

Cartonization

Feature Documentation

Important Notices

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

Trademark Acknowledgements

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

Contents

Cartonization overview	5
Activation and setup.....	5
Labels	6
Reports	7
Birst and Data Lake	7
Advance ship notices.....	7
Integrated applications.....	8
Implementing cartonization	9
Activating cartonization.....	11
Setting up a package type for cartonization.....	12
Setting up a package group type for cartonization	12
Setting up a package for cartonization	13
Assigning a dimensional weight divisor to a carrier	14
Setting up a warehouse for cartonization	15
Setting up a customer for cartonization.....	17
Setting up an inventory or catalog product for cartonization	19
Setting up a product unit conversion record for cartonization	20
Using cartonization.....	22
Manually assigning products to cartons	22
Manually assigning a nonstock to a carton.....	23
Changing automatically assigned cartons	23
Deleting cartons on a sales order or warehouse transfer.....	24
Automatically assigning cartons in the Cartonization Center	25
Manually combining sales orders or transfers for shipment	25
Shipping cartons.....	26
Unshipping or staging cartons	27
Printing labels in the Cartonization Center.....	27
Reference topics.....	28
Customer Setup - Cartonization overview.....	28
Product Cartonization Center Entry overview.....	28
Product Cartonization Center Entry - Packages overview	29
Product Cartonization Center Entry - Package Detail overview	29
Product Cartonization Center Entry - Print Labels overview	30

Product Cartonization Package Setup overview.....	30
Product Cartonization Package Setup field descriptions.....	30
Details	30
Dimensions.....	31
Transportation	32
Product Setup - Cartonization overview.....	32
Product Setup - Cartonization field descriptions.....	33
Product Warehouse Description Setup - Cartonization overview.....	33
Product Warehouse Description Setup - Cartonization field descriptions.....	34
Cartonization.....	34
Format Carton ID.....	35
Positions of ID information	36
SA Table Code Value Setup - Package Group Type overview	36
SA Table Code Value Setup - Package Type overview	37
SA Table Code Value Setup - Package Type field descriptions	37
General.....	37
Extended	37
SA Table Code Value Setup - Transportation Standard Carrier overview	38
SA Table Code Value Setup - Transportation Standard Carrier field descriptions.....	38
General.....	38
Extended	38

Cartonization overview

To increase productivity and prevent waste, you can set up the cartonization feature to automatically determine which packages to use for product shipments.

Cartonization accommodates multiple cartons per line item and multiple products per carton. Carton information is tracked at the header and line level. It can be included on pick tickets and invoices, and in AdvanceShipNotice and Shipment BODs.

Cartonization is enabled per warehouse in **Product Warehouse Description Setup**. You can opt to automatically or manually assign cartons for sales orders, warehouse transfers, or both. You can limit the automatic assignment of cartons for warehouse transfers to direct orders. The cartonization setting for a warehouse can be overridden per customer in **Customer Setup** or per product in **Product Setup** or **Product Catalog Setup**.

Automatic cartonization is applied when you print tick tickets through the **Sales Entry Pick Tickets Report** and **Transfer Entry Print WT Report**, or when you print on demand. After you pick the order, use **Product Cartonization Center Entry (Cartonization Center)** to process the cartons for shipment.

In the **Cartonization Center**, you can review the cartons that were automatically created for an order and the contents of each carton. A shipping ID is assigned to the order, and a carton ID is assigned to each carton for the order. When you ship the cartons, you can specify the billable weight, freight amount, package number, and tracking ID. You can also indicate if shipping is free.

You can also perform these actions in the **Cartonization Center**:

- Assign cartons for warehouses, customers, or products that require manual assignment of cartons
- Delete cartons that were automatically assigned
- Move products from one carton to another
- Combine multiple orders that are being shipped to the same location
- Unship and stage cartons

After you ship packages in the **Cartonization Center**, you must then ship the related order or transfer in **Sales Shipping Feedback Entry** or **Transfer Shipping Entry**. You can use the quick ship feature. By design, you must add the freight amount from the **Cartonization Center** to the order or transfer before you ship it.

Activation and setup

To activate cartonization, select the **Use Cartonization** option in **SA Administrator Options-System-General**. Activation causes the cartonization fields, tabs, and sections to be available in related functions throughout Distribution SX.e. **Product Cartonization Center Entry** and **Product Cartonization Package Setup** are available even if cartonization is not activated. Access to the functions is controlled by operator security.

By default, cartonization for warehouses is not enabled and cartonization for customers defers to the

warehouse settings. If you do not perform the required setups, then activating cartonization does not affect Distribution SX.e.

Packages are set up per warehouse in **Product Cartonization Package Setup**. Package records include information such as dimensional measurements, cube and weight capacity, and tare weight. You can indicate if the package is for non-dimensional products such as liquids. You can also assign a package type and package group to the package. Package types identify standard and non-standard packages. Standard packages are used to ship most inventory and catalog products, whereas non-standard packages are used to meet special packaging requirements. Similar non-standard packages can be assigned to a package type group. Package types and package type groups are set up in **SA Table Code Value Setup**.

Products are set up for cartonization in **Product Setup** and **Product Catalog Setup**. Dimensional measurements, weight, and cube value on the **General** tab are used for package selection. Additional package-related settings are also available on the **Cartonization** tab. You can specify packing instructions and restrictions. You can also indicate if the product is a special dimensional product that requires manually packing or if the product can be shipped without additional packaging. When the product requires a non-standard package, you must specify the package type. You are not required to specify a package type if the product can be shipped in a standard package.

These types of products can also be included in cartonization:

- Products with a converted unit
Additional setup is required in **Product Extended Unit Conversion Setup**. Automatic assignment of cartons is based on the unit that is specified on the sales order or warehouse transfer.
- Nonstock products without a product catalog record
Nonstocks must be manually assigned to a carton.

Labels

You can print carton labels using Infor Document Management or Enterprise Printing Platform, a third-party labeling software. Default label templates are provided. You can create custom label templates and then specify which template to use for each label on **SA Printer Setup** records.

See the *Infor CloudSuite Distribution Configuration Guide* or the *Infor Distribution SX.e Integration Guide for Enterprise Printing Platform*.

You can print labels from the **Cartonization Center**. You can print all labels, per type, that are required for an order. You can also print a single label for most types of labels. The label templates on printer records are always used to determine the format of the label.

This table shows the types of labels that are available:

Label Type	Description
Carton	Carton ID label for each carton for an order
Product	Product label for each product/quantity in each carton for an order
Shipping	Address information label for the order
Package	Carton detail label for each carton for an order

You can also print package labels from the **Sales Entry Pick Tickets Report**, **Transfer Entry Print WT Report**, or the Integrated Barcode (IBC) **OE RF Shp Feedback** function on an RF unit. The package label template for cartonization is used if these criteria are met:

- Cartonization is activated in **SA Administrator Options**.
- A customer is on the sales order or warehouse transfer direct order.
- The customer uses cartonization for sales orders, or the customer uses warehouse default settings.
- If the customer uses warehouse default settings, then the warehouse must use cartonization for sales orders.

If the criteria are not met, then the labels are printed in the Integrate Barcode format that is specified on the printer record.

Reports

The cartonization information is included in these reports:

- Customer Master Report
- Data Conversion Reports
- Product Warehouse Master Report
- SA Data Archive Orders Report
- SA Data Archive Transfers Report
- SA Label Configuration Review Report
- Sales Consolidated Invoice Report
- Sales Entry Invoice Processing Report
- Sales Entry Pick Ticket Report
- Sales Entry Print Manifest Report
- Sales Order Master List Report
- Transfer Entry Print WT Report
- Transfer Master List Report

Birst and Data Lake

These cartonization tables are available in Birst and Data Lake:

- ICSCN: **Product Cartonization Package** Setup records
- ICECNHDR: **Cartonization Center** header records
- ICECNDTL: **Cartonization Center** detail records

Advance ship notices

Cartonization information is included in AdvanceShipNotice BODs, based on the **Print Carton Information on Advanced Shipping Notice (ASN)** option on **Product Warehouse Description Setup** records.

Customers can receive ASNs through AdvanceShipNotice BODs when you run the **Sales Entry Advance Shipping Notice (856) Report**.

Note: If the carton ID is included in the BOD, then the freight and weight values in the AdvanceShipNoticeUnit

section of the BOD are for the individual carton, not the containers.

For setup information, see the *Infor CloudSuite Distribution Setup and Administration Guide for EDI*.

Integrated applications

Cartonization is supported in integrations with these types of applications:

- Third-party shipping applications that use the Distribution SX.e shipping interface
Cartons can be automatically shipped and unshipped if the sales order is shipped or unshipped in a third-party shipping application. You can also ship warehouse transfers, but you cannot unship them.
If you use a third-party shipping application to determine values such as freight charges and carton weights, then a package record with a package number is created in Distribution SX.e. The package record is used to update the order, but it does not update the carton record. You can manually update the carton information in the **Cartonization Center**, if required.
- Applications that use sxapiOEOrderShipUnship call to ship orders
Shipment of cartons must be validated before the order can be shipped.
- Applications that can process the Sync.Shipment BOD
The application that receives the BOD must be able to process the carton information.

Implementing cartonization

Follow this checklist to perform the tasks to implement cartonization:

✓ Task	Reference topic/document
<input type="checkbox"/> Set up the appropriate functional security in SA Operator Setup for the operators who are implementing cartonization. The function acronym for the Product Cartonization Package Setup is ICSCN.	Setting operator function security
<input type="checkbox"/> Verify product dimensions on the General tab on Product Setup and Product Catalog Setup records. Check the height, length, and width. The cube value is automatically calculated. You can use SA Mass Maintenance Administration to review and update the product and catalog records. If you update the height, length, or width, the cube value is recalculated when you perform the final update.	Product Setup - General field descriptions and Product Catalog Setup - General field descriptions <i>Infor Distribution SX.e Mass Maintenance User Guide</i>
<input type="checkbox"/> Activate cartonization and set up company-level default values for units of measures and the carton ID format.	Activating cartonization
<input type="checkbox"/> Set up records that provide a general description of each type of package that you use to ship products.	Setting up a package type for cartonization
<input type="checkbox"/> Set up package group types to categorize package types.	Setting up a package group type for cartonization
<input type="checkbox"/> Set up package records for each warehouse that is enabled for cartonization.	Setting up a package for cartonization
<input type="checkbox"/> Assign dimensions weight divisors to carriers.	Assigning a dimensional weight divisor to a carrier
<input type="checkbox"/> Activate cartonization for warehouses and specify processing parameters. Optionally, override the company-level format for the carton ID format.	Setting up a warehouse for cartonization

✓	Task	Reference topic/document
<input type="checkbox"/>	Optionally, specify customer preferences for cartonization processing, shipping confirmation, and carton information on invoices. The customer settings override warehouse-level default settings.	Setting up a customer for cartonization
<input type="checkbox"/>	Specify package and packing parameters for inventory and catalog products. Optionally, override the company-level unit of measure for the products.	Setting up an inventory or catalog product for cartonization
<input type="checkbox"/>	Optionally, specify package information and dimensional measurements for products with a converted unit.	Setting up a product unit conversion record for cartonization
<input type="checkbox"/>	Set up the appropriate functional security in SA Operator Setup for the operators who will use cartonization. The function acronym for Product Cartonization Center Entry (Cartonization Center) is ICECN.	Setting operator function security
<input type="checkbox"/>	Grant authority to select operators to override the authorization point, Not All Cartons Confirmed For Shipment , for sales orders and warehouse transfers.	Setting authorization point security for multiple operators
<input type="checkbox"/>	Configure Infor Document Management or Enterprise Printing Platform to print carton labels.	<i>Infor CloudSuite Distribution Configuration Guide or Infor Distribution SX.e Integration Guide for Enterprise Printing Platform</i>

Activating cartonization

Use these instructions to activate cartonization and to set up the carton ID format. You can also specify default units of measure that are used on product, warehouse, and carton setup records.

The cartonization fields in the most related functions are not available until cartonization is activated. The exceptions are the package type and package group type tables in **SA Table Code Value Setup**, and these functions, which are controlled through operator security only, are exceptions:

- Product Cartonization Package Setup
- Product Cartonization Center Entry

- 1 Select **System Administrator > Administration > Administrator Options > System > General**.
- 2 Select **Use Cartonization**.
- 3 Specify the most common unit of measurement that you use to determine the dimensional size of packages and products in the **Package Dimensional Size Measured in Cubic** and **Package Dimensional Size Measured in Cubic** fields.

Note: You can override the **Package Dimensional Size Measured in Cubic** setting in **Product Warehouse Description Setup** and **Product Cartonization Package Setup**. You can override the **Package Dimensional Size Measured in Cubic** setting in **Product Setup** and **Product Catalog Setup**.

- 4 Optionally, customize the format of the carton ID.
 - a Select one or more of these values to include in the ID, and then specify the position of the value within the ID:

Note: Only the carton number is required for the carton ID.

 - **Use Package Type in ID**

The package type that is used in the carton ID is from the **Product Cartonization Package Setup** record. If a package type is not specified on the package setup record, then the package type from the **Package Type Used for Carton ID Label** field in this section is used.

Package types are set up in **SA Table Code Value Setup**. If a code is specified in the **Package Type Used for Carton ID Label** field on the package type record, it is used in the carton ID. If a code is not specified, the value from the **Type** field on the package type record is used.
 - **Use Warehouse in ID**
 - **Use Additional Lettering in ID**

The letters that are used in the carton ID are based on the value in the Carton ID Last Lettering field.
 - b If you selected **Use Package Type in ID**, select a value in the **Package Type Used for Carton ID label**. This package type is used in the carton ID if a package type is not specified on a **Product Cartonization Package Setup** record.
 - c If you selected **Use Additional Lettering in ID**, specify the beginning values for the first carton ID. The letter sequence increments with each carton ID. For example, if you specify **AA** in the field, AA is included in the first carton ID. AB is included in the second carton ID, and AC is used in the third carton ID. After AZ is used, BA is used. After ZZ is reached, the sequence restarts with AA.
- If you leave this field blank, AA is the starting default value.
- 5 Click **Save**.

Setting up a package type for cartonization

Set up a package type record to provide a general description of a package, such as a standard box, pallet, or dry ice container.

You can assign a package type to a product or package in these functions:

- **Product Setup**
- **Product Catalog Setup**
- **Product Extended Unit Conversion Setup**
- **Product Cartonization Package Setup**

You can also use the package type in the carton ID, which is set up at the company and warehouse levels.

- 1 Select **System Administrator > Setup > Table Code Value**.
- 2 Select **Package Type** in the **Table List** field.
- 3 Click **New**.
- 4 Specify the type of package and a description.
- 5 Click **Save**.
- 6 Optionally, specify a code in the **Package Type Used for Carton ID Label** that represents the package type in the carton ID.
Specify up to three characters. If you leave the field blank, the value in the **Type** field is used in the carton ID.
- 7 Select the **Standard Package Type** if the package is available for use with most items.
When you select this option, you are not required to specify this package type on **Product Setup**, **Product Catalog Setup**, or **Product Extended Unit Conversion Setup** records.
- 8 Click **Save**.

Setting up a package group type for cartonization

Set up package group types to associate similar package types, such as those used to ship perishable, hazardous, or fragile materials. For example, the package group type, perishable, might contain package types such as insulated box and dry ice cooler.

You can assign package group types on **Product Cartonization Package Setup** records.

- 1 Select **System Administrator > Setup > Table Code Value**.
- 2 Select **Package Group Type** in the **Table List** field.
- 3 Click **New**.

- 4 Specify the type of package group and a description.
- 5 Click **Save**.

Setting up a package for cartonization

Each package is identified with a package ID. Each package record is unique to the company and warehouse. If you use a package in more than one warehouse, use the copy feature to duplicate the package record for another warehouse.

Note: You can copy the package records to Total Warehouse Logistics (TWL) warehouses, but you cannot copy TWL package records to non-TWL warehouses.

- 1 Select **Product > Setup > Cartonization Package**.
- 2 Click **New**.
- 3 Specify this information:

Warehouse

Specify the warehouse in which the package is used.

Package ID

Specify an ID for the package. Follow the naming conventions established by your company.

Description

Specify a description for the package.

Package Type

Select a package type to provide a general description of the package. Because the package type can be specified on product records, you can use this value to associate the package with products.

Package Group

Select a package group type to assign the package to a group of similar package types. This value associates the package with products if these conditions are met in **Product Setup** or **Product Catalog Setup**:

- **Group Type Only** is selected in the **Packing Restriction** field. This setting indicates that product can be packed with other products, based on package group type.
- The package group for the package is also selected for the product.

Packing Instructions

Specify packing instructions for the package, such as **Use bubble wrap** or **Include gel ice packs**.

Package Dimensional Sized Measure in Cubic

Specify the unit of measurement (UOM) that is used to determine the size of package. The UOM from the warehouse record is the default value. If **AO Default** is selected, the UOM from **SA System Administrator-System-General** is displayed beside the field.

Height/Width/Length

Specify the height, width, and length of the package. The UOM from the **Package Dimensional Sized Measure in Cubic** field is used. Depending on the **Check Height/Width/Length When Filling** options, the package dimensions are compared to the product dimensions during the cartonization process.

Non-Dimensional

Select this option if the package is used for products, based on cube and weight measurements instead of height, width, and length. Examples include drums for liquids or pallets for large machinery. A non-dimensional product can also be an irregular size, such as rake.

Typically, a package type and a package group are specified for non-dimensional packages.

If you select this option, the **Check Height/Width/Length When Filling** options become unavailable.

Check Height/Width/Length When Filling

Select the appropriate options to compare the measurements of the package with products during the cartonization process. If you clear the options, the package cube and weight are still compared to the product.

Tare Weight

Specify the weight of the package. This value is used to determine the billable weight for shipping.

Minimum and Maximum Cube Percent

Specify the minimum and maximum fill requirements for the package. Specify **0** to indicate no requirement. The minimum cube percent cannot be greater than or equal to the maximum fill requirement. The maximum cube percent cannot be less than or equal to the minimum fill requirement.

You can override the default values that are from the warehouse record.

Minimum and Maximum Weight

Specify the minimum and maximum weight requirements for the package in pounds. Specify **0** to indicate no requirement. The minimum weight cannot be greater than or equal to the maximum weight. The maximum weight cannot be less than or equal to the minimum weight.

- 4 Click **Save**.

Assigning a dimensional weight divisor to a carrier

A carrier might use a dimensional divisor to determine the minimum dimensional weight of a package. If the actual weight of a package is less than the carrier's calculated dimensional weight, then the calculated dimensional weight is used as the billable weight.

The billable weight is calculated automatically. You can change the billable weight when you ship packages in **Product Cartonization Center Entry**.

In **SA Table Code Value Setup**, you can specify the divisor for the carrier on the Transportation Standard Carrier record, and then specify the carrier on the appropriate Ship Via records.

- 1 Select **System Administrator > Setup > Table Code Value**.
- 2 Select **Transportation Standard Carrier** in the **Table List** field.
- 3 Search for a carrier, and then click the **right arrow** to open the record.
- 4 Click **Edit**.
- 5 Specify the divisor in the **Carrier Dimension Weight Divisor** field.
- 6 Click **Save**.
- 7 Select **Ship Via** in the **Table List** field.
- 8 Search for ship via method that uses the carrier, and then click the **right arrow** to open the record.
- 9 Click **Edit**.
- 10 Specify the carrier in the **Transportation Standard Carrier** field.
- 11 Click **Save**.

Setting up a warehouse for cartonization

- 1 Select **Product > Setup > Warehouse**.
- 2 Search for the warehouse to set up for cartonization, and then click the **right arrow** to open the record.
- 3 Click **Cartonization**, and then click **Edit**.
- 4 Specify this information:

Use Cartonization

Select one of these values to indicate how packages from the warehouse should be processed:

- **Auto Assign Order Entry Order**
Cartons are automatically assigned when pick tickets are printed for sales orders. If cartons were assigned to a sales order in the **Cartonization Center** before picking occurred, those cartons are used.
- **Auto Assign Warehouse Transfers**
Cartons are automatically assigned when pick tickets are printed for warehouse transfers. If cartons were assigned to a transfer in the **Cartonization Center** before picking occurred, those cartons are used.
- **Auto Assign Orders and Transfers**
Cartons are automatically assigned when pick tickets are printed for sales orders and warehouse

transfers. If cartons were assigned in the **Cartonization Center** before picking occurred, those cartons are used.

- **Manually Assign Order Entry Order**

The operator can automatically or manually assign cartons to sales orders in the **Cartonization Center** before or after picking.

- **Manually Assign Warehouse Transfers**

The operator can automatically or manually assign cartons to warehouse transfers in the **Cartonization Center** before or after picking.

- **Manually Assign Orders and Transfers**

The operator can automatically or manually assign cartons to sales orders and warehouse transfers in the **Cartonization Center** before or after picking.

Process Warehouse Transfer Direct Orders Only When Using Auto

Select this option to limit automatic assignment of cartons to warehouse transfer direct orders. Automatic assignment of cartons only occurs when the pick tickets are printed through the **Transfer Entry Print WT Report**.

The use of cartonization on a warehouse transfer direct order is determined by the customer on the tied sales order. If the customer uses the warehouse default settings, then use of cartonization is based on the warehouse.

Multiple Orders Combined in Cartons When Same Ship To Location

Select this option to allow products from multiple orders to be combined in cartons that are being shipped to the same location. The cartons are shipped by the same carrier.

Shipping Confirmation

Select this option to require shipping confirmation before the sales order or transfer can be shipped. Shipping is confirmed when all products and cartons for an order or transfer were shipped.

Operators can override the shipping confirmation requirement when shipping an order or transfer, if granted authorization. You must set up the override capability in **SA Authorization Point Setup**.

Minimum Cube Percent and Maximum Cube Percent

Specify the minimum and maximum fill requirements for a package. These values are the default values for the same fields on **Product Cartonization Package Setup** records that are set up for the warehouse.

Track Contents of Packages

Select this option to track the quantity of each product in each package. The information is displayed in the **Cartonization Center** and included in BODs and on documents such as pick tickets and invoices.

Print Carton Information on Advanced Shipping Notice (ASN)

Select this option to include carton information on EDI 856 Advance Ship Notices that are sent to the customer through ION BODs.

Print Carton Information on Invoice Prints

Select a value to indicate what type of carton information to include on an invoice. Include item-level or order-level information, or both or neither.

This setting only affects invoices that are generated in Print Format 4 to Infor Document Management's

Output Management and third-party applications. It does not affect invoices that are output directly to a printer.

Package Dimensional Size Measured in Cubic

Specify the most common unit of measurement that is used to determine the size of packages in the warehouse. If you select **AO Default** to use the UOM from **SA System Administrator-System-General**, the UOM is displayed beside the field.

- 5 To override the carton ID defaults that are set up for the system in **SA Administrator Options-System-General**, select **Load Carton ID from Warehouse Settings**. Then, customize the format of the carton ID.

- a Select one or more of these values to include in the ID and then specify the position of the value within the ID:

Note: Only the carton number is required for the carton ID.

- **Use Package Type in ID**

The package type that is used in the carton ID is from the **Product Cartonization Package Setup** record. If a package type is not specified on the package setup record, then the package type from the **Package Type Used for Carton ID Label** field in **SA Administrator Options-System-General** is used.

Package types are set up in **SA Table Code Value Setup**. If a code is specified in the **Package Type Used for Carton ID Label** field on the package type record, it is used in the carton ID. If a code is not specified, the value from the **Type** field on the package type record is used.

- **Use Warehouse in ID**

- **Use Additional Lettering in ID**

The letters that are used in the carton ID are based on the value in the **Carton ID Last Lettering** field.

- b If you selected **Use Additional Lettering in ID**, specify the beginning values for the first carton ID. The letter sequence increments with each carton ID. For example, if you specify **AA** in the field, **AA** is included in the first carton ID. **AB** is included in the second carton ID, and **AC** is used in the third carton ID. After **AZ** is used, **BA** is used. After **ZZ** is reached, the sequence restarts with **AA**. If you leave this field blank, **AA** is the starting default value.

- 6 Click **Save**.

Setting up a customer for cartonization

Specify cartonization settings for a customer only if the customer's requirements are different than warehouse cartonization settings. By default, warehouse cartonization settings are used for customers.

- 1 Select **Customer > Setup > Customer**.
- 2 Search for the customer to set up for cartonization, and then click the **right arrow** to open the record.

3 Click **Cartonization**, and then click **Edit**.

4 Specify this information:

Use Cartonization

Select one of these values to indicate how packages from the warehouse should be processed:

- **Warehouse Default**
Carton processing is based on the **Use Cartonization** field on the **Product Warehouse Description Setup** record for the warehouse on the sales order or warehouse transfer.
- **Auto Assign Order Entry Order**
Cartons are automatically assigned when pick tickets are printed for sales orders. If cartons were assigned to a sales order in the **Cartonization Center** before picking occurred, those cartons are used.
- **Auto Assign Warehouse Transfers**
Cartons are automatically assigned when pick tickets are printed for warehouse transfers. If cartons were assigned to a transfer in the **Cartonization Center** before picking occurred, those cartons are used.
- **Auto Assign Orders and Transfers**
Cartons are automatically assigned when pick tickets are printed for sales orders and warehouse transfers. If cartons were assigned in the **Cartonization Center** before picking occurred, those cartons are used.
- **Manually Assign Order Entry Order**
The operator can automatically or manually assign cartons to sales orders in the **Cartonization Center** before or after picking.
- **Manually Assign Warehouse Transfers**
The operator can automatically or manually assign cartons to warehouse transfers in the **Cartonization Center** before or after picking.
- **Manually Assign Orders and Transfers**
The operator can automatically or manually assign cartons to sales orders and warehouse transfers in the **Cartonization Center** before or after picking.
- **No Cartonization**
The customer does not participate in the cartonization program.

Shipping Confirmation

Select one of these values:

- **Warehouse Default**
Select this option to use to the shipping confirmation setting for the warehouse on the sales order or warehouse transfer.
- **Confirm Cartons**
Select this option to require shipping confirmation before the sales order or transfer can be shipped. Shipping is confirmed when all products and cartons for an order or transfer were shipped.

Operators can override this option when shipping an order or transfer, if granted authorization. You must set up the override capability in **SA Authorization Point Setup**.

- **Do Not Confirm**

The customer does not require shipping confirmation.

Print Carton Information on Invoice Prints

Note: This option does not affect invoices that are output to a printer.

Select one of these values:

- **Warehouse Default**

Select this option to use the **Print Carton Information on Invoice Prints** setting for the warehouse on the sales order or warehouse transfer.

- **Print on Invoice**

Select this value to include carton information on invoices that are generated in Print Format 4 to Infor Document Management's Output Management and third-party applications.

- **Do Not Print**

Select this value to exclude carton information on the customer's invoices.

5 Click **Save**.

Setting up an inventory or catalog product for cartonization

The cartonization settings for products are available in **Product Setup** and **Product Catalog Setup**. During cartonization processing, cartonization settings on product records take precedence over catalog product records.

Specify cartonization settings for a product only if the product requires special packaging or handling.

- 1** Select **Product > Setup > Product** to specify cartonization settings for an inventory product, or select **Product > Setup > Catalog** to specify cartonization settings for a catalog product.
- 2** Search for the product to set up for cartonization, and then click the **right arrow** to open the record.
- 3** On the General tab, verify that values are specified for the length, width, and height of the product. The values are required for the auto-cartonization process.
- 4** Click **Cartonization**, and then click **Edit**.
- 5** Specify this information, if it applies to the cartonization requirements of the product:

Package Type

Specify the package type that is required for the product. You can leave the field blank if the product can ship in a standard package.

Manually Pack - Special Dimension Item

Select this option if the product cannot be packed in a standard box, based on cubic dimensions.

Packing Instructions

Specify any special packing instructions for the product. The instructions are included on the pick ticket.

Item Dimensional Sized Measure in Cubic

Specify the unit of measurement (UOM) to use to determine the size of product. If you select **AO Default** to use the UOM from **SA System Administrator-System-General**, the UOM is displayed beside the field.

Shelf to Ship Package

Select this option if the product can be shipped in the packaging in which it is stored without further packing. Examples include boxes of tiles, small air conditioning units, or ready-to-assemble furniture. If the unit for a line item corresponds to the stocking unit on this record, a carton ID is assigned to the container in which the product is packaged.

Packing Restriction

Select one of these values to place packing restrictions on the product:

Do Not Mix

The product must be packed individually.

Group Type Only

The product can be packed with other products, based on the package group types that you select.

To select a package group type, click the package group type and then click the **right arrow**.

Alternatively, drag a package group type into the Selected column.

- 6 Click **Save**.

Setting up a product unit conversion record for cartonization

To include a product with a converted unit in cartonization processing, you must specify cartonization settings on the unit conversion record.

- 1 Select **Product > Setup > Extended Unit Conversion**.
- 2 Search for the record to set up for cartonization, and then click the **right arrow** to open the record.
- 3 Click **Edit**.
- 4 Specify this information:

Package Type

Specify the package type that is required for the product. You can leave the field blank if the product can ship in a standard package.

Shelf to Ship Package

Select this option if the product can be shipped in the packaging in which it is stored without further packing. If the unit for a line item corresponds to the unit on this record, a carton ID is assigned to the product and it is included in the carton count.

Calculate Dimensional Size on Unit

Select this option to specify the dimensions of the product in the converted unit. If you leave this field blank, the product dimensions from **Product Setup** are used to determine the dimensions for the unit conversion product.

- 5 If you selected **Calculate Dimensional Size on Unit**, specify this information:

Unit Dimensional Sized Measure in Cubic

Specify the unit of measure (UOM) to use to determine the size of product in the unit on this record. If you select **AO Default** to use the UOM from **SA System Administrator-System-General**, the UOM is displayed beside the field.

Tare Weight

Specify the weight of the package without the product.

Height/Width/Length

Specify the height, width, and length of the product in the converted unit. The cube value is automatically calculated.

If you sell products that can be nested during shipment, specify the dimensions for the products when they are nested. For example, suppose you sell bowls individually or in pack of four. The dimensions in inches for an individual bowl are 2x6x6. The dimensions in inches for a pack of four nested bowls are 4.5x6x6.

- 6 Click **Save**.

Using cartonization

Manually assigning products to cartons

Use these instructions to manually assign one or more products on a sales order or warehouse transfer to a carton.

You might manually assign products to cartons for these reasons:

- The warehouse or customer requires manual assignment.
- The product is identified as a special-dimension product.
- The product is a nonstock product without a **Product Catalog** record.

See [Manually assigning a nonstock to a carton](#).

- 1 Select **Product > Entry > Cartonization Center**.
- 2 Search for the order to manually process, and then click the **right arrow** to open the record.
- 3 Click **Manually Create/Change Cartons**.
- 4 Select a product in the Unpackaged Items grid, and then click **Add To Carton**.
- 5 Specify this information:

Add To

Select **Existing Carton** to add the product to a carton that is already included on the order. Select that carton in the **Carton ID** field.

Select **New Carton** to create another carton for the order, and then select the package to use.

Quantity

Specify the quantity of the product to add to the carton.

- 6 Click **OK**, and then click **Save** to update the Package Detail grid.
If you included the product in a new package, the carton ID is generated.
- 7 Review the Item Package Type for the product to ensure that you selected the appropriate type of package.
- 8 Repeat the previous steps to assign any remaining unpackaged products to cartons.
- 9 Click the **back arrow** to return to the Packages page.
- 10 If you manually assigned a special dimension product to a carton, select the exception in the grid, and then click **Delete**.

Manually assigning a nonstock to a carton

If you do not maintain a product catalog record for a nonstock, the dimensions and weight of the nonstock are not available to automatically assign it to a package. You must manually select an existing or new package for the nonstock.

- 1 Select **Product > Entry > Cartonization Center**.
- 2 Search for the order with the nonstock product, and then click the **right arrow** to open the record.
- 3 Click **Manually Create/Change Cartons**.
- 4 In the Unpackaged Items grid, select the nonstock and then click **Add to Carton**.
- 5 Specify the weight and dimensions of the nonstock.
- 6 Optionally, specify special instructions for the nonstock.
- 7 Click **Next**.
- 8 To include the nonstock in an existing package:
 - a Select **Existing Carton**.
 - b Select the carton.
 - c Specify the quantity to add to the carton.
 - d Click **OK**.
- 9 To include the nonstock in a new package:
 - a Select **New Carton**.
 - b Select a package.
 - c Specify the quantity to add to the carton.
 - d Click **OK**.
- 10 Click **Save** to update the Package Detail grid.

If you included the nonstock in a new package, the carton ID is generated.
- 11 Click the **back arrow** to return to the Packages page.
- 12 Select the exception in the grid, and then click **Delete**.

Changing automatically assigned cartons

Use these instructions to manually assign different packages for products than the packages that were automatically assigned by the cartonization process. You can move products from one carton to another, or delete cartons and then create new cartons using different packages.

- 1 Select **Product > Entry > Cartonization Center**.

- 2 Search for the order, and then click the **right arrow** to open the record.
Automatically Generated is displayed in the Origin column if the packages were automatically selected.
- 3 Click **Manually Create/Change Cartons** to view package details for each package on the order.
- 4 To move all quantity of a product from one carton to another, select the appropriate carton in the **Carton ID** field, and then click **Save**.
- 5 To move specified quantities of a product to another carton:
 - a Select the product in the Package Detail grid, and then click **Delete**.
 - b Click **Yes** to confirm.
 - c Select the product in the Unpackaged Items grid, and then click **Add To Carton**.
 - d Select **Existing Carton**.
 - e Select the carton.
 - f Specify the quantity to add to the carton.
 - g Click **OK**, and then click **Save**.
- 6 To add a product to a new package:
 - a Select the product in the Package Detail grid, and then click **Delete**.
 - b Click **Yes** to confirm.
 - c Select the product in the Unpackaged Items grids, and then click **Add To Carton**.
 - d Select **New Carton**.
 - e Select a package.
 - f Specify the quantity to add to the carton.
 - g Click **OK**, and then click **Save**.

Deleting cartons on a sales order or warehouse transfer

Use these instructions to delete selected cartons on a sales order or warehouse transfer. You can delete one carton, multiple cartons, or all cartons. You can then automatically or manually re-assign cartons.

If you attempt to delete a carton with a status of **Shipped**, an error is displayed. Select **Action > Unship Packages** to unship the carton, and then delete the carton.

- 1 Select **Product > Entry > Cartonization Center**.
- 2 Search for the order.
- 3 To delete all cartons for the order:
 - a Select the order, and then click **Delete Packages**.
 - b Click **Yes** to confirm.
- 4 To delete select cartons:
 - a Click the **right arrow** to open the order.

- b** Select the cartons to delete, and then click **Delete**.
- c** Click **Yes** to confirm.

Automatically assigning cartons in the Cartonization Center

If cartons are not assigned to a sales order or warehouse transfer, you can apply automatic cartonization in the **Cartonization Center**.

Use these instructions to apply automatic cartonization to a single order type:

- 1** Select **Product > Entry > Cartonization Center**.
- 2** Search for the order, and then select it.
- 3** Click **Auto Cartonization**.
- 4** Click **OK** to create a shipment ID automatically.
Alternatively, manually specify the shipment ID.
 - a** Clear the **Auto-Create Shipment ID** option.
 - b** Specify the shipment ID, and then click **OK**.
- 5** Open the order to view the cartons.
- 6** Click **Manually Create/Change Cartons** to view the package details.

Manually combining sales orders or transfers for shipment

If allowed by the warehouse, products from multiple orders with the same shipping location and carrier can be combined in cartons. Orders on the same **Sales Entry Pick Tickets Report** or **Transfer Entry Print WT Report** are combined automatically if the cartons are assigned automatically. If orders are not combined automatically, use these instructions to manually combine them.

- 1** Select **Product > Entry > Cartonization Center**.
- 2** Click **Advanced Search**.
- 3** Conduct a search to find orders that can be combined.
- 4** Select the orders to combine, and then click **Delete Packages** to remove any cartons that are already assigned to an order.
- 5** Click **Auto Cartonization**.

- 6 Click **OK** to create a shipment ID automatically.
Alternatively, manually specify the shipment ID:
 - a Clear the **Auto-Create Shipment ID** option.
 - b Specify the shipment ID, and then click **OK**.
- 7 If the orders cannot be combined, errors are displayed. Correct the errors and then apply automatic cartonization again.

Shipping cartons

- 1 Select **Product > Entry > Cartonization Center**.
- 2 Search for the order to ship, and then click the **right arrow** to view the cartons that were created for the order.

If the **Combined Orders** option in the Orders grid is selected for an order, the order was combined with other orders with the same shipping location and carrier. The cartons for the order that you selected might contain products from other orders.
- 3 Click **Manually Create/Change Cartons** to view package details for all packages for the order.

If the order is combined with other orders, perform these steps to view the products and packages that are related to the order record that you selected:

 - a Select **This Order Only**.
 - b Click **Filter**.
- 4 Click the **back arrow** to return to the Packages page.
- 5 Select one or more packages, and then select **Action > Ship Packages**.
- 6 For each package, specify this information:
 - a Specify the freight amount or select **Free Shipping**.

Note the freight amount for each package. You must manually add the total freight amount as an addon before you ship the order.
 - b Specify the package number for the order and the tracking ID.
 - c Optionally, change the billable weight to the actual weight of the package.

The value in the **Weight** field is the weight of the package, based on product and package weight values in the system. The value in the **Dimensional Weight** field is the calculated weight, based on the cubic measurement of the package divided by the dimensional divisor for the carrier. By default, the higher weight is used as the billable weight.
 - d After you have processed each package, click **OK**.

The packages are moved to the **Shipped** stage. Note that the **All Cartons Confirmed** option is selected.

Unshipping or staging cartons

If cartons in the **Shipped** stage did not ship, you can move them to one of these stages until they are shipped:

- **Staged**
Move cartons to the Staged stage if shipment is expected to occur by the end of the day.
- **Unshipped**
Move the cartons to the **Unshipped** stage if shipment is not expected to occur by the end of the day. You must also move a carton to the **Unshipped** stage if you must change the freight amount for a carton.

Use these instructions to either unship or stage cartons from the main **Cartonization Center** page. You can also unship cartons from the **Action** menu on the **Packages** page.

- 1 Select **Product > Entry > Cartonization Center**.
- 2 Search for the order with the cartons to unship or stage, and then select it.
- 3 From the Actions menu, select one of these options:
 - **Set Cartons to Unshipped (from Shipped)**
Select the cartons to unship, and then click **OK**.
 - **Set Cartons to Stage (from Shipped)**
All cartons on the order are automatically moved to **Staged**.

Printing labels in the Cartonization Center

If you print labels using Infor Document Management or Enterprise Printing Platform, you can print these types of labels from the main page in the **Cartonization Center**:

- Product
- Carton
- Shipping
- Package

You can also print package labels from the **Packages** page. Select one or more cartons, and then select **Actions > Print Package Labels**.

- 1 Select **Product > Entry > Cartonization Center**.
- 2 Select one or more orders.
- 3 From Actions menu, select the type of label to print.
- 4 Specify the number of labels to print and the printer.
- 5 To print an individual product or carton label, select the option to print a specific label and then specify the product or carton ID.
- 6 Click **Print**.

Reference topics

Customer Setup - Cartonization overview

Customer > Setup > Customer

Use this page to specify customer preferences for cartonization processing, shipping confirmation, and carton information on invoices. The customer settings override the cartonization defaults that are set up at the warehouse level.

Specify cartonization settings for a customer only if the customer's requirements are different than warehouse cartonization settings. By default, warehouse cartonization settings are used for customers.

If a warehouse is not set up for cartonization, the cartonization settings at the customer level determine if cartonization is used. A customer might require cartonization carton ID labels and detailed package labels on orders even if they are shipped from a warehouse that is not set up for cartonization.

The settings that pertain to warehouse transfers only pertain to warehouse transfer direct orders (WT DOs). If a warehouse does not use cartonization, cartonization that is based on customer preference can only be applied to warehouse transfers that are tied to sales orders.

Product Cartonization Center Entry overview

Product > Entry > Cartonization Center

Function acronym: ICECN

Use this function to ship cartons that were automatically or manually created for sales orders and warehouse transfers as part of the cartonization process. You can also manually create or change cartons and print carton labels.

On this page you can perform these actions:

- Perform an advanced search of carton records.
Note: When you specify a packaged product, the carton and exception records are searched, not the order or transfer records.
- Ship, unship, and stage all cartons on an order or transfer.
You can only move cartons to the Staged or Unshipped stage from the Shipped stage. If you must change the freight amounts for shipped cartons, you must move them to the Unshipped stage.
- Print carton, product, shipping, and package labels.

- Automatically apply cartonization to sales orders and transfers, if allowed, based on cartonization settings on warehouse, customer, and product records.
- Delete the cartons that were automatically or manually created for orders and transfers.

Product Cartonization Center Entry - Packages overview

Product > Entry > Cartonization Center

Use this page to ship and unship cartons for sales orders or warehouse transfers. You can also delete cartons and print package labels.

On this page you can perform these actions:

- Review basic sales order or transfer header information, such as the order or transfer number, customer, and warehouse, among other values.
- Review information about the cartons on an order.
If the **All Cartons Confirmed** option is selected, then all cartons for the order or transfer are shipped. If the **Shipping Confirmation** option is selected on the warehouse record, the cartons must be shipped before you can ship the order or transfer.
- Delete one or more cartons on the order or transfer.
You can then click **Manually Create/Change Cartons** to access the **Package Detail** page to create cartons.
- Ship and unship cartons.
When you ship cartons, you can specify the billable weight, freight amount, package number, and tracker ID. You can also select free shipping.
- Print package labels.

Product Cartonization Center Entry - Package Detail overview

Product > Entry > Cartonization Center

Use this page to manually assign products on sales orders or warehouse transfers to new or existing cartons. You can also delete cartons that were automatically or manually created for orders and transfers.

If you manually assign products to cartons, you are not required to observe the parameters that were set up for the automatic cartonization process. We recommend that you adhere to the parameters that affect customer satisfaction and your company's packing and shipping efficiencies.

Product Cartonization Center Entry - Print Labels overview

Product > Entry > Cartonization Center

Use this page to print labels that are associated with cartonization, such as product, package, carton, and shipping labels. You must use Infor Document Management or Enterprise Printing Platform, a third-party labeling software.

Product Cartonization Package Setup overview

Product > Setup > Cartonization Package

Function acronym: ICSCN

Use this function to maintain package records that are used for cartonization. Each package is identified with a package ID and is unique to the company and warehouse.

If you use a package in more than one warehouse, use the copy feature to duplicate the package record for another warehouse.

Note: You can copy the package records to Total Warehouse Logistics (TWL) warehouses, but you cannot copy TWL package records to non-TWL warehouses.

Product Cartonization Package Setup field descriptions

The fields are listed in alphabetical order within each section.

Details

Active

Clear this option to deactivate the record. By default, the record is active when you create it.

Description

Specify a description for the package.

Package Group

Select a package group type to assign the package to a group of similar package types. This value associates the package with products if these conditions are met in **Product Setup** or **Product Catalog Setup**:

- **Group Type Only** is selected in the **Packing Restriction** field. This setting indicates that product can be packed with other products, based on package group type.

- The package group for the package is also selected for the product.

Package ID

Specify an ID for the package. Follow the naming conventions established by your company.

Package Type

Select a package type to provide a general description of the package. Because the package type can be specified on product records, you can use this value to associate the package with products.

Packing Instructions

Specify packing instructions for the package, such as **Use bubble wrap** or **Include gel ice packs**.

Warehouse

Specify the warehouse in which the package is used.

Dimensions

Check Height/Width/Length When Filling

Select the appropriate options to compare the measurements of the package with products during the cartonization process. If you clear the options, the package cube and weight are still compared to the product.

Height/Width/Length

Specify the height, width, and length of the package. The UOM from the **Package Dimensional Sized Measure in Cubic** field is used. Depending on the **Check Height/Width/Length When Filling** options, the package dimensions are compared to the product dimensions during the cartonization process.

Minimum and Maximum Cube Percent

Specify the minimum and maximum fill requirements for the package. Specify **0** to indicate no requirement. The minimum cube percent cannot be greater than or equal to the maximum fill requirement. The maximum cube percent cannot be less than or equal to the minimum fill requirement.

The default values are from the warehouse record.

Minimum and Maximum Weight

Specify the minimum and maximum weight requirements for the package in pounds. Specify **0** to indicate no requirement. The minimum weight cannot be greater than or equal to the maximum weight. The maximum weight cannot be less than or equal to the minimum weight.

Non-Dimensional

Select this option if the package is used for products, based on cube and weight measurements instead of height, width, and length. Examples include drums for liquids or pallets for large machinery. A non-dimensional product can also be an irregular size, such as rake.

Typically, a package type and a package group are specified for non-dimensional packages.

If you select this option, the **Check Height/Width/Length When Filling** options become unavailable.

Package Dimensional Sized Measure in Cubic

Specify the unit of measurement (UOM) that is used to determine the size of package. The UOM from the warehouse record is the default value. If **AO Default** is selected, the UOM from **SA Administrator Options-System-General** is displayed beside the field.

Tare Weight

Specify the weight of the package. This value is used to determine the billable weight for shipping.

Transportation

Transportation Package Type

If you are integrated to Infor Rate Shopping - TM to obtain freight rates in **Sales Order Entry-Freight Rate Shop**, select the appropriate package type from the list.

Each package record must be associated with an Infor Rate Shopping - TM Transportation Package Type. The Package Type ID associated with each **Product Cartonization Package Setup** record can be assigned in Sales Order Entry-Freight Rate Shop in the Packages grid.

You can also assign a Product Cartonization Package Setup ID to products in **Product Setup-Cartonization**.

Product Setup - Cartonization overview

Product > Setup > Product

Use this page to specify package and packing parameters that are used during cartonization. You are not required to specify cartonization settings for products that can ship in the standard packages.

If a product cannot ship in a standard package, or otherwise requires special handling during cartonization, use this page to specify this information:

- Required package type
- Packing restrictions
- Packing instructions

You can also indicate if the product requires manual packing or can be shipped without further packing. Optionally, you can override the company-level unit of measure (UOM) for the product.

Note: If you use Total Warehouse Logistics (TWL), ensure that you use the same UOM for TWL bin dimensions and all cartonization setups.

Product Setup - Cartonization field descriptions

The fields are listed in alphabetical order.

Item Dimensional Size Measured in Cubic

Specify the unit of measurement (UOM) to use to determine the size of product. If you select **AO Default** to use the UOM from **SA System Administrator-System-General**, the UOM is displayed beside the field.

Manually Pack - Special Dimension Type

Select this option if the product cannot be packed in a standard box, based on cubic dimensions.

Package Type

Specify the package type that is required for the product. You can leave the field blank if the product can ship in a standard package.

Packing Instructions

Specify any special packing instructions for the product. The instructions are included on the pick ticket.

Packing Restrictions

Select one of these values to place packing restrictions on the product:

- **Do Not Mix**
The product must be packed individually.
- **Group Type Only**
The product can be packed with other products, based on the package group types that you select.
To select a package group type, click the package group type, and then click the **right arrow**.
Alternatively, drag a package group type into the Selected column.

Shelf to Ship Package

Select this option if the product can be shipped in the packaging in which it is stored without further packing. Examples include boxes of tiles, small air conditioning units, or ready-to-assemble furniture. If the unit for a line item corresponds to the stocking unit on this record, a carton ID is assigned to the container in which the product is packaged.

Product Warehouse Description Setup - Cartonization overview

Product > Setup > Warehouse Description

Use this page to activate cartonization for the warehouse and specify cartonization processing parameters. You can also override the company-level format for the carton ID format.

You must activate cartonization at the warehouse level. If you leave **No Cartonization** in the **Use Cartonization** field, the warehouse is excluded from the cartonization program. Warehouses that are excluded at the warehouse level are required to use cartonization if the customer on a sales order or warehouse transfer uses cartonization.

Product Warehouse Description Setup - Cartonization field descriptions

Fields are listed in alphabetic order within each section.

Cartonization

Minimum Cube Percent and Maximum Cube Percent

Specify the minimum and maximum fill requirements for a package. These values are the default values on **Product Cartonization Package Setup** records that are set up for the warehouse.

Multiple Orders Combined in Cartons When Same Ship To Location

Select this option to allow products from multiple orders to be combined in cartons if these conditions are met:

- The cartons are being shipped to the same location.
- Thee cartons are transported by the same carrier.

Package Dimensional Size Measured in Cubic

Specify the most common unit of measurement that is used to determine the size of packages in the warehouse. If you select **AO Default** to use the UOM from **SA System Administrator-System-General**, the UOM is displayed beside the field.

Print Carton Information on Advanced Shipping Notice (ASN)

Select this option to include carton information on EDI 856 Advance Ship Notices that are sent to the customer through ION BODs.

Print Carton Information on Invoice Prints

Select a value to indicate the type of carton information to include on an invoice. You can include item-level or order-level information, or both or neither.

This setting only affects invoices that are generated in Print Format 4 to Infor Document Management's Output Management and third-party applications. It does not affect invoices that are output directly to a printer.

Process Warehouse Transfer Direct Orders Only When Using Auto

Select this option to limit automatic assignment of cartons to warehouse transfer direct orders. Automatic assignment of cartons only occurs when the pick tickets are printed through the **Transfer Entry Print WT Report**.

Cartonization processing for a warehouse transfer direct order is determined by the customer on the tied sales order. If the customer uses the warehouse default settings, then cartonization processing is based on the warehouse settings.

Shipping Confirmation

Select this option to require shipping confirmation before the sales order or transfer can be shipped. Shipping is confirmed when all products and cartons for an order or transfer were shipped.

Operators can override the shipping confirmation requirement when shipping an order or transfer, if granted authorization. You must set up the override capability in **SA Authorization Point Setup**.

Track Contents of Packages

Select this option to track the quantity of each product in each package. The information is displayed in the **Cartonization Center** and is included in BODs and on documents such as pick tickets and invoices.

Use Cartonization

Select one of these values to indicate how packages from the warehouse should be processed:

- **Auto Assign Order Entry Order**
Cartons are automatically assigned when pick tickets are printed for sales orders. If cartons were assigned to a sales order in the **Cartonization Center** before picking occurred, those cartons are used.
- **Auto Assign Warehouse Transfers**
Cartons are automatically assigned when pick tickets are printed for warehouse transfers. If cartons were assigned to a transfer in the **Cartonization Center** before picking occurred, those cartons are used.
- **Auto Assign Orders and Transfers**
Cartons are automatically assigned when pick tickets are printed for sales orders and warehouse transfers. If cartons were assigned in the **Cartonization Center** before picking occurred, those cartons are used.
- **Manually Assign Order Entry Order**
The operator can automatically or manually assign cartons to sales orders in the **Cartonization Center** before or after picking.
- **Manually Assign Warehouse Transfers**
The operator can automatically or manually assign cartons to warehouse transfers in the **Cartonization Center** before or after picking.
- **Manually Assign Orders and Transfers**
The operator can automatically or manually assign cartons to sales orders and warehouse transfers in the **Cartonization Center** before or after picking.

Format Carton ID

Carton ID Last Lettering

If you selected **Use Additional Lettering in ID**, specify the beginning values for the first carton ID.

The letter sequence increments with each carton ID. For example, if you specify **AA** in the field, **AA** is included in the first carton ID. **AB** is included in the second carton ID, and **AC** is used in the third carton ID. After **AZ** is used, **BA** is used. After **ZZ** is reached, the sequence restarts with **AA**.

If you leave this field blank, **AA** is the starting default value.

Carton ID Last Number

This read-only value represents the number last used by the system for a carton ID.

Load Carton ID from Warehouse Settings

Select this option to override the carton ID defaults that are set up for the system in **SA Administrator Options-System-General**.

Use Additional Lettering in ID

Select this option to include additional letters in the carton ID.

Use Package Type in ID

Select this option to include the package type from the **Product Cartonization Package Setup** record in the carton ID.

If a package type is not specified on the package setup record, then the package type from the **Package Type Used for Carton ID Label** field in **SA Administrator Options-System-General** is used.

Package types are set up in **SA Table Code Value Setup**. If a code is specified in the **Package Type Used for Carton ID Label** field on the package type record, it is used in the carton ID. If a code is not specified, the value from the **Type** field on the package type record is used.

Use Warehouse in ID

Select this option to include the warehouse on the sales order or warehouse transfer in the carton ID.

Positions of ID information

These fields might be available, depending on the values that you selected to include in the carton ID:

- **Additional Lettering**
- **Carton Number**
- **Package Type**
- **Warehouse**

Specify a number, 1-4, in each field to indicate the position of the value within the carton ID.

Note: Only the carton number is required for the carton ID.

SA Table Code Value Setup - Package Group Type overview

System Administrator > Setup > Table Code Value

Use this page to create or maintain categories of similar package types, such as those used to ship perishable, hazardous, or fragile materials. You can specify a package group type that is up to eight characters in length and a description.

Package group types and package types are used in cartonization. You can assign package group types on **Product Cartonization Package Setup** records.

SA Table Code Value Setup - Package Type overview

System Administrator > Setup > Table Code Value

Use this page to create or maintain general descriptions of packages that are used for cartonization. The package type, or a code for the package type, can be included in carton IDs.

A package type can be assigned to a product or package in these functions:

- **Product Setup**
- **Product Catalog Setup**
- **Product Extended Unit Conversion Setup**
- **Product Cartonization Package Setup**

SA Table Code Value Setup - Package Type field descriptions

The fields are organized by section.

General

Type

Specify an alpha-numeric code that represents a type of package, for example, stdbox1, pallet, or dryice. You can specify up to eight characters.

Description

Specify a description of the package type.

Extended

Package Type Used for Carton ID Label

Specify a code to use for the package type in the carton ID.

Specify up to three characters. If you leave the field blank, the value in the **Type** field is used in the carton ID.

Standard Package Type

Select this option if the package is available for use with most products.

If this option is selected, you are not required to specify the package type on **Product Setup**, **Product Catalog Setup**, and **Product Extended Unit Conversion Setup** records.

SA Table Code Value Setup - Transportation Standard Carrier overview

System Administrator > Setup > Table Code Value

Use this page to set up codes that represent freight carriers. If you use cartonization, you can specify the dimensional weight divisor for each carrier.

SA Table Code Value Setup - Transportation Standard Carrier field descriptions

The fields are organized by section.

General

Standard Carrier

Specify a code that represents a freight carrier. You can specify a code that meets EDI standards, such as the Standard Carrier Alpha Code (SCAC), but it is not required.

The code can be specified on the Ship Via records in **SA Table Code Value Setup** for inclusion in the Sync.PurchaseOrder BOD.

Description

Specify a description for the code.

Extended

Carrier Dimensional Weight Divisor

Specify the dimensional weight divisor that the carrier uses to determine the minimum dimensional weight of a package. If the actual billable weight of a package is less than the carrier's calculated dimensional weight, then the calculated dimensional weight is used as the freight weight.

This field is available only if cartonization is activated.