Packed Units</i>	The quantity of units for the pack ref	Display only
<i>Stockist Code/Sub Code</i>	The owner code and sub code of the order	Display only
<i>Stock Code</i>	The product code of the goods packed on this pack ref	Display only



23 WHS1944 Pack Parameter Maintenance

The Order Packing Maintenance screen allows for the parameters for the packing screen to be defined, including user prompts and formatting of any documentation that will be produced from the system.

Field Name	Description	Options	Generic Value
<i>Stockist Code</i>	The Owner code for the packing operation	LOV available to select a valid owner code	Will default to the working Owner Code
<i>Single Order Packing **</i>	Whether to allow multiple orders to be packed together	Yes or No	Defined by client (Normally Yes)
<i>Status Flag **</i>	Orders status to allow packing	Pick List Pick Confirmed Pick Confirmed with Order Priority Defined by client	
<i>Order Validation **</i>	Whether to allow the order to be sent to the customer short packed	Prompt on Closure Force Full Order Pack Allow Short Order Pack Defined by client	
<i>Lane Capture **</i>	To capture who or where the order was packed for auditing	Location User Id Not Required Defined by client	
<i>References **</i>	How to generate reference numbers for the pack	Generate	



Field Name	Description	Options	Generic Value
		Manual Not Required Defined by client	
<i>Default Pack Levels **</i>	Number of levels that you can pack down to i.e. a pack within a pack would have a level of 2	1-9	Defined by client
<i>Default Pack Type **</i>	How to select and identify the product for packing	By Order By Order Line By Pallet By Rotation By Stock Code Defined by client	
<i>Default Pack Details **</i>	Whether capture packing details	Yes or No	Defined by client (default is Yes)
<i>Weight Capture **</i>	To indicate whether weight is to be automatically calculated and displayed for the pack. Net weight is the sum of the stock packed, and the gross weight is the sum of the stock packed plus the weight of the package type.	Yes or No	Defined by client
<i>Packing List Required **</i>	Indicate whether a pick list is to be produced and if so how	Auto Print List Multiple Copies Do Not Print List Auto Print Multiple Copies Print List Defined by client	
<i>Interface Required **</i>	Functionality not migrated	Yes or No	Defined by client
<i>Detail Label Required **</i>	To produce Detailed Labels and at what level	Print at all Levels Do Not Print Labels Print Labels Defined by client	
<i>Package Label Required **</i>	To produce Package Labels and at what level	Print at all Levels Do Not Print Labels Print Labels Defined by client	
<i>Auto Package Label Production **</i>	Whether the user is to be prompted to manually generate Package Labels or for the system to automatically produce the labels	Yes or No	Defined by client
<i>Streamlined Entry **</i>	Designed to move the user through both the header and the detail packing screens with the minimum of data entry	Yes or No	Defined by client
<i>Allow Consolidated Pallets **</i>	Functionality not migrated	Yes or No	Defined by client
<i>Generate Carrier Labels **</i>	Whether a carrier label is to be produced	Yes or No	Defined by client
<i>Stop Short Packing</i>	Whether an order can be short packed	Yes or No	Defined by client
<i>Use Consumable Containers</i>	Does the client require/allow the use of consumable containers?	Yes or No	Defined by client
<i>Pack Before Despatch</i>	Must pack be completed before despatch confirmation is allowed?	Yes or No	Defined by client
<i>Validate Carrier</i>	Must the carrier be validated during packing?	Yes or No	Defined by client
<i>Reference</i>	Does the packing system require validation of SSCC IDs?	SSCC Validation	



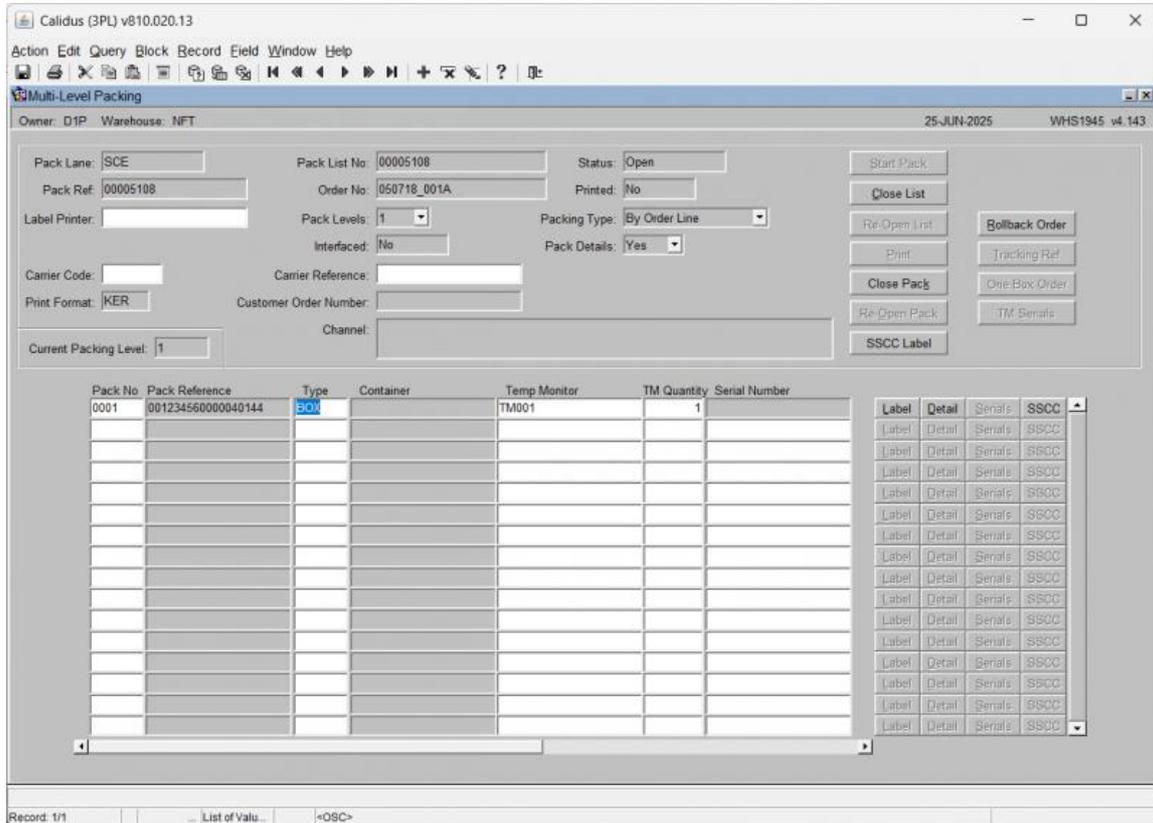
Field Name	Description	Options	Generic Value
<i>Validation</i>			
<i>Reopen Closed Pack List</i>	Is the user allowed to re-open a closed pack list?	Yes or No	
<i>Volume Capture **</i>	To indicate whether volume is to be automatically calculated and displayed for the pack. The calculation is for the product only and does not include the package type.	Yes or No	Defined by client
<i>Packing List Format **</i>	Format of the Packing List	Formats Include - FWL (default) SIG (client specific) Defined by client if required	
<i>Interface Format</i>	Functionality not migrated	Formats Include - FWL (default)	Defined by client if required
<i>Detail Label Format</i>	Format of the Detailed Label	Formats Include - FWL (default)	Defined by client if required
<i>Package Label Format</i>	Format of the Package Label	Formats Include - FWL (default)	Defined by client if required
<i>Default Qty **</i>	Whether to pack by the pack type or by a case at a time.	Remaining to Pack Single Case	Defined by client
<i>Detail Packing Format</i>	Format of the Detailed Packing List	Formats Include - FWL (default) SIG (client specific) Defined by client if required	
<i>Auto Close</i>	If set to Yes, the system will automatically close the pack once the final product has been packed. Dependent on printing requirements and setup, labels and notes will also be automatically produced.	Yes or No	Defined by client
<i>Carrier Required **</i>	If set to yes the user will be prompted to add a Carrier Code and Carrier Reference, another screen will be displayed displaying a list of carrier codes and services to be selected from, if required carrier labels can also be produced. (Client specific)	Yes or No	Defined by client (default is No)
<i>Default Package Type</i>	A value must be entered if packing with RF	LOV on Pallet Types	Defined by client if required
<i>Use Consumable Temp Monitors</i>			
<i>One Box Order</i>		Yes or No	



24 WHS1945 Multi-level Packing

As an optional process it is also possible to capture packing details for an order, which includes reference or tracking numbers, production of specific carrier labels, interfacing to external systems including carrier systems and the production of all required packing notes at different packing levels.

Dependent on the values set in the **Order Packing Maintenance** certain parameters will automatically be set when the user enters the Packing Screen.



Field Name	Description	Options
<i>Pack Lane</i>	Specifies which pack lane the order will be packed into. Note, this field is system generated and no entry is allowed.	Pack lane population is specified by the setup in packing parameters maintenance -
<i>Pack Ref</i>	Depends on the number of levels of packing, the pack ref will be populated with the reference number of the outside carton. This will be system generated. Entry will only be allowed if querying a previously entered pack.	The generation of the pack ref is specified by the setup in packing parameters maintenance
<i>Pack List No</i>	A unique system generated pack list number. Entry will only be allowed if querying a previously entered pack.	Based on the last number type ?PACK? in warehouse document numbering maintenance
<i>Order No</i>	The order number to be packed	Note, the order number will only be enabled if packing is set to ?single order packing? in packing parameters maintenance
<i>Printed</i>	Has the pack list been printed?	Y or N - display only
<i>Label Printer</i>	The defined label printer for pack labels at this station.	May default. An LOV is provided to select a printer.
<i>Pack Levels</i>	The number of different sub levels of packing i.e. carton within a box within a crate etc	1 - 9 - number of packing level determined by the default pack levels flag in packing parameters maintenance
<i>Packing Type</i>	How the goods will be packed. Note, if despatching by shipment pallet, this has to be set to ?By Pallet?	By Order Line By Stock Code By Pallet By Rotation - determined by the default pack levels



Field Name	Description	Options
		flag in packing parameters maintenance
<i>Interfaced</i>	Used for client specific functionality to determine whether a pack has been scanned through the transport system and the relevant edi file uploaded	Y or N - display only
<i>Pack Details</i>	Specifies whether you require detail level packing information	Y or N - determined by the default pack levels flag in packing parameters maintenance
<i>Carrier Code</i>	If carrier information is required, the carrier code.	
<i>Carrier Reference</i>	If carrier information is required, the carrier reference.	
<i>Print Format</i>	The Pack List format being used	Defaulted from settings
<i>Customer Order Number</i>	The customer's order number for the order selected	Display only.
<i>Pack No</i>	The number of detail records for the pack. This will be system generated by the number of pack references generated.	0001 - 9999
<i>Pack Reference</i>	The pack ref will be populated with the reference number of the outside carton. This will be system generated. Entry will only be allowed if querying a previously entered pack.	The pack ref will either be populated with the SSCC number if used or a sequential number based on the pack list no.
<i>Type</i>	The package type the goods will be packed into Based on pallet types.	Must have been created in pallet types maintenance - LOV available
<i>Container</i>		
<i>Temperature Monitor</i>	If temperature monitors are required, the TM Type.	An LOV is provided
<i>TM Quantity</i>	If temperature monitoring is required, the quantity of TMs.	
<i>Serial Number</i>	If unique TM monitoring is required, the serial number of the TM	
<i>Net</i>	The net weight of the pallet and products for this pack ref	System generated
<i>Gross</i>	The gross weight of the pallet and products for this pack ref	System generated
<i>Volume</i>	The volume of the pallet and the products associated with the pack ref.	System generated Based on the LxWxH of the products and the pallet type selected
<i>Packed Cases</i>	The quantity of cases to be packed based on the order detail records associated with the pack ref. System generated - will change if the packed quantities are amended.	Display only
<i>Packed Units</i>	The quantity of cases to be packed based on the order detail records associated with the pack ref. System generated - will change if the packed quantities are amended.	Display only
<i>Haz</i>	Field that displays whether the product(s) to be packed are hazardous or not	Y or N - based on the hazardous flag on stock maintenance - display only
<i>Full Pallet Pick</i>	Field that displays whether the quantity to be packed equals a full pallet	Y or blank - based on a calculation on quantity of cases to a pallet in stock maintenance
<i>Status</i>	The status of the pack. This will be updated when the user clicks ?Confirm Pack?	O - Open C - Closed
Buttons		
Label	Produces a label for the pack.	
Detail	Takes you to the detail (the contents) of the pack.	
Serials	If Serials are required for this stock code, this button will allow you to identify them.	
SSCC	If SSCC is required, this will allow you to enter the information.	
Button	Description	
Start Pack	Starts the packing process for the required order	
Close List	Sets the pack status to ?C? and enables the printing of the pack list and pack labels. If required, updates client specific tables with carrier information	
Re-Open List	If configured, allows you to re-open a closed pack list.	
Print	Allows you to reprint the pack list and pack labels if required	



Button	Description
Close Pack	Closes the specific pack selected
Re-open Pack	Sets the status of the pack back to ?O? and allows you to re-close the pack
SSCC Label	Allows you to print detail level labels if required
Detail	Takes you to the detail level screen
Rollback Order	Rollback the whole order so that you can start again.
Tracking Ref	The Tracking Reference
TM Serials	If required, shows you the Temperature Monitor serials.

The process is highly configurable and complex, and requires training.

In general, however, the process to pack an order is as follows:

- The screen automatically starts expecting you to enter a new order to pack.
 - ◆ If you want to find an existing order or pack list, click **Enter Query**, enter an order reference or known pack list number and then **Execute Query**.
- Enter an Order Reference - an LOV is available.
- The screen will display details of the order.
- Click **Start Pack** - you will start defining the box you are packing into.
 - ◆ The unique Pack No and pack reference will be generated for you.
 - ◆ You will be prompted to select the Pallet Type - an LOV will automatically show.
 - ◆ If temperature monitors are required, you will be forced to enter one now.
 - ◆ If Serial Numbers are required, you may enter them now.
- Optionally click
 - ◆ **Label** - print the pack label.
 - ◆ **SSCC** - enter SSCC information for the pack.
- Click **Detail** - this allows you to identify the lines packed and shows the Order Packing Detail screen WHS1946, below.
- Enter all details packed in this pack.
- Optionally enter any additional details such as serials.
- Optionally produce pack labels.
- Close the pack
- Create as many packs are required.
- Once complete, close the list.
- Print the packing list and pack labels as required.

24.1 Multi-Level Order Packing Detail (WHS1946)

Multi-level order packing allows you to break down lines across orders into a single pack.



Field Name	Description	Options
Pack No	The pack number the details are associated with	Display only
Box No.	Relates to line number in the header screen	Display only
Pack Ref	The pack reference (pack detail reference) of the pack header	Display only
Box Ref	The pack reference (pack detail reference) of the box	Display only
Status	The pack status - this will change from ?Open? to ?Closed? when the close button is pressed	Display only
Box Type	The description of the packing material. Will default to the description of the pallet type entered in the pack header screen	Display only
Order Num	The order number to be packed	Dependant on the ?pack by? flag will determine whether the order number will be displayed or entered
Order Line No	The line no of the product within the order detail record	Display only
Stockist Code/Sub Code	The owner code and sub code of the product within the order detail record	Display only
Stock Code	The stock code of the order to be packed. The description will also be displayed.	Display only
Rotation No	The rotation number (batch) of the product to be packed	Display only
Pallet Id	The pallet id to be packed	Dependant on the ?pack by? flag will determine whether the order number will be displayed or entered
Order Owner / sub code	The owner code and sub code of the product within the order detail record	Display only
Line ID	The Line ID	Display only
Packed Cases	Quantity of cases to be packed	Cannot exceed the total number of picked cases for the pallet
Packed Units	Quantity of units to be packed	Cannot exceed the total number of picked units for the pallet
Hazardous	Field that displays whether the product(s) to be packed	Y or N - based on the hazardous flag on stock



Field Name	Description	Options
	are hazardous or not	maintenance - display only
Buttons		
Serials	Takes the user to an additional screen in order to add/amend serial numbers for the product, if required	
Labels	Allows the user to print packing detail labels	
	Button	Description
	Re-Open Pack	Reopens the pack once closed to enable the user to make changes to the pack details
	Close	Closes the pack ready for the main pack to be closed
	Print SSCC	Print an SSCC label if required



25 WHS1956 Pick by Tote Box

This is the Pack by Tote Box screen.

This is specific to tote box

Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Pack By Tote Box

Owner: ROB Warehouse: NFT 27-JUN-2025 WHS1956 v4.3

Tote Box Reference
Order Number
Expected Number of Tote Boxes

Picking Container Id

Record: 1/1 <OSC>

picking.

Enter the *Tote Box Reference*.

The screen will identify the Order Number and the number of tote boxes. You may then identify the picking containers packed in the tote.



26 WHSORA010 Sales Order Allocation

To enable an order to be processed through the warehouse, the first step is to allocate stock to the order placed.

Allocation can be organised by a route/load number, by a specific order number or, by a range of order numbers.

The following screen details the information required to enable the allocation process to begin. You may also generate a pick list from here.

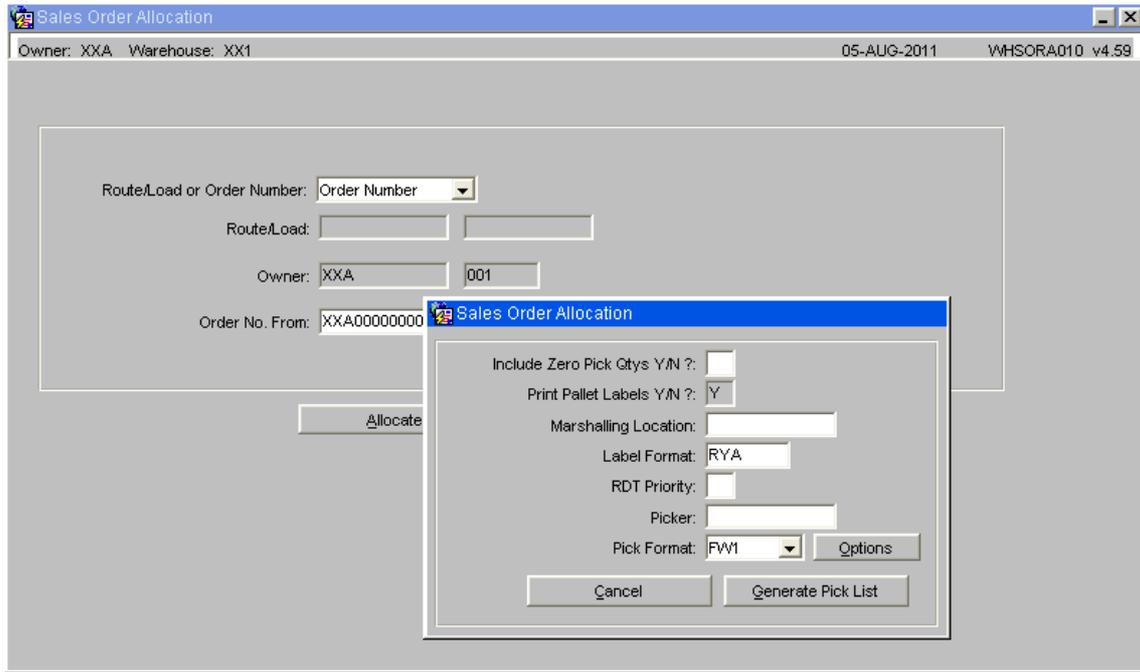
Note: The sequence in which stock is allocated is governed by the allocation rules as set up in Owner Maintenance.

Field Name	Description	Options
<i>Route/Load or Order Number</i>	Selection method dependent on how orders are allocated.	Note, as pick wave has the ability to allocate from its own screen, allocation will very rarely happen from here for a route/load.
<i>Route/Load</i>	If Route/Load is the selected method, enter the route and load number here. This option will disable <i>Order Number From / To</i> entry.	LOVs are available.
<i>Owner</i>	If <i>Order Number</i> is the selected method, enter the owner code. This option will disable <i>Route / Load</i> entry.	May default according to user profile; otherwise select.
<i>Order Number From / To</i>	Enter either a range of orders or a single order	LOV available
Reject Orders that require Replens	Whether orders that require replenishment moves will not be allocated in this run.	DDL, Options No (the default) or Yes
Buttons		
Allocate	Starts the Allocation process	
View Log	Allows the user to view a log file of the allocation process. The log file can be automatically sent to screen or called via the button. The options are controlled in Warehouse Set Up and Owner Ware Parameters	



Field Name	Description	Options
Force Alloc		

Dependent on the setting for Allocation Rule 4 in **Owner Maintenance** Sales Order Tab it is possible to run the pick list option once the allocation run has completed



Field Name	Description	Options
<i>Include Zero Picks</i>	Whether zero pick lines are to be included on the pick note	Yes/No
<i>Print Pallet Labels Y/N</i>	Are pallet labels to be produced	Yes/No, default is taken from Owner Maintenance / Format tab
<i>Marshalling Location</i>	The marshalling location the order or route load is to be picked to	Mandatory field, can be defaulted in (Location set in System Parameters or Owner Ware Parameters) or can be selected from a LOV. Must be a valid Marshalling Location
<i>Label Format</i>	If picking labels are required, enter the picking label format here.	
<i>RDT Priority</i>	If the WCS system is enabled for this warehouse, the RDT priority will be prompted for here.	
<i>Picker</i>	If the WCS system is enabled for this warehouse, the Picker will be able to be entered here, allocating these pick tasks directly to that picker.	An LOV is available.
<i>Pick Format:</i>	What pick list format is to be used.	Select from the DDL provided.
Buttons	Description	
Cancel	Cancel the pick list operation. This can then be run manually through the Pick List Generation screen	
Generate Pick List	Perform the pick list processing and generate the pick list. If WCS is enabled for this warehouse, the picking tasks will be interfaced to the system for picking.	
Options	Options for the pick format	



27 WHSORA200 Pick List for Partial Allocation

This is the Partial Allocation Pick List screen.

The screenshot displays the 'Pick List for Partial Allocation' window. At the top, there is a menu bar with 'Action', 'Edit', 'Query', 'Block', 'Record', 'Field', 'Window', and 'Help'. Below the menu bar, there are several input fields: 'Order Owner: ROB', 'Warehouse: NFT', 'Order Number: ROB00000000000022851', 'Pick List: 107162', and 'Allocation Date/Time: 03-AUG-2022 15:22:45'. There are also 'Options' and 'Run Reprint' buttons. The main area contains a table with the following columns: 'Pick List', 'Allocation Date/Time', 'RDT Sent', 'Pick Cases', 'Pick Units', and 'Stock Cod'. The first row shows '107162', '03/08/2022 15:22:45', 'Y', '1', '0', and 'SC01'. A 'Pick Print Default Options For' dialog box is open, showing options for 'FW1'. The dialog box has the following options: 'Consolidation Option: Non-Consolidated', 'Sort Order: Order Line/ System Rotation/ Pallet Id', 'Quantity Display: Cases & Units', and 'Additional Quantity Display: None'. There is a 'Done' button at the bottom of the dialog box. At the bottom of the window, it says 'Record: 1/1' and '<-OSC>'. The title bar of the window says 'Calidus (3PL) v810.020.13'.

Here, you can find orders and choose to partially pick list them, by page.

First enter the following:

- *Order Owner* - this will default, and an LOV is available to change.
- *Order Number* - an LOV is available.
- *Pick List* an LOV is available of all pick lists for the order.

Once entered, the screen will display the *Allocation Date/Time*.

You can then set the options you want using the **Options** button:

- *Pick Print Default Options for* - This shows the format for which the options are being configured, as selected in the previous window.
- *Consolidation Option* - Select from a DDL, options:
 - ◆ *Non-Consolidated* (the default)
 - ◆ *Consolidated*
- *Sort Order* - How the orders are sorted. Select from the DDL provided:
 - ◆ *Order Line/System Rotation/Pallet ID*
 - ◆ *Product Type/Stock Code/System Rotation/Pallet ID*
 - ◆ *Aisle Seq/Pick Seq/Order Line/System Rotation/Pallet ID*
 - ◆ *Aisle Seq/Pick Seq/Product Type/Stock Code/System Rotation/Pallet ID*
- *Quantity Display* - How pick quantities are displayed. Select from the DDL provided:
 - ◆ *Cases & Units*
 - ◆ *Unit Equivalent Quantity*
- *Additional Quantity Display* - Whether and how additional quantities are displayed. Select from the DDL provided:
 - ◆ *None* (the default)
 - ◆ *Volume and Weight (Net)*
 - ◆ *Volume and Weight (Gross)*

Once selected, click **Done**.



You can then reprint the pick list with **Run Reprint**.

