Infor Distribution SX.e Total Warehouse Logistics User Guide for Managing Orders

Release 11.21.9

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Contents

About this guide

This guide is designed to help you use the Total Warehouse Logistics module for managing orders.

Intended audience

This guide is intended for users who are responsible for workflow tasks in the warehouse.

Related documents

Infor product documentation is available from the Infor Support Portal. System administrators must have a working knowledge of the Distribution SX.e system and be familiar with the current version of these documents:

- *Infor Distribution SX.e Total Warehouse Logistics User Guide for <tasks>*

  Each guide provides overview and detailed instruction information to use the Total Warehouse Logistics application for TWL tasks:

  Receiving, inspecting, putting away stock, managing orders, picking, packing, shipping packages, kitting and fabrication, handling material, counting inventory, and balancing inventory.
- *Infor Distribution SX.e Setup and Administration Guide for Total Warehouse Logistics*

  This guide provides overview and detailed instruction information for implementing the Total Warehouse Logistics application. Descriptions of the many system parameters used in TWL are also provided.
- *Infor Distribution SX.e Administration Guide*
- *Infor Distribution SX.e User Guide*
- *Infor Distribution SX.e Release Notes*

Contacting Infor

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Chapter 1: Overview

Total Warehouse Logistics (TWL) is Infor's warehouse management solution for the Distribution SX.e application. Use the TWL module to direct the workflow of goods from its original source to the final destination. This workflow includes order processing, picking, packing, shipping, and delivery. TWL also provides access to inventory control through replenishment, receiving, putaways, counting, and balancing.

Total Warehouse Logistics

Total Warehouse Logistics (TWL) is Infor's warehouse management solution for the Distribution SX.e application. You can use the TWL module to direct the workflow of goods from the original source to the final destination. This workflow includes order processing, picking, packing, shipping, and delivery. TWL also provides access to inventory control through receiving, putaways, counting, and balancing.

TWL Components

These integrated components create an interface between the modules and database, and enable you to share data and keep that data current:

- Distribution SX.e
- Warehouse Logistics (WL) module
- TWL Web module in Distribution SX.e
- TWL Radio Frequency (RF)
- End-of-day (EOD) process
- Database

Distribution SX.e

The financial data, static records, and the proprietary information of your organization are controlled by the Distribution SX.e system. Transactions occur throughout the business day. Those transactions that affect your warehouse pass data to TWL for processing.

Warehouse Logistics module

The Warehouse Logistics (WL) module includes functions for inquiry, entry, reports, and administration. The WL module setup is used to communicate to other extensions other than the TWL module, which is why WL module is separate from the TWL module.

A primary function in the module is the **WL Transaction Inquiry**. This function shows all data communication files that are passed between the modules and the system database. You can use the **WL Transaction Inquiry** to monitor, resubmit, or modify the status of some communications.

TWL

TWL is composed of the TWL Web module and TWL RF modules. These components control the warehousing tasks that directly affect inventory. Although timing differences inherently exist with record updates, correct use of the RF and TWL Web module ensures that all components are accurately updated.

TWL Web module

Warehouse managers use TWL Web module functions to schedule and direct tasks that are performed by the RF users. The information gathered by RF units updates the TWL Web module system immediately. Because every movement in the warehouse is recorded, several analysis and management reports are available and can be run from TWL Web module.

Access the TWL Web module from the **Menu**. Use this module to initially set up master records and system-wide parameters. Then, you can use this module to inquire on TWL records, generate TWL reports, and perform warehousing tasks. The TWL Web module functions are organized into these categories:

- **TWL Administration:** Administration-related processes, such as managing RF employees, reviewing communication with other TWL modules, or managing functional setup.
- **TWL Configuration**: Processes for managing the configuration of the warehouse, such as specific layout, locations, and the goods that are contained within them.
- **TWL Execution**: Processing for maintaining the integrity of the inventory in your warehouse.
- **TWL Inbound**: Processing specific storage and delivery of goods coming into a warehouse.
- **TWL Outbound**: Processing specific to goods going out of the warehouse.

TWL Radio Frequency (RF)

The TWL Web module works in tandem with one or more RF units. The RF data communication unit consists of a keypad, screen, and scanner. For certain tasks that are performed with the RF, the TWL Web module works in the background to provide several edit checks that verify transactions for accuracy. The TWL Web module also directs movements to reduce wasted traveling, searching, and misdirection.

See TWL Web RF Shortcut Keys on page 50 for a list of shortcut keys to expedite the time it takes to perform certain RF tasks.

If your company uses RF units for both TWL and Integrated Barcode in the cloud, a menu that allows you to select an interface might display when you first sign in to your RF unit. Select **1** to access the TWL interface.

Note: The menu is only available if your system administrator requested Infor to enable it.

End-of-day process

The End of Day (EOD) process is a background utility that maintains the age of data stored in the TWL files. EOD calculates inventory class by velocity, schedules cycle counts, cleans up system log files,

clears any inventory discrepancies, and creates the product history files. Set up EOD to run on a daily basis.

Database

The database contains schema and data for all modules.

Functional overview

Your managed warehouse logistic workflow and the Distribution SX.e data is shared between modules in one database. Product requests can be initiated from sales orders, warehouse transfers, or purchase orders. The communications to TWL can be viewed in **WL Transaction Inquiry**. The status of the communication indicates its processing level and whether communication errors require attention.

When data is sent to another module in the system, the transactions reside in **WL Transaction Inquiry**, with **`Active`** status, until a batch process picks up the transaction. The batch process updates the system with the information. The transaction status is changed to **`Inactive`**, so that the transaction is not processed again. The data communications pass through a series of tables during each stage of data flow.

Batch processing includes these functions:

- **WL Entry Batch Shipping Report**
- **WL Entry Batch Receiving Report**
- **WL Entry Batch Adjust Inventory Report**

These batch processes are necessary for opening and closing journals, timing the updates correctly, and controlling lock processes.

The direction in which the data communication travels between the TWL Web module and other modules depends on the type of transaction that starts. For example, printing an order starts a send communication, with a PCK process type, to release the information to TWL. You can view the order detail from the **WL Transaction Inquiry-Order Data** grid. View the line items and specific characteristics, such as status, process type, error messages and, if applicable, serial or lot and component.

Transactions, such as receipts, shipments, and stock adjustments that are synchronized by TWL. The information that is synchronized from TWL to the other modules is processed in the order in which the data is created.

Communication file structure

TWL and the system modules use a designated file structure to communicate data. This structure consists of these files:

- WLET file: The WLET driver file initiates the file communications between the two systems to send or receive information.

- WLEM file: This file contains static type of information, such as product information.
- WLEH file: If order data is transmitted from the system to TWL or from TWL to the system, the header information is contained in the WLEH file. The fields that show in **WL Transaction Inquiry** are dependent on the order type that relates to your inquiry.
- WLEL file: If line item records for shipping or receiving activities are transmitted from TWL to the system, the WLEL file connects the line items to the WLEH records. The WLEL file contains the assigned and unassigned information for serial and lot products and components. The fields that show in **WL Transaction Inquiry** are dependent on the order type that relates to your inquiry.

These files operate in the background, but you can view the information contained in the files with **WL Transaction Inquiry**. The **WL Transaction Inquiry** shows these files in a format in which you can obtain specific detail about a communication event. **WL Transaction Inquiry** initially shows the WLET records based on criteria that you enter. You can access different windows, pages, and tabs to obtain the necessary detail.

See Communication file structure descriptions on page 58.

Chapter 2: Managing orders

Your TWL system was set up specifically for your warehouse. Much consideration was given to the parameters and order management workflow to ensure a smooth operation and reduce repetitive keystrokes.

If you are a first-time TWL user, we recommend you study all of the concept topics and step-by-step instructions. If you are a more experienced user, use the concept topics and step-by-step instructions as a valuable troubleshooting tool. The order management tasks are presented in the order they typically occur.

Order Management is a key to order fulfillment. Use the various functions and reporting capabilities help you manage the order fulfillment process.

Order release

Various orders are created from these functions:

- **Sales Order Entry**
- **Transfer Entry**
- **Purchase Order Entry**
- **KP Work Order Center Entry**
- **VA Order Entry**

When each sales order, transfer, vendor return, fabrication work order, or value-add work order is printed, the order is released to the TWL module for processing. Printed orders pass through **WL Transaction Inquiry** with a PCK process type and are held in **Order Drop Manager**.

Sales orders

Sales orders are printed as pick tickets from **Sales Entry Pick Tickets Report** and **Sales Order Entry**. Pick tickets are documents printed for warehouse personnel. Personnel use pick tickets to know what products to pull from the shelves in the warehouse and stage them to be shipped. The pick ticket releases order information to TWL so the picking can be managed using the TWL module. Consider these points when managing orders:

- Rush orders are handled as emergency orders by TWL.
- Labor products are transmitted to TWL. These products are adjusted according to the **Labor** setting on the **TWL Configuration-Item** setup record in TWL.

- Line Direct Orders (DO) are not sent to TWL.
- The **Sales Order Entry** orders that are tied to Accumulative (AC) purchase orders are not released to TWL. The reason is because all products on the AC purchase order are obtained from a vendor, before being delivered to the customer.
- Printing pick tickets for Ship Complete orders can be delayed until the order is ready to be shipped. You may have set up the **Sales Entry Pick Tickets Report** as a stored report for printing pick tickets. If so, ensure the option, **Ship Complete Handling**, is set to **`Pack`**. Then, pick tickets for Ship Complete orders only print when all receipts have been processed and the order is ready to be shipped.
- Ship Complete lines that do not have inventory during order dropping are processed as if Parameter 20: Inventory Discrepancy is set to Zero Ship Line. The order line is immediately shipped. If the Ship Complete line is the only line on the order, then the order is processed as shipped. Messages in **Drop Summary** indicate which Ship Complete lines and orders were not processed.
- Serial numbers may have been assigned when the order was entered. If so, the customer service representative should select only one serial number per line item for a successful TWL release. If more than one serial number is selected per line, the serial numbers do not go with the order to TWL. If one serial is selected per line, but only a partial quantity is assigned, the serial number is also not released. Serial numbers may not be correctly specified on the order. In that scenario, your RF operator can specify the serial numbers on the RF unit during receipt or picking. Then, the serial number is updated in the order when the system is synchronized.
- You can send Tag & Hold orders from **Sales Order Entry** to TWL to be picked, packed, and staged before all lines are complete. This enables you to complete those lines where inventory is available, without creating back orders for the unfilled lines. Additional picks are created for the remaining lines as inventory is allocated in TWL. In **Order Drop Manager**, the Order Type 'Hold' is displayed on all lines of a Tag & Hold order.

Vendor returns

When incoming stock is identified as unavailable for sale during the initial receiving process, a Return Merchandise (RM) purchase order is created. Use the RM PO to send the goods back to the vendor. Printing the **Purchase Entry Processing Print POs Report** or printing a **Purchase Order Entry** creates the purchase order header and line item information for communication to the TWL picking files. You must pick, pack, and ship the RM to the vendor. Because the RM is a purchase order, the RM is processed in the **WL Entry Batch Receiving Report**.

Warehouse transfers

Transfer release and picking is similar to the order picking. When shipping from a TWL warehouse, printing the **Transfer Entry Print Warehouse Transfer Report** or printing a **WT Transaction Entry** creates data communication files to send the information to TWL for all line items.

Kits

The work order lists what components to pick. The **KP Entry Print Work Orders Report** releases the work order in the same manner as a sales order when printed. Parameter 2054, Prebuilt Kit Without Inventory, can be set to skip the order or zero ship the order. If a required component is not in stock in TWL, this parameter determines if a prebuilt kit drops to the floor. A required component cannot be deleted from the kit during entry if the Required option is selected in **KP Component Setup**.

The work order is released, but is given a temporary work-in-process status, and cannot be dropped in TWL. After all component lines are transmitted to TWL, the temporary status is lifted. Then, the work order shows in **Order Drop Manager** and can be dropped. The **Order Drop Manager** consolidates similar products for the same kit build department. The RF **Staging** screens include the kit build department to facilitate picking.

When the prebuilt kit is finished and a Receive process type is triggered, the actual quantities that were built are synchronized by TWL. This is processed by **KP Work Order Center Entry-Accept**. The Accept process is launched from the **WL Entry Batch Receiving Report** to update the database with the prebuilt kits that were built.

Note: Negative values are not supported in the Kit Production, Value Add, or build-on-demand kit integrations to warehouse management integrations, such as TWL. Not supported are negative kit disassembly, negative parent values, and negative component values.

Build-on-demand kits are different from prebuilt kits. They are built from the components listed on an order, rather than assembled in a work center like prebuilt kits. Build-on-demand kits do not allow for partial components to be shipped and the rest of the build-on-demand components backordered. A parent shipped quantity of the build-on-demand considers all of the components of the line completed in full. If all components are not available, parameter 2053, BOD Kit With Required Component, can be set to skip the order or zero ship an order. If the parameter is set to **`Skip Order`**, the entire order is skipped and becomes an Order Skipped on Drop exception. If set to **`Zero Ship Kit`**, the build-on-demand kit line on the order is zero-shipped.

Typically, you would prefer to prevent Work Orders that have been staged from being undropped. However, parameter 0022, Work Center Picked Status, provides flexibility. This parameter enables you to choose whether in-process work orders for a kit can be undropped. The parameter is set to **`No`** to allow undrops. You must make inventory adjustments afterward. For example, if you undrop the order, the inventory is unavailable [stock status W] in a staged location and is not available for picking. The inventory may be the only inventory for the kit. In that scenario, you must remove the inventory from the staged location and place the item(s) back into inventory. Then, you must redrop and restage the order.

The parameter 0022 is set to **`Yes`** to prevent undrops. The staging of any inventory in a work center changes the status of all work orders in **Order Drop Manager**. The status is changed to Picked when the orders are in the same batch and consist of a component of the same item. This prevents unintentional un-dropping within the **Order Drop Manager** that could leave inventory in unavailable status.

For undropping in-process work orders, if you must undrop a specific kit order, you can set the work order back to Open. The order must be a kit and must be in the Picked stage. In **TWL Outbound-Order Drop Manager**, use the Search pane to specify criteria to search for a kit in **`Picked`** stage. Select the record. Click **Update**. Then select **`In Use To Open`**. Save the record.

Value-Add work orders

You can externally process a value-add (VA) product. Typically you are sending raw materials from your inventory to a service vendor. The service vendor provides the labor and equipment to build the product. The product is then sent back to you for sale or additional processing.

When inventory is available for a VA work order, the **Inventory (IN)** sections are released to TWL for picking and shipping to the vendor. The section number is combined with the work order number in TWL. For example, f000000202 is VA work order 2, section 2.

See *Infor Distribution SX.e Total Warehouse Logistics User Guide for Receiving and Putting Away*; and *Infor Distribution SX.e Total Warehouse Logistics User Guide for Picking, Packing, Shipping, Kitting and Fabrication*.

Order numbering and prefixes

A nine-digit order number with a two-digit suffix is used for orders. When an order is released to TWL, a distinguishing prefix and leading zeros are used to fill the nine-digit field. The original order number is also used. For example, order number 231-00 is entered in **Sales Order Entry**; in TWL the order is o000000231, with a suffix of 00.

Note: In on-premises Distribution SX.e, nine-digit order numbers are used only after the conversion programs are run when upgrading to version 11.19.9. If you use an earlier version, eight-digit order numbers with a two-digit suffix are used.

If the order is a warehouse transfer [7-digit], the number would be t0000231, with a suffix of 00.

For a purchase order [7-digit], the number would be p0000231, with a suffix of 00.

For a work order [7-digit], the number would be w0000231, with a suffix of 00.

For a Value Add work order number [9-digit], the section number is combined with the Value Add work order number in TWL. For example, f000000202 is VA work order 2, section 2.

Order stages

The order stages for a TWL warehouse are the same as in a regular system warehouse:

- Stage 0 (Entered)
- Stage 1 (Ordered)
- Stage 2 (Picked)
- Stage 3 (Shipped)
- Stage 4 (Invoiced)
- Stage 5 (Paid)
- Stage 9 (Cancelled)

After an order has been printed, a Pick transaction is created in **WL Transaction Inquiry** and the order is released to TWL. In TWL, each line item is assigned a stage. The stage of the order is based on the lowest status line on the order. For example, an order has two lines, and one has been picked, but the other line has not been picked. The order is in 'In-Pick' stage, not 'Picked' stage.

This table shows the stage, description, status, and sequence of an order:

Stage	Description	Status	Sequence
Open	Released to **Order Drop Manager**, but not dropped.	O	1
In Pick	Dropped to the floor.	I	2
Picked	All lines have been picked. In a pick-to-tote warehouse, a single line order that has been picked is in Picked stage. In a pick-to-pack warehouse, the order is in Packed stage.	C	3
Packed	Picking is complete and order can be packed. In a pick-to-pack warehouse, the stage is automatically upgraded because the manual packing steps are bypassed.	P	4
Verified	Not currently used.	V	5
Loaded	Loaded on truck but not shipped.	L	6
Shipped	Ship verification has occurred. SHP records are created in **WL Transaction Inquiry**.	S	7

Order inquiries

TWL Outbound-Order Management has multiple venues available for conducting searches and inquiries and filtering results. The main access points are from **TWL Outbound-Order Management-Order Drop Manager** and from the **TWL Outbound-Order Management** menu.

TWL Outbound-Order Management-Order Drop Manager

- Use the **Search** pane for a quick search. In **Warehouse**, you must select a TWL warehouse. In **View**, you can filter by selecting one of these options:
  - **`UnDropped`**
  - **`Dropped and Open`**: The search is automatically filtered for open and assigned orders.
  - **`Dropped`**: The search is automatically filtered for any assigned order.
  - **`All`**: The search is automatically filtered for all orders at any stage. In the **Wave** field, you can manually enter a wave number or use the lookup. If you enter an invalid number, all records are displayed.

  Note: Use the **Advanced Search** independently from the **Search** pane. The searches are not used in combination.
- Use the **Advanced Search** feature and criteria settings to view various orders. For example, you can view orders that are ready to be dropped, orders that have been dropped, or all assigned and unassigned orders.

  : TheYou can drill down on an order in the grid to view order details. In the toolbar, if an Emergency or Exception exists, click the **Emergency** or **Exceptions** button in the toolbar. Orders with comments are noted in the grid line. Click **Comments** in the grid toolbar to view the comments.

- In **Search Results Summary**, click **Show More**. This section indicates in the grid title which search option you used, Search or Advanced Search. The grid shows a count summary of orders returned with your search. Select **`Show Selected Totals`** to view the totals of the orders you have selected in the grid. You can select more than one order; the totals are calculated for those orders. In the grid, you can also expand an order to view the lines in the order. The lines are displayed in a grid below the order. The line grid shows the **Line #**, **Line Sequence #**, **Alt Whse**, **Item Number**, **Item Description**, **Ship Complete**, **Item Zone**, **Requested** quantity, and **Actual** quantity. Notice also that each **Order #** in the grid is a hyperlink to **Order Inquiry** for that specific order. This feature enables you to view additional detail specific to the order and lines.

TWL Outbound-Order Management menu

From this menu, you can also select from these functions:

- Use **Dropped Order Status** to find information about **Customer Orders**, **Customer**, **Carrier**, **Expected Ship Date**, **Priority**.
- Use **Employee Wave Assignments** to find information about **Waves** and **Picks** that are assigned to employees.
- Use **Order Inquiry** to view **Header**, **Lines**, **Transactions**, **Manifest**, **Availability**, **Predictive Shipping**, and **Wave** details. Some tabs do not show unless data exists.

  To find additional information on the **Lines** tab, select a line, and click the **Inquiries** button on the grid toolbar. If data is available pertaining to that line, select from the list: **`Available Quantity`**, **`Transactions`**, **`Picks`**, **`Transaction Summary`**. You can also inquire on **Inventory** from the **Lines** tab.
- Use **Wave Inquiry** to filter by status and date ranges, and drill down on waves statistics and counts.

See the *Infor Distribution SX.e User Guide* for information about Function searches using the Search pane or Advanced Search.

Inventory allocation

You can control the inventory allocation process by setting the sequence of where to look for inventory that is allocated to pick records. When you set up inventory allocation, you are telling the system where to allocate inventory when the order is dropped. This is the system level hierarchy for sequence rules:

- Carrier-specific
- Order Class-specific
- Warehouse-specific

The TWL system hierarchy is for carrier sequence rules first, then order class, then warehouse. If a carrier is found, the carrier sequence is used. When no carrier-specific record is set up, an order class record is found to allocate inventory. If no order class-specific record is found, inventory is allocated in warehouse-specific sequence. The warehouse default option is used for all orders where an order class or carrier sequence is not defined.

Secondary pick sequences influence the inventory allocation within each of the primary sequence pick areas.

Secondary pick sequences

The primary pick sequences define which locations types to pick from. Secondary pick sequences provide more detail about what sequence to pick the locations from within that area. You can define these secondary pick sequences when you set up product categories, warehouse zones, and locations:

- Product Category: This sequence enables you to pick across all zones for specific product groups. This pick should be performed before all other picks. The sequence applies more to the sequence in which the RF operator sees the picks, rather than how the pick locations are determined.
- Warehouse Zone sequence
- Bin Location: This sequence enables routing picks to be set up with a zone when using the aisle/row/bin methodology as the bin number.
- Bin Number: This sequence enables alphanumeric sorting.

Pick records are sorted by zone/aisle/location. If you also set up a product category pick sequence, the pick records are sorted by product category/zone/aisle/location.

Primary pick locations are honored by TWL first. Then, everything else is balanced, including pick sequence, to determine the most efficient pick possible. For example, a location that only requires a single pick is found first by the system, verses two picks in different locations. This may vary based on your setups for the type of order you are dropping; that is, whether you are using a Zone pick sequence or a FIFO sequence. Ultimately, the TWL logic is set up to reduce the number of picks to increase productivity.

Setting up inventory allocation sequences

Use these instructions to define the way inventory is allocated to pick records. A hierarchical sort by carrier, then order class, then warehouse zone, enables you to organize pick waves.

1. Select **TWL Outbound > Order Management > Picking > Pick Sequence**.
2. Specify a warehouse and click **Search**.
3. Select an inventory allocation method by clicking the appropriate tab: **Warehouse**, **Carrier**, **Order Class**. For example, click **Carrier**. In the grid, a list of carriers you previously defined is displayed.
4. In the grid, select a carrier. For example, **`UPS Ground`**.
5. Expand the record.
6. In the criteria order table, from the **Available** column, select a criteria and click the **arrow** to move that criteria to the **Selected** column. For example, for UPS Ground, you might select **`Case Primary`** and **`Split-Case Primary`**. You must move each criteria separately.

   Criteria in the criteria order table are hard-coded in the system and cannot be changed.

   To move a criteria higher in priority, hover over a criteria in the **Selected** column. Use the double-headed **arrow** and drag the criteria up or down in the list.
7. Click **Save**.
8. In the grid, in the **Sequence Assigned** column, the option is now selected for that carrier.
9. Repeat steps as needed to define your inventory allocation routine.

For example, you can use **`Will Call`** as the carrier. Then, you would require the inventory allocation to be in **`Counter Primary`** and **`Counter Zone`**, where the item would be close to your counter.

Deleting a sequence assignment

1. Select **TWL Outbound > Order Management > Picking > Pick Sequence**.
2. Specify a warehouse and click **Search**.
3. Click the **Carrier** tab.
4. Select the carrier line.
5. In the toolbar, click **Delete Sequence Assignment**.

Changing a sequence assignment

1. Select **TWL Outbound > Order Management > Picking > Pick Sequence**.
2. Specify a warehouse and click **Search**.
3. Click the **Carrier** tab.
4. Select the carrier.
5. Expand the record, and use the criteria order table to move a criteria from the **Selected** column back to the **Available** column.
6. Click **Save**.

Reviewing Secondary Sequence Setups

1. Select **TWL Outbound > Order Management > Picking > Pick Sequence**.
2. Specify a warehouse and click **Search**.
3. In the toolbar, click **Secondary Sequence Setups** and select from these options in the list:
   a. Select **`Product Category`** to access the **TWL Product Categories During Picking** page. You can review or make changes.
   b. Select **`Warehouse Zone`** to access the **Warehouse Zone Setup** page. You can review or make changes.
   c. Select **`Location`** to access the **TWL Location** page. You can review or make changes.
4. Save changes.

Saved changes take effect immediately.

See the *Infor Distribution SX.e Setup and Administration Guide for Total Warehouse Logistics* for instructions on setting up these pick sequences.

Reviewing references

You can review the initial warehouse sequence and related system parameters.

1. Select **TWL Outbound > Order Management > Picking > Pick Sequence**.
2. Specify a warehouse and click **Search**.
3. In the toolbar, click **Reference** and select from these options in the list:
   a. Select **`Initial Warehouse Sequence`** to access the **Initial Warehouse Sequence** page. The initial sequence defined when the warehouse was created is displayed. This is not used and is only displayed as a reference of what was initially recommended.
   b. Select **`System Parameters`** to access the **TWL System Parameters** page. You can review or make changes.
4. Save your changes.

See the *Infor Distribution SX.e Setup and Administration Guide for Total Warehouse Logistics* for instructions on setting up parameters.

Consolidating pick records

Pick records for a pick-to-pack warehouse must adhere to the carton validation rules, as specified in parameter 1060, Carton Validation, to be consolidated. Pick records for a pick-to-tote warehouse must adhere to the tote validation rules, as specified in parameter 1054, Tote Validation, to be consolidated.

1. Select **TWL Administration > System Parameters**.
2. In the **Search** pane, specify a TWL warehouse.
3. In **Parameter ID**, specify **`7007`**.
4. In the grid, select the parameter and click the drill down icon.
5. In **Value**, select **`Enabled: Default is No`**.

   When enabled, pick records are consolidated by waves, orders, or zones. The records must be for the same product, in the same bin, and have the same unit of measure.
6. Click **Save**.

If an 'over pick' is performed during a consolidated picking process, the last updated pick quantity is increased to accept the over pick amount. A message is displayed on the RF notifying the operator that an over pick was performed and that the pick quantity is being increased.

Generate a pick summary report or label

If you use on-premises Distribution SX.e, you can generate a label, or a pick summary report, to provide detailed wave information. Specific parameters must be enabled. Use parameter 2025, Pick Ticket/Label Print, to enable printing of a summary pick ticket or labels when dropping orders. Use parameter 0025, Pick Ticket/Label Program, to determine which format is printed:

- To print a summary report for the orders dropped in the wave, parameter 0025 must have the report specified in the **Value** field. You are prompted for an appropriate printer type when dropping orders.
- To print a label for the orders, parameter 0025 must have the label specified in the **Value** field. A Zebra label is printed with a summary of the orders dropped in the wave.

If these parameters are not enabled, contact your TWL administrator.

In **Order Drop Manager**, when you drop an order, you are required to select a printer. When you select the printer, the summary report or label prints.

See Dropping regular orders on page 23.

Order drop

Organize orders and drop them to the floor with **Order Drop Manager**. The manner in which the orders are dropped to the floor must be carefully planned, designed, and supervised. The objective of the routing pattern is to reduce or minimize the nonproductive time of traveling between locations. It should also increase delivery speed to the customer.

Order filtering

In **Order Drop Manager**, you can use **Search** or **Advanced Search** to find and show orders in the grid.

In the **Search** pane, you must specify a warehouse. When you do, a prompt may be displayed: `Confirmation - There are emergency orders. would you like to view them now?`. Emergency orders are rush orders. Click **`No`** to manage these orders later, or click **`Yes`** to manage them now.

In the **Search** pane, use the **View** field to filter your results by selecting from: **`Dropped`**, **`Undropped`**, **`Dropped and Open`**, or **`All`**. To further filter results, use the **Wave** lookup or the **Include On Hold** option. The record limit plays an important part in making this page manageable.

Use the **Advanced Search** independently from the **Search** pane. The searches are not used in combination. For example, when you specify the TWL warehouse in the Search pane, that warehouse does not auto-populate the **Warehouse** field in **Advanced Search**.

Filtered results are displayed in the grid. The grid label indicates which search is used. You can now manage the orders.

Toolbar buttons

When you select one or more orders in the grid, you can use the buttons in the grid toolbar to **Drop**, **Zero Ship**, **UnDrop**, **Update**, and view **Comments**. Buttons are available based on the order status. For example, if unassigned orders are selected and ready to be dropped, the **Drop** and **Zero Ship** buttons are available, and the **UnDrop** button is not. The **UnDrop** button is available for open and assigned orders.

Use the **Update** option to update the selected order. Options that are not applicable are not available. The options are:

- **`In Use To Open`**: Changes in-use orders back to open status. An order is in-use if another user is dropping the order. An order can also get stuck in-use if the user refreshes the browser during the drop process instead of continuing with **Next**. You can also use this option to undrop in-process work orders.
- **`Carrier`**: The carrier can be changed on selected orders.
- **`Rush`**: The order is changed to an Emergency (Rush) type; or reversed from an Emergency to non-Emergency.
- **`Assign Employees`**If the order has comments, use the : Enables you to change employee assignments on dropped orders.

If the order has comments, use the **Comments** button to view any comments.

Criteria

Use criteria to select which orders to drop together. To achieve the maximum employee productivity, the appropriate order picker routing pattern must be implemented in conjunction with these options:

Option	Description
Assigned	Shows orders that are assigned to a wave when they were dropped.
Branch ID	Enables you to find a warehouse transfer with a specific branch ID.
Carrier	Shows orders with a specific carrier. Dropping orders by carrier enables you to schedule order picking and processing to coincide with the carrier arrival. If the carrier on an order does not have a **TWL Outbound-Shipping-Carrier Master** record, the order is skipped when you try to drop the order.
Customer	Enables orders to be sorted by customer name or shipto location. The ship to location is the default value from the order.
Expected Ship Date	Prioritizes orders according to estimated ship date as promised to the customer.
Order #	Used when you know the specific order to be filled. Use this option to respond faster to emergency orders or to prepare pick-up or counter sale orders.
Order Class	Identifies whether the order is a counter sale, return to vendor, regular sales order, value add work order, warehouse transfer, or work order.
Order Status	Search by the order's status in TWL.
Order Type	Relates to the type of order you are dropping. Options include **`Assembly`**, **`Counter Sale`**, **`Backorder`**, **`Emergency`**, **`Regular`** order, **`Return to Vendor`**, **`Ship Complete`**, **`Tag & Hold`**, **`Just In Time`**, **`Value Add`**, **`Transfer`**, **`Transfer Direct`**, or **`Will Call`**.

Option	Description
Priority	Orders can be sorted according to the **Pick Priority** field on the **Customer Setup** record. The qualifying orders can also be sorted by date, order, priority, or status.
Product	Select this criteria to find all drop orders that include a specific product. This is useful to prioritize orders to be handled in Order Drop Manager for one product. You can specify a stocked, nonstock, or BOD kit product in the **Product** field. This search also includes zero-picked products. All lines on the qualifying order, including the selected product's line, are shown in the Advanced Search grid.
Record Limit	Use to keep the data displayed on the page manageable.
Route	The Route/Day/Stop value from the **Customer Setup** record is the default value in the **Sales Order Entry** order. Sorting orders by the route is helpful when you have a fleet of trucks or use a local delivery service. The **Route** field can contain up to 40 characters.
Single Line Orders	Single line orders can be picked, packed, and shipped faster to clear the queue for more labor-intensive or complicated orders. **Note:** If you are viewing single line orders in the **Order Drop Manager** grid, notice that the **Production Quantity** column applies only to single line orders. It also corresponds with that line's requested quantity.
Warehouse	Shows the warehouse you are working in. If you have security, you can also use this to view other warehouse orders and drop them.
Warehouse Zone	Picking by warehouse zone means zones are picked simultaneously, with the picker traveling through assigned stock areas in location sequence. At each location, they pick stock for all orders for the same product. The inventory is then sorted to fill individual orders.
Wave	Use this primarily to inquire on orders already dropped. When a group of orders is dropped, the group is assigned to a wave.
Work Order Department	Filters work orders for a specific kit build department or a list of kit build departments. If a work order contains multiple kits with different work orders that are assigned to different kit build departments, the order is displayed. At least one kit must match the kit build department criteria.

Dropping regular orders

1 Select **TWL Outbound > Order Management > Order Drop Manager**.

2 Click **Advanced Search**.

3 Specify this information, and then click **Search**:

Warehouse

Specify the TWL warehouse.

If emergency orders exist, this message is displayed: `Confirmation - There are emergency orders. would you like to view them now?`. Click **`No`**.

Order Status

Select **`Open`**.

Assigned

Clear this option.

Not Assigned

Select this option.

Order Type

Select **`Regular`**.

4. In the grid, if an order has comments, click **Comments** in the grid toolbar to view comments.
5. Select one or more qualifying orders, and click **Drop**. Drop is enabled if all orders selected are unassigned.
6. In **Select Printer**, specify a printer, and click **Next**.

   The **Select Printer** page is prompted based on parameter 2025, Pick Ticket/Label Print, and 0025, Pick Ticket/Label Program, settings. If these parameters are enabled, the page is not displayed in the workflow. After you select the printer, you are not asked to select a printer during subsequent drops in the same **Order Drop Manager** session.
7. In **Drop Summary**, optionally select the wave and click **Assign Employees** in the toolbar.
8. In **Assign Employees**, select one or more employees, and click **Submit**.
9. In **Drop Summary**, review the order.

   At the end of the drop, you can review what is dropped in the tabs. A tab is displayed only if relevant data for that tab exists.

   - **Waves**: Waves dropped and the number of orders tried.
   - **Order Attempted**: Order where the drop was attempted, including whether the drop attempt was successful or not and why not. You can click the order hyperlink to **TWL Outbound-Order Management-Order Inquiry** for more detail.
   - **Orders Not Attempted**: Orders that are not attempted. For example, if the order is In-Use, no attempt is made.
10. When you are done reviewing orders, click **OK**.

The order remains in Open status, but assigned, until the order is picked.

Undrop orders

An order may have been dropped to the floor, but you require changes that affect the warehouse. You can undrop the order in **Order Drop Manager** if the order is open and assigned. You can view the open, assigned orders in **Order Drop Manager** or **TWL Outbound-Order Management-Order Inquiry**.

When an order is undropped, that order goes back into the **Order Drop Manager** queue.

An order may have to be cancelled. After the order is returned to Undropped status, the order can be retrieved in **Sales Order Entry**, where the order can be cancelled. If the customer service representative is only making changes, those changes can be made and the order can be reprinted and released again to TWL.

For Carton Verification, you can review to ensure you have the cartons that are in the undrop process. This situation may occur if you are undropping a counter sale that has a mix of counter and warehouse picks. For example, with the **Warehouse Logistics Pick Type** field in **Sales Order Entry**.

Undropping an order

1. Select **TWL Outbound > Order Management > Order Drop Manager**.
2. Click **Advanced Search**.
3. Specify this information, and then click **Search**:

   Warehouse

   Specify the TWL warehouse.

   If emergency orders exist, this message is displayed: `Confirmation - There are emergency orders. would you like to view them now?`. Click **`No`**.

   Order #

   Specify the order number.

4. In the grid, select the order and click **Undrop**.
5. In **Undrop Summary**, click **OK**.

Undropping multiple orders

These steps apply to standard stock orders and blanket orders for products in a TWL warehouse.

1. Select **Sales > Inquiry > TWL Undo OE Order Picking Stage**.
2. In **TWL Warehouse**, specify the TWL warehouse.
3. In the grid, select the orders to undrop and click **Undo OE Order Picking Stage**.
4. Click **`Yes`** for the message: `Process Update?`.

The Update Status column in the grid displays either `Success` or displays an error, if encountered, during the update for each record selected in the inquiry. The order is removed from the inquiry after it is succesfully reverted.

Automatic order drop

Dropping orders automatically expedites the order processing workflow and eliminates the requirement for you to review orders and manually drop the orders. After you establish the rules for automatically dropping orders, orders that qualify to be dropped to the floor are identified by the system.

Based on the predefined timing parameters, the orders are dropped automatically without human intervention. The auto-drop process does not allow you to allocate inventory for RM purchase orders, so RM POs are excluded from automatic order dropping.

Building the rule is the most important phase of using automatic order dropping. When creating rules, consider your schedules for receiving inventory, putting away, replenishment, manpower allocation, carrier schedules, and resource allocation.

To build the rule, a rudimentary knowledge of Progress syntax is required for anything more than simple criteria entry. The criteria you specify is used to build a query statement that is used to find orders that meet the criteria specified.

The query statement built first attempts to find orders that are: a) in the company you are logged into, b) in the warehouse the rule was created for, and c) have not been assigned to be picked. The orders that meet those conditions, based upon the criteria you specify for the rule, are reviewed by the system.

In **Auto Drop Rule**, the **Field Name** field next to the **Criteria** field can be used to look up fields on the ORDHDR database table. These fields can be used in the criteria. Selecting a field from the lookup adds the word 'AND' and adds the field name selected to any existing criteria text. You must indicate how that field is used.

When a rule is saved, the criteria on that rule is used to build a query statement. That query is tested to determine if the rule can be executed. If the rule can be executed without errors, you are presented with a results window. The results indicate how many orders were found by the query and the actual query logic that was run to find them. If the query could not be executed, the results window shows the query logic that was attempted. It also shows any error message that resulted from attempting to execute the query. If the query could not be executed, any changes that are made to the rule are not saved. The criteria must result in a valid query before the rule can be saved.

Enabling auto drop

Before setting up the auto drop rules, you must define the company, warehouse, and printer. These values are used by an auto drop script to start up the auto drop process for each company-warehouse-printer combination. Printers that are used for TWL functions must be previously set up in **SA Printer Setup**.

The **Auto Drop Enable** settings determine if the `twlautodrop.start` script spawns an auto drop process for the specified warehouse, enabling the process to look at orders. If not enabled, then only the auto drop rules set for **`Immediately Drop`** are processed. The auto drop script reads the 'Enable Auto Drop' records and starts a background process for each entry.

1. Select **TWL Outbound > Auto Drop > Auto Drop Enable**.
2. Click **New**.
3. The **Company** and **Warehouse** values that default are based on your login and the warehouse that is specified in Search.
4. In **Printer**, specify a printer.
5. Click **Save**.

Creating an auto drop rule

1. Select **TWL Outbound > Auto Drop > Auto Drop Rule**.
2. In the **Search** pane, select the TWL warehouse, and click **Search**.
3. Click **New**.
4. In **Rule Code**, specify a descriptive name for the rule.
5. Click **Save**.
6. In the **General** section, build the **Criteria**.
   a. In **Field Name**, click the lookup icon to select valid fields from the order header database table (ORDHDR). For example, Carrier. When you select a field, that field populates the Criteria text box with “carrier =”.
   b. After the equal sign, specify a valid carrier set up in **TWL Outbound-Shipping-Carrier Master**; for example, upsg (UPS Ground).
   c. In **Field Name**, click the lookup icon to select and add a criteria; for example, order_status. When you add this field name, the logical operator “and’ is added by the system in front of the field name.
   d. After the field name, specify a valid order status; for example, Open.
   e. Your query statement should resemble this example: **`carrier = UPSG and order_status = Open`**
7. In the **Criteria** section, decide whether to **Immediately Drop** or to set up a scheduled drop. If you select **Immediately Drop**, the order drops as soon as it is printed, if it meets associated criteria. When you select this option, the scheduling fields become unavailable. In **Printer**, specify a printer for print labels or pick tickets. Be aware of your settings for parameter 25, Pick Ticket/Label Program, and parameter 2025, Pick Ticket/Label Print. Optionally, in **Priority**, specify a priority number for your rule.
8. If you chose to schedule a drop, further specify this schedule information in the **Criteria** section, as appropriate for your rule:
   a. In the **Action Time** section, select one or more options; such as, Monday and Friday.
   b. In **Execute Every**, specify a number based on the unit in the **Option** field; such as Hours or Minutes.
   c. In **Start Time**, select a start time.

d In **Stop Time**, select a stop time.

Note: Optionally, you can use the options in the **Specific** section, instead of the Execute Every, Start Time, and Stop Time values.

e In **Priority**, specify a value between zero and 999. The priority determines the sequence the rules are processed and prioritizes the drop processing when multiple rules are scheduled to run simultaneously.

f In the toolbar, select **Assign Employees**.

g From the **Available** column, select an employee and use the **arrow** key to move that employee to the **Selected** column.

h Click **Save**.

When a rule is saved, the query statement is tested by the system to determine if the query can be executed. If executed without errors, the **Auto Drop Rule Test Results** window is displayed. The results show the **Number of Orders Found That Match Rule**, and the actual query logic that was run [**Rule Query**]. Click **OK**.

If the query could not be executed, and your rule contains invalid criteria, an error message is displayed: `Cannot Create Auto Drop Rule Due to Invalid Criteria`. Click **OK** to return to the build page, where you can revise the criteria or cancel the rule. If the query could not be executed, any changes that are made to the rule are not saved. The criteria must result in a valid query before the rule can be saved.

Optionally, you can click the **TEST RULE** button. Results are displayed similar to when the statement was saved. The **TEST RULE** button is only available when not in edit mode.

9 Ensure your query is functional before activating the auto drop. Select the **Active** option in the **General** section to activate the auto drop.

Viewing the auto drop log

A log of the activity is generated by the rule during the order-dropping process. The run dates and times and the number of qualifying orders are recorded whenever the rule is generated. You can also view rule logs from the Auto Drop Rules function for an individual rule.

1 Select **TWL Outbound > Auto Drop > Auto Drop Log**.

2 In the **Search** pane, select the TWL warehouse, and click **Search**. You can also filter by rule.

3 In the grid, review the files.

4 In the toolbar, click **Delete Log Files**.

5 In **Delete Before**, specify a date.

6 Click **Submit**.

7 A confirmation question is displayed before the logs are removed. Click **Yes**.

If a record is removed, the date and operator are recorded.

Counter sale

A Counter Sale (CS) or point-of-sale (POS) order for a TWL warehouse is generally used in a cash and carry environment. For example, a warehouse where a customer comes in to purchase products at a counter area. These orders are released to TWL and dropped to the floor from **Order Drop Manager** or by an auto-drop routine.

The workflow anticipates that your customer leaves the counter with their purchased items, so payment or tendering for the items must be completed. For example, the customer selects items from your counter zone and brings them to the counter. You enter a Counter Sale order, tender the order, and process the order through your standard invoicing workflow to update the system.

For a location to be a counter sales primary pick, the location must be in a counter sale warehouse zone. A counter sale zone was set up on the **TWL Configuration-Warehouse Zone** master record when you implemented TWL, and only one counter sale zone exists per warehouse.

See information about entering a counter sale in the online help.

Picking

The **Warehouse Logistics Pick Type** field is displayed for counter sale orders in **Sales Order Entry** when an order is entered for a live TWL warehouse. This field controls whether a line item is picked from the counter zone or the warehouse. This option is useful for large quantities that are not usually stocked in a counter zone.

You must add the **Warehouse Logistics Pick Type** field to **Sales Order Entry**. Use the Personalize feature. To add this field, open **Sales Order Entry-Select Products**. In the toolbar, select **Line Entry-Advanced** to access the **Extended Fields**.

If you retain the default for this field, the logic attempts to pick the line item from the counter zone, then the warehouse. If you select **`Counter`** for the **Warehouse Logistics Pick Type** field, the line item is automatically picked from the counter zone. If you select **`Warehouse`** for the **Warehouse Logistics Pick Type** field, a standard pick request is created and the line item is picked from the warehouse.

You cannot ship a Counter Sale order from a TWL warehouse in **Sales Order Entry** while the order is currently being picked. If you attempt to ship, the record is noted as locked and a message is displayed: `This TWL Order Has RF Picks That Must Be Finished Before Shipping! (7131)`. The order cannot be shipped until the RF operator has finished picking and has released the order.

When the **Warehouse Logistics Pick Type** field is set at the kit component level, this setting overrides the line level setting. If the field is set at the line level, and the component level field is not set, the line level defaults to the component level.

Pick-to-tote warehouses do not have to pack a Counter Sale order because the customer leaves with the merchandise after the item(s) are picked. All Counter Sale class orders for pick-to-tote warehouses are treated as pick-to-pack orders. The carton ID defaults to expedite entry. To create fewer carton IDs, existing ones are used if the carton validation criteria is met.

You can edit line items for Counter Sale orders that are entered in the system for a TWL warehouse. Editing is allowed up until the point where the order is shipped. Any lines on the order that are not picked are zero shipped. This table shows the changes that are allowed:

Action	Description
Add	You can add new lines to a Counter Sale order. The same rules initially used for the order dropping and bin selection are used for added lines. An order that is already packed is moved back to the in-pick stage and the new line item is added to the picking queue. The order header type is changed to indicate a POS change. Pickers must expedite the order because the order was reopened.
Change Quantity	You can increase or decrease quantities on existing Counter Sale order lines.
Change Item	You can change a product on an existing Counter Sale. The existing product is removed and the new product is added.
Delete	

Shipping

You can ship or close a Counter Sale order from **Sales Order EntryAn order that is being picked can be moved to packed stage when all open pick records are removed. The picked inventory is returned to the original location that the item was picked from.**. In **Sales Order Entry-Initiate**, from the toolbar select **Order Entry Defaults-WL Counter Sales Shipping**.

In the system, the **`Ship Fully Tendered SO Order`**An order that is being picked can be moved to packed option in **SA-Administration-Administrator Options-Documents-Sales Orders-Entry Settings** is ignored for TWL warehouses.

Primary locations are specified on the **TWL Configuration-Item** master record. Each product can have a split case, full case, pallet, and counter sale primary location. The corresponding location master records determine the minimum and maximum quantities that are stored in the locations. A replenishment request is generated if the quantity on hand in the primary location is below the minimum quantity.

Parameter 2011, Counter Primary Replenishment, determines which locations are used to replenish the counter locations. You can either replenish the counter locations from non-primary locations in the warehouse or from any location including other primaries. Parameter 0008, FIFO or Size, determines which inventory to replenish inventory from. You may require that a primary location in the counter zone be topped off. You can use the replenishment function that is available from the **Product Replenishment Setup** function.

Suspending counter sale orders

You can be working on an order and be required to leave the order open to start another order. You can suspend the first CS (PO) order without being forced to tender the order before moving on to another order. These scenarios may occur:

- A customer places an order and must go to the car to get a checkbook. You can suspend the Counter Sale order and help the next person in line until the first customer returns.
- A counter person is not allowed to tender because a cashier has that responsibility. The counter person can enter and suspend the Counter Sale order. The cashier can then unsuspend the order and tender the CS.

- You print a pick ticket for a Counter Sale order. An authorization is required by the system to get back into the order and make changes. To avoid this, you can suspend the order in **Sales Order Entry**.

Unsuspending an order occurs automatically when you use change mode and recall the order number. If more than one suspended order exists in the system, press **F10 Suspended** from the **Order #** field. You must be in change mode to view a list of suspended orders. You are prompted for initials; all orders suspended by that operator are displayed.

A Counter Sale order for a TWL warehouse is typically tendered before being shipped and invoiced. This table shows messages that are displayed if certain conditions occur:

Message	All of these conditions occur:
`Order Is Suspended, Cannot Process (5950)`	• The order has not been tendered • The order has been suspended • You attempt to ship the order from **Sales Order Entry-Initiate** using the **`WL Counter Sales Shipping`** option • You attempt to invoice the order
`Order In Use By ... (5608)`	• The order has not been tendered • The order has been unsuspended and is being maintained • You attempt to ship the order

Vendor returns

Purchase order Return Merchandise (RM) orders are created in the system. When they are printed, they are released to the TWL **Order Drop Manager**. Vendor returns are processed in the same manner as customer orders and warehouse transfers that are shipped from your warehouse. They are dropped to the floor, picked, packed, and shipped to the vendor. Synchronization back to the system is based on which carrier you use. Are you using a shipping interface, also known as a host-managed carrier. Are you using a TWL-managed carrier to ship the products to the vendor. If you are using a shipping interface, synchronizing occurs after the products are packed. If you are using TWL to ship, synchronizing occurs after shipping.

Purchase order RM orders are processed in TWL **Order Drop Manager** because the RM represents inventory that is leaving your warehouse; however, the RM is inherently a purchase order (PO), so the PO is processed by the **WL Entry Batch Receiving Report**.

Return merchandise entry

When a purchase order RM is entered in **Purchase Order Entry**, the **Return Adjust Reason** is required. If the **Return Adjust Reason** is tied to a **Reason Unavailable** in **SA Table Code Value Setup**, then the entire purchase order contains the same **Reason Unavailable**. You can still change the reason at the line level.

Because the **Reason Unavailable** is specified by line item, additional line items must be entered if you are returning stock for other unavailable reasons. If you are returning several unavailable products with various unavailable reasons, enter each on a separate line. You can specify the **Reason Unavailable** in the **Returns** tab.

For example, you are returning a total quantity of 20 of product 1-001. A line item is entered for 10 with an **Reason Unavailable** that indicates the products were damaged by the carrier. Another line is entered for 10 with an **Reason Unavailable** that indicates a vendor return. A specific set of **Reason Unavailable** codes is permitted in TWL.

See the allowed reasons in the *Unavailable stock* section of this topic.

When the RM is printed, the line is released to TWL. You are not prompted to allocate the unavailable quantity when you drop the order if a non-TWL unavailable reason is used. Instead, a blank **Reason Unavailable** code is assigned to the line and the picker is directed to a location with available stock. When you process the order in the **WL Entry Batch Receiving Report**, the on hand quantity is reduced. The quantity is reduced in the same way that **Purchase Entry Receipt of Inventory** processes unavailable reasons that do not have sufficient quantity.

If the reason that is entered in **Purchase Order Entry** is valid in TWL, the reason is released to TWL when the RM is printed. When the order is dropped from the **Order Drop Manager**, select a location. That location must contain stock matching the **Reason Unavailable** that is assigned to the RM in the system. This is referred to as allocating stock.

Stock that is assigned to each **Reason Unavailable** must be stored in a separate location to facilitate damaged goods processing. After you allocate stock, individual pick records are created based on your selections. After it is picked, the RM must be packed and shipped. When the RM is synchronized to the system, the General Ledger updates for the **Reason Unavailable** types are combined and posted against the unavailable inventory account.

If you select a location that does not have a sufficient quantity, you must allocate stock. Otherwise, you receive error messages and the order is not dropped. After you allocate the required stock for the order, you can drop the order again and picking records are created.

System quantities

If you receive an error message when you enter the RM, you must investigate the unavailable quantities in both systems. Then, you can complete the RM. You can perform a lookup on the quantities in each unavailable type in **Product Unavailable Inventory Entry**.

The quantities and unavailable reasons can also be viewed in **TWL Outbound-Order Management-Order Inquiry**.

Review out-of-balance conditions before you make any adjustments. The out-of-balance condition might be due to timing issues if the batch processing reports have not updated the system balances.

Unavailable stock

In the system, stock that is not available for sale is maintained in a separate quantity balance in **Product Maintain Balances Entry**. In TWL, unavailable stock is categorized by the reason that stock is unavailable for sale. TWL contains hard-coded **Reason Unavailable** types to separate different types

of damaged stock for disposition. This table shows the **Reason Unavailable** types that were set up in **SA Table Code Value Setup** when you implemented TWL:

Code	Type	Description
C	Customs Hold	Reserved for future use.
H	Return Hold	Inventory is held for return processing
I	Inventory Hold	Goods that are damaged within the warehouse
L	Liquidation	Customer returns that have some value
O	Overage	Received more than ordered
Q	QA Hold	Inventory that is in the process of inspection
R	Returns Hold	Inventory that is received from a customer
S	Scrap	Customer returns that cannot be salvaged
T	Transport. Hold	Goods that are damaged in transit by the carrier

Manage a vendor return

Vendor Return Merchandise (RM) orders are processed in the same way as customer orders because the inventory must be gathered and shipped to the vendor.

In **Order Drop Manager**, when a purchase order return is dropped and the unavailable stock status is specified on the line, the **Return to Vendor: Unavailable Allocation** page is displayed. This page contains a list of order lines that require your selection. Drill down into each line that is displayed. The pending picks are displayed. If there are no pending picks, you must define the picks. When you click the **Allocate** button, you can view a list of unavailable inventory in the **Return to Vendor: Inventory Assignment** page. You can allocate from this page. If there is no inventory shown, then there is no inventory in the warehouse with an unavailable stock status set. You must do a stock adjustment using the RF and try to drop this order at a later time.

In the **Return to Vendor: Inventory Assignment** page, the **Stock Status** field is displayed in the **Quick Allocation** section. The default value is the stock status set in order entry. The status may not match any stock status on the page. You can perform a quick allocate by clicking the **Auto Allocate** button. Whatever stock status you have selected is allocated by the system, so select a stock status that has some inventory.

Optionally, you can specify quantities in the **Requested** column of the **Return to Vendor: Inventory Assignment** page. The **Remaining Quantity** value changes when you specify this quantity. Then, you can select **Allocate Requested**. You are not required to specify the full quantity, but you receive an error if you try to allocate more than the quantity requested. If you must change the quantity selected, drill down again and delete the quantity from the **Pending Picks**, and **Allocate** again.

You can choose not to allocate inventory. If those lines are the only lines on the order, the order is skipped when you drop the order. The order may have lines that do not have a stock status set; those are dropped for picking. The lines you choose not to allocate are not sent for picking.

To inquire on unavailable stock in TWL, in **TWL Outbound-Order Management-Order Inquiry**, on the **Lines** tab, select a line, and click the **Inquiries** button on the grid toolbar. If data is available pertaining to that line, select **Available Quantity**.

Processing a vendor return

See information about entering a return on a counter sale or stock order in the online Help, then, finish processing in **Order Drop Manager**.

1. Select **TWL Outbound > Order Management > Order Drop Manager**.
2. Click **Advanced Search**.
3. Specify this information, and then click **Search**:

   Warehouse

   Specify the TWL warehouse.

   If emergency orders exist, this message is displayed: `Confirmation - There are emergency orders. would you like to view them now?`. Click **`No`**.

   Order Status

   Select **`Open`**.

   Assigned

   Clear this option.

   Not Assigned

   Select this option.

   Order Type

   Select **`Return to Vendor`**.

4. In the grid, select one or more orders, and click **Drop**.
5. If you show the **Return to Vendor** page, in the **Return to Vendor: Unavailable Allocation** page, click the drill down arrow on each line.
6. Click the **Allocate** button to access the **Return to Vendor: Inventory Assignment** page.
7. In **Stock Status**, after reviewing the available quantities, select the stock status to allocate, then click **Auto Allocate**.

   You can assign more than one stock status in the grid by selecting the requested field and clicking **Allocate Requested**.

8. After you have reviewed all lines, then, in the **Return to Vendor: Unavailable Allocation** page, click **Next**. Any line you have drilled down into is marked as Reviewed, whether you assigned inventory or not.
9. In the **Drop summary**, click **Orders Attempted** to review what did, or did not, drop, and why.
10. When you are finished reviewing, click **OK**.

Changing the stock status of a product

You can change the stock status of a return to available for sale, so you can return products to stock. This task is performed in the RF.

Note: Ensure the TWL administrator has activated the **Memo** field for the RF. The administrator can access **TWL Configuration-Adjustment Code**. Then, in the grid, drill down on the appropriate return code and ensure the **`Memo Required`** option is selected.

1. From the RF **Main Menu**, select **Inventory Control**.
2. Select **Stock Adjustment**.
3. Scan or specify the location, pallet ID, product, quantity, new stock status, and stock adjustment code.

   Note: You can also scan a cross-reference barcode instead of scanning the product number. The cross-reference barcode is replaced with the product number. It is replaced as long as the number is set up in TWL and a product with the same number as the barcode does not exist. You can find the parent item using existing item cross-references in the TWL RF **Inventory Control-Item Maintenance-Item XRef**.

   Valid status types are:

   - I: Inventory Hold
   - L: Liquidation
   - O: Overage
   - Q: QA Hold
   - R: Vendor Return
   - S: Scrap
   - T: Transit Damage
   - W: Work-in-process
4. The **Memo/To Loc** field becomes accessible after you specify an adjustment code. Specify the location you are moving the products to. This field creates an audit trail, but the action does not initiate a stock move.
5. When the screen clears, repeat the steps to perform additional changes.

Emergency orders

Emergency orders are orders that contain rush line items. If an order contains line items that have been designated **`Rush`** in **Sales Order Entry**, the **Emergency** button is available in **Order Drop Manager**. If no rush orders exist in the system, the button is unavailable.

Emergency orders have priority and should be filled immediately to satisfy customers requests. If emergency or rush orders are present, you are notified and given the chance to view them before other orders are displayed.

When you open **Order Drop Manager**, and specify a TWL warehouse, the message is displayed: `Confirmation - There are emergency orders. would you like to view them now?`. To process them immediately, click **`Yes`**. To process them at a different time, click **`No`**.

Processing emergency rush orders

Note: If you are picking by zone, link an **TWL Administration-RF Employee** master record to a valid warehouse zone. Then, set a parameter to notify pickers that emergency orders exist after emergency orders are dropped. Parameter 7003, Rush Order Notify, controls the frequency that you are notified of emergency orders.

1. Select **TWL Outbound > Order Management > Order Drop Manager**.
2. In **Warehouse**, specify the TWL warehouse.
3. Click **`Yes`** for the message: `Confirmation - There are emergency orders. would you like to view them now?`

   You can also view Emergency orders by clicking the **Emergency** button on the toolbar.

   Orders with an **Order Type** of **`Emergency`**, an **Order Status** of **`Open`**, and **Not Assigned** are displayed. Drop these orders using the standard drop process.
4. In the grid, you can perform one of these tasks:
   - Select one or more orders, and click **`Drop`**.
   - Select an order, and click **`Zero Ship`**.
   - Select an order, and click **`Update`**; select **`Rush`**, to change the order type to **`Regular`**.

Exceptions

An order exception exists when the system cannot complete an order because the order was skipped when the order was dropped. It cannot complete an order because the order is on hold, or because the order was zero picked. You should review exceptions frequently to ensure orders are filled and inventory corrections are made promptly. The **Exceptions** button is displayed in the **Order Drop Manager** toolbar. The button is only available when exceptions exist.

After you click **Exceptions**, you can use the **Search** pane to filter orders that are shown in the grid. Set the **Exception Type** to one of these options: **`Orders Skipped on Drop`**, **`Ship Complete Hold`**, **`Zero Picked Orders`**, or **`Staged Shipping`**.

Orders skipped on drop

When you drop an order from **Order Drop Manager**, and parameter 0020, Inventory Discrepancy, is set to **`Skip Order`**, then a Skip transaction is created. The order is not dropped. To handle skipped orders on a case-by-case basis, select the line and use the **Drop** or **Zero Ship** options. You can override parameter 0020, in the grid, in the **Drop Discrepancy Handling** column. Select an alternative handling to change how order manager processes lines on the order if a discrepancy with inventory is found.

The **Drop Discrepancy Handling** column is an improvement over previous functionality. That functionality forced orders to drop with a zero ship line instead of parameter 0020 in exception handling. This provides you with more control over what happens with the exception.

Ship complete hold

Ship Complete orders are put on hold if the lines are picked short. These orders are directed to Exceptions and filtered from further processing. To process the order, you can release the hold and continue picking the order. The order types show on the RF picking screens, so the pickers can handle the orders appropriately.

Note: To help locate the inventory required to fill the order, you can search the **Inventory detail**. Drill down an order to access **TWL Order Exception Lines**. Select a line, and click **Inventory**. The **Inventory** detail is displayed in the grid.

Zero picked orders

If a line item cannot be filled because stock cannot be found during picking, the line is zero picked. An order may be dropped and all lines on the order are zero picked because stock cannot be found for any of the line items. In this cases, the order is placed in Exceptions. If parameter 7002, Review Zero Ships, is set to **`Yes`**, you can review zero ships.

If all lines on the order are unpicked, the order can be undropped from **Order Drop Manager**. If you unpick the order on the RF, you are prompted to unpick the zero picked lines. Select **`Yes`** when prompted, and those lines can be picked again without undropping the order through **Order Drop Manager**. Any order that is completely zero picked is available for review in the **TWL Order Exceptions** page. You can re-drop the zero picked orders from the **TWL Order Exceptions** page.

Ship Complete lines that do not have inventory during order dropping are processed as if Parameter 20: Inventory Discrepancy is set to zero ship line. If a Ship Complete line is the only line on the order and it is a zero ship line, then the order is processed as a zero picked order.

Staged shipping

Staged shipping is more a shipping function than an order-drop function. This option is useful if your company has these scenarios:

- uses its own fleet to deliver orders
- stages orders to be transferred to a truck
- makes changes or cancels a packed order at the last minute

You can use the RF to unpick the order and restock inventory without having to issue a return merchandise order and process the RM.

The **`Staged Shipping`** type in the **TWL Order Exceptions** page enables you to review the loaded orders, approve them, and create Ship records to update the system. You can ship individual orders or ship all selected orders. After the Ship records are synchronized, they can be picked up by the **WL Entry Batch Shipping Report** function to update records. Use the **Outstanding Orders** report to help you manage staged shipping.

Note: For Loaded or Staged orders that are shipped through the Staged Shipping exceptions, an active wave might get stranded due to an UnDropped order. For example, if the customer changed their mind. This condition is prevented by the system by enabling the wave record status to be complete. An order may be part of a wave is UnDropped. If all of the remaining orders that are assigned to that wave have been shipped, then the wave can be closed. The status is Complete. Waves assigned to work orders are correctly completed after all work orders for a wave have been created.

If you are integrating TWL with Infor Proof of Delivery (POD), you will use POD to manage order deliveries and capture customer signatures. Any order that is made available to POD must be assigned to a TWL-managed carrier. Any orders assigned to this TWL-managed carrier are automatically assigned to Loaded order status. An order with Loaded status is dropped in **Order Drop Manager**. Warehouse personnel, then, pick, pack, and performs a shipment verification. The Distribution SX.e system is updated and a Sync.Shipment BOD is published to ION. This BOD is available for POD to consume.

Orders with a Loaded status are isolated in the **Order Drop Manager** and can be viewed in the **TWL Order Exceptions** page. In this page, you can find the order and verify that the **Order Status** is **`Loaded`**. This status indicates that the order was sent to the POD application to continue with the order delivery. For orders not fully shipped and updated with POD, use **Order Drop Manager-TWL Order Exceptions** page to manually process the exception.

See the `Infor Distribution SX.e Setup and Administration Guide for Total Warehouse Logistics` for information about integrating TWL orders with Proof of Delivery.

Processing exceptions

Note: If parameter 7002, Review Zero Ships, is set to **`Yes`**, you can review zero shipped orders. More than one occurrence of the same product with the same status may exist on the same order. In that case, the available quantity is reduced by the quantity requested on previous lines of the order. An asterisk (*) is displayed beside the status and a note is displayed on the report.

Note:

1. Select **TWL Outbound > Order Management > Order Drop Manager**.
2. In **Warehouse**, specify the TWL warehouse.
3. Click **`No`** for the message: `Confirmation - There are emergency orders. would you like to view them now?`
4. In **Exception Type**, select a type to filter the results. Use specific steps based on these exception types:
   - **`Orders Skipped on Drop`**
     - Select an order and click **Zero Ship** to zero ship the original order from **Sales Order Entry**.
     - Select an order and click **Drop** to attempt another drop. You can take advantage of the **Drop Discrepancy Type** in the grid.
   - **`Ship Complete Hold`**
     - Select an order and click **Hold** to hold the whole order, rather than a few lines.
     - Select an order and click **Remove Hold** to release the hold.
   - **`Zero Picked Orders`**

    - Select an order and click **Zero Ship** to zero ship the original order from **Sales Order Entry**.
    - Select an order and click **Drop** to drop and attempt to pick again.
- **`Staged Shipping`**
    - Select an order and click **Ship** to ship the order.

5 In **Select Printer**, specify a printer, and click **Next**.

6 In **Drop Summary**, optionally select the line and click **Assign Employees** in the toolbar.

7 In **Assign Employees**, select one or more employees, and click **Submit**.

8 In **Drop Summary**, review the order.

At the end of the drop, you must review from the tabs what is dropped. A tab is displayed only if relevant data for that tab exists.

9 When you are finished reviewing drop information, click **OK**.

Zero ship

If any of the lines on an order cannot be shipped, investigate the differences and make the appropriate stock adjustments to correct the inaccuracies. Then process the order as an exception. An order cannot be shipped for these reasons:

- because of inaccurate inventory balances,
- if a picker was not directed to the correct location,
- if a picker found damaged goods at the location,
- or for any other reason that prevents the line from being filled.

Sufficient inventory to fill an order might exist in the **Product Warehouse Product Setup** balances. However, insufficient inventory in TWL may cause the order to be skipped or zero shipped when you drop the order. This may be based on the parameter 20, Inventory Discrepancy, setting.

An order may be zero shipped in TWL, and the **WL Entry Batch Shipping Report** is run. Depending on the setting of zero ship hold in **SA Administration-Administrator Options**, the order in **Sales Order Entry** may be placed on hold. Holds can be reviewed and released in **Sales Credit Release Inquiry**.

If the **Sales Entry Processing Back Order Fill Report** is generated and a receipt contains the product, the order is printed again. You can update the shipped quantity with the available quantity before the pick ticket is reprinted. Ensure the **`Pick OE BO and S/T Orders Only`** option is cleared in **SA Administration-Administrator Options-Documents-Sales Orders-Back Orders**.

If the system releases a transfer, but nothing can be shipped, you can zero ship the transfer in **Order Drop Manager**. The zero shipped transfer is automatically cancelled by the system. This action removes unprinted back orders that exist. A zero shipped transfer can also occur if the transfer was dropped, but the picker could not pick anything on the transfer. This means the transfer is completed, but nothing is shipped. If the transfer must be filled once, run the **WL Entry Batch Shipping Report**. Then, copy the transfer to another number, because TWL does not process the same number twice.

The **TWL Zero Shipped Orders** report and the **TWL Zero Shipped Items** report are available in **TWL Execution- Reports-Management Reports**. These reports should be reviewed to ensure orders are being handled correctly.

The **WL Zero Shipped Orders Report** lists zero shipped orders that are based on a ship date range. This excludes **Sales Order Entry** lines that are backordered. This report should be run on a regular basis to manage the zero shipped orders, correct procedural flaws, and reconcile quantity discrepancies.

Zero ship lines do not affect inventory quantities.

Zero shipping an order

1. Select **TWL Outbound > Order Management > Order Drop Manager**.
2. In **Warehouse**, specify the TWL warehouse.
3. Click **No** for the message: `Confirmation - There are emergency orders. would you like to view them now?`
4. Click **Exceptions**.
5. In the **Search** pane, in **Exception Type**, select **Zero Picked Orders**, or **Orders Skipped on Drop**.
6. Select an order and click **Zero Ship**.
7. In the **Zero Ship Summary**, you can review what is zero shipped in the order from these tabs:

   Note: A tab is displayed only if relevant data for that tab exists.

   - **Waves**: Waves dropped, and the number of orders tried.
   - **Order Attempted**: Order where the drop was attempted, including whether the drop attempt was successful or not, and why not.
   - **Orders Not Attempted**: Orders that are not attempted. For example, if the order is In-Use, no attempt is made.
8. Click **OK**.
9. Select **Warehouse Logistics > Entry > WLE Reports > Entry Batch Shipping**, and run the **WL Entry Batch Shipping Report**. The zero shipped orders are updated to Stage 1 (Ordered).
10. Select **Sales > Entry > Order**, select **Maintain**, and specify the order number.
11. In **Customer Order Settings**, specify **Yes** in the **Approve** field to release the order from credit hold.
12. Reprint the order with the **Sales Entry Pick Tickets Report** by setting the **Reserve Inventory Before Picking** option to **Yes**. The order goes through the interface and is displayed again in **Order Drop Manager** for processing

Reviewing zero-shipped orders

Use these instructions to generate **WL Zero Shipped Orders Report** and review zero shipments. The orders that are in Stage 1 (Ordered), but are not lost business or return lines, are reviewed. Generate

and review the **WL Zero Shipped Orders Report** regularly. This ensures the source of zero shipments is correct and orders are being fulfilled promptly.

1. In Distribution SX.e, select **Warehouse Logistics > Reports > WL Reports > Zero Shipped Orders Report**.
2. Click **New > One Time**.
3. Specify the report, printing, and scheduling information.
4. Click **Next**.
5. In **Ranges**, specify a date range, or leave the **Ship Date** range blank to include all zero shipped orders. To set the date to include the previous 7 days, you can specify -1 to -7 in the day field. For example, you can specify **`**/-7/**`** in the beginning range and **`**/-2/**`** in the ending range. This setting is the current date less 7 days is used for the beginning date. The current date less 2 days is used for the ending date.
6. In **Options**, in the **Whse** field, specify the TWL warehouse responsible for the zero shipped orders.
7. In **Display Totals Only**, select **`No`** if want to view the report details or **`Yes`** to view only the total number of zero shipped orders.

   Note: If you run this report regularly and anticipate few zero shipments, this option can be used to determine whether zero shipments have occurred. If zero shipments exist, you can rerun the report to obtain the details.
8. In **Show WLAO Zero Approval Hold Code Only**, select **`Yes`** to include zero shipped orders that are placed on hold. The code is based on the **Approve Type for Zero Shipped Orders Placed on Hold** option in **SA Administration-Administrator Options-Logistics-WL Options**. Select the default, **`No`**, to show orders with any approval type. Only orders in Stage 1 (Ordered) show on this report. Lost Business and returned line items are ignored.
9. In **Show Avail - "Y" Approval Hold Code Only**, select **`Yes`** to include orders that are released from zero hold status only. Select the default, **`No`**, to show orders with any approval type.
10. Click **Next**.
11. If you are creating a stored report, specify a job name or number.
12. Click **Save**.

Work orders

Predefined components are combined into prebuilt kits in a kit build department. All materials moved into the kit build department are given a work-in-process stock adjustment code. This code is defined in the parameters. After the kit is completed, the finished item is allocated to orders or put into inventory. Build-on-demand kits are assembled as the components are picked.

VA items are processed like prebuilt kits, but include different phases of fabrication that result in a finished good. VA items often include custom design, engineering, internal and external fabrication, and services that result in an item that is specific for a customer.

The work order number is prefixed with 'w' to distinguish the work order from other types of orders. A VA work order number is prefixed with 'f'.

When a work order is dropped from the **Order Drop Manager**, the components are reserved. These components are displayed on a browse window in the RF **Staging** function. Parameter 2054, Prebuilt Kit Without Inventory, determines whether a prebuilt kit drops to the floor if a required component is not in stock according to TWL. A required component is defined in the **KP Component Setup**.

Dropping a work order

1. Select **TWL Outbound > Order Management > Order Drop Manager**.
2. Click **Advanced Search**.
3. Specify this information, and then click **Search**:

   Warehouse

   Specify the TWL warehouse.

   If emergency orders exist, this message is displayed: `Confirmation - There are emergency orders. would you like to view them now?`. Click **`No`**.

   Order Class

   Select **`Work Order`**.

   You can also filter with the **Order Type** field, by selecting **`Assembly`** or **`Value Add`**, and with the **Order Status** field, by selecting **`Open`**.

4. In the grid, select one or more qualifying orders, and click **Drop**.

   Prebuilt kit work order numbers begin with w. Value add work order numbers begin with f.

5. In **Select Printer**, specify a printer, and click **Next**.

   The **Select Printer** page is prompted based on parameter 2025, Pick Ticket/Label Print, and 0025, Pick Ticket/Label Program, settings. If these parameters are enabled, the page is not displayed in the workflow. After you select the printer, you are not asked to select a printer during subsequent drops in the same **Order Drop Manager** session.

6. In **Drop Summary**, optionally select the wave and click **Assign Employees** in the toolbar.
7. In **Assign Employees**, select a work center employee, and click **Submit**.
8. In **Drop Summary**, you can review what the order from these tabs:

   Note: A tab is displayed only if relevant data for that tab exists.

9. When you are done reviewing orders, click **OK**.

The order remains in Open status, but assigned, until the order is picked.

Pick waves

A wave is a group of orders batched and released to picking according to predefined criteria. Wave parameters can be set to select the orders ready for dropping. Designing pick waves is seldom based

on only one parameter. Waves are defined during your implementation process to determine what criteria best fits your workflow and schedules.

Determine the time that is best suited to each warehouse. For example, individual order picking, wave picking once a day, and wave picking several times a day. Plan your waves based on the best balance of order picking efficiency, space limitations, truck loading efficiency, and customer service. For example, it might seem best to release a pick wave every hour. However, the downstream effects include bottlenecks, congestion, confusion, and timing errors with an outside carrier.

If emergency or rush orders are present, you are notified and given the chance to view them before other orders are displayed. After emergency orders are dropped or ignored, orders that match the parameters are displayed. These orders can be further sorted based on the preferred method to drop the orders. Depending on your operation, you might have a threshold on the size of wave you want to create to optimize the order fulfillment process.

Order modification

You can change any information that does not affect the warehouse, at any time, while you are maintaining an order in **Sales Order Entry**. If you try to change the quantity shipped, quantity ordered, unit of measure, or product, a message is displayed in **Sales Order Entry**. The message asks if these changes affect the warehouse. Specify **`Yes`** to enter changes. If you change information, your document prints according to these rules:

- The order automatically prints after you make changes and close the order, if these settings are specified. In **Sales Order Entry-Initiate-Print**, if **`Automatic Print`** is selected and, in **Print Options** you select the **`Pick Ticket`** option.
- If either the **`Automatic Print`** or **`Pick Ticket`** options are turned off and you change an order, the **Document Print** page is displayed. This page prompts you to print the pick ticket. Manually change the **Pick Ticket** field to **`Yes`**. Then, select the printer options, and print the pick ticket.
- You may you attempt to change an order that is active on the warehouse floor. Active means that the order is in pick, picked, packed, shipped, ship verified, hold, or discrepancy status. If you attempt this change, a message is displayed in **Sales Order Entry**: `WL Order in Process - Warehouse Related Changes Are Not Allowed (6555).`
  Note: If the option, **`Allow Labor Product Change After Shipping`**, is selected in **SA Administrator Options-Logistics-WL Options**, you can add, maintain, or delete a labor line to an order that is in Shipped status in TWL. You are prevented from changing quantities, adding non-labor lines, or deleting an order. If you attempt to make these types of changes, a error is displayed: `WL Order in Process - Only Labor Products can be Added/Changed/Deleted (6560)`, and you cannot save those changes.

An order that has been dropped to the floor has a stage of Open and Assigned, but nothing has been picked. The order can be undropped from the **Order Drop Manager**. Then, it can be changed in **Sales Order Entry**, and the pick ticket can be reprinted.

If an order is released by the system, but nothing can be shipped during order drop, the order is zero shipped. A zero shipped order can also occur if the order was dropped, but the picker cannot pick anything on the order. When this happens, the order can be reviewed in **TWL Order Exceptions** before

the order is zero shipped in **Sales Order Entry**. This means the order is completed, but nothing is shipped.

Sales Order Entry orders that are zero shipped in TWL are placed in Stage 1 (Ordered). These orders are put on credit hold, based on the **Approve Type for Zero Shipped Orders Placed on Hold** option in **SA Administration-Administrator Options-Logistics-WL Options-WL Settings**. If you specify any character other than **Y**, you can release the zero-shipped orders to process them. After you make changes and reprint the order, the order goes through the interface and is displayed again in **Order Drop Manager** for processing.

Un-pick orders from Sales Order Entry

You can un-pick a sales order that has been picked in the **Sales Entry Pick Tickets Report**, and exists in TWL, but has not been dropped. After you have un-picked an order, the order stage reverts from Picked to Ordered. Then, you can make revisions in **Sales Order Entry**.

When you un-pick an order, the stage is reset, and backorders are checked for. An audit history is kept of whether the order has been picked before. Shipped quantities are moved from **Committed** back to **Reserved** in **Product Warehouse Product Setup**.

If you add new lines to an un-picked order, the Ship Complete status is not checked on the new lines when the order is again released to TWL. The status is not required because the suffix is already picked and possibly, the back order was already created.

Conditions and back orders

This un-pick option is available in **Sales Order Entry** when these conditions are met:

- The warehouse must only be a live TWL warehouse; an ESB warehouse cannot be used.
- The order is a Stock Order (SO) and Blanket Release (BR).
- The status of the TWL order must be Open, Un-Dropped, or the order must not yet exist in TWL.
- The sales order must be stage 2 (Picked); the order cannot be in a Shipped, or beyond, stage.

Note: If you do not change the ship date or promise date, the order is picked up again by the next scheduled **Sales Entry Pick Tickets Report**.

If you un-pick an order in **Sales Order Entry**, the quantity of the order is retained on the order. For example, the quantity of what was in shipped quantity when the order was set to a picked stage in **Sales Order Entry** is retained.

To view the number of times an order has been picked, run the **Sales Order Master List Report**. In the **Other Header Information** section of the report, the **# of Times Picked** number records each un-pick. Typically, this number is low, but provides an audit trail and a venue for troubleshooting.

If part of an order contains a backorder, ensure the backorder meets these conditions:

- is in stage 1 (Ordered)
- is not tendered
- is not in use

- has a total quantity shipped of 0.00, meaning nothing has filled on the backorder
- has no new additional lines added

These messages notify you when these conditions are not met:

Message	Action
`Tendered Amt Must be Reversed on BO; Cannot Un-Pick Order (6874)`	Untender the balance from **Sales Order Entry-Collect Payment**.
`Back Order in Use by Another Operator; Cannot Un-Pick Order (6875)`	Contact other user.
`Qty Shipped on Back Order > 0; Cannot Un-Pick Order (6876)`	Undo the backorder.
`Additional Lines Added to Back Order; Cannot Un-Pick Order (6877)`	Undo the additional lines or let the additional lines be lost.
`Back Order Exists in Picked Stage or Greater; Cannot Un-Pick Order (6878)`	Reset the stage to 00.

If the conditions are met with no errors, then the backorder is deleted. Before deleting the backorder, because this is an un-pick, certain information is not validated. Whether the quantity or unit has been changed on a backorder is not validated; those changes are lost. Whether a bank has been set up is not validated and a message is displayed: `Bank Not Set Up in Check Reconciliation – CRSB (4305)`. In addition, because this is an un-pick, these messages are not displayed: `Manually Adjust SRO for Changes Made (6725)`, and `The Tie(s) on the PO#/WT#/VA#/WO# Not Removed, Must Remove Manually (6032)`.

Un-picking orders from Sales Order Entry

1. Select **Sales > Entry > Order**.
2. Click **Maintain**.
3. Specify an order number. This order must be in a TWL warehouse.
4. Click **Next**.
5. In the **Order Status**, select the **`Un-Pick OE Order?`** option.

   The **`Changes Affect the Warehouse?`** option is automatically selected when you select the un-pick option. This is because the un-pick change does affect the warehouse. However, be aware that the **`Changes Affect the Warehouse?`** option still works independently if you were not performing an un-pick.

6 Click **Next**.

The order stage reverts from Picked to Ordered. Verify this in **Sales Order Details**. Now you can, for example, revise the ship date in **Sales Order Entry**.

Transfer modification

Warehouse transfers can be changed in a manner similar to customer orders. You can change the shipto warehouse on the transfer, regardless of the transfer stage.

If your TWL warehouse is the shipping warehouse for a warehouse transfer, you can change transfers that have not been dropped to the floor; that is, an open, unassigned transfer. Access **Transfer Entry** in change mode and bring up a transfer that has been released to TWL, but has not been dropped to the floor.

As you continue, the transfer line items are displayed and you can make further changes to the transfer. If you continue from a blank line, the **Document Print** page is displayed automatically. You can reprint the transfer and release the new information to TWL. The changed transfer is displayed in **Order Drop Manager** and can be dropped for picking.

If a transfer is released by the system, but nothing can be shipped, you can zero ship the transfer in **Order Drop Manager**. The zero-shipped transfer is automatically cancelled by the system and unprinted backorders that might exist are removed. A zero-shipped transfer can also occur if the transfer was dropped, but the picker could not pick anything on the transfer. This means the transfer is completed, but nothing is shipped. If the transfer must be filled once, run the **WL Entry Batch Shipping Report**. Then, copy the transfer to another number, because TWL does not process the same number twice

You may you attempt to change a transfer that is active on the warehouse floor. Active means that the order is in pick, picked, packed, shipped, ship verified, hold, or discrepancy status. If you attempt this change, a message is displayed in **Transfer Entry** indicating the TWL order is in process and other changes cannot be made.

As with orders, you can make changes to these transfers as long as the changes do not affect the warehouse. For example, you can change the freight charges, but changes to the quantity or product cannot be made. If changes that affect the warehouse must be made, have the person responsible for the transfer contact you so you can undrop the transfer.

Backorder creation

The backorders that are generated for orders created for TWL warehouses are controlled by the system. The **Create OE Back Orders At Which Stage** option in **SA Administration-Administrator Options-Documents-Sales Orders-Back Orders** controls when backorders are created for customer orders. Backorders can be created during Stage 1 (Ordered), Stage 2 (Picked), Stage 3 (Shipped), or Stage 4 (Invoiced).

To prevent timing issues with creating backorders, in live TWL warehouses, backorders are created during Stage 2 (Picked), regardless of the setting. All other warehouses on your system adhere to the assigned **SA Administration-Administrator Options-Documents-Sales Orders-Back Orders** setting.

See information about creating a split release in the online Help.

An exception to these settings is an override available for limited use from **Product Warehouse Description Setup**. This override enables you to create backorders at Stage 3 (Shipping) for individual warehouses with the **Create Order Entry Back Orders At Stage** option in **SA Administration-Administrator Options-Documents-Sales Orders-Back Orders**. Contact your application consultant before to using the override.

There may be active backorders for a TWL warehouse. If the quantity that could be shipped to the customer on one of the backorders is changed, the TWL order is placed on hold. This indicates an inventory discrepancy that requires an immediate correction, allowing you can research the problem.

For example, a customer places an order for product ABC with a quantity of 50. At the time the order is entered, 30 products are displayed as in stock and a backorder for 20 is created by the system. When the order is picked, only 25 could be found in the TWL warehouse. The order is picked short and packed. After the order is shipped in a shipping interface, 5 is added to the original backorder for a new backordered quantity of 25. This can be viewed in **Sales Order Inquiry**.

The code you specify for the **Approve Type for Zero Shipped Orders Placed on Hold** option in **SA Administration-Administrator Options-Logistics-WL Options** identifies zero-shipped orders. If that code is blank, the default hold code is z. To ship the backorder, locate the inventory discrepancy by performing a cycle count. Make the necessary stock adjustment in TWL to update the on-hand balance.

Change the **Approval** code on the order header in **Sales Order Entry** or **Sales Shipping Feedback Entry** to release the backorder. Then, change the **Qty Ship** field on the **Extended** view. Then, reprint the backorder to re-release the order to TWL. To avoid shipping the backorder with the new quantity, select the order number and suffix in **Sales Order Entry**. Then, access the header, and select **Delete**.

Selecting **`Lost Business`** enables you to generate a sales report of the reasons the order was cancelled. Select **Delete** to delete all evidence of the order.

Labor products

Labor products represent a service, rather than a tangible product. The service may include related labor products, such as inspection, assembly, or equipment delivery. The service may also include products related to the requested service.

Prices, costs, and discounts for labor products are tracked by the system, but inventory quantities are not. The activities in the warehouse are controlled by TWL. Because of this control, labor products are tracked when **`Yes`** is selected for parameter 2028, Labor Items.

You can create pick requests for labor products. You can pick the product, automatically ship the product when the order is dropped, and zero ship or unpick a labor product. This table show the options in **TWL Configuration-Item-General-Labor** for handling labor products:

If	Then
you accept the default **Pick**,	labor products are automatically picked. This option enables you to short pick a labor product, if parameter 1050, Picking Options, is set to enable short picking. Then undrop an order that contains a labor product.
you select **Auto Ship**,	the line containing the labor product is shipped automatically when you drop the order.
you select **Zero Ship**,	the line containing the labor product is shipped automatically when you drop the order.
No is selected for parameter 2028, Labor Items,	you can either automatically ship labor products when you drop an order, or zero ship the labor product when you drop the order.

Lot products

In **SA-Administration-Administrator Options-Documents-Sales Orders-Entry Settings**, the **Force Lot/Serial Input** option must be selected. This setting enables you assign lot numbers from Distribution SX.e when you enter the order. Specify only one lot per line. Otherwise, the lot is not released to TWL for suggested picking.

The first available lot is found by TWL based on the assigned location type that contains the largest quantity of available stock. If the location type is not specified, lots are selected alphabetically. When the product has an expiration date, that date is checked by TWL. This validation ensures that date is greater than the date you drop the order.

TWL as alternate warehouse

Note: You can select your warehouse from the **Search** pane or in **Advanced Search**.

A TWL-controlled warehouse can be set up as an alternate warehouse for another TWL warehouse. This is initiated in **Product Extended Warehouse Cross Reference Setup**. This setup uses the alternate warehouse functionality that creates an automatic warehouse transfer for specific situations. For example, during **Sales Order Entry**, insufficient inventory may exist in the selling warehouse. So, a transfer is created for an alternate warehouse with inventory to fill the order. When the sales order is finished, the alternate warehouse selected for each line is sent to **Order Drop Manager**.

To select and drop to an alternate warehouse, you must have security, which is set in**SA Operator Setup**.

When the order is dropped with **Order Drop Manager**, a summary of the zones and picks across all applicable warehouses is displayed. This summary is displayed on the **Picking Zones** tab in **TWL Outbound-Wave Inquiry**. You can view any inventory that is reserved in the alternate warehouse by the selling warehouse. Access **TWL Configuration-Item**. Drill down on an appropriate record, and select **Inquiries > Reserved**.

Stock is allocated, picked, and shipped from the selling warehouse since the inventory has been auto transferred from the alternate warehouse. During picking, the RF operator is notified when an order is dropped for an alternate warehouse. When the operator navigates to the alternate warehouse, the operator sees those lines designated on the RF unit; the lines are separated by the warehouse zones within each alternate warehouse.

When an alternate warehouse pick occurs, a transaction type of Auto Transfer (AT) is created. The AT reduces the on hand in the alternate warehouse. A second AT transaction is created to increase the on hand in the selling warehouse.

After the order is shipped in TWL and processed in the system, all inventory updates occur and both warehouses balance. These are other important factors to note:

- Alternate warehouses must be within a single Distribution SX.e company.
- Alternate warehouses must be virtual warehouses existing within the physical four walls of the selling warehouse.
- Multiple alternate warehouses can be assigned to a selling warehouse in **Product Extended Warehouse Cross Reference Setup**, but those warehouses must all be TWL-controlled warehouses.
- Multiple alternate warehouses can be considered when entering a sales order, but only one alternate warehouse can be selected to fill the line. If the inventory is not in the warehouse specified, no other warehouses are checked. Parameter 20, Inventory Discrepancy, for the selling warehouse determines what allocation steps should be taken on the order.

Appendix A: TWL Web RF Shortcut Keys

This table shows the TWL Web RF shortcut keys and their functions:

Shortcut Key	Action
Down arrow	• **Carton Lookup** Displays all carton lookups • **Location Look up** Highlights any RF function containing a lookup • **Perform Product Lookup** Activates item lookup • **Unit Lookup** Displays all unit lookups
Alt+A	**Add a Note** Creates notes from any applicable Picking and Receiving functions
Alt+L	**Change Zebra Printers** Changes zebra printers in any Set Label Printer menu and menu option in the System Inquiry menu
Alt+N	**View Notes/Comments** View notes and comments from any applicable function
Alt+P	**Change Laser Printers** Reprints receipt labels from any menu
Alt+R or **F6**	**Reprint Label** Changes laser printers in any Set Report Printer menu and menu option in the System Inquiry menu

Shortcut Key	Action
Alt+S	**Skip Pick** Skips a pick in the **Order Picking** screen. You can also press the **Skip Pick** button that is located in the header of the **Order Picking** screen.
Ctrl+A	• **Create X-Ref** Creates cross references from the Stock Receiving data grid. You can also select the barcode icon or highlight the barcode field and press **Enter** • **Add Line Order** Adds a pick to a line item in the **Order Picking Detail** menu
Ctrl+D	**Send Line to Lost Business from Sales Order** Moves the pick to Lost Business. This function is triggered in the **Order Picking Detail** menu.
Ctrl+P	**Change Product on Line Item** Changes pick by selecting a new product. This function is triggered in the **Order Picking Detail**.
F4+**X** or **Back** button	**Back** Navigates back from any menu function and grid **Note:** You can only press **F4** and the **Back** button in the RF browser to navigate back from menus with editable cells
F6	**Item Details** Displays item details from any item lookup with an active row in any grid with an Item column
F7	**Get Staging** Displays the staging menu from any menu screen and menu options in the **Controls** menu
F8	**Store Staging** Access store staging from menu screens and menu options in the **Controls** menu
F9	**Reprint Pack Slip** Reprints pack slips in any **Print Packing Slip** menu and menu option in the **Controls** menu

Press **Enter** to change the edit mode of a cell. If the cell is equipped with control that uses a down arrow, then the control opens when you press **Enter**. Editable cells without controls switch to edit mode automatically when you specify a value or click in the cell. You are not required to press **Enter**.

Appendix B: Troubleshooting

This section provides answers to some common questions you may encounter when managing orders in TWL. Additional information is available by contacting Infor Support.

Dropped order does not find available inventory

Cause: Pick sequence is setup incorrectly.

Solution: When you attempt to drop the order, the **Drop Summary** page is displayed. Select the **Orders Attempted** tab and determine what sequence was used during order dropping. The sequence is displayed in the **Message** column. Next, go to **TWL Outbound-Picking-Pick Sequence**. In the setup, find the sequence and determine if the **Selected** column includes the area of the warehouse your inventory is located.

Appendix C: Reference information

This information is provided as additional reference information.

Module-function reference

These tables list the TWL Web module function name for both the WebUI menu location and the corresponding previous graphical interface (GUI) location.

In the WebUI menu, the TWL Web module functions are organized into these categories:

- **TWL Administration**
- **TWL Configuration**
- **TWL Execution**
- **TWL Inbound**
- **TWL Outbound**

TWL Administration

This table shows the previous GUI menu path and the current WebUI menu path for this category.

GUI menu path	WebUI menu path	Acronym
Main Menu > Master Files > Company	TWL Administration > Company	twlac
Main Menu > Master Files > Employee	TWL Administration > RF Employee	twlae
Main Menu > Master Files > Shift	TWL Administration > Shift	twlas
Main Menu > Master Files > Station	TWL Administration > Station	twlat
Main Menu > Master Files >Department	TWL Administration > Department	twlad
Main menu > Options > Display Database Connections	TWL Administration > Database Connection	twladc
Main Menu > Reports > Productivity	TWL Administration > Reports > Productivity Reports	twlrp

GUI menu path	WebUI menu path	Acronym
Main Menu > System Setup > Interfaces > Interface Layout	TWL Administration > Interface > Interface Inquiry	twlail
Main Menu > System Setup > Interfaces > Resend	TWL Administration > Interface > Interface Resend	twlair
Main Menu > System Setup > Label Setup	TWL Administration > Label	twlal
Main Menu > System Setup > Printers	TWL Administration > Printer	twlap
Main Menu > System Setup > System Parameters	TWL Administration > System Parameter	twlasp
Main Menu > System Setup > User Specific Config	TWL Administration > User Specific Configuration	twlau

TWL Configuration

This table shows the previous GUI menu path and the current WebUI menu path for this category.

GUI menu path	WebUI menu path	Acronym
Main Menu > Master Files > Inventory Detail [see 'Modules > Inventory Control > Inventory Detail']	TWL Configuration > Inventory Detail	twlcin
Main Menu > Master Files > Item	TWL Configuration > Item	twlci
Main Menu > Master Files > Location	TWL Configuration > Location	twlcl
Main Menu > Master Files > Location-Create	TWL Configuration >Multiple Location Create	twlclm
Main Menu > Master Files > Unit of Measure	TWL Configuration > Unit of Measure	twlcu
Main Menu > Master Files > Warehouse Zone	TWL Configuration > Warehouse Zone	twlcz
Main Menu > Master Files > Warehouse >System Setup > Warehouse Parameters	TWL Configuration > Warehouse	twlcw
Main Menu > Modules > Inventory Control > ABC Classification	TWL Configuration > ABC Classification	twlabc
Main Menu > Modules > Inventory Control > Adjustment Code	TWL Configuration > Adjustment Code	twlca

GUI menu path	WebUI menu path	Acronym
Main Menu > Modules > Inventory Control > Return Reason Codes	TWL Configuration > Return Reason Code	twlcr
Main Menu > Modules > Labels [location labels] Main Menu > Modules > Labels [carton label printing]	TWL Configuration > Label Printing	twlclp
Main Menu > Reports > Master	TWL Configuration > Reports > Master Reports	twlrmst
Main Menu > System Setup > Alternate Location	TWL Configuration > Alternate Location	twlcla
Main Menu > System Setup > End of Day (EOD)	TWL Configuration > End of Day > End of Day Configuration	twlceod
Main Menu > System Setup > File Retention (EOD)	TWL Configuration > End of Day > File Retention	twlcefr

TWL Execution

This table shows the previous GUI menu path and the current WebUI menu path for this category.

GUI menu path	WebUI menu path	Acronym
Main Menu > Modules > Inventory Control > Cycle Count Master > Create	TWL Execution > Cycle Count > Create	twlecc
Main Menu > Modules > Inventory Control > Cycle Count Master > Inquiry	TWL Execution > Cycle Count > Inquiry	twleci
Main Menu > Modules > Inventory Control > Cycle Count Master > Options > Inventory Counts Setup	TWL Execution > Cycle Count > Setup	twlecs
Main Menu > Modules > Inventory Control > Inventory Discrepancies	TWL Execution > Inventory Discrepancy	twlei
Main Menu > Modules > Inventory Control > Physical Inventory	TWL Execution > Physical Inventory	twlep
Main Menu > Modules > Inventory Control > Replenishments > Consolidate Non-Primaries	TWL Execution > Replenishment > Consolidate Non-Primary	twlerc
Main Menu > Modules > Inventory Control > Replenishments > Top Off Primaries	TWL Execution > Replenishments > Top Off Primary	twlert
Main Menu > Modules > Inventory Control > Replenishments > View Pending	TWL Execution > Replenishments > View Pending	twlerp

GUI menu path	WebUI menu path	Acronym
Main Menu > Reports > Inventory	TWL Execution > Reports > Inventory Reports	twlrinv
Main Menu > Reports > Management	TWL Execution > Reports > Management Reports	twlrmg

TWL Inbound

This table shows the previous GUI menu path and the current WebUI menu path for this category. This category includes inbound transactions such as receipts, return orders, and inbound warehouse transfers.

GUI menu path	WebUI menu path	Acronym
Main Menu > Master Files > Vendor Information	TWL Inbound > Vendor Information	twliv
Main Menu > Modules > Receiving > Packing List Entry	TWL Inbound > Packing List Entry	twlip
Main Menu > Modules > Receiving > Receipt Master	TWL Inbound > Receipt Inquiry	twlir
Main Menu > Reports > Inbound	TWL Inbound > Reports > Inbound Reports	twlrin

TWL Outbound

This table shows the previous GUI menu path and the current WebUI menu path for this category. This category includes transactions such as purchase orders, return purchase orders, and outbound warehouse transfers.

GUI menu path	WebUI menu path	Acronym
Main Menu > Modules > Orders > Auto Drop Log	TWL Outbound > Auto Drop > Auto Drop Log	twloal
Main Menu > Modules > Orders > Auto Drop Rules	TWL Outbound > Auto Drop > Auto Drop Rule	twloar
Main Menu > Modules > Orders > Carton Sizes	TWL Outbound > Shipping > Carton Size	twlocs
Main Menu > Modules > Orders > Enable Auto Drop	TWL Outbound > Auto Drop > Auto Drop Enable	twloae

GUI menu path	WebUI menu path	Acronym
Main Menu > Modules > Orders > Order Carton Info	TWL Outbound > Shipping > Order Carton Info	twloc
Main Menu > Modules > Orders > Order Inquiry	TWL Outbound > Order Management > Order Inquiry	twlooi
Main Menu > Modules > Orders > Order Manager	TWL Outbound > Order Management	twlom
Main Menu > Modules > Orders > Order Manager	TWL Outbound > Order Management > Order Drop Manager	twlom
Main Menu > Modules > Orders > Order Manager > Edit > Order Drop Criteria > Warehouse Pick Creation Criteria Setup Screen	TWL Outbound > Picking > Pick Sequence	twlops
Main Menu > Modules > Orders > Order Manager > Undropped > Drop > Order Drop Sequence Criteria > Employee	TWL Outbound > Order Management > Employee Wave Assignments	twloe
Main Menu > Modules > Orders > Order Manager > View > Order Count Status > Undropped Open Orders Status	TWL Outbound > Order Management > Dropped Order Status	twloms
Main Menu > Modules > Picking > Product Categories	TWL Outbound > Picking > Product Category	twlop
Main Menu > Modules > Shipping > Carrier Master	TWL Outbound > Shipping > Carrier Master	twlocm
Main Menu > Modules > Shipping > Dock Master	TWL Outbound > Shipping > Dock Master	twlod
Main Menu > Modules > Shipping > Shipping Manifest	TWL Outbound > Shipping > Shipping Manifest	twlosm
Main Menu > Reports > Outbound Reports	TWL Outbound > Reports > Outbound Reports	twlrout
Information Explorer	TWL Outbound > Order Management > Order Inquiry TWL Outbound > Order Management > Order Inquiry [drill down an order, Lines tab, Inquiries button] TWL Outbound > Order Management > Wave Inquiry	twlooi twlow

Communication file structure descriptions

TWL and the system modules use a designated file structure to communicate data. This section describes the structure of these files:

- WLET Driver file
- WLEM Master file
- WLEH Order Header file
- WLEL Line Item file

WLET Driver file

This table shows the fields and descriptions for the WLET Driver file:

Field	Description
Stat	These status types are listed in the file as a letter: • A: Active; records are ready for processing • I: Inactive; records have been processed and are ready for deletion • O: Open; records are in the process of building the transaction files in the system • E: Error; records were found during processing • W: Work in Process; records are in the process of being transmitted • V: Vendor Return; records are held for manual release
Created	The date and time the file was created.
Type	These types are listed in the file as a three-character code: • MST: Master Record • PCK: Picking Record • PRT: Packing List Record • SHP: Shipping Record • RCV: Receiving Record • INV: Inventory Adjustment • PRE: Pre-Receiving Record • BCD: Barcode Record
Whse	The TWL warehouse name.
Last Updated	Your initials and last date and time the record was updated.

Field	Description
Set #	A unique sequencing number that changes incrementally. The number is created by combining these items: • Year • Month • Day • Time, seconds from midnight • Randomly generated number, such as 06 For example, for a record created on 05/02/18 at 10:00 AM, the set number 200605023600018 is assigned.

WLEM Master file

This table shows the fields and descriptions for the WLEM Master file:

Field	Description
Actual Qty	The actual quantity that is entered into the system, expressed in stocking units.
Address	The address from the master file.
Adjustment Code	The adjustment code is sent by TWL based on the transaction.
Adjustment Reason	The transaction type from TWL.
Analysis Code	The ABC Classification code from **Product Warehouse Product Setup-WL Setup** that is released to TWL.
Bin Loc 1	The bin locations on the **Product Warehouse Product Setup** record.
Bin Loc 2	The bin locations on the **Product Warehouse Product Setup** record.
Case Qty	The field from the **Product Warehouse Product Setup-WL Setup** that is released to TWL.
Category	The product category from the **Product Setup** record.
Code/Carrier	The **SA Table Code Value Setup** record that is being transferred to TWL.
Counter Bin	The counter location from **Product Warehouse Product Setup-WL Setup** that is released to TWL.
Country	The country in which the TWL warehouse resides.
Cross Reference	The vendor's part number.
Cube	The product's cubic dimensions from **Product Setup**.

Field	Description
DUNS #	The number from the **Vendor Setup** that is released to TWL.
EDI Cd	The EDI code from **Vendor Setup** that is released to TWL.
Expected Qty	The quantity that the system expected. The quantity is expressed in stocking units.
Extended Type	The product's serial or lot designation from the **Product Warehouse Product Setup** record.
Fax Phone	The fax number from **Vendor Setup** that is released to TWL.
Function	The system function that contains the static data. These functions are listed in the file as a character code: • icsp: **Product Setup** • icsw: **Product Warehouse Product Setup** • icsd: **Product Warehouse Description Setup** • sasc: **SA Company Setup** • sastt: **SA Table Code Value Setup** • wtee: **Transfer Exception Receipt Entry** • wl: **Warehouse Logistics**
Height	The product's height from the **Product Setup** record.
Inner Pack	The field from the **Product Warehouse Product Setup-WL Setup** that is released to TWL.
Kit Build Dept	The department the prebuilt kit is assembled in, from the **Product Warehouse Product Setup-WL Setup** that is released to TWL.
Kit Type	If the product is a kit, the type of kit from **Product Setup** is displayed.
Length	The product's length, from the **Product Setup** record.
MSDS Product	Indicates whether this product requires an MSDS sheet.
MSDS Sheet #	The information sheet that is associated with the MSDS product.
Name	Depending on the master file, the name of the company or warehouse, for example.
Our Product	The system product number that is cross-referenced to a vendor's product number.
Pallet Qty	The field from the **Product Warehouse Product Setup-WL Setup** that is released to TWL.
Phone	The phone number from **Vendor Setup** that is released to TWL.
Product	The system's product name.
Salesrep	The sales representative from **Vendor Setup** that is released to TWL.
Ship From	The ship-from location from **Vendor Setup** that is released to TWL.

Field	Description
Spec/Non-stock	For stock adjustments, the special or nonstock designation.
Stat	These status types are listed in the file as a letter: • A: Active; records are ready for processing • I: Inactive; records have been processed and are ready for deletion • O: Open; records are in the process of building the transaction files in the system • E: Error; records were found during processing • W: Work in Process; records are in the process of being transmitted • V: Vendor Return; records are held for manual release
Status	The **Product Setup** or **Product Warehouse Product Setup** product status.
Stk Qty	The number of stocking units in a cross-reference unit for a product.
Table Type	The **SA Table Code Value Setup** type that is transferred to TWL.
Type	The cross-reference type.
Unit/Unit Stock	The stocking unit from the product's **Product Setup** record.
Update Type	These transactions are listed in the file as: • a: add • c: change • d: delete
Vendor #	The **Vendor Setup** vendor number that is released to TWL.
Weight	The product's weight, from the **Product Setup** record.
Whse Zone	The field from the **Product Warehouse Product Setup-WL Setup** that is released to TWL.
Width	The product's width, from the **Product Setup** record.

WLEH Order Header file

This table shows the fields and descriptions for values in the WLEH order header file:

Field	Description
Cust/Vend/Whse	The customer, vendor, or warehouse name or number.
Order #	The order number and suffix.

Field	Description
OrdTy	Order types are listed in the file as: • c: Customer order • p: Purchase order • t: Transfer • w: Work order
Priority	A value from 1 to 10. 1 is low priority, 5 is the default, and 10 is the highest priority.
Stat	Status types are listed in the file as: • A: Active; records are ready for processing • I: Inactive; records have been processed and are ready for deletion • O: Open; records are in the process of building the transaction files in the system • E: Error; records were found during processing • W: Work in Process; records are in the process of being transmitted • V: Vendor Return; records are held for manual release
TransID	Not currently used.
TransTy	Transactions are listed in the file as: • S: Counter Sale • E: Emergency • H: Tag & Hold • R: Regular • T: Transfer • V: Vendor Return • W: Will Call • X: Cross Docking
UpdTy	Transactions update types are listed in the file as: • a: add • c: change • d: delete

WLEL Line Item file

This table shows the fields and descriptions for values in the WLEL line item file:

Field	Description
Bin Loc	The TWL location that is related to this transaction.
Entry Dt	The date the order was created.
Ext	The serial or lot type.
N	The special or nonstock designation.

Field	Description
Ln	The line number.
Product	The product or cross-referenced product number.
Quantity	Quantity ordered.
Stat	Status types are listed in the file as: • A: Active; records are ready for processing • I: Inactive; records have been processed and are ready for deletion • O: Open; records are in the process of building the transaction files in the system • E: Error; records were found during processing • W: Work in Process; records are in the process of being transmitted • V: Vendor Return; records are held for manual release
Trans ID	Not currently used.
Unavail	The quantity unavailable.
UpdTy	Transaction update types are listed in the file as: • a: add • c: change • d: delete
WLELK	The WLELK file contains the component information for each kit-specific line item. The WLELK file interfaces with these functions: • **Sales Order Entry** • Kit Production • TWL kit activity, assemblies and disassemblies
WLELS	The WLELS file contains serial and lot information.

Process type descriptions

A process type is the transmission type that identifies the master file or transaction file information being transmitted between Distribution SX.e and TWL.

This table shows the process type, indicates whether the transmission is sent or received, and provides a description of the source of the information transmitted:

Type	Direction	Description
Master	Send	Master records sent from the system to TWL. These files are included in the master file process: • **Product Warehouse Description Setup** • **Product Setup** • **Product Warehouse Product Setup** • **Product Extended Product Cross Reference Setup** • **Product UPC Number Setup** • **SL Entry Update Products Report** • **Vendor Setup** • **Vendor Ship From Setup** • **SA Table Code Value Setup**
Order Drop Manager	Send	This type of transaction is created when you print an order for a TWL warehouse. These specific files are included in the picking process: • **Sales Entry Pick Tickets Report** • **Transfer Entry Print Warehouse Transfer Report** • **KP Entry Print Work Orders Report** • **Purchase Entry Processing Print POs Report** (Vendor Return) • **VA Entry Processing Internal Value Add Print Report** • **VA Entry Processing Pick Tickets Report**
Pre-Receive	Send	This type of transaction is created when you print a purchase order for a TWL warehouse. These specific files initiate the pre-receiving release: • **Purchase Entry Processing Print POs Report** • **Sales Entry Pick Tickets Report** [Customer Returns] • **Transfer Shipping Feedback Entry** [Receiving Warehouse]
Ship	Send	A SHP transaction is released to TWL to update the order to shipped if all these circumstances exist: • You are shipping from the order entry system or a shipping interface • You have set the TWL carrier in TWL to **`Host`**
WT Exception	Send	Sent when a discrepancy occurs between the shipping warehouse and receiving warehouse, the product is flagged for a cycle count through the **Transfer Exception Receipt Entry** function.
Barcode	Receive	This transaction is received by the system to add, change, or remove barcodes from TWL.

Type	Direction	Description
Master synchronize	Receive	Master records sent from TWL to the system. The master file process includes this updated data: • Case quantity • Counter bin • Error message • Inner pack • Kit build department • Pallet quantity • Product zone If applicable, the system updates the **Product Warehouse Product Setup** record. Synchronized information is displayed in **WL Transaction Inquiry**.
Packed Order	Receive	This transaction type is created when an entire order is packed and the carrier is managed by the host. The PAK transaction must be in **WL Transaction Inquiry** if you are using a shipping interface or if you are printing a custom system packing slip. During these processes, the PAK transaction updates the system with the actual quantity shipped for each line. A PAK transaction is not created in **WL Transaction Inquiry** for Counter Sales orders, regardless of the carrier shipping type that is assigned to the order. Counter Sales orders are typically not shipped.
Print Pack	Receive	This type is created when an order is picked in TWL, and can be removed and recreated multiple times to reprint packing lists without interfacing to a shipping interface. The option is to use the system Packing List and printer that are specified on the Carrier master record in TWL. The PRT transaction has the same functionality as the PAK transaction when the system is updated.
Received Order	Receive	This transaction is created after the receipt is complete and the receipt transaction (RT) is closed. In the system, the purchase order remains in Stage 2 (Printed) until the **WL Entry Batch Receiving Report** initiates these functions when receiving has been completed: • **Purchase Entry Receipt of Inventory** • **Transfer Entry Receipt of Inventory** • **Sales Order Entry** (Customer Returns) • **KP Work Order Center Entry-Accept** • **VA Entry Receipt of Inventory**
Shipped Order	Receive	This transaction type is created when an order is ship-verified in TWL for a TWL-managed carrier. The ship-verify function is performed on each carton associated with an order. An order is updated to shipped stage in TWL after the last carton associated with the order is ship-verified. The order remains in Stage 2 (Picked) in the order entry system until the **WL Entry Batch Shipping Report** is run. Then the order is updated to Stage 3 (Shipped) if the transaction processes without error.

Type	Direction	Description
Stock Adjustment	Receive	This type of transaction is created after a TWL stock adjustment is completed. The system is updated when the **WL Entry Batch Adjust Inventory Report** is processed. These exceptions may occur: • If the TWL and system quantities match, but the quantities are incorrect, make an adjustment on the RF and use a valid **SA Table Code Value Setup** adjustment code. • If the TWL quantity is correct, but the system quantity is incorrect, make an adjustment in **Product Qty Adjustments Entry**. • If the system quantity is correct but the TWL quantity is incorrect, make an adjustment on the RF with the TWL adjustment code. This affects the TWL quantity, but does not affect the system. Use of these scenarios should be extremely rare. Before making an adjustment to the system or TWL only, verify all transactions are processed.

Communication exception descriptions

We recommend that you monitor **WL Transaction Inquiry** transactions daily and review exceptions or errors. This table shows, for each process type, the associated error message, whether the transaction is sent or received, and the cause or corrective action:

Type	Direction	Error	Cause or corrective action
Order Drop Manager	Send	Order Released For Picking	The order was reprinted. The order is already in TWL and is being picked. You can try to inactivate the error. You must undrop the order in **Order Drop Manager** and reprint the order in the **Sales Entry Pick Tickets Report** to release to TWL. You cannot change the order in **Sales Order Entry** if the order is dropped.
Order Drop Manager	Send	Order Not Found	The order does not contain line items. Change the status to inactive.
Pre-Receive	Send	Record Not Found	The purchase order was printed, but no line items exist. You can add lines to the purchase order and reprint the purchase order, or inactivate the transaction that erred.
Received Orders	Receive	Stage Not Valid (PO)	All or part of a purchase order is received in the system through **Purchase Entry Receipt of Inventory** before the order is received in TWL. If you use the system correctly, all receipts originate from TWL, you should never receive this error.

Type	Direction	Error	Cause or corrective action
Received Orders	Receive	Stage Not Valid (WT)	A warehouse transfer is in Stage 5 (Exception) or Stage 6 (Received). Clear the exception receipts and receive the transfer in the system. The received transfers were processed in **Transfer Entry Receipt of Inventory** before being received in TWL. If you use the system correctly, all receipts originate from TWL, you should never receive this error.
Received Orders	Receive	PO In Use By XXXX	Another user was updating the record while you were processing a RCV transaction. Wait until the user is finished with the record and resubmit the transaction for processing.
Received Orders	Receive	Units Not Set Up In Unit Table - ICSEU or SASTT	The product was not set up correctly in the system before the purchase order was created. Process this transaction in **Purchase Entry Receipt of Inventory**.
Shipped Orders	Receive	Order Cannot Be Maintained After Shipping	The order was processed in **Sales Shipping Feedback Entry**, which should be the exception rather than the rule.
Stock Adjustment	Receive	BOD Kit Not Allowed	Perform a stock adjustment for each component, using a valid **SA Table Code Value Setup** adjustment code. If the product is not a build-on-demand kit, then change the **Product Setup** record to correct.
Stock Adjustment	Receive	Quantity Cannot Be > On Hand Minus Committed	If you are adjusting an unavailable quantity, then make a positive adjustment on the RF for the unavailable quantity without an unavailable code. Make an adjustment for the unavailable quantity using a valid unavailable status code.
Stock Adjustment	Receive	Negative Adjustment Cannot Exceed ICSW Qty On Hand	In the system, the on-hand quantity is less than the on-hand quantity in TWL. This is caused by unprocessed transactions. Use these steps to correct the issue: **1** Check for receipt transactions against this product in TWL and close the RT; **2** Run the **WL Entry Batch Receiving Report**, the **WL Entry Batch Shipping Report**, and the **WL Entry Batch Adjust Inventory Report** to update the system with active data; and **3** Process the appropriate adjustment in the system.
Stock Adjustment	Receive	Cannot Be > Unavailable Qty For the Reason Unavailable Type Selected	The unavailable reason codes in system and TWL are different. Check the **SA Table Code Value Setup** Return/Adjust Reasons [type M] and Reason Unavailable [type L] codes for setup problems. Process the appropriate adjustment in the system.

Order Management parameters

In TWL Web module, parameters are set to ensure the system is performing according to your company's operational standards. Your tasks are affected by how your TWL administrator set up system parameters. Ensure your TWL administrator has set these parameters to reflect your needs. For your information, task-related parameters are described in this section. The name, parameter type, level, value, and description are provided for each parameter. The default for each parameter is identified as [default].

Parameter ID:0018

Name
Order Drop Criteria

Parameter Type
Order Management

Level
Global

Value
Select one or more of these values:

- Cross Dock
- Full Pallet
- Pallet Primary
- Case Primary
- Split-Case Primary
- Zone Pick Sequence
- FIFO
- Counter Primary
- Counter Zone

Description
Default Order Drop Criteria Values.
These are the default criteria types available when assigning order drop sequences through the Order Drop Manager.
Any change to this parameter requires changes to the order drop allocation code!

Parameter ID:0020

Name
Inventory Discrepancy

Parameter Type
Order Management

Level
Warehouse

Value
- Adjust Quantity
- Zero Ship Line
- Skip Order
- Hold Order for Partial Fill [default]

Description
Inventory Discrepancy
The inventory quantity parameter is assigned to establish how to handle inventory discrepancies when dropping orders. Example, the order requests 50 and the warehouse has 35.
Order dropping is a two step process. The first step allocates an entire order. The second step is to create the necessary picks, replenishments, and stock movements for the order and wave. All the options below occur during the first step.
The options are:
1) Adjust Quantity
Automatically adjust the order line quantity down to the warehouse available quantity. The remaining quantity can be processed in a new order, or canceled on the host system.
2) Zero Ship Line
By zero shipping the order line, not one unit for this order line will be shipped. The order line immediately becomes shipped. The rest of the order will also be processed. If this is the only line for the order, then the order will be marked and processed as shipped.
3) Skip Order
The order must be filled to completion, when any portion of the order is unable to be filled, the system removes any allocations and skips the order.
4) Hold Order for Partial Fill
When the quantities don't match, accept any available quantity. If not one line in an order can be at least partially allocated then skip the order.
NOTE:
When dropping from the Exceptions screen or when dropping using the 'Drop without Appserver' option from the Order Drop Manager screen, the user will always be prompted for the best solution.

Parameter ID:0025

Name
Pick Ticket/Label Program

Parameter Type
Order Management

Level
Warehouse

Value
Specify the appropriate program name.

Description
Pick Ticket/Label Program
Enter the program name for either printing the summary pick ticket or the pick label when dropping orders.
If this program is for label printing add "-label" after the program name.

Example:
gen_pick.p (Report)
gen_pick.p-label (Label)

Parameter ID:0026

Name
Pick Ticket Size

Parameter Type
Order Management

Level
Global

Value
- Disable [default]
- Enable

Description
Pick Quantity Size
Generate a pick ticket for each unit of each item?
If this option is enabled, the system will print a pick ticket(request) for each item unit on the order. Enabling this option also facilitates printing a separate label for each item if so desired.
If this option is disabled, then each pick request can contain multiple units to be picked, up to the maximum pallet quantity for each item.
Examples:
Suppose that we want to pick 10 units of item ABC from pallets that hold a maximum of 3 units of ABC.
If this option is enabled, then 10 pick requests will be generated. One for each unit of ABC.
If this option is disabled, then 4 pick requests will be generated. One for each set of 3 units on the pallets, and 1 single-unit pick, for a total of 10 units:
((3 x 3) + 1).

Parameter ID:2000

Name
Wave Size

Parameter Type
Order Management

Level
Warehouse

Value
Specify a numeric value between 1 and 999. [default=5]

Description
Wave Size
The maximum limit on the number of orders in a wave.

For assisting warehouse labor planning, the system allows a limit to be placed on a wave size. The value entered in this system parameter, controls the maximum order count for all waves dropped. The value represents the upper limit. So, if the system is assigned to fifty orders in a wave, there will never be fifty-one orders combined in one wave. Although, there may be anywhere from one to exactly fifty orders in a wave.
Orders are assigned into wave numbers by sequential order. Assuming you are dropping eighty orders, the first fifty will be in the first wave. The remaining orders will be in the second wave.
For no upper limit on the wave size, set the size to zero.
Please note that this limit is not applicable for host assigned waves.
Example:
The system is dropping 155 orders. The wave size is set at 50 orders.
The result of dropping these orders is four waves. The first three waves would each contain fifty orders each. The final five orders are placed in the final wave.

Parameter ID:2019

Name
Adjustment Orders, In

Parameter Type
Order Management

Level
Global

Value
Specify an appropriate code, such as STKIN. [default=STKIN]

Description
The adjustment code used for Adjustment type orders when the inventory level is negative. In effect, what stock adjustment do we use when adjusting up inventory levels?

Parameter ID:2020

Name
Adjustment Orders, Out

Parameter Type
Order Management

Level
Global

Value
Specify an appropriate code, such as STKOUT. [default=STKOUT]

Description
The adjustment code used for Adjustment type orders when the inventory level is positive. In effect, what stock adjustment do we use when adjusting down inventory levels?

Parameter ID:2021

Name
Customs Adjustment Code

Parameter Type
Order Management

Level
Global

Value
Specify an appropriate code, such as CSOUT. [default=CSOUT]

Description
What stock adjustment code do you want applied to the adjustment? The stock adjustment is applied through the Inventory Control, Customs Hold screen.

Parameter ID:2025

Name
Pick Ticket/Label Print

Parameter Type
Order Management

Level
Global

Value
- No
- Yes [default]

Description
Do you want to print a summary pick ticket or labels when dropping orders?
The program used to print is defined by parameter 0025.

Parameter ID:2027

Name
Full Cartons

Parameter Type
Order Management

Level
Warehouse

Value
- Single Location Case Pick
- One Carton per Pick
- Multiple Cartons per Pick [default]

- Single Loc. Split/Case Pick

Description
Break By Carton
When creating picks for an order, should the system break picks by full carton? This system parameter is used to determine how to pick from the Full Case Primary location, the Split Case Primary Location, and bulk. This parameter is not used when picking full pallets, or from the back order location. It would also have no effect if there is no primary case location.
Example:
Pick of 118 units, where there is a split primary and a case primary with a case size of 50.
Single Location Case Pick
1 case pick of 118
One Carton per Pick
2 case picks of 50, 1 split pick of 18
Multiple Cartons per Pick
1 case pick of 100, 1 split pick of 18
Single Location Split/Case Pick
1 split pick of 118 (If pick of 100 it would be 1 case pick of 100 because that consists of complete cases.)

Parameter ID:2028

Name
Labor Items

Parameter Type
Order Management

Level
Warehouse

Value
- No: Lines containing labor items are skipped.
- Yes: Picks are created for labor items when the Order Drop Manager is processing a labor item. [default]

Description
Labor Items
Do you create a pick for labor items? If a pick is created for a labor item, the pick is in the Labor location?
Use this system parameter to create the picks, when the Order Drop Manager is processing a labor item, or to skip the order line.

Parameter ID:2031

Name
Auto Drop Run Log

Parameter Type
Order Management

Level
Global

Value
Specify the full directory path. [default=0]

Description
Enter the full directory path where Auto Drop Rules Run Logs will be located.

Parameter ID:2053

Name
BOD Kit With Required Component

Parameter Type
Order Management

Level
Warehouse

Value
- Skip Order
- Zero Ship Kit [default]

Description
BOD kit handling with required components.
How should BOD kits be handled during the order drop process when inventory is not available for a required component?
If "Zero Ship Kit" then the BOD line will be zero shipped on the order if any required components are not available for allocation.
If "Skip Order" then the entire order will be skipped for review.

Parameter ID:2054

Name
Prebuilt Kit Without Inventory

Parameter Type
Order Management

Level
Global

Value
- Zero Ship Kit [default]
- Skip Order

Description
Prebuilt kit handling without inventory.
How should Prebuilt kits be handled during the order drop process when inventory is not available for a component?

If "Zero Ship Kit" then the BOD line will be zero shipped on the order if any components are not available for allocation.
If "Skip Order" then the entire order will be skipped for review.

Parameter ID:2111

Name
Partial Primary UOM Pick

Parameter Type
Order Management

Level
Global

Value
- No [default]
- Yes

Description
Pick partial UOM from Primaries?
During Order Dropping, can the system pick partial units of measure from a Primary Location?
Example:
Split Case Primary is empty, and Case Primary has available stock.
Can we pick less than a case (an each) from the Case Primary?

Parameter ID: 7510

Name
Order Drop By Lot Size

Parameter Type
Order Manager

Level
Warehouse

Value
- Yes: Allow

Description
Efficient Lot Size Order Dropping
This parameter will supercede the standard default order dropping criteria by allocating inventory based on quantities closest, but not smaller than the order quantity.
Note: Multiple Allocations May Occur

Glossary

ABC Product Classification
An accounting method used to identify items by value or other criteria. These classifications can be used to direct the cycle counting process where A items are counted more often than B items, and B items are counted more than C items. The ABC codes for TWL are handled completely in TWL.

adjustment code
A return/adjust reason code that explains why a credit memo or Return Merchandise (RM) order was created for returned items. This code is set up in **SA Table Code Value Setup** and defines the disposition and parameters to handle the returned items.

advanced shipping notice (ASN)
A standard electronic data interchange (EDI) transaction set that is communicated from a supplier to their customer. The ASN describes the items and quantities in a pending shipment and the expected time of its delivery to the customer site.

alternate location
A movable location that temporarily stores items that are being moved to another fixed location. This location enables TWL to monitor the item at all times and is required to perform consolidation and replenishment tasks.

ASNPO
Purchase order (PO) lines that are tied to an advance shipping notice (ASN) and represent a group of receipts.

backorder flag
A line-item field that determines whether a backorder is created for the difference between the quantity shipped and the quantity ordered.

bar code symbologies
Bar code symbols, which consist of parallel dark bars and light spaces, are read and deciphered by machines. The dark bars absorb light, and the light spaces reflect light. When the bar code is illuminated and a photo sensor views the reflective differences between the bars and spaces, the code generates a proportional electronic signal that is decoded by the system. The data can translate to part numbers, purchase orders, or anything that can be expressed numerically or alphabetically.

batch
A function that executes a set of commands or jobs and provides results without human intervention.

batch picking
Process by which goods are selected in quantities by picking-operators so as to satisfy the demand for more than one order. Goods are first picked by SKU and later sorted by order number or delivery destination.

bay
A section of a storage system.

bill of lading
Document used to acknowledge receipt of goods that can also serve as a contract for transportation.

blind count
The expected count quantities are not displayed for the counter to view. The individual doing the count must specify the quantity counted without knowing what the system is expecting.

build-on-demand kit
An item that does not exist in inventory until a customer requests the item and its production is set in motion. The components of the kit are specified at the time the order is entered into the system and are assembled when the components are picked from inventory. Pick tickets for build-on-demand kits include the components required and the quantity required for each component.

bulk storage
This reserve location contains items in their original shipping container, usually full cases or pallets. This location cannot contain split cases or other fragmented units of measure.

carousel
Carousels can be thought of as storage shelves on wheels. The shelves come to the operator, where all of the tasks can be completed.

carton
A container that is constructed specifically for packing and shipping purposes.

case
A container that holds a fixed, pre-determined quantity of an item. Items can be received, stored, and shipped by the case.

committed quantity
When a pick ticket or warehouse transfer is printed in Distribution SX.e, inventory, needed to fill the order or transfer, is moved into a committed stage. The inventory is not allocated by Distribution SX.e to any other orders or transfers.

component
An item that is combined with additional items to comprise a kit.

consolidation
Removing merchandise from one location and combining that merchandise with the same item in another location.

counter bin location
The primary pick counter location specified in the **TWL Configuration-Item** master record, and the **Product Warehouse Product Setup** record.

counter sale (CS)
Counter sale is a stock order taken in a counter sale environment, where you have direct contact with your customers. The order is in Stage 3 (Shipped) when the order is entered, and stock is committed at that time.

cross docking
The process of moving inbound material directly from the receiving dock to the shipping dock, essentially filling orders from new receipts.

customer order
One or more items ordered by a single customer that are shipped in one or more cartons or pallets in a single shipment. Orders consist of line items referencing single SKUs.

cycle count
Counting inventory by checking a particular location or set of locations and comparing the physical counts with the system-maintained inventory levels.

decrement
To reduce by a predetermined amount.

default counter staging location
A designated area that is used for items that are transferred from the main warehouse to the counter sales area. The location COUNTER is generated by the system. This location is the default value on the RF when a counter sale stock move is performed.

default labels
A set of Unibar ELS labels that are configured for the Zebra printer. You can copy these labels at the company-warehouse level to create labels for other printers.

default receiving zone
A location used during stock putaway, if the Item master record does not have an assigned zone or no primary location has been defined for the item.

department
A department is a functional group of employees that perform similar tasks. Within a warehouse, you might have a receiving department, a picking department, and a shipping department. At least one department must be set up, as is required on the Employee master record.

directed put away
Putaway locations are assigned based on internal logic that determines which storage location the goods are to be sent.

discrepancy
When the actual results of a cycle count do not coincide with the expected quantity, a discrepancy exists. The discrepancy must be researched and resolved to ensure quality information for warehousing activities.

dock door
Door to which a receiving or shipping container is assigned. Used for direction and association of merchandise to shipment.

drill down
Changing a query to access or view a greater level of detail.

dropping orders to the floor
Releasing orders from **TWL Outbound-Order Management-Order Drop Manager** to be picked, packed, and shipped.

edit errors
Errors found during the audit performed by the **WL Audit Inventory Report** when the report is generated in update mode. The corresponding Distribution SX.e balance is not updated for these errors. These errors are due to timing differences between the two systems, and after processing has been completed, the error is corrected. Therefore, there is no requirement for an adjustment to be made.

emergency orders
These are orders that must be filled immediately to satisfy customers requests. Referred to also as rush orders, orders that contain rush line items qualify as emergency orders. Emergency orders are prioritized and are displayed on the order selection screen with an E.

end of day
A routine that maintains the age of data stored in the TWL files, calculates inventory class by velocity, schedules cycle counts, cleans up system log files, and creates the item history files.

expected quantity
The quantity you expect to find on the shelf when you are counting inventory.

first in first out (FIFO)
An inventory rotation method that means the first items received are the first items pulled from the shelf to fill orders.

flow rack
Shelves designed to hold several cartons of product. Each shelf or lane of the rack is at an angle to accommodate gravity flow to enable picking from the front and loading from the back. Flow racks are used in high pick areas because the shelf facing the picker offers a large quantity of product. The racks can be replenished from the opposite side, thus allowing two tasks to occur simultaneously.

four-wall warehouse
Describes the entire area in which inventory is stored.

hand-held scanner
The hand-held scanner provides a means of fast and accurate data entry, and enables warehouse employees to collect data from anywhere in the building. The scanner is a hand-held device that emits a light beam over a bar-coded label. The light that is reflected back to the scanner from the white spaces, which exists between the black bars, is a signal that is converted to a computer-acceptable message. See radio frequency.

hazardous materials
Items that are potentially dangerous. Specifications for hazardous merchandise can restrict where that merchandise can be stored and how merchandise can be shipped.

housekeeping
Term encompassing the routine duties needed to maintain warehouse cleanliness and organization to facilitate primary tasks. In addition to the physical tasks associated with maintaining an orderly warehouse, this term includes the quality attitude of your employees regarding their jobs, work environment, and commitment to customer satisfaction. Housekeeping also includes safeguarding the warehouse and inventory investments.

inactive data communications
These communications are successfully communicated files that remain on the system as long as the system administrator determines they should be kept. The inactive records are removed from the system through the **WL Delete Transmissions Report** function.

initial load
The first physical count of a TWL warehouse that establishes the items and quantities contained in each bin location.

initial physical inventory
When you implement warehouse logistics (WL), information must be established before you begin processing. The warehouse and item records must be released to TWL and various tables must be set up. After the bin locations are established, a physical count is performed to ensure quantity accuracy.

in pick
This TWL stage indicates the order is in the process of being picked.

interface
The transparent flow of data between TWL and Distribution SX.e. This flow of data is automatic and processes are generated to ensure data integrity.

LBL file
Default label files for legacy labels. You can copy these files.

LDD file
A dictionary file template used for setting up your data structure for labels.

legacy labels
Standard TWL labels that do not require additional software or modifications. You can print these labels on Zebra printers or printers that emulate Zebra printers.

less than load (LTL)
Generic reference that describes shipments made by a carrier other than package carriers such as UPS, RPS, or FedEx. This carrier is usually a freight carrier that rates a shipment based on ICC tariff, taking into account commodity code, class, total weight or any shipment method.

loaded stage
A temporary or intermediate stage in TWL that is between the picked and shipped stages. This stage enables you to delay shipping, make last-minute changes to an order, or return inventory to stock if the customer cancels the order.

location
The storage or bin address of an item. An item can be found in more than one location within a warehouse.

logistics
The planning, implementation, and control mechanisms that promote efficient storage of goods, services, and related information from the point of origin to the point of consumption in order to meet customers' requirements.

master type record
A record that is associated with a master file communication release between Distribution SX.e and TWL. These records create data in TWL and maintain consistency between Distribution SX.e and TWL. If pertinent data changes, such as a record creation or deletion, then the corresponding TWL record is changed too.

min/max
These are lower and upper quantity parameters that are considered when a primary pick location is replenished. Quantities should be based on outbound activity of the item, in order to forecast the demand for the item. The quantities should also be based on how much is available for the picking demand, rather than randomly assigning a location.

net available to be sold
The amount of product that is available for sale. This quantity is calculated by subtracting the reserved and committed quantities from the on-hand quantity.

on hand quantity
The aggregate quantity of a stocked item before quantities are committed or reserved to fill orders.

open, assigned
This TWL stage indicates the order has been dropped to the floor.

open, unassigned
This TWL stage indicates the order has been released to TWL, but the order has not been dropped.

order picking
The process of removing items from storage to meet a specific demand. Order picking is the basic service a warehouse provides for its customers, and picking is the function around which most warehouse designs are based.

overflow location
A location containing excess stock that is used to replenish the primary pick locations.

packed
This TWL stage indicates the order has gone through the packing function.

packing
Process of putting picked goods into shippable cartons.

pallet
Wooden, plastic, or metal platform used for movement and storage of packaged goods.

pallet footprint
The number of pallets that fit into a two-dimensional location, usually on a warehouse floor or racking system.

pallet LIFO
A method of putting receipts away in which the last item placed on a put-away pallet is the first item to be put away. This put-away option is controlled by parameter 5757, Putaway Sort Order RF Prompt.

pallet primary location
A location designated on the Location master record as the primary picking location for an item. If selected during order dropping, pickers are directed to this location rather than the split case primary location. This location type only interfaces with order dropping and picking. This location type is not supported by other TWL functions, such as putaway or replenishment.

parameters
Parameters that affect the entire TWL system. You cannot set these parameters per warehouse or company.

physical inventory
The total of all inventory in all locations stored in the warehouse or the annual counting of all items in the warehouse.

picked
This TWL stage indicates all lines on the order have been picked and the order is ready to be packed.

pick velocity
The number of times a location is visited to fill customer orders. This is related to item classifications. Can also be referred to as pick hits.

pick wave
The release of a batch of orders assigned to pickers to be simultaneously picked. Batch picking requires a high degree of discipline and control picker activity. This methodology has the potential of improving the efficiency of retrieving items from storage to fill orders. Scheduled wave picking that is synchronized with order sorting and truck loading maximizes labor, equipment, and dock usage.

prebuilt kit
A kit that is assembled and stocked in your warehouse as a single item.

pre-live
A phrase used to describe the period of time prior to your TWL conversion.

primary pick locations
A forward location uniquely configured to store items that are frequently picked. Primary pick locations are replenished according to minimum and maximum quantities and replenishment units, such as item, case, pallet, specified on the Item master record. Primary pick locations can also be referred to as quick-pick areas.

process type
The communication type that identifies the master file (BIN, CYC, MST) or transaction file (PRE, RCV, PCK, PAK, SHP, STK) information being communicated between Distribution SX.e and TWL.

productivity
The amount of output per hour of work.

productivity gains
The conservation of labor, time, and equipment that is a result of the elimination of work content.

putaway
The process by which items are moved from either the receiving dock or a staging area to a bin location within the warehouse.

putaway group
A user-defined name that you can use to combine groups of similar items that are in the warehouse based on the way you set up the putaway group. Examples of similar items include drills, saw blades, and other categories. The putaway group enables TWL to find an empty putaway location after primary locations or locations with existing inventory were ruled out.

putaway sequence
Determines the order that a zone is selected for putting receipts away when **`Disable`** or **`Zone Sequence`** is chosen for parameter 5757, Putaway Sort Order RF Prompt.

quick pick area
An area of the warehouse that is usually compressed into highly utilized space to improve the efficiency of retrieving items from locations to fill customer orders. This area can also be referred to as a forward-pick area.

radio frequency (RF)
Technology that transmits data collected by scanning devices over radio frequencies. The obvious advantage for this technology is the real-time updates of data wherever data is collected without the use of wires. RF contributes to improving the quality of information for inventory and stock location accuracy, labor management, and responsiveness.

real time updates
The instantaneous update to the system for any activity that occurs in a warehouse that is captured by a radio frequency unit. The TWL Web system is updated as soon as a change is made from an RF unit. Distribution SX.e is updated after the appropriate batch process has been generated.

receipt transaction (RT)
A receipt record created in TWL. The RT contains the information related to a single purchase order. An RT number is the combination of the purchase order number and a two-digit suffix number from Distribution SX.e.

receiving
The collection of activities involved in the receipt of merchandise coming into the warehouse. Receiving includes scheduling the delivery vehicle and assigning a dock, unloading the merchandise, identifying the item, checking the quantity and quality are as ordered and on schedule. Receiving includes putting the merchandise away, and updating the system with the information.

release (download)
A data communication that originates in Distribution SX.e and passes through to TWL.

repack
Packing an item in another carton for shipment.

replenishment
Moving inventory from a bulk storage location to a picking location.

replenishment quantity
A dynamic quantity that the system calculates to replenish primary pick locations. The location is replenished by item, case, or pallet, based on the **Primary Pick Setup** screen.

reserved quantity
When an order is initially entered in Distribution SX.e the inventory needed to fill the order is reserved. The inventory is reserved so that the inventory cannot be sold to another customer or used for any other purpose.

serpentine pick
The path a picker takes through defined pick locations enables the picker to retrieve items in one trip through the zone, aisle, or location assigned to the picker.

shelf
Storage equipment that is intended for holding small items in small quantities.

shift
A shift is a block of time, usually in 8-hour increments, that an employee is scheduled to work.

shipped
This TWL stage indicates ship verification has occurred on the order and the order is on its way to its destination.

shipping container
A pallet or carton that can be used for transporting merchandise.

Shipping Container Marking (SCM) Label
A label that usually contains readable text and scannable bar code that uniquely identifies the origin and destination, contents of the container, and other vital shipping information.

shipping request
A document that is used as an audit trail for a shipment that does not affect inventory quantities or value and is not associated with an order.

ship via
A code set up in **SA Table Code Value Setup** to represent a method of shipping orders, transfers, and shipping requests.

slotting
Slotting is a method of organizing your warehouse. For each item in the warehouse, you should consider the appropriate storage mode, the appropriate allocation of space in the mode, and the exact location within the mode. Slotting is based on the measurement of the number of times an item is requested. This indicator is critical because the indicator is a measure of the number of potential times an operator visits the location for a particular item. Most of the work in a warehouse is traveling to, from, and between warehouse locations. Therefore, knowledge of the potential location visits for individual and families of items is critical to success in managing the overall work content in the warehouse.

spike
An unusually high demand of an item, which would trigger an unplanned replenishment because the demand would exceed the quantity needed to pick and could cause a stock out.

stack height
The number of fully loaded pallets that can be stacked on top of each other within a three-dimensional location, usually on a warehouse floor or racking system.

stacking height
The **Stacking Height** field value on the Item master and Location master records controls the maximum number of pallets or layers that can be safely stacked. Stacking height is important for items that are heavy or are packaged such that unlimited stacking would compromise the quality of the item. Items and locations must have valid dimensional data so TWL can compute the maximum quantity based on what can be safely stacked.

stage-in location
An intermediate location used for staging prebuilt kit components that were gathered from the warehouse. Prebuilt kit components are moved to this temporary location until they are received into the work center.

stage out area
A designated location in which assembled kits are stored until they are transferred into inventory.

stage-out location
An intermediate location used for staging finished prebuilt kits that were assembled in the work center. Completed prebuilt kits are placed in this temporary location before they are moved into the warehouse for storage.

staging location
A location in your warehouse that can contain several different items and store them for pending shipment, to fill backorders, or any temporary storage reason.

stock keeping unit (SKU)
A unique numbering system that makes a product or item distinguishable from all others.

storage capacity
The maximum number of units that can be stored in a location safely based on the height, length, width, and weight limit of the location.

synchronize (upload)
A data communication that originates in TWL and passes through to Distribution SX.e.

system parameters
Options that must be chosen to ensure the system is performing according to your operational standards. These options are similar to the administrator options in Distribution SX.e.

top off
A function used to assign replenishment for locations that are below the maximum quantity assigned on the **Primary Pick Setup** screen. The quantity is not low enough for the system to generate a replenishment because the quantity is above minimum.

truck pallet
A pallet that is used for picking and ship verification. When the truck pallet is ship verified, the packing step is skipped and the truck pallet is shipped directly from the dock. The pallet ID is printed on the packing slip according to the Packing List options on the **TWL Outbound-Shipping-Carrier Master-Additional** record for orders, transfers, and external VA work orders.

unavailable inventory
Inventory that cannot be sold to customers because the inventory is defective or obsolete.

unavailable reason codes
Codes assigned to items to identify the reason they are not available for sale. TWL requires specific Reason Unavailable codes, such as damaged, being inspected, or other reasons the item cannot be included in the on hand quantity.

unit of measure
Packaging quantity of an item (SKU) indicated for storage or shipping purposes. Units of measure are hierarchical in nature, such as individual units in a box, boxes in a case, and cases in a pallet. The default selling unit of measure (UOM) for individual units is Each.

unplanned replenishment
A user-generated replenishment in which the item and location is the source of the replenishment quantity.

urgent replenishment
The replenishment priority is only set during the creation of the replenishment and not on the RF gun during processing. This priority value (urgent) is only assigned as true when the bin location being replenished is a primary and the value is at or below zero on-hand, considering all pending picks and work order allocations for that product in that bin location.

velocity
A measure of how rapidly an item moves through a warehouse. Items that move rapidly have high velocities. Items that move less rapidly have lower velocities. Generally, high-velocity items should be stored in locations that are the most accessible, leading to a concentration of fast moving items. This results in more efficient picking operations.

visibility
When merchandise is received and the data is synchronized to Distribution SX.e, the data is visible on the system. The data is considered inventory available for sale, as long as there are not any holds on the inventory.

warehouse management system (WMS)
A management information system that controls warehouse activity, furnishing instructions to warehouse resources to manage operations. WMS systems typically interface with a host system (Distribution SX.e), process control system (TWL), and RF devices that collect and disseminate information.

wave type
Three different types of cycle count waves can exist in TWL. The wave types can be generated by the system, through the end-of-day processing, or created manually.

work in process

This status type is reserved for transactions that are in the process of communication or were interrupted during the communication process.

work-in-process inventory

In TWL, when a component or kit is moved into the Kit Build Department, the inventory is flagged as work-in-process and goes into unavailable stock. In Distribution SX.e, the stock is reserved or committed to a work order.

work order

Document used to build, or replenish, prebuilt kits. Work orders can be manually created in **KP Work Order Center Entry** or **Sales Order Entry**, but are usually created as part of the **KP Entry Recommended Work Orders Report** process.

yard control

Scheduling inbound and outbound delivery vehicles to maintain an orderly flow of traffic in and out of docks.

zero-picked orders

Orders that could not be filled because every line on the order contains a picked quantity of zero.

zone

A zone contains several locations and is a segment of your warehouse that is usually designed to fulfill a specific utility or purpose. For example, within your warehouse, you can have a secured zone, a cold storage zone, a quick pick zone, bulk storage zone, related items zone, or any other specialized partition.

zone picking

Assigning areas, or zones, to allow a picker to specialize in handling equipment, locations, and items.