



# Infor LN Warehousing User Guide for Warehousing Procedures

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# About this document

## Objectives

The objectives of this book are to describe the purpose and the use of warehousing procedures.

## References

Use this guide as the primary reference for warehousing procedures. Use the current editions of these documents for information that is not covered in this guide:

- *User Guide for Warehouses*
- *User Guide for Warehousing Orders*
- *User Guide for the Inbound Goods Flow (U9788 US)*
- *User Guide for the Outbound and Shipments Goods Flows (U9794 US)*
- *User Guide for Warehousing Inspections (U9875 US)*
- *User Guide for Warehousing Quarantine Handling (U9876 US)*
- *Infor LN Warehousing - User Guide for Multisite*

## How to read this document

This document is assembled from online Help topics.

Text in italics followed by a page number represents a hyperlink to another section in this document.

Underlined terms indicate a link to a glossary definition. If you view this document online, clicking the underlined term takes you to the glossary definition at the end of this document.

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## Inbound and outbound procedures

In LN, user-definable warehousing procedures control the inbound, storage, and outbound goods flows in your warehouse.

A warehousing procedure includes various activities that determine the way goods are processed in the warehouse.

The warehousing inbound flow comprises the following default procedures:

- The Receipt Procedure
- The Inspection Procedure

The warehousing outbound flow comprises the following default procedures:

- The Outbound Procedure
- The Shipment Procedure

The outbound procedure can include outbound inspections, if required.

## Inbound and outbound processing of goods

To process the goods in LN, you can take either of the following steps:

- **Process the warehousing order lines that list the goods**  
If you process the warehousing order lines, by default, LN processes the goods according to the warehousing procedure that is linked to the warehouse order type of the warehousing order to which the order lines belong. For individual warehousing orders or order lines, you can modify the default warehousing procedure. For further information on defining and modifying warehousing procedures, see *To define warehousing procedures (p. 9)* and *How to modify warehousing procedures*.
- **Process the handling units that contain the goods**  
To process a handling unit, the handling unit must be linked to a warehousing order line. If you process a handling unit, the handling unit is processed according to the warehousing procedure of the warehousing order line. For each procedure step that a handling unit takes, the order lines are updated in the background.

Inbound goods are listed on inbound order lines, and outbound goods are listed on outbound order lines. Inbound and outbound order lines are generated from orders originating from other LN packages or are manually created in Warehousing. For more information, refer to Warehousing orders.

Depending on your data setup, handling units can be generated automatically for inbound or outbound goods, or you can generate or manually create handling units during any of the stages of the inbound and outbound goods flow.

You can view the progress of order lines or handling units during warehouse processing in the following sessions:

- Inbound Line Status Overview (whinh2119m000)
- Outbound Line Status Overview (whinh2129m000)
- Handling Unit Process Inbound (whinh2113m000)
- Handling Unit Process Outbound (whinh2123m000)

These sessions show the activities that have been performed for the order lines or the handling units, and show the next activity that you must perform. In addition, in these sessions you can perform activities that must be performed manually.

# Chapter 2

## Defining Warehousing Procedures

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### To define warehousing procedures

To model the inbound, storage, and outbound goods flows in your warehouse, you can define warehousing procedures in LN. A warehousing procedure includes various steps called activities that control the way warehousing orders and/or handling units are processed. An activity is performed using a particular LN session.

### Link warehousing procedures to inbound and outbound goods

Initially, you define a warehousing procedure and link this procedure to a particular warehousing order type. As a result, the warehousing procedure is the default procedure for the warehousing orders to which the order type is allocated, and the goods are processed according to the procedure of the order on which the goods are listed.

If you use handling units to process goods into and/or out of the warehouse, the goods are processed according to the warehousing procedure of the warehousing orders that list the goods contained in the handling units.

You can adjust the default procedure for individual warehousing orders and warehousing order lines of this warehousing order type. If you adjust the default procedure for an individual warehousing order of this order type, the adjusted procedure applies to the inbound and/or outbound order lines of the warehousing order. You can also adjust the warehousing procedure for an individual inbound or outbound order line.

### Automatic or manual execution of activities

You can specify whether an activity of a warehousing procedure must be carried out manually or automatically. Manually means that the user must perform the activity using the session related to the activity. Automatic means that the activity is carried out automatically after the preceding activity is finished. If the first activity is automatic for warehousing orders generated from orders originating from other packages, this activity is carried out the moment the warehousing order is generated.

However, to trigger warehouse processing for warehousing orders whose first activity is set to automatic processing and that are manually created or generated from Project, you must click Process.

The Process command is available in the following sessions:

- Warehousing Orders (whinh2100m000)
- Warehousing Order (whinh2100m100)
- Warehouse Manager Dashboard (whinh2300m000)
- Warehousing Assembly Orders (whinh2101m000)
- Inbound Order Lines (whinh2110m000)
- Outbound Order Lines (whinh2120m000)

## How to define a warehousing procedure

### Step 1: Define procedure

In the Warehousing Procedures (whinh0105m000) session, define the identification code, the description and the procedure type of the warehousing procedure. The following warehousing procedure types are available:

- **Receipt Procedure**  
This procedure controls the receipts of goods
- **Inspection Procedure**  
The inspection procedure controls the inspection of goods received at the warehouse.
- **Outbound Procedure**  
The outbound procedure controls the issue of goods. This procedure can include outbound inspections.
- **Shipment Procedure**  
The shipment procedure controls staging and shipping of goods.

### Step 2: Add activities to procedure

After you create a warehousing procedure, you must add activities to the procedure. To add activities, proceed as follows:

1. In the Activities by Procedure (whinh0106m000) session, in the **Warehousing Procedure** field, select the procedure to which you want to add activities. As a result, LN displays the available activities related to the procedure type of the warehousing procedure you just selected. For example, if you defined a receipt procedure in the Warehousing Procedures (whinh0105m000) session and select this receipt procedure in the Activities by Procedure (whinh0106m000) session, LN displays the available receipt activities.
2. To add an activity to the procedure, select the **Applicable** check box next to the activity. Note that most procedures have a few mandatory activities, such as Warehouse Receipt (whinh3512m000) in the **Receipt Procedure**, or Generate Outbound Advice (whinh4201m000)

session in the **Outbound Procedure**. Mandatory activities are pre-selected by LN and read-only. For further information, see **Applicable**.

3. To specify that the added activity must be carried out automatically, select the **Automatic** check box. If you do not select this check box, the user must manually trigger the activity.
4. For activities that involve printing documents, such as storage lists or shipping documents, in the **Output Device** field, select one of the output devices available in your organization.

### Step 3: Link procedure to Warehousing Order Type

To link the procedure to warehousing orders, in the Warehousing Order Types (whinh0110m000) session, link the warehousing procedure to a warehousing-order type. As a result, the warehousing procedure is the default procedure for the warehousing orders to which the order type is allocated.

### Step 4: Link Warehousing Order Type to Order Origin

To link the warehousing order type to order origins, in the Default Order Types by Origin (whinh0120m000) session, link the warehousing order type to an order origin. As a result, the warehousing order type (with the warehousing procedure previously allocated) is the default warehousing order type for warehousing orders generated from orders of the order origin to which the warehousing order type is linked.

#### Performance aspects

Keeping warehousing order line activities in your system after the warehousing order is closed results in considerable data growth. If you do not want to remove warehousing orders with status **Closed**, an alternative way to reduce the number of records in your system is to remove the order line activities of closed orders. To do this, in the Remove Warehousing Orders (whinh2250m000) session, select the **Line Activities of Closed Orders** check box.

## Examples of warehousing procedures

This topic shows a few examples of warehousing procedures that you can define to meet the requirements of your warehouse.

### Receipt Procedure

The simplest receipt procedure comprises only the mandatory activities, which, in addition, you can make LN perform automatically:

- Warehouse Receipt (whinh3512m000) If this activity is performed automatically, LN creates and confirms the receipt record.
- Generate Inbound Advice (whinh3201m000)
- Put Away Inbound Advice (whinh3203m000) (This activity is mandatory if you do not select the Generate Storage List (whinh3415m000) activity.)

More complex receipt procedures in your warehouse may require you to select more of the available activities of the Activities by Procedure (whinh0106m000) session and set these activities to manual performance in order to enable users to record any changes in quantities received, quantities stored, storage locations, and so on.

Of course, if your inbound goods flow includes inspections, you can also select the **Inspection Procedure**.

## Outbound Procedure

The simplest outbound procedure comprises only the mandatory activities, which, in addition, you can make LN perform automatically:

- Generate Outbound Advice (whinh4201m000) (mandatory)
- Release Outbound Advice (whinh4202m000) (mandatory)

More complex outbound procedures in your warehouse may require you to select more of the available activities of the Activities by Procedure (whinh0106m000) session and set these activities to manual performance in order to enable users to record any changes in quantities issued, pick locations, and so on.

### Note

In the Activities by Procedure (whinh0106m000) session, select the **Automatic** check box to make LN perform these activities automatically.

# Chapter 3

## Defining Warehousing Order Types

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### To define warehousing order types

Warehousing order types determine how warehousing orders are handled. Warehousing order types are classified by inventory transaction type. The inventory transaction type that you add to a warehousing order type determines the type of warehousing procedure that you can link to the warehousing order type. The activities that must be carried out in order to handle warehousing orders are, by default, determined by the warehousing procedures that are linked to the warehousing order types.

Warehousing order types are linked to warehousing orders when warehousing orders are generated from other packages or when you manually create a warehousing order in the Warehousing Orders (whinh2100m000) session.

### Define warehousing order types

In the Warehousing Order Types (whinh0110m000) session, you can specify warehousing order types for the following inventory-transaction types:

- **Receipt**  
Use a warehousing order type of inventory transaction type **Receipt** to receive goods in a warehouse. You can link a **Receipt Procedure** and, optionally, an **Inspection Procedure** to a warehousing order type of inventory transaction type **Receipt**.
- **Issue**  
Use a warehousing order type of inventory transaction type **Issue** to issue goods from a warehouse. You can link a **Outbound Procedure** and a **Shipment Procedure** to a warehousing order type of inventory transaction type **Issue** **Note:** LN allows you to modify the outbound order line data based on the value the **Allow Updating Outbound Order Lines upto and including** field is set to in the Warehousing Order Types (whinh0110m000) session.
- **Transfer**  
Use a warehousing order type of inventory transaction type **Transfer** to transfer goods between warehouses, locations, business partners, projects, or work centers.

You must link these procedures to a warehousing order type of inventory transaction type

**Transfer:**

- **Receipt Procedure**
- **Inspection Procedure**
- **Outbound Procedure**
- **Shipment Procedure**

A transfer involves either one or two warehouses. If items are transferred between two different warehouses, all activities of the warehousing procedures must be carried out. However, if a transfer takes place between two locations within the same warehouse, the receipt activities are not carried out. You can use transfer orders to define a replenishment system within a single warehouse. This system controls replenishment from bulk locations to pick locations.

**Note:** LN allows you to modify the outbound order line data based on the value the **Allow Updating Outbound Order Lines upto and including** field is set to in the Warehousing Order Types (whinh0110m000) session.

- Inspections in LN Quality are possible for warehouse orders having order origin **Transfer (Manual)** only if the QM Implemented parameter is selected for the order type **Warehouse Transfer** in the Quality Management Parameters (qmptc0100m000) session.
- **WIP Transfer**  
Use a warehousing order type of inventory transaction type **WIP Transfer** to transfer work from one costing work center to another.

## Default activities by procedure

For each type of warehousing procedure, various activities are available. For each type of warehousing procedure, the following list shows the available activities.

### Receipt Procedure

- Print Receipts (whinh3412m000)
- Warehouse Receipt (whinh3512m000) (mandatory) If this activity is performed automatically, LN creates and confirms the receipt record.
- Generate Inbound Advice (whinh3201m000) (mandatory)
- Generate Storage List (whinh3415m000)
- Storage List (whinh3525m100) If this activity is performed automatically, LN puts away the goods listed on the storage list.
- Put Away Inbound Advice (whinh3203m000) (This activity is mandatory if you do not select the Generate Storage List (whinh3415m000) activity.)

#### Note

The Generate Inbound Advice (whinh3201m000), Generate Storage List (whinh3415m000), and Storage List (whinh3525m100) activities are unavailable for warehouses without locations. For non-location controlled warehouses, LN skips the these activities and puts away the goods after the receipt of the goods is confirmed.

### Inspection Procedure

- Warehouse Inspections Overview (whinh3122m000) (mandatory)
- Generate Inbound Advice (whinh3201m000) (mandatory)
- Generate Storage List (whinh3415m000)

- Storage List (whinh3525m100) If this activity is performed automatically, LN puts away the goods listed on the storage list.
- Put Away Inbound Advice (whinh3203m000)

## Outbound Procedure

- Generate Outbound Advice (whinh4201m000) (mandatory)
- Release Outbound Advice (whinh4202m000) (mandatory)
- Generate Picking List (whinh4415m000)
- Picking List (whinh4525m100) If this activity is performed automatically, LN confirms picking of the goods listed on the picking list.
- Warehouse Inspections Overview (whinh3122m000)

## Shipment Procedure

- Freeze/Confirm Shipments/Loads (whinh4275m000) (mandatory)
- Print Bills of Lading (whinh4470m000)
- Print Packing Slips (whinh4475m000)
- Print Packing Lists (whinh4476m000)
- Print Delivery Notes (whinh4477m000)
- Print Shipping Manifest (whinh4478m000)

## Receipt activity settings

The following tables show the default settings for the **Applicable** and **Automatic** check boxes in the Activities by Inbound Order Line (whinh2114m000) session.

## Receipt Procedure

### Activity: Print Receipts (whinh3412m000)

Activities by Warehousing Order (whinh2104m000) Activities by Inbound Order Line (whinh2114m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected	Cleared	Cleared	Disabled	For cost or service items, which you would not normally print on a goods received note.
Selected	Cleared	Selected	Cleared	For physical items, cost, or service items that you must print on a goods received note.
Cleared	Cleared	Selected	Cleared	

### Activity: Warehouse Receipt (whinh3512m000)

The settings for the Warehouse Receipt (whinh3512m000) session activity are not changed when copied from the Activities by Warehousing Order (whinh2104m000) session to the Activities by Inbound Order Line (whinh2114m000) session.

**Activity: Generate Inbound Advice (whinh3201m000)**

**Activities by Warehousing** Activities by Inbound Order Line (whinh2114m000)  
**Order (whinh2104m000)**

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected; Selected this set- ting is read-only.	Selected	Selected	Selected	Both item and warehouse are location controlled.
Selected; Selected this set- ting is read-only.	Cleared	Cleared	Cleared	Item or warehouse are not location controlled.
Selected; Cleared this set- ting is read-only.	Selected	Cleared	Cleared	Both item and warehouse are location controlled.
Selected; Cleared this set- ting is read-only.	Cleared	Cleared	Cleared	Item or warehouse are not location controlled.

**Activity: Put Away Inbound Advice (whinh3203m000)**

**Activities by Warehousing** Activities by Inbound Order Line (whinh2114m000)  
**Order (whinh2104m000)**

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected	Selected	Selected	Selected	Both item and warehouse are location controlled.
Selected	Selected	Cleared	Cleared	Item or warehouse are not location controlled.

Selected	Cleared	Selected	Cleared	Both item and warehouse are location controlled.
Selected	Cleared	Cleared	Cleared	Item or warehouse are not location controlled.
Cleared	Cleared	Cleared	Cleared	

### Activity: Generate Storage List (whinh3415m000)

Activities by Warehousing Order (whinh2104m000) Activities by Inbound Order Line (whinh2114m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected	Cleared	Selected	Cleared	Both item and warehouse are location controlled.
Selected	Cleared	Cleared	Cleared	Item or warehouse are not location controlled.
Cleared	Cleared	Cleared	Cleared	
Selected	Selected	Selected	Selected	Both item and warehouse are location controlled.
Selected	Selected	Cleared	Cleared	Item or warehouse are not location controlled.

### Activity: Storage List (whinh3525m100)

Activities by Warehousing Order (whinh2104m000) Activities by Inbound Order Line (whinh2114m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected	Cleared	Selected	Cleared	Both item and warehouse are location controlled.

Selected	Cleared	Cleared	Cleared	Item or warehouse are not location controlled.
Cleared	Cleared	Cleared	Cleared	
Selected	Selected	Selected	Selected	Both item and warehouse are location controlled.
Selected	Selected	Cleared	Cleared	Item or warehouse are not location controlled.

If the **Applicable** check box is cleared, the **Automatic** check box is disabled. If you select the **Applicable** check box, the **Automatic** check box is enabled.

## Inspection activity settings

The following tables show the default settings for the **Applicable** and **Automatic** check boxes in the Activities by Inbound Order Line (whinh2114m000) session.

## Inspection Procedure

### Activity Put Away Inbound Advice (whinh3203m000)

**Activities by Warehousing Order (whinh2104m000)** Activities by Inbound Order Line (whinh2114m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected; Cleared this setting is read-only.		Selected	Cleared	Both item and warehouse are location controlled.

### Activity Put Away Inbound Advice (whinh3203m000)

**Activities by Warehousing Order (whinh2104m000)** Activities by Inbound Order Line (whinh2114m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected; Selected this setting is read-only.		Selected	Selected	Both item and warehouse are location controlled.
Selected; Selected this setting is read-only.		Cleared	Cleared	Item or warehouse are not location controlled.
Selected; Cleared this setting is read-only.		Selected	Cleared	Both item and warehouse are location controlled.
Selected; Cleared this setting is		Cleared	Cleared	Item or warehouse are not location controlled.

read-only.

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Cleared	Cleared	Cleared	Cleared
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#### Note

For the activities Generate Inbound Advice (whinh3201m000), Generate Storage List (whinh3415m000), and Storage List (whinh3525m100), see *Receipt activity settings (p. 16)*.

## Outbound activity settings

The following tables show the default settings for the **Applicable** and **Automatic** check boxes in the Activities by Outbound Order Line (whinh2124m000) session.

## Outbound Procedure

### Activity Generate Outbound Advice (whinh4201m000)

**Activities by Warehousing Order (whinh2104m000)** Activities by Outbound Order Line (whinh2124m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected; Selected this set- ting is read-only.		Selected	Selected	Physical item.
Selected; Cleared this set- ting is read-only.		Selected	Cleared	Physical item.
Selected; Cleared this set- ting is read-only.		Cleared	Cleared	Cost or service item.

### Activity Release Outbound Advice (whinh4202m000)

**Activities by Warehousing Order (whinh2104m000)** Activities by Outbound Order Line (whinh2124m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected; Selected this set- ting is read-only.		Selected	Selected	Physical item.
Selected; Cleared this set- ting is		Selected	Cleared	Physical item.

read-only.

Selected; Cleared this setting is read-only.	Cleared	Cleared	Cost or service item.
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### Activity Generate Picking List (whinh4415m000)

**Activities by Warehousing Order (whinh2104m000)** Activities by Outbound Order Line (whinh2124m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected	Selected	Selected	Selected	Physical item and no-return rejected goods for warehouses that are not WMS-controlled.
Selected	Cleared	Selected	Cleared	Physical item and no-return rejected goods for warehouses that are not WMS-controlled.
Selected	Cleared	Cleared	Cleared	Cost or service item or rejected goods to be returned for warehouses that are not WMS-controlled.

### Activity Picking List (whinh4525m100)

**Activities by Warehousing Order (whinh2104m000)** Activities by Outbound Order Line (whinh2124m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected	Selected	Selected	Selected	Physical item and no-return rejected goods for warehouses that are not WMS-controlled.
Selected	Cleared	Selected	Cleared	Physical item and no-return rejected goods for warehouses that are not WMS-controlled.

Selected	Cleared	Cleared	Cleared	Cost or service item or rejected goods to be returned for warehouses that are not WMS-controlled.
Cleared	Cleared	Cleared	Cleared	

## Activity Warehouse Inspections Overview (whinh3122m000)

### Activities by Warehousing Order (whinh2104m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected	Cleared; this setting is read-only.	Selected	Cleared	Physical item and no-return rejected goods for warehouses that are not WMS-controlled.
Selected	Cleared; this setting is read-only.	Cleared	Cleared	Cost or service item or rejected goods to be returned for warehouses that are not WMS-controlled.
Cleared	Cleared	Cleared	Cleared	The <b>Return Quarantine Inventory Payable to Supplier</b> check box is selected in the Warehousing Orders (whinh2100m000) session.

## Shipment activity settings

The following tables show the default settings for the **Applicable** and **Automatic** check boxes in the Activities by Outbound Order Line (whinh2124m000) session.

## Shipment Procedure

### Activity Freeze/Confirm Shipments/Loads (whinh4275m000)

#### Activities by Warehousing Order (whinh2104m000) Activities by Outbound Order Line (whinh2124m000)

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected; Selected this set- ting is read-only.		Selected	Selected	Shipment is applicable.
Selected; Selected this set- ting is read-only.		Cleared	Cleared	Shipment is not applicable. See the following note.
Selected; Cleared this set- ting is read-only.		Selected	Cleared	Shipment is applicable.
Selected; Cleared this set- ting is read-only.		Cleared	Cleared	Shipment is not applicable. See the following note.

#### Note

Shipment is not applicable in the following situations:

- The goods are moved to a work center by means of a production order, an assembly order, or a maintenance work order.
- The goods are moved from one location to another in the same warehouse by means of an internal transfer order.

**Activity Print Bills of Lading (whinh4470m000)**

**Activities by Warehousing** Activities by Outbound Order Line (whinh2124m000)  
**Order (whinh2104m000)**

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected	Selected	Selected	Selected	
Selected	Cleared	Selected	Cleared	
Cleared	Cleared	Cleared	Cleared	

**Activity Print Packing Lists (whinh4476m000)**

**Activities by Warehousing** Activities by Outbound Order Line (whinh2124m000)  
**Order (whinh2104m000)**

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected	Selected	Selected	Selected	
Selected	Cleared	Selected	Cleared	
Cleared	Cleared	Cleared	Cleared	

**Activity Print Packing Slips (whinh4475m000)**

**Activities by Warehousing** Activities by Outbound Order Line (whinh2124m000)  
**Order (whinh2104m000)**

Applica- ble	Automatic	Applica- ble	Automatic	Conditions
Selected	Selected	Selected	Selected	

Selected	Cleared	Selected	Cleared
Cleared	Cleared	Cleared	Cleared

---

## Default values for order line activities

The following tables show the values for the **Applicable** and **Automatic** check boxes for each activity in the Activities by Warehousing Order (whinh2104m000) session and the order lines activities sessions Activities by Inbound Order Line (whinh2114m000) and Activities by Outbound Order Line (whinh2124m000). For each value specified in the Activities by Warehousing Order (whinh2104m000) session, ERP LN 6.1 provides a default value in the relevant lines activities session when the activities are copied from the Activities by Warehousing Order (whinh2104m000) to the relevant order lines activities session.

### Receipt Procedure

*Receipt activity settings (p. 16)*

### Inspection Procedure

*Inspection activity settings (p. 20)*

### Outbound Procedure

*Outbound activity settings (p. 22)*

### Shipment Procedure

*Shipment activity settings (p. 25)*

# Chapter 5

## Modifying Activity Settings

5

### To modify activities by order line

For each activity of an inbound or outbound order line, one or more conditions determine whether you can change the settings of the **Applicable** and **Automatic** fields, and what settings you can change.

### To change order line activities for the receipt procedure

The following tables list the conditions that determine whether you can change the settings of the **Applicable** and **Automatic** fields, and what settings you can change, for activities of the receipt procedure for inbound order lines.

#### Activity Print Receipts (whinh3412m000)

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	Only if the status of the inbound order line is <b>Open</b> .
	Selected	Cleared	Only if the status of the inbound order line is <b>Open</b> and the goods received not has not yet been printed.
<b>Automatic</b>	Cleared	Selected	Only if the status of the inbound order line is <b>Open</b> .
	Selected	Cleared	Only if the status of the inbound order line is <b>Open</b> and the goods received not has not yet been printed.

**Activity Warehouse Receipt (whinh3512m000)**

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	The Warehouse Receipt (whinh3512m000) session is mandatory for the <b>Receipt Procedure</b> . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
<b>Automatic</b>	Cleared	Selected	Only if no receipt lines exist.
	Selected	Cleared	Only if no receipt lines exist.

**Activity Generate Inbound Advice (whinh3201m000)**

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	The Generate Inbound Advice (whinh3201m000) session is mandatory for the <b>Receipt Procedure</b> . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
<b>Automatic</b>	Cleared	Selected	Only if no confirmed receipt lines exist.
	Selected	Cleared	Only if no confirmed receipt lines exist.

**Activity Put Away Inbound Advice (whinh3203m000)**

Check box	Change from	To	Condition/information
-----------	-------------	----	-----------------------

---

<b>Applica-</b>	Cleared	Selected	This check box is automatically cleared and read-only if the Generate Storage List (whinh3415m000) activity is set to not applicable.
	Selected	Cleared	This check box is automatically selected and read-only if the Generate Storage List (whinh3415m000) activity is set to applicable.
<b>Automat-</b>	Cleared	Selected	Only if no inbound advice lines exist.
<b>ic</b>	Selected	Cleared	Only if no inbound advice lines exist.

---

#### Activity Generate Storage List (whinh3415m000)

Check box	Change from	To	Condition/information
<b>Applica-</b>	Cleared	Selected	Only if the status of the inbound order line is not beyond Received.
<b>ble</b>	Selected	Cleared	Only if the status of the inbound order line is not beyond Received.
<b>Automat-</b>	Cleared	Selected	Only if no inbound advice lines exist.
<b>ic</b>	Selected	Cleared	Only if no inbound advice lines exist.

---

#### Activity Storage List (whinh3525m100)

Check box	Change from	To	Condition/information
<b>Applica-</b>	Cleared	Selected	This check box is automatically cleared and read-only if the Generate Storage List (whinh3415m000) activity is set to applicable.
<b>ble</b>	Selected	Cleared	This check box is automatically selected and read-only if the Generate Storage List (whinh3415m000) activity is set to not applicable.
<b>Automat-</b>	Cleared	Selected	Only if no inbound advice lines exist.
<b>ic</b>	Selected	Cleared	Only if no inbound advice lines exist.

---

## To change order line activities for the inspection procedure

The following tables list the conditions that determine whether you can change the settings of the **Applicable** and **Automatic** fields, and what settings you can change, for activities of the inspection procedure for inbound order lines.

### Activity Warehouse Inspections Overview (whinh3122m000)

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	The Warehouse Inspections Overview (whinh3122m000) session is selected by default. Therefore, you cannot change this check box from cleared to selected.
	Selected	Cleared	The Warehouse Inspections Overview (whinh3122m000) activity is mandatory for the <b>Inspection Procedure</b> . If you clear this check box, the other activities of the <b>Inspection Procedure</b> become cleared and read-only (which means that the inspection procedure is not used for the selected order line).
<b>Automatic</b>	Cleared	Selected	This setting is cleared and unavailable.
	Selected	Cleared	See the previous explanation.

### Activity Generate Inbound Advice (whinh3201m000)

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	The Generate Inbound Advice (whinh3201m000) session is mandatory for the <b>Inspection Procedure</b> . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
<b>Automatic</b>	Cleared	Selected	Only if no inspection lines exist.
	Selected	Cleared	Only if no inspection lines exist.

**Activity Put Away Inbound Advice (whinh3203m000)**

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	This check box is automatically cleared and read-only if both the item and the warehouse are location controlled and the Generate Storage List (whinh3415m000) activity is set to not applicable.
	Selected	Cleared	This check box is automatically selected and read-only if both the item and the warehouse are location controlled and the Generate Storage List (whinh3415m000) activity is set to applicable.
<b>Automatic</b>	Cleared	Selected	Only if no inspection lines exist.
	Selected	Cleared	Only if no inspection lines exist.

**Activity Generate Storage List (whinh3415m000)**

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	Only if no inbound advice lines exist.
	Selected	Cleared	Only if no inbound advice lines exist.
<b>Automatic</b>	Cleared	Selected	Only if no inbound advice lines exist.
	Selected	Cleared	Only if no inbound advice lines exist.

**Activity Storage List (whinh3525m100)**

Check box	Change from	To	Condition/information

---

<b>Applicable</b>	Cleared	Selected	This check box is automatically cleared and read-only if the Generate Storage List (whinh3415m000) activity is set to applicable.
	Selected	Cleared	This check box is automatically selected and read-only if the Generate Storage List (whinh3415m000) activity is set to not applicable.
<b>Automatic</b>	Cleared	Selected	Only if no inbound advice lines exist.
	Selected	Cleared	Only if no inbound advice lines exist.

---

## To change order line activities for the outbound procedure

The following tables list the conditions that determine whether you can change the settings of the **Applicable** and **Automatic** fields, and what settings you can change, for activities of the outbound procedure for outbound order lines.

### Activity **Generate Outbound Advice (whinh4201m000)**

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	The Generate Outbound Advice (whinh4201m000) session is mandatory for the <b>Outbound Procedure</b> . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
<b>Automatic</b>	Cleared	Selected	See the previous condition.
	Selected	Cleared	See the previous condition.

---

### Activity **Release Outbound Advice (whinh4202m000)**

Check box	Change from	To	Condition/information

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<b>Applicable</b>	Cleared	Selected	The Release Outbound Advice (whinh4202m000) session is mandatory for the <b>Outbound Procedure</b> . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
<b>Automatic</b>	Cleared	Selected	Only if no outbound advice lines exist.
	Selected	Cleared	Only if no outbound advice lines exist.

---

#### Activity Generate Picking List (whinh4415m000)

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	Only if no outbound advice lines exist.
	Selected	Cleared	Only if no outbound advice lines exist.
<b>Automatic</b>	Cleared	Selected	Only if no outbound advice lines exist.
	Selected	Cleared	Only if no outbound advice lines exist.

---

#### Activity Picking List (whinh4525m100)

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	This check box is automatically cleared and read-only if the Generate Picking List (whinh4415m000) activity is set to applicable.
	Selected	Cleared	This check box is automatically selected and read-only if the Generate Picking List (whinh4415m000) activity is set to not applicable.
<b>Automatic</b>	Cleared	Selected	Only if no outbound advice lines exist.
	Selected	Cleared	Only if no outbound advice lines exist.

---

**Activity Warehouse Inspections Overview (whinh3122m000)**

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	The Generate Outbound Advice (whinh4201m000) session is mandatory for the <b>Outbound Procedure</b> . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
<b>Automatic</b>	Cleared	Selected	See the previous condition.
	Selected	Cleared	See the previous condition.

**To change activities for the shipment procedure**

The following tables list the conditions that determine whether you can change the settings of the **Applicable** and **Automatic** fields, and what settings you can change, for activities of the shipment procedure for outbound order lines.

**Activity Freeze/Confirm Shipments/Loads (whinh4275m000)**

Check box	Change from	To	Condition/information
<b>Applicable</b>	Cleared	Selected	The Freeze/Confirm Shipments/Loads (whinh4275m000) session is mandatory for the <b>Shipment Procedure</b> . Therefore, this check box is selected and read-only.
	Selected	Cleared	The Freeze/Confirm Shipments/Loads (whinh4275m000) session is mandatory for the <b>Shipment Procedure</b> . Therefore, this check box is selected and read-only.
<b>Automatic</b>	Cleared	Selected	Only if no shipment lines exist.
	Selected	Cleared	Only if no shipment lines exist.

**Activity**

- Print Bills of Lading (whinh4470m000)
- Print Packing Lists (whinh4476m000)
- Print Packing Slips (whinh4475m000)
- Print Delivery Notes (whinh4477m000)

<b>Check box</b>	<b>Change from</b>	<b>To</b>	<b>Condition/information</b>
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<b>Applica-</b>	Cleared	Selected	Only if no confirmed or frozen shipment lines exist.
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	Selected	Cleared	Only if no confirmed or frozen shipment lines exist.
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<b>Automat-</b>	Cleared	Selected	Only if no confirmed or frozen shipment lines exist.
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	Selected	Cleared	Only if no confirmed or frozen shipment lines exist.
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# Chapter 6

## Planned Status

6

## How to define lot and serial registration templates

Lot and serial registration templates are used to specify the order origins and transaction types for which serial and/or lot registration must take place.

To define lot and serial registration templates, proceed as follows:

1. In the Lot and Serial Registration Templates (whwmd4102m000) session, enter an identification code and a description for the lot and serial registration template.
2. Highlight the identification code and description you entered in the previous step and on the appropriate menu, select **Lot and Serial Registration by Order Origin**. As a result, the Lot and Serial Registration by Order Origin (whwmd4103m000) starts. The highlighted registration template identification code and description is displayed in the header section.
3. In the Lot and Serial Registration by Order Origin (whwmd4103m000), click .
4. In the **Order Origin** field, select the origin of the orders for which lot and/or serial registration must take place.
5. In the **Transaction Type** field, select the inventory transaction type for which lot and/or serial registration must take place.
6. Select the **Lot Registration** check box if lot registration must take place for the selected order origin and transaction type.
7. Select the **Serial Registration** check box if serial registration must take place for the selected order origin and transaction type.
8. Save the settings made in the previous steps.
9. If required, repeat the previous steps to specify other order origin and transaction type combinations for which lot and/or serial registration must take place.

### Important!

You can also use lot and serial registration templates to exclude order origins and transaction types from lot and/or serial registration. If a general lot and/or serial registration parameter is set in the Item -

Warehousing (whwmd4600m000) session and you do not want lot or serial registration to take place for a particular order origin and transaction type, select the order origin and the transaction type as described in steps 4 and 5, and clear the **Lot Registration** and/or **Serial Registration** check boxes.

# Appendix A

## Glossary

A

### activity

A step in a warehousing procedure. An activity corresponds with a session of the Warehousing package. For example, the inbound activity Generate Inbound Advice is performed using the Generate Inbound Advice (whinh3201m000) session.

### appropriate menu

Commands are distributed across the **Views**, **References**, and **Actions** menus, or displayed as buttons. In previous LN and Web UI releases, these commands are located in the *Specific* menu.

### handling unit

A uniquely identifiable physical unit that consists of packaging and contents. A handling unit can contain items. A handling unit has a structure of packaging materials used to pack items, or is a part of such a structure.

A handling unit includes the following attributes:

- Identification code
- Packaging item (optional)
- Quantity of packaging items (optional)

If you link an item to a handling unit, the item is packed by means of the handling unit. The packaging item refers to the type of container or other packing material of which the handling unit consists. For example, by defining a packaging item such as Wooden Crate for a handling unit, you specify that the handling unit is a wooden crate.

See: handling unit structure

## inventory transaction type

A classification that is used to indicate the type of inventory movement.

The following inventory transaction types are available:

- **Issue**  
From warehouse to other entity than warehouse.
- **Receipt**  
From other entity than warehouse to warehouse.
- **Transfer**  
From one warehouse to another.
- **WIP Transfer**  
From one costing work center to another.

## warehousing order type

A code that identifies the type of a warehousing order. The default warehousing procedure that you link to a warehousing order type determines how the warehousing orders to which the order type is allocated are processed in the warehouse, although you can modify the default procedure for individual warehousing orders or order lines.

## warehousing procedure

A procedure to handle warehousing orders and handling units. A warehousing procedure comprises various steps, also called activities, that a warehousing order or a handling unit must take to be received, stored, inspected, or issued. A warehousing procedure is linked to a warehousing order type, which in turn is allocated to warehousing orders.

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