



## 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

|   |  |
|---|--|
| <b>US Phone:</b>  | 855.334.4457 (first select option 3, then press option 8, then press option 1)   |
| <b>US Fax:</b>  | 415.233.4157   |
| <b>US E-mail:</b>   | <a href="mailto:printstream.support@efi.com">printstream.support@efi.com</a>   |
| 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. |  |
| <b>Note</b>   | 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. |

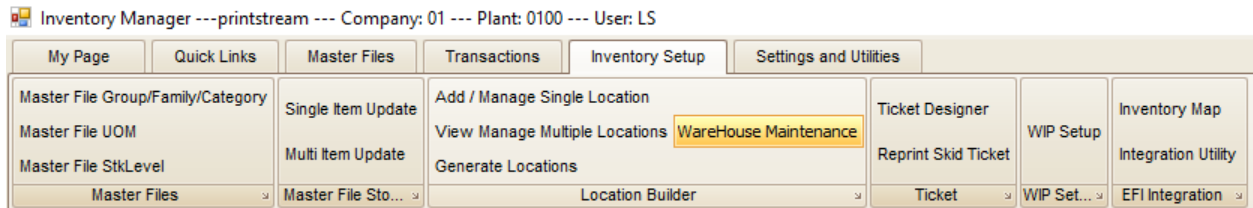
### EFI Professional Services

|                  |  |
|------------------|--|
| <b>US Phone:</b> | 651.365.5321   |
| <b>US Fax:</b>   | 651.365.5334   |
| <b>E-Mail:</b>   | <a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a> |

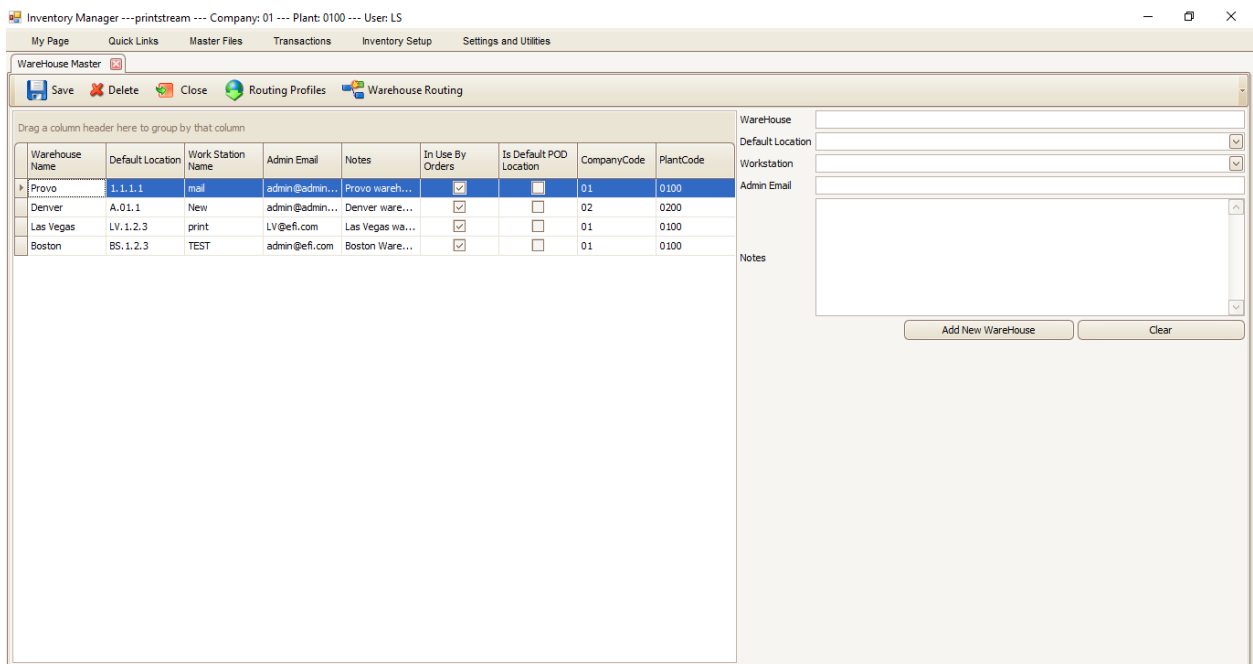
EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

## Warehouse Maintenance

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

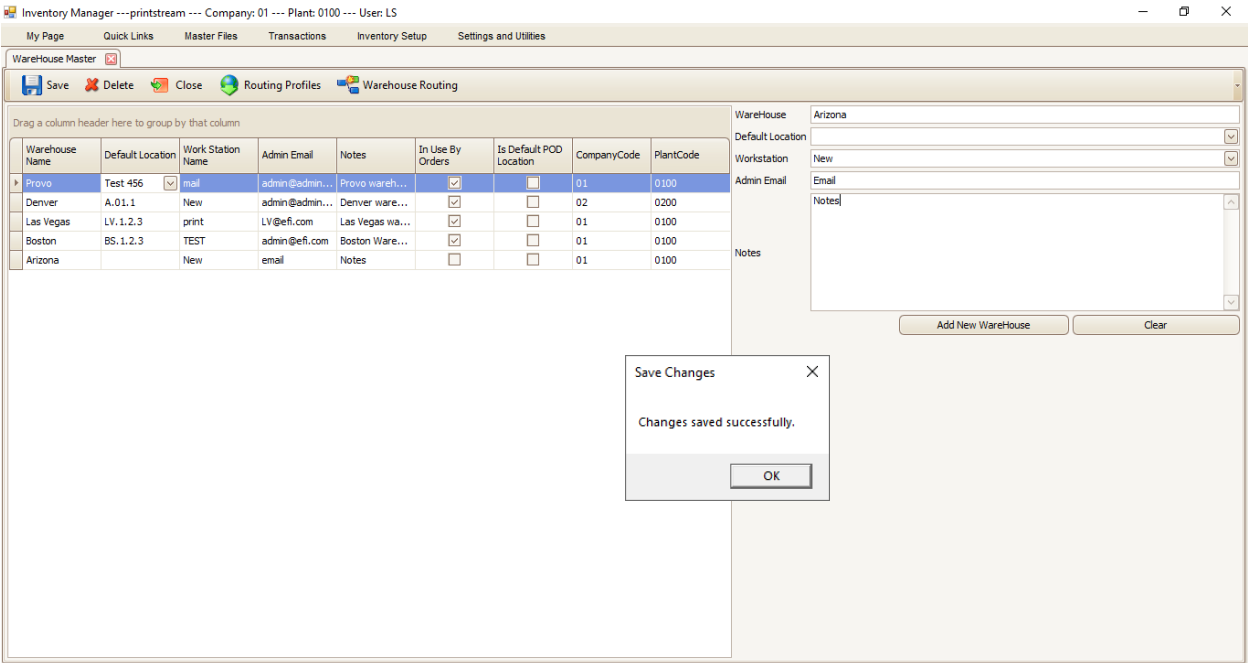


In this example, several warehouses have already been defined. In a new database the grid on the left would be blank.



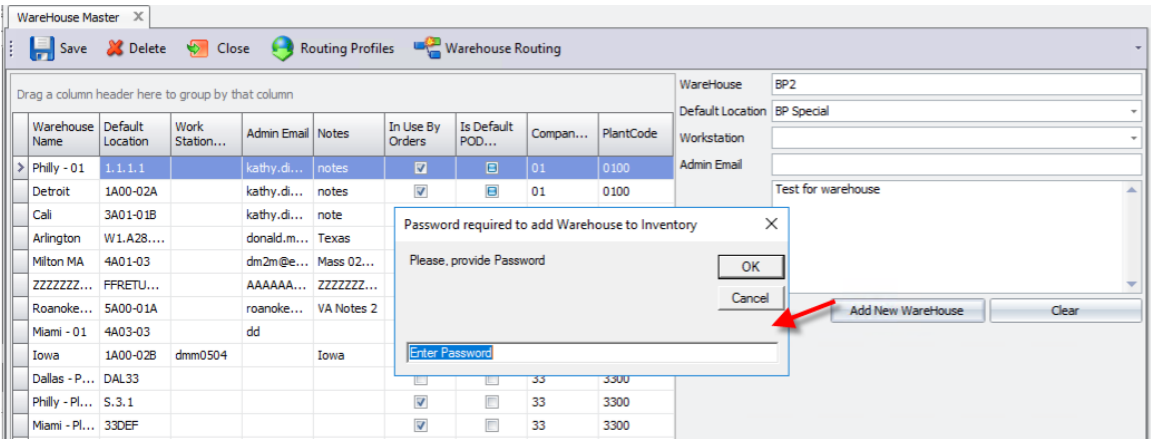
## Creating a New Warehouse

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

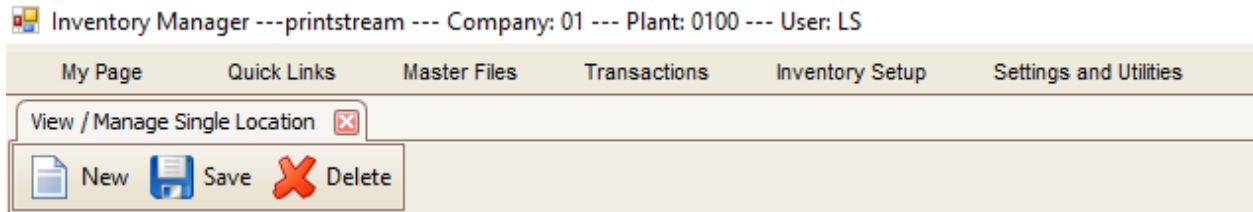
Password protection to “Warehouse Master” to avoid the unlimited creation of warehouses.



## 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:

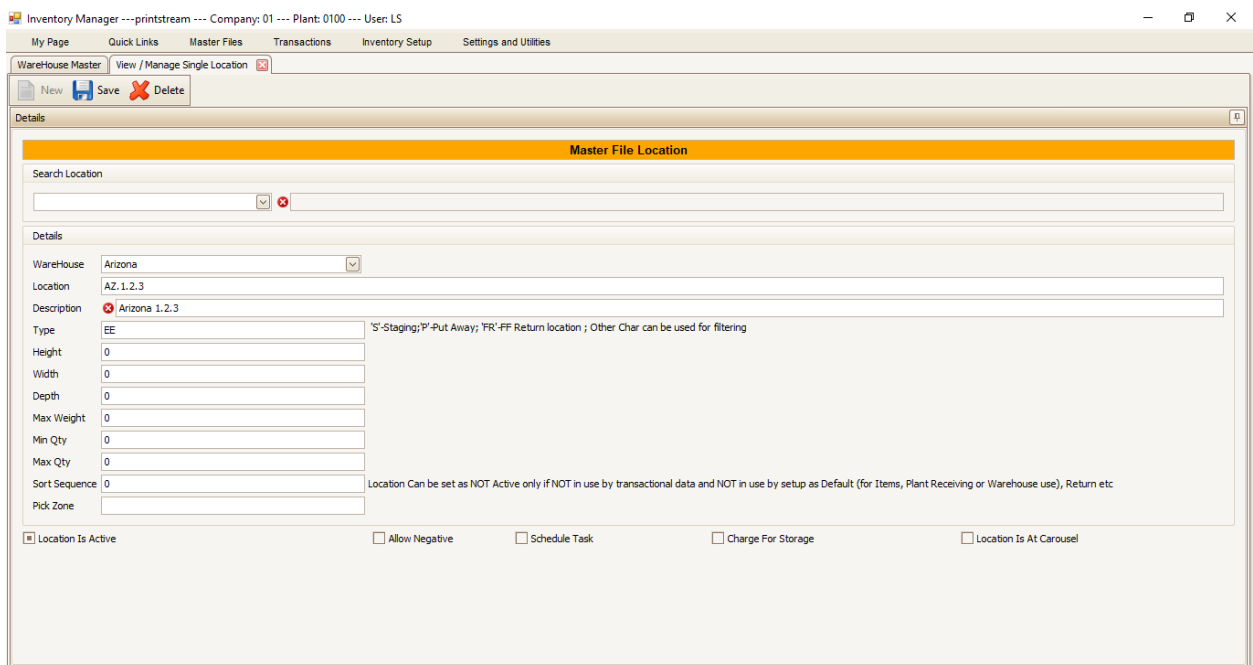
Location – this is a 15-character code which defines the warehouse space

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.

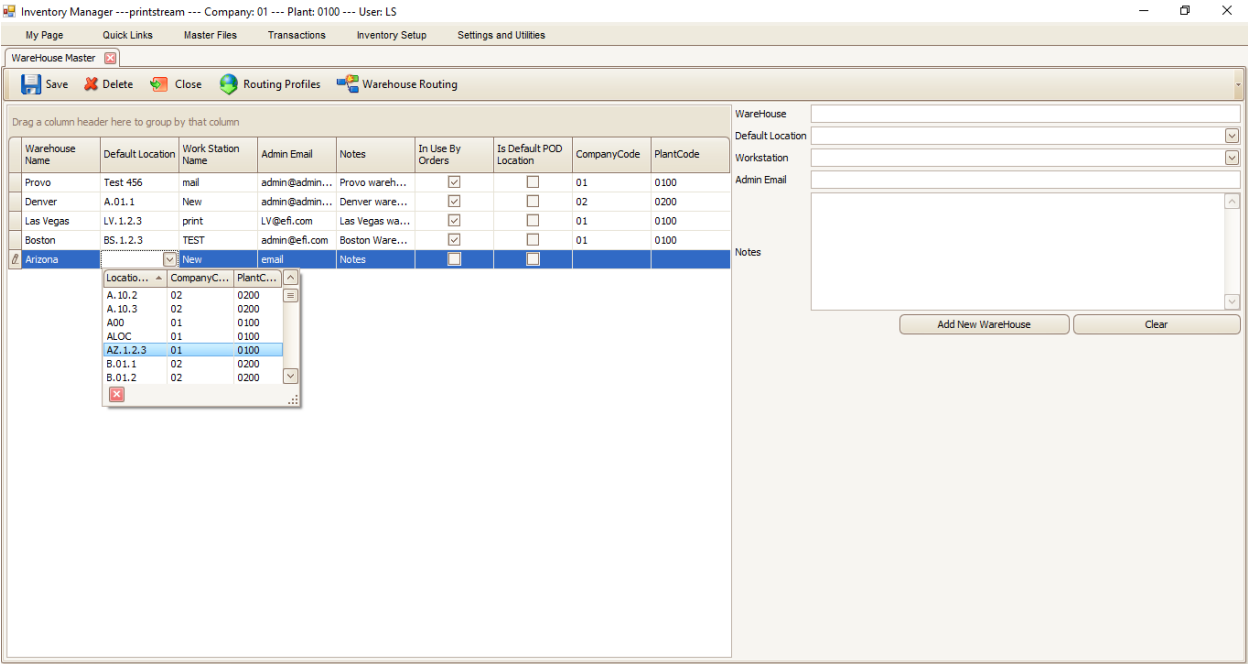


Save the new default pick location for the new warehouse.

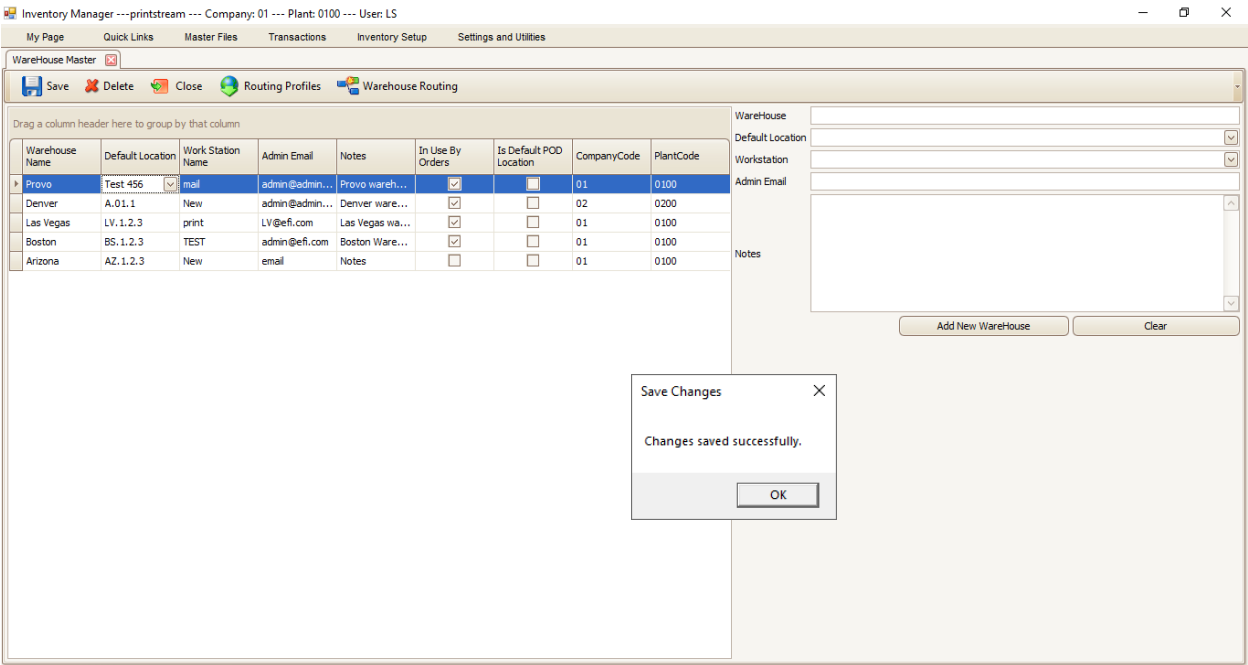
# Linking a New Default Pick Location to the New Warehouse

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.

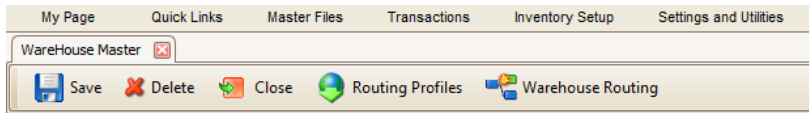
## Order Routing Functionality

### 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.

**Routing Profiles**

Save Add Profile Delete Profile Cancel

Drag a column header here to group by that column

| Profile Name       | Profile Description            | Is Default                          |
|--------------------|--------------------------------|-------------------------------------|
| a                  | b                              | <input type="checkbox"/>            |
| Brian POD          | POD                            | <input type="checkbox"/>            |
| > Default Profile  | Default Profile                | <input checked="" type="checkbox"/> |
| DMM Test Profile   | 082615 Test Profile            | <input type="checkbox"/>            |
| Inactive Profile 3 | Inactive Profile Description 8 | <input type="checkbox"/>            |

**Routing Profile Detail**

Profile Name: Default Profile ☒ Active

Profile Description: Default Profile

**Profile Options**

☒ This is the Default Profile

☐ Route POD Items to other Warehouses

**Profile Notes**

Default Profile

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 linked 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).

Project Master - Alaska Inc. (CL Test Project)

Customer: Alaska Inc. [ALASKA] Project: CL Test Project Inactive Projects?

My Page Project Master

Project Maintenance

Inventory Preference Auto Add Items

Commit Inventory At:

☐ Order Time ☐ Release ☒ Release To P5 ☐ Work Orders

Packing Materials

Pick Confirmation Required? No ☐ Recording Required?

☐ Pick Order Req'd Before Pick Confirmation?

Issue Inventory (and Packing Material if used) At:

☒ Printstream Shipping ☐ Pick Confirmation

Picking Rules

Pick Method: Start DPL and rest in Loc Alpha Order

Skid Pick Method: None / Default Skid Id

Carton Opening: None

Warehouse Routing Profile

Routing Profile

| Profile Name       | Profile Description            | Is Default | Is Active |
|--------------------|--------------------------------|------------|-----------|
| a                  | b                              | False      | False     |
| Brian POD          | POD                            | False      | True      |
| Default Profile    | Default Profile                | True       | True      |
| DMM Test Profile   | 082615 Test Profile            | False      | True      |
| Inactive Profile 3 | Inactive Profile Description 8 | False      | True      |

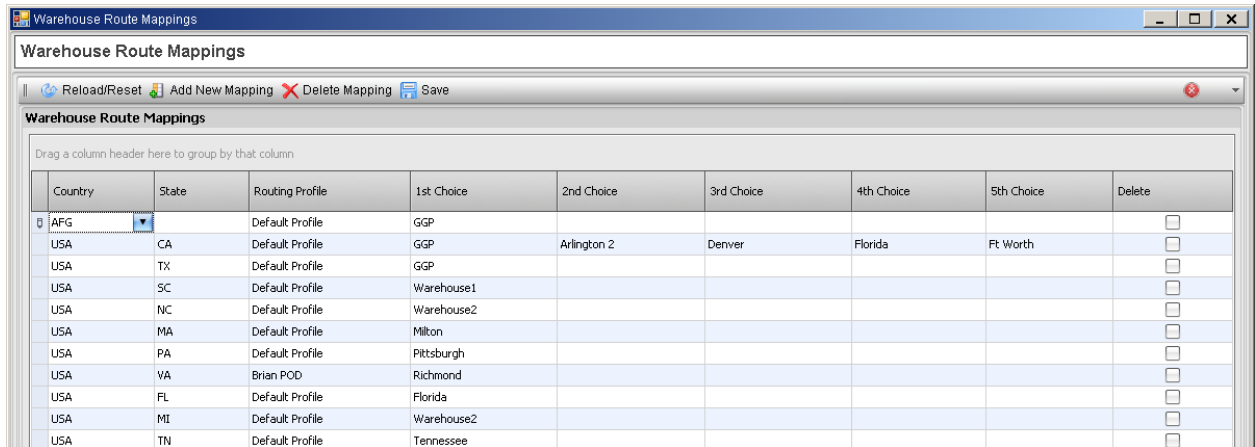
Status

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.

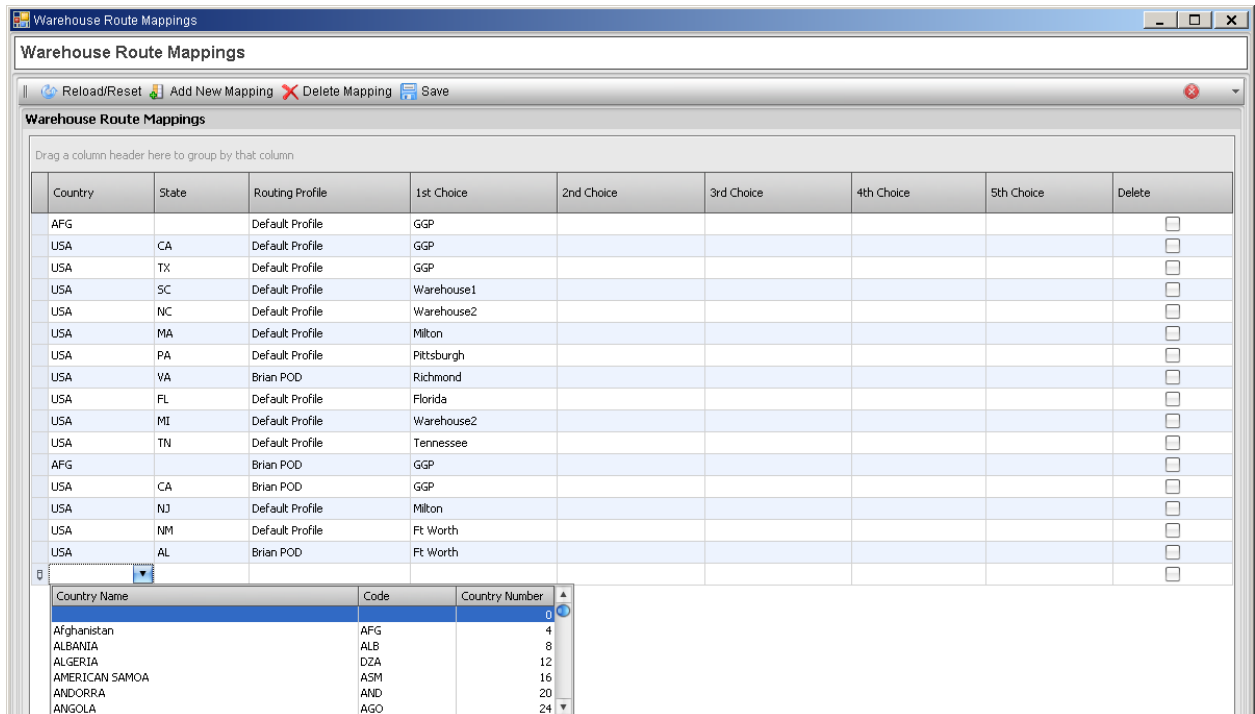
## Warehouse Routing



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.



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



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 Master

Save Delete Close Routing Profiles Warehouse Routing

Drag a column header here to group by that column

| 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        | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
| Detroit           | 1A00-02A         |                   | kathy.dipaolo... | notes        | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
| Cali              | 3A01-01B         |                   | kathy.dipaolo... | note         | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
| Arlington         | W1.A28.LvD....   |                   | donald.murra...  | Texas        | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
| Milton MA         | 4A01-03          |                   | dm2m@efi.com     | Mass 02186   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
| ZZZZZZZZZZZZ      | FFRETURN0100     |                   | AAAAAAAAA...     | ZZZZZZZZZZZZ | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
| Roanoke VA        | 5A00-01A         |                   | roanoke2@ef...   | VA Notes 2   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
| Miami - 01        | 4A03-03          |                   | dd               |              | <input type="checkbox"/>            | <input type="checkbox"/> | 01          | 0100      |
| Iowa              | 1A00-02B         | dmm0504           |                  | Iowa         | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
| Dallas - Plant 33 | DAL33            |                   |                  |              | <input type="checkbox"/>            | <input type="checkbox"/> | 33          | 3300      |
| Philly - Plant 33 | 5.3.1            |                   |                  |              | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 33          | 3300      |
| Miami - Plant 33  | 33DEF            |                   |                  |              | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 33          | 3300      |
| BigAndNice        | BigAndNice       |                   |                  |              | <input type="checkbox"/>            | <input type="checkbox"/> | 01          | 0100      |
| Cali - Plant 0200 | IN2 -1.1.1.1     |                   |                  |              | <input type="checkbox"/>            | <input type="checkbox"/> | 01          | 0200      |
| CANADAONLY        | CAN1             |                   |                  |              | <input type="checkbox"/>            | <input type="checkbox"/> | 01          | 0100      |
| Cincinnati        | NWH              |                   | norma.nelsen...  |              | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 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.

Routing Profiles

Save Add Profile Delete Profile Cancel

Routing Profiles

Drag a column header here to group by that column

| Profile Name      | Profile Description | Is Default                          |
|-------------------|---------------------|-------------------------------------|
| > Default Profile | Default Profile     | <input checked="" type="checkbox"/> |
| Nebraska Profile  | Nebraska Profile    | <input type="checkbox"/>            |

Routing Profile Detail

Profile Name: Default Profile ☒ Active

Profile Description: Default Profile

Profile Options

☒ This is the Default Profile

☐ Route POD Items to other Warehouses

Profile Notes

Default Profile

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.

View / Manage Single Location X

New Save Delete

Details

Master File Location

Search Location

POD ARLINGTON POD Arlington

| Location      | Description   |
|---------------|---------------|
| POD ARLINGTON | POD Arlington |
| POD DETROIT   | POD Detroit   |
| POD PHILLY    | POD Philly    |

X

View / Manage Single Location X

New Save Delete

Details

Master File Location

Search Location

POD ARLINGTON POD Arlington

Details

Warehouse Arlington

Location POD ARLINGTON

Description POD Arlington

Type 'S'-Staging; 'P'-Put Away; 'FR'-FF Return location ; Other Char can be used for filtering

Height n

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

View / Manage Single Location Warehouse Master X

Save Delete Close Routing Profiles Warehouse Routing

Drag a column header here to group by that column

|   | 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 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
|   | Detroit        | 1A00-02A         |                   | kathy.dipaolo... | notes | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
|   | Cali           | 3A01-01B         |                   | kathy.dipaolo... | note  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |
|   | Arlington      | W1.A28.LvD....   |                   | donald.murra...  | Texas | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 01          | 0100      |

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

| Main Inventory Information - Fin  |             |                |                |
|---|-------------|----------------|----------------|
| Item Information  |             |                |                |
| Item #  | 54725       | Inventory Code | 20180321-POD-5 |
| Linked Customer   |             |                |                |
| Account #   | MYCUST      |                |                |
| <div><div>Main Information</div><div>Rules /Settings</div><div>Item Links</div><div>Extra Information</div><div>Printing Specifications</div><div>Current Quantities</div><div>Fulfillment Settings</div></div> |             |                |                |
| Links   |             |                |                |
| Vendor  |             |                |                |
| Default Location  | POD PHILLY  |                | POD Philly     |
| WareHouse   | Philly - 01 |                |                |

| Main Inventory Information - Fin  |               |                |                |
|---|---------------|----------------|----------------|
| Item Information  |               |                |                |
| Item #  | 54724         | Inventory Code | 20180321-POD-4 |
| Linked Customer   |               |                |                |
| Account #   | MYCUST        |                |                |
| <div><div>Main Information</div><div>Rules /Settings</div><div>Item Links</div><div>Extra Information</div><div>Printing Specifications</div><div>Current Quantities</div><div>Fulfillment Settings</div></div> |               |                |                |
| Links   |               |                |                |
| Vendor  |               |                |                |
| Default Location  | POD ARLINGTON |                | POD Arlington  |
| WareHouse   | Arlington     |                |                |

| Main Inventory Information - Fin  |             |                |                |
|---|-------------|----------------|----------------|
| Item Information  |             |                |                |
| Item #  | 54723       | Inventory Code | 20180321-POD-3 |
| Linked Customer   |             |                |                |
| Account #   | MYCUST      |                |                |
| <div><div>Main Information</div><div>Rules /Settings</div><div>Item Links</div><div>Extra Information</div><div>Printing Specifications</div><div>Current Quantities</div><div>Fulfillment Settings</div></div> |             |                |                |
| Links   |             |                |                |
| Vendor  |             |                |                |
| Default Location  | POD DETROIT |                | POD Detroit    |
| WareHouse   | Detroit     |                |                |

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.

| Warehouse Route Mappings                          |       |                 |             |             |            |            |                  |                          |  |
|---|-------|-----------------|-------------|-------------|------------|------------|------------------|--------------------------|--|
| Warehouse Route Mappings                          |       |                 |             |             |            |            |                  |                          |  |
| Reload/Reset Add New Mapping Delete Mapping Save  |       |                 |             |             |            |            |                  |                          |  |
| Warehouse Route Mappings                          |       |                 |             |             |            |            |                  |                          |  |
| Drag a column header here to group by that column |       |                 |             |             |            |            |                  |                          |  |
| Country   | State | Routing Profile | 1st Choice  | 2nd Choice  | 3rd Choice | 4th Choice | 5th Choice       | Delete                   |  |
| CAN   | BC    | Default Profile | Philly - 01 |             |            |            |                  | <input type="checkbox"/> |  |
| RUS   | NWT   | Default Profile | Cali        |             |            |            |                  | <input type="checkbox"/> |  |
| UZB   |       | Default Profile | Cali        |             |            |            |                  | <input type="checkbox"/> |  |
| USA   | TX    | Default Profile | Arlington   |             |            |            |                  | <input type="checkbox"/> |  |
| TWN   |       | Default Profile | Cali        |             |            |            |                  | <input type="checkbox"/> |  |
| ALB   | CC    | Default Profile | Philly - 01 |             |            |            |                  | <input type="checkbox"/> |  |
| USA   | CA    | Default Profile | Cali        |             |            |            |                  | <input type="checkbox"/> |  |
| DZA   |       | Default Profile | Detroit     |             |            |            |                  | <input type="checkbox"/> |  |
| AFG   |       | Default Profile | Iowa        |             |            |            |                  | <input type="checkbox"/> |  |
| USA   | NH    | Default Profile | Milton MA   |             |            |            |                  | <input type="checkbox"/> |  |
| USA   | VA    | Default Profile | Roanoke VA  | Cincinnati  | Detroit    | BigAndNice | Miami - Plant 33 | <input type="checkbox"/> |  |
| USA   | FL    | Default Profile | Miami - 01  |             |            |            |                  | <input type="checkbox"/> |  |
| USA   | OK    | Default Profile | Arlington   |             |            |            |                  | <input type="checkbox"/> |  |
| USA   | AZ    | Default Profile | Arlington   |             |            |            |                  | <input type="checkbox"/> |  |
| USA   | IA    | Default Profile | Iowa        | Philly - 01 |            |            |                  | <input type="checkbox"/> |  |



## 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.

The screenshot shows the 'Sales Order Header' form. The 'Warehouse' dropdown menu is highlighted with a red box and shows 'Iowa' selected. Other fields include Cust Batch ID: 123210, PO #: , Ship Profile: UPS Ground ..., Do Not Rel.: , Source Code: , Warehouse: Iowa, Input Batch ID: 123210, MIS Job#: , Ship Mode: U11, Ship Before Date: , SO Origin: , Commission Code: , Customer SO#: Test 4, Monthly SO#: , Ship Timeline: , Need Date: , Order Type: , Cost Center: , and Commission: .

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.

Sales Order Header

Cust Batch ID: 123210 PO #: Ship Profile: UPS Ground ... Do Not Rel.: Source Code: Warehouse: Iowa  
 Input Batch ID: 123210 MIS Job#: Ship Mode: U11 Ship Before Date: SO Origin: Commission Code:  
 Customer SO#: Test 4 Monthly SO#: Ship Timeline: Need Date: Order Type: Cost Center:  
 Commission:

| 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



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


|     |                          |             |            |        |                 |                 |     |                |                     |     |     |          |
|-----|--------------------------|-------------|------------|--------|-----------------|-----------------|-----|----------------|---------------------|-----|-----|----------|
| FFD | <input type="checkbox"/> | Detroit     | 1000809368 | Test 4 | My Fulfillme... | All Fields 2014 | ... | 20180321-POD-3 | POD Item 3          | 44  | 44  | 99999999 |
| FFD | <input type="checkbox"/> | Arlington   | 1000809368 | Test 4 | My Fulfillme... | All Fields 2014 | ... | 20180321-POD-4 | POD Item 4          | 99  | 99  | 99999999 |
| FFD | <input type="checkbox"/> | Philly - 01 | 1000809368 | Test 4 | My Fulfillme... | All Fields 2014 | ... | 20180321-POD-5 | POD Item 5          | 111 | 111 | 99999999 |
| C   | <input type="checkbox"/> | Iowa        | 1000809368 | Test 4 | My Fulfillme... | All Fields 2014 | ... | 20180321-CI-1  | FGCU                | 16  | 16  | 14417    |
| FG  | <input type="checkbox"/> | 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:



**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.

|   |               | <b>Order #:</b> 1000809368<br><b>Order Type:</b> Normal<br><b>Order Date/Time:</b> 7/31/2018 12:00:43PM<br><b>Release Date/Time:</b> 7/31/2018 12:40:04PM<br><b>Date/Time Printed:</b> 7/31/2018 12:40:42PM<br><b>Order Created By:</b> NORMA |       |           |           |             |          |             |           |            |          |             |      |               |      |      |         |    |      |      |      |
|--|---------------|---|-------|-----------|-----------|-------------|----------|-------------|-----------|------------|----------|-------------|------|---------------|------|------|---------|----|------|------|------|
| <b>Ship To:</b><br><b>My Fulfillment Customer</b><br>My Fulfillment Customer<br>104 Lincoln Blvd<br>Ames IA 50010<br>UNITED STATES   |               | <b>Ordered By:</b><br><b>My Fulfillment Customer</b><br>104 Lincoln Blvd<br>Ames IA 50010<br>UNITED STATES  |       |           |           |             |          |             |           |            |          |             |      |               |      |      |         |    |      |      |      |
| <b>Phone:</b><br><b>Fax:</b><br><b>Email:</b> norma.nelsen@efi.com<br><b>Comments:</b>   |               | <b>Cust Order #:</b> Test 4<br><b>Release Id #:</b> 91249<br><b>Pack Slip #:</b> 264895<br><b>Date Needed:</b><br><b>Ship Method:</b> UPS Ground (Sig)  |       |           |           |             |          |             |           |            |          |             |      |               |      |      |         |    |      |      |      |
| <table border="1"> <thead> <tr> <th>Warehouse</th> <th>Inv Code</th> <th>Description</th> <th>Job #</th> <th>Location</th> <th>Order Qty</th> <th>Unit Price</th> <th>Discount</th> <th>Total Price</th> </tr> </thead> <tbody> <tr> <td>Iowa</td> <td>20180321-CI-1</td> <td>FGCU</td> <td>4263</td> <td>1.1.1.1</td> <td>16</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table> |               |   |       | 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 |
| 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.

|   |                | <b>Order #:</b> 1000809368<br><b>Order Type:</b> Normal<br><b>Order Date/Time:</b> 7/31/2018 12:00:43PM<br><b>Release Date/Time:</b> 7/31/2018 12:40:04PM<br><b>Date/Time Printed:</b> 7/31/2018 12:40:42PM<br><b>Order Created By:</b> NORMA |       |               |           |             |          |             |           |            |          |             |           |                |            |      |               |    |      |      |        |
|--|----------------|---|-------|---------------|-----------|-------------|----------|-------------|-----------|------------|----------|-------------|-----------|----------------|------------|------|---------------|----|------|------|--------|
| <b>Ship To:</b><br><b>My Fulfillment Customer</b><br>My Fulfillment Customer<br>104 Lincoln Blvd<br>Ames IA 50010<br>UNITED STATES   |                | <b>Ordered By:</b><br><b>My Fulfillment Customer</b><br>104 Lincoln Blvd<br>Ames IA 50010<br>UNITED STATES  |       |               |           |             |          |             |           |            |          |             |           |                |            |      |               |    |      |      |        |
| <b>Phone:</b><br><b>Fax:</b><br><b>Email:</b> norma.nelsen@efi.com<br><b>Comments:</b>   |                | <b>Cust Order #:</b> Test 4<br><b>Release Id #:</b> 91249<br><b>Pack Slip #:</b> 264896<br><b>Date Needed:</b><br><b>Ship Method:</b> UPS Ground (Sig)  |       |               |           |             |          |             |           |            |          |             |           |                |            |      |               |    |      |      |        |
| <table border="1"> <thead> <tr> <th>Warehouse</th> <th>Inv Code</th> <th>Description</th> <th>Job #</th> <th>Location</th> <th>Order Qty</th> <th>Unit Price</th> <th>Discount</th> <th>Total Price</th> </tr> </thead> <tbody> <tr> <td>Arlington</td> <td>20180321-POD-4</td> <td>POD Item 4</td> <td>4263</td> <td>POD ARLINGTON</td> <td>99</td> <td>3.00</td> <td>0.00</td> <td>297.00</td> </tr> </tbody> </table> |                |   |       | 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 |
| 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.

|    |                | <b>Order #:</b> 1000809368<br><b>Order Type:</b> Normal<br><b>Order Date/Time:</b> 7/31/2018 12:00:43PM<br><b>Release Date/Time:</b> 7/31/2018 12:40:04PM<br><b>Date/Time Printed:</b> 7/31/2018 12:40:42PM<br><b>Order Created By:</b> NORMA |       |             |           |             |          |             |           |            |          |             |         |                |            |      |             |    |      |      |       |
|---|----------------|---|-------|-------------|-----------|-------------|----------|-------------|-----------|------------|----------|-------------|---------|----------------|------------|------|-------------|----|------|------|-------|
| <b>Ship To :</b><br><b>My Fulfillment Customer</b><br>My Fulfillment Customer<br>104 Lincoln Blvd<br>Ames IA 50010<br>UNITED STATES   |                | <b>Ordered By:</b><br><b>My Fulfillment Customer</b><br>104 Lincoln Blvd<br>Ames IA 50010<br>UNITED STATES  |       |             |           |             |          |             |           |            |          |             |         |                |            |      |             |    |      |      |       |
| <b>Phone :</b><br><b>Fax :</b><br><b>Email :</b> norma.nelsen@efi.com<br><b>Comments :</b>  |                | <b>Cust Order #:</b> Test 4<br><b>Release Id #:</b> 91249<br><b>Pack Slip #:</b> 264897<br><b>Date Needed :</b><br><b>Ship Method :</b> UPS Ground (Sig)  |       |             |           |             |          |             |           |            |          |             |         |                |            |      |             |    |      |      |       |
| <table border="1"> <thead> <tr> <th>Warehouse</th> <th>Inv Code</th> <th>Description</th> <th>Job #</th> <th>Location</th> <th>Order Qty</th> <th>Unit Price</th> <th>Discount</th> <th>Total Price</th> </tr> </thead> <tbody> <tr> <td>Detroit</td> <td>20180321-POD-3</td> <td>POD Item 3</td> <td>4263</td> <td>POD DETROIT</td> <td>44</td> <td>2.00</td> <td>0.00</td> <td>88.00</td> </tr> </tbody> </table> |                |   |       | 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 |
| 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 |
|--|------------|--------------------------------|-------|-------------------------|-------------------------|------------|------------------|---|
| <b>Customer :</b>                        |            | <b>My Fulfillment Customer</b> |       |                         |                         |            |                  |   |
| <b>Project :</b>                         |            | <b>All Fields 2014</b>         |       |                         |                         |            |                  |   |
| <b>Release ID :</b>                      |            | <b>91249</b>                   |       |                         |                         |            |                  |   |
| 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) |   |
| <b>Total # of Orders for Release : 4</b> |            |                                |       |                         |                         |            |                  |   |

## Processing the Sales Order

PODs would be received from the scheduled task screen.

| Sales Order #             |           |      |                |       |            |                 |        |                |               |             |             |         |         |                |        |           |         |
|---------------------------|-----------|------|----------------|-------|------------|-----------------|--------|----------------|---------------|-------------|-------------|---------|---------|----------------|--------|-----------|---------|
|                           | Date      | Time | Priority or PO | Job # | MIS Job ID | Customer/Vendor | Item # | Inventory Code | Revision Code | Description | Line Item # | Est Qty | Act Qty | Component Name | Status | Request # | BatchID |
| Sales Order #: 1000809364 |           |      |                |       |            |                 |        |                |               |             |             |         |         |                |        |           |         |
| Sales Order #: 1000809367 |           |      |                |       |            |                 |        |                |               |             |             |         |         |                |        |           |         |
| Sales Order #: 1000809368 |           |      |                |       |            |                 |        |                |               |             |             |         |         |                |        |           |         |
|                           | 7/31/2018 |      | 11735          |       | 380504_1   | SiglerCo        | 54725  | 20180321-POD-5 |               | POD Item 5  | 3           | 111     | 0       | 20180321-POD-5 | None   | 49583     | 0 P     |
|                           | 7/31/2018 |      | 11736          |       | 380504_2   | SiglerCo        | 54724  | 20180321-POD-4 |               | POD Item 4  | 4           | 99      | 0       | 20180321-POD-4 | None   | 49584     | 0 P     |
|                           | 7/31/2018 |      | 11737          |       | 380504_3   | SiglerCo        | 54723  | 20180321-POD-3 |               | POD Item 3  | 5           | 44      | 0       | 20180321-POD-3 | OK     | 49585     | 0 P     |
| Sales Order #: 1000809364 |           |      |                |       |            |                 |        |                |               |             |             |         |         |                |        |           |         |
| Sales Order #: 1000809367 |           |      |                |       |            |                 |        |                |               |             |             |         |         |                |        |           |         |
| Sales Order #: 1000809368 |           |      |                |       |            |                 |        |                |               |             |             |         |         |                |        |           |         |
|                           | 7/31/2018 |      | 11735          |       | 380504_1   | SiglerCo        | 54725  | 20180321-POD-5 |               | POD Item 5  | 3           | 111     | 0       | 20180321-POD-5 | None   | 49583     | 0 P     |
|                           | 7/31/2018 |      | 11736          |       | 380504_2   | SiglerCo        | 54724  | 20180321-POD-4 |               | POD Item 4  | 4           | 99      | 0       | 20180321-POD-4 | None   | 49584     | 0 P     |
|                           | 7/31/2018 |      | 11737          |       | 380504_3   | SiglerCo        | 54723  | 20180321-POD-3 |               | POD Item 3  | 5           | 44      | 0       | 20180321-POD-3 | OK     | 49585     | 0 P     |

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]

Save and Ship [Alt + 1]

**Pick Details**

Pick ID : 264894 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 By : Bulk Shipping

**Packages**

| Tracking No | Ship Date | Ship Mode        |
|-------------|-----------|------------------|
| > X         | 7/31/2018 | UPS Ground (Sig) |

**Package Detail**

Tracking # : X Philly

Ship Date : 7/31/2018

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 : 264895 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 Shi

**Packages**

| Tracking No | Ship Date | Ship Mode        |
|-------------|-----------|------------------|
| > X         | 7/31/2018 | UPS Ground (Sig) |

**Package Detail**

Tracking # : X Iowa

Ship Date : 7/31/2018

Ship Mode : UPS Ground (Sig)

Fulfillment Release   Fulfillment Shipping X

New Save Print Void [View Item] [Materials] [Ship] [One-Click Save/Ship]

---

**^ Pick Details**

Pick ID : 264896   Order ID: 1000809368   **Shipping Address**  
Release Batch : 91249   Customer SO Id: Test 4   My Customer  
Job # : 4263   104 Lincoln Blvd  
# Packages : 0   Ames IA 50010   Packed I  
Bulk Ship

---

**^ Packages**

| Tracking No | Ship Date | Ship Mode        |
|-------------|-----------|------------------|
| > X         | 7/31/2018 | UPS Ground (Sig) |

**^ Package Detail**

Tracking # : X Arlington  
Ship Date : 7/31/2018  
Ship Mode : UPS Ground (Sig)

Fulfillment Release   Fulfillment Shipping X

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   **Shipping Address**  
Release Batch : 91249   Customer SO Id: Test 4   My Customer  
Job # : 4263   104 Lincoln Blvd  
# Packages : 0   Ames IA 50010   Packed I  
Bulk Ship

---

**^ Packages**

| Tracking No | Ship Date | Ship Mode        |
|-------------|-----------|------------------|
| > X         | 7/31/2018 | UPS Ground (Sig) |

**^ Package Detail**

Tracking # : X Detroit  
Ship Date : 7/31/2018  
Ship Mode : UPS Ground (Sig)

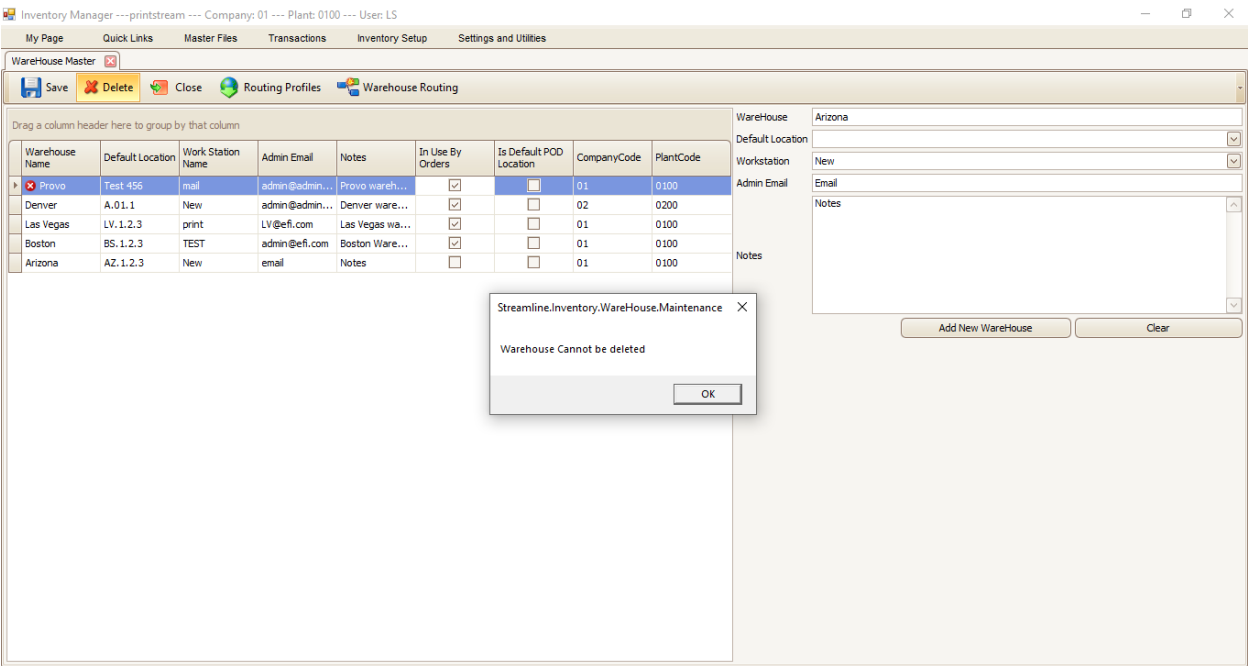
## Editing/Deleting a Warehouse

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.

Manage Multiple Locations

Location Range

From  To  Refresh

Drag a column header here to group by that column

| 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     | 1.1.1.1.OLD | Z    | New Warehouse        | 0      | 0     | 0     | 0              | 600              | 6000             | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 8             | Provo     | 1.1.1.2.T   | M    | Warehouse 1, Row...  | 0      | 0     | 0     | 0              | 18000            | 30000            | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 7             | Provo     | 1.1.1.3     | M    | warehouse 3 ...      | 0      | 0     | 0     | 0              | 0                | 0                | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 9             | Provo     | P.1.A       | EE   | Pick Pack area 1 ... | 0      | 0     | 0     | 0              | 0                | 0                | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 3             | Provo     | P.2.A       | EE   | PICK AREA ...        | 0      | 0     | 0     | 0              | 0                | 0                | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 4             | Provo     | P.3.A       | EE   | 6                    | 0      | 0     | 0     | 0              | 0                | 0                | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 6             | Provo     | P.4.A       | EE   | 7                    | 0      | 0     | 0     | 0              | 0                | 0                | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 10            | Provo     | P.1.B       | EE   | 8                    | 0      | 0     | 0     | 0              | 0                | 0                | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 2             | Provo     | P.2.B       | EE   | 9                    | 0      | 0     | 0     | 0              | 0                | 0                | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 11            | Provo     | P.3.B       | EE   | 10                   | 0      | 0     | 0     | 0              | 0                | 0                | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 12            | Provo     | 100*0*0     | M    | import               | 0      | 0     | 0     | 0              | 0                | 0                | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |
| 55            | Provo     | A00         | EE   | Imported Location    | 0      | 0     | 0     | 0              | 0                | 0                | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |           |

☐ Check/Uncheck Allow Negative Quantity
 ☐ Check/Uncheck Schedule task
 ☐ Check/Uncheck Charge For Storage
 ☐ Check/Uncheck Location Is At Carousel

817

☐ Check/Uncheck Location Is Active (Location will NOT be saved as NOT active if used by system as Default and/or have records with quantity allocated)

Note: Location Type 'S'-Staging; 'P'-Put Away; 'FR'-FF Return location

### 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).

View / Manage Single Location

New Save Delete

Details

Master File Location

Search Location

Details

Warehouse

Location

Description

Type  'S'-Staging; 'P'-Put Away; 'FR'-FF Return location ; Other Char can be used for filtering

Height

Width

Depth

Max Weight

Min Qty

Max Qty

Sort Sequence  Location Can be set as NOT Active only if NOT in use by transactional data and NOT in use by setup as Default (for Items, Plant Receiving or Warehouse use), Return etc

Pick Zone

☒ Location Is Active
 ☐ Allow Negative
 ☐ Schedule Task
 ☐ Charge For Storage
 ☐ Location Is At Carousel

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 Table Generator

New

Delete

View Sample List / Generate

Generate Locations

Name Of Range

Prefix

Row

Range Details

Descriptive Name of Range

Select the name for this range. Usually, you will use n

Descriptive Name of Range

Row

DisplayFormat

Location Code Separator

Location Code Prefix

Location Description Separator

No Of Characters (Including Prefix)

0

Location Listing

Delete Duplicate Loc...

Location list to be generated and its default values

The following list contains the different name and value combinations, called ranges, that the generator will use to build the location list.

| Location | Description |
|----------|-------------|
| 1        | Row 1       |
| 2        | Row 2       |
| 3        | Row 3       |

The following values are optional. They will be applied to each new location record created.

Height

0

Width

0

Depth

0

Max Weight

0

Min Qty

0

Max Qty

0

Type

☐ Schedule Task

☐ Allow Negative Quantity

☐ Charge For Storage

Warehouse

| WarehouseName | DefaultPrinter                | DefaultLocation |
|---------------|-------------------------------|-----------------|
| Philly        | Microsoft XPS Document Writer | 1.1.1.1         |
| Detroit       | Microsoft XPS Document Writer | 1A00-02A        |
| Call          | Microsoft XPS Document Writer | 3A01-01B        |
| Arlington     | Microsoft XPS Document Writer | W1.A26.LVD.545  |
| Hilton MA     | Microsoft XPS Document Writer | 4A01-03         |
| ZZZZZZZZZZZZ  |                               | FFRETURNO100    |
| Roanoke       | Microsoft XPS Document Writer | 5A00-01A        |

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

Item #

Inv. Code

Rev. Code

Description

Audit Trail

Drag a column header here to group by that column

|   | Date     | Type             | Reference     | Location | WareHouse | Quantity | Quantity On Hand | Cost   | Value On Hand | User | Time  | Notes       | Job # | Receipt Job I |
|---|----------|------------------|---------------|----------|-----------|----------|------------------|--------|---------------|------|-------|-------------|-------|---------------|
| ➤ | 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

| Item #  | 32551    | Inv. Code                  | dmmf32551 | Rev. Code |                | Description        | 040714 Warehouse test #3 | Item Campaigns |
|---|----------|----------------------------|-----------|-----------|----------------|--------------------|--------------------------|----------------|
| <b>Item Locations / Skids</b>   |          |                            |           |           |                |                    |                          |                |
| Inventory Location Location Commitments Skid Commitments All Location Skids |          |                            |           |           |                |                    |                          |                |
| Drag a column header here to group by that column                           |          |                            |           |           |                |                    |                          |                |
| WareHouse   | Location | Description                | Cartons   | Loose     | Total Quantity | Committed Quantity |                          |                |
| Philly  | 1.1.1.1  | Default Location           | 10        | 0         | 1,000          | 0                  |                          |                |
| Call  | 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

**Inventory Transfer**

Item #  Inv. Code  Rev. Code  Description

View by Locations View by Skids

| View by Locations                         | Warehouse |
|---|-----------|
| 1.1.1.1 - 1000 TOTAL PIECES               | Philly    |
| 15202 -> 1000 10 CTNS X 100 PCS + 0 LOOSE | Philly    |
| 2A01-01 - 1000 TOTAL PIECES               | Cali      |
| 15205 -> 1000 10 CTNS X 100 PCS + 0 LOOSE | Cali      |
| 4A01-01 - 1000 TOTAL PIECES               | Milton MA |
| 15203 -> 1000 10 CTNS X 100 PCS + 0 LOOSE | Milton MA |
| 4A03-01 - 1000 TOTAL PIECES               | Miami     |
| 15204 -> 1000 10 CTNS X 100 PCS + 0 LOOSE | Miami     |

Description

- 1.1.1.1 - 1000 TOTAL PIECES
  - 15202 -> 1000 10 CTNS X 100 PCS + 0 LOOSE
- 2A01-01 - 1000 TOTAL PIECES
  - 15205 -> 1000 10 CTNS X 100 PCS + 0 LOOSE
- 4A01-01 - 1000 TOTAL PIECES
  - 15203 -> 1000 10 CTNS X 100 PCS + 0 LOOSE
- 4A03-01 - 1000 TOTAL PIECES
  - 15204 -> 1000 10 CTNS X 100 PCS + 0 LOOSE

## Returns

**Over/Returns Detail**

Return Load Data Cancel Split/Merge and Return Print Option Clear All

**Usage Return**

Dates From  To  Job Detail Job #  Description

Inventory

Item #  Inv Code  Rev. Code  Description

Drag a column header here to group by that column

| Select                              | Item # | Inv Cd       | Skid Id | WareHous e | Location | Lot # | Vendor Lot # | Job # | Cartons | Loose | Quantity Issued | Quantity Returned | MISJobNu mber | Pk |
|-------------------------------------|--------|--------------|---------|------------|----------|-------|--------------|-------|---------|-------|-----------------|-------------------|---------------|----|
| <input checked="" type="checkbox"/> | 31838  | ALLFIELDS... | 15253   | Philly     | 1.1.1.1  | 0     |              | 4263  | 0       | 488   | -488            | 88                | P4411         |    |
| <input type="checkbox"/>            | 32560  | dmmff32560   | 15257   | 4A05-04    | 0        |       | 4325         | 1     | 0       | -100  | 30              | P4375             |               |    |
| <input type="checkbox"/>            | 32560  | dmmff32560   | 15256   | Milton MA  | 4A01-03  | 0     |              | 4325  | 1       | 10    | -110            | 0                 | P4375         |    |
| <input type="checkbox"/>            | 32509  | FG5099       | 15142   | Detroit    | 1A00-02A | 0     |              | 4325  | 0       | 10    | -10             | 0                 | 372407_0      |    |
| <input type="checkbox"/>            | 32509  | FG5099       | 15142   | Detroit    | 1A00-02A | 0     |              | 4325  | 0       | 5     | -5              | 0                 | 372407_0      |    |
| <input type="checkbox"/>            | 1027   | LCG15-10...  | 15097   | Philly     | 1.1.1.1  | 0     |              | 1022  | 0       | -12   | -12             | 0                 | 372400_0      |    |

## Physical Count Report

**Physical Counts Batch Mode**

Control #  Description

Start Date  Created by  Stage

Create Control Filter Data Assign Users (Optional) Enter Counts Run Report Update System

☐ Allow Entering Decimal User Id  Load

Drag a column header here to group by that column

| ID | Item # | Inv Code  | Rev Code | Location | Warehouse | Skid Id | Ctns | PPC | Loose | Total | Ctns | PPC | Loose | Total | Hold                     | Reason | Notes | Duplicate |
|----|--------|-----------|----------|----------|-----------|---------|------|-----|-------|-------|------|-----|-------|-------|--------------------------|--------|-------|-----------|
| 1  | 32551  | dmmf32... |          | 1.1.1.1  | Philly    | 15202   | 10   | 100 | 0     | 1,000 | 10   | 100 | 0     | 1,000 | <input type="checkbox"/> |        | a     | N         |
| 2  | 32551  | dmmf32... |          | 2A01-01  | Cali      | 15205   | 10   | 100 | 0     | 1,000 | 10   | 100 | 0     | 1,000 | <input type="checkbox"/> |        | a     | N         |
| 3  | 32551  | dmmf32... |          | 4A01-01  | Milton MA | 15203   | 10   | 100 | 0     | 1,000 | 10   | 100 | 0     | 1,000 | <input type="checkbox"/> |        | a     | N         |
| 4  | 32551  | dmmf32... |          | 4A03-01  | Miami     | 15204   | 10   | 100 | 0     | 1,000 | 10   | 100 | 0     | 1,000 | <input type="checkbox"/> |        | a     | N         |

## Single Item Adjustment

| Single Item Physical Counts                       |                          |        |            |       |           |          |             |                          |             |               |       |            |             |              |     |
|---|--------------------------|--------|------------|-------|-----------|----------|-------------|--------------------------|-------------|---------------|-------|------------|-------------|--------------|-----|
| Item #  | 32551                    |        |            |       |           |          |             |                          |             | Skids         | 1     |            | Carton      | 0            |     |
| Inv. Code   | dmmf32551                |        |            |       | Rev. Code |          |             |                          |             | Loose         | 0     |            | Total Value |              |     |
| Description                                       | 040714 Warehouse test #3 |        |            |       |           |          |             |                          |             |               |       |            |             |              |     |
| Drag a column header here to group by that column |                          |        |            |       |           |          |             |                          |             |               |       |            |             |              |     |
| vWarehouse  | Location                 | Carton | Pcs/Carton | Loose | Skid Id   | Quantity | Total Value | Hold                     | Reason Code | Received Date | LotNo | Commit Qty | Skid Notes  | Trans. Notes | IsC |
| > Philly  | 1.1.1.1                  | 10     | 100        | 0     | 15202     | 1,000    | 0           | <input type="checkbox"/> |             | 4/7/2014 1... | 0     | 0          |             |              |     |
| Milton MA   | 4A01-01                  | 10     | 100        | 0     | 15203     | 1,000    | 0           | <input type="checkbox"/> |             | 4/7/2014 1... | 0     | 304        |             |              |     |
| Miami   | 4A03-01                  | 10     | 100        | 0     | 15204     | 1,000    | 0           | <input type="checkbox"/> |             | 4/7/2014 1... | 0     | 10         |             |              |     |
| Call  | 2A01-01                  | 10     | 100        | 0     | 15205     | 1,000    | 0           | <input type="checkbox"/> |             | 4/7/2014 1... | 0     | 0          |             |              |     |

## Receipts

| Receipt Line Item Info   |  |  |  |  |                   |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|-------------------|--|--|--|--|--|--|--|--|--|
| <input type="button" value="Save Receipt Line"/> <input type="button" value="Remove Receipt Line"/> <input type="button" value="Cancel Edit"/> <input type="button" value="Close"/>  |  |  |  |  |                   |  |  |  |  |  |  |  |  |  |
| Job #  |  |  |  |  | Job Title         |  |  |  |  |  |  |  |  |  |
| <input checked="" type="radio"/> Identified <input type="radio"/> Unidentified   |  |  |  |  | Transaction Notes |  |  |  |  |  |  |  |  |  |
| Inventory Item Info <input type="button" value="Hat Info"/>  |  |  |  |  |                   |  |  |  |  |  |  |  |  |  |
| <div> <div>Item #</div> <div>32551</div> <div>New Item</div> </div> <div> <div>Inv. Code</div> <div>dmmf32551</div> <div>Rev. Code</div> </div> <div> <div>Description</div> <div>040714 Warehouse test #3</div> </div>  |  |  |  |  |                   |  |  |  |  |  |  |  |  |  |
| <div> <div>Location</div> <div>Loca...</div> <div>Description</div> <div>Height</div> <div>W...</div> </div> <div> <div>1.1.1.1</div> <div></div> <div>Default Location</div> <div></div> <div>Philly</div> </div> <div> <div>1.MWH</div> <div></div> <div>Test of Multi W...</div> <div></div> <div>Philly</div> </div> <div> <div>1A00-01A</div> <div></div> <div>Row 1A - Col 0...</div> <div></div> <div>Philly</div> </div> <div> <div>1A00-01B</div> <div></div> <div>Row 1A - Col 0...</div> <div></div> <div>Philly</div> </div> <div> <div>1A00-02A</div> <div></div> <div>Row 1A - Col 0...</div> <div></div> <div>De...</div> </div> <div> <div>1A00-02B</div> <div></div> <div>Row 1A - Col 0...</div> <div></div> <div>De...</div> </div> <div> <div>1A00-03A</div> <div></div> <div>Row 1A - Col 0...</div> <div></div> <div>T2</div> </div> |  |  |  |  |                   |  |  |  |  |  |  |  |  |  |
| <div> <div>Number Up</div> <div>1</div> </div> <div> <div>Docket #</div> <div>1</div> </div> <div> <div>Pcs / Carton</div> <div>0</div> </div> <div> <div>Loose</div> <div>100</div> </div>  |  |  |  |  |                   |  |  |  |  |  |  |  |  |  |
| <div> <div>LoosePieces</div> <div>Full Pallet</div> <div>Hold Reason</div> <div>Skid On ...</div> <div>Sk</div> </div>   |  |  |  |  |                   |  |  |  |  |  |  |  |  |  |
| <div> <div>1.1.1.1</div> <div>0</div> <div>0</div> <div>100</div> <div>No</div> <div></div> <div>No</div> </div>   |  |  |  |  |                   |  |  |  |  |  |  |  |  |  |

## 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:

Carolina Bottling Company : Sales Order #: 1000242679\*\*\*Project : All Product

Customer Carolina Bottling Comp... Project All Product

Sales Order

Manage

Order Header

Variable Info

Notes

Sales Order

Items

Get Items

Zoom

Item Properties

Inquiry

Reprint WO

Items

Finance

Credit Card

Billing

Credit

Transactions

Billing Detail

Add Discount

Sel. Discount

Dis

Sales Order Header

Cust Batch ID:

PO #:

Ship Profile: UPS NEXT DA...

Input Batch ID: 49180

MIS Job#:

Ship Mode: U01

Customer SO#:

Monthly SO#:

Ship Timeline:

Order By Ship To Bill to

Address: 2222 Carolina Bottle Road

Postal Code: 28110

County:

City: MONROE

State: NC

Country: United States

Carolina Bottling Company : Sales Order #: 1000242682\*\*\*Project : All Product

Customer: Carolina Bottling Comp... Project: All Product

Sales Order Manage

Order Header Notes Sales Order Items Get Items Zoom Inquiry Reprint WO Finance Credit Card Billing Detail Billing Add Discount: Sel. Discount: Shipping Estimated Shipping

Sales Order Header

Cust Batch ID: PO #: Ship Profile: UPS NEXT DA... Do Not Rel.: 3/25/2016 Source Code: Warehouse: NCProdu...  
 Input Batch ID: 49183 MIS Job#: Ship Mode: U01 Ship Before Date: 3/25/2016 SO Origin: Commission Code:  
 Customer SO#: Monthly SO#: Ship Timeline: Need Date: 3/25/2016 Order Type: Cost Center: Commission:

| Alt | Inv Code | Rev Code | Item Desc | Need Date | Order Qty | Return Qty | Unit Price | Status      | Serial # | MISJob# | Ship To | Warehouse  | Prof |
|-----|----------|----------|-----------|-----------|-----------|------------|------------|-------------|----------|---------|---------|------------|------|
| >   |          |          |           | 3/25/2016 | 0         | 0          |            | UnProcessed |          |         |         | NCProdu... |      |

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

3/25/2016 Source Code: Warehouse: NCProdu... Product Type:

3/25/2016 SO Origin: Commission Code:

3/25/2016 Order Type: Cost Center: Commission:

WarehouseName  
 NCProduction  
 GGP  
 Warehouse1  
 Warehouse2  
 Milton  
 Pittsburgh  
 Richmond - Plant 0100

| Unit Price | Status      | Serial # | MISJob# | Ship To | Warehouse  | Profile Id | Ship Mode | P |
|------------|-------------|----------|---------|---------|------------|------------|-----------|---|
|            | UnProcessed |          |         |         | NCProdu... |            |           |   |

| .SJob# | Ship To | Warehouse | Profile Id  | Ship Mode | PC |
|--------|---------|-----------|-------------|-----------|----|
|        | CaBot   | NCProd... | UPS GROU... | U11       |    |

Name  
 NCProduction  
 GGP  
 Warehouse1  
 Warehouse2  
 Milton  
 Pittsburgh  
 Richmond - Plant 0100

## 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.

**Fulfillment Release**

Field List | Release | Hold | Un-Hold | Cancel | Put on Back Order | Change Ship Profiles | Change Warehouse | View Capacity | Refresh | Update MIS Job | Update Monthly Order | Group Orders | UnGroup Orders

Transaction Type: Release Orders/Maintain Orders

☒ View Pick Slips and Pull Report before Printing?

Primary Filters: Additional Filters | Order Lines Found | Orders Found | Inventory Required Found | Grid Report | Pick Cancellation

☐ Select All Show: All Items Back Order Release: Back-Order Hold

Drag a column header here to group by that column

| Selected                 | ItemType | Sales Order ID | Customer Name       | Item Number | Inventory Code | Item Description | Warehouse | Gross Quantity | Order Quantity | On Hand Quantity | Release Committed | Committed Quantity | Available Quantity | Master ID | Item Not |
|--------------------------|----------|----------------|---------------------|-------------|----------------|------------------|-----------|----------------|----------------|------------------|-------------------|--------------------|--------------------|-----------|----------|
| <input type="checkbox"/> | Item     | 1000032425     | DMM FF Test Company | 32551       | dmnf32551      | 040714 Wa...     | Milton MA | 220            | 220            | 4000             | 30                | 250                | 980                | 0         |          |
| <input type="checkbox"/> | Item     | 1000032382     | DMM FF Test Company | 32550       | dmnf32550      | 040714 Wa...     | Milton MA | 1030           | 1030           | 4000             | 30                | 5030               | 9970               | 0         |          |
| <input type="checkbox"/> | Item     | 1000032382     | DMM FF Test Company | 32550       | dmnf32550      | 040714 Wa...     | Milton MA | 3970           | 3970           | 4000             | 30                | 5030               | 980                | 0         |          |
| <input type="checkbox"/> | Item     | 1000032376     | DMM FF Test Company | 32503       | dmnf32503      | 040214 DM...     | Milton MA | 9050           | 9050           | 121000           | 50                | 121000             | 120950             | 0         |          |
| <input type="checkbox"/> | Item     | 1000032376     | DMM FF Test Company | 32503       | dmnf32503      | 040214 DM...     | Milton MA | 120950         | 120950         | 121000           | 50                | 121000             | 60950              | 0         |          |
| <input type="checkbox"/> | Item     | 1000032366     | DMM FF Test Company | 32546       | dmnf32546      | 040414 WH...     | Philly    | 25             | 25             | 1609             | 78                | 483                | 0                  | 0         |          |

Item # 32551 Inv. Code dmnf32551 Rev. Code Description 040714 Warehouse test #3 Item Campaigns

**Item Locations / Skids**

Inventory Location | Location Commitments | Skid Commitments | All Location Skids

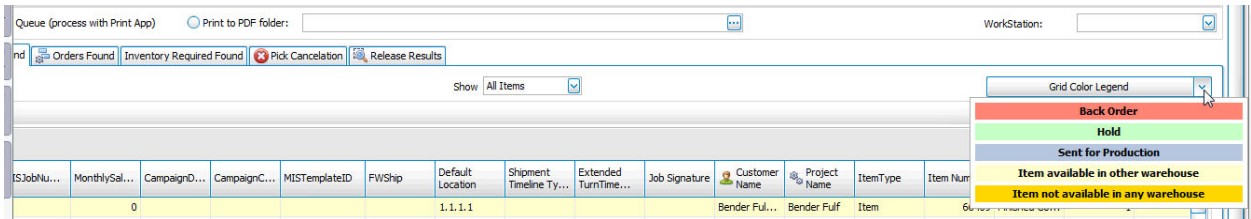
Drag a column header here to group by that column

| Location | Warehouse | Skid Id | Lot Number | Lot Price | Date     | Time  | Cartons | Pcs/Carton | Loose | Total Quantity | Committed Quantity | MIS Job Number | Status | Reason Code | Status Date |
|----------|-----------|---------|------------|-----------|----------|-------|---------|------------|-------|----------------|--------------------|----------------|--------|-------------|-------------|
| 1.1.1.1  | Philly    | 15202   | 0          | \$0.00    | 4/7/2014 | 14:42 | 10      | 100        | 0     | 1,000          | 0                  | P4375          |        |             | 4/7/2014    |
| 2A01-01  | Cal       | 15205   | 0          | \$0.00    | 4/7/2014 | 14:42 | 10      | 100        | 0     | 1,000          | 0                  | P4375          |        |             | 4/7/2014    |
| 4A01-01  | Milton MA | 15203   | 0          | \$0.00    | 4/7/2014 | 14:42 | 10      | 100        | 0     | 1,000          | 20                 | P4375          |        |             | 4/7/2014    |
| 4A03-01  | Miami     | 15204   | 0          | \$0.00    | 4/7/2014 | 14:42 | 10      | 100        | 0     | 1,000          | 10                 | P4375          |        |             | 4/7/2014    |



## 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.



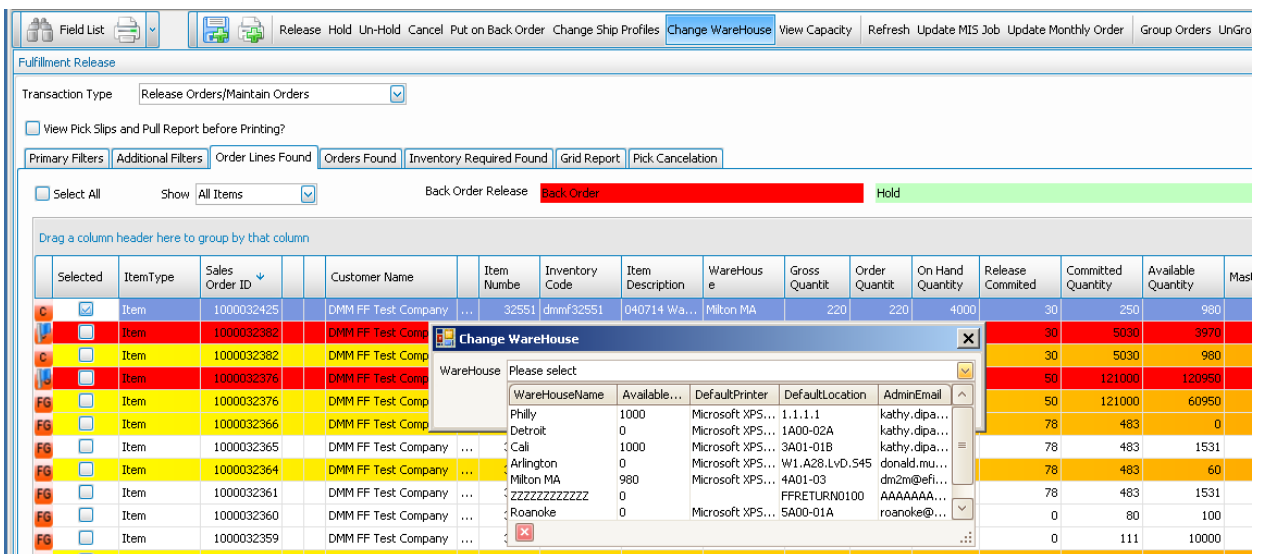
- Red - represents this order line is in backorder.
- Green - represents this order line is on hold.
- Blue - represents this order line has been sent for production using the Requires Product programming.
- Pale Yellow - represents the item is available in a different warehouse. Users can select these 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 for 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.

Fulfillment Release

Transaction Type Release Orders/Maintain Orders

☐ View Pick Slips and Pull Report before Printing?

Primary Filters Additional Filters Order Lines Found Orders Found Inventory Required Found Grid Report Pick Cancellation

☐ Select All Show All Items Back Order Release Back Order Hold

Drag a column header here to group by that column

|    | Selected                 | ItemType | Sales Order ID | Customer Name       | Item Number | Inventory Code | Item Description | Warehouse    | Gross Quantity | Order Quantity | On Hand Quantity | Release Committed | Committed Quantity | Available Quantity | Master ID | Item Not |
|----|--------------------------|----------|----------------|---------------------|-------------|----------------|------------------|--------------|----------------|----------------|------------------|-------------------|--------------------|--------------------|-----------|----------|
| C  | <input type="checkbox"/> | Item     | 1000032425     | DMM FF Test Company | ...         | 32551          | dmmf32551        | 040714 Wa... | Detroit        | 220            | 220              | 4000              | 30                 | 250                | 0         | 0        |
| V  | <input type="checkbox"/> | Item     | 1000032382     | DMM FF Test Company | ...         | 32550          | dmmf32550        | 040714 Wa... | Detroit        | 1030           | 1030             | 4000              | 30                 | 5030               | 3970      | 0        |
| C  | <input type="checkbox"/> | Item     | 1000032382     | DMM FF Test Company | ...         | 32550          | dmmf32550        | 040714 Wa... | Detroit        | 3970           | 3970             | 4000              | 30                 | 5030               | 980       | 0        |
| S  | <input type="checkbox"/> | Item     | 1000032376     | DMM FF Test Company | ...         | 32503          | dmmf32503        | 040714 Wa... | Detroit        | 9050           | 9050             | 121000            | 50                 | 121000             | 120950    | 0        |
| FG | <input type="checkbox"/> | Item     | 1000032376     | DMM FF Test Company | ...         | 32503          | dmmf32503        | 040714 Wa... | Detroit        | 120950         | 120950           | 121000            | 50                 | 121000             | 60950     | 0        |
| FG | <input type="checkbox"/> | Item     | 1000032366     | DMM FF Test Company | ...         | 32546          | dmmf32546        | 040714 Wa... | Detroit        | 25             | 25               | 1609              | 78                 | 483                | 0         | 0        |

PrintStream.Fulfillment

Warehouse Changed on these orders.

OK

## 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. 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.

Project Master - (DMM FF Project)

Default

My Page Project Master

Project Maintenance

Output

☒ Pick Slip

☒ Summary Pull Report

☐ Label

☐ Shipping Output

☐ Order Output

☐ Shipping Export

☐ Quality Checklist Req.

☐ Perform Ship Batch

☐ Auto Create Package at Release

☐ Print Combo WT by Package

FFPickSlipSkids\_Warehouse

# of Copies 1

PackageLabels

# of Copies 1

Mode

☒ Batch ☐ Single

Default Plant 0100

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

Fulfillment Release

Transaction Type Release Orders/Maintain Orders

☒ View Pick Slips and Pull Report before Printing?

Primary Filters Additional Filters Order Lines Found Orders Found Inventory Required Found Grid Report Pick Cancellation


☐ Select All Show All Items

Back Order Release Back Order Hold


Drag a column header here to group by that column

| Select                              | Item Type | Sales Order ID | Customer Name | Item Number | Inventory Code | Item Description         | Warehouse | Gross Quantity | Order Quantity | On Hand Quantity | Release Committed | Committed Quantity | Available Quantity |
|-------------------------------------|-----------|----------------|---------------|-------------|----------------|--------------------------|-----------|----------------|----------------|------------------|-------------------|--------------------|--------------------|
| <input checked="" type="checkbox"/> | Item      | 1000032426     | DMM FF Te...  | 32552       | dmmff32552     | 040714 Warehouse test #4 | Cali      | 63             | 63             | 4000             | 10                | 214                | 1000               |
| <input checked="" type="checkbox"/> | Item      | 1000032426     | DMM FF Te...  | 32551       | dmmff32551     | 040714 Warehouse test #3 | Milton MA | 64             | 64             | 4000             | 30                | 314                | 980                |
| <input checked="" type="checkbox"/> | Item      | 1000032425     | DMM FF Te...  | 32551       | dmmff32551     | 040714 Warehouse test #3 | Milton MA | 220            | 220            | 4000             | 30                | 314                | 980                |
| <input type="checkbox"/>            | 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 . . .

|   |  |  |  |
|---|--|--|--|
|    |  | <b>Order #:</b> 1000032425<br><b>Order Type:</b> Normal<br><b>Order Date/Time:</b> 4/15/2014 1:07:29PM<br><b>Release Date/Time:</b> 4/15/2014 2:00:52PM<br><b>Date/Time Printed:</b> 4/15/2014 2:01:06PM<br><b>Order Created By:</b> DMM |  |
|   |  |  |  |
| <b>Ship To :</b><br><b>DMM FF Test Company</b><br>DMM FF Test Company<br>510 Geen Hill Avenue<br>Milton MA 02186<br>UNITED STATES<br><br><b>Phone :</b> 617-617-1111<br><b>Fax :</b> 617-617-2222<br><b>Email :</b> don.murray2@efi.com<br>Comments : |  | <b>Cust Order #:</b><br><b>Release Id #:</b> 2718<br><b>Pack Slip #:</b> 13746<br><b>Date Needed :</b> 4/15/2014<br><b>Ship Method :</b> UPS Ground  |  |
|   |  | <b>Ordered By:</b><br><b>DMM FF Test Company</b><br>510 Geen Hill Avenue<br>Milton MA 02186<br>UNITED STATES<br><br><b>Phone :</b> 617-617-1111<br><b>Fax :</b> 617-617-2222<br><b>Email :</b> 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       |

|   |  |  |  |
|---|--|--|--|
|    |  | <b>Order #:</b> 1000032426<br><b>Order Type:</b> Normal<br><b>Order Date/Time:</b> 4/15/2014 1:53:54PM<br><b>Release Date/Time:</b> 4/15/2014 2:00:53PM<br><b>Date/Time Printed:</b> 4/15/2014 2:01:06PM<br><b>Order Created By:</b> DMM |  |
|   |  |  |  |
| <b>Ship To :</b><br><b>DMM FF Test Company</b><br>DMM FF Test Company<br>510 Geen Hill Avenue<br>Milton MA 02186<br>UNITED STATES<br><br><b>Phone :</b> 617-617-1111<br><b>Fax :</b> 617-617-2222<br><b>Email :</b> don.murray2@efi.com<br>Comments : |  | <b>Cust Order #:</b><br><b>Release Id #:</b> 2718<br><b>Pack Slip #:</b> 13747<br><b>Date Needed :</b> 4/15/2014<br><b>Ship Method :</b> UPS Ground  |  |
|   |  | <b>Ordered By:</b><br><b>DMM FF Test Company</b><br>510 Geen Hill Avenue<br>Milton MA 02186<br>UNITED STATES<br><br><b>Phone :</b> 617-617-1111<br><b>Fax :</b> 617-617-2222<br><b>Email :</b> 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        |

|    |            | <b>Order #:</b> 1000032426<br><b>Order Type:</b> Normal<br><b>Order Date/Time:</b> 4/15/2014 1:53:54PM<br><b>Release Date/Time:</b> 4/15/2014 2:00:53PM<br><b>Date/Time Printed:</b> 4/15/2014 2:01:06PM<br><b>Order Created By:</b> DMM |       |           |          |             |       |           |          |         |       |           |       |            |                          |      |  |  |  |  |    |  |  |           |  |       |         |   |    |    |
|---|------------|--|-------|-----------|----------|-------------|-------|-----------|----------|---------|-------|-----------|-------|------------|--------------------------|------|--|--|--|--|----|--|--|-----------|--|-------|---------|---|----|----|
|   |            |  |       |           |          |             |       |           |          |         |       |           |       |            |                          |      |  |  |  |  |    |  |  |           |  |       |         |   |    |    |
| <b>Ship To:</b><br><b>DMM FF Test Company</b><br>DMM FF Test Company<br>510 Geen Hill Avenue<br>Milton MA 02186<br>UNITED STATES<br><br><b>Phone:</b> 617-617-1111<br><b>Fax:</b> 617-617-2222<br><b>Email:</b> don.murray2@efi.com<br>Comments :   |            | <b>Cust Order #:</b><br><b>Release Id #:</b> 2718<br><b>Pack Slip #:</b> 13748<br><b>Date Needed:</b> 4/15/2014<br><b>Ship Method:</b> UPS Ground  |       |           |          |             |       |           |          |         |       |           |       |            |                          |      |  |  |  |  |    |  |  |           |  |       |         |   |    |    |
|   |            | <b>Ordered By:</b><br><b>DMM FF Test Company</b><br>510 Geen Hill Avenue<br>Milton MA 02186<br>UNITED STATES<br><br><b>Phone:</b> 617-617-1111<br><b>Fax:</b> 617-617-2222<br><b>Email:</b> don.murray2@efi.com                          |       |           |          |             |       |           |          |         |       |           |       |            |                          |      |  |  |  |  |    |  |  |           |  |       |         |   |    |    |
| <table border="1"> <thead> <tr> <th>Product #</th> <th>Inv Code</th> <th>Description</th> <th>Job #</th> <th>Skid #</th> <th>Location</th> <th>Cartons</th> <th>Loose</th> <th>Order Qty</th> </tr> </thead> <tbody> <tr> <td>32551</td> <td>dmmff32551</td> <td>040714 Warehouse test #3</td> <td>4325</td> <td></td> <td></td> <td></td> <td></td> <td>64</td> </tr> <tr> <td></td> <td></td> <td>Milton MA</td> <td></td> <td>15203</td> <td>4A01-01</td> <td>0</td> <td>64</td> <td>64</td> </tr> </tbody> </table> |            |  |       | Product # | Inv Code | Description | Job # | Skid #    | Location | Cartons | Loose | Order Qty | 32551 | dmmff32551 | 040714 Warehouse test #3 | 4325 |  |  |  |  | 64 |  |  | Milton MA |  | 15203 | 4A01-01 | 0 | 64 | 64 |
| Product #   | Inv Code   | Description  | Job # | Skid #    | Location | Cartons     | Loose | Order Qty |          |         |       |           |       |            |                          |      |  |  |  |  |    |  |  |           |  |       |         |   |    |    |
| 32551   | dmmff32551 | 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.

| Fulfillment Release   |           |                |               |          |                |                          |            |                |                |                  |                   |                    |                    |     |
|---|-----------|----------------|---------------|----------|----------------|--------------------------|------------|----------------|----------------|------------------|-------------------|--------------------|--------------------|-----|
| Transaction Type: Release Orders/Maintain Orders  |           |                |               |          |                |                          |            |                |                |                  |                   |                    |                    |     |
| <input checked="" type="checkbox"/> View Pick Slips and Pull Report before Printing?  |           |                |               |          |                |                          |            |                |                |                  |                   |                    |                    |     |
| Primary Filters: Additional Filters: Order Lines Found: Orders Found: Inventory Required Found: Grid Report: Pick Cancellation  |           |                |               |          |                |                          |            |                |                |                  |                   |                    |                    |     |
| <input type="checkbox"/> Select All    Show: All Items    Back Order Release: <span style="background-color: red; color: white;">Back Order</span> <span style="background-color: green; color: white;">Hold</span> |           |                |               |          |                |                          |            |                |                |                  |                   |                    |                    |     |
| Drag a column header here to group by that column   |           |                |               |          |                |                          |            |                |                |                  |                   |                    |                    |     |
| Select  | Item Type | Sales Order ID | Customer Name | Item Num | Inventory Code | Item Description         | WareHous e | Gross Quantity | Order Quantity | On Hand Quantity | Release Committed | Committed Quantity | Available Quantity | Mas |
| <input type="checkbox"/>  | Item      | 1000032417     | DMM FF Te...  | 32552    | dmmff32552     | 040714 Warehouse test #4 | Philly     | 21             | 21             | 4000             | 73                | 214                | 990                |     |
| <input type="checkbox"/>  | Item      | 1000032416     | DMM FF Te...  | 32552    | dmmff32552     | 040714 Warehouse test #4 | Milton MA  | 100            | 100            | 4000             | 73                | 214                | 1000               |     |
| <input checked="" type="checkbox"/>   | Item      | 1000032382     | DMM FF Te...  | 32550    | dmmff32550     | 040714 Warehouse Test #2 |            | 1030           | 1030           | 4000             | 30                | 5030               | 3970               |     |
| <input checked="" type="checkbox"/>   | Item      | 1000032382     | DMM FF Te...  | 32550    | dmmff32550     | 040714 Warehouse Test #2 | Milton MA  | 3970           | 3970           | 4000             | 30                | 5030               | 980                |     |
| <input type="checkbox"/>  | Item      | 1000032378     | DMM FF Te...  | 32552    | dmmff32552     | 040714 Warehouse test #4 | Philly     | 20             | 20             | 4000             | 73                | 214                | 990                |     |

**Streamline Fulfillment**  
 Could not release orders for project: due to a problem with inventory. Possibly inventory has been destroyed, or Kit or Package components do not have sufficient quantities to fill the order. Please check Inventory Master Files or replace the items that have been deleted.: [SSFulfillmentRelease.CheckAvailability] Problem Item#:32550  

OK