efi PrintStream

User Guide

# Warehouse Maintenance - Order Routing Setup and Use
Add-On Module
V21.1.0200

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EFI PrintStream | *V21.1.0200 Warehouse Maintenance - Order Routing User Guide*

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# Introduction

## Overview - Warehouse Maintenance

This document describes the setup/use of the Warehouse Maintenance programming. The basic concept is that a single company/plant user has multiple warehouses in different locations. Each warehouse has its own set of locations (although the Location Builder programs will list them combined as one set) and is intended to ship Fulfillment Sales Orders from specific locations. So, the “Detroit” Warehouse might ship to Canada, Michigan, and other states in the Midwest, while the “Sacramento” Warehouse might ship to states in the West Coast and countries in East Asia.

This new programming allows user to create warehouses and define the countries/states for which it will ship Fulfillment Sales Orders. Locations are then linked to these warehouses. So, an order to Canada for item #1234 would be assigned to the Detroit Warehouse but an order to California for item #1234 would be assigned to the Sacramento warehouse. The Canada order would commit against stock for item #1234 in the Detroit locations, while the California order would commit against stock in the Sacramento locations. Commitments would be made based on the Pick Method settings of the Fulfillment Project, but only for the locations of the associated warehouse. As such, each warehouse also has its own default location defined when it was created.

To summarize, the following setups are required to enable this programming. Details are provided in the documentation below.

1. Create a New Warehouse
2. Link Locations to Warehouses
3. Copy a system Pick Slip to create a new custom format with a Warehouse notation added and link to appropriate Fulfillment Projects (if desired)

Use this area to setup new and manage existing warehouses. This is an Add-on Feature available for purchase.

** This program will need to be enabled by a PrintStream Support Rep in Master Files Reports > Features to Purchase > Generic > Add ability to define Warehouses and Routing.*

## Contact Information

### EFI Support

| | |
|---|---|
| **US Phone:** | 855.334.4457 (first select option 3, then press option 8, then press option 1) |
| **US Fax:** | 415.233.4157 |
| **US E-mail:** | printstream.support@efi.com |

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

**Note** For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

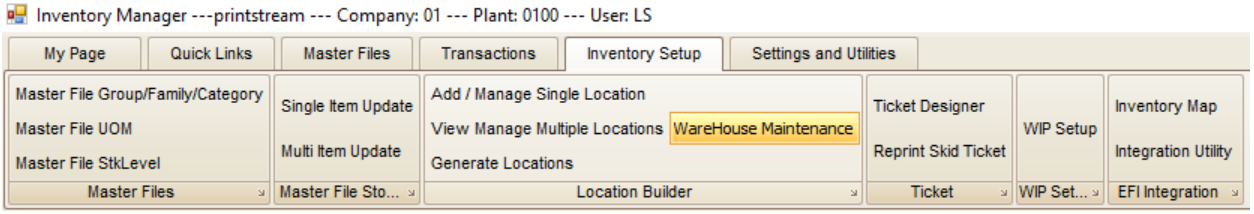
### EFI Professional Services

| | |
|---|---|
| **US Phone:** | 651.365.5321 |
| **US Fax:** | 651.365.5334 |
| **E-Mail:** | ProfessionalServicesOperations@efi.com |

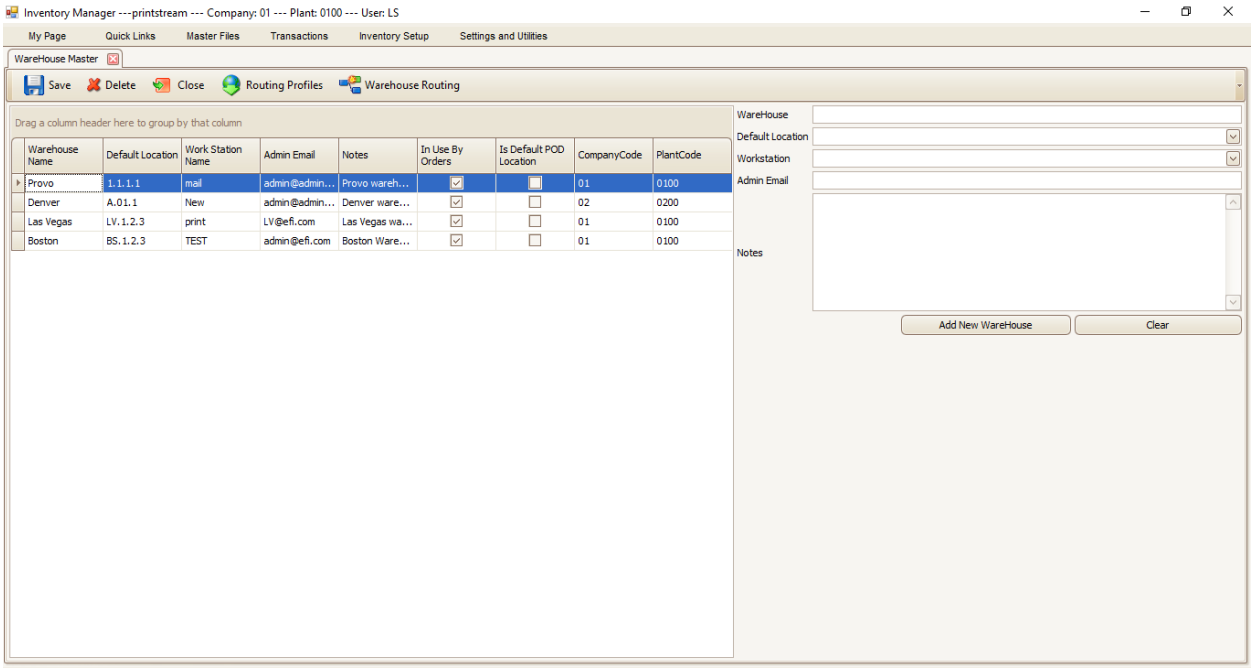
EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

# Warehouse Maintenance

Navigate to “Warehouse Maintenance” program under Inventory Setup tab of Streamline Inventory Manager. This is used to define new warehouse entries.

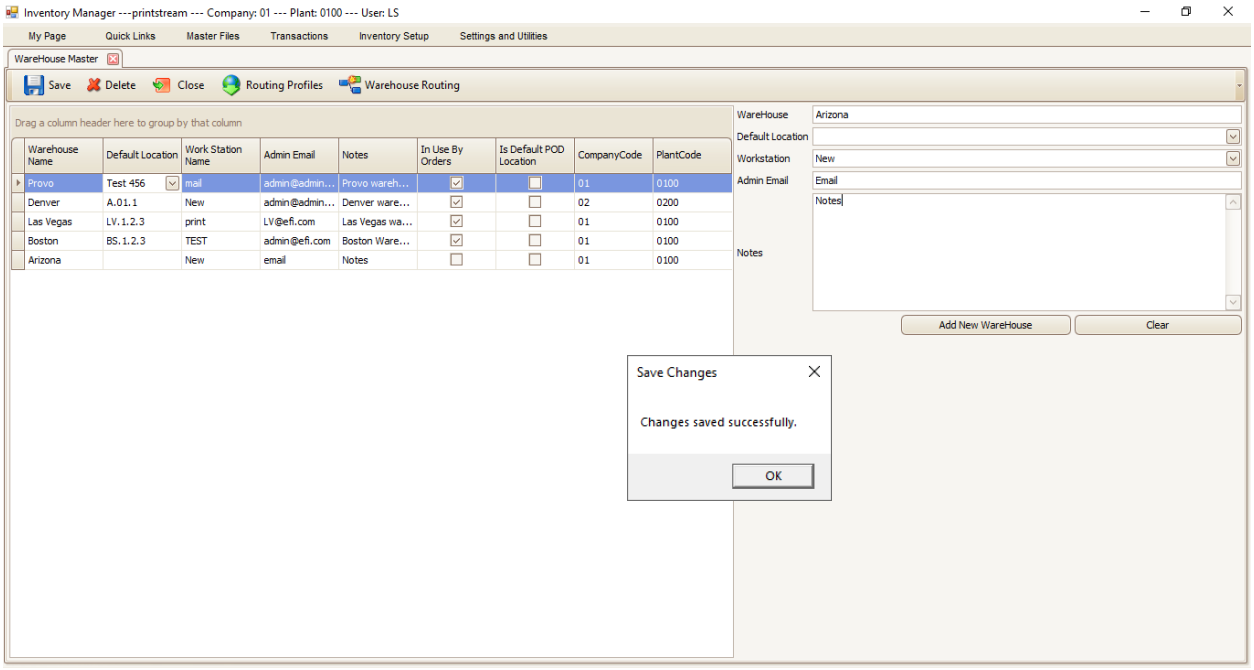



In this example, several warehouses have already been defined. In a new database the grid on the left would be blank.



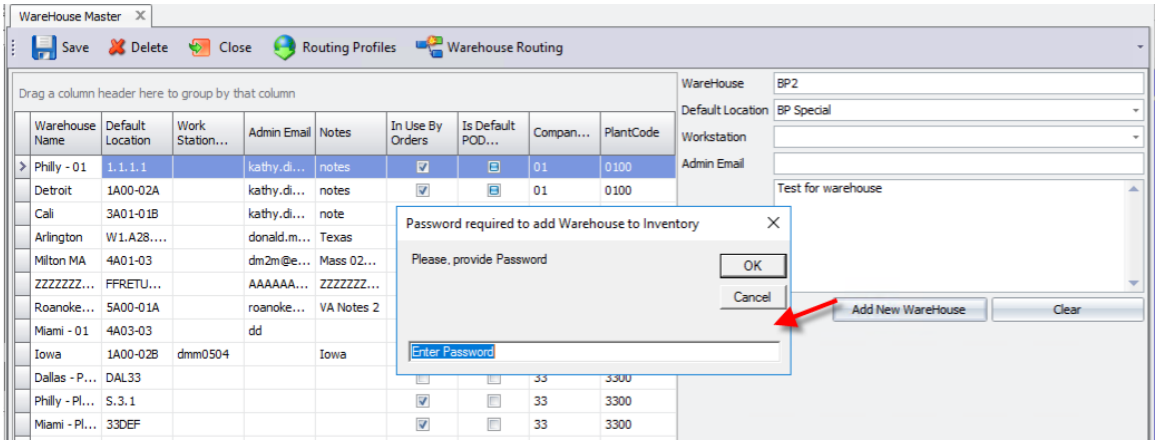
# Creating a New Warehouse

To create a new warehouse, enter data information in the right part of the screen and click 'Add New Warehouse'. Click Save to save your new warehouse entry.




- Warehouse – the name of the warehouse. This entry will appear in other Inventory and Fulfillment screens
- Default Location – return to complete this once the default pick location for the warehouse is set up in the next steps.
- Workstation – assign a shopfloor workstation as defined in the system. This entry is optional.
- Admin Email – Optional entry
- Notes – Optional entry

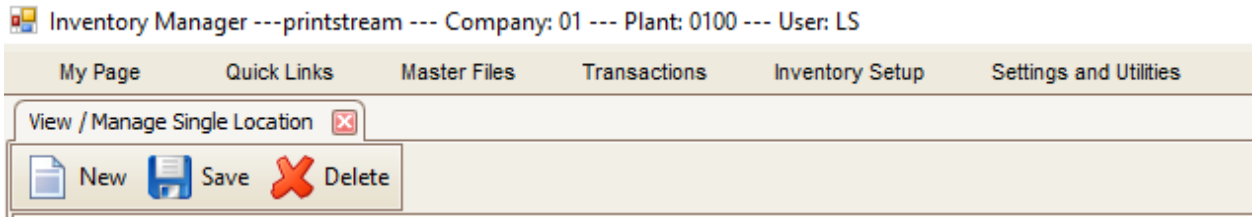
Password protection to "**Warehouse Master**" to avoid the unlimited creation of warehouses.



# Creating a New Default Pick Location

The new warehouse now needs a default pick location created and assigned.

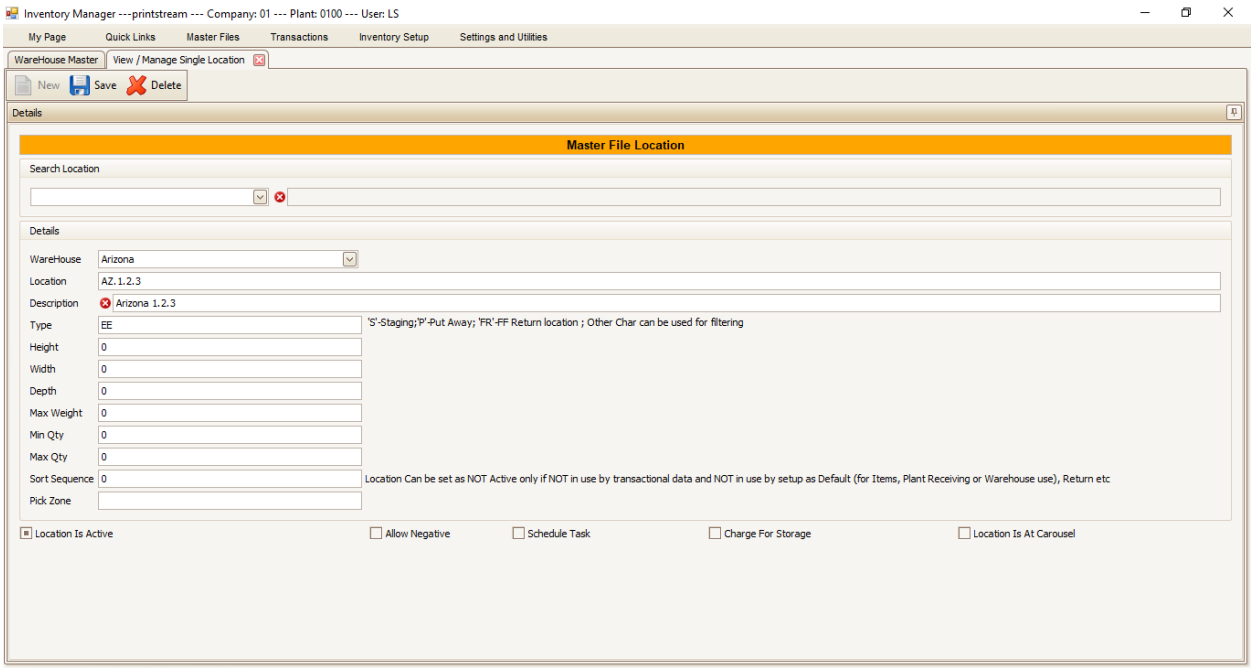
In Inventory Setup > Add / Manage Single Location, click the New icon top left to get started.




Complete the following fields:

Location – this is a 15-character code which defines the warehouse space
Description – this is a 40-character description which defines the warehouse space
Type – this is a two-character field used for filtering
Height, Width, Depth, Max Weight, Min Qty and Max Qty are all optional fields that further define the space

Select the new warehouse in the Warehouse column. Tab out of the field.

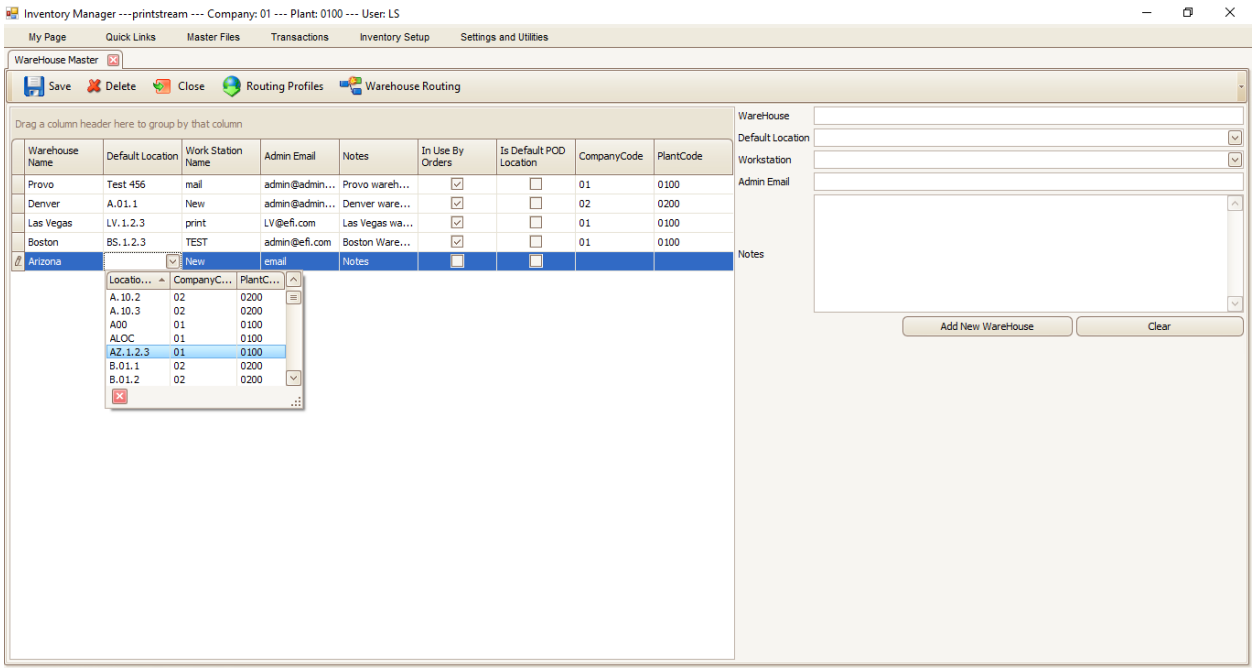



Save the new default pick location for the new warehouse.

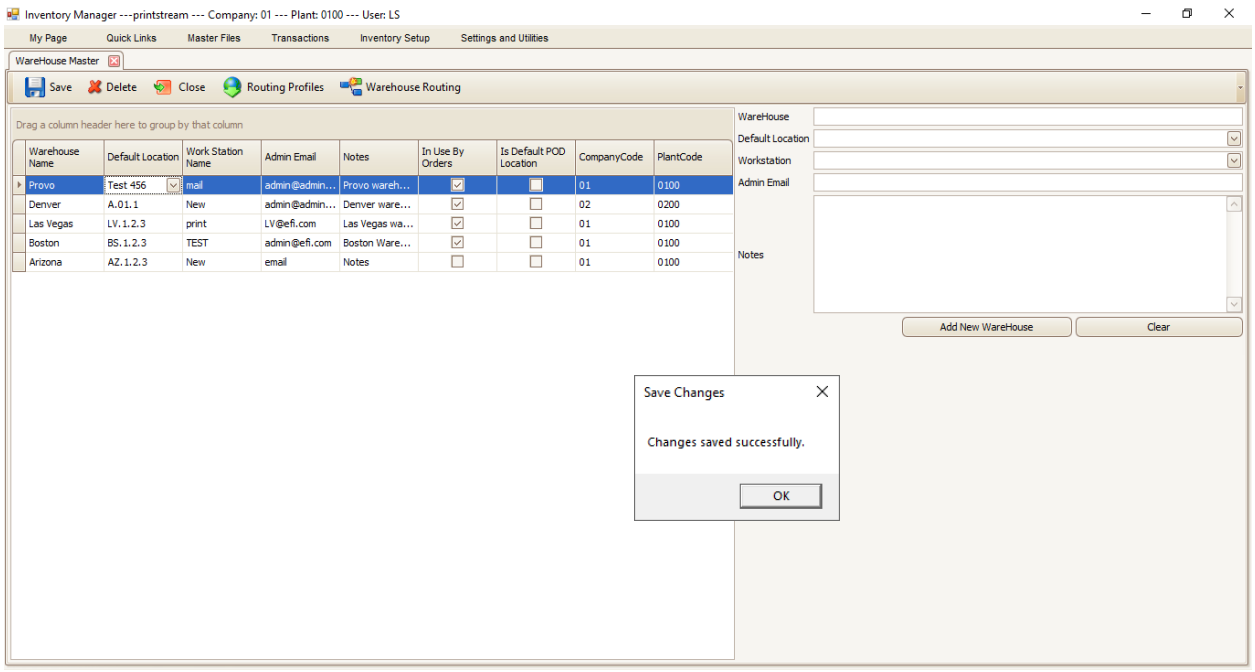
# Linking a New Default Pick Location to the New Warehouse

Now that the default pick location has been set up for the new warehouse, link the default location to the new warehouse. Return to the Warehouse Maintenance program.

Click in the field for the Default Location for the Warehouse Name and select the location just created.




Save changes.



# Routing of Inventory Picking to Correct Warehouse

PrintStream provides the ability to configure a lookup table of Warehouse Locations to Sales Order Ship-To Country and State - this is a one to one relationship. E.g. if an order is to be shipped to Arizona, the system may choose to fulfill the pick and pack items from the California Warehouse. New programming now allows the system to check inventory balances at the preferred warehouse and if the item is not available at that location then look for the next best location.

This ability to auto route to different locations is a system level flag. Some orders should NOT follow these routing rules e.g. POD items or items that MUST be shipped together. User links a "default profile" to the customer project to determine which routing profile should be used for orders for this project.

Warehouse Routing allows routing profiles to be created instead of using the hard coding programming that worked off of the ship to recipient's address. Within the Warehouse Mapping, we have added additional options so the system can auto route depending on the additional choices attached to the state.

## Order Routing Functionality

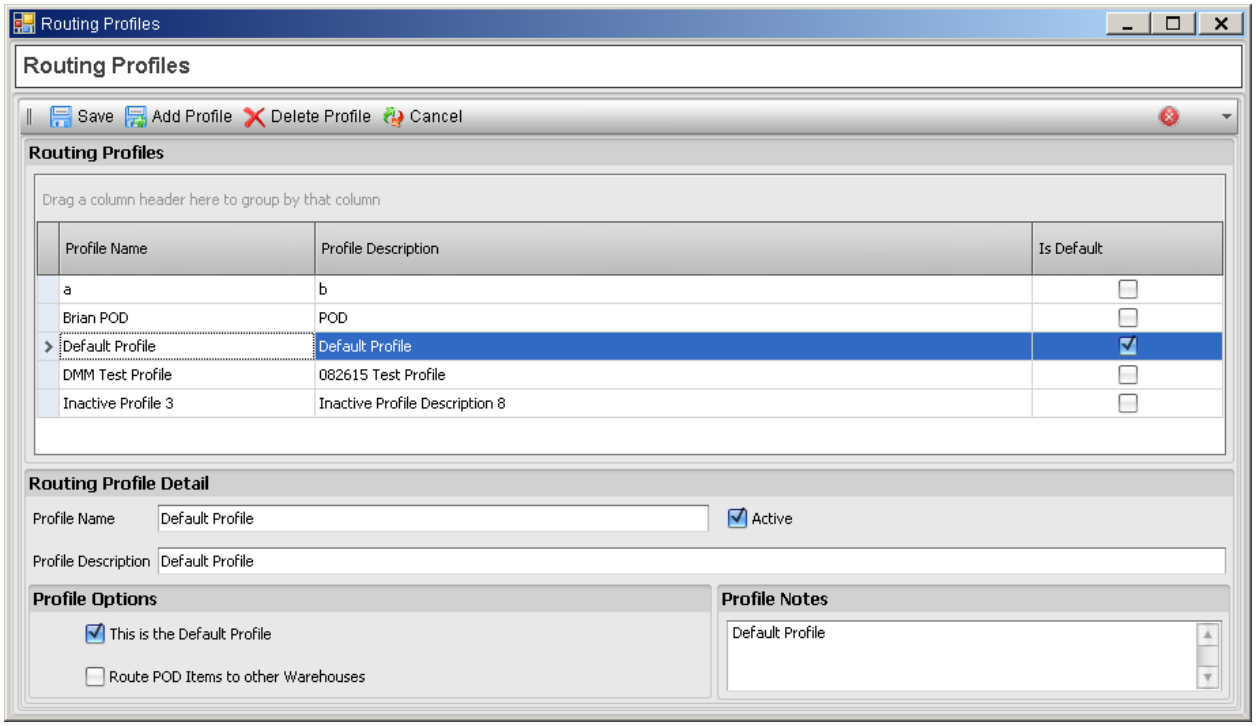
**This is the sequence that an order is processed**

Routing Profiles are setup at the project – essentially processes orders in these warehouses in this order;

- **Sales Order Save** - Order is placed and saved.
- **Backorder** - rules kick in based on balances in all warehouses. If backorder ship partial, we split the line ONLY if not enough available in **ALL** warehouses.
- **Default Warehouse** - assigned based on ship to state and routing profile in the project.
- **Revision Replacement** - kicks in for any backorders and replaces the line with a new revision that has enough stock on hand to fulfill this line. There is no partial replacement. The replacement will not replace if there is enough quantity available in the **SPECIFIC** warehouse that the line has been assigned to. (Not available for use with Mid-Market Suite)
- **Order Release** – Orders are released. If the partial release flag is on, it will release the order into the Warehouse which has quantity to fill the entire order line. It will split the remaining lines that could not be fulfilled in that warehouse and place those lines on backorder.
- **Order Routing** - kicks in when the following conditions occur as shown in the example below;
    - Example: Sales Order with Order Qty = 50 saved for Warehouse1
        - The routing profile has 1st choice Warehouse2 and 2nd choice Warehouse3
        - At Release:
            - - it will check available qty at Warehouse1 (Avail. qty = 15)
            - - if not, we check on 1st option -> Warehouse2 (Avail. qty = 35)
            - - if not, we check on 2nd option -> Warehouse3 (Avail. qty = 25)
        - If items not fully available at any warehouse, then;
            - - If Partial Release is ON then it will choose the warehouse where we have the most items (Warehouse2)
            - - If Partial Release is OFF then nothing gets released
- **Revision Replacement** - kicks in for any backorders and replaces the line with a new revision that has enough stock on hand to fulfill this line in all warehouses. There is no partial replacement. (Not available for use with Mid-Market Suite)

## Routing Profiles

The Routing Profiles screen allows the user to define an unlimited number of profiles that drive the routing of picks to different warehouses.

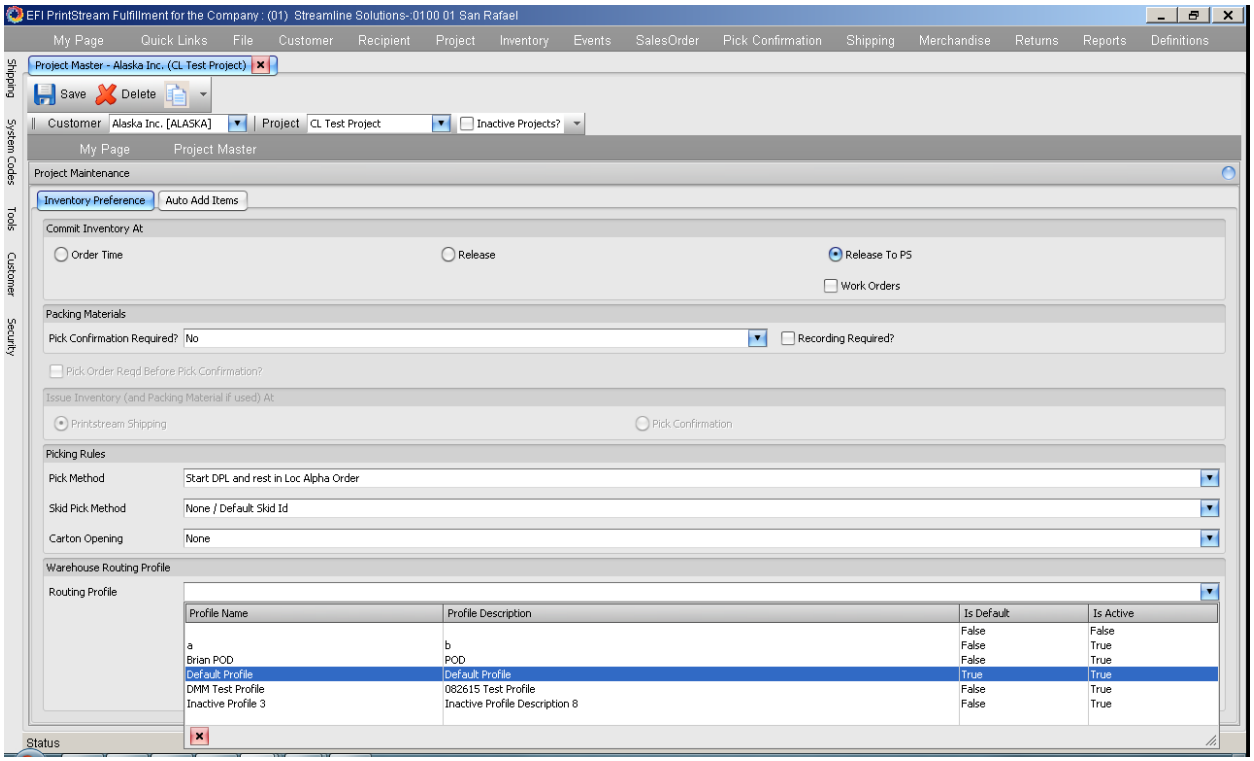



To create a new Routing Profile, select ‘Add Profile’ and enter the following fields;

- **Profile Name** – Name of profile.
- **Active Checkbox** – Check to activate profile to be used by the order release program. If a profile is deleted that has already been associated with a customer, then a warning shows which customers it is linked to. Allow deletion after warning – and all ongoing orders that originally liked to the now inactive profile would then use the default profile. (You cannot delete a profile if it is the default profile.)
- **Profile Notes Button** – Click to enter notes about the profile.
- **Profile Description** – Description for the profile
- **Default Profile Checkbox** – If this is the default profile to be used. There must always have a default profile checked and only one default profile and the default profile must be active.
- **Route POD Items Checkbox** – Indicates if POD items should be routed to other warehouses.

### Fulfillment Project Routing Profile Preference

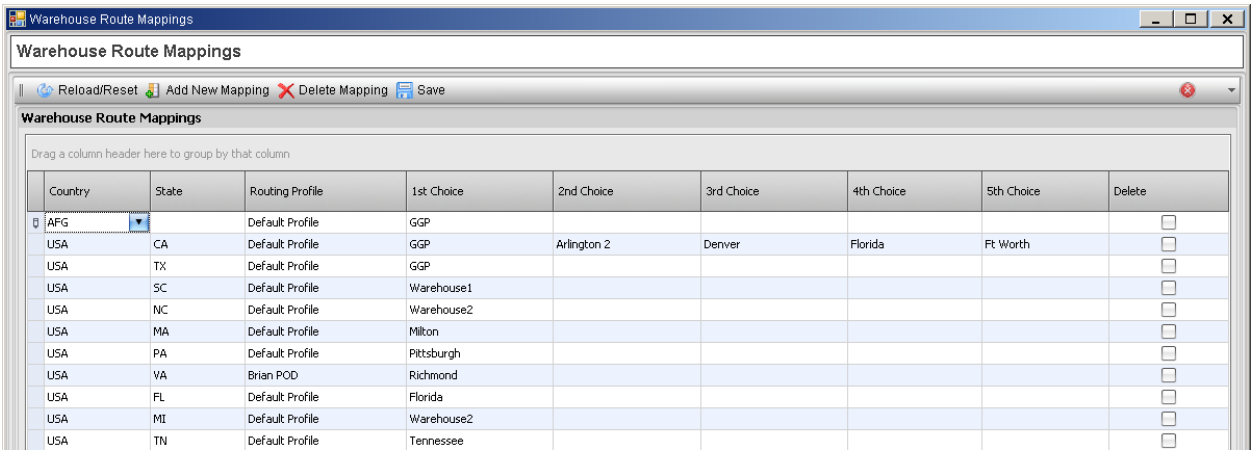
A new field has been added to the Fulfillment Project – Inventory Preferences screen to allow the user to select which routing profile should be used for orders for each customer's project(s).




If a specific routing profile is not nominated on a project, then use the default routing profile when releasing orders. If no routing profiles have been setup then system just picks from default locations and no alternate routing is done when releasing orders.

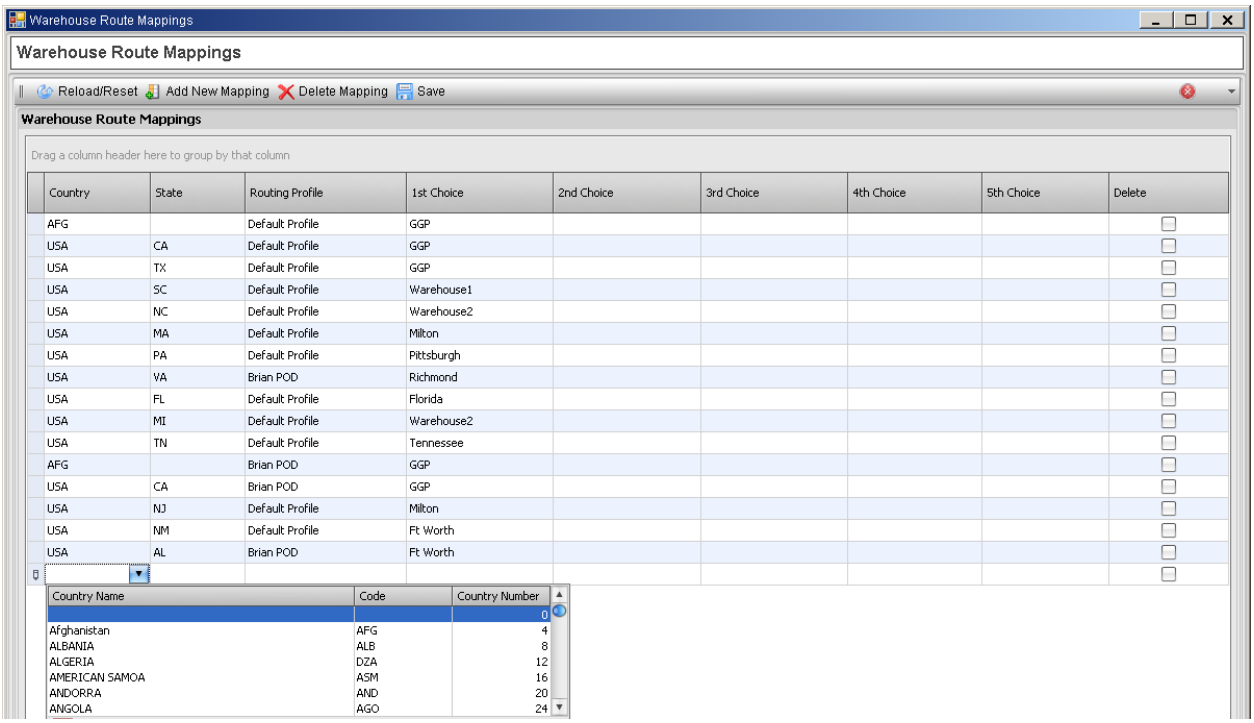
## Warehouse Routing

This screen allows a user to map countries and states to different warehouses for each routing profile and to also provide the ability to nominate the first choice for routing and then additional choices if inventory is not available at the first-choice warehouse.




| Country | State | Routing Profile | 1st Choice | 2nd Choice | 3rd Choice | 4th Choice | 5th Choice | Delete |
|---|---|---|---|---|---|---|---|---|
| AFG | | Default Profile | GGP | | | | | ☐ |
| USA | CA | Default Profile | GGP | Arlington 2 | Denver | Florida | Ft Worth | ☐ |
| USA | TX | Default Profile | GGP | | | | | ☐ |
| USA | SC | Default Profile | Warehouse1 | | | | | ☐ |
| USA | NC | Default Profile | Warehouse2 | | | | | ☐ |
| USA | MA | Default Profile | Milton | | | | | ☐ |
| USA | PA | Default Profile | Pittsburgh | | | | | ☐ |
| USA | VA | Brian POD | Richmond | | | | | ☐ |
| USA | FL | Default Profile | Florida | | | | | ☐ |
| USA | MI | Default Profile | Warehouse2 | | | | | ☐ |
| USA | TN | Default Profile | Tennessee | | | | | ☐ |

To add new Warehouse Route Mappings, select ‘Add New Mapping’. A new row will be created. Select the Country/State, Routing Profile, and the 1st Choice. Select additional choices as needed and Save.



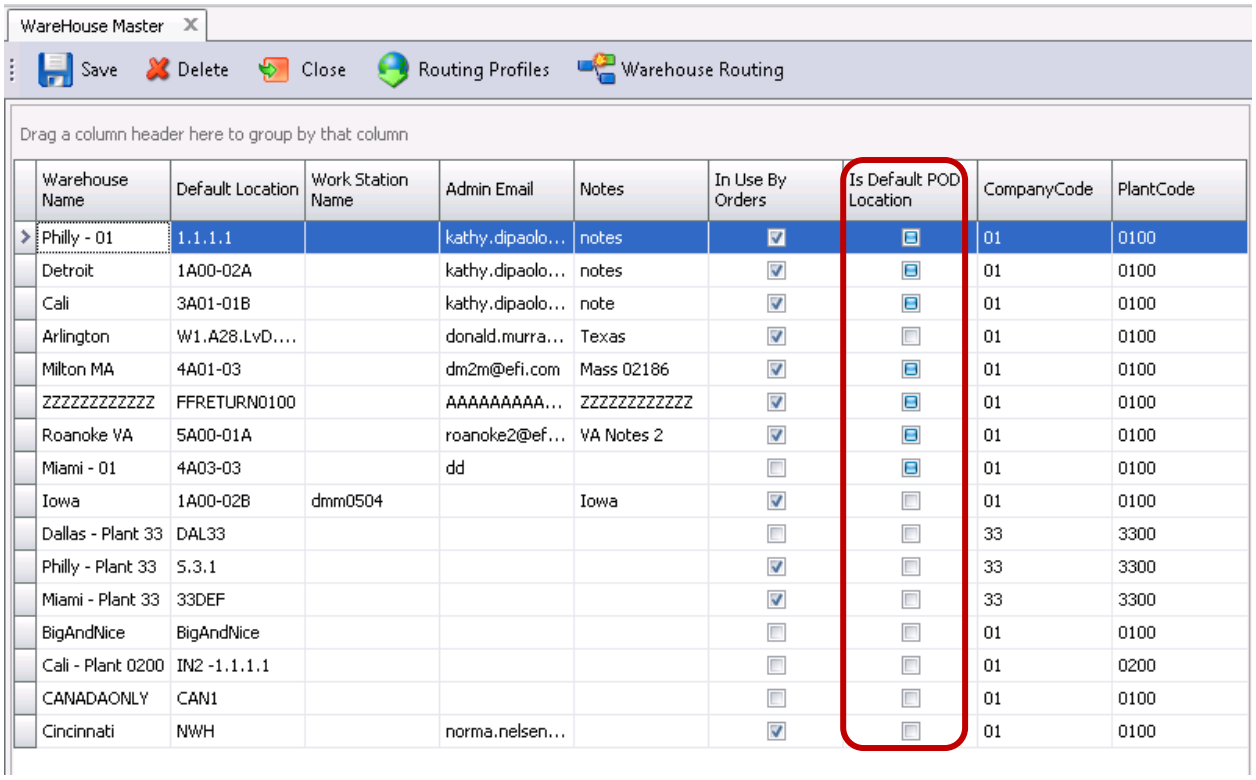

| Country | State | Routing Profile | 1st Choice | 2nd Choice | 3rd Choice | 4th Choice | 5th Choice | Delete |
|---|---|---|---|---|---|---|---|---|
| AFG | | Default Profile | GGP | | | | | ☐ |
| USA | CA | Default Profile | GGP | | | | | ☐ |
| USA | TX | Default Profile | GGP | | | | | ☐ |
| USA | SC | Default Profile | Warehouse1 | | | | | ☐ |
| USA | NC | Default Profile | Warehouse2 | | | | | ☐ |
| USA | MA | Default Profile | Milton | | | | | ☐ |
| USA | PA | Default Profile | Pittsburgh | | | | | ☐ |
| USA | VA | Brian POD | Richmond | | | | | ☐ |
| USA | FL | Default Profile | Florida | | | | | ☐ |
| USA | MI | Default Profile | Warehouse2 | | | | | ☐ |
| USA | TN | Default Profile | Tennessee | | | | | ☐ |
| AFG | | Brian POD | GGP | | | | | ☐ |
| USA | CA | Brian POD | GGP | | | | | ☐ |
| USA | NJ | Default Profile | Milton | | | | | ☐ |
| USA | NM | Default Profile | Ft Worth | | | | | ☐ |
| USA | AL | Brian POD | Ft Worth | | | | | ☐ |

| Country Name | Code | Country Number |
|---|---|---|
| | | 0 |
| Afghanistan | AFG | 4 |
| ALBANIA | ALB | 8 |
| ALGERIA | DZA | 12 |
| AMERICAN SAMOA | ASM | 16 |
| ANDORRA | AND | 20 |
| ANGOLA | AGO | 24 |

Check the Delete flag and select ‘Delete Mapping’ from the menu bar to delete a Warehouse Route Mapping.

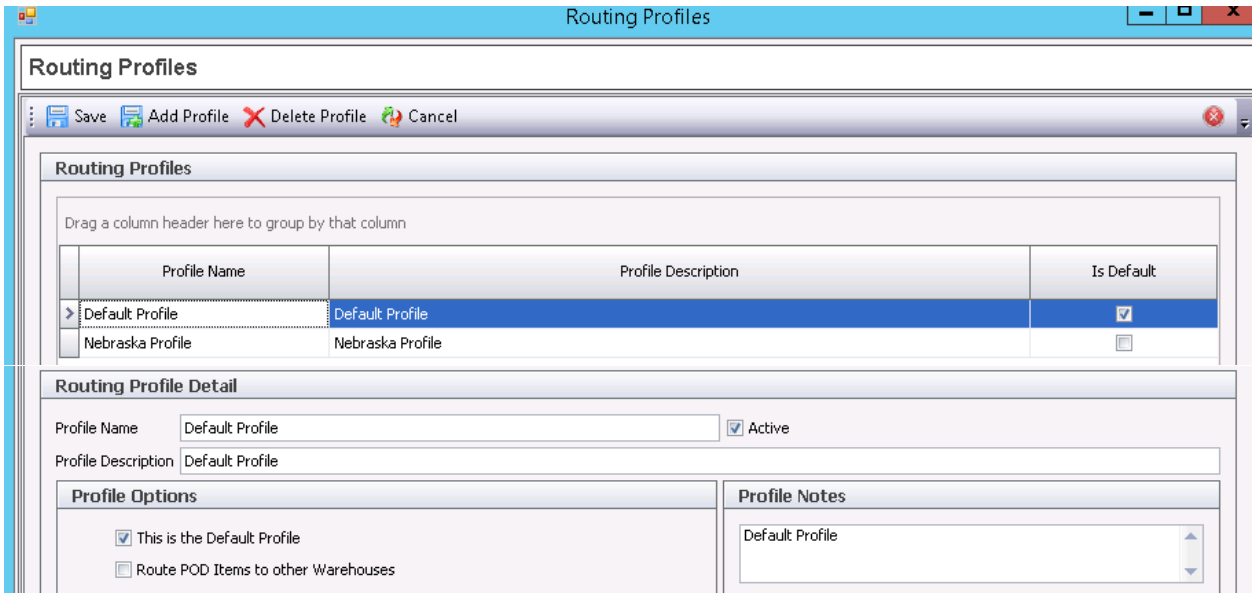
# Warehouse Distribution of POD Items to Multiple Warehouses

To send POD items to multiple warehouses (one warehouse for each item), set up the Warehouse Master as follows with **no** warehouse set as the "Is Default POD Location". When



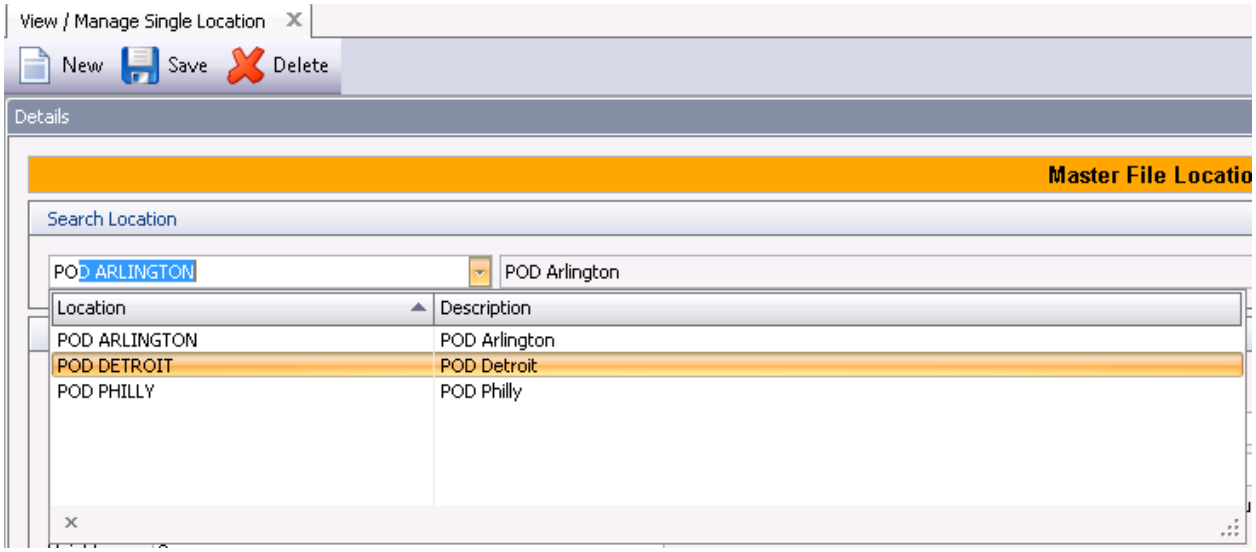

| Warehouse Name | Default Location | Work Station Name | Admin Email | Notes | In Use By Orders | Is Default POD Location | CompanyCode | PlantCode |
|---|---|---|---|---|---|---|---|---|
| Philly - 01 | 1.1.1.1 | | kathy.dipaolo... | notes | ☑ | ⊟ | 01 | 0100 |
| Detroit | 1A00-02A | | kathy.dipaolo... | notes | ☑ | ⊟ | 01 | 0100 |
| Cali | 3A01-01B | | kathy.dipaolo... | note | ☑ | ⊟ | 01 | 0100 |
| Arlington | W1.A28.LvD.... | | donald.murra... | Texas | ☑ | ☐ | 01 | 0100 |
| Milton MA | 4A01-03 | | dm2m@efi.com | Mass 02186 | ☑ | ⊟ | 01 | 0100 |
| ZZZZZZZZZZZZ | FFRETURN0100 | | AAAAAAAAA... | ZZZZZZZZZZZZ | ☑ | ⊟ | 01 | 0100 |
| Roanoke VA | 5A00-01A | | roanoke2@ef... | VA Notes 2 | ☑ | ⊟ | 01 | 0100 |
| Miami - 01 | 4A03-03 | | dd | | ☐ | ⊟ | 01 | 0100 |
| Iowa | 1A00-02B | dmm0504 | | Iowa | ☑ | ☐ | 01 | 0100 |
| Dallas - Plant 33 | DAL33 | | | | ☐ | ☐ | 33 | 3300 |
| Philly - Plant 33 | S.3.1 | | | | ☑ | ☐ | 33 | 3300 |
| Miami - Plant 33 | 33DEF | | | | ☑ | ☐ | 33 | 3300 |
| BigAndNice | BigAndNice | | | | ☐ | ☐ | 01 | 0100 |
| Cali - Plant 0200 | IN2 -1.1.1.1 | | | | ☐ | ☐ | 01 | 0200 |
| CANADAONLY | CAN1 | | | | ☐ | ☐ | 01 | 0100 |
| Cincinnati | NWH | | norma.nelsen... | | ☑ | ☐ | 01 | 0100 |

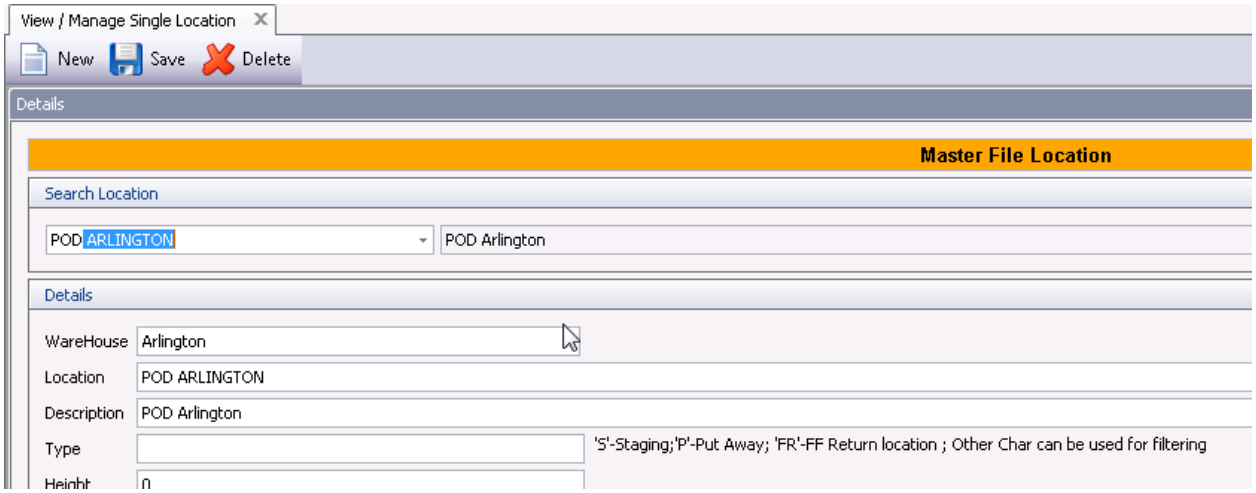
Routing Profiles should not have any profile set to "Route POD Items to other Warehouses" when multiple warehouse distribution for PODs is required.



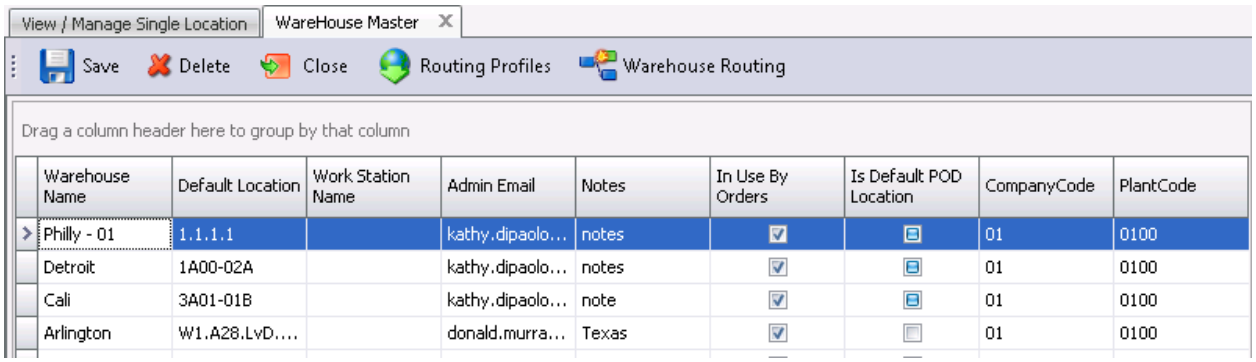

Profile Options > **Route POD Items to other Warehouses** - if unchecked will use the default system POD (system wide) POD warehouse.

Create a Default Warehouse for each POD location. In this example, there is a POD warehouse created for Arlington, Philly and Detroit.

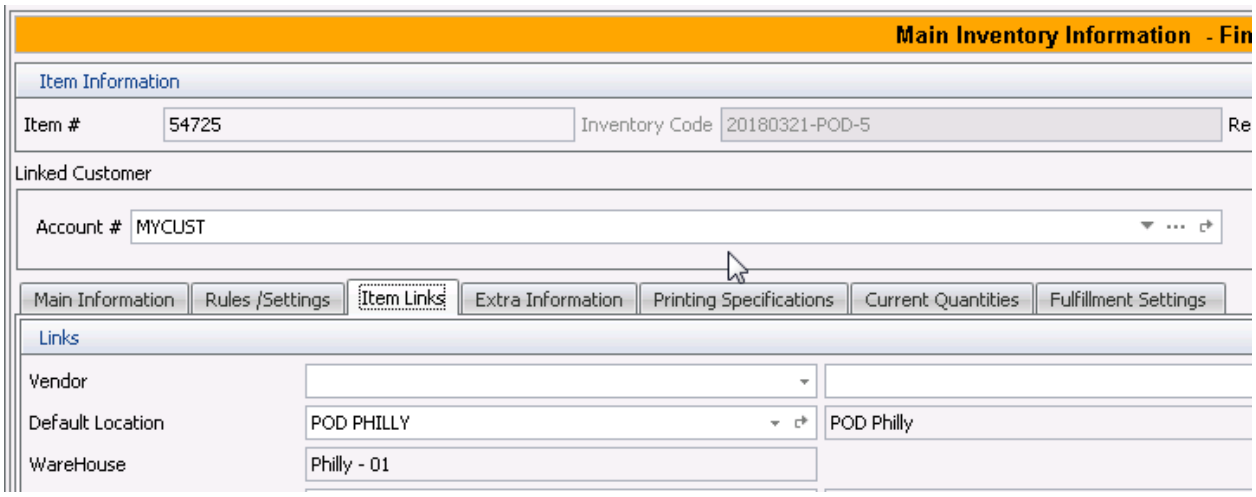


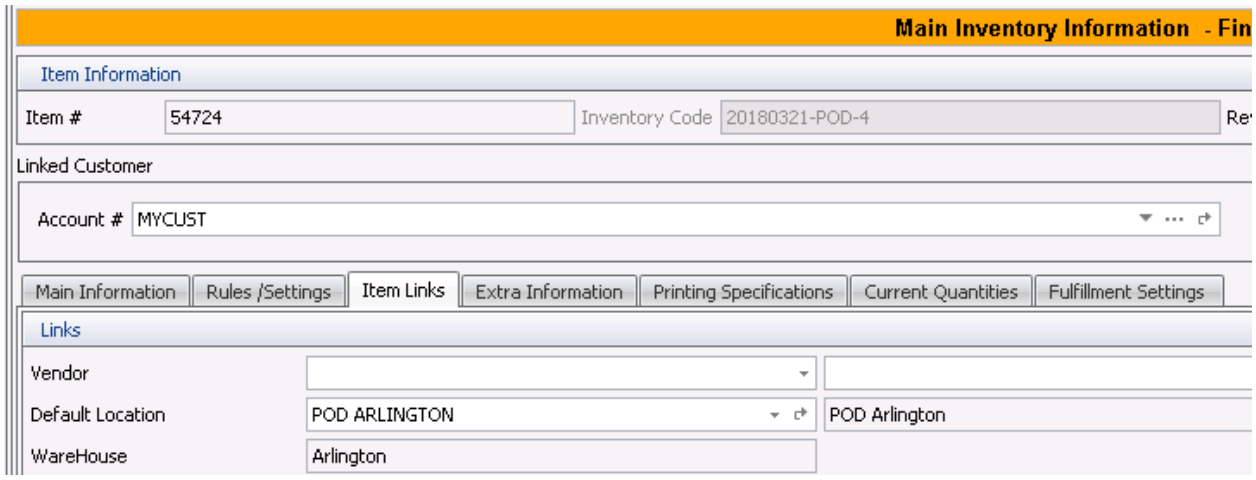



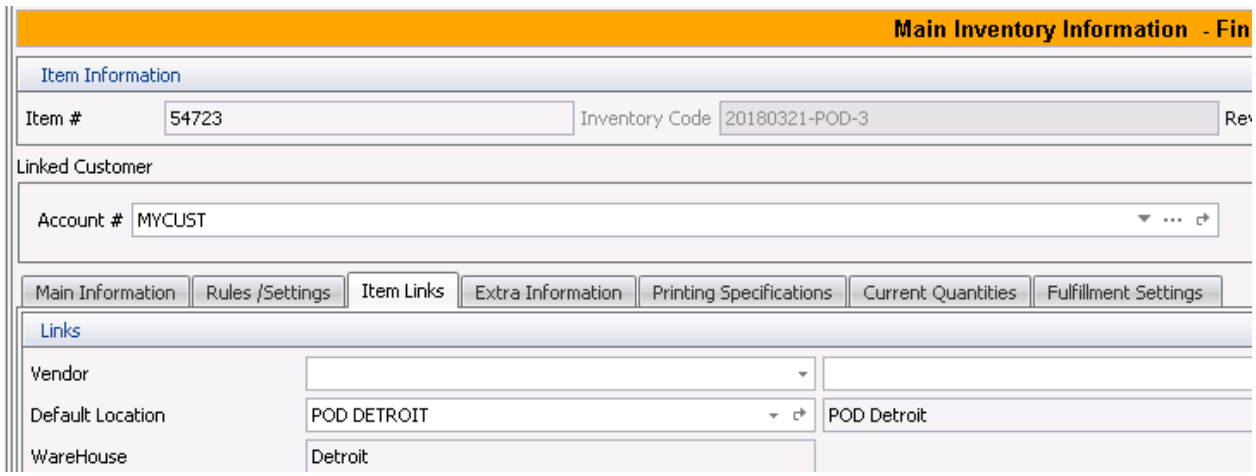

Each location is mapped to the Warehouse that has been set up in Warehouse Maintenance.



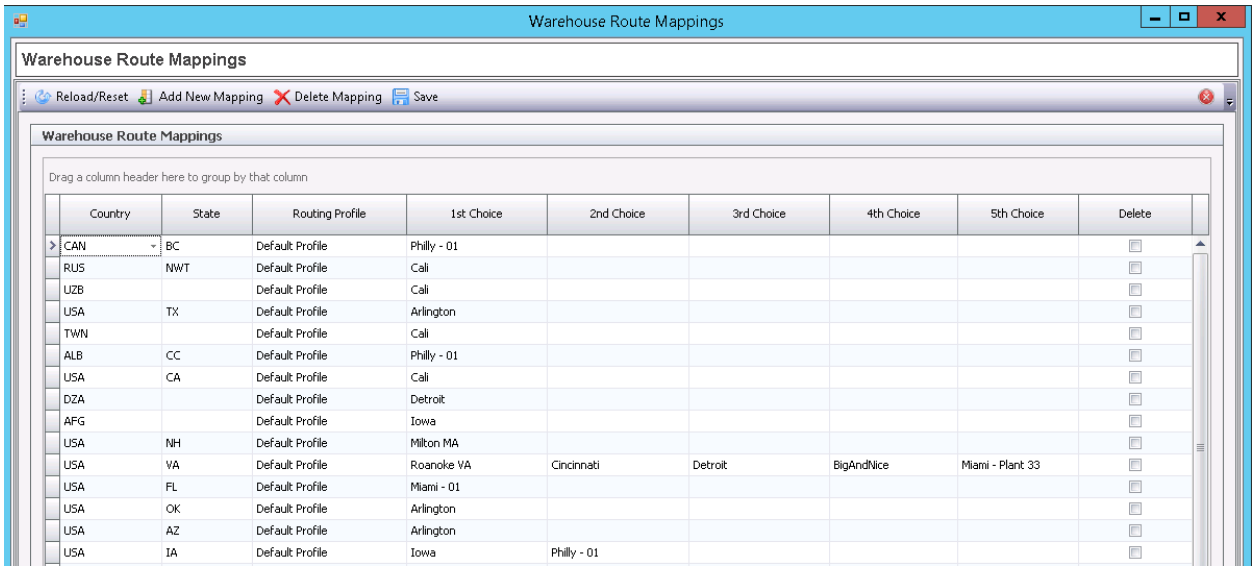
POD Inventory is then linked to the POD Warehouse Location which is mapped to the Warehouse.



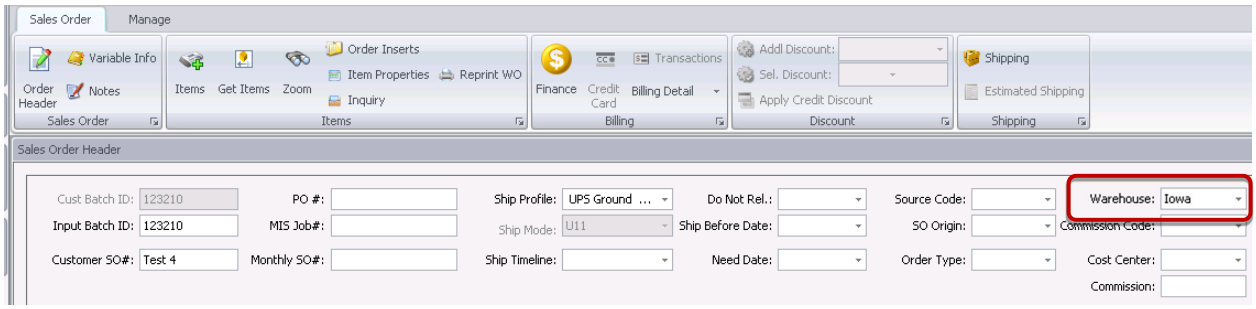
Based on Ship To addresses, the pick and pack items will still come from the warehouse that is mapped to the country and state. To map all states in one country to process pick and pack items from the same warehouse, set up the country without the state. Remember, the system will handle up to five choices for warehouse distribution of mapped country/state.




| Country | State | Routing Profile | 1st Choice | 2nd Choice | 3rd Choice | 4th Choice | 5th Choice | Delete |
|---|---|---|---|---|---|---|---|---|
| CAN | BC | Default Profile | Philly - 01 | | | | | |
| RUS | NWT | Default Profile | Cali | | | | | |
| UZB | | Default Profile | Cali | | | | | |
| USA | TX | Default Profile | Arlington | | | | | |
| TWN | | Default Profile | Cali | | | | | |
| ALB | CC | Default Profile | Philly - 01 | | | | | |
| USA | CA | Default Profile | Cali | | | | | |
| DZA | | Default Profile | Detroit | | | | | |
| AFG | | Default Profile | Iowa | | | | | |
| USA | NH | Default Profile | Milton MA | | | | | |
| USA | VA | Default Profile | Roanoke VA | Cincinnati | Detroit | BigAndNice | Miami - Plant 33 | |
| USA | FL | Default Profile | Miami - 01 | | | | | |
| USA | OK | Default Profile | Arlington | | | | | |
| USA | AZ | Default Profile | Arlington | | | | | |
| USA | IA | Default Profile | Iowa | Philly - 01 | | | | |

## Placing the Sales Order

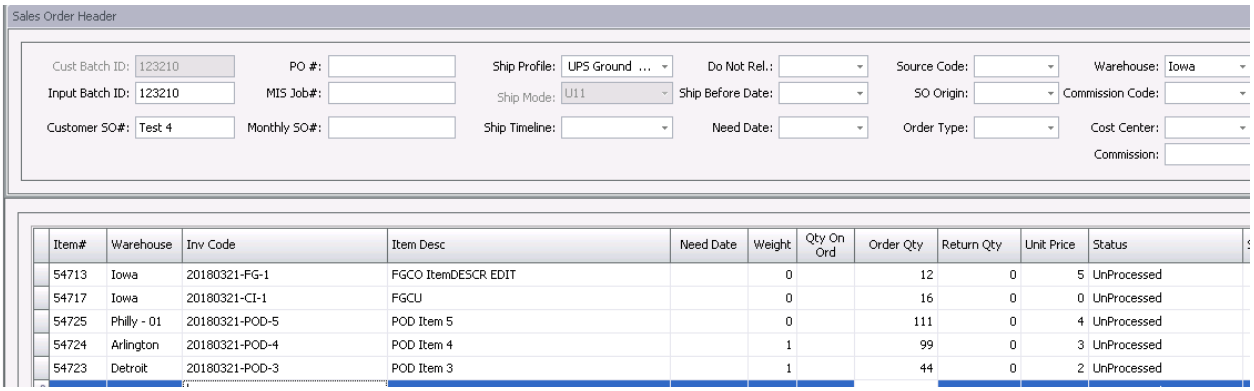
When the sales order is created, the header Warehouse will be the warehouse that matches the Ship To address. The ship to address is Ames, Iowa, which is mapped to Warehouse Iowa, so the header record shows the warehouse as Iowa.




Each line item's warehouse is based on the type of item it is and any warehouse routings the system is managing. In this order there are two pick and pack items and based on rules and setup, those items are expecting to go to Iowa.

Also included in this order are three POD items, each of which is produced in a different warehouse. An example of when this would be optimal is when one plant (warehouse) has a wide format printer, while another has an offset printer. Either item cannot be produced in a plant (warehouse) other than the one with the specific printer needs.

The system looks at the setup and concludes that each of the three warehouses where the product will be produced are linked through the POD item which addresses each inventory code individually based on the warehouse distribution and master file setup.



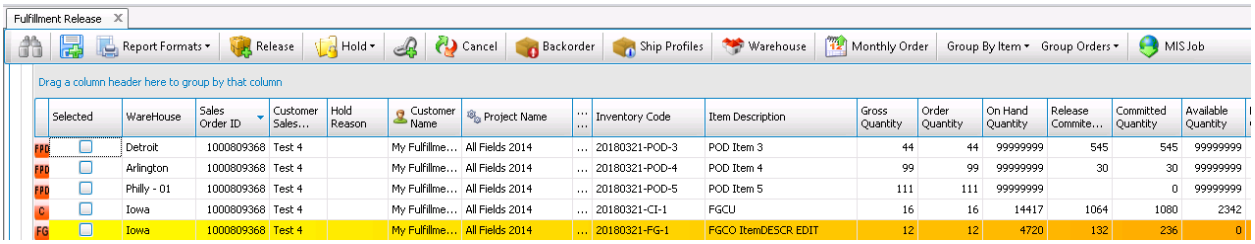

| Item# | Warehouse | Inv Code | Item Desc | Need Date | Weight | Qty On Ord | Order Qty | Return Qty | Unit Price | Status |
|---|---|---|---|---|---|---|---|---|---|---|
| 54713 | Iowa | 20180321-FG-1 | FGCO ItemDESCR EDIT | | 0 | | 12 | 0 | 5 | UnProcessed |
| 54717 | Iowa | 20180321-CI-1 | FGCU | | 0 | | 16 | 0 | 0 | UnProcessed |
| 54725 | Philly - 01 | 20180321-POD-5 | POD Item 5 | | 0 | | 111 | 0 | 4 | UnProcessed |
| 54724 | Arlington | 20180321-POD-4 | POD Item 4 | | 1 | | 99 | 0 | 3 | UnProcessed |
| 54723 | Detroit | 20180321-POD-3 | POD Item 3 | | 1 | | 44 | 0 | 2 | UnProcessed |

Line 1 is expecting to be shipped out of Iowa
Line 2 is expecting to be shipped out of Iowa
Line 3 will be produced in the Philly – 01 plant/warehouse
Line 4 will be produced in the Arlington plant/warehouse
Line 5 will be produced in the Detroit plant/warehouse

## Releasing the Sales Order with Multiple Warehouse POD Functionality

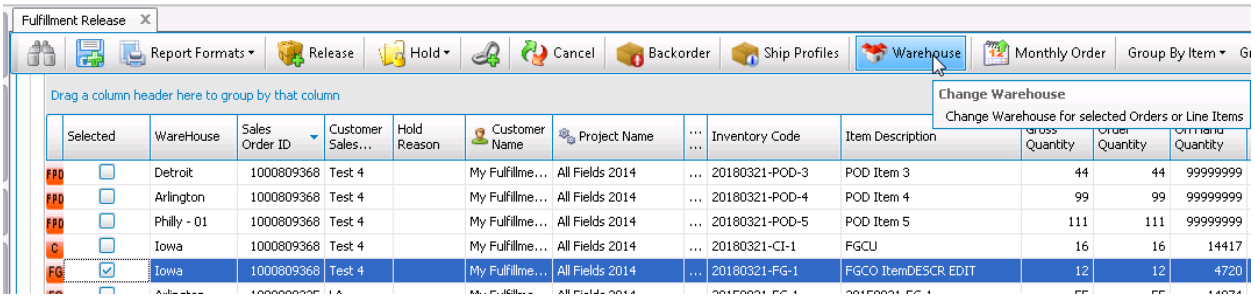
Releasing the sales order has yet one more option for warehouse distribution. In the case of pick and pack items that are mapped to ship from specific warehouses based on the ship to address, if the item(s) are not available in the warehouse expected, the release grid will show the user that the expected warehouse does not have sufficient stock to ship product and offers the option to select an alternate warehouse for distribution as opposed to placing the item in a backorder status at release.

Before the order is released, on the Order Lines Found tab of the release grid, users see a yellow-to-orange variegated line to indicate that the warehouse from which the item is expected to ship does not have sufficient quantity to do so.

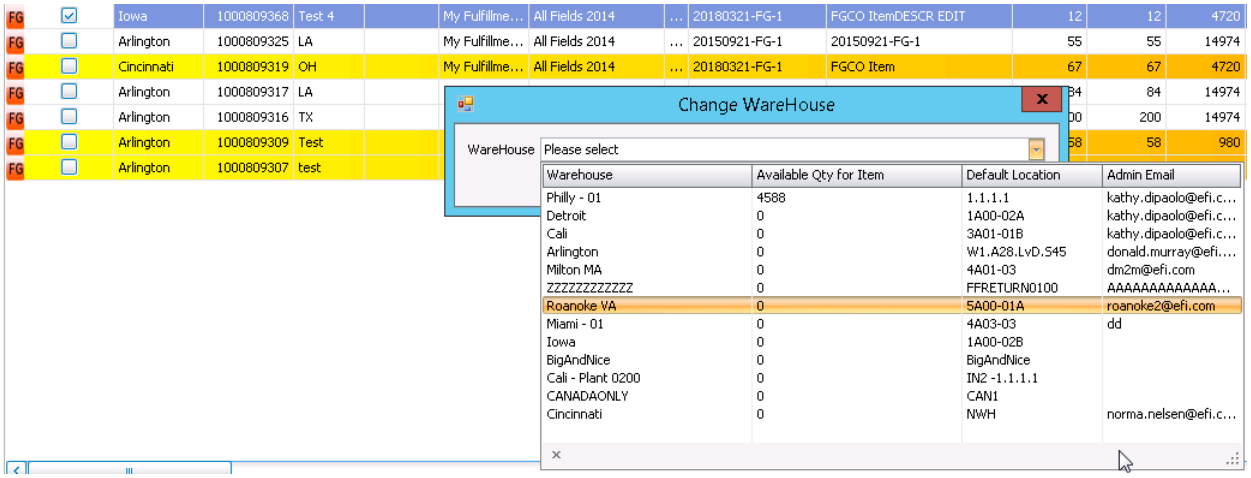



This shows users immediately that there is stock in another warehouse, but not the expected warehouse.

Users can select the order line, click on the Warehouse button in the horizontal menu bar.




A pop-up grid displays with all warehouses and available quantity to could be selected for the item.



Selecting a warehouse with stock available will change the color of the line from yellow to white indicating it can be released and processed.

| | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| FPD | ☐ | Detroit | 1000809368 | Test 4 | | My Fulfillme... | All Fields 2014 | ... | 20180321-POD-3 | POD Item 3 | 44 | 44 | 99999999 |
| FPD | ☐ | Arlington | 1000809368 | Test 4 | | My Fulfillme... | All Fields 2014 | ... | 20180321-POD-4 | POD Item 4 | 99 | 99 | 99999999 |
| FPD | ☐ | Philly - 01 | 1000809368 | Test 4 | | My Fulfillme... | All Fields 2014 | ... | 20180321-POD-5 | POD Item 5 | 111 | 111 | 99999999 |
| C | ☐ | Iowa | 1000809368 | Test 4 | | My Fulfillme... | All Fields 2014 | ... | 20180321-CI-1 | FGCU | 16 | 16 | 14417 |
| FG | ☐ | Philly - 01 | 1000809368 | Test 4 | | My Fulfillme... | All Fields 2014 | ... | 20180321-FG-1 | FGCO ItemDESCR EDIT | 12 | 12 | 4720 |

The line now displays Philly – 01 instead of Iowa as the chosen warehouse.

Release the sales order. Commitments are created, pick ticket formats are selected per the FF Project, pick ticket data is compiled, and pick tickets are generated.

In our sales order, we now have two items coming from Philly – 01. We have the POD item that needs to be produced there and has the default location set on the item to drive the warehouse choice, and we have one pick and pack item that we changed the warehouse from Iowa where there was insufficient quantity to ship to Philly that has quantity on hand.

The pick ticket for Philly then looks like this:

efi print to win.

**Order #:** 1000809368
**Order Type:** Normal
**Order Date/Time:** 7/31/2018 12:00:43PM
**Release Date/Time:** 7/31/2018 12:40:04PM
**Date/Time Printed:** 7/31/2018 12:40:42PM
**Order Created By:** NORMA

**Ship To:**
**My Fulfillment Customer**
My Fulfillment Customer
104 Lincoln Blvd
Ames IA 50010
UNITED STATES

**Cust Order #:** Test 4
**Release Id #:** 91249
**Pack Slip #:** 264894
**Date Needed:**
**Ship Method:** UPS Ground (Sig)

**Ordered By:**
**My Fulfillment Customer**
104 Lincoln Blvd
Ames IA 50010
UNITED STATES

**Phone:**
**Fax:**
**Email:** norma.nelsen@efi.com
**Comments:**

**Phone:**
**Fax:**
**Email:** norma.nelsen@efi.com

| Warehouse | Inv Code | Description | Job # | Location | Order Qty | Unit Price | Discount | Total Price |
|---|---|---|---|---|---|---|---|---|
| Philly - 01 | 20180321-POD-5 | POD Item 5 | 4263 | POD PHILLY | 111 | 4.00 | 0.00 | 444.00 |
| Philly - 01 | 20180321-FG-1 | FGCO ItemDESCR EDIT | 4263 | 1.1.1.1 | 12 | 5.00 | 0.00 | 60.00 |

Iowa still gets the one pick and pack item where the ship to is mapped and there is sufficient stock to process.

efi print to win.

**Order #:** 1000809368
**Order Type:** Normal
**Order Date/Time:** 7/31/2018 12:00:43PM
**Release Date/Time:** 7/31/2018 12:40:04PM
**Date/Time Printed:** 7/31/2018 12:40:42PM
**Order Created By:** NORMA

**Ship To:**
**My Fulfillment Customer**
My Fulfillment Customer
104 Lincoln Blvd
Ames IA 50010
UNITED STATES

**Cust Order #:** Test 4
**Release Id #:** 91249
**Pack Slip #:** 264895
**Date Needed:**
**Ship Method:** UPS Ground (Sig)

**Ordered By:**
**My Fulfillment Customer**
104 Lincoln Blvd
Ames IA 50010
UNITED STATES

**Phone:**
**Fax:**
**Email:** norma.nelsen@efi.com
**Comments:**

**Phone:**
**Fax:**
**Email:** norma.nelsen@efi.com

| Warehouse | Inv Code | Description | Job # | Location | Order Qty | Unit Price | Discount | Total Price |
|---|---|---|---|---|---|---|---|---|
| Iowa | 20180321-CI-1 | FGCU | 4263 | 1.1.1.1 | 16 | 0.00 | 0.00 | 0.00 |

Arlington's POD item will be sent to that warehouse.

efi print to win.

**Order #:** 1000809368
**Order Type:** Normal
**Order Date/Time:** 7/31/2018 12:00:43PM
**Release Date/Time:** 7/31/2018 12:40:04PM
**Date/Time Printed:** 7/31/2018 12:40:42PM
**Order Created By:** NORMA

**Ship To:**
**My Fulfillment Customer**
My Fulfillment Customer
104 Lincoln Blvd
Ames IA 50010
UNITED STATES

**Cust Order #:** Test 4
**Release Id #:** 91249
**Pack Slip #:** 264896
**Date Needed:**
**Ship Method:** UPS Ground (Sig)

**Ordered By:**
**My Fulfillment Customer**
104 Lincoln Blvd
Ames IA 50010
UNITED STATES

**Phone:**
**Fax:**
**Email:** norma.nelsen@efi.com
**Comments:**

**Phone:**
**Fax:**
**Email:** norma.nelsen@efi.com

| Warehouse | Inv Code | Description | Job # | Location | Order Qty | Unit Price | Discount | Total Price |
|---|---|---|---|---|---|---|---|---|
| Arlington | 20180321-POD -4 | POD Item 4 | 4263 | POD ARLINGTON | 99 | 3.00 | 0.00 | 297.00 |

And Detroit's POD will be sent to Detroit.

efi print to win.

**Order #:** 1000809368
**Order Type:** Normal
**Order Date/Time:** 7/31/2018 12:00:43PM
**Release Date/Time:** 7/31/2018 12:40:04PM
**Date/Time Printed:** 7/31/2018 12:40:42PM
**Order Created By:** NORMA

**Ship To:**
**My Fulfillment Customer**
My Fulfillment Customer
104 Lincoln Blvd
Ames IA 50010
UNITED STATES

**Cust Order #:** Test 4
**Release Id #:** 91249
**Pack Slip #:** 264897
**Date Needed:**
**Ship Method:** UPS Ground (Sig)

**Ordered By:**
**My Fulfillment Customer**
104 Lincoln Blvd
Ames IA 50010
UNITED STATES

**Phone:**
**Fax:**
**Email:** norma.nelsen@efi.com
**Comments:**

**Phone:**
**Fax:**
**Email:** norma.nelsen@efi.com

| Warehouse | Inv Code | Description | Job # | Location | Order Qty | Unit Price | Discount | Total Price |
|---|---|---|---|---|---|---|---|---|
| Detroit | 20180321-POD-3 | POD Item 3 | 4263 | POD DETROIT | 44 | 2.00 | 0.00 | 88.00 |

Please note: Pick ticket reports can be edited to include the Warehouse at the line item level for easy identification of the intended warehouse. Printing profiles can be set up to print the pick tickets directly to that warehouse.

The Release Summary Report shows each pick ID.

## Release Summary Report

**Date/Time Printed:** 7/31/2018 12:47:07PM

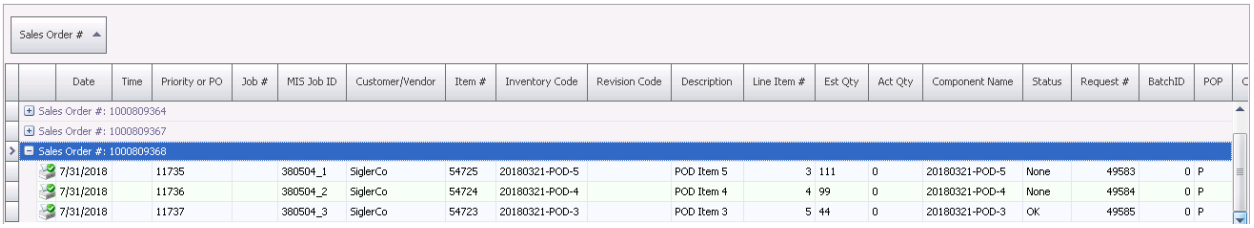
**Customer:** My Fulfillment Customer
**Project:** All Fields 2014
**Release ID:** 91249

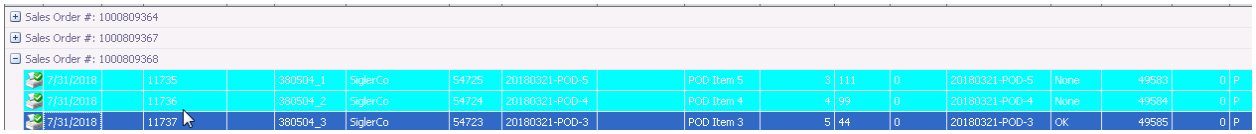
| Pick ID | Order # | Cust SO # | Job # | Ship To Name | Ship To Company | Order Type | Ship Method |
|---|---|---|---|---|---|---|---|
| 264894 | 1000809368 | Test 4 | 4263 | My Fulfillment Customer | My Fulfillment Customer | Normal | UPS Ground (Sig) |
| 264895 | 1000809368 | Test 4 | 4263 | My Fulfillment Customer | My Fulfillment Customer | Normal | UPS Ground (Sig) |
| 264896 | 1000809368 | Test 4 | 4263 | My Fulfillment Customer | My Fulfillment Customer | Normal | UPS Ground (Sig) |
| 264897 | 1000809368 | Test 4 | 4263 | My Fulfillment Customer | My Fulfillment Customer | Normal | UPS Ground (Sig) |

**Total # of Orders for Release:** 4

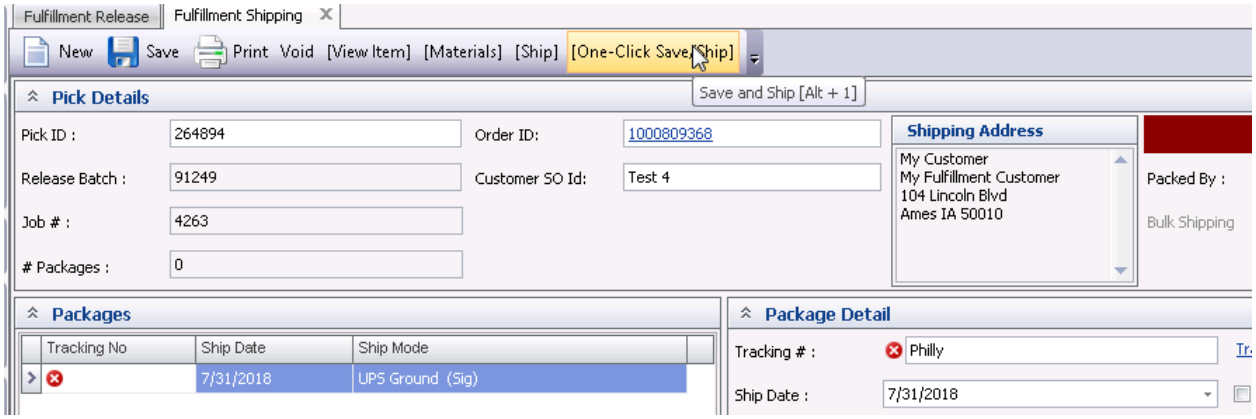
## Processing the Sales Order

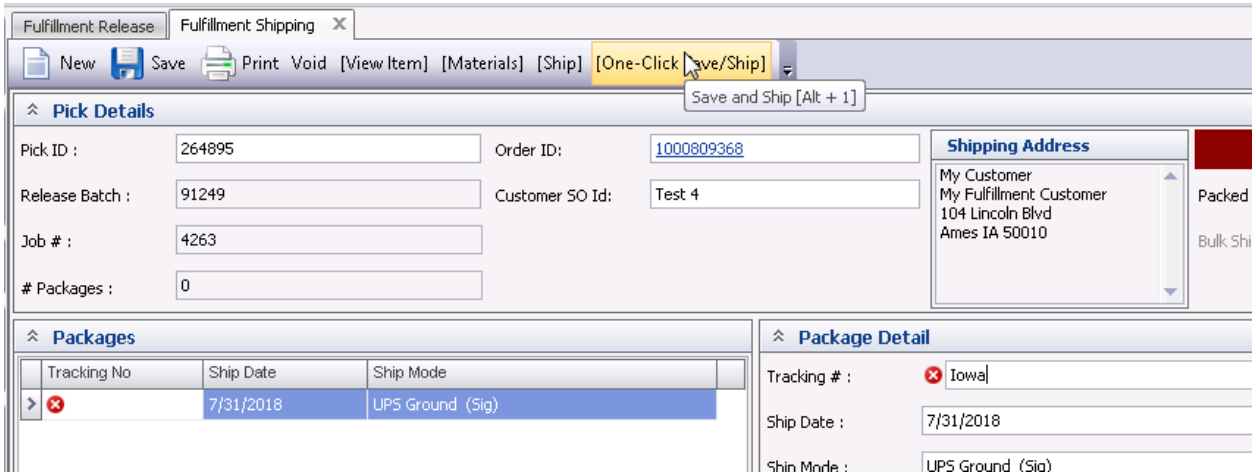
PODs would be received from the scheduled task screen.

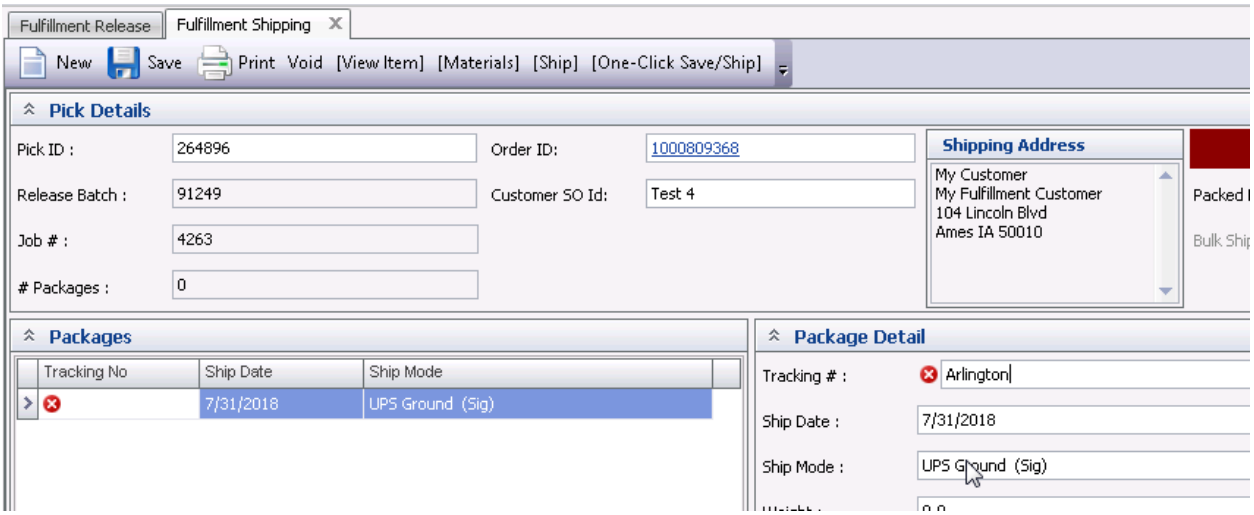


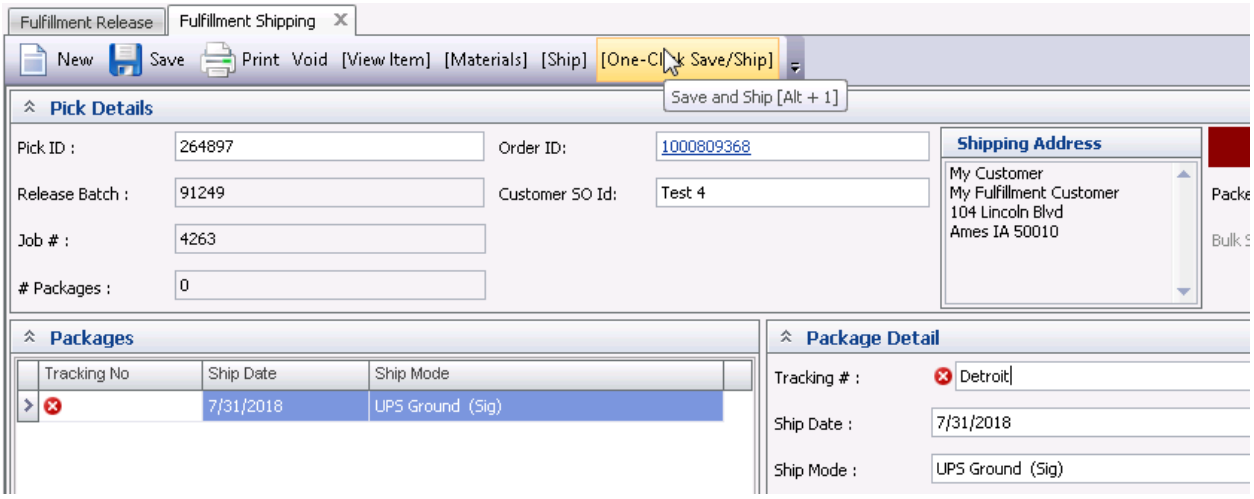




Sales Order (each Pick ID) can now be shipped.




Fulfillment Release
Fulfillment Shipping
New
Save
Print
Void
[View Item]
[Materials]
[Ship]
[One-Click Save/Ship]
Pick Details
Pick ID :
264896
Order ID:
1000809368
Release Batch :
91249
Customer SO Id:
Test 4
Job # :
4263
# Packages :
0
Shipping Address
My Customer
My Fulfillment Customer
104 Lincoln Blvd
Ames IA 50010
Packed
Bulk Ship
Packages
Tracking No
Ship Date
Ship Mode
7/31/2018
UPS Ground (Sig)
Package Detail
Tracking # :
Arlington
Ship Date :
7/31/2018
Ship Mode :
UPS Ground (Sig)


Fulfillment Release
Fulfillment Shipping
New
Save
Print
Void
[View Item]
[Materials]
[Ship]
[One-Click Save/Ship]
Save and Ship [Alt + 1]
Pick Details
Pick ID :
264897
Order ID:
1000809368
Release Batch :
91249
Customer SO Id:
Test 4
Job # :
4263
# Packages :
0
Shipping Address
My Customer
My Fulfillment Customer
104 Lincoln Blvd
Ames IA 50010
Packe
Bulk S
Packages
Tracking No
Ship Date
Ship Mode
7/31/2018
UPS Ground (Sig)
Package Detail
Tracking # :
Detroit
Ship Date :
7/31/2018
Ship Mode :
UPS Ground (Sig)

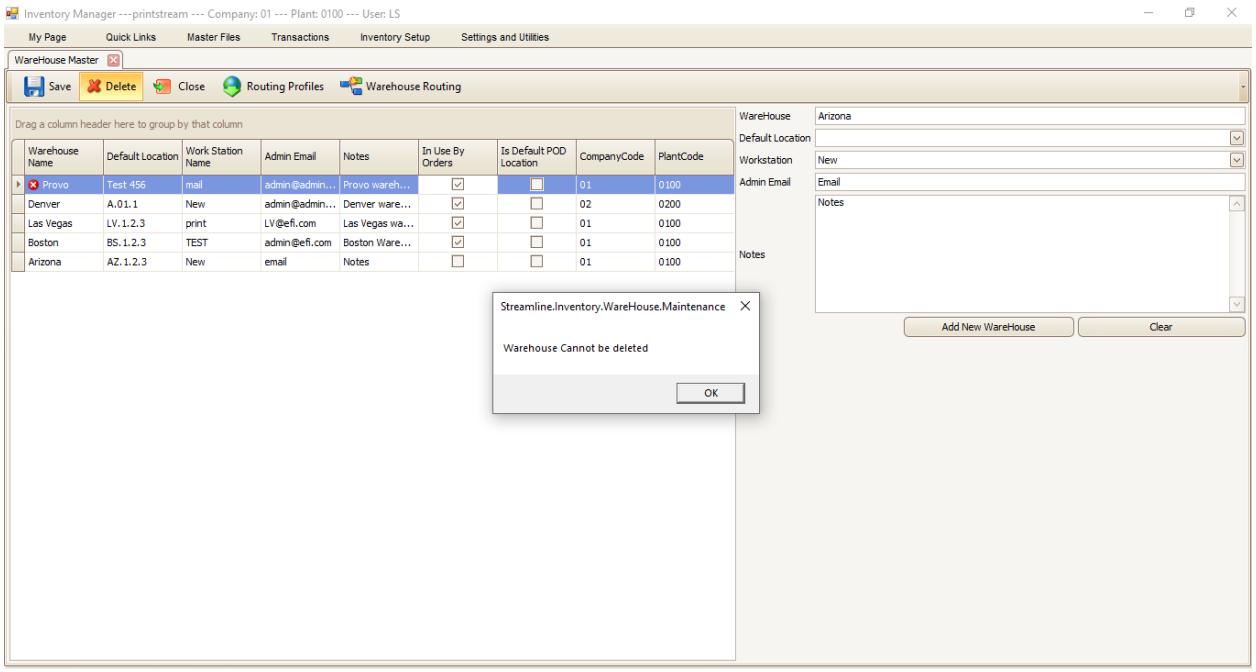
## Editing/Deleting a Warehouse

Warehouse settings (e.g. Default Location, Notes, etc.) can be edited by highlighting the warehouse in the grid and adjusting the grid entries. But again, note that edited settings are not saved until the “Save” is clicked.

There is one exception to the ability to edit a warehouse. If the warehouse has “in use by orders” field’s box checked – e.g. if it has locations with sales order commitments, then it will appear in the Warehouse grid with the “In Use by Orders” option checked (see screen shot below). Such a warehouse cannot have the Default Location entry edited. Commitments can be assigned based on the default location setting and editing this setting with existing commitments would cause logic issues.

A warehouse can be deleted by highlighting the line and clicking the “Delete” icon. This will also remove the warehouse links from any locations in Location Builder. There is no need to “Save” after a delete – in this case the warehouse is removed immediately.

There is again an exception if the warehouse has the “In Use By Orders’ option checked. Deletion of such a warehouse is disallowed.

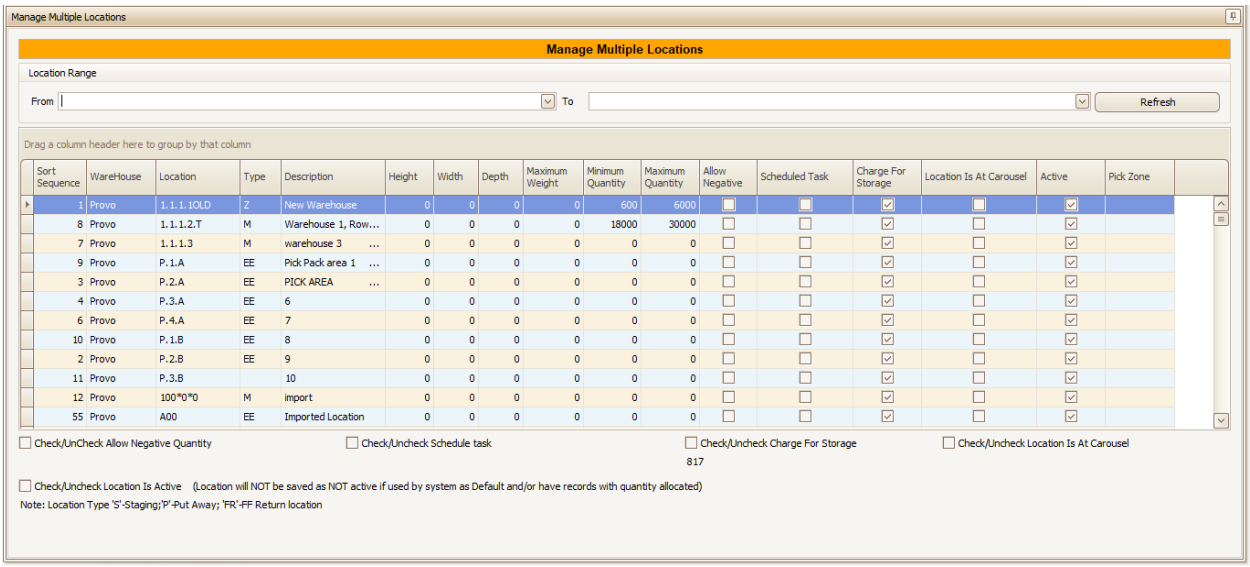


# Warehouse Fields for Locations

### View Manage Multiple Locations Program

When a new warehouse is saved, the defined default location of the warehouse is now automatically linked to the location in the Inventory Location Builder program.

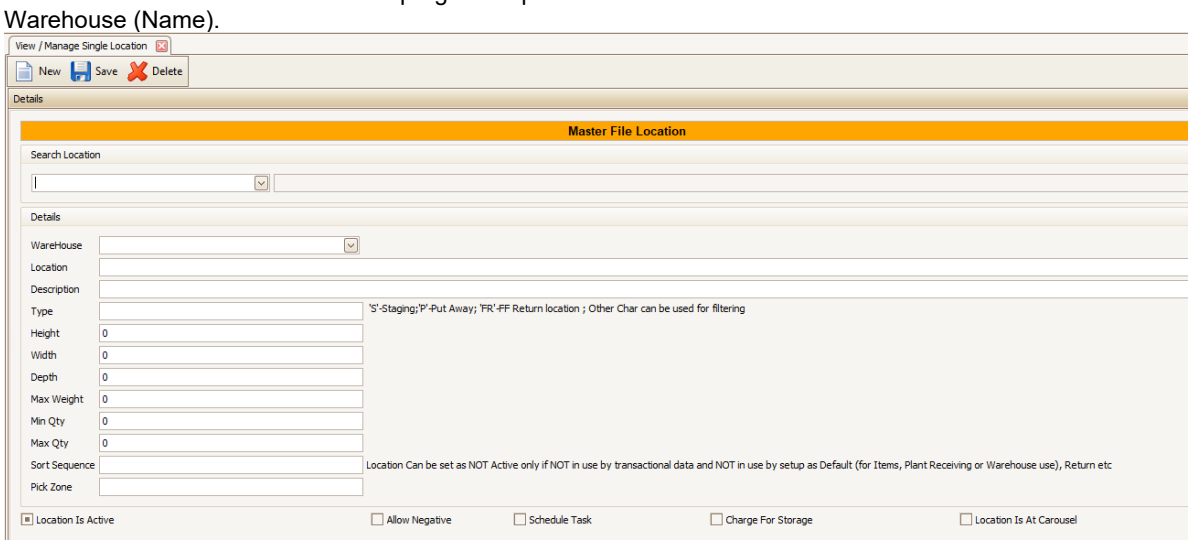
To link other warehouse location spaces to this newly defined warehouse, go into the 'View Manage Multiple Locations' program and use the right-click copy/paste functions to link other warehouse spaces. See below where all the locations starting with "WH" have been linked to warehouse "Document Warehouse". This can also be done by editing one location at a time using the 'Add/Manage Single Location' program.




| Sort Sequence | WareHouse | Location | Type | Description | Height | Width | Depth | Maximum Weight | Minimum Quantity | Maximum Quantity | Allow Negative | Scheduled Task | Charge For Storage | Location Is At Carousel | Active | Pick Zone |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Provo | 1.1.1.1OLD | Z | New Warehouse | 0 | 0 | 0 | 0 | 600 | 6000 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 8 | Provo | 1.1.1.2.T | M | Warehouse 1, Row... | 0 | 0 | 0 | 0 | 18000 | 30000 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 7 | Provo | 1.1.1.3 | M | warehouse 3 ... | 0 | 0 | 0 | 0 | 0 | 0 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 9 | Provo | P.1.A | EE | Pick Pack area 1 ... | 0 | 0 | 0 | 0 | 0 | 0 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 3 | Provo | P.2.A | EE | PICK AREA ... | 0 | 0 | 0 | 0 | 0 | 0 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 4 | Provo | P.3.A | EE | 6 | 0 | 0 | 0 | 0 | 0 | 0 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 6 | Provo | P.4.A | EE | 7 | 0 | 0 | 0 | 0 | 0 | 0 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 10 | Provo | P.1.B | EE | 8 | 0 | 0 | 0 | 0 | 0 | 0 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 2 | Provo | P.2.B | EE | 9 | 0 | 0 | 0 | 0 | 0 | 0 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 11 | Provo | P.3.B | | 10 | 0 | 0 | 0 | 0 | 0 | 0 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 12 | Provo | 100*0*0 | M | import | 0 | 0 | 0 | 0 | 0 | 0 | ☐ | ☐ | ☑ | ☐ | ☑ | |
| 55 | Provo | A00 | EE | Imported Location | 0 | 0 | 0 | 0 | 0 | 0 | ☐ | ☐ | ☑ | ☐ | ☑ | |

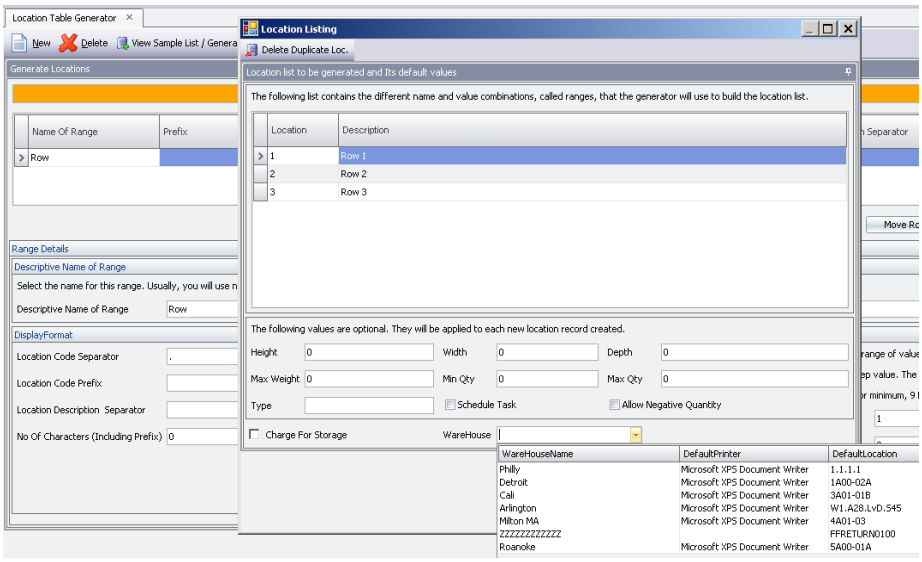
### Add/Manage Single Location Program

PrintStream databases that have the program in place will need to have all warehouse locations linked to a Warehouse (Name).



### Generate Locations Program

The ‘Generate Locations’ (Location Generator) will add a Warehouse entry to new locations as they are generated. The Warehouse drop down field is available in the Optional settings that get applied to the range of newly created locations.




### Location Import Program

Finally, the Location Import program import file now also accepts entries for WarehouseName and will populate the resulting locations accordingly. Note that the Warehouse Name must be defined in the system first in order to import.

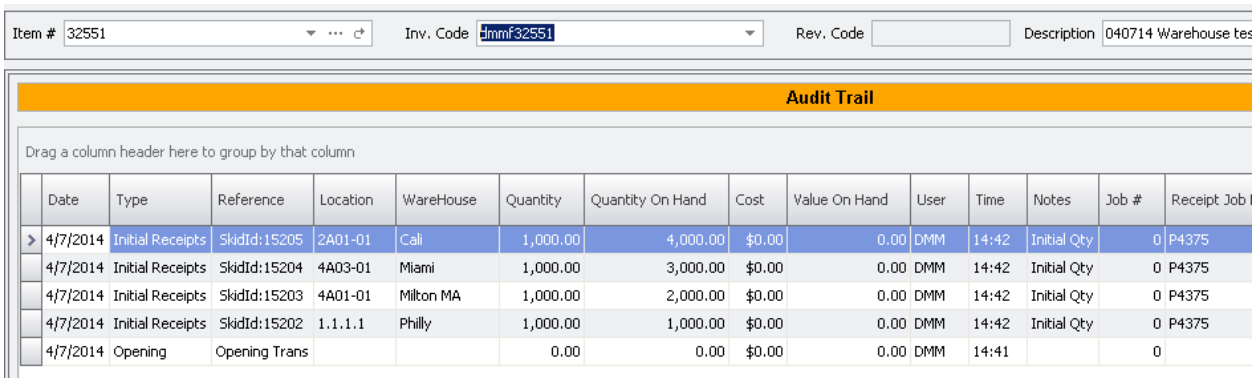
| | A | B | C | D | E | F | G | H | I | J | K | L | M | N |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | LOCATION | DESCRIPTION | AllowNegative | Depth | Height | MaxWeight | SortSequence | Type | Width | ChargeForStorage | ScheduleTask | MaximumQuantity | MinimumQuantity | WareHouseName |
| 2 | DMM1 | DMM1 Desc | Y | 5 | 6 | 1000 | 24 | S | 7 | Y | Y | 500 | 100 | Roanoke |
| 3 | DMM2 | | | | | | | | | | | | | Philly |
| 4 | DMM3 | DMM3 Desc | N | 5 | 6 | 1000 | 23 | Q | 7 | N | N | 500 | 100 | Philly |

# Warehouse Fields for Items and Transactions

There have been several changes in Inventory programs to include the Warehouse entry where appropriate. These include:

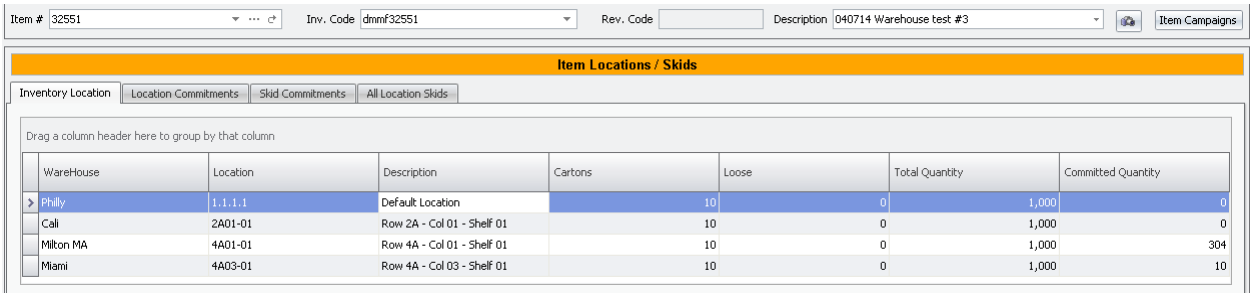
- Master File Inventory Audit Trail
- Master File Inventory Locations
- Transfers
- Returns
- Physical Count Reports
- Single Item Adjustments
- Receipts (in the drop down location selection)

### Master File Inventory Audit Trail



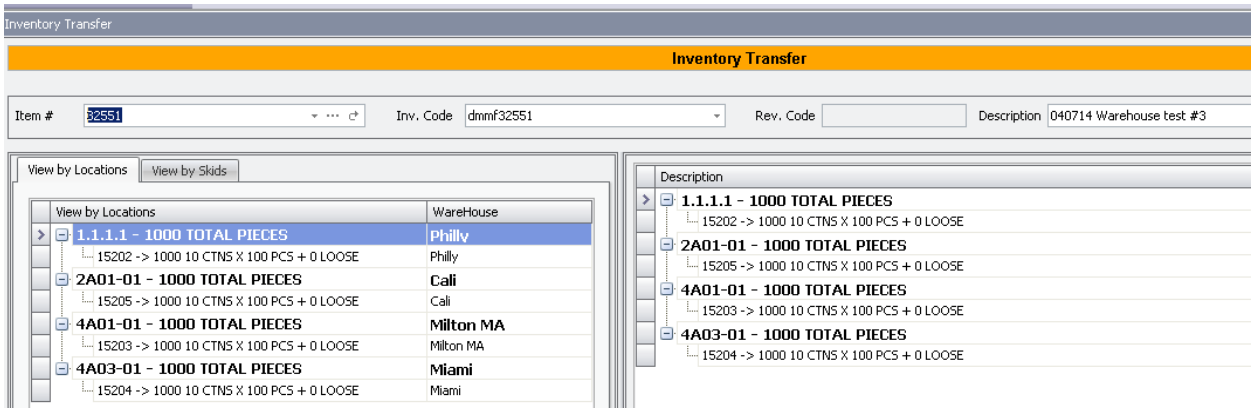

| Date | Type | Reference | Location | WareHouse | Quantity | Quantity On Hand | Cost | Value On Hand | User | Time | Notes | Job # | Receipt Job |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 4/7/2014 | Initial Receipts | SkidId:15205 | 2A01-01 | Cali | 1,000.00 | 4,000.00 | $0.00 | 0.00 | DMM | 14:42 | Initial Qty | 0 | P4375 |
| 4/7/2014 | Initial Receipts | SkidId:15204 | 4A03-01 | Miami | 1,000.00 | 3,000.00 | $0.00 | 0.00 | DMM | 14:42 | Initial Qty | 0 | P4375 |
| 4/7/2014 | Initial Receipts | SkidId:15203 | 4A01-01 | Milton MA | 1,000.00 | 2,000.00 | $0.00 | 0.00 | DMM | 14:42 | Initial Qty | 0 | P4375 |
| 4/7/2014 | Initial Receipts | SkidId:15202 | 1.1.1.1 | Philly | 1,000.00 | 1,000.00 | $0.00 | 0.00 | DMM | 14:42 | Initial Qty | 0 | P4375 |
| 4/7/2014 | Opening | Opening Trans | | | 0.00 | 0.00 | $0.00 | 0.00 | DMM | 14:41 | | 0 | |

### Master File Inventory Locations

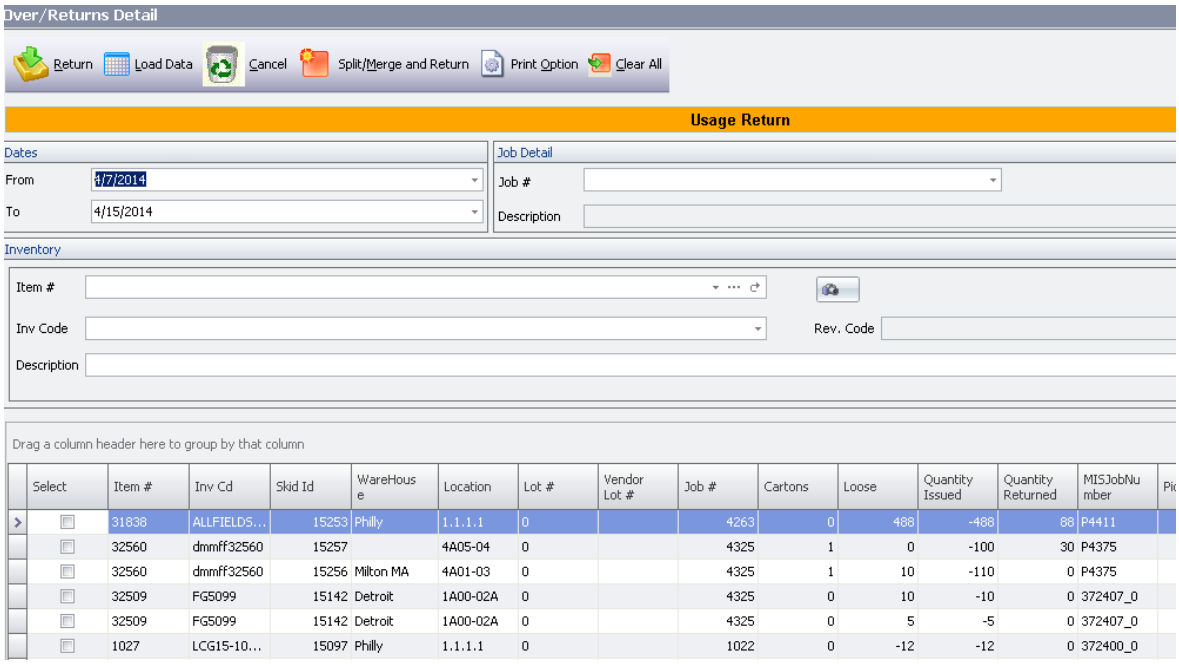



| WareHouse | Location | Description | Cartons | Loose | Total Quantity | Committed Quantity |
|---|---|---|---|---|---|---|
| Philly | 1.1.1.1 | Default Location | 10 | 0 | 1,000 | 0 |
| Cali | 2A01-01 | Row 2A - Col 01 - Shelf 01 | 10 | 0 | 1,000 | 0 |
| Milton MA | 4A01-01 | Row 4A - Col 01 - Shelf 01 | 10 | 0 | 1,000 | 304 |
| Miami | 4A03-01 | Row 4A - Col 03 - Shelf 01 | 10 | 0 | 1,000 | 10 |

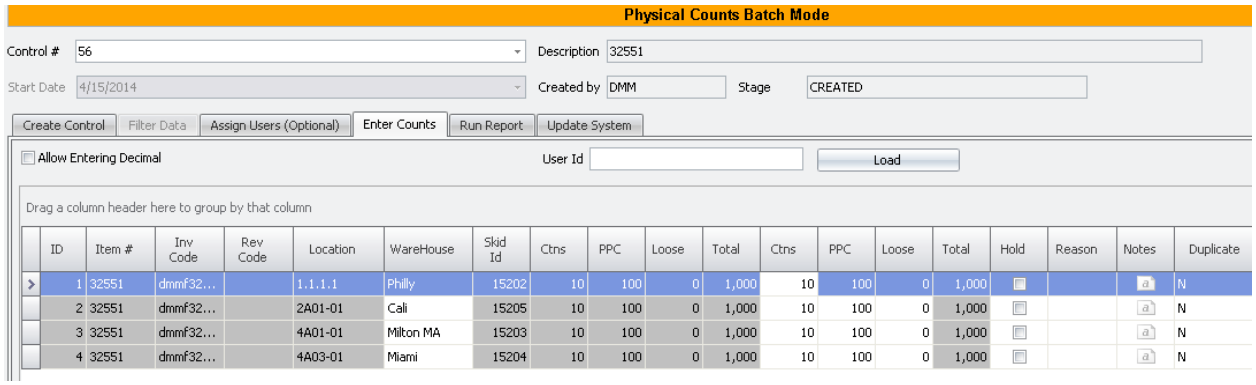
## Transfers



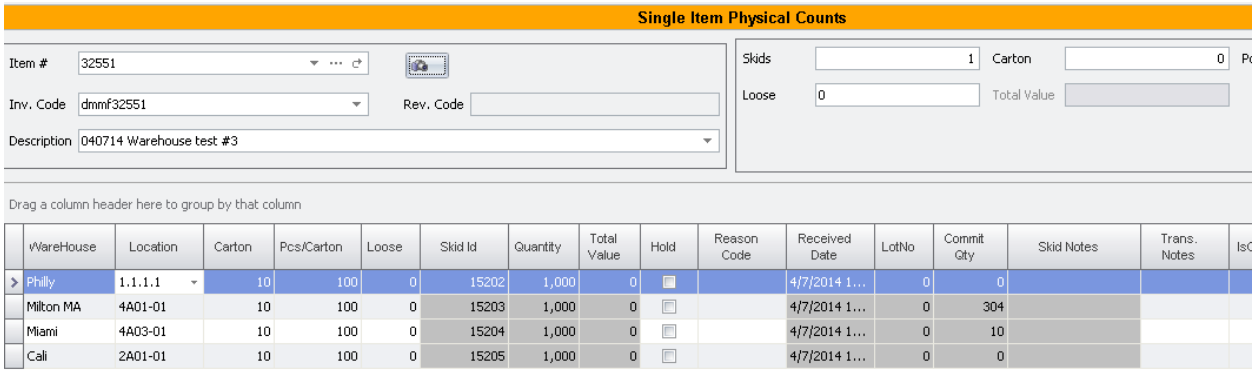

## Returns



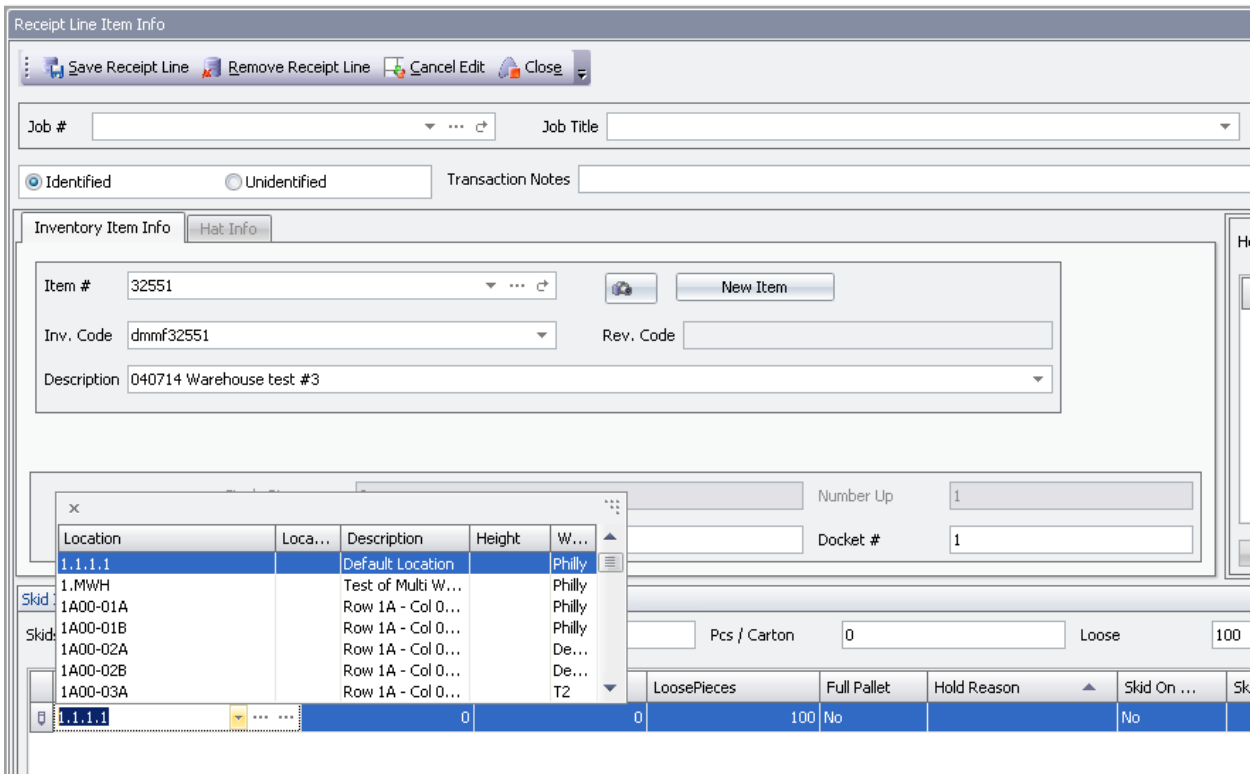

## Physical Count Report



## Single Item Adjustment



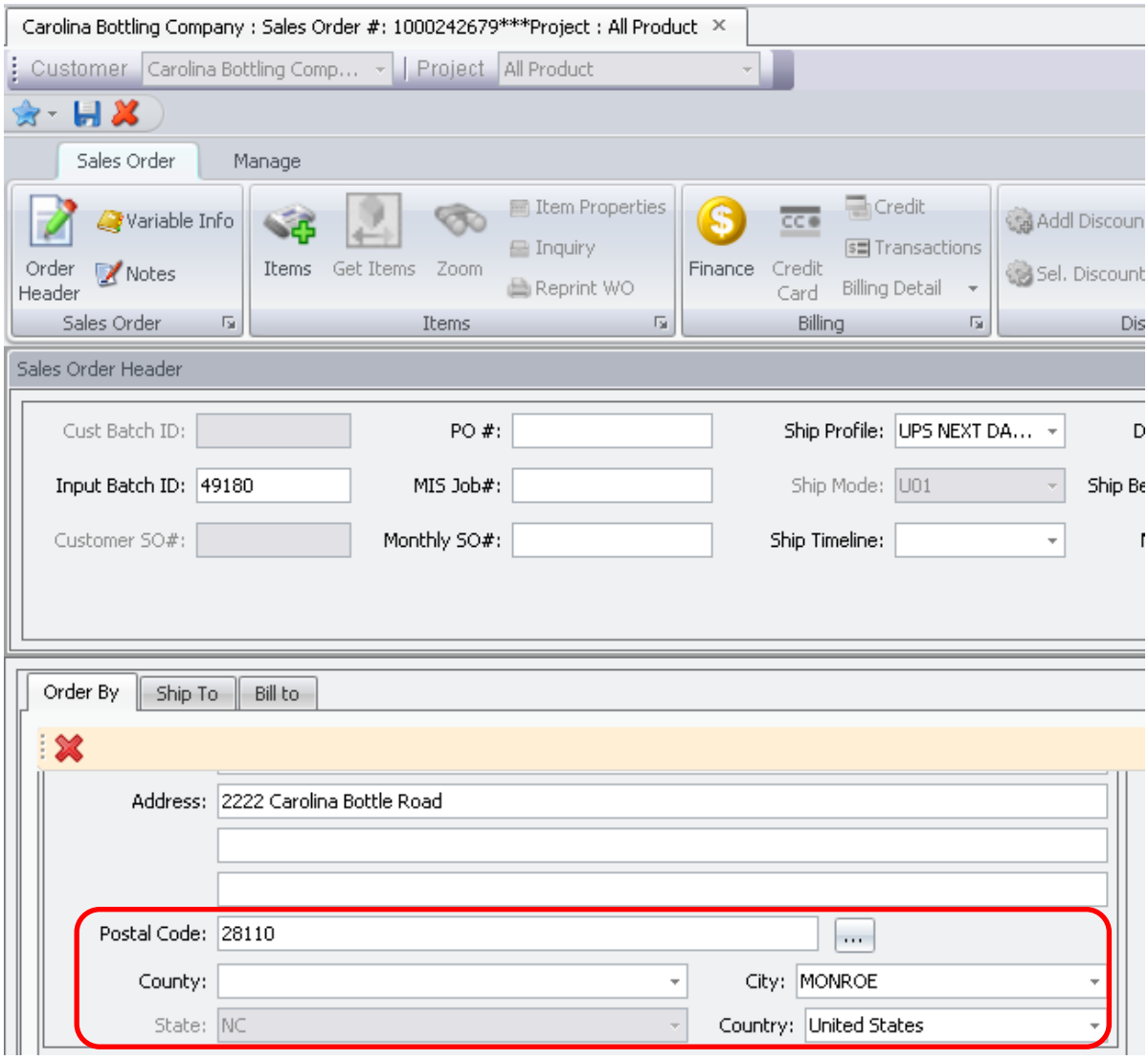

## Receipts

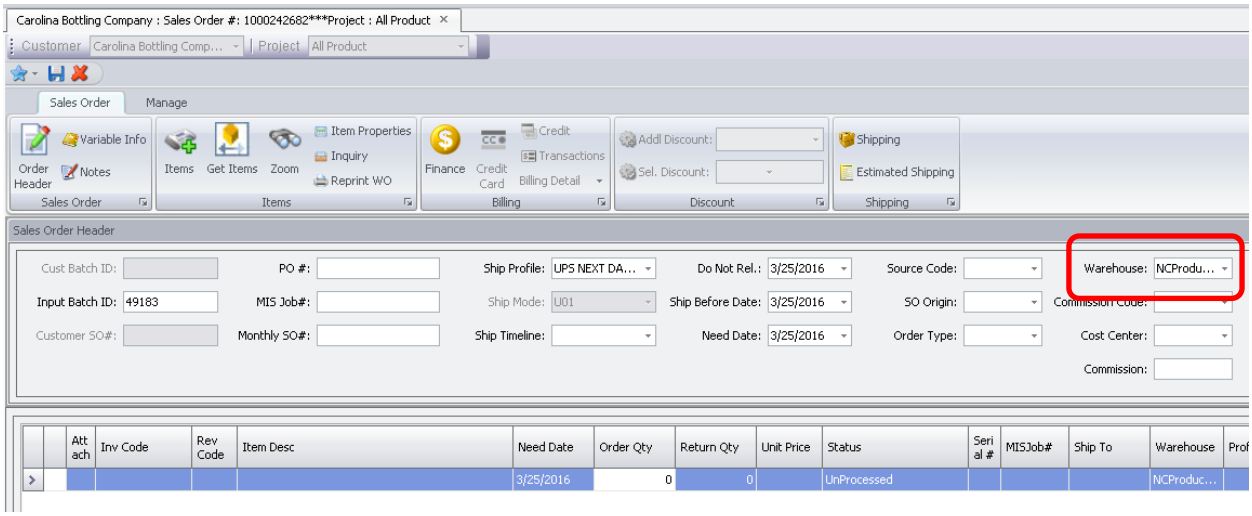


# Fulfillment - Sales Order Processing for Warehousing Usage

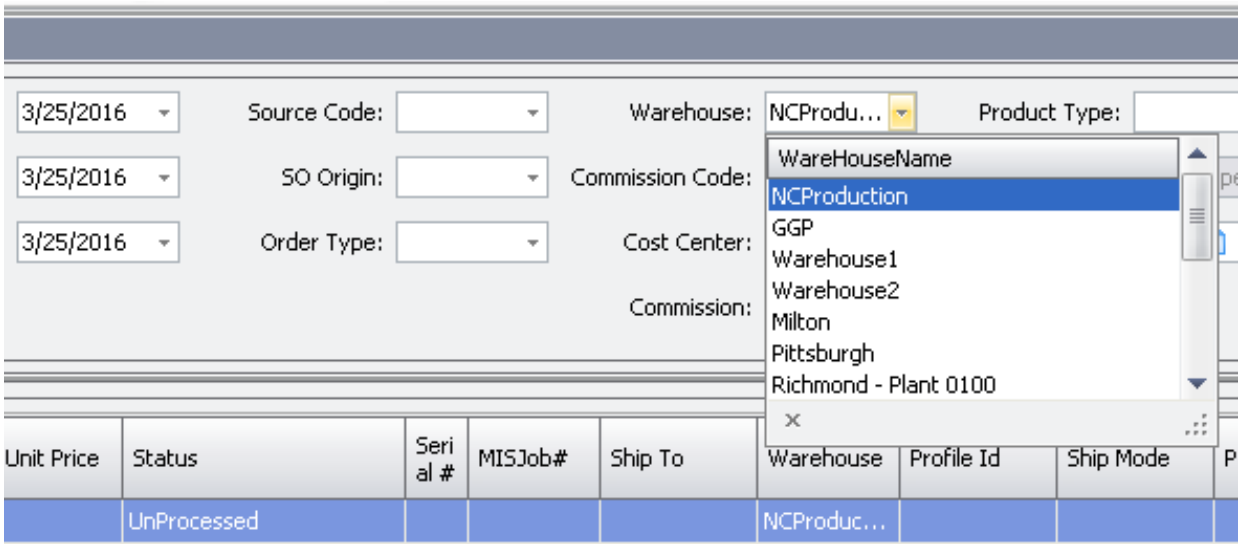
The assignment of sales orders to warehouse is based on the warehouse mapping definition and the Ship to Address of the sales order. The intent is that this assignment is generally invisible to the person entering the order – i.e. they can enter the order with its ship to without any knowledge of which warehouse will process it. However, The warehouse can be selected at Order Entry as well.

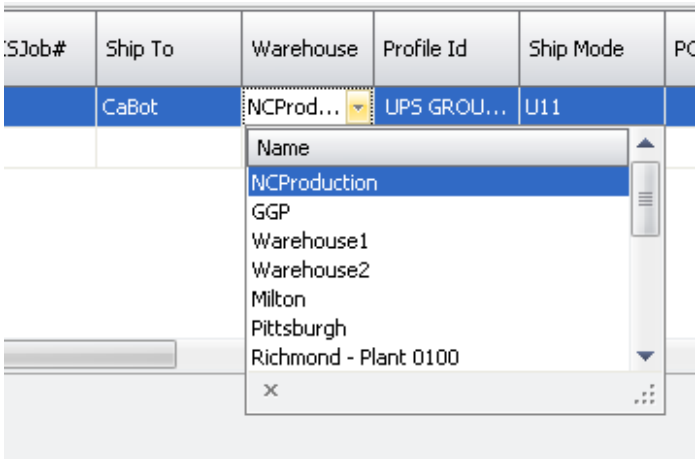
The order below has a Ship to address in North Carolina. Based on the warehouse mappings it will be assigned to the "NCProduction" warehouse. You will see in the get items header screen, that the warehouse is populated based off of the ship to address:






You do have the ability to select a different warehouse at order entry on both the order and line level:

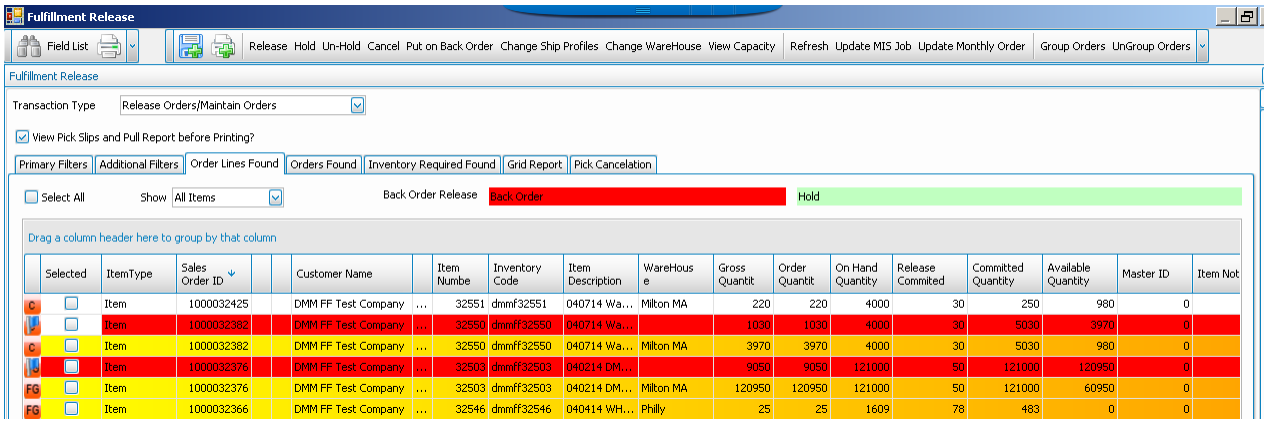


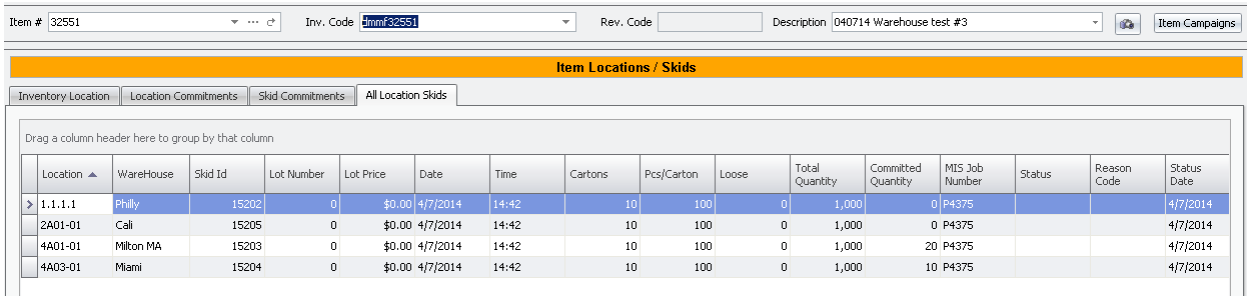



# Sales Order Release

The sales order in the screen shot above was saved (order #1000032425) and appears in the Fulfillment Release screen below as the top line. Note the following:

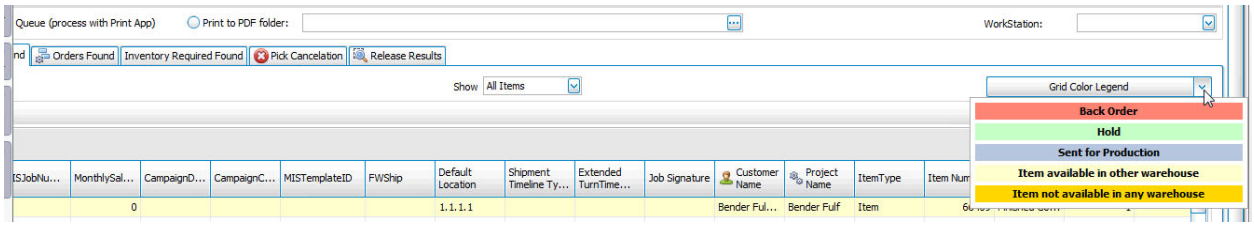
- The assigned Warehouse appears as a column in the 'Order Lines Found' tab.
- The "Available Quantity" entry is based on the Available **in that warehouse**, not for the item (see Location Detail below the Fulfillment Release screen shot).
- The entries for "On Hand Quantity", "Release Committed" and "Committed Quantity" are based on the item, not the warehouse location. This provides the user information that includes quantities in other warehouses, in case the order could be re-assigned elsewhere.
- Lines highlighted in yellow/orange are sales order lines where there is insufficient quantity in that warehouse to meet the request. These are candidates to be assigned to a different warehouse.
- Lines highlighted in red are sales order lines where there is insufficient item quantity to meet the request. These are likely to be back ordered (depending on the project setting). This programming was in place previously.



### Newly Added Order Lines Found Legend

In Suite 8.0 there has been a newly added Grid Color Legend added to help decipher line statuses of sales orders in the release grid.



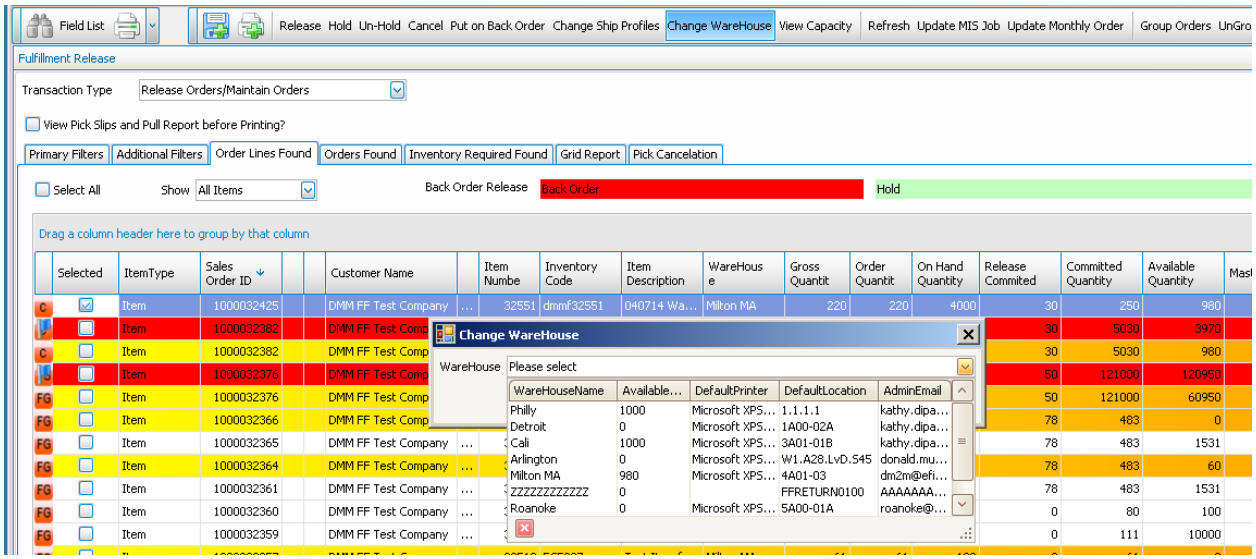

- Red - represents this order line is in backorder.
- Green - represents this order line is on hold.
- Blue - represents this order line has been sent for production using the Requires Product programming.
- Pale Yellow - represents the item is available in a different warehouse. Users can select these lines and change them to come from a warehouse where stock is available.
- Dark Yellow - represents an order line that had stock on hand to fulfill the order when the order was placed but subsequently the item quantity depleted either from a destroy or other sales orders processing, consuming the quantity in all warehouses below the quantity required for this order line. This order line will go to backorder for all pick rules except the No Back Orders rule.

Releasing a warehouse sales order line assigns the commitment to **just those warehouse locations** based on the pick method setting of the project for that order. So, if the location pick method is "Start DPL and rest in Location Alpha Order' then commitments will be made first to the warehouse DPL (**not** the item DPL) and then in warehouse location alpha order.

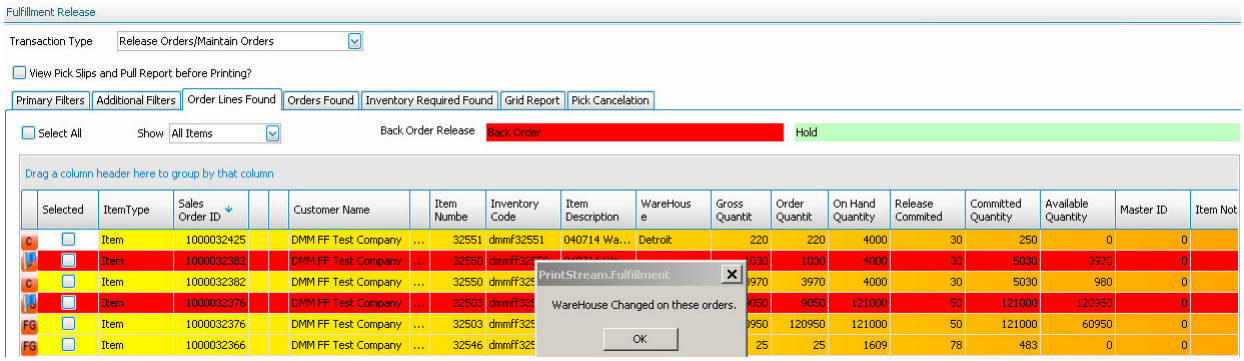
### Editing the Warehouse in Sales Order Release

The user can choose to assign the sales order line to another warehouse. This is accomplished by tagging the sales order line and clicking the 'Change Warehouse' button in the task bar. This will generate a drop down list of the warehouses for selection. Note that this drop down list displays the Available quantity in those warehouse for the item – **if only one line is tagged.** This allows the user a quick check to determine what warehouse would be appropriate.

If the user tags multiple lines, then the drop down list still generates but it will not display the Available quantity. Multiple lines could include multiple items and the field would not make sense. Selecting an alternate warehouse would assign fro all tagged lines.

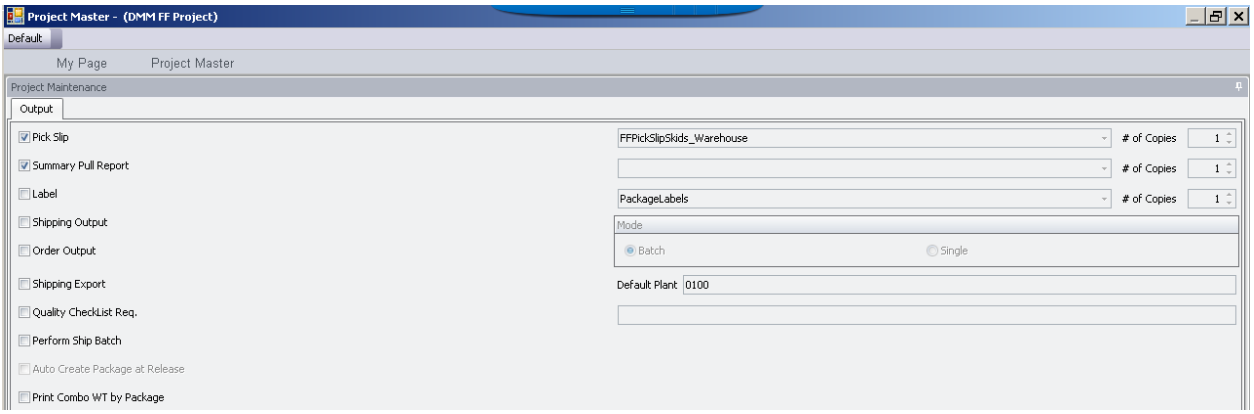


The top line was changed to warehouse “Detroit”. Note the yellow/orange highlight - this was an inappropriate change since the location has insufficient stock available to release.

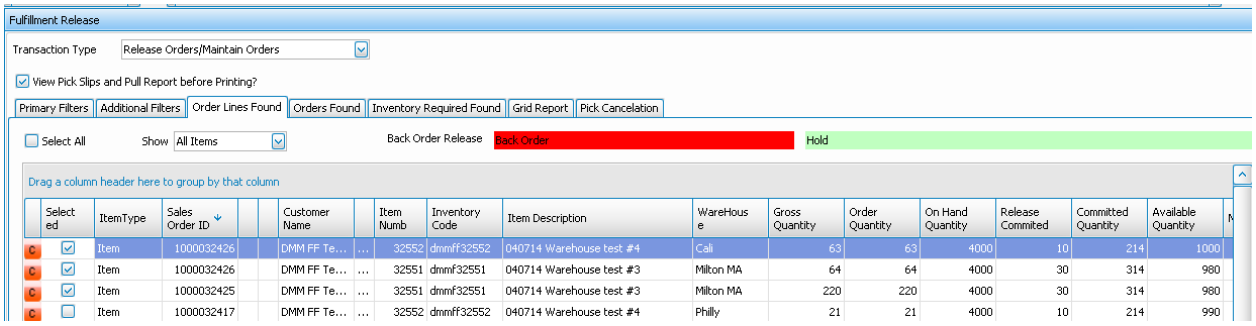


# Sales Order Release - Pick Slips

If so desired, the user can copy a system Pick Slip to create a new custom format which includes a notation indicating the Warehouse. A an example, the “FFPickSlipSkids_Warehouse” pick slip was created in our test system to include such a warehouse notation. It was then added to the Fulfillment project of the test sales orders.




Releasing sales order lines will generate separate pick slips for each <u>combination</u> of Sales order/warehouse. I tagged three lines below for sales order #100003246 (items 32551 and 32552) and sales order #100003245 (item #32551).




| Selected | ItemType | Sales Order ID | Customer Name | Item Numb | Inventory Code | Item Description | WareHouse | Gross Quantity | Order Quantity | On Hand Quantity | Release Commited | Committed Quantity | Available Quantity |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☑ | Item | 1000032426 | DMM FF Te… | 32552 | dmmff32552 | 040714 Warehouse test #4 | Cali | 63 | 63 | 4000 | 10 | 214 | 1000 |
| ☑ | Item | 1000032426 | DMM FF Te… | 32551 | dmmf32551 | 040714 Warehouse test #3 | Milton MA | 64 | 64 | 4000 | 30 | 314 | 980 |
| ☑ | Item | 1000032425 | DMM FF Te… | 32551 | dmmf32551 | 040714 Warehouse test #3 | Milton MA | 220 | 220 | 4000 | 30 | 314 | 980 |
| ☐ | Item | 1000032417 | DMM FF Te… | 32552 | dmmff32552 | 040714 Warehouse test #4 | Philly | 21 | 21 | 4000 | 10 | 214 | 990 |

This generated three pick slips – each of which indicates the warehouse . . .

**Order #:** 1000032425
**Order Type:** Normal
**Order Date/Time:** 4/15/2014 1:07:29PM
**Release Date/Time:** 4/15/2014 2:00:52PM
**Date/Time Printed:** 4/15/2014 2:01:06PM
**Order Created By:** DMM

**Ship To:**
**DMM FF Test Company**
DMM FF Test Company
510 Geen Hill Avenue
Milton MA 02186
UNITED STATES

**Phone:** 617-617-1111
**Fax:** 617-617-2222
**Email:** don.murray2@efi.com

Comments :

**Cust Order #:**
**Release Id #:** 2718
**Pack Slip #:** 13746
**Date Needed:** 4/15/2014
**Ship Method:** UPS Ground

**Ordered By:**
**DMM FF Test Company**
510 Geen Hill Avenue
Milton MA 02186
UNITED STATES

**Phone:** 617-617-1111
**Fax:** 617-617-2222
**Email:** don.murray2@efi.com

| Product # | Inv Code | Description | Job # | Skid # | Location | Cartons | Loose | Order Qty |
|---|---|---|---|---|---|---|---|---|
| 32551 | dmmf32551 | 040714 Warehouse test #3 | 4325 | | | | | 220 |
| Milton MA | | | | 15203 | 4A01-01 | 2 | 20 | 220 |

**Order #:** 1000032426
**Order Type:** Normal
**Order Date/Time:** 4/15/2014 1:53:54PM
**Release Date/Time:** 4/15/2014 2:00:53PM
**Date/Time Printed:** 4/15/2014 2:01:06PM
**Order Created By:** DMM

**Ship To:**
**DMM FF Test Company**
DMM FF Test Company
510 Geen Hill Avenue
Milton MA 02186
UNITED STATES

**Phone:** 617-617-1111
**Fax:** 617-617-2222
**Email:** don.murray2@efi.com

Comments :

**Cust Order #:**
**Release Id #:** 2718
**Pack Slip #:** 13747
**Date Needed:** 4/15/2014
**Ship Method:** UPS Ground

**Ordered By:**
**DMM FF Test Company**
510 Geen Hill Avenue
Milton MA 02186
UNITED STATES

**Phone:** 617-617-1111
**Fax:** 617-617-2222
**Email:** don.murray2@efi.com

| Product # | Inv Code | Description | Job # | Skid # | Location | Cartons | Loose | Order Qty |
|---|---|---|---|---|---|---|---|---|
| 32552 | dmmff32552 | 040714 Warehouse test #4 | 4325 | | | | | 63 |
| Cali | | | | 15209 | 2A01-01 | 0 | 63 | 63 |

**Order #:** 1000032426
**Order Type:** Normal
**Order Date/Time:** 4/15/2014 1:53:54PM
**Release Date/Time:** 4/15/2014 2:00:53PM
**Date/Time Printed:** 4/15/2014 2:01:06PM
**Order Created By:** DMM

**Ship To:**
**DMM FF Test Company**
DMM FF Test Company
510 Geen Hill Avenue
Milton MA 02186
UNITED STATES

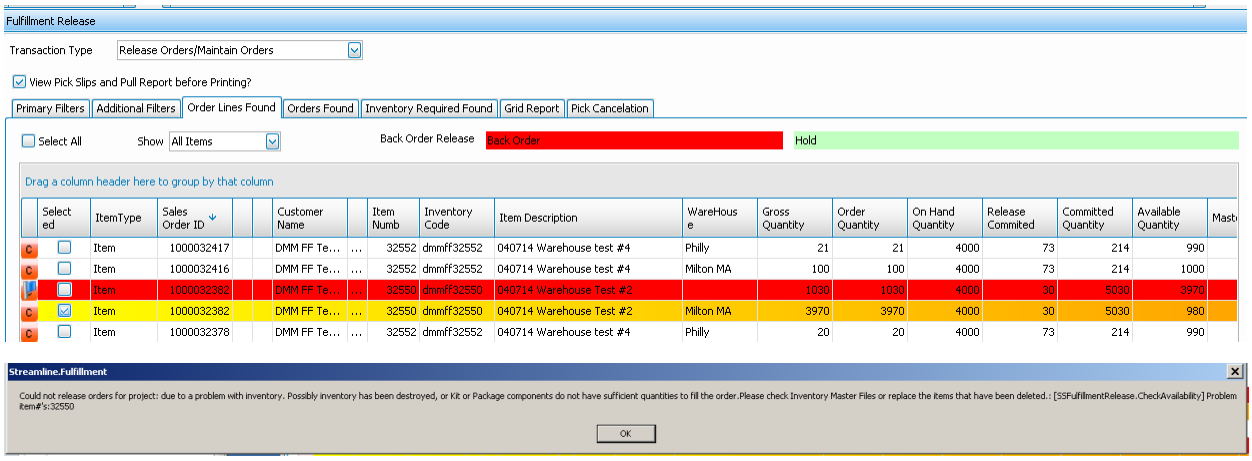
**Phone:** 617-617-1111
**Fax:** 617-617-2222
**Email:** don.murray2@efi.com

**Cust Order #:**
**Release Id #:** 2718
**Pack Slip #:** 13748
**Date Needed:** 4/15/2014
**Ship Method:** UPS Ground

**Ordered By:**
**DMM FF Test Company**
510 Geen Hill Avenue
Milton MA 02186
UNITED STATES

**Phone:** 617-617-1111
**Fax:** 617-617-2222
**Email:** don.murray2@efi.com

Comments :

| Product # | Inv Code | Description | Job # | Skid # | Location | Cartons | Loose | Order Qty |
|---|---|---|---|---|---|---|---|---|
| 32551 | dmmf32551 | 040714 Warehouse test #3 | 4325 | | | | | 64 |
| Milton MA | | | | 15203 | 4A01-01 | 0 | 64 | 64 |

A user will not be able to release a warehouse order if there is insufficient stock in the warehouse. If multiple sales order lines are tagged and one has insufficient stock then the whole release will be disallowed. The user can either place the sales order line on back order, leave it as is or assign it to a warehouse location that has sufficient stock.