Sales Order Process

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1 Sales Order Process

This document is intended to show the full Sales Order operational processes within the Calidus WMS 3PL system. This includes optional processes and alternative mechanisms of taking the orders through each stage.

1.1 SOP Flow Within the Warehouse - Order Status

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



2 Standard Sales Order Process

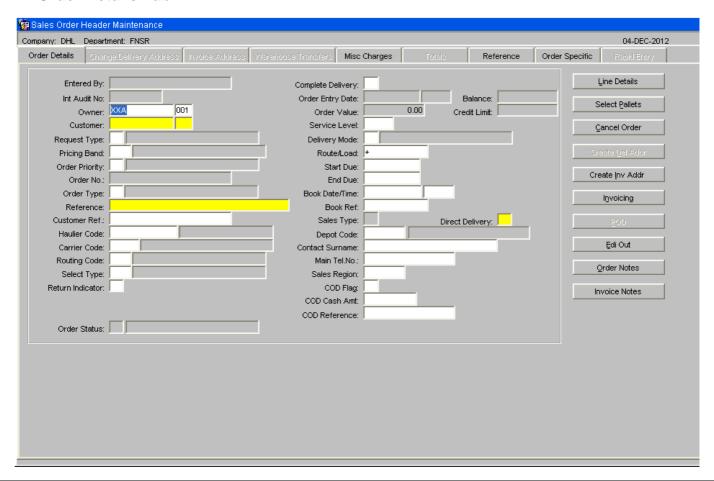
2.1 Sales Order Entry (SOS1110)

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.

2.1.1 Order Details Tab



Field Name	Description	Options
Entered By		No entry allowed - will default to the login id
Int Audit No	The internal system generated audit number	No entry allowed - system generated
		Must have been set up in owner maintenance - LOV available
Customer **		Must have been set up in customer maintenance - LOV available
	Ine type of order - this will determine what processing can be used	S - Sales Order (default) C - Collection Order
Pricing Band	Used for invoicing (not migrated)	Blank
Priority **		Must have been set up in order priority maintenance - LOV available



Field Name	Description	Options
	express order and a warning message will appear notifying you the system will default the order priority to ?1? for express orders	
Order No **	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
	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	
Reference **	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
	An additional customer reference that relates to this order (not mandatory or validated)	20 character free text field
Haulier Code	The haulier code for the order	Must have been created in haulier maintenance
	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
Routing Code	Client specific functionality for Ihub/Ohub functionality and auto carrier population - not migrated	N/A
	• • •	N/A
	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
Order Status		 1 - Committed 4 - Allocated 5 - On pick list 6 - Pick Confirmed F - Awaiting POD Confirmation 9 - Complete I - Invoiced
Complete Delivery	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
-	This field is for information only and indicates when the order was created.	N/A
Dalarice	outstanding on the order.	N/A
Order value	value.	N/A
Crean Limit	customer?s credit ilmit.	N/A
	the carrier?s service level this order needs to be delivered on	Must have been created in service level maintenance
Delivery	Indicates how this order will be delivered. Note, if you enter ?T?	T - trunking



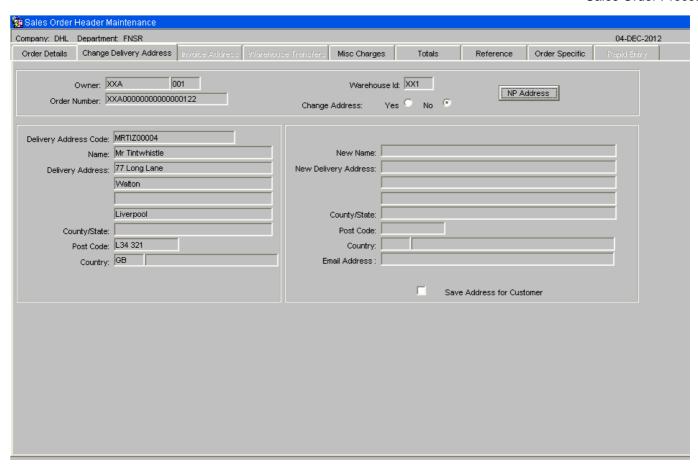
Field Name	Description	Options
Mode **	the order will be designated as a trunking order and will have to be despatched through the trunking screen	D - direct order
Route/Load	If the customer code contains a postcode linked to routing information then a route/load can be selected. Will default to the 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
Start Due	The date the order is due to be delivered	Must be a valid date
End Due	The last date the order has to be delivered by	Must be a valid date
Book date/Time	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
Book Ref	If the order is to be delivered as a booking, enter the booking reference	10 character free text field or left blank
Sales Type	Used for client specific telesales functionality - not migrated	Will default to ?I? no entry allowed
Direct Delivery	An additional field used specify whether orders will be delivered direct to the end point - not migrated	Will default to ?N?
Contact Surname	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
Phone	The telephone number of the customer receiving the order	15 character free text field or left blank
Sales Region	Used in load allocation functionality to specify a route load (not migrated)	N/A
COD Flag	Determines whether the order is ?cash on delivery? - if yes, the information entered will appear on the waybill and the IFTMIN edimessage	Y, N or left blank
COD Cash Amount	If a COD order, the amount of money to be paid - will appear on the waybill and the IFTMIN	0 - 9999999.99
COD Reference	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

2.1.2 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.



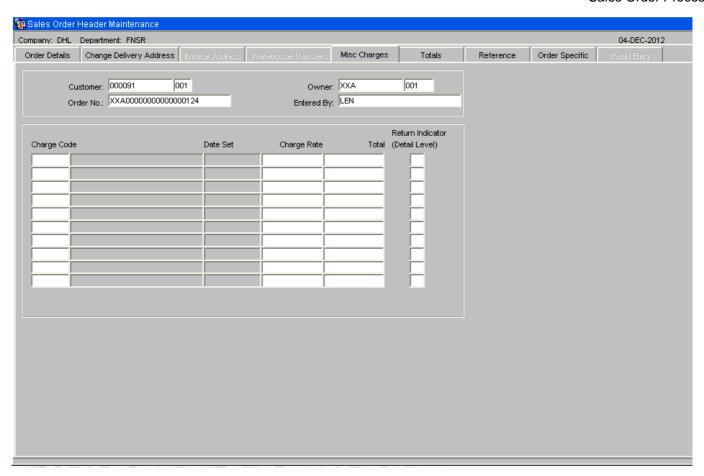


Field Name	Description	Options
New Name **	Enter the new name of the customer	35 character free text field
New Delivery Address **	Enter up to three address lines, excluding the county or state; lines 1 & 2 are mandatory	3 lines of up to 35 characters per line
County / State	Enter the county or state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

2.1.3 Miscellaneous Charges Tab

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



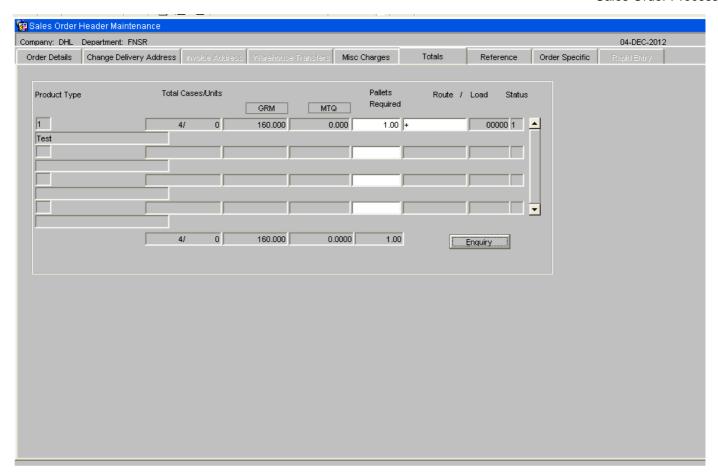


Field Name	Description	Options
Charge Code **		Must have been created in charge codes maintenance - LOV available
Charge Rate **		Will default to the rate set against the charge code
Total	The total charges raised against the order	System generated calculation
	Specifies at order detail level whether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

2.1.4 Totals Tab

This screen displays the totals per product type on the order



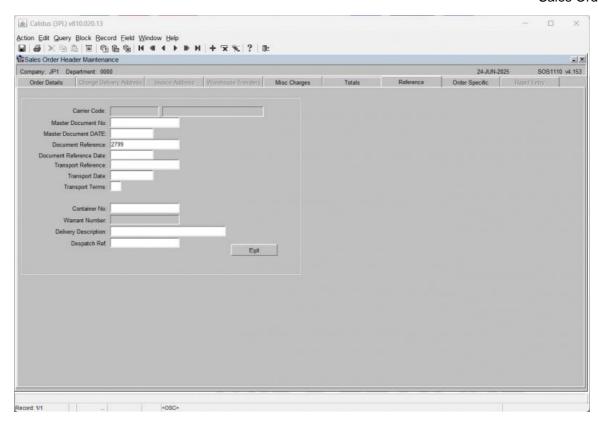


Field Name	Description	Options
Product Type	The product type of the order detail line.	
Total Cases/Units	The total number of cases and units for that product type.	
Total Weight	The total weight of the products under that product type .	
Total Volume	The total volume of the products for that product type .	
Pallets Required	Uses the same calculation as the number of pallets required for the IFTMBF based on the number of cases per product on a pallet.	
Route	Will display the defaulted route code for that customer - this can be changed at a detail level. If the order has been assigned to a load in pick wave, the load number will display also.	
Status	Displays the current status of the order .	
Buttons		
Enquiry	The Enquiry button will take the user to the sales order enquiry screen ENQSOON01A.	

2.1.5 Reference Tab

Allows the user to enter reference text for documentation relating to the order





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

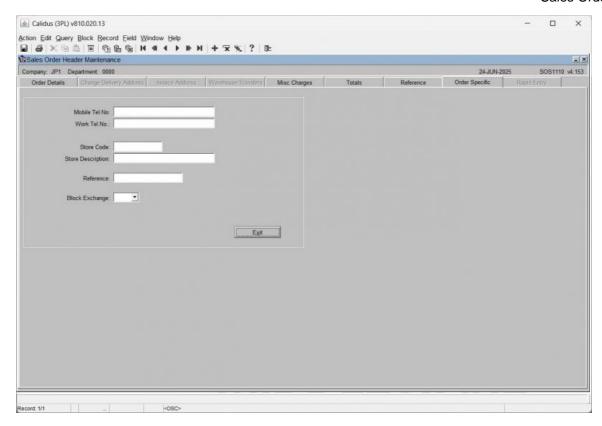
Warrant Number Delivery Description Despatch Ref **Buttons**

Exit Return to the Order Details tab

2.1.6 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	

2.1.7 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 Description

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

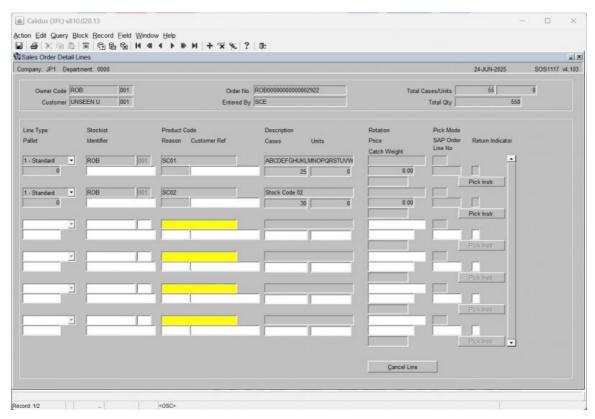
Notes SOS1135.

2.1.8 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
Line Type	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).
Stockist	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.	
Product Code	The product code and description of the stock being order.	Must have been setup in Stock Codes Maintenance.
Description	The description of the product selected	display only
Rotation	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
Pick Mode	The picking mode to be used if pallet levelling is in operation (not used)	
Pallet	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 .
Identifier	If using line type ?5? the Identifier field will become enabled for you to order by customer rotation.	
Reason		



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

maintenance.

Must have been setup in reason codes

Will default to returns matrix for detail level

text on the returns form.

(not migrated)

Customer Ref A customer specific reference number for the order.

Cases The quantity of cases to be ordered.

If the two unit of measure flag is set to ?Y? in owner

Units maintenance, the units field will become enabled. The user

can then order in either cases or units.

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.

SAP Order Client specific functionality to uniquely identify the order line

Line No: (used for outbound commercial invoice.

Return Indicator Check this box to indicate if this item can be returned.

Buttons

Price

The **Pick Instr.** Button takes the user to an additional pop-up

Pick Instr. 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.

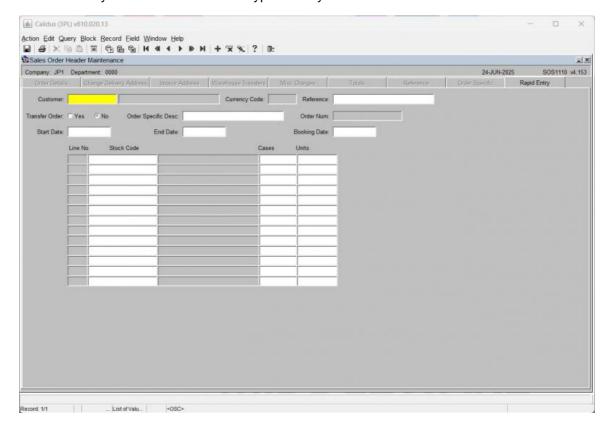
You can exit back to the Sales Order Header maintenance screen using the **Exit** toolbar button, the **X** in the corner of the screen or by pressing F4.

2.1.9 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
Customer Code	The customer code	An LOV is available
Reference	The customer reference	
Transfer Order	Whether this is considered a transfer order	Option select - Yes or No, defaulting to No
Order Specific Desc	An order specific description field - an alternative reference.	
Start Date	Start Date, End Date and Booking Date will all default to the current system date as you tab through them, but can be modified.	
End Date	Start Date, End Date and Booking Date will all default to the current system date as you tab through them, but can be modified.	
Booking Date	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 heade	r section has been completed then you must enter in the stock details,	

Name	Description	Options
Line No	The unique order line number.	This is automatically generated for you when the line is created.
Stock Code	The stock being ordered.	An LOV is available
Code	The description of the stock code is displayed once selected	
Cases	The quantity of cases to be ordered.	Enter as required
Units	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

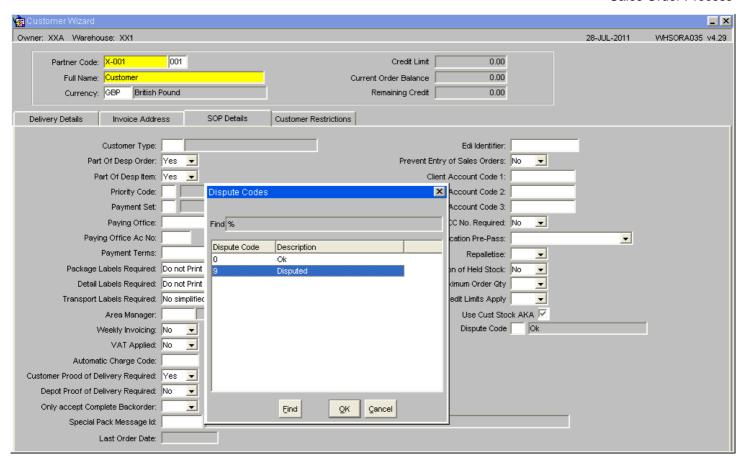
Once complete, the order will then be moved through the system via the normal processes.

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).

2.1.10 Additional Functionality within Rapid Order Entry

Placing orders automatically on Hold dependent on customer authorisation





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 in to the standard order entry screen.

2.2 Order Allocation

Orders can be allocated via either the Pick Wave Maintenance or from the Order Allocation screen.

2.2.1 Sales Order Allocation (WHSORA010)

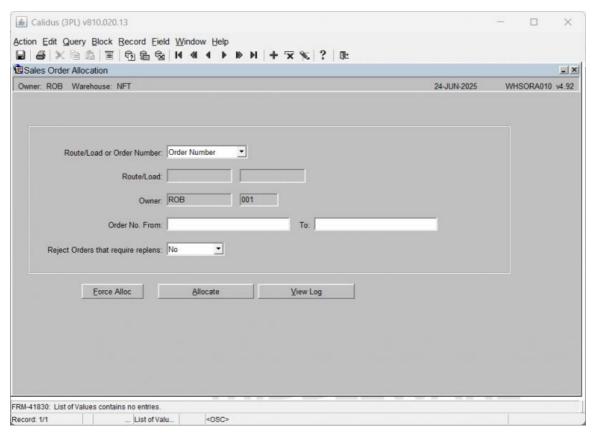
To enable an order to be processed through the warehouse, the first step is to allocate stock to the order placed.

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.

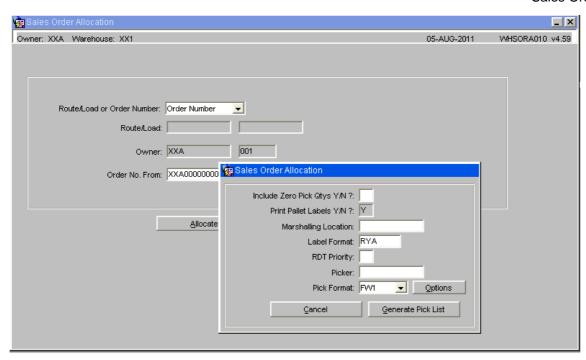




Field Name	Description	Options
Route/Load or Order Number	Selection method dependent on how orders are allocated.	Note, as pick wave has the ability to allocate from its own screen, allocation will very rarely happen from here for a route/load.
Route/Load	If Route/Load is the selected method, enter the route and load number here. This option will disable <i>Order Number From / To</i> entry.	LOVs are available.
Owner	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.
Order Number From / To	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	
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





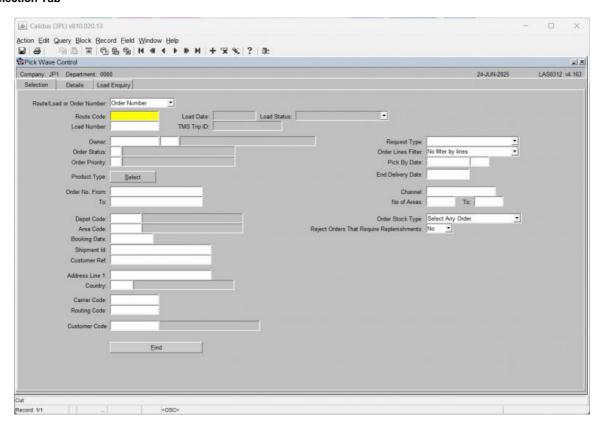
Field Nar	ne	Description	Options
Include Zero Pic	ks	Whether zero pick lines are to be inclueded on the pick note	Yes/No
Print Pallet Labels Y/N		IAra nallat lahale to ha producad	Yes/No, default is taken from Owner Maintenance / Format tab
Marshalling Loca	ation	The marshalling location the order or 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
Label Format		If picking labels are required, enter the picking label format here.	
RDT Priority		If the WCS system is enabled for this warehouse, the RDT priority will be prompted for here.	
Picker		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.
Pick Format:		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		

2.2.1.1 Pick Wave Maintenance (LAS0312)

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.



2.2.1.1.1 Selection Tab



Field Name	Description	Options
Route/Load or Order Number	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 - Route/Load or Order Number
Route **	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.
Load Date	The date of the load that was generated	Only enabled when selecting by Route/Load.
Load Status	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>
Load	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.
TMS Trip ID	If CTMS is being used, then the TMS trip ID can be provided here instead of the load number.	Only enabled when selecting by Route/Load.
Owner **	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
Order Status	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
Order Priority	Allows the user to select orders based on the order priority	Must have been created in order priority maintenance - LOV available
Product Type	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.

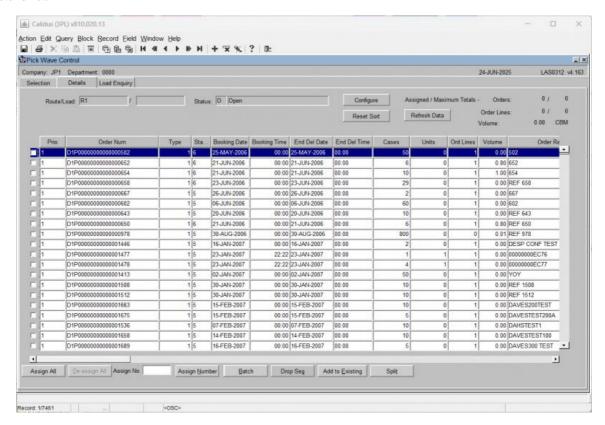


Field Name		Description	Options
Field Name		Description	These must have been created in product types
			maintenance Tick boxess are provided to select multiple product types
Order No. From / To	Allows the us number rang	ser to select orders within an order e	An LOV is available
Depot Code	The Depot C if selected	ode of the Order, and he description	An LOV is available
Area Code		r where the stock is to be picked e 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
Booking Date	The booking	date of the order	Display only, note, the orders will be sequenced by booking date then order number order
Shipment id	Shipment id	of the order	Free text field
Customer Ref	reference fie		-
Address Line 1		ser to select orders on the address stomers address	-
Country	Country Cod	e	LOV on valid country codes
Carrier Code		ser to select orders on the carrier order entered in order maintenance	Must have been created in carrier codes maintenance - LOV available
Routing Code		ser to select orders on the routing I in order maintenance	Must have been created in routing codes maintenance - LOV available
Customer Code		ser to select orders on the customer order entered in order maintenance.	An LOV is available.
Request Type		ser to select orders on the select type der maintenance	Must have been created in select types maintenance - LOV available
Order Lines Filter		eria for single or multiple line orders cking speeds	Select from the DDL provided: • No Filter by Lines • Single Line Orders • Multiple Line Orders Only • Multiple Line Single Product Type • Multiple Line an Product Types
Pick By Date	The Pick By	Date on the order header.	Valid date
End Delivery Date	The End Del	ivery Date on the order header	Valid date
Channel	1		
No of Areas			Select from the DDL provided: • Select Any Order • Unit Pick (Whole Orders)
Order Stock Type			 Case Picks (Whole Orders) Mixed Orders (Whole Orders) Case Picks (Product Type) Unit Picks (Product Type) Mixed Orders (Product Type)
Reject orders that require			Select from options Yes or No (the default
replenishments			
Buttons Find		Description This button starts the process of finding the orders based on the selection criteria entered	Options -

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



2.2.1.1.2 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.

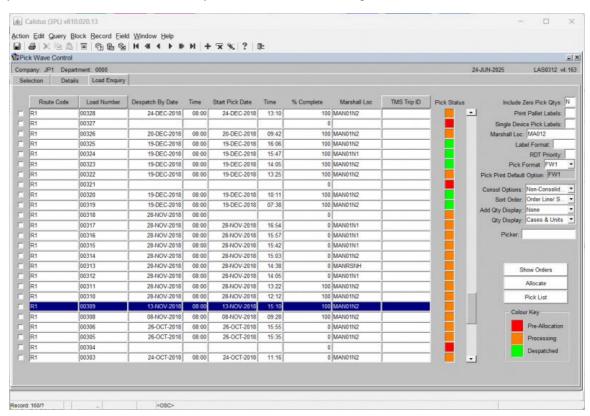
Display \	/alues	Description		Options
Assigned/ma totals	Assigned/maximum This field will display how many order lines have been assigned so far out of the maximum.			Display only, the maximum orders and order line levels are set in Owner Maintenance, Sales Order Tab
Orders		The total number of orders allowed for a reload	oute	Display only
Ord Lines		The total number of order lines for that ord	der	Display only
Buttons		Description		Options
Configure	To allow operation	the screen to be configured to a specific or user	scree	vill display the Program Layout Configuration n WHS0909, where you can select the columns lyed 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 Selection tab.			
Assign All	Allows the user to assign all orders selected to the			
Deassign All	Allows the user to de-assign all orders selected from the route load			
Assign Number				
Batch	will have	the number of orders entered in the	select Numb	re are a 100 orders displayed from the original tion criteria, if you then enter 10 into the Assign per field and select Assign Batch, then ten Pick s will be created each with 10 orders.



Buttons	Description	Options
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.	1
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.	

2.2.1.1.3 Load Enquiry Tab

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



Field Name	Description	Options
Route Code	The Route Code	
Load Number	The load number	
Despatch By Date/Time	When the orders on this pick wave are expected to be despatched.	
Start Pick Date/Time	When the orders on this pick wave are expected to start picking	
% Complete	The percentage complete of all of the lines/pages on the pick wave.	
Marshall Loc	The assigned marshalling location	
TMS Trip ID	The TMS Trip ID (if CTMS is in use).	
Pick Status	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 the selected load(s) using the options specified (see below)

Pick List the load(s) specified.

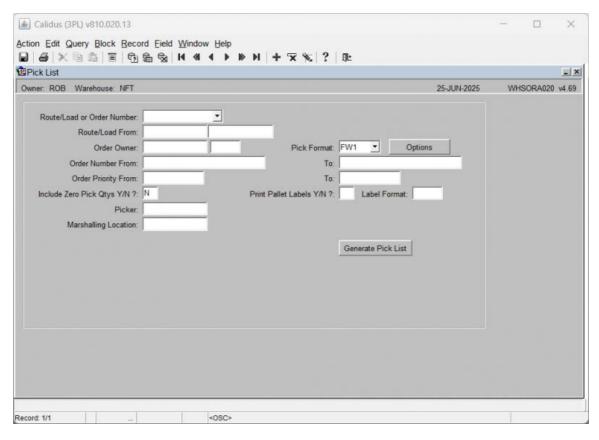
The options required for allocation and pick listing are generally defaulted from settings, but must be entered.

Field Name	Description	Options
Include Zero Pick Qtys	Whether zero pick lines are to be inclueded on the pick note	Yes/No
Print Pallet Labels	Are pallet labels to be produced	Yes/No, default is taken from Owner Maintenance / Format tab
Single Device Pick Labels	Whether a single device is used for all labels	Yes/No
Marshall Loc	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
Label Format	If picking labels are required, enter the picking label format here.	· ·
	What pick list format is to be used.	Select from the DDL provided.
Pick Print Default Option	The default pick list format for this owner.	Display Only
Connel	Whather and how to concelled a nick lines into	Select from the DDL Provided:
Consol Options	Whether and how to consolidate pick lines into picked pallets.	Non-Consolidated (the default)Consolidated
		Select from the DDL provided:
Sort Order	How the orders are sorted.	 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
		Select from the DDL provided:
Add Qty Display	Whether and how additional quantities are displayed	 None (the default) Volume and Weight (Net) Volume and Weight (Gross)
		Select from the DDL provided:
Qty Display	How pick quantities are displayed.	Cases & UnitsUnit Equivalent Quantity
Picker	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.
	and only to that plotter	

2.3 Pick List Report (WHSORA020)

If not sending an order to pick within the pick wave functionality, the Pick List screen can be used to produce the pick list print and advance the status of the order from ?4? to ?5?.





Field Information:

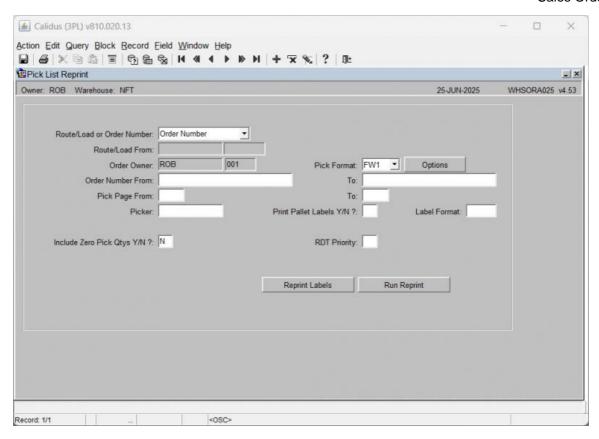
- Route/Load or Order Number. Select whether the process is to produce the pick list by order number sequence or route/load number. The selection criteria here will determine whether the Route/Load From or Order Number From/To fields are enabled.
- Order Owner. The owner code of the orders to be printed. This will default to current owner.
- Order Priority From/To: Allows you to select a subset of orders from within the method selected.
- Include Zero Pick Qtys Y/N?: Indicate if the pick list should contains lines that could not be allocated.
- *Picker*: For RF purposes, enables you to enter a valid employee code in order to send the order to a specific picker via RF.
- Marshalling Location: Allows you to define a different marshalling location to the default if required. Must have been set up as a use type ?6? location in Location Codes Maintenance.
- Pick Format. A pre defined pick list format hard coded. This will default to the pick format set up in Owner Maintenance
- Print Pallet Labels Y/N?: Specifies whether pick labels are to be produced. This will default to the value set in owner maintenance, format tab.
- Label Format. Select a format for the pick labels if required. This must be a pre defined hard coded label format.
- Generate Pick: Click the Generate Pick button to begin printing. This will take you through the printing process.

2.4 Pick List Reprint Report (WHSORA025)

This screen is used to re-generate a pick list again if required. This is only normally used if an error occurred at first print.

 \P Note: The order has to be status ?5? for this to work.





Field Information:

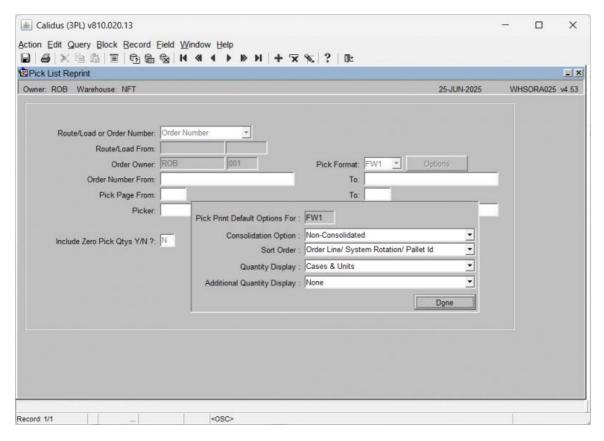
- Route/Load or Order Number: Select whether the user is to produce pick list by order number sequence or route/load number. The selection criteria here will determine whether the Route/Load From or Order Number From/To fields are enabled.
- Order Owner: The owner code of the orders to be printed. Will default to current owner .
- Pick Page From/To: Enables the user to select specific pages within a pick list.
- *Picker*. For RF purposes, enables the user to enter a valid employee code in order to send the order to a specific picker via RF.
- Include Zero Pick Qtys Y/N?: Indicate if the pick list should contains lines that could not be allocated .
- *Pick Format*: A pre defined pick list format hard coded. Will default to the pick format set up in Owner Maintenance .
- Print Pallet Labels Y/N?: Specifies whether pick labels are to be produced. Will default to the value set in owner maintenance, format tab.
- Label Format: Select a format for the pick labels if required. Must be a pre defined hard coded label format.
- RDT priority: used for RF purposes. Determines what the priority of this pick is in relation to others.

Buttons:

- Reprint Labels this reprints the labels associated to the selected orders or route/load, in the label format selected.
- Run Report this re-runs the pick list in the format selected.
- Options this allows you to specify some additional options for the standard format.

Additional options:





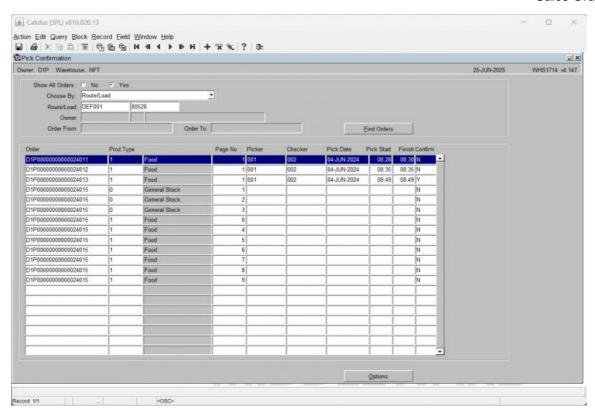
- Pick Print Default Options for This shows the format for which the options are being configured, as selected in the previous window.
- Consolidation Option Select from a DDL, options:
 - ♦ Non-Consolidated (the default)
 - ♦ Consolidated
- Sort Order How the orders are sorted. Select from the DDL provided:
 - ♦ 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)

2.5 Pick List Confirmation (WHS1714)

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.





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.

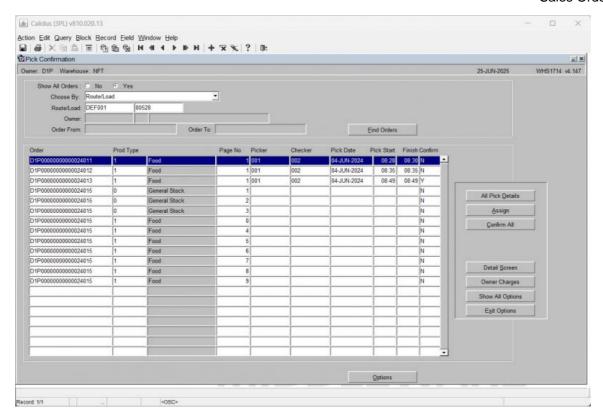
The **Find Orders** button will trigger the population of orders in the table based on the selection criteria entered.

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.



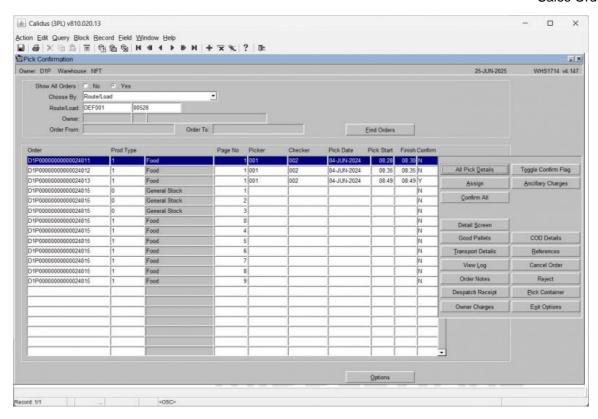


This gives you additional options during pick confirmation. Options are:-

- 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 conformation. 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**.

2.5.1 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.

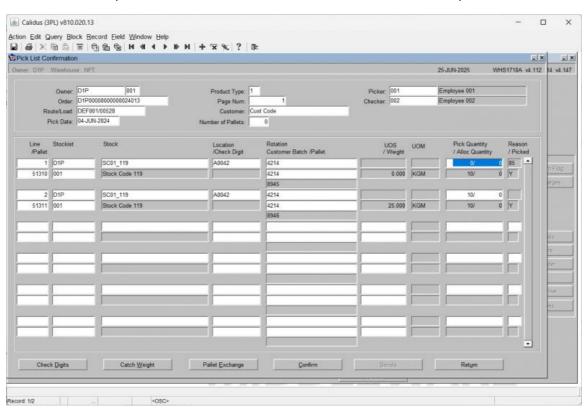
This will zero the picked quantity in the original location and increase the amount in the new location.

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.



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 cam be amended to a value equal or less that 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.

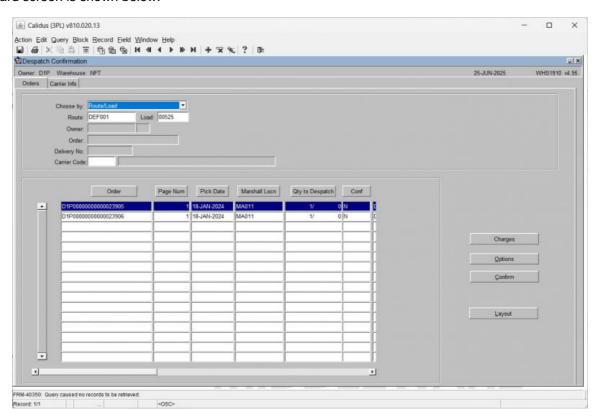
2.6 Despatch Confirmation (WHS1910)

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:



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:

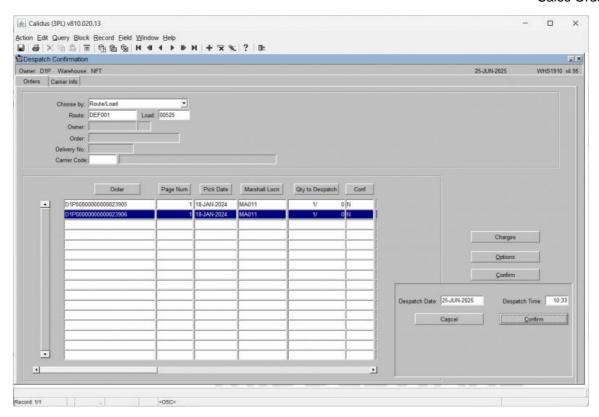
- Deassign Order this will deassign the selected order from this load. Warning: There is no confirmation when you press this be sure this is what you want to do.
- Delivery Refs
- Commercial Invoice Input

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.



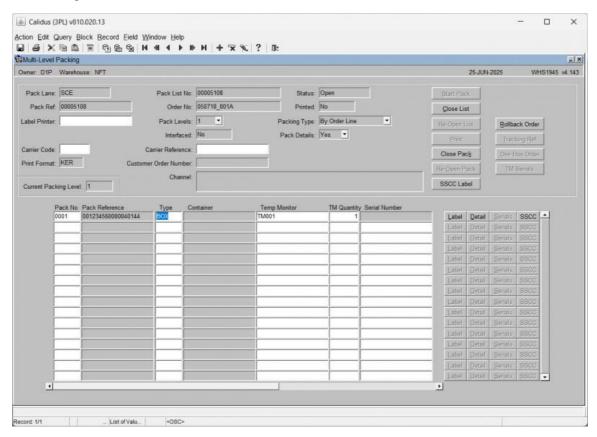
3 Optional Processes

In addition to the standard Sales Order Process there are also additional value added processes that can be enabled as required by the client.

3.1 Multi-Level Order Packing (WHS1945)

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
Pack Lane	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 -
Pack Ref	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
Pack List No	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
Order No	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
Printed	Has the pack list been printed?	Y or N - display only
Label Printer	The defined label printer for pack labels at this station.	May default. An LOV is provided to select a printer.
Pack Levels		



Field Name	Description	Options
	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 By Order Line
Packing Type		By Stock Code By Pallet By Rotation - determined by the default pack levels flag in packing parameters maintenance
Interfaced	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
Pack Details	Specifies whether you require detail level packing information	Y or N - determined by the default pack levels flag in packing parameters maintenance
Carrier Code	If carrier information is required, the carrier code.	
Carrier Reference	If carrier information is required, the carrier reference.	
Print Format	The Pack List format being used	Defaulted from settings
Customer Order Number	The customer's order number for the order selected	Display only.
Pack No	The number of detail records for the pack. This will be system generated by the number of pack references generated.	0001 - 9999
Pack Reference		The pack ref will either be populated with the SSCC number if used or a sequential number based on the pack list no.
Туре	The package type the goods will be packed into Based on pallet types.	Must have been created in pallet types maintenance - LOV available
Container		
Temperature Monitor	If temperature monitors are required, the TM Type.	An LOV is provided
TM Quantity	If temperature monitoring is required, the quantity of TMs.	
Serial Number	If unique TM monitoring is required, the serial number of the TM	
Net	The net weight of the pallet and products for this pack ref	System generated
Gross	The gross weight of the pallet and products for this pack ref	System generated
Volume		System generated Based on the LxWxH of the products and the pallet type selected
Packed Cases	The quantity of cases to be packed based on the order detail	Display only
Packed Units	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
Haz	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
Full Pallet Pick		Y or blank - based on a calculation on quantity of cases to a pallet in stock maintenance
Status	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.	



Field Name	Description	Options	
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		
	Sets the pack status to ?C? and enables the printing of the pack li- client specific tables with carrier information	st and pack labels. If required, updates	
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		
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.

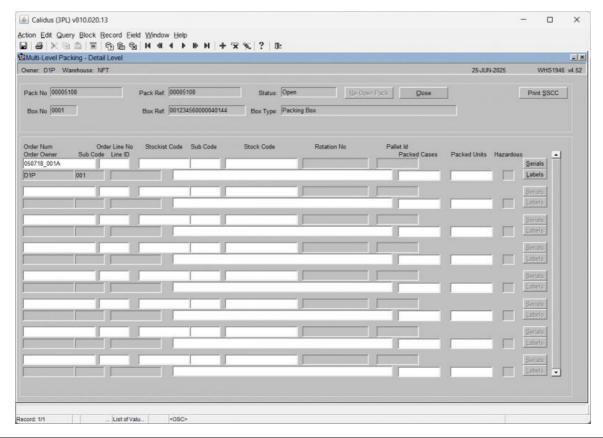
In general, however, the process to pack an order is as follows:

- 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.

3.1.1 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 ha		are ha	zardous or not	maintenance - display only
Button	Buttons			
Soriale			the user to an additional screen in order to nend serial numbers for the product, if required	
Labels A		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 deta		er to make changes to the pack details	
			•	

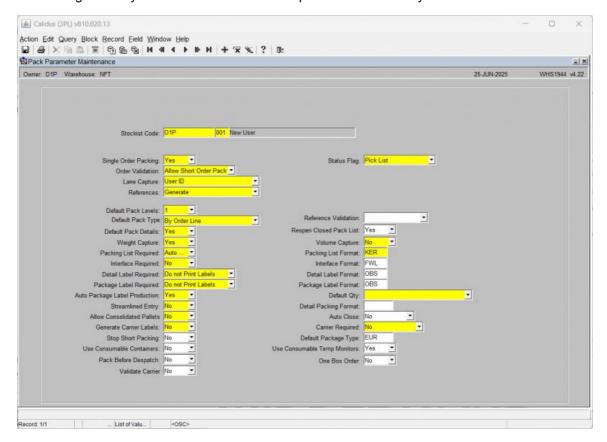
3.2 Order Packing Maintenance (WHS1944)

Print an SSCC label if required

Print SSCC

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

Closes the pack ready for the main pack to be closed



Field Name	Description	Options	Generic Value
Stockist Code	The Owner code for the packing operation	LOV available to select a	Will default to the working Owner Code
Single Order Packing **	Whether to allow multiple orders to be packed together		Defined by client (Normally Yes)
		Pick List	
Status Flag **	Orders status to allow packing	Pick Confirmed	
		Pick Confirmed with Order Priority Defined by client	
Order Validation		Prompt on Closure	
	short packed	Force Full Order Pack	



Field Name	Description	Options	Generic Value
		Allow Short Order Pack Defined by client	
	To capture who or where the order was packed for	Location User Id	
	auditing	Not Required Defined by	
		client Generate	
		Manual	
References **	How to generate reference numbers for the pack	Not Required Defined by client	
	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
		By Order	
Default Pack Type **	How to select and identify the product for packing	By Order Line By Pallet By Rotation	
<i>,</i>		By Stock Code Defined by client	
Default Pack Details **	Whether capture packing details	Yes or No	Defined by client (default is Yes)
	To indicate whether weight is to be automatically calulated 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
		Auto Print List	
Packing List Required **	Indicate whether a pick list is to be produced and if so how	Multiple Copies Do Not Print List Auto Print Multiple Copies	
		Print List Defined by client	
Interface Required **	Functionality not migrated	Yes or No	Defined by client
		Print at all Levels	
Detail Label Required **	To produce Detailed Labels and at what level	Do Not Print Labels	
rtoquirou		Print Labels Defined by client	
		Print at all Levels	
Package Label Required **	To produce Package Lables and at what level	Do Not Print Labels	
rtoquirou		Print Labels Defined by client	
Label Production	Whether the user is to be prompted to manually generate Package Labels or for the system to automatically produce the labels		Defined by client
	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
Allow	Functionality not migrated	Yes or No	Defined by client
Conorato Carrior	Whether a carrier label is to be produced	Yes or No	Defined by client



Field Name	Description	Options	Generic Value
Stop Short Packing	Whether an order can be short packed	Yes or No	Defined by client
Use Consumable Containers	Does the client require/allow the use of consumable containers?	Yes or No	Defined by client
Pack Before Despatch	Must pack be completed before despatch confirmation is allowed?	Yes or No	Defined by client
Validate Carrier	Must the carrier be validated during packing?	Yes or No	Defined by client
Reference Validation	Does the packing system require validation of SSCC IDs?	SSCC Validation	
Reopen Closed Pack List	Is the user allowed to re-open a closed pack list?	Yes or No	
Volume Capture **	To indicate whether volume is to be automatically calulated 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
Packing List Format **	Format of the Packing List	Formats Include - FWL (default) SIG (client specific) Defined by client if required	
Interface Format	Functionality not migrated	Formats Include - FWL (default)	Defined by client if required
Detail Label Format	Format of the Detailed Label	Formats Include - FWL (default)	Defined by client if required
Package Label Format	Format of the Package Label	Formats Include - FWL (default)	Defined by client if required
Default Qty **	Whether to pack by the pack type or by a case at a time.	Remaining to Pack Single Case	Defined by client
Detail Packing Format	Format of the Detailed Packing List	Formats Include - FWL (default) SIG (client specific) Defined by client if required	
Auto Close	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
Carrier Required **	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)
Default Package Type	A value must be entered if packing with RF	LOV on Pallet Types	Defined by client if required
Use Consumable Temp Monitors			
One Box Order		Yes or No	

3.3 Shipment Pallets

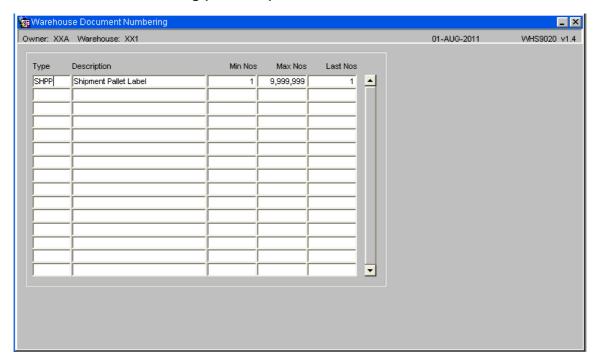
Shipment Pallets are used in combination with or stand-alone from Packing and/or WCS functionality.



3.3.1 Shipment Pallet Label Production

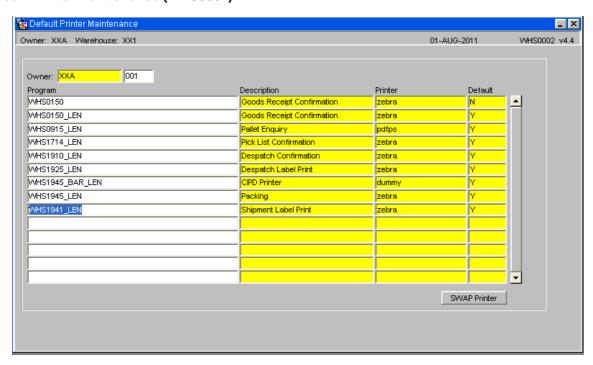
Setup: In order to use the shipment pallet despatch functionality, a shipment label must first be produced. These labels use the last number type ?SHPP? in warehouse document numbering to determine the range to be incremented by 1. These labels are then put onto the despatch pallet and used to scan packs onto in order to despatch packs rather than orders.

3.3.1.1 Warehouse Document Numbering (WHS9020)



Ensure a Type value of SHHP has been entered.

3.3.1.2 Default Printer Maintenance (WHS0002)

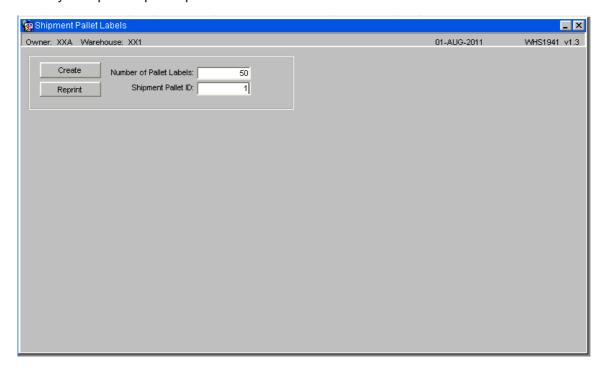


Ensure a Default Printer value has been set up for all relevant users - see Default Printers Maintenance (WHS0002)



3.3.1.3 Shipment Label Print (WHS1941)

This screen allows you to print shipment pallet labels.



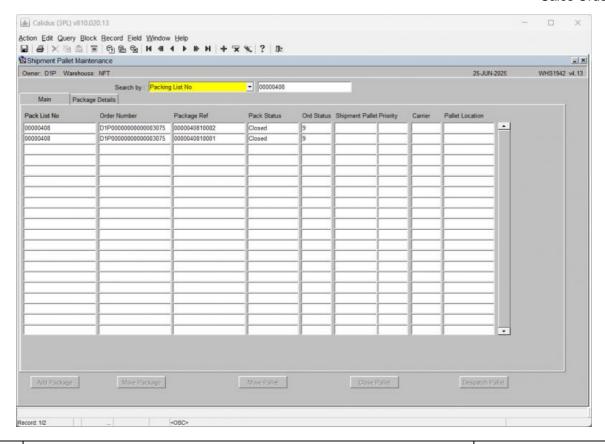
To produce the labels, enter the number of labels required followed by the start number.

Field Name		Description	Options	
Number of Labels	of Pallet	The number of shipment pallet labels to be produced	0 - 999	
Shipment Pallet Id		The specific shipment pallet id a label is to be reproduced for	Must be within the SHPP last number rang had a label produced for it)	ge (i.e. already
Buttons				
Create	Updates the last number in warehouse document numbering and generates the labels			
Reprint	Reprints the selected number of labels or the label of the specific shipment pallet id selected			

3.3.2 Shipment Pallet Maintenance (WHS1942)

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



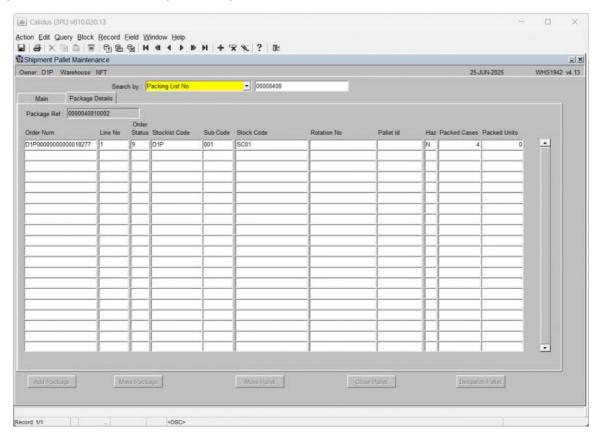


Field Name	Description		Options
	Determines how the selection of packages will be made. The next field will display the shipment pallet number related to the selection criteria		Pack List No Order Number Package Id Shipment Pallet
Pack List No	Displays the pack list no assigned to the ship	oment pallet	Display only
Package Ref	Displays the pack ref of the order assigned to	o the shipment pallet	Display only
Pack Status	Displays the pack status for the pack list		Display only
Shipment Pallet	The shipment pallet number the package is a	assigned to	Display only
Pallet Location	The default shipment pallet location the pack despatch	age has been stored in prior to	Must have been created in location codes maintenance
	Displays the interface status of the package as to whether the carrier		Y or blank
Order Number	The order number relating to the package id		Display only
Order Status	The status of the order		Display only
Invoice	Determines whether a commercial invoice has been received for the order (client specific)		Y or blank
	The order priority of the package - note, dependant on the settings for the		Display only
Carrier	The carrier code of the order associated with the package id		Display only
Buttons	Description	Opt	ions
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	
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	-	



Buttons	Description	Options
Close Pallet		If using commercial invoice, the pallet cannot be closed until all packs for the pallet have received a commercial invoice
•	Despatches the pallet and sets all related orders to status 9	No despatch documentation is produced

3.3.2.1 Shipment Pallet Details Tab (WHS1942)

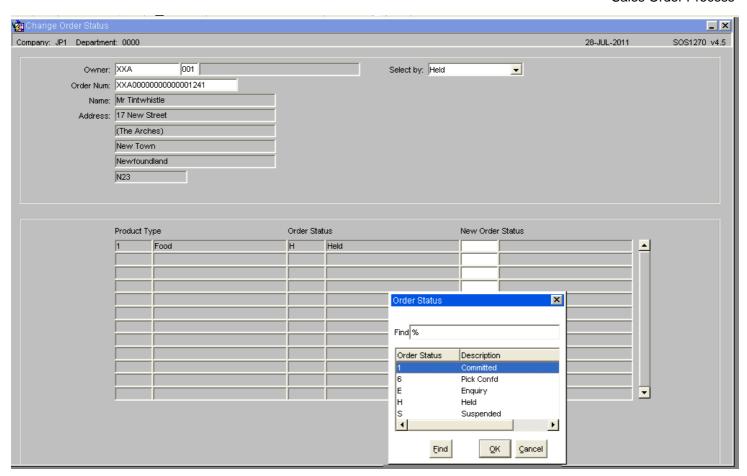


Field Name	Description	Options
Order Num	The order number of the selected pack ref	Display only
Line No	The order detail line no for the package	Display only
Rotation No	The system rotation (batch) for this package	Display only
Pallet Id	The system pallet id for this package	Display only
Haz	Displays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

3.4 Change Order Status (SOS1270)

The Change Order Status screen allows the user to Hold or release an order dependent on its status.





Field Information

- Select by: Drop down list that allows the user to select an Order Status (current values include Held, Committed or Pick Confirmed)
- Order Num: Allows you to enter the number directly or to call a LOV that will display orders at the relevant status dependent on the 'Select by' value

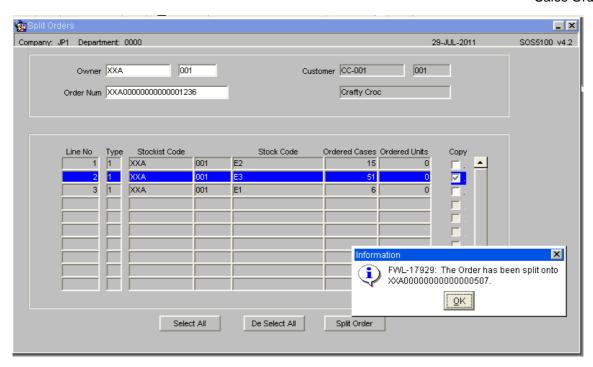
Once the order number has been selected the name and address details will be displayed in the header section, the detail section will display the Product Types for the order and the user can then select a new order status. Upon saving the changes the system will validate the new status and update the record.

NB: The system will validate the Order Status change to ensure that it is a valid change, i.e. it will not be possible to set an order from Committed to Pick Confirmed.

3.5 Split Order (SOS5100)

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.





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.

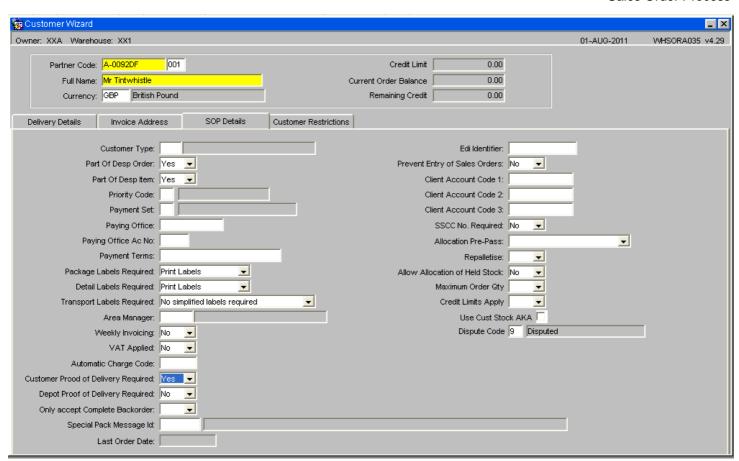
It will not be possible to split an order that has gone beyond status ?1?, i.e. has been allocated. Once the new order has been created, it will not be possible to transfer the order lines back to the original order.

3.6 POD Confirmation (SOS3000)

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.

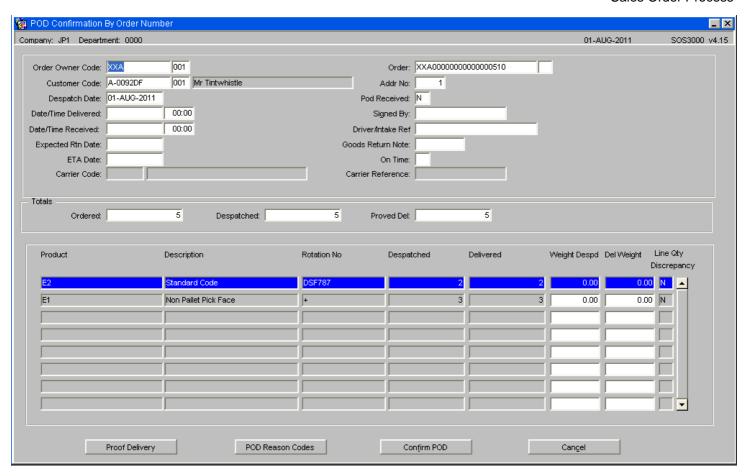
Note: in order to use this functionality, ?POD Required? flag must be set to ?Y? in customer maintenance. (see below)





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



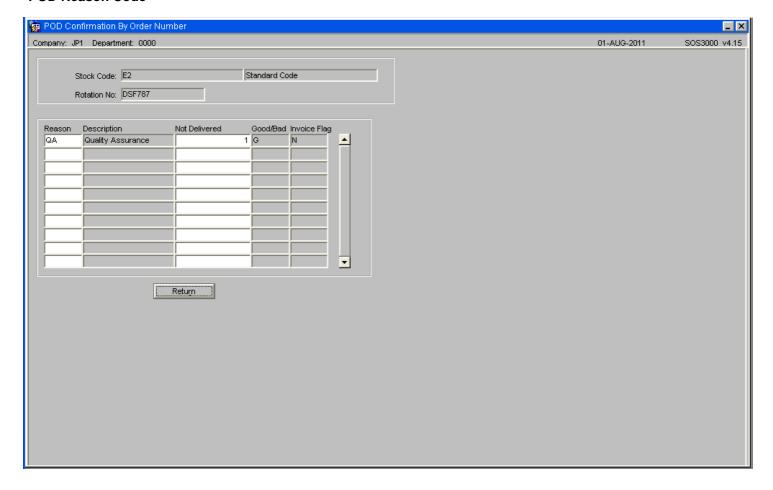


Field Name	Description	Options
Order Owner Code **	The owner of the order to be POD confirmed - will default to current	Must have been created in owner maintenance - LOV available
Order **	The order number to be pod confirmed	Must be at status ?F?
Customer Code	The customer code the order was raised 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
	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	
Delivered	The quantity received on the POD - note this will default to the same as the despatched quantity unless amended	Display only	
Del Weight	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		
	Takes the user to an additional screen to enter reason codes if the quantity to be POD confirmed is		
Confirm POD	Confirms the totals entered as POD confirmed. Once actioned, cannot be reversed		
Cancel Cancels the POD confirmation (not migrated)			

POD Reason Code



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

