

# **AGGREGATE INVENTORY PROCESSING.....3**

OVERVIEW.....	3
CUSTOMER SETUP .....	4
RECEIVING .....	4
Creating a Receipt Order .....	6
Closing the Receipt.....	11
Updating a Receipt Order.....	11
OUTBOUND PROCESSING .....	13
Entering an Outbound Order.....	13
Planning the Wave.....	14
Wave Release and Task Generation.....	16
Picking, Staging and Loading the Order .....	18
Picking Options.....	25
Depicking an Aggregate Inventory Order.....	28
Defining the Outbound Pick List Report.....	30
TRANSFER ORDERS.....	33
Order Entry .....	33
Selecting Stock and Generating Picks.....	35
Ship Order .....	37
Receive Order.....	38
USING AN AGGREGATE INVENTORY CUSTOMER FOR CONSUMABLES PROCESSING .....	39
Customer Setup.....	40
Consumable Tracking .....	40
LABEL PRINT IN WAVE RELEASE .....	42
Customer Setup.....	42
Label Profile Setup.....	43
MOVE INVENTORY .....	44
Move Inventory Error Messages.....	46
BILLING .....	47
Receipt Billing .....	47
Accessorial Billing .....	47
Renewal Storage Billing .....	47
Catch Weight Billing.....	47
PALLET TRACKING .....	47
Customer Setup.....	48
Receive Order Pallets .....	49
Ship Order Pallets.....	50

Pallet Inventory Totals.....	50
SECURITY.....	52
SYNAPSE PROCESSES NOT AVAILABLE TO AGGREGATE INVENTORY CUSTOMERS.....	52
CONVERTING TO AGGREGATE INVENTORY.....	53
CONVERTING TO RF INVENTORY .....	54
Conversion Preparation .....	54
RF Option 76 - AI Conversion .....	54
Plates with an Overage Quantity.....	58
Pallets with a Shortage Quantity .....	59
Adjustment Reason - AE .....	60
Security.....	60

## **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

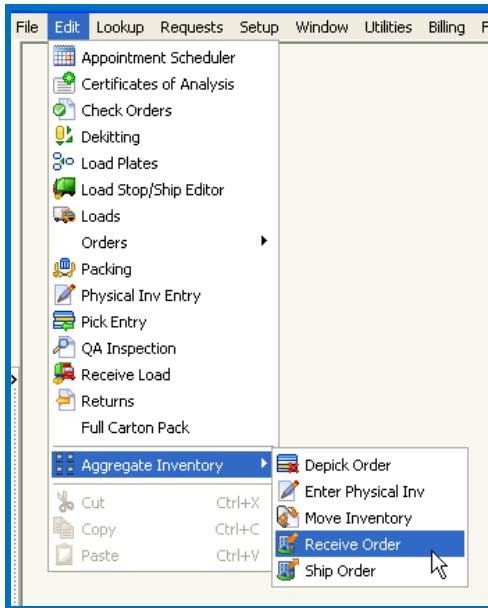
The screenshot shows the 'Customer AGCALJAM-Aggregate California Distribution' setup screen. The 'Name' tab is selected. The 'Aggregate Inventory' checkbox is checked and highlighted with a red circle. Other visible settings include 'Status: Active', 'Phone: 902-575-668', 'E-Mail:', 'Primary CSR:', and various checkboxes for expanded fields, anniversary suppression, and cycle counting.

- 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 displayed in a window titled 'Receive Order'. It has three main tabs at the top: 'Order Header Info', 'Order Instructions', and 'Required Pallet Tracking'. The 'Order Header Info' tab is active. It contains fields for Order ID, Customer ID, Door Location, Carrier, Receipt Date (set to 11:56 AM), Cust PO, Bill of Lading, Reference, Supplier, Trailer, Seal, and a 'View Plates' button. Below these are fields for 'Trailer Temperatures' (Nose, Middle, Tail) and a 'Receive Xfer Items' button. The 'Detail' section follows, containing fields for Item, Lot Number, Quantity, Unit Of Measure (set to Lbs.), Weight, Inventory Status, Inventory Class, Handling Type, Serial Number, User Item 1-3, Country, Expiration Date, Manufacture Date, and an 'Enter Item Locations' button. The 'Received' section at the bottom includes a 'Totals' tab (which is selected) and an 'Order Item Instructions' tab. The 'Totals' tab displays 'Total Quantity' and 'Total Weight' both set to 'Lbs.' with a 'Refresh Totals' button. Below this is a table with columns for Quantity, UOM, Item, Lot Number, Status, Inv Status, Serial Number, and Weight. The table has one row with data. Navigation buttons for 'First', 'Previous', 'Next', and 'Last' are located at the bottom left, and a scroll bar is on the right.

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.

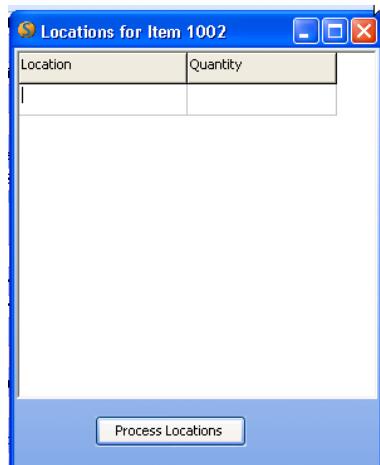
**Country** - This field will be open for entry if it is required.

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

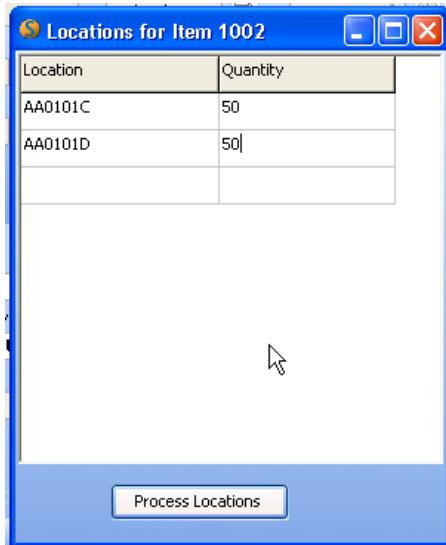
**Manufacture Date** - This field will be open for entry if it is required. You can't enter a future date.

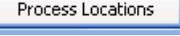
- When you are finished entering detail information for an item, click the Enter Item

Locations button . The Locations for Item screen appears:



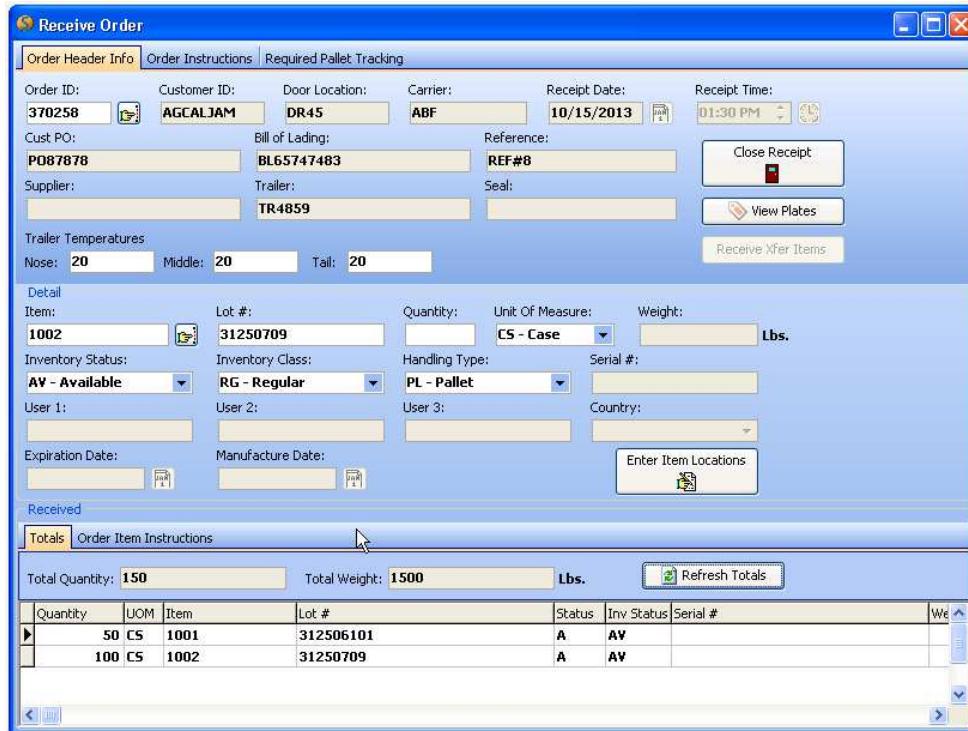
- Type the location where the item is going to be stored in the Location field. You can double click on the field to access the Location Lookup screen.
  - Each entry must be a valid location in the facility.
  - Door locations are not allowed.
  - You can enter multiple locations for the item.
  - The 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.



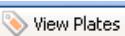
- Click the Process Locations button  to save your changes. The items appear at the bottom of the screen.

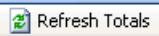
Note: If the sum of the quantity fields does not equal the quantity entered for the item when the “Process Locations” button is used, a confirmation message appears. Select Yes to accept the quantity entered or No to return and update the quantity on the Locations for Items screen.

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).



### **Additional Buttons**

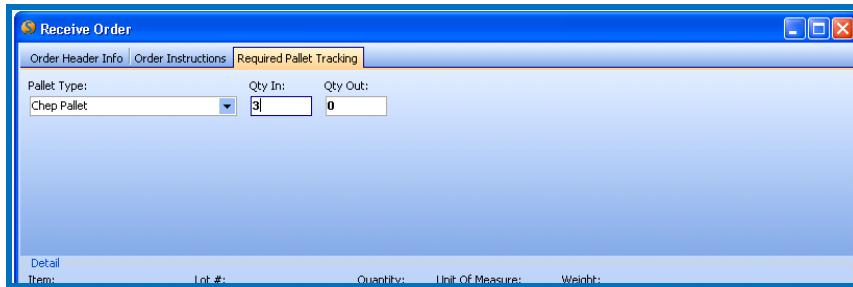
 **View Plates** - Allows you to view the plates that were generated internally for processing purposes. Physical license plate labeling is not required. When you click this button, the Plate Lookup screen appears.

 **Refresh Totals** - 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:

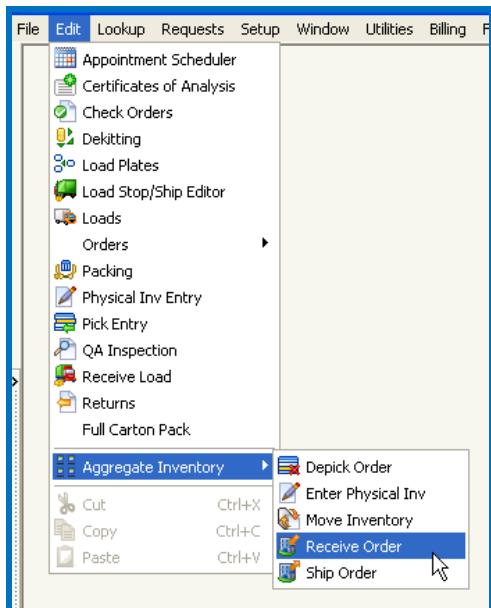


- Click Yes.

## 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 ID: <b>370259</b>	Customer ID: <b>AGCALJAM</b>	Door Location: <b>DR45</b>	Carrier: <b>ABF</b>	Receipt Date: <b>10/16/2013</b>	Receipt Time: <b>08:49 AM</b>		
Cust PO: <b>P08658669</b>	Bill of Lading: <b>BL-58458</b>	Reference: <b>5875859</b>		<b>Close Receipt</b>			
Supplier:	Trailer: <b>9559</b>	Seal:		<b>View Plates</b>			
Trailer Temperatures Nose:      Middle:      Tail:							
Detail Item:      Lot #:      Quantity:      Unit Of Measure:      Weight: 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: <b>200</b>				Total Weight: <b>2000</b> Lbs.	<b>Refresh Totals</b>		
Quantity	UOM	Item	Lot #	Status	Inv Status	Serial #	Weight
<b>200</b>	<b>CS</b>	<b>1002</b>	<b>32890808</b>	<b>A</b>	<b>AV</b>		

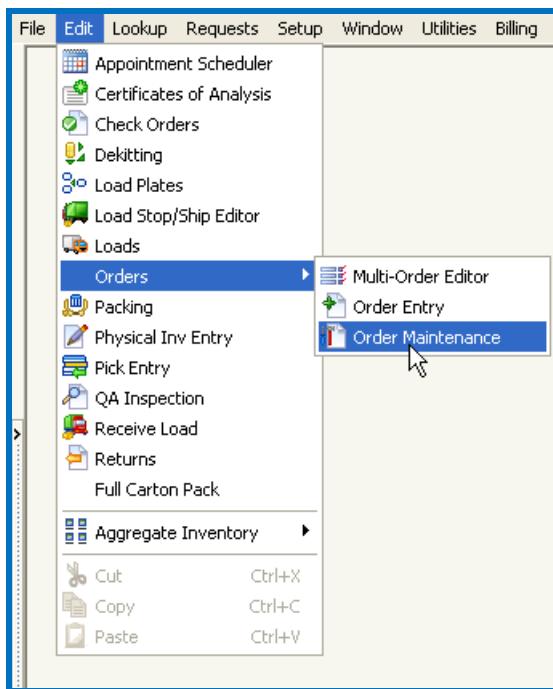
- You can add items to the receipt. You can also update pallet tracking information. See the *Entering Detail Information* and *Tracking Pallets* sections above.

## 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.

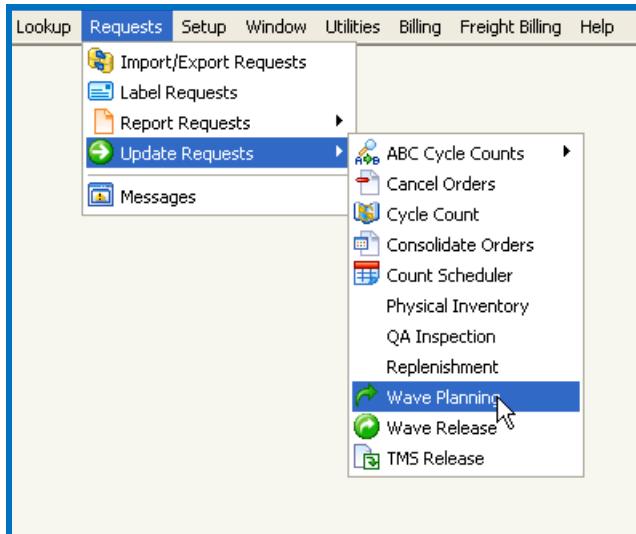
The screenshot shows the Zethcon Order Management System interface. At the top, there's a navigation bar with tabs: Order Info, Summary, Comments, Ship To, Addl. Info, Receiving, Ship Dates, History, and Billing. Below the navigation bar, the main area is titled "Order 370260-1". It contains several input fields and dropdown menus. A dropdown menu for "Type" is open, listing options such as Master Rcpt, Transload/C, FreightOrder, Outbound, Receipt, Transfer, Cross Cust, and ReturnVend. There are also fields for Customer ID, Cust PO, Reference, MA, Bill of Lading, Master Receipt, Priority, Supplier, and Load Appointment Date/Time. Below these fields are several buttons: Print Order Check, Print Pack List, View Attachment Tab, View Plates, and Create Orders. A legend at the bottom indicates four categories: Hazardous (yellow), Over (green), Short (red), and Cancelled (grey). A message "Drag a column header here to group by that column" is displayed above the grid. The grid itself has columns for Item, Lot Number, Order Qty., UOM, Rcvd Qty., Ship Qty., Entered UOM, Entered Qty, and Ordered Item. A message "<No data to display>" is shown in the grid area. At the bottom of the screen, a footer message reads "LINUX2TEST Facility ZET (Last Update by [redacted] at [redacted])".

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.

**Wave Planning Order Select for Facility ZET**

Criteria - 1 Criteria - 2 Where Clause Results Options Auto Release

Description: **I-All**

Customer ID: AGCALJAM Scheduled Ship Dates From: (All) (Current Date +/- -999 Days)

Ship To: (All) (Current Date +/- 999 Days)

State/Province: (All) (Current Date +/- -999 Days)

Postal Code: (All) (Current Date +/- 999 Days)

Carrier: Item: Load: MaxTotal Quantity: 0

Delivery Service Code: Order ID:

Order Type:  Include  Exclude

Order Priority:  Include  Exclude

Product Group:  Include  Exclude

Shipment Type:  Include  Exclude

From Lot Number: To Lot Number: Single SKU Only

Active Line-Item Count: From: To:

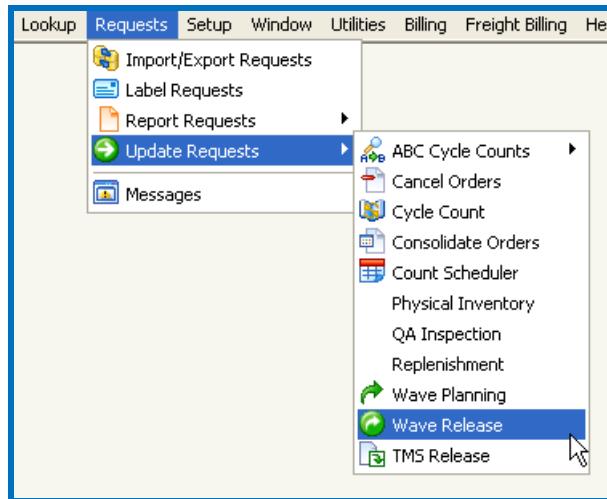
Process Commit... Hold Ship Short Excluded Included Hazardous HOT

Facility ZET (Last Update by ANN at 10/11/2013 10:59:53 AM)

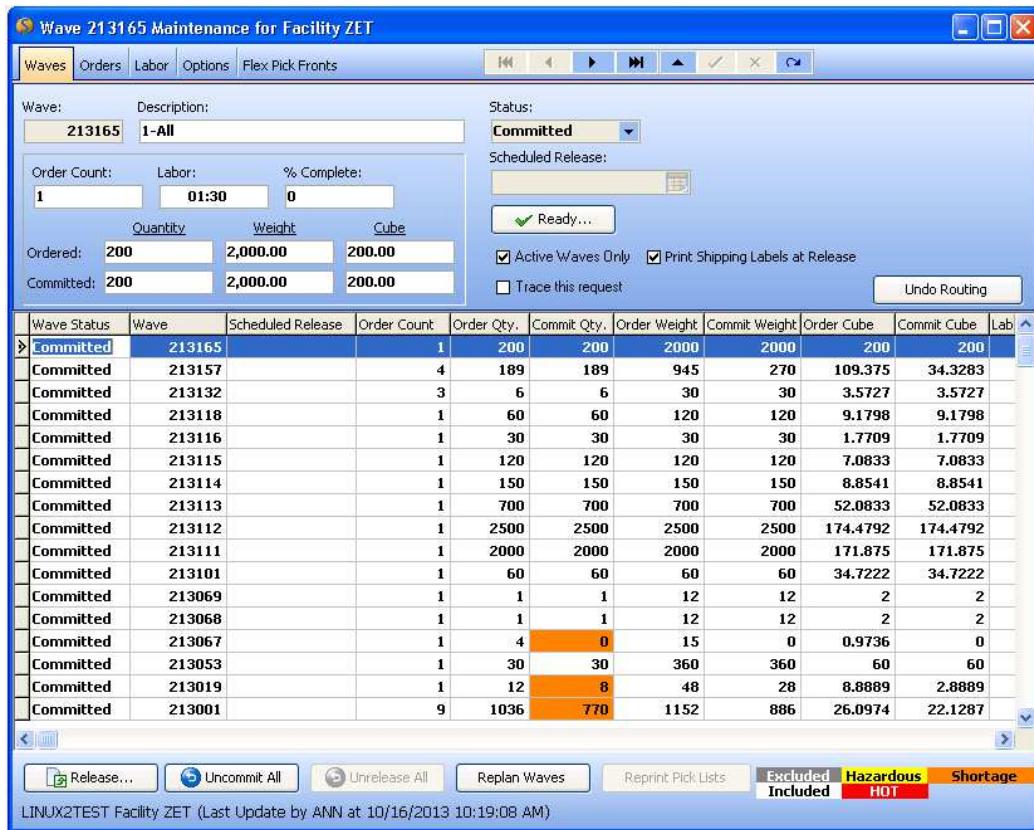
## Wave Release and Task Generation

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

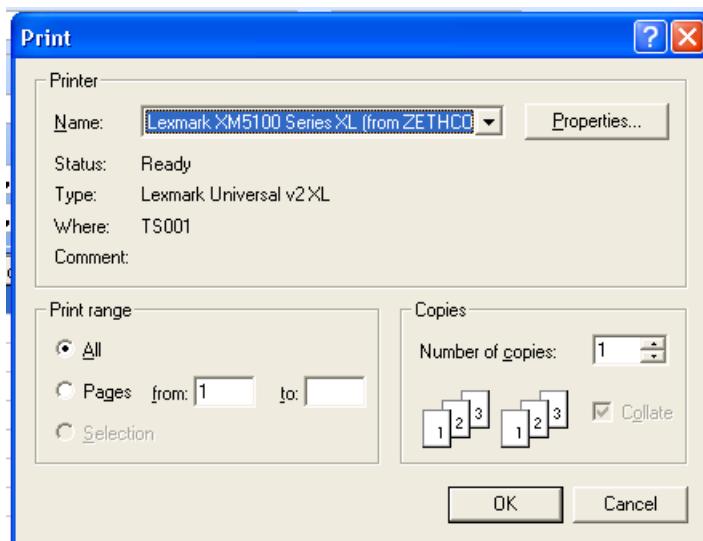
- You do not get wave screen control back until all pick tasks have been created by the background task that generates the picks (genpicks). The system waits for genpicks to finish so that "like" picks (i.e. same customer, item, lot, uom and location) can be combined and the data is available for printing 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.



- 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.



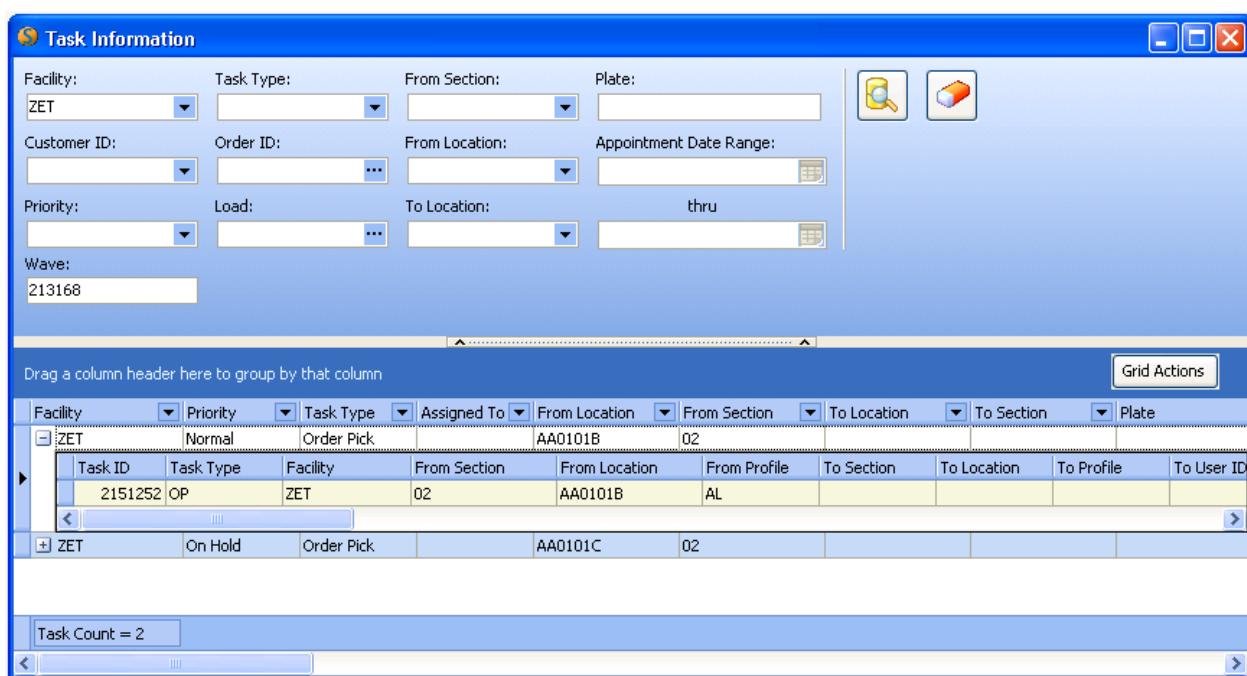
Note: If labels are set up for the customer, a window appears so that you can enter the number of labels required.

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.



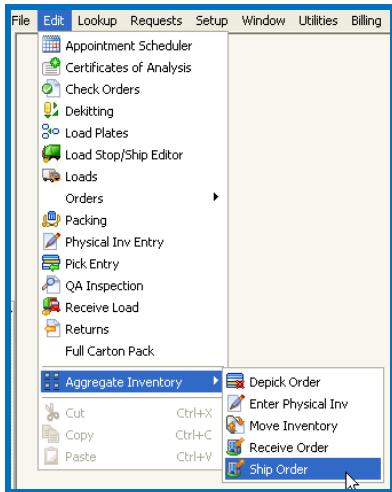
The screenshot shows the 'Task Information' window with the following details:

- Search Fields:** Facility (ZET), Task Type (dropdown), From Section (dropdown), Plate (text box), Customer ID (dropdown), Order ID (dropdown), From Location (dropdown), Appointment Date Range (calendar), Priority (dropdown), Load (dropdown), To Location (dropdown), and Wave (text box containing 213168).
- Grid Actions:** A button labeled 'Grid Actions' is located in the top right corner of the grid area.
- Grid Headers:** Facility, Priority, Task Type, Assigned To, From Location, From Section, To Location, To Section, Plate.
- Grid Data:**

Facility	Priority	Task Type	Assigned To	From Location	From Section	To Location	To Section	Plate		
ZET	Normal	Order Pick		AA0101B	02					
		Task ID	Task Type	Facility	From Section	From Profile	To Section	To Location	To Profile	To User ID
		2151252	OP	ZET	02	AA0101B	AL			
- Bottom Bar:** 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.

A screenshot of the 'Ship Order' screen. The title bar says 'Ship Order'. The screen is divided into sections: 'Header' on the left, 'Trailer Temperatures' in the center, and 'Item Details' on the right. In the 'Header' section, there is a 'Order ID:' field with a lookup button, a 'Total to Pick:' field, and a 'Pick' button. Below these are fields for 'Stage Location:', 'Door Location:', 'Carrier:', 'Bill of Lading:', 'Trailer:', 'Seal:', 'Actual Ship Date:' (set to 10/16/2013), and 'Pro Number:'. A 'Print Labels' button is also present. In the 'Trailer Temperatures' section, there are three input fields labeled 'Nose:', 'Middle:', and 'Tail:'. In the 'Item Details' section, there is a table with columns: Line #, Item, Receipt, Location, Quantity, Base UOM, and Alternate UOM. The table has one empty row.

- 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.

The screenshot shows the 'Ship Order' window. At the top left is the 'Header' section with 'Order ID: 370261' and a double-click icon. To its right are fields for 'Door Location', 'Carrier: ABF', 'Bill of Lading', 'Trailer', 'Seal', 'Actual Ship Date: 10/16/2013' (with a print icon), 'Pro Number', and 'Pick & Ship'. Below the header is a 'Print Labels' button. A 'Trailer Temperatures' section includes fields for 'Nose', 'Middle', and 'Tail'. The 'Item Details' section contains a table with four rows:

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Alternate 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)

Below the table is a 'Required Pallet Tracking' section with 'Pallet Type' dropdown, 'Qty In: 0', and '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.

The screenshot shows the 'Ship Order' application window. In the 'Header' section, 'Order ID' is set to 370265, 'Stage Location' is empty, 'Door Location' is empty, 'Carrier' is ABF, and 'Bill of Lading' is empty. 'Released' is marked, and 'Total to Pick' is 140. Buttons include 'Pick' (highlighted), 'Print Labels', and 'Pick & Ship'. In the 'Item Details' section, there is a table with three rows:

Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Alternate UOM
1	1001	312506101	370258	AA0101B	20	CS	(2 Pallet)
2	1002	328908008	370259	AA0102A	100	CS	(5 Pallet)
3							(N/A)

Below the table is a 'Required Pallet Tracking' section with a dropdown for 'Pallet Type' and input fields for 'Qty In' (0) and 'Qty Out' (0).

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



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

The screenshot shows the 'Ship Order' application window. In the 'Header' section, the 'Order ID' is 370265, 'Stage Location' is STG17, 'Door Location' is empty, 'Carrier' is ABF, 'Bill of Lading' is empty, 'Trailer' is empty, 'Seal' is empty, 'Actual Ship Date' is 10/16/2013, 'Pro Number' is empty, and 'Trailer Temperatures' fields for Nose, Middle, and Tail are empty. There is a 'Print Labels' button. Below the header is a table of 'Item Details' with two rows:

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

In the 'Required Pallet Tracking' section, 'Pallet Type' is empty, 'Qty In' is 0, and 'Qty Out' is 0. A 'Ship' button is located at the bottom right of the main window area. A 'Confirm' dialog box is overlaid on the window, asking 'Okay to Ship Order 370265?' with 'Yes' and 'No' buttons.

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 1<sup>st</sup> 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 **Ship**. A confirmation window appears:



- 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.

The screenshot shows the 'Ship Order' window with the following details:

**Header**

- Order ID: **370265** (with a dropdown arrow icon)
- Shipped: **80**
- Total Shipped: **80**
- Stage Location: **TR9871**
- Door Location: **DR44**
- Carrier: **ABF**
- Bill of Lading: **BL5740202**
- Trailer: **TR9871**
- Seal: [empty]
- Actual Ship Date: **10/16/2013** (with a calendar icon)
- Pro Number: [empty]
- Print Labels button
- Ship button
- 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** (dropdown menu)
- 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 1<sup>st</sup> 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 section. 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**

<b>Header</b>																															
Order ID: <b>370266</b>		Stage Location: <b>STG15</b>																													
<b>Released</b>	Door Location: <b>DR44</b>																														
Total to Pick <b>40</b>		Carrier: <b>ABF</b>																													
Bill of Lading: <b>BL05786960</b>																															
Trailer:																															
<b>TR8767</b>																															
Seal:																															
Actual Ship Date: <b>10/16/2013</b>																															
Pro Number: 																															
Trailer Temperatures																															
Nose:	Middle:	Tail:																													
<b>Print Labels</b>																															
<b>Item Details</b>																															
<table border="1"> <thead> <tr> <th>Line #</th> <th>Item</th> <th>Lot Number</th> <th>Receipt</th> <th>Location</th> <th>Quantity</th> <th>Base UOM</th> <th>Alternate UOM</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1002</td> <td>32890808</td> <td>370259</td> <td>AA0102A</td> <td>40</td> <td>CS</td> <td>(2 Pallet)</td> </tr> <tr> <td>2</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>(N/A)</td> </tr> </tbody> </table>								Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Alternate UOM	1	1002	32890808	370259	AA0102A	40	CS	(2 Pallet)	2							(N/A)
Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Alternate UOM																								
1	1002	32890808	370259	AA0102A	40	CS	(2 Pallet)																								
2							(N/A)																								
<b>Required Pallet Tracking</b>																															
Pallet Type: <b>Chep Pallet</b>	Qty In: <b>0</b>	Qty Out: <b>2</b>																													

- Click . A confirmation window appears:



- 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:

Pick & Ship

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**

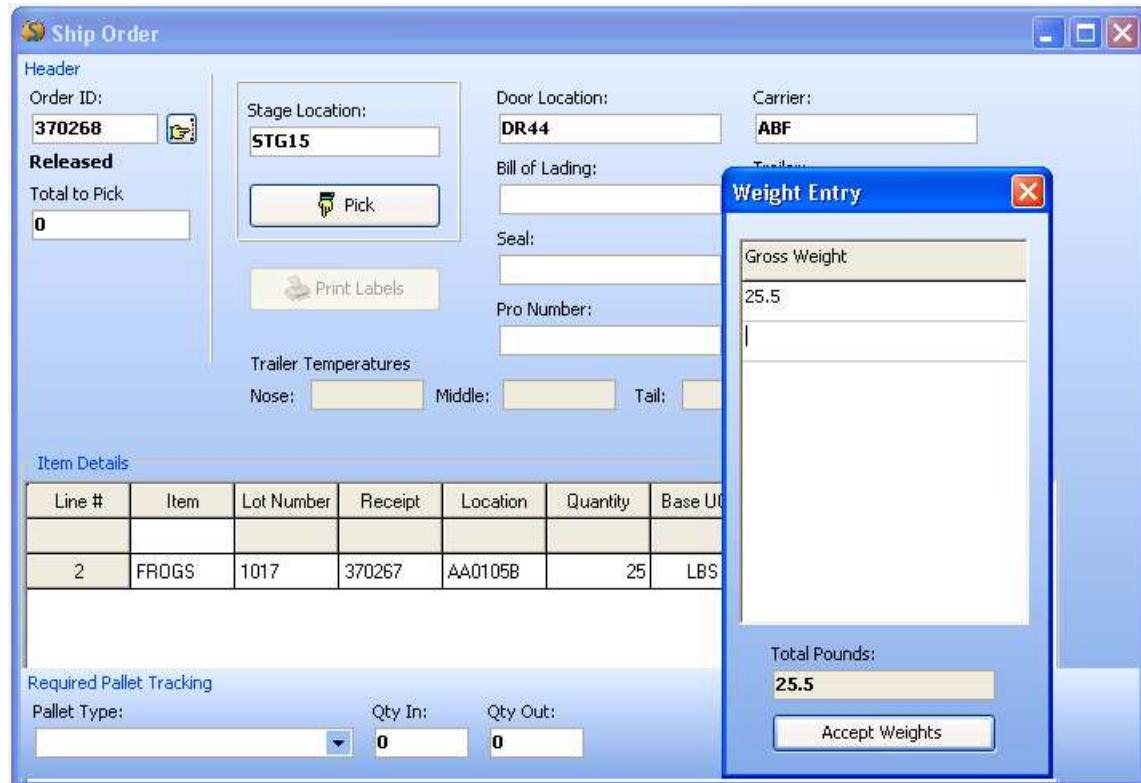
## Picking Options

### 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 .



### **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 ACCALJAM-Aggregate California Distribution**

Name	Receiving	Shipping	Billing	Dictionary	Labeling	Facility Settings	Handling	Trading Partners		
Customer ID: <b>AGCALJAM</b>	Status: <b>Active</b>	Rates	Groups	Items						
Name: <b>Aggregate California Distribution</b>	Phone: <b>902-575-668</b>	Consumables Owner:								
Lookup: <b>AGGREGATE CALIFORNIA DISTRIBUTION</b>	FAX:	<input type="checkbox"/> Use Expanded WebSynapse fields								
Contact: <b>Arnold Fink</b>	E-Mail:	<input type="checkbox"/> Suppress Anniversary Date <input checked="" type="checkbox"/> Aggregate Inventory <input type="checkbox"/> Require Cycle Count Item								
Address: <b>98765 American Way</b>	Primary CSR:	<input type="checkbox"/> Use Labels <input type="checkbox"/> Require Cycle Count Lot								
City: <b>Liberty</b>	State/Province: <b>CA</b>	<input type="checkbox"/> Allow Extra Picking <input checked="" type="checkbox"/> Require Physical Inventory Item								
Postal Code: <b>99942</b>	Country: <b>USA</b>	<input type="checkbox"/> Bill For Pallets <input type="checkbox"/> Require Physical Inventory Lot								
Master Account:	Manufacturer UCC Code:	Recent Order Days:	Min O-Qty Weight:	Reduce Order Qty By Cancel Amount:						
				<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Warn	<input type="radio"/> Hold	<input type="radio"/> Yes	<input type="radio"/> No	<input checked="" type="radio"/> Default
Unique Order Identifier:										
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 1:49:10 PM)

### 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**

<b>Header</b>									
Order ID: <b>370268</b>	<input type="button" value="Print"/>	Stage Location: <b>STG15</b>	<input type="button" value="Pick"/>	Door Location: <b>DR44</b>	Carrier: <b>ABF</b>	Bill of Lading:	Trailer: <b>TR55858</b>		
Released	Total to Pick <b>0</b>	Seal:	Actual Ship Date: <b>10/17/2013</b>	Pro Number:	<input type="button" value="Pick &amp; Ship"/>				
		Trailer Temperatures		Nose:	Middle:	Tail:			
<b>Item Details</b>									
Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Weight - Lbs	Alternate UOM	
2	FROGS	1017	370267	AA0105B	25	LBS		(N/A)	

**Required Pallet Tracking**

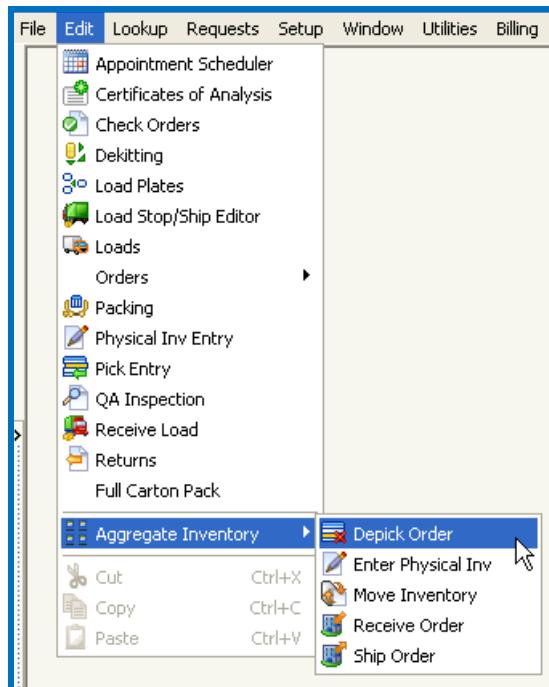
Pallet Type: Qty In: Qty Out:  
0 0

- 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:	Customer ID:			
370261	Picking Complete AGCALJAM			
<b>Depick Detail</b>				
Item:	Lot #:	Receipt:	Quantity:	Unit Of Measure:
1002	31250709		50	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:

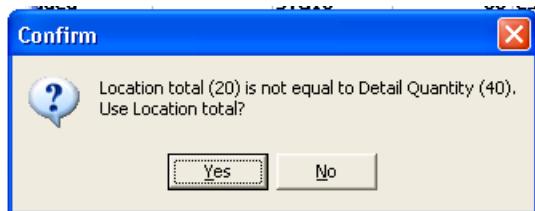
**Locations for Item 1001**

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.

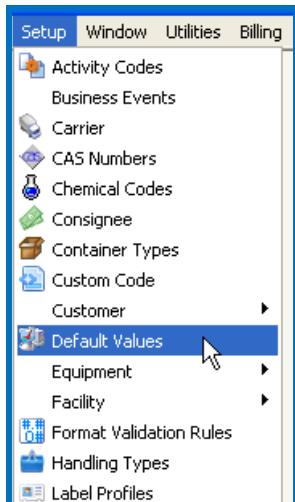
- Continue to depick the quantities required.

## 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	Value	Last User	Last Update
PICKLISTREPORT	\PaperPicking\AggrInv_Pick(ZPAPAGPCKTK).rpt		
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\picketicket(ZPAPPCKTK).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(ZRECPONFMNLNG).rpt	SWINCHELL	3/17/2010 9:55:34 AM
PURGEAUTOUNLOCK	NO	SYSTEM	1/1/2000
DATAFILECOMMITMENT	PN	1STADMVK	8/6/2010 5:24:01 PM

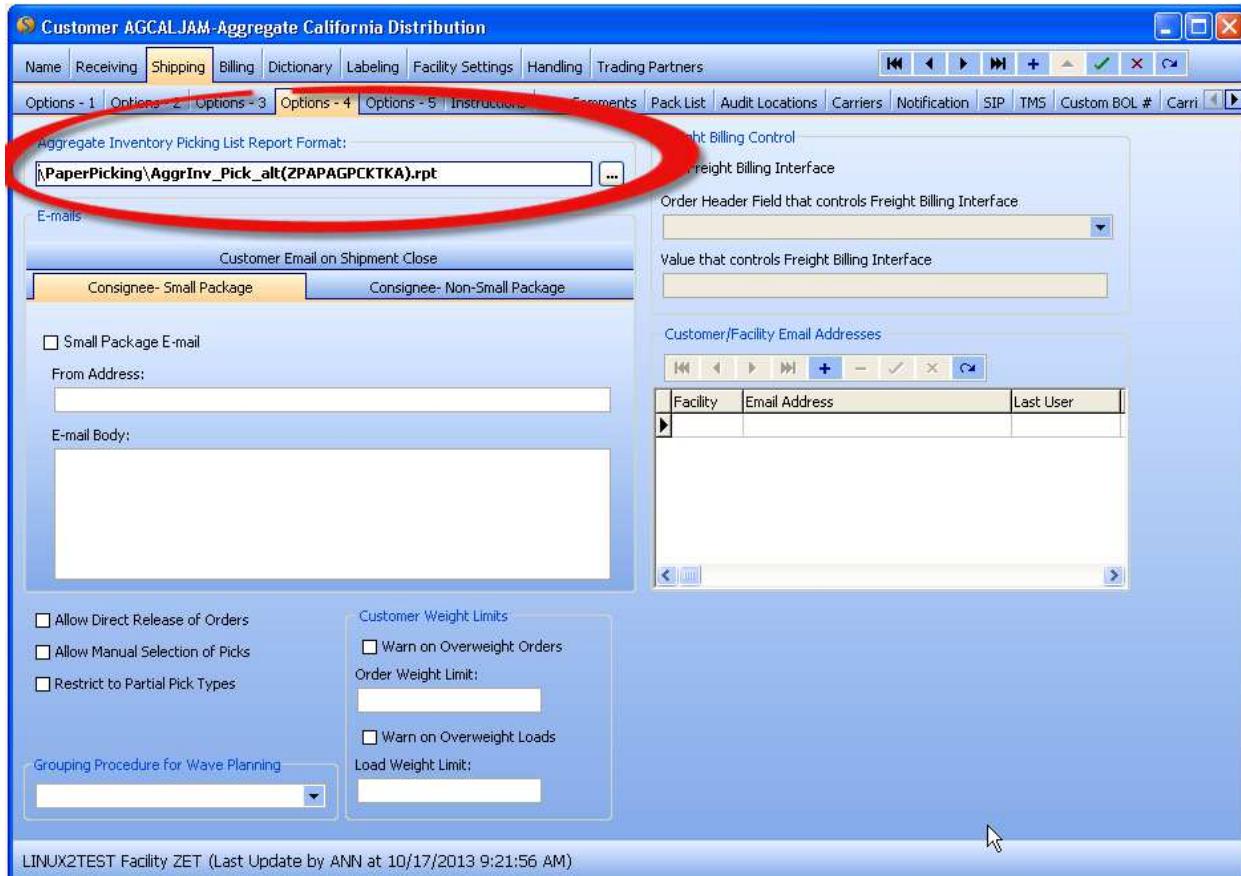
LINUX2TEST Facility ZET (Last Update by SWINCHELL at 3/17/2010 9:55:21 AM)

- 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.



## Sample Report

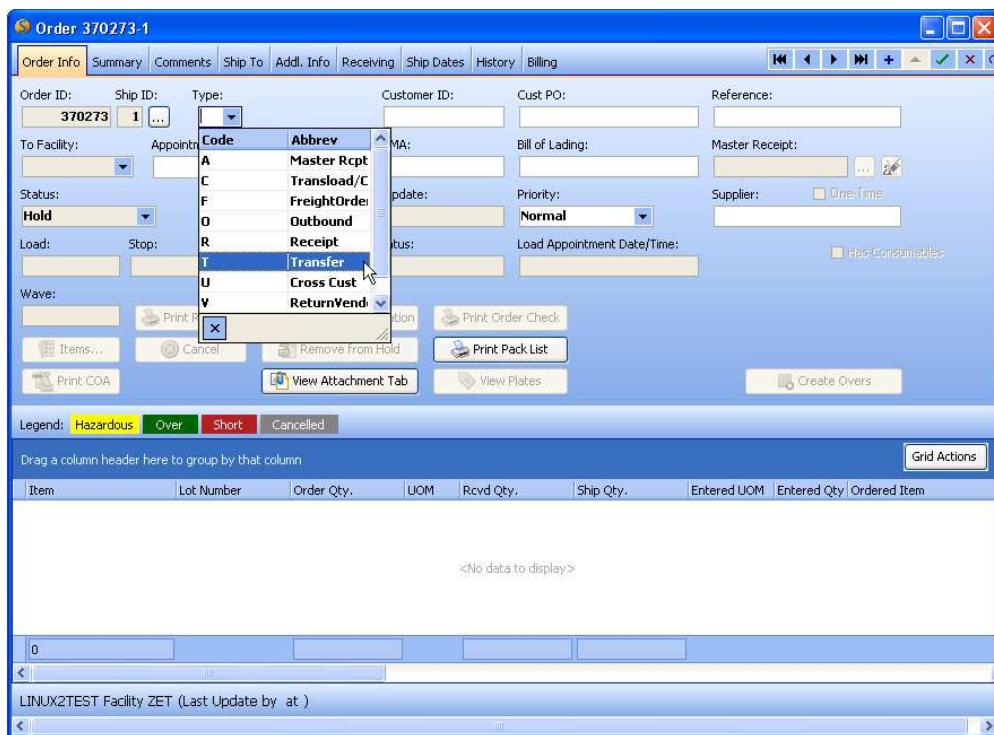
<b>Aggregate Inventory Pick Ticket</b>						<b>SYNAPSE</b>		
Zethcon Test								
Printed on 10/17/2013 10:48AM								
						Order: 370261-1 Task: 2151252 Wave: 213168		
<b>Facility:</b>	ZET	Zethcon Corporation	<b>Ship To:</b>	MUTCHLER				
<b>Cust:</b>	AGCALJAM	Aggregate California Distribution		RD 189, KM 3.3				
<b>Reference</b>	REF3424							
<b>P.O.:</b>	PO8475			GURABO		RI		00778
<b>Carrier</b>	ABF			PRI				
<b>Entry Date:</b>	10/16/2013 10:15:14		<b>Ships:</b>					
<b>Item</b>	<b>Item Description</b>	<b>Location</b>	<b>Receipt</b>	<b>Base Qty</b>	<b>Base UOM</b>	<b>Pick Qty</b>	<b>Pick UOM</b>	<b>LOT</b>
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.



- 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: <b>370276</b>	Ship ID: <b>1</b>	Type: <b>T</b>	Customer ID: <b>AGCALJAM</b>	Cust PO: <b>PO1928</b>	Reference: <b>REF# 9</b>																									
To Facility: <b>DMJ</b>	Appointment Date/Time: <b>10/21/2013</b>		RMA:	Bill of Lading: <b>BL09876</b>																										
Status: <b>Hold</b>	Status by: <b>ANN</b>		Status Update:	Priority: <b>Normal</b>	Shipper: <input checked="" type="checkbox"/> One-Time																									
Load:	Stop:		Shipment:	Load Status:	Load Appointment Date/Time:					<input type="checkbox"/> Has Consumables																				
Wave: <input type="button" value="Print Receiver"/> <input type="button" value="Reprint PO Confirmation"/> <input type="button" value="Print Order Check"/> <input type="button" value="Items..."/> <input type="button" value="Cancel"/> <input type="button" value="Remove from Hold"/> <input type="button" value="Print Pack List"/> <input type="button" value="Print COA"/> <input type="button" value="View Attachment Tab"/> <input type="button" value="View Plates"/> <input type="button" value="Create Overs"/>																														
Legend: <span style="background-color: yellow;">Hazardous</span> <span style="background-color: green;">Over</span> <span style="background-color: red;">Short</span> <span style="background-color: grey;">Cancelled</span>																														
<input type="button" value="Grid Actions"/>																														
<table border="1"> <thead> <tr> <th>Item</th> <th>Lot Number</th> <th>Order Qty.</th> <th>UOM</th> <th>Rcvd Qty.</th> <th>Ship Qty.</th> <th>Entered UOM</th> <th>Entered Qty</th> <th>Ordered Item</th> <th></th> </tr> </thead> <tbody> <tr> <td colspan="9">&lt;No data to display&gt;</td> <td></td> </tr> </tbody> </table>											Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Ordered Item		<No data to display>									
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 )																														
< >																														

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

**Plate Lookup**

License Plate:	Facility:	Lot Number:	Location:	Expires by:																						
	ZET				<input type="button" value="Search"/>	<input type="button" value="New"/>																				
Customer ID:	QC Control ID:	Serial Number:	To Location:	Status Update:																						
AGCALJAM																										
Item:	Inventory Class:	Receipt Order ID:	Inbound Load:																							
Plate Status:	Inventory Status:	Product Group:	User 1																							
Legend: <span style="background-color: green;">QC Hold</span> <span style="background-color: blue;">In Transit</span> <span style="background-color: red;">Deleted</span>																										
Adjustment Reason: <input type="button" value="Enter Adjustment Reason"/>				Customer Reference: <input type="button" value="Customer Reference"/>																						
<small>* represents Clickable column header for location</small>																										
<table border="1"> <thead> <tr> <th>Master Pallet Label</th> <th>License Plate</th> <th>Customer *</th> <th>Item *</th> <th>Item Description</th> <th>Quantity</th> <th>Inv. Status *</th> <th>Facility</th> <th>Location *</th> <th>LIP Status</th> </tr> </thead> <tbody> <tr> <td colspan="10">&lt;No data to display&gt;</td> </tr> </tbody> </table>							Master Pallet Label	License Plate	Customer *	Item *	Item Description	Quantity	Inv. Status *	Facility	Location *	LIP Status	<No data to display>									
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0 < >																										

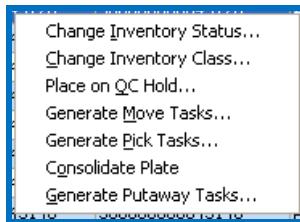
## Selecting Stock and Generating Picks

- 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.

The screenshot shows the 'Plate Lookup' window. At the top, there are search fields for License Plate (ZET), Customer ID (AGCALJAM), Item (1001), and Plate Status (AV). On the right, there are buttons for 'Multi-Plate Options' (radio buttons for 'All Plates', 'Multi-Plates Only', and 'Exclude Multi-Plates'), 'Show Picked and Deleted Plates', and a 'Record Limit' dropdown set to 'All'. Below the search area is a legend with 'QC Hold', 'In Transit', and 'Deleted' buttons. An 'Adjustment Reason' dropdown and a 'Customer Reference' input field are also present. The main area is a grid titled 'Drag a column header here to group by that column' with columns: Master Pallet Label, License Plate, Customer \*, Item \*, Item Description, Quantity, Inv. Status \*, Facility, Location \*, LIP Status. The grid contains several rows of data, each with a checkbox in the first column.

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

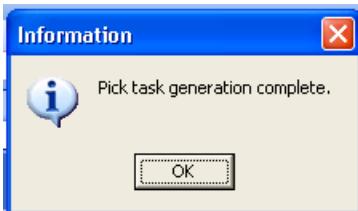
- To select a plate to ship, click on the plate in the grid.
- Right click to display the Options window. Select the Generate Pick Tasks option.



- 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

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

LINUX2TEST Facility ZET (Last Update by ANN at 10/18/2013 10:30:19 AM)

## 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

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

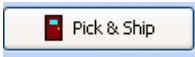
Pallet Type: Qty In: Qty Out:

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

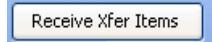
- Once all of the fields have been updated, click the Pick & Ship button  to ship the order. A confirmation window appears. Click Yes.

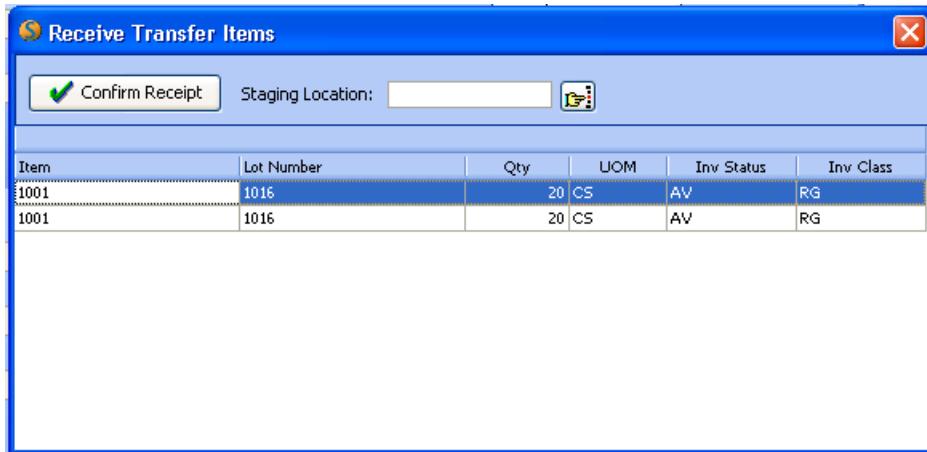
Note: If you want to pick the transfer without immediately shipping it, click the Pick button.

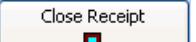
## Receive Order

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.



- 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.



- 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.

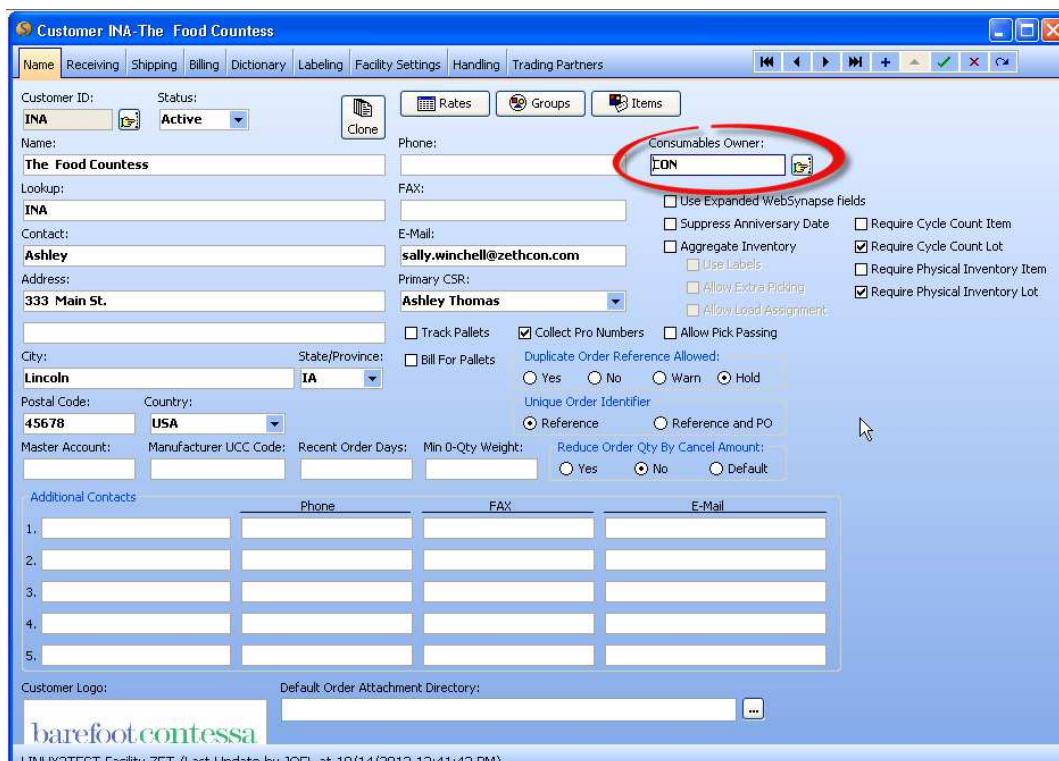
## Using an Aggregate Inventory Customer for Consumables Processing

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.



## 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:	Ship ID:	Type:	Customer ID:	Cust PO:	Reference:																								
370243	1	0	INA	P057588	932547																								
To Facility:	Appointment Date/Time:	RMA:	Bill of Lading:																										
	10/14/2013																												
Status:	Status by:	Status Update:	Priority:	Shipper:	<input type="checkbox"/> One Time																								
Entered	ANN	10/11/2013 1:11:19 PM	Normal																										
Load:	Stop:	Shipment:	Load Status:	Load Appointment Date/Time:																									
					<input checked="" type="checkbox"/> Has Consumables																								
<input type="button" value="Print Receiver"/> <input type="button" value="Reprint PO Confirmation"/> <input type="button" value="Print Order Check"/> <input type="button" value="Items..."/> <input type="button" value="Cancel"/> <input type="button" value="Assign to load..."/> <input type="button" value="Print Pack List"/> <input type="button" value="Split Shipment"/> <input type="button" value="Duplicate Order"/> <input type="button" value="Print COA"/> <input type="button" value="View Attachment Tab"/> <input type="button" value="View Plates"/> <input type="button" value="Create Overs"/>																													
Legend: <span style="background-color: yellow;">Hazardous</span> <span style="background-color: green;">Over</span> <span style="background-color: red;">Short</span> <span style="background-color: blue;">Cancelled</span>																													
<input type="button" value="Grid Actions"/>																													
Drag a column header here to group by that column																													
<table border="1"> <thead> <tr> <th>Item</th> <th>Lot Number</th> <th>Order Qty.</th> <th>UOM</th> <th>Rcvd Qty.</th> <th>Ship Qty.</th> </tr> </thead> <tbody> <tr> <td>► APPLE</td> <td></td> <td>5</td> <td>Case</td> <td></td> <td>Case</td> </tr> <tr> <td>BUTTER</td> <td></td> <td>3</td> <td>Each</td> <td></td> <td>Each</td> </tr> <tr> <td>2</td> <td>8</td> <td>0</td> <td>0</td> <td>0</td> <td></td> </tr> </tbody> </table>						Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	► APPLE		5	Case		Case	BUTTER		3	Each		Each	2	8	0	0	0	
Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.																								
► APPLE		5	Case		Case																								
BUTTER		3	Each		Each																								
2	8	0	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**

Consumable Item:	From Location:	Quantity:																																				
BOXES	AA0101A	3																																				
Drag a column header here to group by that column																																						
<table border="1"> <thead> <tr> <th>Order ID</th> <th>Ship ID</th> <th>Facility</th> <th>Item</th> <th>From Location</th> <th>Qty</th> <th>Last User</th> <th>Last Update</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			Order ID	Ship ID	Facility	Item	From Location	Qty	Last User	Last Update																												
Order ID	Ship ID	Facility	Item	From Location	Qty	Last User	Last Update																															
<No data to display>																																						
<input type="button" value="0"/>																																						
Legend: <span style="background-color: yellow;">Hazardous</span> <span style="background-color: green;">Over</span> <span style="background-color: red;">Short</span> <span style="background-color: blue;">Cancelled</span>																																						
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<table border="1"> <thead> <tr> <th>Item</th> <th>Lot Number</th> <th>Order Qty.</th> <th>UOM</th> <th>Rcvd Qty.</th> <th>Ship Qty.</th> <th>Entered UOM</th> <th>Entered Qty</th> <th>Order</th> </tr> </thead> <tbody> <tr> <td>► APPLE</td> <td></td> <td>5</td> <td>Case</td> <td></td> <td>Case</td> <td>Case</td> <td>5</td> <td>APPLE</td> </tr> <tr> <td>BUTTER</td> <td></td> <td>3</td> <td>Each</td> <td></td> <td>Each</td> <td>Each</td> <td>3</td> <td>BUTTER</td> </tr> <tr> <td>2</td> <td>8</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Order	► APPLE		5	Case		Case	Case	5	APPLE	BUTTER		3	Each		Each	Each	3	BUTTER	2	8	0	0	0	0			
Item	Lot Number	Order Qty.	UOM	Rcvd Qty.	Ship Qty.	Entered UOM	Entered Qty	Order																														
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BUTTER		3	Each		Each	Each	3	BUTTER																														
2	8	0	0	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.

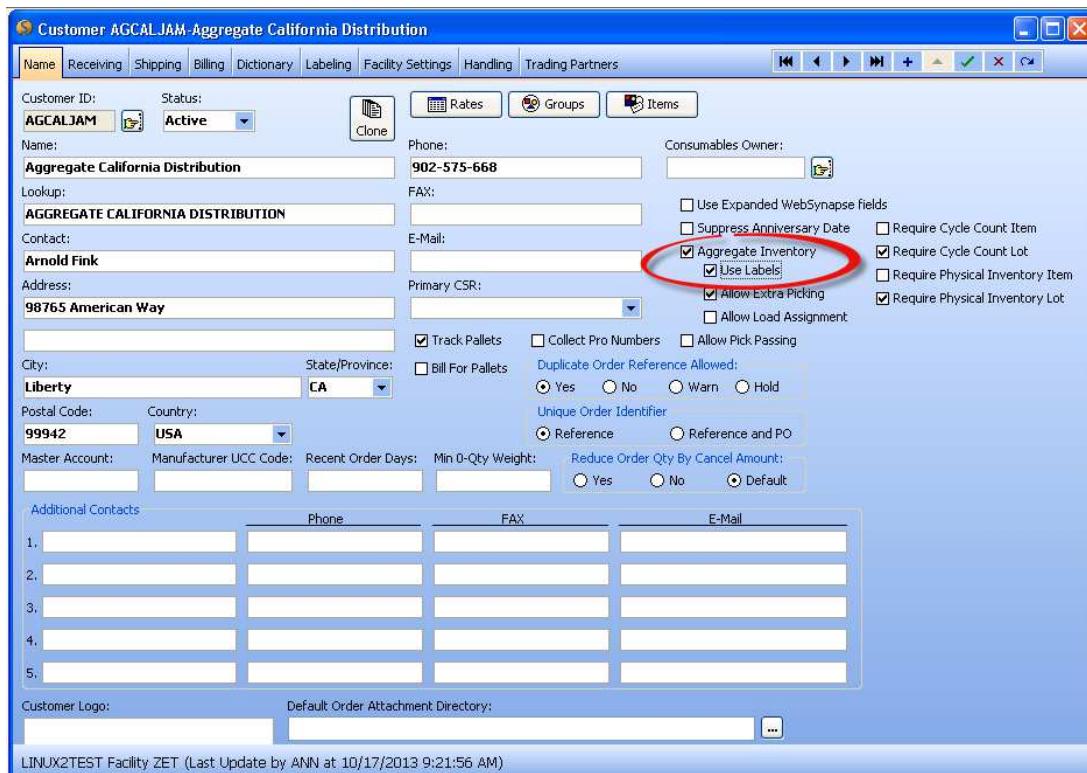
Note: Order changes such as de-picking, order cancellation, etc. will not change the Consumable Tracking entry. Inventory adjustments must manually be made to the consumables inventory at the aggregate inventory customer if the consumable inventory was not used.

## Label Print in Wave Release

### Customer Setup

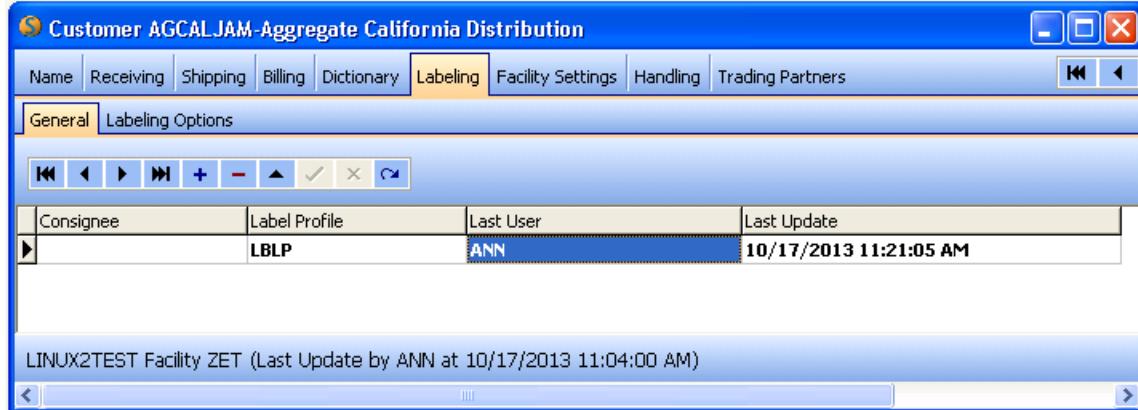
Labels can be printed along with the picking list at wave release. Labels can be set up specifically by customer. This will allow the print label prompt to only be displayed for the applicable customers.

- 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.

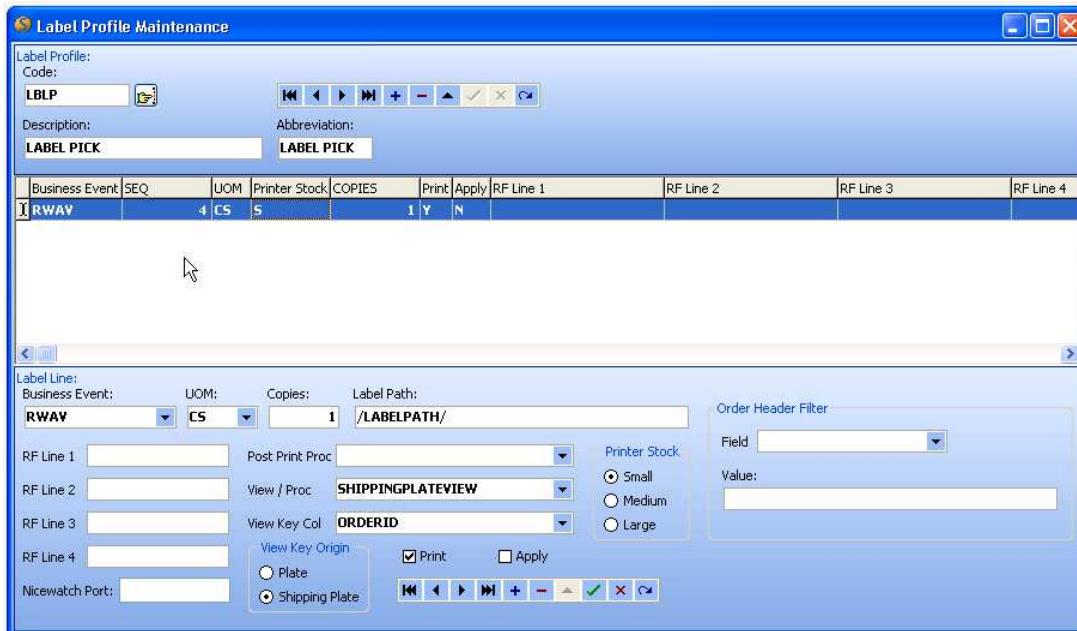
- Select a Label Profile (label format and parameters) that will be used for the customer.  
Note: you can select a different profile by Consignee if required.
- Check the Use Labels box. Click the save changes button .



## Label Profile Setup

The label profile should be associated with the RWA (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 RWA business event.

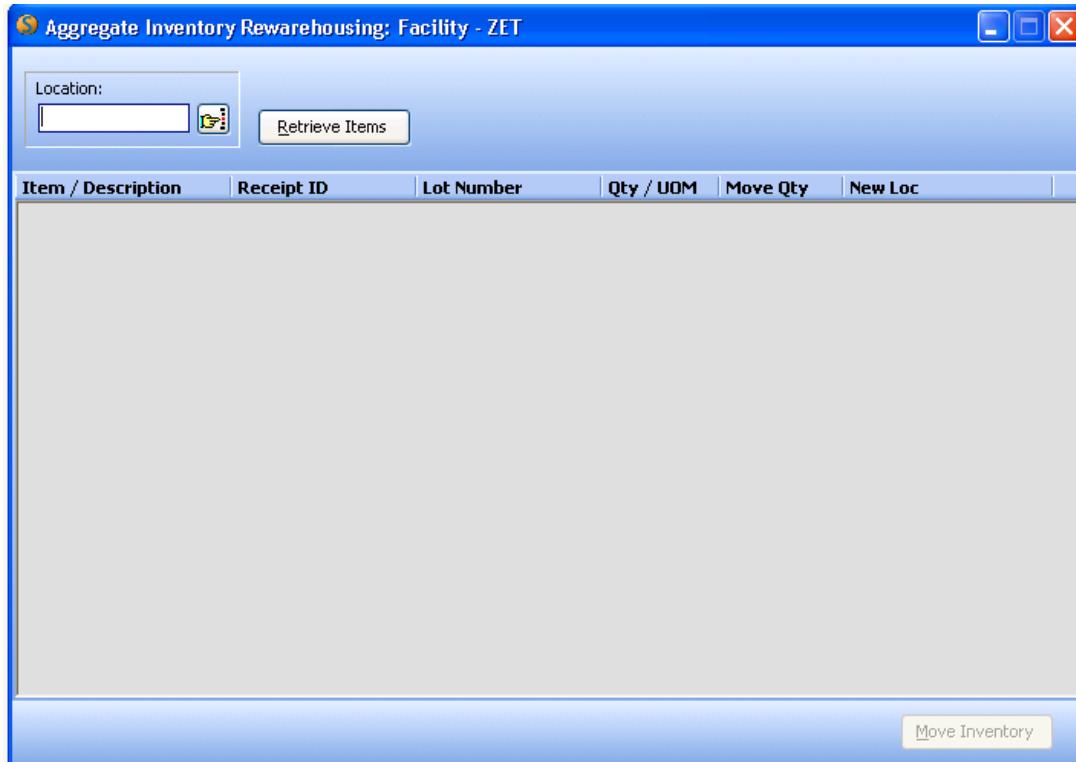


When the wave is released, after the report Print window, a window appears so that you can enter the number of labels requested.

## 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:



- 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 Rewarehousing: Facility - ZET**

Item / Description	Receipt ID	Lot Number	Qty / UOM	Move Qty	New Loc
1001 Divination Crystal Orb	370263	1016	20 CS	0	
1001 Divination Crystal Orb	370263	1016	20 CS	0	
1001 Divination Crystal Orb	370263	1016	20 CS	0	
1001 Divination Crystal Orb	370263	1016	20 CS	0	

**Move Inventory**

- 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.

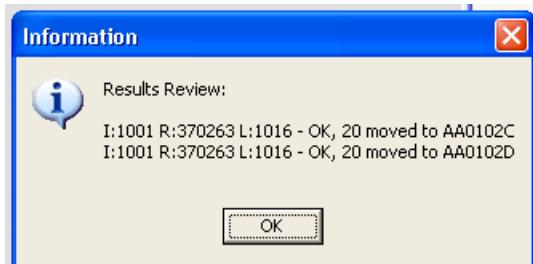
More than one move can be done at the same time. The Location Status of No Service and Location Type of Staging are not allowed.

**Aggregate Inventory Rewarehousing: Facility - ZET**

Item / Description	Receipt ID	Lot Number	Qty / UOM	Move Qty	New Loc
1001 Divination Crystal Orb	370263	1016	20 CS	20	AA0102C
1001 Divination Crystal Orb	370263	1016	20 CS	0	
1001 Divination Crystal Orb	370263	1016	20 CS	20	AA0102D
1001 Divination Crystal Orb	370263	1016	20 CS	0	

**Move Inventory**

- 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.

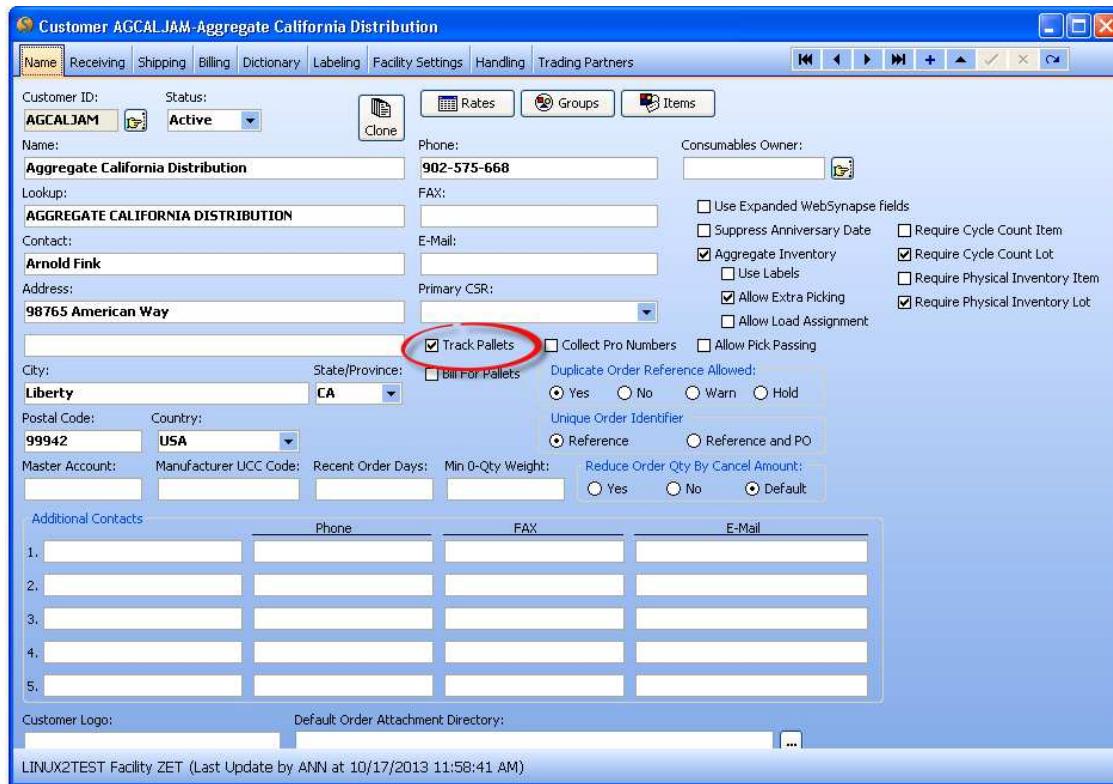
## Pallet Tracking

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

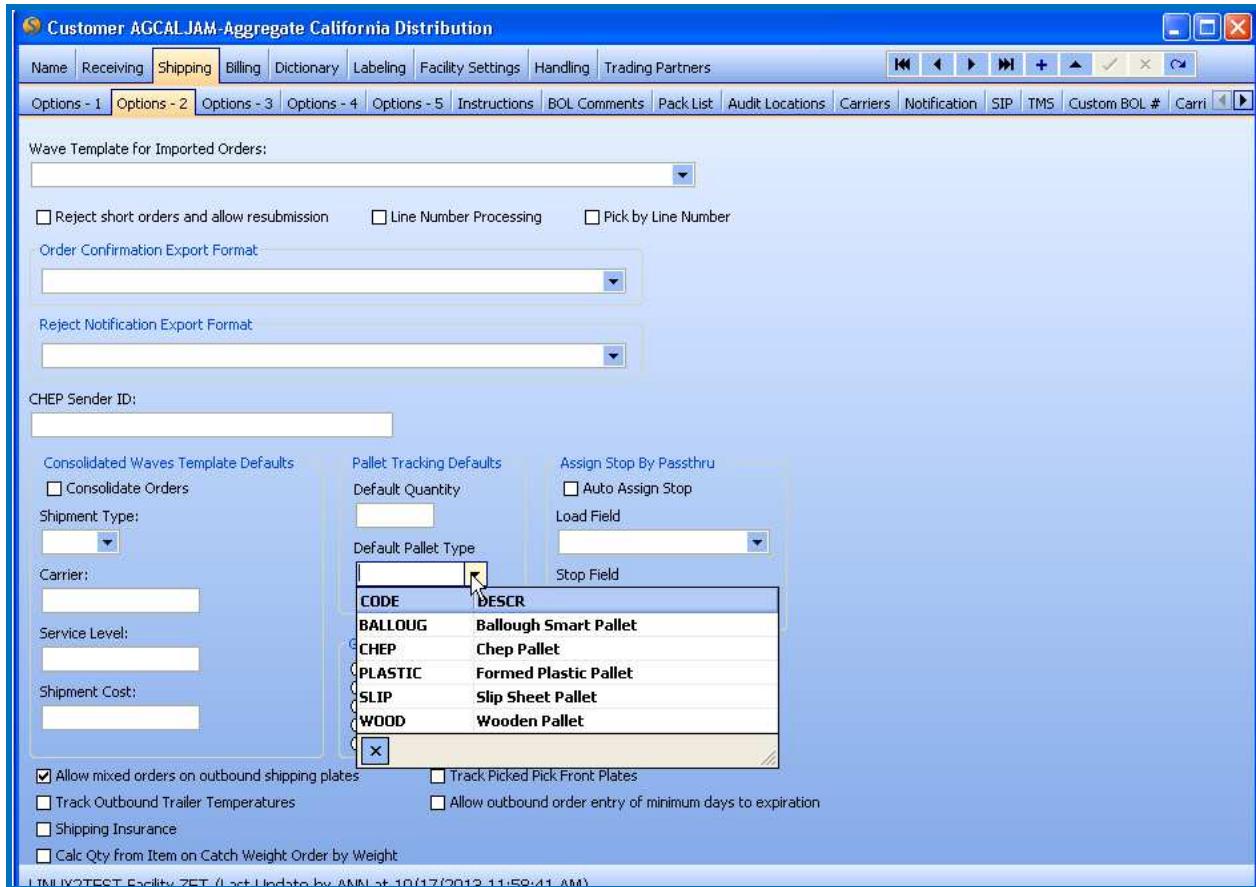
In order to use the pallet tracking function, the option must be activated on the Customer Maintenance screen.

- 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 .



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

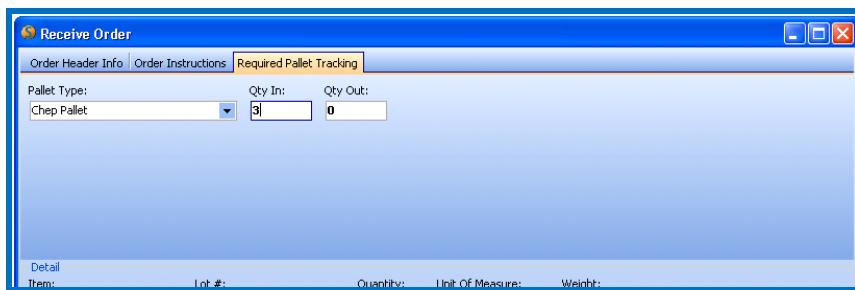
- Select the Shipping and Options 2 tab.
- You can set a:
  - Default Quantity – Defaults a pallet quantity for orders and receipts.
  - Default Pallet Type – Defaults a pallet type for orders and receipts. You can use the drop down box to select a pallet type.



## 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 from 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.



## 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.

The screenshot shows the 'Ship Order' application window. The 'Header' section includes fields for Order ID (370261), Stage Location (STG15), Door Location, Carrier (ABF), Total to Pick (120), Bill of Lading, Seal, Actual Ship Date (10/17/2013), and various buttons like 'Pick', 'Print Labels', and 'Pick & Ship'. The 'Item Details' section displays a table with four rows of data:

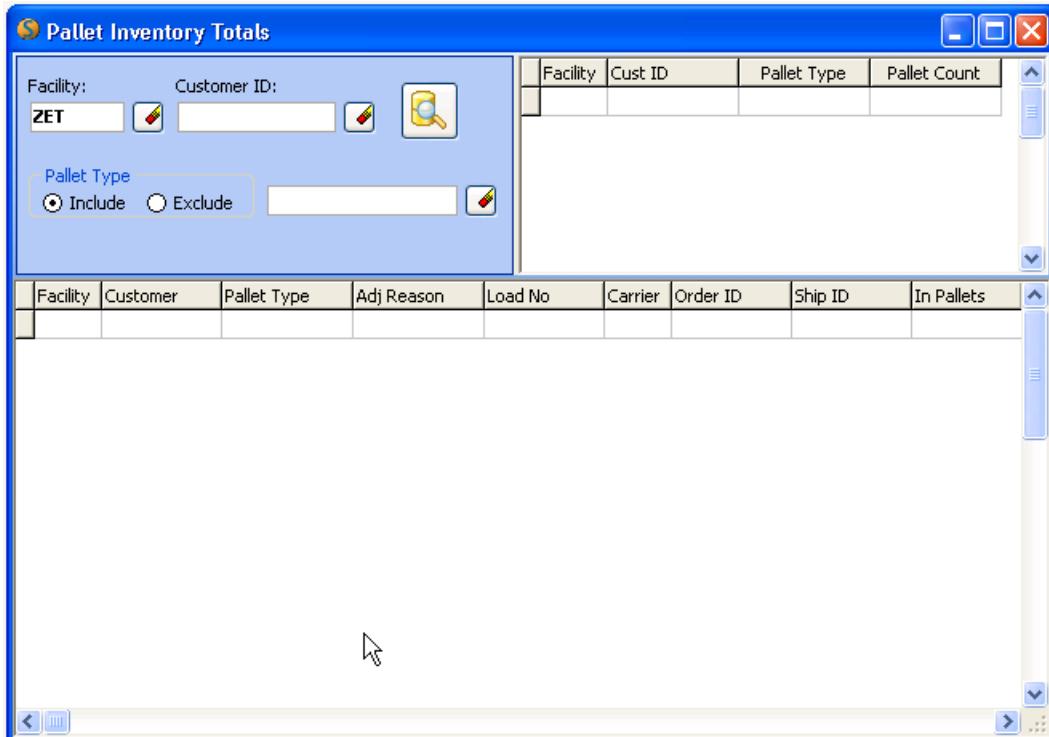
Line #	Item	Lot Number	Receipt	Location	Quantity	Base UOM	Alternate UOM
1	1001	312506101	370258	STG15	20	CS	(1 Pallet)
2	1002	31250709	370258	STG15	50	CS	(2 Pallet, 10)
3	1002	31250709	370258	STG15	50	CS	(2 Pallet, 10)
4							(N/A)

Below the table, there is a 'Required Pallet Tracking' section with fields for Pallet Type (Chep Pallet), Qty In (0), and 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:



- 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:

Facility	Customer	Pallet Type	Adj Reason	Load No	Carrier	Order ID	Ship ID	In Pallets	Out Pallets	Last Updated
ZET	AGCALJAM	( TOTAL )						20	0	5/7/2010 12:51:02 PM
ZET	AGCALJAM	WOOD						20	0	2/27/2012 10:09:14 PM
ZET	AGCALJAM	WOOD	Inbound	200825	3WAY	368478	1	2	0	8/13/2013 7:58:16 PM
ZET	AGCALJAM	WOOD	Outbound	201129	3WAY	369281	1	0	0	5/13/2013 7:55:21 PM
ZET	AGCALJAM	WOOD	Outbound	201604	3WAY	368477	1	0	0	10/16/2013 9:21:36 AM
ZET	AGCALJAM	WOOD	Inbound	201542	ABF	370049	1	1	0	10/16/2013 11:43:19 AM
ZET	AGCALJAM	WOOD	Inbound	201651	ABF	370259	1	3	0	10/16/2013 4:04:23 PM
ZET	AGCALJAM	WOOD	Inbound	201652	ABF	370263	1	15	0	10/17/2013 9:45:14 AM
ZET	AGCALJAM	WOOD	Outbound	201658	ABF	370265	1	0	4	10/17/2013 9:46:12 AM
ZET	AGCALJAM	WOOD	Inbound	201661	ABF	370267	1	5	0	10/17/2013 9:46:12 AM
ZET	AGCALJAM	WOOD	Outbound	201662	ABF	370268	1	0	1	10/17/2013 9:46:12 AM
ZET	AGCALJAM	WOOD	Outbound	201663	ABF	370268	1	0	1	10/17/2013 9:46:12 AM
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

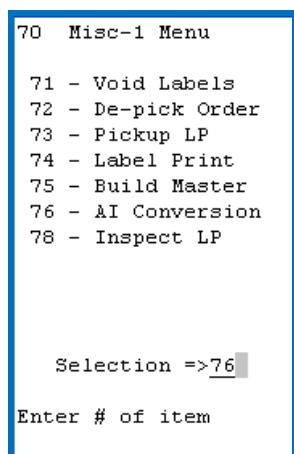
Before beginning this process, there is some preparation that needs to be done.

- 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 its 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.

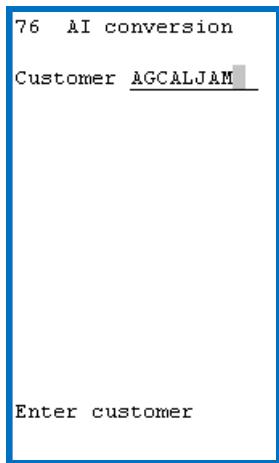
### RF Option 76 - AI Conversion

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.

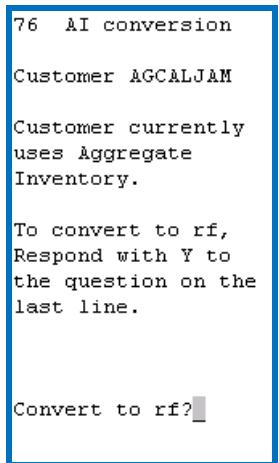


- Type the Customer ID number that you are converting in the Customer field and press Enter.



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.**



- 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  
AA0101B STO  
AA0101C STO  
AA0102A STO  
AA0102B STO  
AA0102C STO  
AA0102D STO  
AA0103A STO  
AA0103B STO  
AA0103C STO  
AA0104A STO  
AA0104B 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 AA0101B  
Item 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 AGCALJAM
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.