

AGGREGATE INVENTORY PROCESSING.....3

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AGGREGATE INVENTORY PROCESSING

Overview

The purpose of this function is to allow SYNAPSE installations to bypass detailed license plate receiving and shipping activities for selected customers while still taking advantage of the accurate inventory tracking, lot tracking, billing and other functions. Features include:

- All processing is done using the on-line system without the use of RF.
- Physical license plate labeling is not required.
- Receipt orders are built, received, and closed using one online screen.
- Outbound orders are entered individually using normal order entry options and are planned into waves. The orders are picked, staged and loaded using one online screen.
- Orders can be de-picked using an online screen.
- Inventory can be moved to a different location using an online screen.
- A customer that is designated as an aggregate inventory customer must process all inventory using this method.

Note: Please see the Physical Inventory Chapter for information on PI for Aggregate Customers.

Customer Setup

Customer AGCALJAM - Aggregate California Distribution

Customer ID: **AGCALJAM** Status: **Active** Clone

Name: **Aggregate California Distribution** Phone: **902-575-668** Consumables Owner:

Lookup: **AGGREGATE CALIFORNIA DISTRIBUTION** FAX:

Contact: **Arnold Fink** E-Mail:

Address: **98765 American Way** Primary CSR:

City: **Liberty** State/Province: **CA** ☒ Track Pallets ☐ Collect Pro Numbers ☐ Allow Pick Passing

Postal Code: **99942** Country: **USA** ☐ Bill For Pallets Duplicate Order Reference Allowed:

Master Account: Manufacturer UCC Code: Recent Order Days: Min O-Qty Weight: Reduce Order Qty By Cancel Amount:

☐ Yes ☐ No ☒ Default

Additional Contacts

	Phone	FAX	E-Mail
1.			
2.			
3.			
4.			
5.			

Customer Logo: Default Order Attachment Directory:

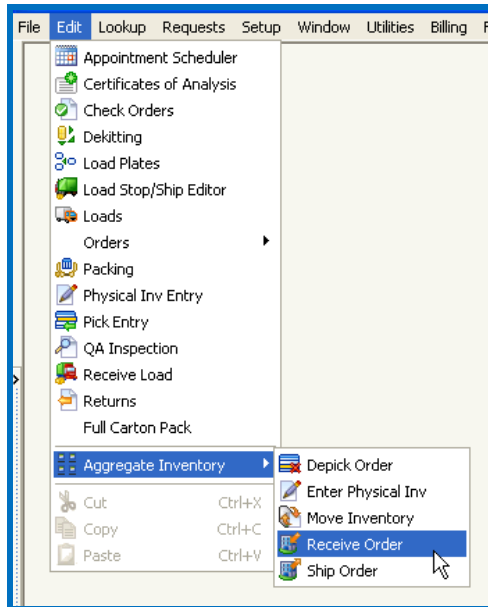
LINUX2TEST Facility ZET (Last Update by ANN at 10/15/2013 11:08:24 AM)

- Select Setup from the menu bar and click Customer and Customer Maintenance.
- Make sure that the customer you want to edit is selected.
- Click the Aggregate Inventory check box on the Name tab.

Note: Once a customer is set as an aggregate inventory customer, the setting should not be changed back while there is inventory for that customer. Allow Extra Picking and Use Labels are discussed later in this chapter.

Receiving

- Select Edit from the menu bar and click Aggregate Inventory and Receive Order.



The Receive Order screen appears. The Order Header information section is at the top of the screen, the Detail section is in the middle of the screen and Received information at the bottom.


The 'Receive Order' screen is divided into three main sections: Order Header Info, Detail, and Received. The Order Header Info section contains fields for Order ID, Customer ID, Door Location, Carrier, Receipt Date, and Receipt Time (11:56 AM). It also includes buttons for 'Open Receipt', 'View Plates', and 'Receive Xfer Items'. The Detail section contains fields for Item, Lot Number, Quantity, Unit of Measure, Weight (Lbs.), Inventory Status, Inventory Class, Handling Type, Serial Number, User Item 1, User Item 2, User Item 3, Country, Expiration Date, and Manufacture Date. The Received section contains a 'Totals' tab and a 'Refresh Totals' button. The bottom of the screen features a table with columns for Quantity, UOM, Item, Lot Number, Status, Inv Status, Serial Number, and Weight.

Quantity	UOM	Item	Lot Number	Status	Inv Status	Serial Number	Weight

You can enter/select an existing inbound order or create a new order.

Creating a Receipt Order

Entering Header Information

The following is a list of fields and descriptions for the receipt order header. After you have finished entering header information, click the Open Receipt button . Once the Open Receipt button is used, the information on the detail section of the screen can be entered.

Order ID - The order ID will automatically be assigned after the Open Receipt Button is used and the first item is added.

Customer ID - This is a required field. Must be a valid customer ID for a customer set for “Aggregate Inventory” processing on the Customer/Name Screen. You can double click on this field to select a value from a list.

Door Location - This is a required field. It must be a valid Door Location in the facility. It is for informational purposes and does not assign a door for exclusive processing. The door is recorded in the inbound customer load record that will be created for this order. You can double click on this field to select a value from a list.

Carrier - This is a required field. It must be a valid carrier. The carrier is stored in the order header and inbound customer load record that will be created for this order. You can double click on this field to select a value from a list.

Receipt Date - This field is optional. If a date is not chosen, the current date is used. The receipt date is stored in the inbound customer load record that will be created for this order. Future dates are not allowed. You can use the drop down calendar to select a date.

Receipt Time - This defaults to the current time. Entry of this time allows for differentiation of inventory received on the same day for FIFO purposes.

Cust PO - This field is optional. It is stored in the order header record that will be created for this order.

Bill of Lading - This field is optional. It is stored in the order header record that will be created for this order.

Reference - This field is optional. It is stored in the order header record that will be created for this order.


Supplier - This field is optional. It is stored in the order header record that will be created for this order. The supplier must be associated with the customer. You can double click on this field to select a value from a list.

Trailer - This field is optional. It is stored in the inbound customer load record that will be created for this order.

Seal - This field is optional. It is stored in the inbound customer load record that will be created for this order.

Entering Detail Information

The following is a list of fields and descriptions for the receipt order detail. The order detail information is entered for each item received. A running total and a list of the entered items are displayed in the bottom panel of the screen.

Item - This field is required. It must be a valid item number for the customer. You can use the lookup button  or double click on this field to select a value from a list.

Lot # - This field will be open for entry if it is required.

Quantity – The quantity being received. This field is required.

Unit of Measure - This field is required. It must be a valid unit of measure for the item. You can select a value from the drop down list.

Weight - This field will be open for entry if it is required. For catch weight items only, you can enter a single weight for all of the quantity or double-click to access a sub-screen to enter multiple weights.

Inventory Status - This field is required. You can select a value from the drop down list.

Inventory Class - This field is required. You can select a value from the drop down list.

Handling Type - This field is required. You can select a value from the drop down list.

Serial # - This field will be open for entry if it is required.

User Item 1, 2, 3 - These fields will be open for entry if data is required.

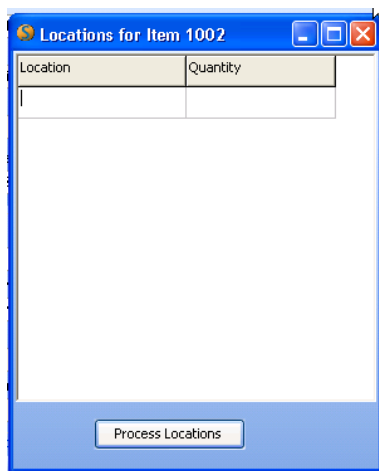
Country - This field will be open for entry if it is required.

Expiration Date - This field will be open for entry if it is required.

Manufacture Date - This field will be open for entry if it is required. You can't enter a future date.

- When you are finished entering detail information for an item, click the Enter Item

Locations button . The Locations for Item screen appears:



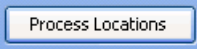
Location	Quantity

Process Locations

- Type the location where the item is going to be stored in the Location field. You can double click on the field to access the Location Lookup screen.
 - Each entry must be a valid location in the facility.
 - Door locations are not allowed.
 - You can enter multiple locations for the item.
 - The inventory created is recorded for each location entered. If a location is entered more than 1 time, multiple internal license plates are generated for the specified quantities.
- Enter the quantity that is stored in the location.

Location	Quantity
AA0101C	50
AA0101D	50

Process Locations

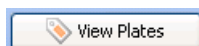
- Click the Process Locations button  to save your changes. The items appear at the bottom of the screen.

Note: If the sum of the quantity fields does not equal the quantity entered for the item when the “Process Locations” button is used, a confirmation message appears. Select Yes to accept the quantity entered or No to return and update the quantity on the Locations for Items screen.

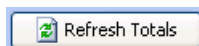
An inbound customer load will be created for the order. The normal flow of load assignment, load arrival, empty trailer notification and load close is all handled automatically (behind the scenes).

Quantity	UOM	Item	Lot #	Status	Inv Status	Serial #	We
50	CS	1001	312506101	A	AV		
100	CS	1002	31250709	A	AV		

Additional Buttons



- Allows you to view the plates that were generated internally for processing purposes. Physical license plate labeling is not required. When you click this button, the Plate Lookup screen appears.

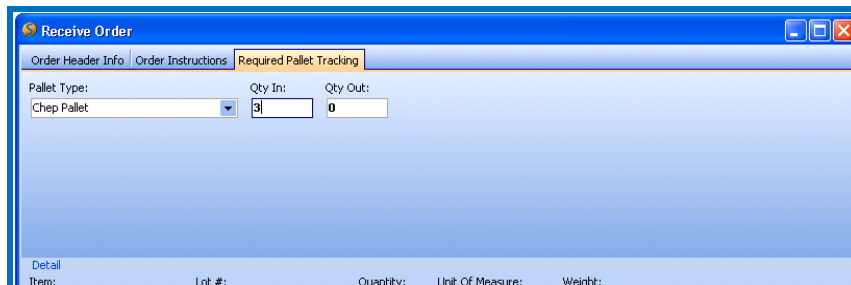


- Refreshes the quantities at bottom of the screen.

Tracking Pallets

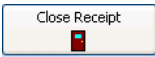
You can track the physical pallets (chep, wooden, etc.) that you receive on the order. Note: This function is available when the Tracking Pallets check box is selected on the Customer Name tab in Customer Setup.


- Select the Required Pallet Tracking tab at the top of the screen.
- Enter a Pallet type. You can use the drop down to select a value from a list.
- Enter the quantity you received in the Quantity In field.



Closing the Receipt

When you are finished adding detail information to the receipt order, you can close the receipt.

- To close the receipt, click the Close Receipt button . A confirmation window appears:

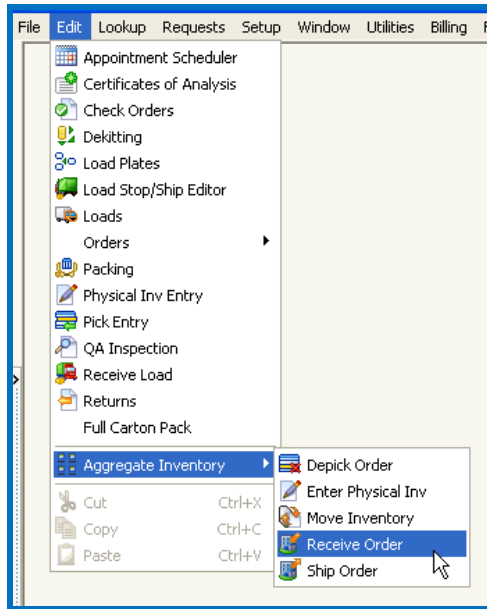



- Click Yes.

Updating a Receipt Order

You can update a receipt order after adding at least one item and prior to closing the order.

- Select Edit from the menu bar and click Aggregate Inventory and Receive Order.



- Enter the receipt in the Order ID field. You can double click in the field or use the lookup button  to access the Order Lookup screen. The information for the receipt order appears on the Receive Order Screen:

Receive Order

Order Header Info | Order Instructions | Required Pallet Tracking

Order ID: 370259 Customer ID: AGCALJAM Door Location: DR45 Carrier: ABF Receipt Date: 10/16/2013 Receipt Time: 08:49 AM

Cust PO: P08658669 Bill of Lading: BL-58458 Reference: 5875859

Supplier: Trailer: 9559 Seal:

Trailer Temperatures
Nose: Middle: Tail:

Close Receipt
View Plates
Receive Xfer Items

Detail

Item: Lot #: Quantity: Unit Of Measure: Weight: Lbs.

Inventory Status: Inventory Class: Handling Type: Serial #:

User 1: User 2: User 3: Country:

Expiration Date: Manufacture Date: Enter Item Locations

Received

Totals | Order Item Instructions

Total Quantity: 200 Total Weight: 2000 Lbs. Refresh Totals

Quantity	UOM	Item	Lot #	Status	Inv Status	Serial #	Weight
200	CS	1002	32890808	A	AV		

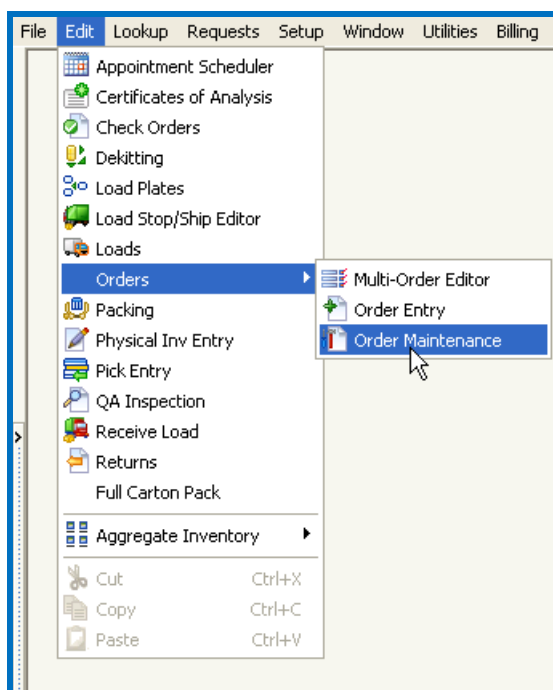
- You can add items to the receipt. You can also update pallet tracking information. See the *Entering Detail Information* and *Tracking Pallets* sections above.


Outbound Processing

Entering an Outbound Order

The order is entered using the normal non-aggregate inventory process. The customer must be setup for Aggregate Inventory on the Setup/Customer/Name screen. To enter an order:

- Select Edit from the menu bar and click Orders and Order Maintenance.



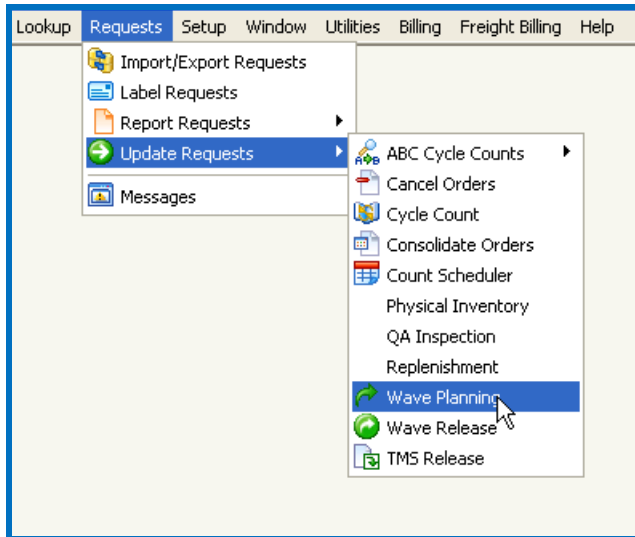
- The Order screen appears. You can enter/select an order to update or click the insert record button  to create a new order.

See the chapters on *Order Processing* for more information about maintaining orders.

Planning the Wave

Wave Planning is done using the normal non-aggregate inventory process. For aggregate inventory orders:

- Multiple orders can be in a wave.
- Mixed aggregate and non-aggregate inventory customer orders cannot be released in the same wave.
- The pick type for the wave must be ORDR on the Wave Planning Options Tab.
- Select Requests from the menu bar. Select Update Requests and Wave Planning.



The Wave Planning Order Select screen appears. See the chapters on *Wave Management* for more information.

The screenshot displays the 'Wave Planning Order Select for Facility ZET' window. The window has a title bar and a menu bar with options: Criteria - 1, Criteria - 2, Where Clause, Results, Options, and Auto Release. The main area contains various search criteria and filters:

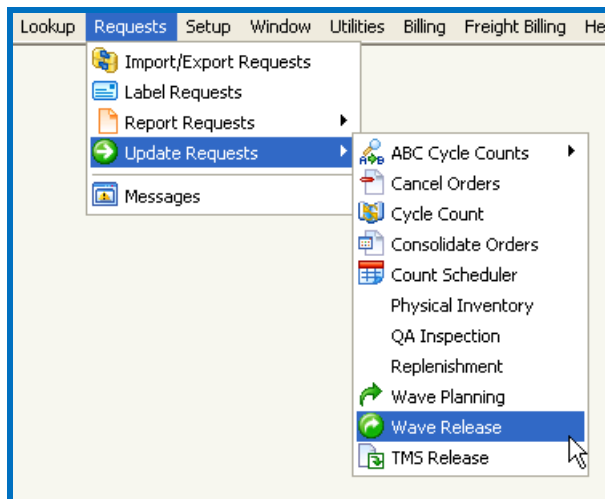
- Description:** 1-All
- Customer ID:** AGCALJAM
- Scheduled Ship Dates From:** (All) (Current Date +/- -999 Days)
- Scheduled Ship Dates To:** (All) (Current Date +/- 999 Days)
- State/Province:** (All) (Current Date +/- -999 Days)
- Appointment Dates From:** (All) (Current Date +/- -999 Days)
- Appointment Dates To:** (All) (Current Date +/- 999 Days)
- Carrier:** (Empty)
- Item:** (Empty)
- Load:** (Empty)
- MaxTotal Quantity:** 0
- Delivery Service Code:** (Empty)
- Order ID:** (Empty)
- Order Type:** Include (selected), Exclude
- Order Priority:** Include (selected), Exclude
- Product Group:** Include (selected), Exclude
- Shipment Type:** Include (selected), Exclude
- From Lot Number:** (Empty)
- To Lot Number:** (Empty)
- Single SKU Only:** (unchecked)
- Active Line-Item Count:** From: (Empty) To: (Empty)

At the bottom, there are buttons for 'Process' and 'Commit...'. Below these buttons are status indicators: 'Hold Ship Short' (green), 'Excluded Included' (yellow), and 'Hazardous HOT' (red). The footer text reads: 'Facility ZET (Last Update by ANN at 10/11/2013 10:59:53 AM)'.

Wave Release and Task Generation

Wave Release is done using the normal non-aggregate inventory process. For aggregate inventory orders:

- You do not get wave screen control back until all pick tasks have been created by the background task that generates the picks (genpicks). The system waits for genpicks to finish so that "like" picks (i.e. same customer, item, lot, uom and location) can be combined and the data is available for printing the pick list and preliminary Bill of Lading (BOL). Note: If the pick list or preliminary BOL needs to be reprinted, use the Report Request feature.
- All tasks are created with priority 9 (On Hold).
- The pick type for the wave must be ORDR on the Wave Planning Options Tab.
- A pick list for each order in the wave is printed automatically. See the *Outbound Pick List Report* section later in this chapter for more information about the report.
- Labels will print if they are setup to print at wave release for the customer.
- Select Requests from the menu bar. Select Update Requests and Wave Release.



The Wave Maintenance screen appears.

Wave 213165 Maintenance for Facility ZET

Waves Orders Labor Options Flex Pick Fronts

Wave: 213165 Description: 1-All Status: Committed

Order Count: 1 Labor: 01:30 % Complete: 0

Quantity Weight Cube

Ordered: 200 2,000.00 200.00

Committed: 200 2,000.00 200.00

Scheduled Release: Ready...

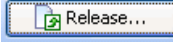
☒ Active Waves Only ☒ Print Shipping Labels at Release

☐ Trace this request Undo Routing

Wave Status	Wave	Scheduled Release	Order Count	Order Qty.	Commit Qty.	Order Weight	Commit Weight	Order Cube	Commit Cube	Lab
Committed	213165		1	200	200	2000	2000	200	200	
Committed	213157		4	189	189	945	270	109.375	34.3283	
Committed	213132		3	6	6	30	30	3.5727	3.5727	
Committed	213118		1	60	60	120	120	9.1798	9.1798	
Committed	213116		1	30	30	30	30	1.7709	1.7709	
Committed	213115		1	120	120	120	120	7.0833	7.0833	
Committed	213114		1	150	150	150	150	8.8541	8.8541	
Committed	213113		1	700	700	700	700	52.0833	52.0833	
Committed	213112		1	2500	2500	2500	2500	174.4792	174.4792	
Committed	213111		1	2000	2000	2000	2000	171.875	171.875	
Committed	213101		1	60	60	60	60	34.7222	34.7222	
Committed	213069		1	1	1	12	12	2	2	
Committed	213068		1	1	1	12	12	2	2	
Committed	213067		1	4	0	15	0	0.9736	0	
Committed	213053		1	30	30	360	360	60	60	
Committed	213019		1	12	8	48	28	8.8889	2.8889	
Committed	213001		9	1036	770	1152	886	26.0974	22.1287	

Release... Uncommit All Unrelease All Replan Waves Reprint Pick Lists Excluded Included Hazardous Shortage

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- Select the wave you want to release and click the Release button . A confirmation window appears. Click Yes to continue.
- A Print window appears. Select the printer that you want to use to print the pick lists and click OK.

Print

Printer

Name: Lexmark XM5100 Series XL (from ZETHCON) Properties...

Status: Ready

Type: Lexmark Universal v2 XL

Where: TS001

Comment:

Print range

☒ All

☐ Pages from: 1 to:

☐ Selection

Copies

Number of copies: 1


☒ Collate

OK Cancel

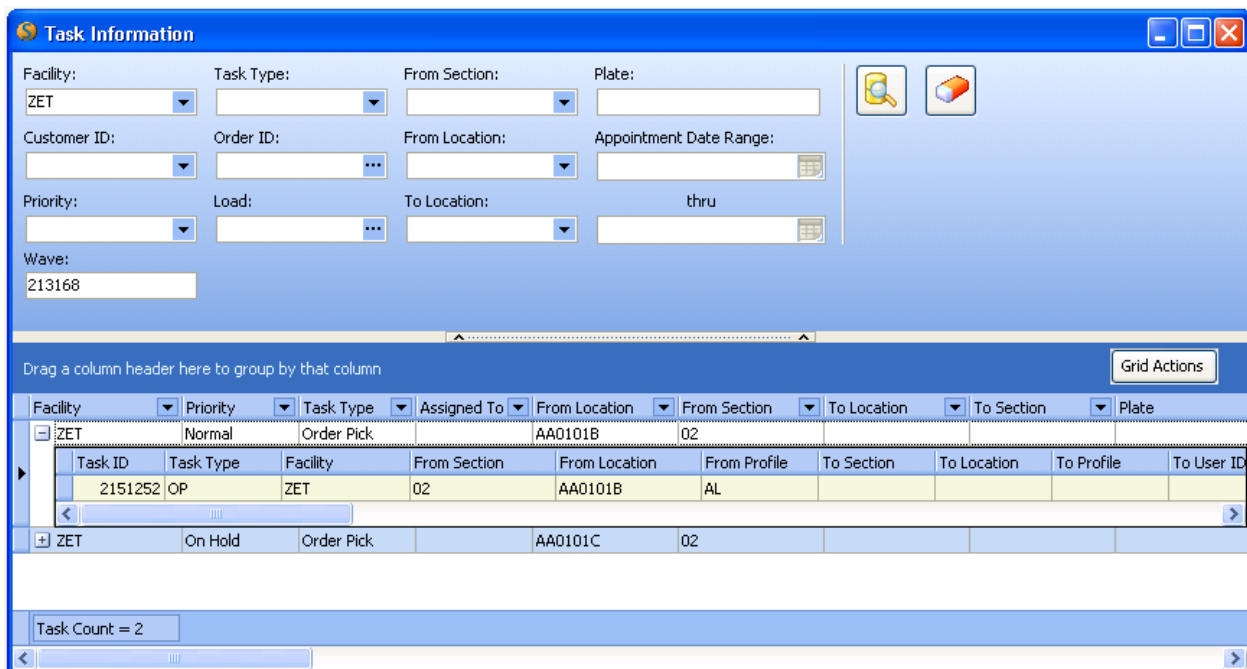
Note: If labels are set up for the customer, a window appears so that you can enter the number of labels required.

See the *Wave Management* chapter for more information about waves.

The tasks for the wave appear on the Task screen.

- Select Lookup from the menu bar and click Tasks. The Task Information screen appears.
- Enter the wave number. Click the process button .

Note: You can click  next to the task to see the detail task information.



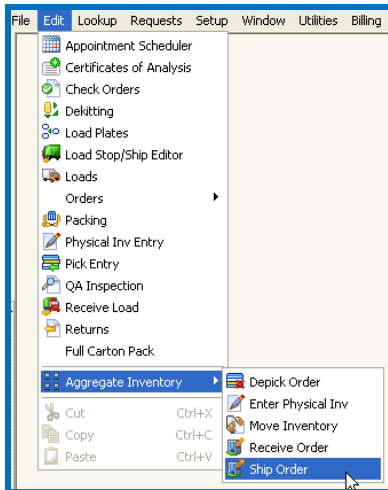
The screenshot shows the 'Task Information' window. It contains several input fields for filtering tasks: Facility (ZET), Task Type, From Section, Plate, Customer ID, Order ID, From Location, Appointment Date Range, Priority, Load, To Location, and Wave (213168). Below these fields is a table with columns: Facility, Priority, Task Type, Assigned To, From Location, From Section, To Location, To Section, and Plate. The table shows two tasks. The first task is expanded, showing a sub-table with columns: Task ID, Task Type, Facility, From Section, From Location, From Profile, To Section, To Location, To Profile, and To User ID. The sub-table shows one task with Task ID 2151252, Task Type OP, Facility ZET, From Section 02, and From Location AA0101B. The second task in the main table is ZET, On Hold, Order Pick, AA0101C, 02. At the bottom, there is a 'Task Count = 2' label.

Facility	Priority	Task Type	Assigned To	From Location	From Section	To Location	To Section	Plate																				
ZET	Normal	Order Pick		AA0101B	02																							
<table border="1"> <thead> <tr> <th>Task ID</th> <th>Task Type</th> <th>Facility</th> <th>From Section</th> <th>From Location</th> <th>From Profile</th> <th>To Section</th> <th>To Location</th> <th>To Profile</th> <th>To User ID</th> </tr> </thead> <tbody> <tr> <td>2151252</td> <td>OP</td> <td>ZET</td> <td>02</td> <td>AA0101B</td> <td>AL</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>									Task ID	Task Type	Facility	From Section	From Location	From Profile	To Section	To Location	To Profile	To User ID	2151252	OP	ZET	02	AA0101B	AL				
Task ID	Task Type	Facility	From Section	From Location	From Profile	To Section	To Location	To Profile	To User ID																			
2151252	OP	ZET	02	AA0101B	AL																							
ZET	On Hold	Order Pick		AA0101C	02																							

Task Count = 2


Picking, Staging and Loading the Order

- Select Edit from the menu bar and click Aggregate Inventory and Ship Order.



The Ship Order screen displays.

The screenshot shows the 'Ship Order' screen. It has a blue header bar with the title 'Ship Order'. Below the header, there are several input fields and buttons. On the left, there is an 'Order ID' field with a lookup button (magnifying glass icon) and a 'Total to Pick' field. In the center, there is a 'Stage Location' field with a 'Pick' button and a 'Print Labels' button. On the right, there are fields for 'Door Location', 'Carrier', 'Bill of Lading', 'Trailer', 'Seal', 'Actual Ship Date' (pre-filled with '10/16/2013'), and 'Pro Number'. There is also a 'Pick & Ship' button. Below these fields, there is a section for 'Trailer Temperatures' with 'Nose', 'Middle', and 'Tail' fields. At the bottom, there is a table titled 'Item Details' with columns: 'Line #', 'Item', 'Receipt', 'Location', 'Quantity', 'Base UQM', and 'Itemate UQM'. The table is currently empty.

- Enter an Order ID. You can double click on the Order ID field or use the lookup button  to access the Order Lookup screen and select an order.

Ship Order

Header

Order ID: **370261**

Released

Total to Pick: **140**

Stage Location:

Pick

Print Labels

Trailer Temperatures

Nose: Middle: Tail:

Door Location:

Carrier: **ABF**

Bill of Lading:

Trailer:

Seal:

Actual Ship Date: **10/16/2013**

Pro Number:

Pick & Ship

Item Details

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	ternate UOM
1	1001	312506101	370258	AA0101B	40	CS	(2 Pallet)
2	1002	31250709	370258	AA0101C	50	CS	(2 Pallet, 10
3	1002	31250709	370258	AA0101D	50	CS	(2 Pallet, 10
4							(N/A)

Required Pallet Tracking

Pallet Type:

Qty In: **0** Qty Out: **0**

The status of the order appears below the Order ID. The screen fields allow or disallow entry based upon the order status.

You can *Pick* or *Pick and Ship* the order:

- **Pick** – Picks the inventory listed on the Ship Order screen automatically. A Stage Location entry is required. After you perform the Pick process, the Ship process can be performed.
- **Pick and Ship** – Picks and ships the inventory listed on the Ship Order screen automatically in one step. Documents are printed similar to load close. The following fields are required:

Stage Location Door Location
Carrier Trailer
Actual Ship Date

Note: The required pro number entry is not enforced for this type of shipping.

Pick

You can pick the order and stage it without shipping it. You will then need to perform the Ship process separately. To Pick the order:

- Enter a staging location in the Stage Location field. Double click to select one from a list. This field is required to perform the Pick process.

Ship Order

Header

Order ID: **370265**

Released

Total to Pick: **140**

Stage Location:

Pick

Print Labels

Trailer Temperatures

Nose: Middle: Tail:

Door Location:

Carrier: **ABF**

Bill of Lading:

Trailer:

Seal:

Actual Ship Date: **10/16/2013**

Pro Number:

Pick & Ship

Item Details

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Alternate UOM
1	1001	312506101	370258	AA0101B	20	CS	(2 Pallet)
2	1002	32890808	370259	AA0102A	100	CS	(5 Pallet)
3							(N/A)

Required Pallet Tracking

Pallet Type:

Qty In: Qty Out:

If you pick less than the quantity entered on the order, you can decrease the quantity in the Item Details. A quantity cannot exceed the ordered quantity or be negative. It can be zero.

You can change the pick Location in the Item Detail section. Note: The Receipt number must also be changed to match what is in the updated location.

- Click Pick. A confirmation window appears. (If the order has been picked short, the confirmation window displays a warning.)

Confirm

Order has been picked short. Okay to pick order 370265?

- Click Yes. The items are picked, the order status changes to Picking Complete and the Ship button Ship appears.

Header

Order ID: 370265

Picking Complete

Total Picked: 80

Stage Location: STG17

Door Location:

Carrier: ABF

Bill of Lading:

Trailer:

Seal:

Actual Ship Date: 10/16/2013

Pro Number:

Trailer Temperatures

Nose: Middle: Tail:

Item Details

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Item UOM
1	1001	312506101	370258	STG17	20	CS	(1 Pallet)
2	1002	32890808	370259	STG17	60	CS	(3 Pallet)

Required Pallet Tracking

Pallet Type: Qty In: 0 Qty Out: 0

To Ship the order:

- Enter the Door Location, Carrier, Trailer, and the Actual Ship Date.

Note: The Actual Ship Date can be back dated to the 1st day of the previous month. Postdating is not allowed.

- If your facility is tracking pallets for this customer, then enter the Pallet Type and the Qty Out.

- Click . A confirmation window appears:

Confirm

Okay to Ship Order 370265?

Yes No

- Click Yes to ship the order. A Print window appears. Select the printer where the load close documents should print.

The order is shipped and the status changes to Shipped. A Load is automatically created and closed. The order that you created is closed.

Ship Order

Header

Order ID: **370265**

Shipped

Total Shipped: **80**

Stage Location: **TR9871**

Door Location: **DR44**

Carrier: **ABF**

Bill of Lading: **BL5740202**

Trailer: **TR9871**

Seal:

Actual Ship Date: **10/16/2013**

Pro Number:

Trailer Temperatures

Nose: **0** Middle: **0** Tail: **0**

Item Details

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Alternate UOM
1	1001	312506101	370258	TR9871	20	CS	(1 Pallet)
2	1002	32890808	370259	TR9871	60	CS	(3 Pallet)

Required Pallet Tracking

Pallet Type: **Wooden Pallet** Qty In: **0** Qty Out: **4**

Pick and Ship

You can pick and ship the order in one step:

- Enter the Stage Location, Door Location, Carrier, Trailer, and the Actual Ship Date. Required pro number entry is not enforced for this type of shipping.

Note: The Actual Ship Date can be back dated to the 1st day of the previous month. Postdating is not allowed.

- If you pick less than the quantity entered on the order, you can decrease the quantity in the Item Details. A quantity cannot exceed the ordered quantity or be negative. It can be zero.

You can change the pick Location in the Item Detail section. Note: The Receipt number must also be changed to match what is in the updated location.

- If your facility is tracking pallets for this customer, then enter the Pallet Type and the Qty Out.

Ship Order

Header

Order ID: **370266**

Released

Total to Pick: **40**

Stage Location: **STG15**

Pick

Print Labels

Trailer Temperatures

Nose: Middle: Tail:

Door Location: **DR44**

Carrier: **ABF**

Bill of Lading: **BL05786960**

Trailer: **TR8767**

Seal:

Actual Ship Date: **10/16/2013**

Pro Number:

Pick & Ship

Item Details

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	ternate UOM
1	1002	32890808	370259	AA0102A	40	CS	(2 Pallet)
2							(N/A)

Required Pallet Tracking

Pallet Type: **Chep Pallet**

Qty In: **0**

Qty Out: **2**

- Click **Pick & Ship**. A confirmation window appears:

Confirm

Okay to Pick & Ship Order 370266?

Yes **No**

- Click Yes to pick and ship the order. A Print window appears. Select the printer where the load close documents should print.

The order is shipped and the status changes to Shipped. A Load is automatically created and closed. The order that you created is closed.

Ship Order

Header

Order ID: **370266**

Shipped

Total Shipped: **40**

Stage Location: **TR8767**

Door Location: **DR44**

Carrier: **ABF**

Bill of Lading: **BL05786960**

Trailer: **TR8767**

Seal:

Actual Ship Date: **10/16/2013**

Pro Number:

Trailer Temperatures

Nose: **0** Middle: **0** Tail: **0**

Item Details

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Alternate UOM
1	1002	32890808	370259	TR8767	40	CS	(2 Pallet)

Required Pallet Tracking

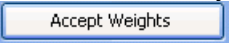
Pallet Type: **Chep Pallet** Qty In: **0** Qty Out: **2**

Picking Options

Picking Catch Weights

If an item(s) has been setup as a catch weight item on the outbound, the weight field can be changed to allow the entry of the actual weights.

You can:

- Enter one weight for all of the quantity being picked in the grid in the Item Detail section of the screen
- Double-click in the weight field to access a sub-screen to enter multiple plates. You can continue to add each entry until complete, pressing Tab after each entry. Click Accept Weights .

The screenshot shows the 'Ship Order' application window. The 'Header' section contains fields for Order ID (370268), Stage Location (STG15), Door Location (DR44), Carrier (ABF), Bill of Lading, Seal, Pro Number, and Trailer Temperatures (Nose, Middle, Tail). A 'Released' status is shown with 'Total to Pick' at 0. A 'Pick' button and a 'Print Labels' button are visible. The 'Item Details' table has one row: Line # 2, Item FROGS, Lot Number 1017, Receipt 370267, Location AA0105B, Quantity 25, Base UO. The 'Required Pallet Tracking' section has a 'Pallet Type' dropdown and 'Qty In'/'Qty Out' fields, both set to 0. A 'Weight Entry' dialog box is open on the right, showing 'Gross Weight' as 25.5 and 'Total Pounds' as 25.5, with an 'Accept Weights' button.


Line #	Item	Lot Number	Receipt	Location	Quantity	Base UO
2	FROGS	1017	370267	AA0105B	25	LBS

Allow Extra Picking

If, at the time of wave release, there were no tasks generated for an item but it is on the order, you can add the pick entry in the blank row at the bottom of the grid area on the Ship Order screen. This entry does not require you to regenerate picks or unrelease and re-release the order. If the entry is for an item on the order and the quantity does not exceed the ordered quantity, the entry will be accepted and picked/shipped.

Customer Setup

The Allow Extra Picking box must be checked on the Customer Name tab to allow you to use this feature.

- Select Setup from the menu bar and then Customer and Customer Maintenance.
- Make sure you have the customer you want to update selected and click the Allow Extra Picking box.
- Click the save changes button .

Customer AGCALJAM-Aggregate California Distribution

Name: **AGCALJAM** Status: **Active**

Phone: **902-575-668** Consumables Owner:

Lookup: **AGGREGATE CALIFORNIA DISTRIBUTION**

Contact: **Arnold Fink**

Address: **98765 American Way**

City: **Liberty** State/Province: **CA**

Postal Code: **99942** Country: **USA**

Master Account: Recent Order Days: Min 0-Qty Weight:

Additional Contacts:

Customer Logo: Default Order Attachment Directory:

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Options:

☐ Use Expanded WebSynapse fields

☐ Suppress Anniversary Date

☒ Aggregate Inventory

☐ Use Labels

☒ Allow Extra Picking

☐ Allow Load Assignment

☐ Require Cycle Count Item

☒ Require Cycle Count Lot

☐ Require Physical Inventory Item

☒ Require Physical Inventory Lot

Adding the item to the Ship Order

- On the Ship Order screen, type the Item, Lot Number (if applicable), Receipt, Location, Quantity, and Base UOM in the open line in the Items Detail section of the screen.

Ship Order

Header:

 Order ID: **370268**

 Released:

 Total to Pick: **0**

Stage Location: **STG15**

 Door Location: **DR44**

 Carrier: **ABF**

Bill of Lading:

 Seal:

 Pro Number:

Trailer: **TR55858**

 Actual Ship Date: **10/17/2013**

Print Labels

 Pick & Ship

Trailer Temperatures:

 Nose: Middle: Tail:

Item Details:

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Weight - Lbs.	ternate UOM
2	FROGS	1017	370267	AA0105B	25	LBS		(N/A)

Required Pallet Tracking:

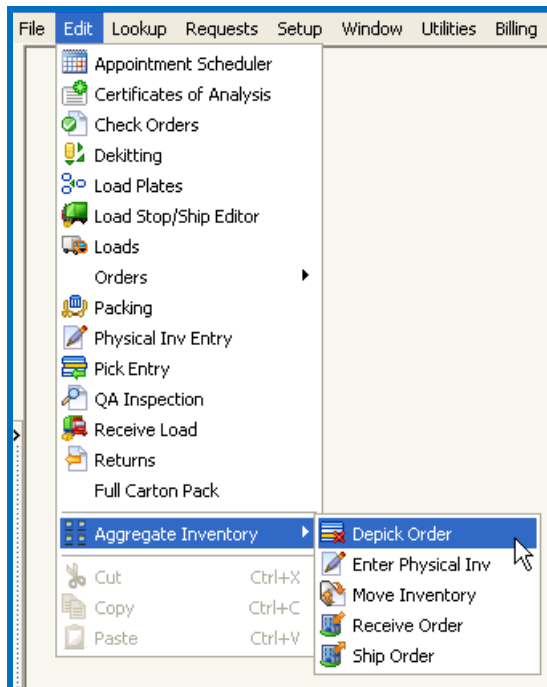
 Pallet Type: Qty In: Qty Out:

- Click the Pick or Pick and Ship button to either complete the picking process or perform a one-step pick and ship.

Depicking an Aggregate Inventory Order

If you need to de-pick an aggregate inventory order you can use the Depick Order screen. The order must be in Picked status to be available for Depick. You can depick all or part of an order.

- Select Edit from the menu bar and click Aggregate Inventory and Depick Order.



The Depick Order screen appears.

- Type an Order ID and press Enter. You can double click in the Order ID field or use the lookup button to access the Order Look-up screen to select an order from a list.

The line items display in the bottom grid. The first line item appears in the Depick Detail section of the screen.

Depick Order

Order ID: **370261** Picking Complete Customer ID: **AGCALJAM**

Depick Detail

Item: **1002** Lot #: **31250709** Receipt: Quantity: **50** Unit Of Measure: **CS - Case** Enter Item Locations

Item	Lot #	Status	Receipt	Location	Quantity	UOM	Pick Quantity	Pick UOM	UC
▶ 1002	31250709	Staged		STG15	50	CS	50	CS	
1002	31250709	Staged		STG15	50	CS	50	CS	
1001	312506101	Staged	370258	STG15	40	CS	2	PLT	

- Click on the line that you want to depick and click the Enter Item Locations button

Enter Item Locations. The Locations for Item screen appears:

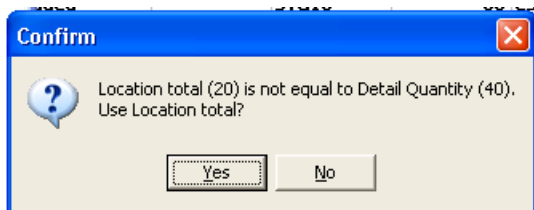
Locations for Item 1001

Location	Quantity

Process Locations

- Enter the location the product is being returned to. More than one location can be entered for each item. Click **Process Locations**.

If the quantity you depicked does not match the quantity picked, a confirmation message to verify your entry appears:



Click Yes.

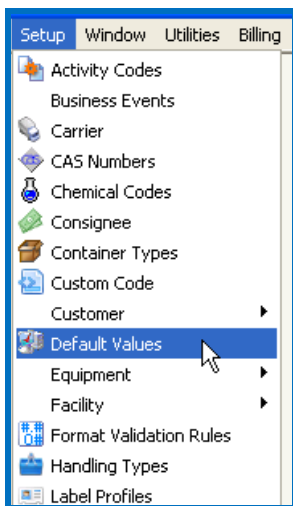
- Continue to depick the quantities required.

Defining the Outbound Pick List Report

Default Values Table

The value “PICKLISTREPORT” is in the Default Values Table to identify the path and name of the Crystal Report that is used to generate the Pick List. This needs to be setup prior to processing any outbound orders.

- Select Setup from the menu bar and click Default Values.



The Default Values screen appears:


Default Values

Parameter: PICKLISTREPORT

Value: \\PaperPicking\AggrInv_Pick(ZPAPAGPCKTK).rpt



Parameter	Value	Last User	Last Update
MULTISHIPBUTTON	Y	ZETHCON	8/6/2012 1:26:14 PM
ORDERBILLTAB	Y	SWINCHELL	3/23/2012 4:53:54 PM
ORDERCHECKREPORT	\\OrderChecking\\ord_check(ZORDRCHK).rpt	SWINCHELL	3/17/2010 9:28:50 AM
ORDERPRIORITYCOLOR	Y	SWINCHELL	5/10/2012 1:09:26 PM
ORDER_GROUPING_PROC_PREFIX	GROUP_BY_	SUP	1/24/2012 1:53:42 PM
PACKINGLISTFIELD		SUP	6/8/2013 7:24:07 PM
PACKINGPRINTERDISPLAY	Y	SWINCHELL	12/7/2011 4:03:53 PM
PACKLISTREPORT	\\Shipping\\packlist_by_sku(ZSHPPCKLSTSKU).rpt	SWINCHELL	3/17/2010 9:54:16 AM
PALLETSUOM	PLT	SUP	5/29/2012 4:00:36 AM
PAPERPICKLISTREPORT	\\PaperPicking\\pickticket(ZPAPPCKTKT).rpt	SWINCHELL	3/17/2010 9:54:30 AM
PDFBOLPATH	F:\\Synapse2\\qa 2.5\\PDFBOL	ZETHCON	4/20/2012 4:43:08 PM
PHYSICALINVENTORYREPORT	\\PhysicalInventory\\Phy_inv_ticket(ZPIINVTKT).rpt	SWINCHELL	3/17/2010 9:54:50 AM
PICKFROMCHILDPLATES	N	SWINCHELL	11/22/2011 8:15:14 AM
PICKLISTREPORT	\\PaperPicking\\AggrInv_Pick(ZPAPAGPCKTK).rpt	SWINCHELL	3/17/2010 9:55:21 AM
PICKTYPELABEL	N	SUP	6/8/2013 7:24:10 PM
POCONFIRMATIONREPORT	\\Receiving\\PO_Confirmation(ZRECPOCNFMNLNG).rpt	SWINCHELL	3/17/2010 9:55:34 AM
PURGEAUTOUNLOCK	NO	SYSTEM	1/1/2000
PDFBOLCOMMITMENT	RN	SYSTEM	8/6/2010 5:24:01 PM

LINUX2TEST Facility ZET (Last Update by SWINCHELL at 3/17/2010 9:55:21 AM)

- Use the scroll bar to scroll through the parameters to locate PICKLISTREPORT.
- If you need to maintain the value, update the value in the Value field at the top of the screen.
- Click the save changes button  to save your changes.

Customer Specific Setup

If a different report is required for a specific customer, the report can be identified in Customer Setup.

- Select Setup from the menu bar and choose the Customer and Customer Maintenance options. The Customer Setup screen appears.
- Make sure the customer you want to edit is selected.
- Select the Shipping tab and then the Options – 4 tab.
- You can maintain the report format in the Aggregate Inventory Picking List Report Format field. Double click in the field or click the ellipsis button  to select a report from a file folder.
- Click the save changes button  to save your changes.

Customer AGCALJAM - Aggregate California Distribution

Options - 1 Options - 2 Options - 3 Options - 4 Options - 5 Instructions Comments Pack List Audit Locations Carriers Notification SIP TMS Custom BOL # Carri

Aggregate Inventory Picking List Report Format:
 I:\PaperPicking\AggrInv_Pick_alt(ZPAPAGPCKTKA).rpt

E-mails

Customer Email on Shipment Close
 Consignee- Small Package Consignee- Non-Small Package

☐ Small Package E-mail

From Address:
 E-mail Body:

☐ Allow Direct Release of Orders
☐ Allow Manual Selection of Picks
☐ Restrict to Partial Pick Types

Grouping Procedure for Wave Planning

Customer Weight Limits
☐ Warn on Overweight Orders
 Order Weight Limit:
☐ Warn on Overweight Loads
 Load Weight Limit:

Freight Billing Control
 Freight Billing Interface
 Order Header Field that controls Freight Billing Interface
 Value that controls Freight Billing Interface

Customer/Facility Email Addresses

Facility	Email Address	Last User

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Sample Report

Aggregate Inventory Pick Ticket
 Zethcon Test
 Printed on 10/17/2013 10:48AM

Order: 370261-1
 Task: 2151252
 Wave: 213168

Facility: ZET Zethcon Corporation
Cust: AGCALJAM Aggregate California Distribution
Reference: REF3424
P.O.: PO8475
Carrier: ABF
Entry Date: 10/16/2013 10:15:14

Ship To: MUTCHLER
 RD 189, KM 3.3


Ships: GURABO RI 00778
 PRI

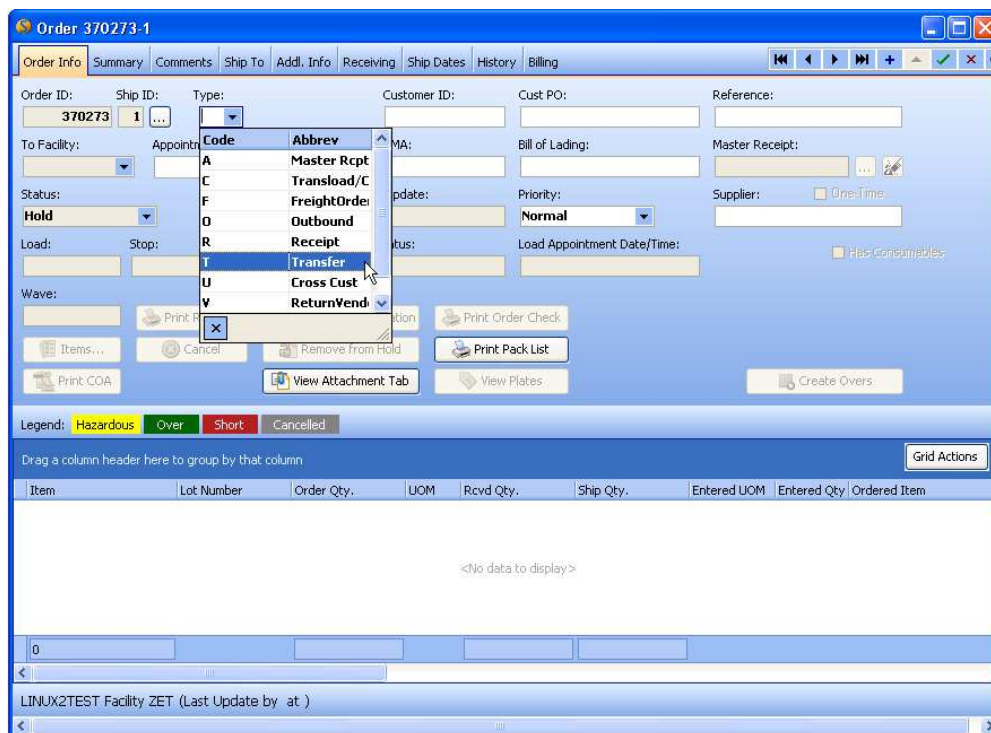
Item	Item Description	Location	Receipt	Base Qty	Base UOM	Pick Qty	Pick UOM	LOT
1001	Divination Crystal Orb	STG15	370258	20	CS	20	CS	312506101
1002	Potions Cauldron	STG15		50	CS	50	CS	31250709
1002	Potions Cauldron	STG15		50	CS	50	CS	31250709

Transfer Orders

Order Entry

To process a Transfer:

- Log into the Facility that the product is to be shipped from.
- Select Edit from the menu bar and Orders and Order Maintenance. The Order screen appears.
- Click the insert record button . Select T – Transfer as the order type.



Order 370273-1

Order ID: 370273 Ship ID: 1 Type: [Dropdown] Customer ID: Cust PO: Reference:

To Facility: Appointment: Code Abbrev

Status: Hold Load: Stop: T Transfer

Wave: [Dropdown] [Print] [Cancel] [Remove from Hold] [Print Order Check] [Print Pack List] [Print COA] [View Attachment Tab] [View Plates] [Create Overs]

Legend: Hazardous Over Short Cancelled

Drag a column header here to group by that column

Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Ordered Item
<No data to display>								

0

LINUX2TEST Facility ZET (Last Update by at)

- Fill in the remainder of the order header information as needed.

Required Fields:

- Customer ID
- To Facility – This is the ship-to facility.
- Ship-to

Order 370276-1

Order Info Shipping Summary Comments Ship To Addl. Info Transportation Ship Dates History Billing

Order ID: 370276 Ship ID: 1 Type: T Customer ID: AGCALJAM Cust PO: P01928 Reference: REF# 9

To Facility: DMJ Appointment Date/Time: 10/21/2013 RMA: Bill of Lading: BL09876

Status: Hold Status by: ANN Status Update: Priority: Normal Shipper: One-Time

Load: Stop: Shipment: Load Status: Load Appointment Date/Time: Has Consumables

Wave: Print Receiver Reprint PO Confirmation Print Order Check

Items... Cancel Remove from Hold Print Pack List

Print COA View Attachment Tab View Plates Create Overs

Legend: Hazardous Over Short Cancelled

Drag a column header here to group by that column

Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Ordered Item
<No data to display>								

LINUX2TEST Facility ZET (Last Update by at)

- Click the save changes button . The Plate Lookup screen appears:

Plate Lookup

License Plate: Facility: ZET Lot Number: Location: Expires by:

Customer ID: AGCALJAM QC Control ID: Serial Number: To Location: Status Update:

Item: Inventory Class: Receipt Order ID: Inbound Load:

Plate Status: Inventory Status: Product Group: User 1

Legend: QC Hold In Transit Deleted



Adjustment Reason: Enter Adjustment Reason Customer Reference: * represents Clickable column header for lookup

Master Pallet Label	License Plate	Customer *	Item *	Item Description	Quantity	Inv. Status *	Facility	Location *	LIP Status
<No data to display>									

Drag a column header here to group by that column

Master Pallet Label License Plate Customer Item Item Description Quantity Inv. Status Facility Location LIP Status

Selecting Stock and Generating Picks

- On the Plate Look-up, enter criteria for the inventory you want to transfer. You can double click on the fields, click the ellipsis buttons  or use the drop downs to select values from a look-up screen or list.
- Click the process button . The plates in inventory that meet the filter criteria appear on the screen.

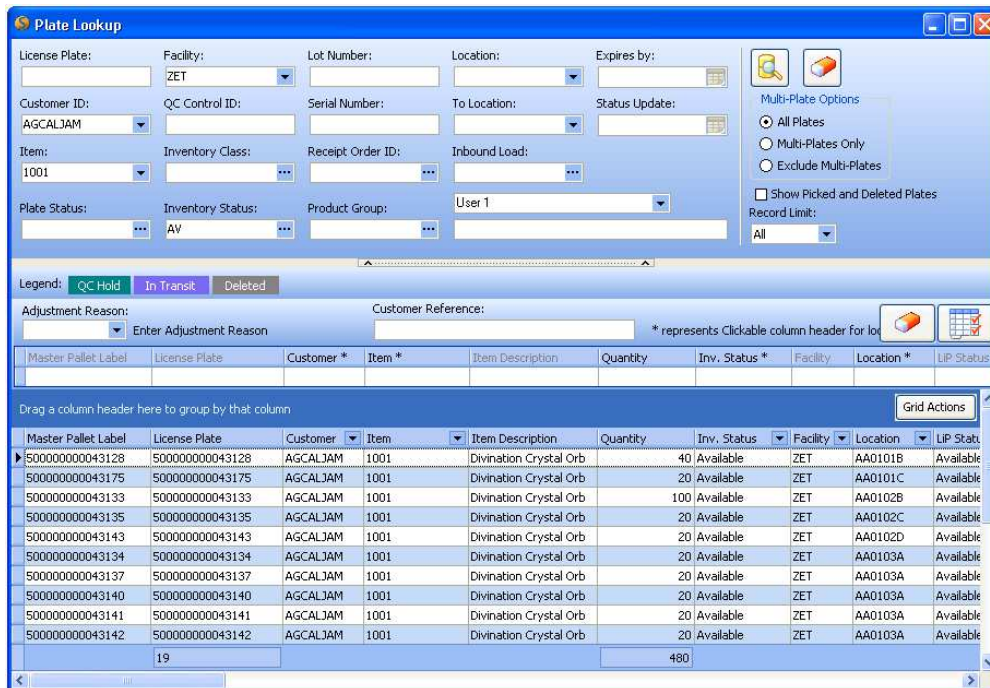


Plate Lookup

License Plate: Facility: Lot Number: Location: Expires by:

Customer ID: QC Control ID: Serial Number: To Location: Status Update:

Item: Inventory Class: Receipt Order ID: Inbound Load:

Plate Status: Inventory Status: Product Group: User 1:

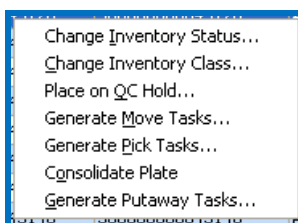
Multi-Plate Options:
☒ All Plates
☐ Multi-Plates Only
☐ Exclude Multi-Plates
☐ Show Picked and Deleted Plates
 Record Limit:

Legend: QC Hold In Transk Deleted

Adjustment Reason: Customer Reference: * represents Clickable column header for look-up

Master Pallet Label	License Plate	Customer *	Item *	Item Description	Quantity	Inv. Status *	Facility	Location *	LiP Status
500000000043128	500000000043128	AGCALJAM	1001	Divination Crystal Orb	40	Available	ZET	AA0101B	Available
500000000043175	500000000043175	AGCALJAM	1001	Divination Crystal Orb	20	Available	ZET	AA0101C	Available
500000000043133	500000000043133	AGCALJAM	1001	Divination Crystal Orb	100	Available	ZET	AA0102B	Available
500000000043135	500000000043135	AGCALJAM	1001	Divination Crystal Orb	20	Available	ZET	AA0102C	Available
500000000043143	500000000043143	AGCALJAM	1001	Divination Crystal Orb	20	Available	ZET	AA0102D	Available
500000000043134	500000000043134	AGCALJAM	1001	Divination Crystal Orb	20	Available	ZET	AA0103A	Available
500000000043137	500000000043137	AGCALJAM	1001	Divination Crystal Orb	20	Available	ZET	AA0103A	Available
500000000043140	500000000043140	AGCALJAM	1001	Divination Crystal Orb	20	Available	ZET	AA0103A	Available
500000000043141	500000000043141	AGCALJAM	1001	Divination Crystal Orb	20	Available	ZET	AA0103A	Available
500000000043142	500000000043142	AGCALJAM	1001	Divination Crystal Orb	20	Available	ZET	AA0103A	Available
19					480				

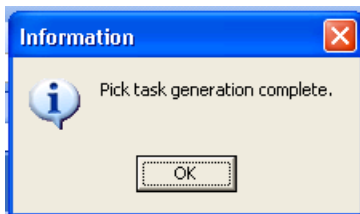
- To select a plate to ship, click on the plate in the grid.
- Right click to display the Options window. Select the Generate Pick Tasks option.



- A Pick-by-Plate Task pop-up window appears to confirm the Task Priority and Order ID. You can update the fields, if required.



- Enter a Staging Location for the product. This is a required field.
- Click OK. An information window appears confirming the pick task has been created. Click OK.



Note: The entire LP quantity will be selected to transfer. You will NOT be able to make any changes (this includes, but is not limited to, short picks and LP substitutions). If the quantity of product on an Aggregate Inventory LP is more than what you want to ship, then you will have to perform a Move Inventory function to split the quantity to the correct amount before generating a pick task.

- Continue selecting LPs and generating tasks until your transfer is complete.

The order is updated with the item and quantity information and the order status changes to Released.

Order 370276-1 for Customer AGCALJAM

Order Info Shipping Summary Comments Ship To Addl. Info Transportation Ship Dates History Billing

Order ID: 370276 Ship ID: 1 Type: T Customer ID: AGCALJAM Cust PO: PO1928 Reference: REF# 9

To Facility: DMJ Appointment Date/Time: 10/21/2013 RMA: Bill of Lading: BL09876

Status: Released Status by: ANN Status Update: 10/18/2013 10:30:19 AM Priority: Normal Shipper: OneTime

Load: Stop: Shipment: Load Status: Load Appointment Date/Time: Has Consumables

Wave: Print Receiver Reprint PO Confirmation Print Order Check

Items... Cancel Assign to load... Print Pack List

Print COA View Attachment Tab View Plates Create Overs


Legend: Hazardous Over Short Cancelled

Drag a column header here to group by that column Grid Actions

Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Ordered Item
1001		40	Case			Case	40	1001
1		40		0	0			

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Ship Order

- Select Edit from the menu bar and choose the Aggregate Inventory and Ship Order options. The Ship Order screen appears.
- Enter the transfer order number and press Enter. You can double click or use the look-up button  to select the order.

Ship Order

Header

Order ID: 370276 Released


Total to Pick 40

Stage Location: Pick

Print Labels

Door Location: Carrier: ABF

Bill of Lading: Trailer:

Seal: Actual Ship Date: 10/18/2013 

Pro Number: Pick & Ship

Trailer Temperatures

Nose: Middle: Tail:

Note: Changes are not allowed to the item details for transfer orders.

Item Details

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Alternate UOM
1	1001	1016	370263	AA0103B	20	CS	(1 Pallet)
2	1001	1016	370263	AA0103C	20	CS	(1 Pallet)

Required Pallet Tracking

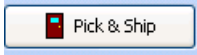
Pallet Type: Qty In: 0 Qty Out: 0

Note: The comments in red stating no changes are allowed for transfer orders.

- Fill in the remainder of the header information as needed.

Required Fields:

- Staging Location
- Door Location
- Trailer

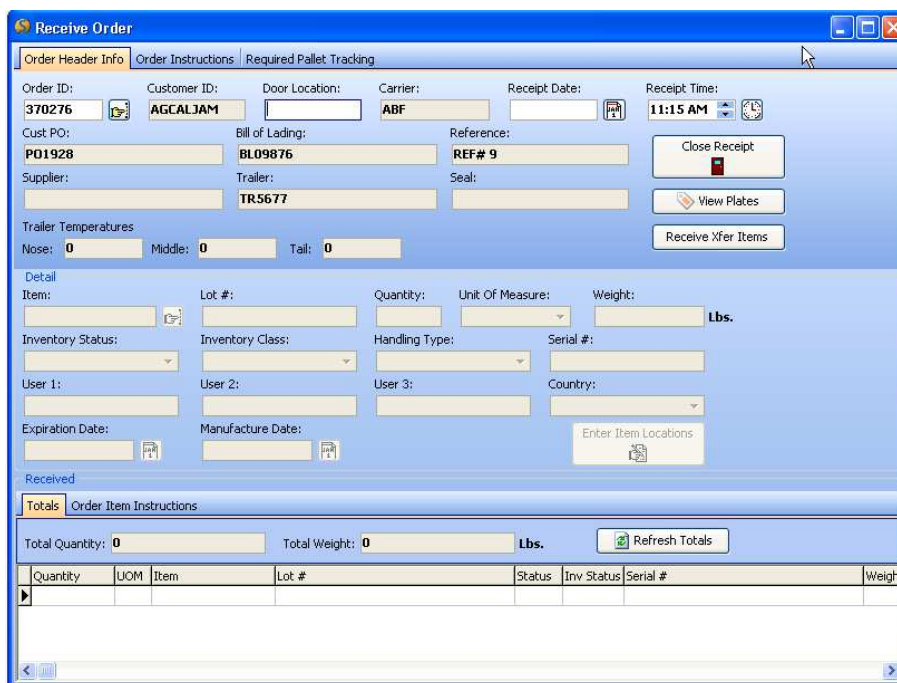
- Once all of the fields have been updated, click the Pick & Ship button  to ship the order. A confirmation window appears. Click Yes.

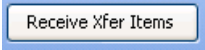
Note: If you want to pick the transfer without immediately shipping it, click the Pick button.

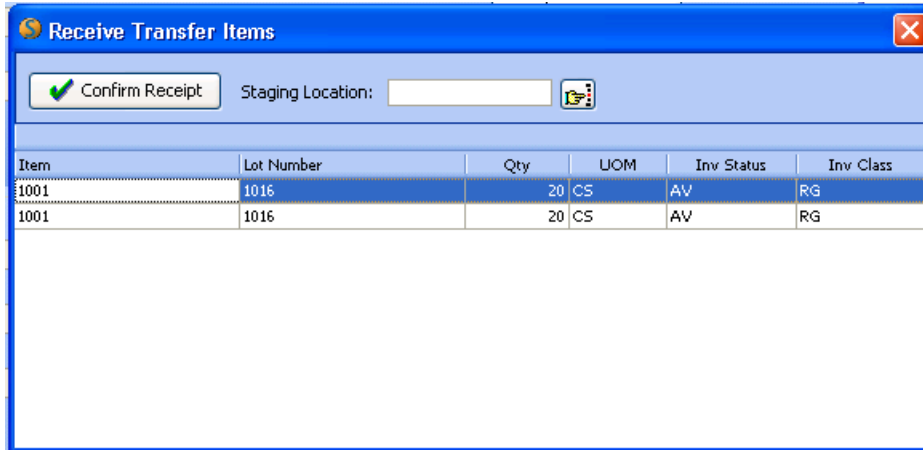
Receive Order

To receive the transfer order:

- Log into the ship-to Facility.
- Select Edit from the menu bar and choose Aggregate Inventory and Receive Order. The Receive Order screen appears.
- Type the Order ID (this is the same order id as the outbound transfer). Press Enter.


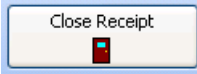


- Enter a Door Location. This is a required field.
- Click the Receive Xfer Items button . A Receive Transfer Items screen appears.



The 'Receive Transfer Items' window has a title bar with a close button. Below the title bar is a 'Confirm Receipt' button with a green checkmark icon. To its right is a 'Staging Location' text field followed by a folder icon. Below this is a table with the following data:

Item	Lot Number	Qty	UOM	Inv Status	Inv Class
1001	1016	20	CS	AV	RG
1001	1016	20	CS	AV	RG

- Enter a Staging Location. This is a required field.
- Click the Confirm Receipt button . The stock is received in the staging location you entered.
- To close the order, click the Close Receipt button . A confirmation window appears.



The 'Confirm' dialog box has a title bar with a close button. It contains a question mark icon and the text 'Okay to close this receipt?'. At the bottom are 'Yes' and 'No' buttons.

- Click Yes.


Note: The system will NOT allow any changes to the quantities or information being received. Any adjustments must be done after the receipt is closed.

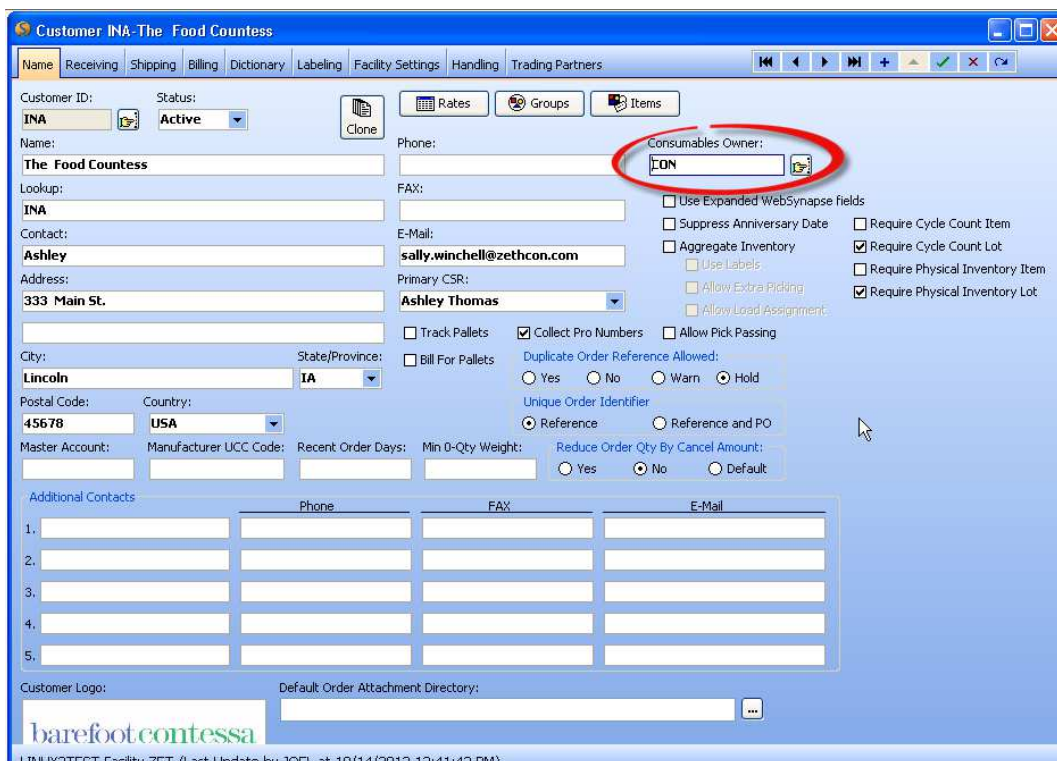
Using an Aggregate Inventory Customer for Consumables Processing

A non-Aggregate Inventory Customer can define an Aggregate Inventory Customer as the consumable owner. Consumables are materials such as empty barrels, boxes and finishing materials that are used during order processing for the non-Aggregate Customer. When orders

are being processed (either inbound or outbound), you can check the Has Consumables check box on the order header, and a Consumables Tracking tab appears.

Customer Setup

- Select Setup from the menu bar and choose the Customer and Customer Maintenance options. The Customer Setup screen appears.
- Make sure the customer you want to edit is selected.
- Enter a Consumables Owner. Double click in the field or click the look-up button to select a customer from a look-up screen.
- Click the save changes button  to save your changes.



The screenshot shows the 'Customer Setup' window for 'The Food Countess'. The window has a menu bar with options: Name, Receiving, Shipping, Billing, Dictionary, Labeling, Facility Settings, Handling, and Trading Partners. The 'Name' tab is selected. The form contains the following fields and options:

- Customer ID:** INA
- Status:** Active
- Name:** The Food Countess
- Lookup:** INA
- Contact:** Ashley
- E-Mail:** sally.winchell@zethcon.com
- Address:** 333 Main St.
- Primary CSR:** Ashley Thomas
- City:** Lincoln
- State/Province:** IA
- Postal Code:** 45678
- Country:** USA
- Master Account:**
- Manufacturer UCC Code:**
- Recent Order Days:**
- Min O-Qty Weight:**
- Consumables Owner:** INA (highlighted with a red circle)
- Options:**
 - ☐ Use Expanded WebSynapse Fields
 - ☐ Suppress Anniversary Date
 - ☐ Aggregate Inventory
 - ☐ Use Labels
 - ☐ Allow Extra Picking
 - ☐ Allow Load Assignment
 - ☐ Track Pallets
 - ☐ Bill For Pallets
 - ☒ Collect Pro Numbers
 - ☐ Allow Pick Passing
 - ☐ Require Cycle Count Item
 - ☒ Require Cycle Count Lot
 - ☐ Require Physical Inventory Item
 - ☒ Require Physical Inventory Lot
- Duplicate Order Reference Allowed:**
 - ☐ Yes
 - ☐ No
 - ☐ Warn
 - ☒ Hold
- Unique Order Identifier:**
 - ☒ Reference
 - ☐ Reference and PO
- Reduce Order Qty By Cancel Amount:**
 - ☐ Yes
 - ☒ No
 - ☐ Default
- Additional Contacts:** A table with 5 rows and 4 columns: Name, Phone, FAX, E-Mail.
- Customer Logo:** barefootcontessa
- Default Order Attachment Directory:**

Consumable Tracking

During order entry, checking the Has Consumables box on the Order Info screen will make the Consumables Tracking tab available for entry. No billing is associated with the use of the consumables.

Note: The Duplicate Order button will not duplicate the consumables from the original order but will duplicate the Has Consumables check box.

Order 370243-1 for Customer INA

Order ID: 370243 Ship ID: 1 Type: 0 Customer ID: INA Cust PO: P057588 Reference: 932547

To Facility: Appointment Date/Time: 10/14/2013 RMA: Bill of Lading:

Status: Entered Status by: ANN Status Update: 10/11/2013 1:11:19 PM Priority: Normal Shipper: ☐ OneTime

Load: Stop: Shipment: Load Status: Load Appointment Date/Time:

Wave: ☐ Has Consumables

Print Receiver Reprint PO Confirmation Print Order Check

Items... Cancel Assign to load... Print Pack List Split Shipment Duplicate Order


Print COA View Attachment Tab View Plates Create Overs

Legend: Hazardous Over Short Cancelled

Drag a column header here to group by that column

Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Ordered Item
APPLE		5	Case			Case	5	APPLE
BUTTER		3	Each			Each	3	BUTTER
2		8		0	0			

LINUX2TEST Facility ZET (Last Update by ANN at 10/11/2013 1:11:19 PM)

- On the Consumables tab, enter the item that is being consumed for the order. Double click in the Consumable Item field or click the ellipsis button  to select an item from a list.
- Enter the location and quantity of the consumable.

Order 370243-1 for Customer INA

Order Info Shipping Summary Comments Ship To Addl. Info Transportation Ship Dates Consumables Tracking History Billir

Consumable Item: BOXES From Location: AA0101A Quantity: 3

Drag a column header here to group by that column


Order ID	Ship ID	Facility	Item	From Location	Qty	Last User	Last Update
<No data to display>							
0							

Legend: Hazardous Over Short Cancelled

Drag a column header here to group by that column

Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Ordered Item
APPLE		5	Case			Case	5	APPLE
BUTTER		3	Each			Each	3	BUTTER
2		8		0	0			

LINUX2TEST Facility ZET (Last Update by ANN at 10/11/2013 1:11:19 PM)


- Click the save changes button  to save your changes. An inventory adjustment to the consumables inventory occurs.

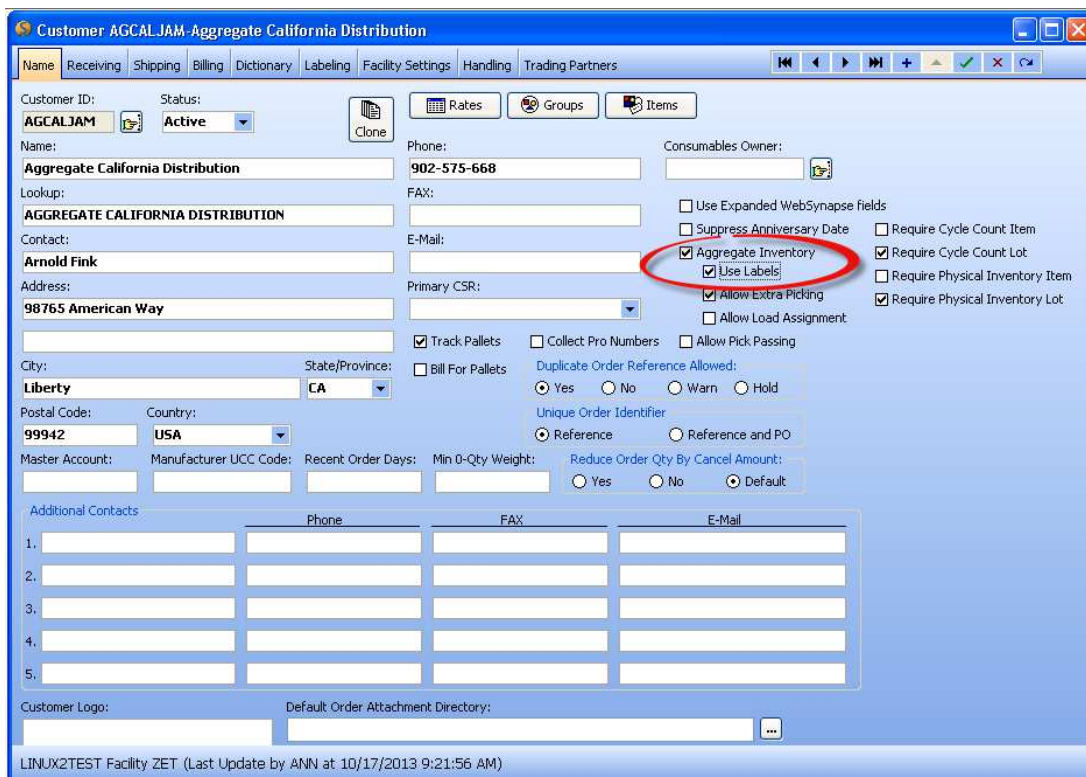
Note: Order changes such as de-picking, order cancellation, etc. will not change the Consumable Tracking entry. Inventory adjustments must manually be made to the consumables inventory at the aggregate inventory customer if the consumable inventory was not used.

Label Print in Wave Release


Customer Setup

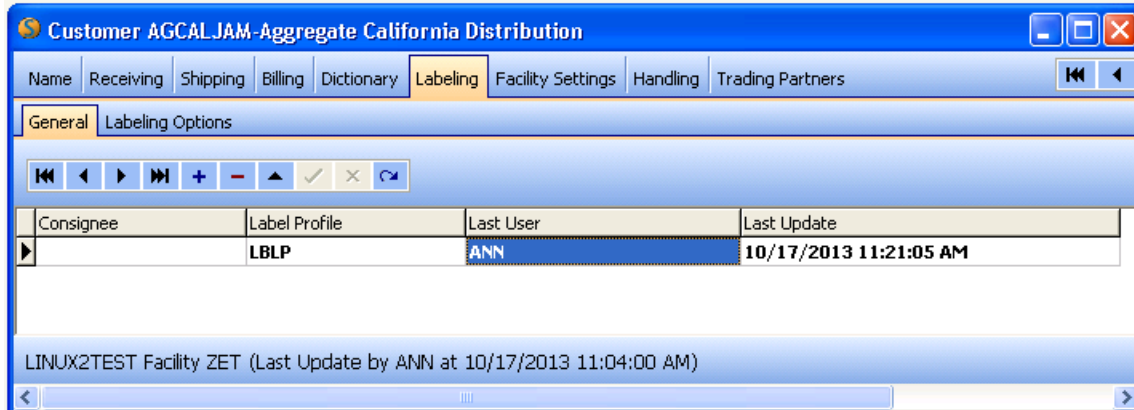
Labels can be printed along with the picking list at wave release. Labels can be set up specifically by customer. This will allow the print label prompt to only be displayed for the applicable customers.

- Select Setup from the menu bar and choose the Customer and Customer Maintenance options. The Customer Setup screen appears.
- Make sure the customer you want to edit is selected.
- Check the Use Labels box. Click the save changes button .



- Select the Labeling tab.

- Select a Label Profile (label format and parameters) that will be used for the customer.
Note: you can select a different profile by Consignee if required.
- Check the Use Labels box. Click the save changes button .



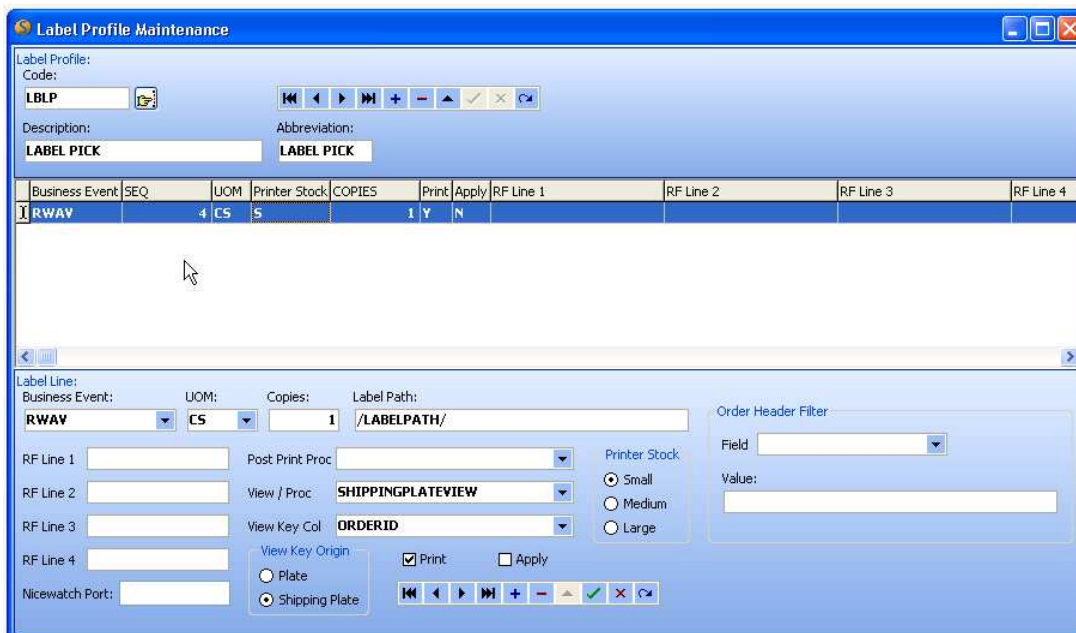
Consignee	Label Profile	Last User	Last Update
	LBLP	ANN	10/17/2013 11:21:05 AM

LINUX2TEST Facility ZET (Last Update by ANN at 10/17/2013 11:04:00 AM)

Label Profile Setup

The label profile should be associated with the RWAV (Release Wave) business event.

- Select setup from the menu bar and click Label Profiles. The Label Profile Maintenance screen appears.
- You can enter/select a label and enter the RWAV business event.



Business Event	SEQ	UOM	Printer Stock	COPIES	Print	Apply	RF Line 1	RF Line 2	RF Line 3	RF Line 4
RWAV		4 CS	S	1	Y	N				

Label Line: Business Event: RWAV UOM: CS Copies: 1 Label Path: /LABELPATH/

RF Line 1: RF Line 2: RF Line 3: RF Line 4:

Post Print Proc: View / Proc: SHIPPINGPLATEVIEW View Key Col: ORDERID View Key Origin: ☒ Shipping Plate ☐ Plate ☐ Plate

Printer Stock: ☒ Small ☐ Medium ☐ Large

Order Header Filter: Field: Value:

When the wave is released, after the report Print window, a window appears so that you can enter the number of labels requested.

Move Inventory

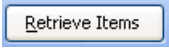
The Aggregate Inventory Move Inventory screen allows product to be relocated as a move instead of an inventory adjustment.

- Select Edit from the menu bar and click Aggregate Inventory and Move Inventory. The Aggregate Inventory Rewarehousing screen appears:


Aggregate Inventory Rewarehousing: Facility - ZET





Location:


Item / Description	Receipt ID	Lot Number	Qty / UOM	Move Qty	New Loc
--------------------	------------	------------	-----------	----------	---------

- Enter a location within the current facility. You can double click in the Location field or click the look-up button to access the Location Look-up screen.
- Click the Retrieve Items button  to retrieve a list of the Aggregate Inventory Items in the location.

Aggregate Inventory Reworkhousing: Facility - ZET


Location: AA0103B 





Item / Description	Receipt ID	Lot Number	Qty / UOM	Move Qty	New Loc
1001 Divination Crystal Orb	370263	1016	20 CS	<input type="text" value="0"/>	<input type="text"/> 
1001 Divination Crystal Orb	370263	1016	20 CS	<input type="text" value="0"/>	<input type="text"/> 
1001 Divination Crystal Orb	370263	1016	20 CS	<input type="text" value="0"/>	<input type="text"/> 
1001 Divination Crystal Orb	370263	1016	20 CS	<input type="text" value="0"/>	<input type="text"/> 


- Enter the quantity to move in the Move Qty field and the move to location in the New Location field. You can double-click in the New Location field or click  to perform a location look-up.

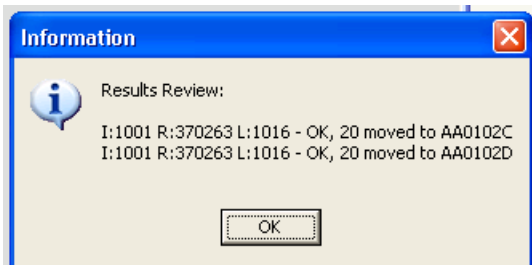
More than one move can be done at the same time. The Location Status of No Service and Location Type of Staging are not allowed.

Aggregate Inventory Reworkhousing: Facility - ZET

Location: AA0103B 

Item / Description	Receipt ID	Lot Number	Qty / UOM	Move Qty	New Loc
1001 Divination Crystal Orb	370263	1016	20 CS	<input type="text" value="20"/>	<input type="text" value="AA0102C"/> 
1001 Divination Crystal Orb	370263	1016	20 CS	<input type="text" value="0"/>	<input type="text"/> 
1001 Divination Crystal Orb	370263	1016	20 CS	<input type="text" value="20"/>	<input type="text" value="AA0102D"/> 
1001 Divination Crystal Orb	370263	1016	20 CS	<input type="text" value="0"/>	<input type="text"/> 

- Click the Move Inventory button . An information window appears confirming that the quantity is within the maximum available, the New Location is not blank and is a valid location. (I = Item, R = Receipt, L = Lot)



The system then checks to see if an LP exists in the New Location with the identical Item, Lot number and Receipt number. If one does exist, the quantity is updated on the new location's existing LP. If one does not exist, a new LP is created in the new location, or if moving an entire plate, the new location is updated.

Move Inventory Error Messages

You may receive an error message for the following scenarios:

- The New Location field cannot be blank.
- The Location is not a valid Location.
- The system indicates that the location is empty.
- The quantity to move is greater than the available quantity.
- The system indicates no aggregate inventory in the location.

Billing

Receipt Billing

The RECO (Receipt Close) business event is valid for inventory received via the aggregate inventory method.

The following Billing Business Events are **NOT** valid for this type of receiving:

EMPT - Empty Trailer is only valid for RF processing

ODAC - Order Creation (Add) via CRT -- Not Valid for receipt orders entered and/or released using the Edit/Aggregate Inventory/Receive Order screen.

RCNX/RCXD - Receipt Non-Cross Dock/Receipt Cross-Dock. These Business events are used in tandem for cross-docking receipts and not valid for receipt orders entered and/or released using the Edit/Aggregate Inventory/Receive Order screen

RECH - Used for 1-step and ASN receiving and only valid for RF processing

RPUT - Option 15 - Putaway RIs is only valid for RF processing

Accessorial Billing

The SHIP (Ship Order Close) business event is valid for inventory shipped via the aggregate inventory method.

Renewal Storage Billing

This processing is the same for aggregate inventory customers, except PLCT (pallet count). The Bill Method of PLCT is not recommended for customers using aggregate inventory. This method looks at the number of license plates when calculating the Renewal Storage. Since aggregate inventory does not use physical license plates for each pallet, the calculation could be greatly understated to the actual number of pallets.

Catch Weight Billing


For more detail, please refer to the Catch Weight chapter.

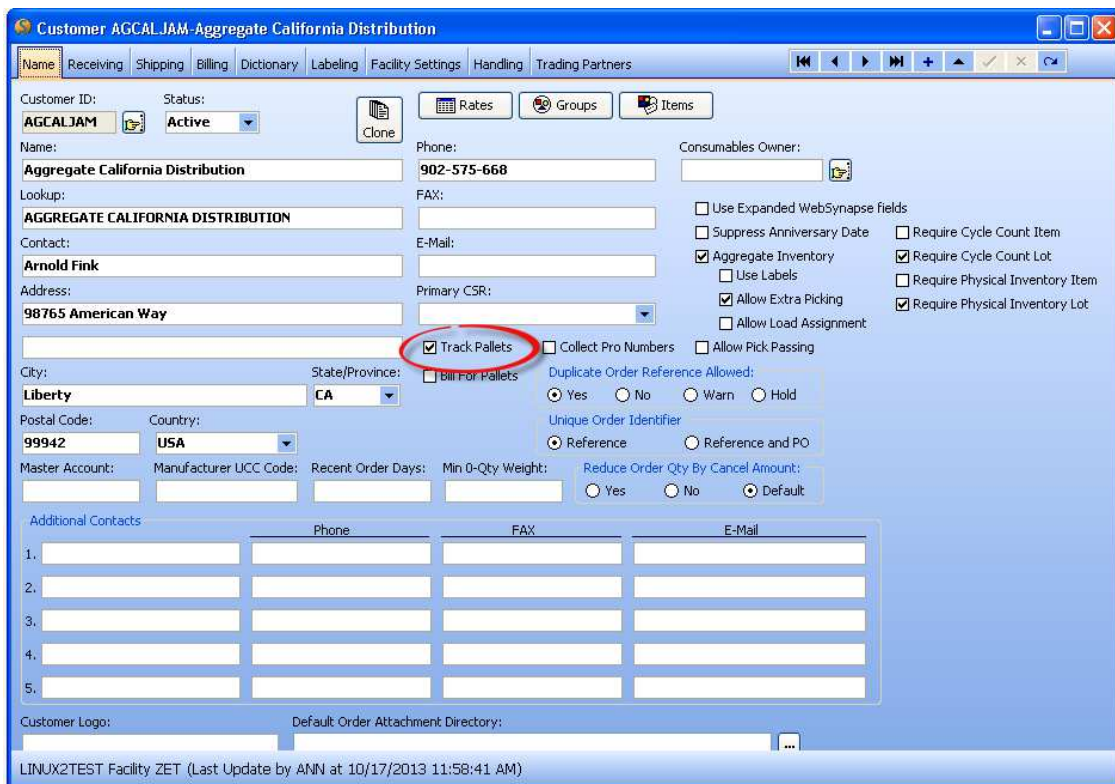
Pallet Tracking

Pallet Tracking is available for customers that are using the Aggregate Inventory functions. You have the ability to enter pallet tracking information on the Receive Order and Ship Order screens.

Customer Setup

In order to use the pallet tracking function, the option must be activated on the Customer Maintenance screen.

- Select Setup from the menu bar and choose the Customer and Customer Maintenance options. The Customer Setup screen appears.
- Make sure the customer you want to edit is selected.
- Check the Track Pallets box. Click the save changes button .



The screenshot shows the 'Customer AGCALJAM - Aggregate California Distribution' window. The 'Name' tab is selected. The 'Track Pallets' checkbox is checked and highlighted with a red circle. Other visible fields include Customer ID (AGCALJAM), Status (Active), Name (Aggregate California Distribution), Phone (902-575-668), Address (98765 American Way), and City (Liberty, CA). The 'Additional Contacts' section has five rows for Name, Phone, FAX, and E-Mail. The bottom status bar indicates 'LINUX2TEST Facility ZET (Last Update by ANN at 10/17/2013 11:58:41 AM)'.

Outbound Pallet Tracking Defaults can be entered on the Shipping Options 2 tab.

- Select the Shipping and Options 2 tab.
- You can set a:
 - Default Quantity – Defaults a pallet quantity for orders and receipts.
 - Default Pallet Type – Defaults a pallet type for orders and receipts. You can use the drop down box to select a pallet type.

Customer AGCALJAM - Aggregate California Distribution

Options - 1 Options - 2 Options - 3 Options - 4 Options - 5 Instructions BOL Comments Pack List Audit Locations Carriers Notification SIP TMS Custom BOL # Carri

Wave Template for Imported Orders:

☐ Reject short orders and allow resubmission ☐ Line Number Processing ☐ Pick by Line Number

Order Confirmation Export Format:

Reject Notification Export Format:

CHEP Sender ID:

Consolidated Waves Template Defaults

☐ Consolidate Orders

Shipment Type:

Carrier:

Service Level:

Shipment Cost:

Pallet Tracking Defaults

Default Quantity:

Default Pallet Type:

Assign Stop By Passthru

☐ Auto Assign Stop

Load Field:

Stop Field:

☒ Allow mixed orders on outbound shipping plates ☐ Track Picked Pick Front Plates

☐ Track Outbound Trailer Temperatures ☐ Allow outbound order entry of minimum days to expiration

☐ Shipping Insurance

☐ Calc Qty from Item on Catch Weight Order by Weight

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Receive Order Pallets

The Receive Order screen has a tab called Required Pallet Tracking to allow the entry of pallet information. This tab is only displayed if the customer is setup for Pallet Tracking.

- On the Receive Order screen, select the Required Pallet Tracking tab at the top of the screen.
- Enter a Pallet type. You can use the drop down to select a value form a list.
- Enter the quantity you received in the Qty In field and the quantity you shipped (pallet exchange with the carrier) in the Qty Out field.

Receive Order

Order Header Info Order Instructions Required Pallet Tracking

Pallet Type: Qty In: Qty Out:

Chep Pallet 3 0

Detail

Item: Lot #: Quantity: Unit Of Measure: Weight:

Ship Order Pallets

The Ship Order screen has Pallet Tracking fields located at the bottom of the screen. The fields are available for entry if the customer is setup for pallet tracking.

- Enter a Pallet type. You can use the drop down to select a value from a list.
- Enter the quantity you received (pallet exchange with the carrier) in the Qty In field and the quantity you shipped in the Qty Out field.

Ship Order

Header

Order ID: **370261**

Picking Complete

Total to Pick: **120**

Stage Location: **STG15**

Door Location:

Carrier: **ABF**

Bill of Lading:

Trailer:

Seal:

Actual Ship Date: **10/17/2013**

Pro Number:

Print Labels

Pick & Ship

Trailer Temperatures

Nose: Middle: Tail:

Item Details

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	ternate UOM
1	1001	312506101	370258	STG15	20	CS	(1 Pallet)
2	1002	31250709	370258	STG15	50	CS	(2 Pallet, 10
3	1002	31250709	370258	STG15	50	CS	(2 Pallet, 10
4							(N/A)

Required Pallet Tracking

Pallet Type: **Chep Pallet**

Qty In: **0**

Qty Out: **5**

Pallet Inventory Totals

The Pallet Tracking activity is captured on the Pallet Inventory Totals screen. This screen shows the pallet totals by type in the upper portion of the screen. In the lower portion of the screen all of the activity is displayed. Pallet adjustments are handled as normal (Please refer to the Pallet Tracking chapter of the User Manual for further information on this topic).

- Select Lookup from the menu bar and choose Pallet Inventory Total. The Pallet Inventory Totals screen appears:

Pallet Inventory Totals

Facility: Customer ID:

Pallet Type: ☒ Include ☐ Exclude

Facility	Cust ID	Pallet Type	Pallet Count

Facility	Customer	Pallet Type	Adj Reason	Load No	Carrier	Order ID	Ship ID	In Pallets

- Enter the Facility and Customer ID. Double click in these fields to look-up and select a value from a list. These are required fields.
- Click on the Include or Exclude button to include/exclude a particular pallet type from the totals.
- Enter the pallet type you want included/excluded. Double click in the field select a value from a list.
- Click the process button. Pallet inventory information for the criteria you entered appears on the screen:

Pallet Inventory Totals

Facility: Customer ID:

Pallet Type: ☒ Include ☐ Exclude

Facility	Cust ID	Pallet Type	Pallet Count
ZET	AGCALJAM	(TOTAL)	20
ZET	AGCALJAM	WOOD	20

Facility	Customer	Pallet Type	Adj Reason	Load No	Carrier	Order ID	Ship ID	In Pallets	Out Pallets	Last Updated
ZET	AGCALJAM	WOOD	Inbound	200825	3WAY	368478	1	2	0	5/7/2010 12:51:02 PM
ZET	AGCALJAM	WOOD	Outbound	201129	3WAY	369281	1	0	0	2/27/2012 10:09:14 PM
ZET	AGCALJAM	WOOD	Outbound	201604	3WAY	368477	1	0	0	8/13/2013 7:58:16 PM
ZET	AGCALJAM	WOOD	Inbound	201542	ABF	370049	1	1	0	5/13/2013 7:55:21 PM
ZET	AGCALJAM	WOOD	Inbound	201651	ABF	370259	1	3	0	10/16/2013 9:21:36 PM
ZET	AGCALJAM	WOOD	Inbound	201652	ABF	370263	1	15	0	10/16/2013 11:43:19 PM
ZET	AGCALJAM	WOOD	Outbound	201658	ABF	370265	1	0	4	10/16/2013 4:04:23 PM
ZET	AGCALJAM	WOOD	Inbound	201661	ABF	370267	1	5	0	10/17/2013 9:01:15 PM
ZET	AGCALJAM	WOOD	Outbound	201662	ABF	370268	1	0	1	10/17/2013 9:45:14 PM
ZET	AGCALJAM	WOOD	Outbound	201663	ABF	370268	1	0	1	10/17/2013 9:46:12 PM
ZET	AGCALJAM	WOOD	Outbound	201049	CPU	369060	1	0	0	1/10/2012 12:00:30 PM

Security

- "ReceiveOrderForm" is in the Synapse security list and security should be added for the CRT operators and/or Security Groups using the receiving option.
- "ShipOrderForm" is in the Synapse security list and security should be added for the CRT operators and/or Security Groups using the ship option.
- "DepickOrderForm" is in the Synapse security list and security should be added for the CRT operators and/or Security Groups using the depick option.
- "MoveInventoryForm" is in the Synapse security list and security should be added for the CRT operators and/or Security Groups using the Move Inventory form.

Synapse Processes not available to Aggregate Inventory Customers

Following is a partial list of processes not supported for AI Customers:

- RF

Note: Aggregate customer's product should not be stored in the same locations as RF customers; the system will not be able to process cycle count functions for aggregate customers. This will result in product being moved to Suspense.

- Kitting and De-Kitting
- Cycle Counting
- ABC Cycle Counting
- Returns Order Processing
- Consolidated Order Processing
- Mass Manifesting Processing
- Item Pick Fronts and Replenishment Processing
- QA inspection
- MultiShip processing
- Confirm Picks

Converting to Aggregate Inventory

In the event that it is decided to convert an RF customer to Aggregate Inventory, there are a few considerations:

- You must review existing inventory without a Receipt Order ID. In order to process an outbound order using the aggregate inventory process, the existing inventory must have a receipt order associated with each LP. If inventory was added by other methods such as cycle count, inventory load or location load, there will be no receipt order associated with it. This inventory must be corrected before it can be shipped out using the aggregate inventory process. Contact the TSD at Zethcon for more information.
- You must check the Rate setup. If there are any rates set up for the customer with a business event that is not supported by aggregate inventory, they will need to be changed.

Converting to RF Inventory

In the event that it is decided to convert an Aggregate customer to RF Inventory, there is an RF function that will support this conversion. Since the RF processing deals with actual physical LP's, you will be prompted to assign new LP's at the same time that the inventory is being converted.

Conversion Preparation

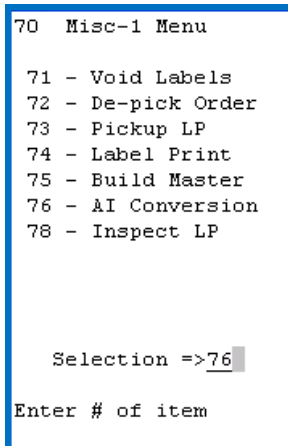
Before beginning this process, there is some preparation that needs to be done.

- There can be no open orders or receipts.
- There can be no tasks.
- All plates must be in either Available - A or Picked – P status.
- The customer must be setup as an aggregate inventory customer. Do not change this setting. The setting will be changed once the conversion process has been started on the RF.
- An adequate supply of new LP labels is available.
- It is strongly recommended that a physical check of product be done prior to the conversion. This is to ensure that product is in it's location as recorded in the system. The conversion process will not allow inventory to be created in a location that is not an expected conversion location.
- The system prevents more than one RF operator to convert in the same location at the same time. Product may need to be moved prior to the conversion to accommodate multiple operators for the conversion.
- All of the inventory for the customer must exist in the same facility. This processing does not support conversion of inventory from multiple facilities.

RF Option 76 - AI Conversion

An RF function is available to support the conversion of an Aggregate Inventory customer to an RF customer. This screen is used to convert the inventory, assign LP's and adjust/update/delete the old inventory one location at a time.

- On the RF, type 76 – AI Conversion and press Enter.



```
70 Misc-1 Menu

71 - Void Labels
72 - De-pick Order
73 - Pickup LP
74 - Label Print
75 - Build Master
76 - AI Conversion
78 - Inspect LP

Selection =>76
Enter # of item
```

- Type the Customer ID number that you are converting in the Customer field and press Enter.

```
76  AI conversion
Customer AGCALJAM
Enter customer
```

A message appears confirming that the customer is AI and that you want to convert to RF.

WARNING: Take the message seriously -- There is NO backing out.

```
76  AI conversion
Customer AGCALJAM
Customer currently
uses Aggregate
Inventory.
To convert to rf,
Respond with Y to
the question on the
last line.
Convert to rf?
```

- Enter Y to continue.

Several checks will be executed (e.g., no open orders or receipts, no tasks, all plates in either A or P status). If the checks are passed, the Aggregate Inventory flag on the customer will be reset and all of the available plates will have their status changed to X (Conversion).

Note: At this point, multiple operators can actively convert as long as they are in separate locations.

The screen shows a scrollable list of locations that have plates which need to be converted. The v and ^ characters are used to indicate which way you can scroll (this

would be displayed on the right side of line 2, if applicable). If you exit (F1) and re-access the screen, enter the same customer to see this scrollable list.

```

76  AI conversion
Customer agcaljam

AAO101B  STO
AAO101C  STO
AAO102A  STO
AAO102B  STO
AAO102C  STO
AAO102D  STO
AAO103A  STO
AAO103B  STO
AAO103C  STO
AAO104A  STO
AAO104B  STO  v
Select a location
    
```

- Move the cursor up and down using the arrow and tab keys. To select a location, enter any non-blank character on the left of the location and press Enter. A screen with group information for the location appears:

```

76  AI conversion
Customer AGCALJAM
Location AAO101B
Itm 1001
LOT 312506101
Qty 40      UOM CS
Receipt 370258-1
Rcpt Date 10/15/2013
Crte Date 10/15/2013
Class RG   Inv Sts AV

=== Build Plates ===
Count      Qty
LP#1
Scroll, F4-select
    
```

A group consists of all plates (which now have a status of X) in a location that are for the same item, lot, receipt, creation date, inventory status and inventory class.

- Press F4 to enter data in the lower (Build Plates) section of the screen.

Note: After you enter F4, that location and item are locked. This means that only 1 person can be converting an item within a location.

Pallets of Equal Quantity

To create multiple LP's with the same quantity:

- Enter the number of plates in the Count field and the quantity per plate in the Qty field and a starting LPID. Press Enter.

The Count (number of plates) will be multiplied by the Qty (per plate) to create the number of plates all with the equal quantities. The LPID's will be created in sequential order.

```
76  AI conversion

Customer AGC&LJAM
Location AA0101B
Itm 1001
LOT 312506101
Qty 40      UOM CS
Receipt 370258-1
Rcpt Date 10/15/2013
Crte Date 10/15/2013
Class RG   Inv Sts AV

=== Build Plates ===
Count 2   Qty 20
LP#1 000010182013001
Create new LPs?
```

A "Create new LPs?" message appears.

- Type Y and press Enter to create the new LPs. The new LP's are created and the original LPs are deleted.

The new LP retains the same create date as the original LP for the purposes of calculating anniversary billing and FIFO, if necessary.

The original LP is associated with the new LP.

Note: You cannot use the LPID of an existing plate. You will receive an error message 'LP #nn in use' (Where nn is the sequence in error – e.g. if you create 10 LPs starting with 000000000000233 and 000000000000237 already exists, you will get the message 'LP #5 exists'), even if it is one of the 'old' plates.

Pallets with Multiple Quantities

To create LP's that do not have the same quantity per pallet:

- Enter 1 in the Count field, the quantity in the Qty field and the new LPID. Press Enter. A "Shortage (MNY)?" message appears:

```

76  AI conversion

Customer AGCALJAM
Location AA0102C
Itm 1001
LOT 1016
Qty 20      UOM CS
Receipt 370263-1
Rcpt Date 10/16/2013
Crte Date 10/16/2013
Class RG   Inv Sts AV

=== Build Plates ===
Count 1  Qty 15
LP#1 000010182013003
Shortage (MNY) ?

```

- M – More - creates the plates and deletes only the same amount from the original plates. This assumes that you will want to create more LPs with a different quantity.
 - N –No – Select this to nothing. The cursor moves back to the Count field.
 - Y – Yes - Adjusts the existing plates, creates the new plates and deletes the original. This assumes that you do not want to create more LPs for the location.
- Type M and press Enter.

The screen updates with the remaining quantity. Continue to enter the counts, quantities and LPs until the balance is depleted.

```

76  AI conversion

Customer AGCALJAM
Location AA0102C
Itm 1001
LOT 1016
Qty 5      UOM CS
Receipt 370263-1
Rcpt Date 10/16/2013
Crte Date 10/16/2013
Class RG   Inv Sts AV

=== Build Plates ===
Count  Qty
LP#1
Enter new LP data

```

Plates with an Overage Quantity

To create LP's that have more than the expected quantity:

- Enter 1 in the Count field, the quantity (per pallet) in the Qty field and the new LPID. Press Enter.

A “Create Overage?” message appears:

```
76  AI conversion

Customer AGCALJAM
Location AA0102D
Itm 1001
LOT 1016
Qty 20      UOM CS
Receipt 370263-1
Rcpt Date 10/16/2013
Crte Date 10/16/2013
Class RG  Inv Sts AV

=== Build Plates ===
Count 1  Qty 25
LP#1 000010182013005
Create overage? █
```

- Type Y to process the overage. An inventory adjustment is performed on an existing plate and then the new LPs are created and original LPs are deleted.

Pallets with a Shortage Quantity

To create LP's that have less than the expected quantity:

- Enter the LP count in the Count field, the quantity (per pallet) in the Qty field and the new LPID. Press Enter. A “Shortage (MNY)?” message appears:

```
76  AI conversion

Customer AGCALJAM
Location AA0103B
Itm 1001
LOT 1016
Qty 20      UOM CS
Receipt 370263-1
Rcpt Date 10/16/2013
Crte Date 10/16/2013
Class RG  Inv Sts AV

=== Build Plates ===
Count 1  Qty 19
LP#1 000010182013007
Shortage (MNY)? █
```

- M – More - creates the plates and deletes only the amount entered from the original plates. This assumes that you will want to create more LPs with a different quantity.
- N –No – Select this to nothing. The cursor moves back to the Count field.
- Y – Yes - Adjusts the existing plates, creates the new plates and deletes the original. This assumes that you do not want to create more LPs for the location.

- Type Y and press Enter.
The original LP is adjusted to equal the amount of the entry. Next, the new pallets are created with equal quantities (if the Count was greater than 1). The original LP is deleted.

Location Empty – Complete Shortage

It is recommended that a physical check of the product be done prior to the conversion. This is to ensure that the product is in its expected location (as recorded in the system). Performing this function will delete the inventory in the location. You will not be able to add inventory with the RF Conversion function. This could mean that the necessary LP creation date information would be lost for the purposes of anniversary billing or FIFO.

- Enter a 0 in both the Count and Qty fields and leave the LP field blank. Press Enter.

An “Adjust old to 0?” message appears.

```
76  AI conversion

Customer AGCALJAM
Location AA0101C
Itm 1001
LOT 312506101
Qty 20      UOM CS
Receipt 370258-1
Rcpt Date 10/15/2013
Crte Date 10/17/2013
Class RG   Inv Sts AV

=== Build Plates ===
Count 0   Qty 0
LP#1
Adjust old to 0?
```

- Type Y and press Enter to delete the inventory. No new LPs are created.

Adjustment Reason - AE

A new adjustment reason has been added to identify a plate that has been converted. The new adjustment reason is AE – Reidentify.

Security

The RF operator must be granted access to the new RF form “AIConversion”. Security for this option should be granted only during active conversions. Once a conversion is complete, it is recommended that the security for this screen be denied.