Infor Distribution SX.e Total Warehouse Logistics User Guide for Picking, Packing, Shipping, and Kitting

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Contents

About this guide

This guide is designed to help you use the Total Warehouse Logistics module for picking, packing, shipping, and kitting 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*

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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

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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 118 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 80.

Chapter 2: Picking and packing

In the system, you create your sales orders, warehouse transfers, and customer returns according to your business requirements. When orders and returns are printed, the transactions are released to TWL.

During implementation, your TWL administrator set TWL parameters that you can use to control the accuracy and consistency of the information. Those settings enforce picking and packing policies on the warehouse floor and define the system according to your specific requirements. The settings also consistently apply the policies from one operator to the next.

After the order is printed and released to TWL, it is routed to the **Order Drop Manager**. In the **Order Drop Manager**, the order is sorted and dropped for picking and packing or it is sent to the work center. Orders that have been dropped to the floor for picking are displayed on the Radio Frequency (RF) units.

After the order is in the RF environment, operators scan the pick location and scan each product removed from the location. Operators can then scan the container where the product is placed. After operators pick the line items to fill an order, the products are gathered, packed, and shipped to a customer.

The carrier on an order is checked by TWL to determine if the carrier is managed by the system or a shipping interface. The appropriate synchronization process is triggered either at packing or shipping. This depends on whether the system or a shipping interface is responsible for processing the shipment.

Order types and codes

In TWL, codes are assigned to released orders according to specific order dispositions or order types. These codes help pickers distinguish the type of order and processing that is required. This table shows those order types and codes:

Order	Code abbreviation
Assembly	A
Backorder	X
Counter Sale	C
Emergency	E

Order	Code abbreviation
Just in Time	J
Production	K
Pallet Pick	P
Regular	R
Return to Vendor	V
Ship Complete	S
Tag & Hold	H
Transfer	T
Transfer Direct	D
Value Add	F
Will Call	W

Assembly

An assembly is a prebuilt kit that is assembled before the sale, and resides in your warehouse as a single stocked item. Assemblies are entered as a stock item in **Sales Order Entry**, but you create, update, and replenish kits in the **Kit Production** module.

Note: If you use Infor Service Management to process assembly SROs, the products that are identified as SRO Assembly products on sales orders in Distribution SX.e are not prebuilt kits. Sales orders that are identified as assembly orders at the header level in **Sales Order Inquiry** are not assigned the code for assembly type orders (A).

See Tag & Hold on page 17.

Backorder

When you print a pick ticket for a backorder in **Sales Entry Pick Tickets Report**, the order is released to TWL. It is flagged on the **Order Drop Manager** with an order type of X. Backorder is similar to Cross Docking.

When routing pallets to a cross dock zone, parameter 2032, Pick from CrossDock Pallets, enables pickers to be routed to pallets destined for or in the cross-dock zone.

When you drop the order to the floor, the cross dock zone is validated in TWL to determine if the back-ordered product exists. If it does exist, the picker is routed to the cross dock zone. This routing minimizes traffic in the receiving dock area and provides directed picking. If the product is not in the cross dock zone, this hierarchy is used to direct the picking task:

- The picker is sent to the dock, if the **`Pick From Dock`** option in **TWL Configuration-Warehouse-Warehouse Parameters** is selected.
- The picker is sent to the primary bin location.
- The picker is sent to the non-primary bin locations.

The newly received stock may not be in a dock location or in a backorder staging area. If not, then the backorder is changed to a regular order during the release. In this scenario, the picking task is directed to the primary location for the product. In addition, if products are put away after an order is dropped, the pick locations are updated so pickers are directed to the correct location. If the **Pick From Dock** option in Warehouse Parameters is not selected, standard receipts are available for picking when you put them away.

Counter Sale

Counter sale orders are sold from your counter area. Exceptions can be made on a line by line basis to have the inventory picked from the rest of the warehouse.

Emergency

Any orders with line items marked as Rush are prioritized in TWL as Emergency orders, regardless of the order disposition. The orders are flagged in the **Order Drop Manager** and RF to alert you. These orders flow to the top of the pick priority so that they can be picked immediately.

System parameters can be set to notify pickers that emergency orders exist. Parameter 7003, Rush Order Notify, and parameter 7012, Alt Whse Order Notify, contain the number of seconds before a message to the RF is displayed.

If you are a RF operator employee and are assigned to a warehouse zone that has emergency orders, a message is displayed on the RF: `There are rush orders in your zone! Do you want to view them?` Select **Yes** to view the rush orders in your assigned zone.

To avoid interrupting pickers that are picking multiple-line orders, this message is displayed only once between the lines of the same order. This is regardless of the number of rush orders waiting to be picked.

Just in Time

The Just In Time (JIT) order disposition is released from the system to TWL when the order is dropped. JIT orders show on the TWL RF as a ‘J’ order type. You can also filter orders by this order type.

The JIT disposition causes **Sales Order Entry** to provide the RF with the line item’s requested ship and promised dates. The requested ship date is the date the customer wants delivery. The promised date is the date you are committing to. Each line on a JIT order can have a different requested ship date and promised date.

Production

Production orders are work orders that are created with a kit production process.

Pallet pick

If you are picking by order or order type, then the code abbreviation is displayed in the RF **Inquiry Screen**. When an order is dropped, the **Order Drop Manager** may request large orders to be picked from a pallet location. If an order must be picked from a pallet location, rather than a split-case location,

a 'P' is displayed beside the order on the RF. This directs you to the pallet location area. If you are picking by any other method, then the code is displayed on the RF **Order Picking** screen.

Regular

Regular orders make up of the bulk of your sales orders. This type of order can include build-on-demand kit products. These products do not exist in your inventory as ready-to-sell stock, even though the components might exist in your inventory. A customer must first specify the components, and then you assemble the kit when you pick the order. Build-on-demand kits are not transferred to the work center to be assembled.

You cannot pick components to assemble a partial unit of a build-on-demand kit. This is because you can only ship equal percentages of the components in the system. To ensure this requirement is met, you can only close a pick request when the pick percentages of build-on-demand kit components match.

The **Download Zero Quantity Lines For Order Manager To Drop** option, in **SA Administration-Administrator Options-Logistics-WL Options**, affects the line items that are released to TWL. The option settings have these results:

- If the option is cleared [No], then zero quantity shipped lines are not sent to TWL.
- If the option is selected [Yes], then all lines are released to TWL from **Sales Order Entry**, **Warehouse Transfer**, and **Kit Production**. The lines are only released if the **`Print Pick Ticket Line Items When Quantity Shipped is 0`** option is selected in **SA Administration-Administrator Options-Documents-Sales Orders-Printing**.

If all lines on an order contain a zero quantity shipped, the order is not printed by the system. The order is not released to TWL.

Return to Vendor

Vendor returns on Purchase Order (PO) Return Merchandise (RM) orders are routed to the **Order Drop Manager** when the order is printed. Gather the goods to be returned to the vendor from the unavailable stock locations. Then pack, and ship them in the same manner as a customer order. The unavailable balance is allocated when the order is dropped. If a sufficient unavailable quantity is found, then the purchase order is dropped to the floor and is displayed on the RF screen.

Ship Complete

Orders with a ship complete disposition tell the warehouse to hold all products on an order until the entire order can be shipped. An order with a ship complete disposition indicates that the customer wants the order held until you have filled all line items. These orders show on the TWL RF as an ‘S’ order type.

Available inventory is reserved based on the quantity ordered. Such orders are usually gathered and staged in a designated area. This protects the available products until the remaining products can be obtained and the entire order can be shipped. If the merchandise is not staged in a designated place, then the goods may be gone when the order is finally ready for shipment. If you use a shipping interface, you cannot ship an order with a ship complete disposition until the order is completely filled.

Tag & Hold

Tag & Hold orders can be released from **Sales Order Entry** to TWL to be picked, packed, and staged before all lines are complete. You can use Tag & Hold orders to complete lines when inventory is available without creating backorders for the unfilled lines. Additional picks are created for the remaining lines as inventory is allocated in TWL.

A Tag & Hold order disposition indicates one of these conditions:

- You are to tag the products on the order with customer-specific details and hold them until the customer notifies you to deliver the goods ordered
- The customer makes other special arrangements for obtaining the products
- The sales order is an assembly order with a corresponding assembly SRO in Service Management. Processing of the assembly SRO in Service Management is not complete.
  Note: Sales orders are identified as assembly orders at the header level in **Sales Order Inquiry**.
  See the *Infor Distribution SX.e Integration Guide for Infor Service Management.*

TWL RF operators are notified that an order is Tag & Hold, but can only view those lines that can be picked. After the current lines are picked, operators see the remaining unpicked quantities on the order. The items on the picked lines should be packed into a container. The container can be staged and held in a specified area of the warehouse. When remaining lines become available, it can be retrieved.

After picking, the stage advances to packed, but you cannot ship the order. These orders show on the TWL RF as an ‘H’ order type. The order status is Hold for Tag & Hold, although you can print a packing list. After all lines are picked, the Tag & Hold order is considered complete in TWL.

The Tag & Hold disposition must be removed from the order in **Sales Order Entry**, and the pick ticket reprinted to update TWL.

For assembly orders, the disposition is removed after the corresponding assembly SRO in Service Management is closed and the assembly order is updated by the ServiceOrder BOD.

After **Sales Entry Pick Tickets Report** updates TWL, the order status is cleared and the order can be shipped in **WL Entry Batch Shipping Report**. If inventory is not found, and picks are processed as short or zero picks, then those orders are not released to TWL again. You must take one of these actions:

- Correct the orders manually in **Sales Order Entry**
- Allow the order to backorder after the Tag & Hold disposition is removed, as with a standard sales order

Transfer

A Transfer is shipped from a TWL warehouse to a regular warehouse, or to another TWL warehouse. After the transfer is entered and printed in the system, it is released to TWL and dropped to the floor for picking. The order number consists of the transfer number and is prefixed with “T” and leading zeros. These orders show on the TWL RF as an ‘T’ order type. The order class is 'WT'. When the transfer is dropped to the floor, the order is displayed on the RF screen.

You can pick, pack, and ship the transfer in the same manner as customer orders. If the transfer is to be shipped directly to the receiving warehouse customer as a Direct Order (DO), then the workflow is

the same. If another TWL warehouse is receiving merchandise from a regular warehouse using a warehouse transfer, then the processing is handled in the TWL Receiving process.

Transfer Direct

Direct transfer orders are shipped directly to the customer from the warehouse. This action bypasses the transfer to the other warehouse, which would normally pick and ship the order again.

Value Add

Value Add orders are released to TWL if the Value Add order meets one of these two criteria:

- The Value Add order contains one or more **Inventory (IN)** sections with a single final **External (EX)** section
- The Value Add order contains one or more **Inventory (IN)** sections with a single final **Internal (IT)** section

The processing that occurs in TWL is based on the type of final section specified. An **Inventory (IN)** on an **External (EX)** section of a VA work order is printed in **VA Entry Processing Pick Tickets Report**. The **Inventory (IN)** is then released to TWL for picking and shipping to the external service vendor for fabrication.

An **Inventory (IN)** on an **Internal (IT)** section of a VA work order is released to TWL when the order is printed in **VA Entry Internal VA Print**. The order is dropped from **Order Drop Manager** and routed to the kit build department for fabrication. The **Internal (IT)** section is processed like a prebuilt kit.

Will Call

Orders with a will call disposition are picked and stored until the customer picks up the order. When the order is picked, the order type 'W' is displayed on the RF screen. Order pickers should stage the products in a designated will call area and notify the customer service representative that the order has been picked. The customer service representative notifies the customer the order is ready for pick up.

Picking units

Seldom do warehouses receive goods in the same quantities or packaging required for customer purchase or shipping. So, goods must be reassembled into picking units. Your warehouse might deal with a variety of unit packages, and the manner with which orders are picked are unique for your environment.

System parameter 2027, Break By Carton, controls the manner you are directed to fill pick requests. Pick records are created by TWL for full case primary locations in case-quantity increments. Pick records are created for any remaining quantities in the split-case primary location, if one exists. If not, pick records are created for another non-primary location that enables picking in split-case quantities. The most efficient method that balances travel time and accuracy is chosen for your warehouse during implementation.

For example, you are required to fill a line item for 118 units of a product that has a split-case primary and a full-case primary with a case size of 50. If so, then how parameter 2027 is set determines your actions. This table shows the selected value for 2027 and your action:

If	Then
A single location case pick is selected	You are sent to a case location and must compute the number of full cases you must pick.
One carton per pick is selected	The picks required to satisfy the request are computed by TWL. You are directed to get two case picks and one pick of 18 from the split-case location.
Multiple cartons per pick is selected	You must compute the number of units to pick. You are directed to get one case pick of 100 and one split pick of 18. You determine that you must pick two cases from the full-case location and one pick of 18 from the split-case location.
Single location split/case pick is selected and the requested quantity is not evenly divisible by the full-case quantity	You are directed to the split case location to pick 118 units. This selection requires minimal travel time.

The default selling unit of measure (UOM) for individual units is EACH. That default unit is displayed during picking. However, your vendor may distribute the same product in many different units of measure. If parameter 7000, Multiple UOM During Picking, is set to **`Yes`**, then you can pick multiple units of measure for the same product.

For example, you buy, sell, and stock window-cleaning solution in individual spray bottles, six-pack spray bottles, and gallon units of measure. You store them in the same location. You are picking an order for 12 spray bottles. However, only 7 individual units are in the location. By entering the **SA Table Code Value Setup** or **Product Extended Product Cross Reference Setup** unit of measure code, the equivalent number of units you are required to pick is computed by the system. If necessary, a decimal is included to represent a portion of a unit.

By changing the UOM field to EACH, the quantity you are required to pick is computed by TWL. If you are required to break an inner pack to fill a line item, the inventory is maintained in the lowest common denominator; typically EACH. Use this unit of measure to ensure inventory is updated appropriately.

Parameter 7000, Multiple UOM During Picking, may be set to **`Yes`** to allow picking with multiple units of measure. The validation during RF **Packing-Order/Pack Verification** is based on the selling unit. Parameter 7000 may be set to **`Yes`**, and the **`Whole Order Unit Ship`** option selected for the item in **TWL Configuration-Item-Miscellaneous-Outbound**. If so, the stock quantity picked is rounded to the nearest whole selling unit to be validated in RF **Packing-Order/Pack Verification**.

Picking options

Your warehouse can be set up as a pick-to-tote warehouse, in which you pick products and put products in reusable totes or carts. Or, your warehouse can be set up as a pick-to-pack warehouse, in which you put picked products directly into a carton or shipping container.

Pick to tote

In a pick-to-tote environment, you can pick products for several orders with one pass of a zone. Do this by placing picked products into intermediate totes or bins that are affixed to a movable cart. In addition, you can estimate the size of the carton required for the order by looking at the contents in the tote.

Pick-to-pack

In a pick-to-pack environment, you place the products you pick immediately into a shipping container or on a truck pallet. Because products are picked from the shelf and put directly into a shipping container, the packing process is eliminated. The **`Pick-to-Pack`** option on the **TWL Configuration-Item** master record determines if a product is directly packed. Picking parameter 1060, Carton Validation, controls what you pack in a single carton. Your administrator can set parameter 7011 to notify you when the order is fully packed.

Quick pack

Parameter 1055, Quick Pack, determines if your warehouse uses the Quick pack option, and you pack all the products from a tote into one carton. Parameter 1051, Packing Option, determines the scanning order and packing configuration, and you have these options:

- Carton from Totes: This option is for packing one carton from several totes. Use this option if you use several totes to pick an order. The RF prompts you to scan the carton, then all the totes that are used.
- Tote to Cartons: This option is for packing many cartons from one tote. Use this option for warehouses which pick large orders to one tote, or one order to a tote. The RF prompts you to scan the tote, then the cartons.
- Quick Scan: This option allows the packer to quickly pack many cartons from one tote. This feature should be used primarily when putting a high quantity of goods into one carton. The quantity is assumed to be one.

Pick consolidation rules

Pick requests are consolidated when picks are made by waves, orders, or zones. Pick records are consolidated if they are for the same product, in the same bin location, and have the same unit of measure. This method adheres to the carton validation criteria determined for a pick-to-pack warehouse and the tote validation criteria for a pick-to-tote warehouse.

Parameter 7007, RF Pick Consolidation, controls the Consolidate ON option on the RF **Pick Options** menu. When the parameter is enabled, the option is changed by TWL from Consolidate ON to Consolidate OFF and vice versa.

If the warehouse is set up as pick-to-pack, consolidation adheres to parameter 1060, Carton Validation. This parameter restricts whether you can pack more than one order in a single carton.

Employee assignments

You can use the **Order Drop Manager** to assign employees to pick waves. If your order manager has assigned employees to waves when orders are dropped, then an ‘R’ or ‘E’ is displayed on the RF. These settings have these results:

- E: This setting enables you to access the lines that contain ‘E’ or are blank.
- R: This setting indicates the pick wave is assigned to another employee, and you cannot view the pick wave.

On the **Pick Options** menu, the **All Assignments** field default is **No**. This field determines if waves that are assigned to specific employees show on RF scanners.

When you access the field by pressing the arrow, you can change the field to **Yes**. All picking assignments show on RF scanners, but only the designated employee can access assigned waves.

Sorting workflow

If your employee security allows RF sorting, a screen shows the sorting choices after you select an option from the **Order Picking Pick Options** menu. Selecting a different sort choice determines how waves and orders show on the screens before you get to the pick selections screen. The sort choice you select remains throughout the RF session.

If parameter 7006, Allow RF Sorting of Waves/Order, is set to **Yes**, and you have security to sort pick records on the RF, then you can sort by these sequences:

- Product category sequence
- Warehouse zone sequence
- Warehouse zone [alphabetically]
- Location sequence
- Aisle [alphabetically]
- Bin [alphabetically]

After you select an order for picking, the pick records show on the RF. You can change the sort method by selecting **S** from the inquiry screen. Pick records that are skipped are not automatically closed or picked. When you skip a pick record, handle the request at a later time to complete the task.

Sorting pick records on the RF

1. From the RF **Main Menu**, select **Order Picking**.
2. Select **Pick Options**.
3. Select the method to pick orders. If you are using a truck, specify the pallet ID on the truck for this picking task. Otherwise, press **Enter** through the **Truck Pallet** field.
4. Select the method to sort the pick records by.
5. If you are picking by wave and know the number, specify the wave number to pick and go to step 9. Otherwise, press **Enter**.
6. In the question, select **Yes** to show a list of waves.
7. Scroll through the list and select your assigned wave. To change the sort method, press **S** and select a different sort method.
8. When prompted, specify the zone and aisle that is assigned to you. If you are picking all lines in this wave, press **Enter** as you pick through the wave. You can view every line in the wave.
9. Scroll through the products and press **Enter** on the selected product.
10. In the **Pick From Label** menu, to skip a pick record, press the **down arrow** to go to the next pick record. If you are picking by warehouse zone then you can only skip to picks assigned to that specific zone.
11. Confirm the location from which you are removing the product, the product number, and the quantity picked.
12. Specify a carton ID, if required.
13. Repeat the previous steps until all items in the wave are completed.

Picking waves

All orders, with the exception of emergency orders, are dropped by the **Order Drop Manager** according to predefined criteria in pick batches. This pick batches are commonly referred to as waves.

When you are directed to a pick location, you are prompted to scan the bar-coded storage label where the products are to be picked. Upon verification of the correct storage location, you are prompted to pick the required quantity from the location. If the quantity is correct, a correct pick is confirmed by TWL.

Picking an order by wave

When dropping orders in waves, your manager can sort orders by order type. Then, orders can be sorted by branch, carrier, class, customer and ship to, customer, estimated ship date, order, priority, type, single-line orders, and zone.

In TWL, you can pick by wave. This enables one employee to pick several orders, or more than one employee to pick the same order. The employees must be working in different zones, unless your

warehouse zones are overlaid. Overlaid means that aisles exist in more than one **TWL Configuration-Warehouse Zone** master record.

1. From the RF **Main Menu**, select **Order Picking**.
2. Select **Pick Options**.
3. Select **Wave**.
4. If you are using a truck, specify the pallet ID on the truck for this picking task. Otherwise, press **Enter** through the **Truck Pallet** field.
5. Select a wave.
6. If multiple operators are picking the same wave, specify the **Zone** and **Aisle**. If you are picking all lines in this wave, press **Enter** as you pick through the wave.
7. Select a line item and press **Enter**.
8. Scan or specify the picking location, the product number, and the quantity picked.

   If a lot number was assigned to the line item, press **F6** and the **up arrow**, then scroll to the right to view the lot number.
9. If you are in a pick-to-tote warehouse, scan the pallet or tote ID. If your warehouse is pick-to-pack, scan the carton ID.

Picking by order

Use picking by order to expedite an order.

1. From the RF **Main Menu**, select **Order Picking**.
2. Select **Pick Options**.
3. From the **Order Picking - Pick Options** menu, select **Order**.
4. To view a list of all orders, specify the **Truck Pallet** and select **All Assignments** to show a list of orders.
5. To select the order to pick, press **F11** and then press **Enter**.
6. You can also scan an order from the RF**Inquiry Screen** order list. The cursor is displayed in the **Sfx** field for you to specify the order suffix.
7. Select a line item and press **Enter**.
8. Scan or specify the picking location, the product number, and the quantity picked.

   If a lot number was assigned to the line item, press **F6** and the **up arrow**, then scroll to the right to view the lot number.
9. If you are in a pick-to-tote warehouse, scan the pallet or tote ID. If your warehouse is pick-to-pack, scan the carton ID.
10. To return to the **Main menu**, use the back button in the TWL RF browser.

Picking by zone

Use picking by zone if your warehouse was set up by zones to organize products and to facilitate picking.

1. From the RF **Main Menu**, select **Order Picking**.
2. Select **Pick Options**.
3. Select **Zone**.
4. If you are using a truck, specify the pallet ID on the truck for this picking task. Otherwise, press **Enter** through the **Truck Pallet** field.

   If you have been assigned to a zone, specify the zone and press **Enter**. To view a list of all zones, press **Enter** and select **`Yes`** to view all zones. Scroll through the list and select the zone to pick.
5. Scroll to the right to view this information:
   - Zone
   - Aisle
   - Location
   - Item
   - Description
   - Quantity
   - Unit of measure
   - Pick ID, internal tracking number
   - Order number
   - Suffix
   - Pallet
6. Select a line item and press **Enter**.
7. Scan or specify the picking location, the product number, and the quantity picked.

   If a lot number was assigned to the line item, press **F6** and the **up arrow**. Then scroll to the right to view the lot number.
8. If you are in a pick-to-tote warehouse, scan the pallet or tote ID. If your warehouse is pick-to-pack, scan the carton ID.

Serial and lot numbers

Serial numbers are unique identification numbers that track a product from manufacturing to the final sale to the customer. Tracking may be required beyond the sale when service or replacement is required. Each unit of a serialized product must have its own serial number. Each serial number must have a unique record in the system that tracks this information:

- Receipt date
- Cost
- Order number
- Customer purchasing the product

- Invoice number
- Price
- All pertinent dates

Parameter 3606, Pick/Pack Serial Scan Confirmation, controls whether a serial number is verified during the picking and packing tasks.

The serial number entry field on the TWL RF unit allows entry of up to 30 characters. The serial number value is then validated by the **Product Extended Serial Formatting Setup** functionality. Specific characters are removed, resulting in the 20-character, or less, serial number required by Distribution SX.e. A message is displayed at each of these serial number validation points when there is no **Product Extended Serial Formatting Setup** record set up for that vendor, or when the resulting number is more than 20 characters. The message is: `Serial Number cannot be longer than 20 characters. Please re-enter.` Serial number validation occurs immediately upon entry wherever serial number entry is available in the TWL RF. Ensure that your **Product Extended Serial Formatting Setup** records are set up appropriately.

Lot-controlled products are manufactured and warehoused with unique identification numbers. Parameter 7506, Allow Multiple Lots Per Location/Pallet, controls where each lot is required to be stored. When set to **No**, then you can put more than one lot in a location. The location must be a defined as a pallet location and the lots must be on different pallets. This storage distinguishes the lot numbers and facilitates the picking task.

If lot numbers are not specifically assigned in the system, the first available lot is found by TWL. It is found based on the assigned location type that contains the largest quantity of available stock. If the location type is not specified, lots are selected by TWL alphabetically. When the product has an expiration date, a validation is made by TWL. This is to ensure the expiration date is greater than the date you drop the order.

Parameter 7510-Order Drop By Lot Size controls the automatic lot allocation based on fewest lots required.

If the lots are not already entered manually when the order drops, the preselection automatically selects the fewest number of lots per location and lot number for picking. Additionally during the picking process, if manually selected by the picker, the next predetermined lot location and numbers is then preselected. The assigned lots directs the picker to the least number of lots. This enables the operator to pick from a single lot or the fewest number of lots that can be used if no single lot is able to fill the pick quantity.

This functionality increases productivity and supplies the customer with materials from as few lots as possible, which minimizes the potential for variation in product.

Assigning serial or lot numbers

1. In the RF, initially, use the instructions for picking an order by wave.

   See Picking an order by wave on page 22

2. After picking a serial product, scan the serial number and continue to step 3. If you are picking a lot product, go to step 4.

Note: The serial product's **Control** option may be set up in **Product Warehouse Product Setup** to assign the serial number at **Sales Order Entry**. In that scenario, you are not required to scan a serial product on a non-Direct Order (DO) transfer during picking and packing. If the transfer is a DO, you are required to enter the serial number, regardless of the **Product Warehouse Product Setup** setting.

3. Rescan the serial number. You are required to scan the same serial number twice before you can continue.
4. If a specific lot number is specified on the order, then scroll to the right to select the correct pallet.
5. If a location contains more than one lot, a **Please Choose Item** screen is displayed for you to select the picking pallet. Scroll through the list and make your selection.
6. If the lot number was assigned when the order was created, and you selected a different lot, a **Pick From Label** screen is displayed.
7. If you selected **No** in the previous step, the `Try another location?` question is displayed. You can select **Yes** to select the lot from a different location.
8. Complete the order.

Pick adjustments

The warehouse manager can restrict the RF picker from adjusting a product category for an order while the order is being picked. Alternatively, the manager can enable the picker to add or change a category. Product categories are set up in **SA Table Code Value Setup**.

The RF picker can change or add a product to an order during picking to complete an order. For example, an order may contain a line item for cut wire and a line item for a reel. After the wire is cut, the picker determines the reel on the order is not correct. The picker could create another order for the correct reel, and zero pick the line containing the incorrect reel. Instead, the picker can add or change a product category to select the correct reel. If changes are restricted, then the operator can change the product to another product with the same product category. Kit products are excluded from this function.

After a pick adjustment is made, a new pick label may be required. You can reprint or make updates to pick labels in using the **Reprint Picking Lbl** option in the **RF Order Picking** menu in TWL.

If an existing pick label is not able to be found for updating or reprinting, an error message displays: `Pick Not Found, Cannot Reprint`.

Note: If a picker short picks a line item that was added, the system is updated with the original quantity ordered. To create a back order for the remaining quantity, the order must be modified in **Sales Order Entry**, and the quantity shipped-reduced before it is picked. If a picker changes the product on a line item, special line discounts and product-related information are lost. Record removals are limited to the line items the picker adds. New line items are added to the order when it is processed in **WL Entry Batch Shipping Report**.

Allowing changes during picking

1. Select **TWL Outbound > Picking > Product Category**.
2. Specify a warehouse and click **Search**.
3. To load any new product categories from **SA Table Code Value Setup**, click **Synchronize**, and click **OK**.
4. In the grid, select the product category to enable or restrict.
5. If you are adding a new product category, click **New**, complete the fields, and then click **Save**.
6. In the grid, select one of these options:
   - **`Allow Add`**
   - **`Allow Change`**
   - **`Restrict Change`**
7. Click **Submit**.

Printing pick labels

A pick ticket prints out what needs to be picked to fulfill an order. In Distribution SX.e, the **Sales Entry Pick Tickets Report** is run to print tickets. An order only goes to TWL when it has been printed with the **Sales Entry Pick Tickets Report**. A physical label can be printed during the **TWL Order Drop** process based on the system parameter 25 and 2025 settings. These are known as Order Drop labels. These labels can be used to assign and guide picking. By default, a separate label is printed, but can be modified to the type of picking your warehouse performs. Order Drop labels can be reprinted by undropping and redropping the order. During the **TWL Order Drop** process, orders are dropped to the warehouse floor for picking whether labels are printed or not. After the orders have been dropped, the pick requests for the orders display on the Radio Frequency (RF) units.

During picking, the RF operator has the option to print labels to mark what they picked based on system parameter 1019. These are known as Pick Labels and are used to mark the product picked with information such as what order and customer it is for. Picking labels then may be attached to the picked products by the pickers. Pick labels can be reprinted as required by selecting the **Reprint Picking Lbl** option in the **RF Order Picking** menu.

Short pick

How to route pickers in the most efficient manner is determined by TWL, according to the information contained in the database.

If a line or an order cannot be filled in its entirety, one of these parameters determines what occurs:

- Parameter 1050, Picking Options
- Parameter 7001, Ship Complete Pick Short Dialog

Parameter 7001 applies to Ship Complete orders and Ship Complete Lines only. If a Ship Complete line or order is placed on hold, you can remove the Ship Complete status in **Sales Order Entry**. After the order is reprinted, the order in updated in TWL. You can then remove the hold in TWL and short pick the line or order. The removal of the Ship Complete disposition for a line or an order is displayed in **WL Transaction Inquiry**.

Short picking

1. When you extract less than the quantity that is required from a location, a question is displayed in the RF: `Are you sure?`

   The message shows both the quantity to receive, and the quantity entered.

   Specify a **Re-Count** quantity.

2. If the confirmation quantity is still less than the quantity that is required, a question is displayed: `Short 1. Pick More?` Select **`Yes`**.

   Future locations to send the picker to are determined in the system. These locations are reviewed in this order:

   - Pallet primary location
   - Full-case primary location
   - Split-case primary location
   - Non-primary locations.

   The stock in these locations are qualified by checking that these conditions exist:

   - Stock has the same status
   - Location has not been previously rejected for the pick
   - Location is active
   - Location is not in a discrepancy or damaged goods zone
   - Quantity in the location is not reserved or negative

3. The only location available may be the current location, because it contains other pallets that have not been rejected yet. If so, then look on another pallet within the same location to find more inventory.
4. If the required inventory cannot be found, then a message indicates that the search has ended.

Undo pick

When you undo a pick by order, a question is displayed in the RF: `Unpick Zero Picked lines as well?`

You can select **`Yes`** to unpick or reset the pick records that were originally allocated. If yes, then this action puts the pick records into an intermediate stage. You can then pick the lines again without undropping the order.

If you try to undo a pick for a **Sales Order Entry** or **Transfer** order, then the transaction is checked. This check is to determine if a host carrier is specified on the order. When a host carrier is specified, a check is made to determine if there is an active PAK transaction in the system. This table shows how you can proceed:

If	Then
An active PAK transaction exists	You can undo the pick and the active PAK transaction is inactivated. A new transaction record is created to specify this information: • Employee that unpicked the order • The date and time • The order transaction history • The unpick transaction
An active PAK transaction does not exist	It is assumed that a shipping interface has already started processing the transaction, and this message is displayed: `Active PAK Transaction For Order Not Found On Host System.`

If packages for the order have already been processed, this message is displayed: `Cartons Already Processed On Host System. Undo Order Pick Not Allowed.`

Because the order is in the process of being shipped, you cannot undo the pick.

Zero ships

A product that is zero picked or zero shipped usually indicates an inventory discrepancy between the system and TWL. When parameter 7002, Review Zero Ships, is set to **`Yes`**, you can review zero shipped pick records that were allocated before the system is synchronized. Reviewing zero shipped pick records provides you with the opportunity to fix inventory discrepancies and pick the lines without undropping the order.

Reversing picks

You can return picked products to stock for one reason or another. These steps return a product to the location from which it was removed during the picking process. These steps also return the lines to the original wave so they can be edited or canceled, if required.

1 From the RF **Main Menu**, select **Order Picking**.

2 Select **Undo Options**.

If you select **Undo Line**, proceed to step 10.

3 Select **Undo Order**.

4 In **Undo Pick by Order**, specify the order number.

You can scroll to the right to view additional information on the browse. Order numbers begin with ‘o’ and contain eight digits plus a two-digit suffix. For example, the system assigns an order number of 5061-00. In TWL, the number is o0000506100.

5 Press **Enter**.

6 Verify the lines on the order and ensure the cartons, totes, pallets, and everything associated with the order is accounted for. Select **Yes**.

7 Scan the location to which you are returning the products. This location should be a staging location; all lines on the order are assigned to that location. The products must be put in their dedicated storage locations at a later time. If you cannot find all the containers that are associated with the order, then cancel the task.

8 Scan the pallet. A question is displayed: `Unpick Zero Picked lines as well?`

9 Select **Yes** to unpick or reset the pick records that were originally allocated. This option puts the pick records into an intermediate stage so that you can pick the lines again without undropping the order.

10 If you selected **Undo Line** in the **Undo line - Order Picking** window, then scroll to the right to view additional information.

11 Scan one of these IDs to identify where the picked material is located:

- Carton ID
- Tote ID
- Pallet ID
- Cart-Bin ID
- Pick ID

Note: The **Undo Line** functionality can be used on a truck pallet with the order in **Loaded** stage.

Note: You can use TWL RF to unpack or unpick a line on an order. An order may be assigned to a host-managed carrier and a line unpick is performed. If so, then the **WL Transaction Inquiry** PAK transaction is moved to **Inactive** when the TWL order is moved back to **In_Pick** status. When the order is finalized again in TWL, a new **WL Transaction Inquiry** PAK transaction is created with the correct updated quantities from TWL. Multiple orders may exist within a container, and one of those orders may have been shipped. If so, then the undo-by-line action is blocked, similar to the undo order action for host-managed carriers.

12 After the order data is retrieved, the **Pick Detail** window overlays the **Undo Picking** window. The products picked for the order show on the browser window. Drill down on a product to view detailed product information.

13 Select the product to return to stock. The line item details show on the screen. The location can be overridden if you are placing the product in a different location. Scroll to the right to view additional information on the browse.

14 Specify the quantity you are unpicking. The location and pallet ID, if applicable, show on the screen. If the location was defined as a pallet location, then the pallet from which material was picked is displayed in the **Pallet** field.

When you press **Enter** from the **Pallet** field, the cursor activates the **Item** field. You can scan the next product to be returned to stock.

15 Repeat steps to unpick additional products. When all lines have been unpicked, a message is displayed: `There are no picks left to undo.` Select **OK**.

After the products have been unpicked, the transaction detail shows a positive and negative pick, which offset each other.

16 Use the back button in the RF browser to return to the **Order Picking Main Menu**.

Broken case picking

To reduce travel, parameter 2111, Partial Primary UOM Pick, may be set to **`Yes`**. If so, then a picker can to break a carton in a full case primary location and remove individual units to fill an order line. The individual unit is EACH.

For example, a case contains 20 units, and 5 cases are in the full-case primary location. No units are in the split-case primary location or overstock location. The quantity ordered is 25, and the picker is directed to the full-case location. Because a case contains 20 and the entire quantity to pick is 25, the picker must break a case. The picker must remove 5 units to complete the pick request. This table shows the condition, and the number resulting for a full case, split case, and overstock:

Condition	Full Case	Split Case	Overstock
Beginning quantity	5 cases of 20	0	0
Pick request	25 units	0	0
Quantity remaining in location	3 full cases of 20		
15 units from broken case	0	0	

After the type of location is selected in **Order Drop Manager** and sent to the picker, the wave data is transmitted to the RF units. The maximum wave number is 9,999,999.

Lost business reasons

After placing an order, customers frequently cancel line items and orders for a variety of reasons, such as: pricing, failure to deliver on time, and lack of product availability.

Use the RF to cancel a line, or mark a line as lost business, from an order that has been dropped to the floor. These line items cannot be recalled for editing, but they remain in the system for inquiry and reporting purposes. When you cancel a line, you must assign a lost business reason. All file updates are reversed, such as Inventory Control, serial/lots, kits, Price/Discounting, and order header. The line no longer shows on the order.

You can cancel a line on stock orders. You cannot cancel lines on any other **Sales Order Entry** order type, warehouse transfers, or kit work orders. Lines added to an order from the RF, and then canceled from the RF, are not considered lost business and do not update the system. The line is canceled when

processed through TWL to the Packing List print in the system. Processing is handled, either through **WL Entry Batch Shipping Report**, or when shipped in a shipping interface. The order header is recalculated to update the order with the lost business line item.

Categorizing the reasons business is lost is important for improving profitability. Entering a lost business reason provides useful information and can indicate areas for improvement through report analysis. The lost business reason codes are set up in **SA Table Code Value Setup**, and analysis is provided through the **SM Lost Business Report**.

Canceling a line item

1. From the RF **Pick Selection** screen, use the **arrow** keys to highlight a line item.
2. Press **Ctrl+D**.
3. In the **Order Picking-Pick Selection** screen, a question is displayed: `Delete this line?`. The **Line** and **Product** number are displayed. Specify **`Yes`**.
4. In the list of lost business reasons, scroll through the list. Press **Enter** on the code that best describes the reason the line item was canceled.
5. When the **Pick Selection** screen is displayed, continue picking line items.

Move pick request

The independent actions of multiple operators can create potential conflicts to the products in a location. Picking tasks are given priority over stock adjustments.

For example, a stock adjustment may have been set up to remove the entire contents of a location. However, inventory in that location has been reserved for active pick requests. In this scenario, there must be additional stock in that location or on another pallet to accommodate the pick request. Otherwise the stock adjustment is not allowed to occur by TWL.

The RF**Order Picking Main Menu** contains the **`Pick Move`** option. Use this option to move pick requests to another location to redirect the picker. The **`Pick Move`** option also updates the system with accurate data.

Moving pick requests

1. From the RF **Main Menu**, select **Order Picking**.
2. Select **Pick Move**.
3. In **Order Picking - Pick Move**, scroll through the list of open pick requests with the **arrow** keys and select one to move.

4 If applicable, in the screen that shows a list of locations, select the location to which to move the pick request. The screen shows a list of locations containing the same product, the quantity, and the lot number.

5 In the confirmation, select **Yes**.

6 To move the pick request, select **Yes**.

7 To move all existing pick requests from this location, select **Yes**.

   If the source location is a primary pick location for the product, a message is displayed: `The from location is the primary pick location. Do you want to move the picks?`

8 Select **Yes** to move the pick requests from the primary location to the selected destination location. The **Pick Move to Location** window is displayed and you can continue moving pick requests, or press the back button in the RF browser to return to the **Order Picking Main Menu**.

An activity, such as a put-away request or stock movement, may trigger a location change for a product that is ready for picking. The pick request is updated by the system. The updated pick request includes the new aisle and product location so that you are directed to the correct location.

Clearing a cart

If you are picking by cart, totes may be associated with orders and bins. The cart must be separated from the totes after you are finished. The cart can then be used while the totes are removed and staged for packing. After the cart reaches a packing area, use this procedure to finish the picking process.

1 From the RF, select **Clear Cart**.

2 Scan the cart ID from which the totes are being removed. The cart ID is verified.

3 When the totes associated with the cart are displayed, select or scan the tote ID. This function removes the links between the totes and the cart.

4 Repeat the steps until all totes have been removed from the cart.

Cross references

The standard default cross reference type, which is defined with parameter 1024, Default Item Type, can be product, UPC, or vendor product cross-reference. These types are checked first and if a suitable cross reference is not found, then other cross-references are checked.

Hazardous materials

If a product is potentially hazardous, that product must be marked according to government regulations. An Material Safety Data Sheet (MSDS) must be shipped with the product or mailed at a later time.

Your warehouse may include the MSDS as part of the picking process. If so, then you should be aware of the products that are considered hazardous and handle them accordingly.

The package that contains the product must be clearly marked for health and safety concerns. The **Product Setup** record indicates if a product requires an MSDS. Orders with MSDS products are released to TWL with the notification, and the MSDS must be picked and sent with the order.

When you are packing a carton or pallet with an MSDS product, specify the MSDS sheet number. The number of the MSDS scanned or entered must be identical to the sheet number on the **TWL Configuration-Item** master record; the number is validated during packing.

Remanufactured core products

Dirty core and remanufactured core products can be processed in TWL. The **WL Entry Batch Shipping Report** and the**WL Entry Batch Receiving Report** automatically update the implied core charge lines from the remanufactured item's quantity. These reports also update the dirty core and remanufactured core product data in the system. The system cores data is updated in these areas:

- **Product Adjust Core Master Entry**
- **Product Adjust Core Allocation Entry**
- Internal cores transaction table (iceat)
- Cores vendor table (iceav)

The transaction and vendor tables, although not entry functions in the system, can be viewed in **Product Core Inquiry**, along with the master data and allocation data.

Line items for implied core charges from the order, purchase order, or warehouse transfer are not sent to TWL. This is because they are labor lines and are attached to the remanufactured core item's quantity. Labor items are not processed by TWL and they are not part of the **TWL Configuration-Item** master record. Core items are not supported in Value Add; therefore, they do not flow through to TWL on a VA order. Lot-controlled core items are not supported in the system or TWL.

Post-picking processes

Your warehouse may vary by layout, available workspace, and warehouse parameters. Depending on these factors, completed picks are staged to an intermediate sortation area, packing area, or directly to the shipping dock. After the orders have been staged, the identity of every picking or shipping container, its contents, and its destination is recorded in TWL.

Staging picked products

A multiple-line order can require unit load picks, case picks, and unit picks. Several order pickers may be required to fill one order. You can assign a staging or sortation area to ensure all line items on the order are gathered and packaged together. The line items accumulate in the sortation area until all

lines for the order are complete. In the RF **Staging Loc Movement** screen, you can stage products by pressing **F7**.

The last active container is the default and is automatically displayed on the screen. You can override the default by scanning another container. When you place a tote, carton, or pallet in a staging location, a container that was staged for the same customer is validated by TWL. If one exists, the existing staging location for the customer is the default. If one does not exist, you can scan another staging location to place the container in.

Staging location inquiry

A special staging location inquiry is available by pressing **F8**. You can find out what is in the staging locations by performing one of these procedures:

- Scanning a container or location
- Specifying an order number, customer number, ship-to number, or carrier

The qualifying products that fit the criteria you entered are displayed in the RF **Staging Loc Inquiry** screen.

You can view the customer, ship-to destination, ship-to name, and order number by scrolling to the right. You can change the value in the **Container** field. If you change the **Container** field, the screen shows the customer number, carrier, and services that are associated with the orders in the container type being staged. The **Container** field options are tote, pallet, or carton. To remove a container from the staging location, scan the container.

Container inquiry

On the RF**Order Picking Main Menu**, in the **Order Picking Detail Inquiry** screen, the contents of containers associated with a specific order may be shown. Parameter 7501, Order Container Inq, must be set to **`Yes`**. With this inquiry, you can determine the status of the order for customer service issues. This inquiry is also helpful during packing and ship verification to ensure the order is complete.

Parameter 5253, Carton Sortation Verification, improves shipping accuracy by verifying the cartons scanned onto a shipping pallet. In TWL, you can limit a shipping pallet to the ship-to address of the first carton scanned onto the pallet. You can also limit the shipping pallet to a single carrier. Scanning orders with different carriers prompts a message to be displayed. A warning message is displayed if the default for parameter 5254, Carton Sortation Verification – Hard Stop, was accepted and if these conditions exist:

- You scan a different ship-to address onto the pallet
- The criteria that is specified on parameter 5253 does not match

Carton information

The **Order Carton Information** inquiry is available from **TWL Outbound-Shipping-Order Carton Info**. Shipping pallet IDs are displayed on this inquiry to facilitate carton sortation.

Packing

Pick-to-tote warehouses use the packing functions. Packing is unnecessary if your warehouse is using pick-to-pack or the order is a Counter Sale or Point of Sale order. A product's pick-to-pack option is set by your TWL administrator in the item master record, in **TWL Configuration-Item-Miscellaneous**.

Packing lists

The system packing list may also be known as a packing slip. A packing list can be automatically printed with updated quantities and carton information from TWL when it is moved to the packed stage. You can reprint the list while the order is in the packed stage. If your warehouse is pick-to-pack, the list prints when the order is fully picked. If your warehouse is pick-to-tote, the list prints when the order is fully packed.

Packing operators can select a specific printer in **TWL Order Packing** instead of having to use the preselected default printer based on what is valued in the **TWL Outbound-Shipping-Carrier Master** record. This reduces time spent at packing list printers because more packing list printers are being used. Additionally, this saves packing operators time by having printers close to the packing station accesible instead of only having the shipper-designated packing list printers available. Shipper-designated packing list printers may be far away from the packing station. However, if the packing operator does not select a printer to associate to the packing station, then the packing lists will be sent to the printer identified on the **TWL Outbound-Shipping-Carrier Master** record.

TWL system parameter, 5260-Allow Report Printer For SX.e Pack Slip, enables the operator select a specific packing list printer instead of using the default printer. The parameter defaults as unchecked, meaning the printer specified on the carrier master record is used.

The packing list is printed if your TWL administrator has implemented the setups, and if you have appropriate security. For example, the **`Print`** option in **TWL Outbound-Shipping-Carrier Master** is selected and the printer is specified. This setting creates a new transaction type in TWL when the order is packed. The transaction type is PR and is synchronized to the system using the upload type. These transactions can be viewed in **WL Transaction Inquiry**. In Advanced Search, select **`Received`** in the **Trans Type** field, and **`Print Pack`** in the **Process Type** field.

The **WL Transaction Inquiry** transaction updates the order with the quantities packed in TWL. If an order is being maintained in **Sales Order Entry** at the time of the update, the transaction cannot update the correct quantities.

If a print job is lost or if you need another copy, you can reprint the packing slip from the TWL RF by pressing **F9**. You receive a prompt asking for the order to print. The last order that is packed during the current user session is the default, or if none have been processed, the field is blank.

If a confirmation that the print job has been sent is required, the parameter 5255, Display SX.e Pack Slip Confirmation, must be set to **`Yes`**. You receive a message for each order that automatically prints along with the corresponding printer set up under **TWL Outbound-Shipping-Carrier Master**.

The Distribution SX.e packing list format that prints is designated in **SA Administration-Administrator Options-Documents-Sales Orders-Printing**.

When printing from TWL, the carton information always prints. When reprinting a packing list from the system, the TWL carton information must be included, otherwise the carton information does not print. Whether to include this information is determined by your TWL administrator when TWL is implemented. This setting is company wide, and is not warehouse-specific.

Packing by order

Packing procedures are determined by warehouse parameters. Therefore, your procedures might vary from these instructions.

1. From the RF **Main Menu**, select **Packing**.
2. From the **Order Packing/Sortation Main Menu**, select **Packing**.
3. In **Order Packing/Sortation - Packing**, scan the carton and pallet or tote ID. The contents of the pallet or tote are displayed. If the order is picked by cart, and the default bins are used, the system-assigned cart bin is the pallet or tote number.
4. Scan the product. Scroll to the right to view additional information on the browse.
5. Specify the quantity you are packing. If a quantity of 1 is displayed when the product is scanned or specified, the product must be verified for each unit being packed.
6. If the product is a hazardous, serial, or lot product, scan or specify the information as prompted by the system. Scan the MSDS sheet you are packing with the product.
7. You may be prompted to verify the serial number, if parameter 3606, Pick/Pack Serial Scan Confirmation, has been set to **`Yes`**. Verification of the serial number ensures you have accurately captured the serial number, which is needed for warranties and returns.
8. When you have packed all items in the container, a question is displayed: `Tote is empty. Close the carton?`

   Specify one of these options:

Option	Description
`Yes`	The **Order Packing** window clears for you to continue packing.
`No`	It is assumed by TWL that you prefer to continue packing into this carton. Select another tote or pallet to select products.

   After you are finished packing, if your warehouse uses a shipping interface to ship orders, a PAK upload is prepared. The package ID can be accessed in the shipping interface for shipping.
9. To return to the RF **Main menu**, use the back button in the RF browser.

Staging locations

You can stage a tote, carton, pallet, or shipping pallet from any screen on the RF.

1. From the RF, press **F7** to access the staging location function.

2 In the **Staging Loc Movement** screen, the last container you worked with in receiving, picking, packing, or shipping is initially the default value in the screen. Accept the default container or scan a new container ID. The current containers staged for the same customer are displayed after you press **Enter**.

3 If you scan a container that is already in a staging location, you can specify a different location. This action moves the container from one staging location to another.

4 Optionally, scroll to the right to view additional information.

5 Scan the staging location in which you are placing the container. If you press **Enter** on a blank field, a list of valid staging locations is displayed.

6 After you select a staging location, you are asked to verify the location.

Specify one of these options:

Option	Description
Yes	To verify the location
No	To be prompted to scan another location

You can cancel the procedure by pressing **F4** at any time.

7 To inquire on a staging location, or retrieve a container from a staging location, press **F8**. You can access the staging location inquiry from any screen on the RF.

8 In **Staging Loc Inquiry**, scan the container or location and press **Enter**.

If you scan a container ID, the cursor is displayed in the **Retrieve** field instead of the browse. This selection streamlines the processing because you already identified a container. If the staging location contains products, they are displayed on the **Staging Loc Retrieve** screen.

9 You can also specify an order number, customer, ship-to location, carrier, or leave any field blank. Leave the field blank to look at all values for that field. However, a partial or invalid entry cannot find any matching criteria in the staging file.

10 To view additional information, press the **up arrow** to highlight the staging location and scroll to the right. To retrieve the container, press the **down arrow** and change the **Retrieve** field to **Yes**.

Verifying an order

If several order pickers are needed to fill one order, a staging or sortation area must be assigned. This action ensures all line items on the order are gathered and packaged together. Gathering is especially important with complicated orders because the products must be verified, packed, and labeled for shipment.

1 From the RF **Main Menu**, select **Packing**.

The **Order Packing/Sortation Main Menu** is displayed. The products in the carton show a ‘v’ next to the quantity. As you verify the quantity, the ‘v’ disappears. Scroll to the right to view additional information on the browse, or press **F6** to view detailed product information.

2 Select **Order Verification**.

3 In **Order Verification - Packing**, scan the carton ID. The order number, products, and quantity contained in the carton are displayed.

4 Scan the product number and specify the quantity.

A message is displayed: `Is there anything left in the carton?`

Specify one of these options:

Option	Description
Yes	The cursor activates the **Carton** field and you can continue verifying orders
No	The message is displayed: `Carton xxxx Verified`"

Sorting cartons

This procedure enables you to sort and consolidate cartons that have been packed by different pickers or picked at different times. The first carton you scan onto the pallet assigns the pallet a shipto destination. You are directed to a pallet that contains packed cartons with the same destination. This consolidates orders on pallets for inspection and shipping efficiencies.

Parameter 5253, Carton Sortation Verification, determines the level of verification required when you put a carton on a pallet. Parameter 5254, Carton Sortation Verification - Hard Stop, determines whether a warning message or hard stop is generated when the verification required is not met. These parameters affect your carton-sorting verification.

1 From the RF **Main Menu**, select **Packing**.

2 Select **Carton Sortation**.

This screen shows the customer and ship-to location; or carrier, based on parameter 5253. The **Customer** field is blank for outgoing warehouse transfers, and the ShipTo warehouse is displayed.

Parameter 5253 specifies one of these options:

- No verification
- Verify each order placed on the pallet is for the same carrier
- Verify each order placed on the pallet is for the same ship-to address
- Verify each order placed on the pallet is for the same carrier and ship-to address

3 Scan the carton ID. Scroll to the right to view additional information on the browse.

4 Scan the pallet ID on which you placed the carton. If you are creating a new shipping pallet, a question is displayed: `We are creating a new pallet!`

5 Click **OK** to create a pallet for the customer or destination.

Each time you scan a carton for the same customer, you are prompted with the pallet number for verification. Use this action to consolidate the original pick, any back orders as they are filled, and any additional orders for that customer.

6 If parameter 4000, Delete Carton Sortation Pallets, is set to **Yes**, you can reuse the sortation pallet ID after the order has been shipped. The carton information is the only record retained in the system.

7 Press **Enter** to clear the screen.

8 Press **F4** to exit.

Transferring containers

You can use this procedure to combine the contents of a tote, carton, or pallet. When multiple containers exist for a customer, consolidation minimizes the number of containers being shipped to the same location. Parameter 1060, Carton Validation, verifies a carton transfer based on the level of validation chosen. Parameter 1054, Tote Validation, validates tote-to-tote transfers.

1 From the RF **Main Menu**, select **Packing**.

2 Select **Transfer Options**.

Specify one of these options:

If	Then
You are transferring the contents of a tote or carton	Select the type of transfer to make.
You are transferring the contents of one tote or carton to another tote or carton	Select the **Tote to Tote** or **Carton to Carton** option. The **Tote to Tote Transfer - Packing** or **Carton to Carton Transfer - Packing** window displays. Scan the source tote or carton, specify the quantity transferred, and scan the destination tote or carton.

3 If you are transferring a carton to a different pallet, then select the **Pallet Transfer** option. The **Pallet Transfer - Packing** window is displayed. Scan the carton being moved. The carton information is displayed.

4 Scan the destination pallet ID. Destination pallets do not have restrictions. You can put the carton on an existing pallet, on the pallet the carton was originally assigned to, or create a new pallet ID.

5 If the destination pallet ID is not on file, then a question is displayed: `This pallet is not on file. Want to create one?`

Specify one of these options:

Option	Description
Yes	Creates a new pallet
No	Clears the screen and you can select another destination pallet

6 Repeat the steps to complete your transfer.

7 When you are finished, press the back button in the RF browser to return to the RF **Main Menu**.

Preparing for shipping

After packing is complete, and before the packages are shipped, you can assign a tracking ID. You can also change the carrier that is assigned to the order. You can also perform various inquiries from the RF unit.

Assigning a tracking ID

You can assign a tracking number to a package based on settings. The **TWL Outbound-Shipping-Carrier Master** record must be set to not require you to specify a Shipping Container Marking (SCM) label number when you pack the order. The tracking number is for internal purposes and is not recorded in the system or a shipping interface.

1. From the RF **Main Menu**, select **Inventory Control**.
2. Select **Item Maintenance**.
3. Select **Assign Tracking ID**.
4. Scan the carton ID.
5. Assign a tracking ID to the carton. The tracking number is available in TWL inquiries.

Changing carriers

If you are using TWL to ship packages, you can change the carrier and service that is assigned to a specific order that has not been shipped. If the carrier is managed by a host, you can change the carrier if the order has not been packed. Synchronization with the system must not have occurred. You can also use these instructions if you are using an external shipping interface and the package has not been fully packed.

1. From the RF **Main Menu**, select **Packing**.
2. Select **Carrier Change**.
3. Scan or specify the carton ID.
4. Specify the new carrier in the **New Carrier** field. All cartons for the order are changed. These entries are validated against the Shipping module.
5. Repeat the steps to continue changing carriers and services or press the back button in the RF browser to exit.

Inquiring on an order

You can also access order inquiry from the **Order Packing/Sortation Main Menu**. Option 1, **Inquiry Options** provides access to **Order Inquiry** and several other inquiries while you are performing packing tasks.

1 From the RF **Main Menu**, select **Order Picking**.

2 Select **Order Inquiry**.

Order numbers begin with an o and contain eight digits plus a two-digit suffix. For example, if the order number that is assigned in Distribution SX.e is 5061-00, in TWL, the number is o0000506100.

3 Use the **arrow** keys to scroll through these menu options:

- Order
- Pallet/Tote/Carton

4 Press **Enter** on the type of inquiry to perform.

If	Then
You select **Order**	Specify the order number and suffix. Use the **Arrow** keys to scroll to the right and view the line item detail. When you press **Enter** on a line item, the **Customer Transaction Inquiry** is displayed and the containers associated with the line are listed.
You select **Pallet/Tote/Carton**	The **Detail Inquiry** screen is displayed and lists the carrier, such as UPS, and service, such as ground. Specify a pallet, tote, or carton ID and press **Enter**

Inquiring on a cart

You can use this inquiry to find out whether a cart is being used and which operator is using a particular cart.

1 From the RF **Main Menu**, select **Order Picking**.

2 Select **Cart Inquiry**.

3 Scan or specify the cart ID.

4 In the details, the inquiry might show, for example, that default bins were used during picking. If totes were associated with the cart, then the tote IDs would be listed.

5 Use the **arrow** key to scroll to the right and view this information:

- Bin
- Tote ID
- Order number
- Suffix
- Status
- Quantity

6 Use the back button in the RF browser to exit.

Inquiring on a shipping pallet

You can use the **Pallet Inquiry** to locate details, such as the customer, carrier, carton ID, and weight of a shipping pallet. If parameter 4000, Delete Carton Sortation Pallets, has been set to **`Yes`**, you can reuse a shipping pallet after the order is shipped.

1. From the RF **Main Menu**, select **Packing**.
2. Select **Inquiry Options**.
3. Select **Pallet Inquiry**.
4. Scan the pallet ID and carton ID. The customer, carrier, carton ID, and weight of the pallet are displayed.

   If a carton is not on a pallet and you press **Enter** through the **Ship Pall** field, a message is displayed. The message indicates the carton is not on a pallet. Click **OK**.

Inquiring on a shipping container

You can use this inquiry to locate details, such as the wave, order, customer, status, and description of the container.

1. From the RF **Main Menu**, select **Packing**.
2. Select **Inquiry Options**.
3. Select **Container Inquiry**.
4. Specify the container ID. The the wave, order, customer, status, and description of the container are displayed. These item details display in the grid below:
   - ID
   - Order #
   - Order Suffix
   - Amt
   - Status
   - Quantity
5. When you have completed your inquriy, return to the **Main menu** using the back button in the TWL RF browser.

Inquiring on a carton

You can find out which products were packed in cartons using the carton information inquiry in TWL. This inquiry does not include products that were returned to stock.

1. Select **TWL Outbound > Shipping > Order Carton Info**.
2. In the **Search** pane, specify a warehouse.
3. In the grid, view this associated data:
   - Wave number

- Order number
- Suffix
- Carton ID
- Shipping pallet
- Tracking ID,
- Carrier ID
- Status
- Sequence
- Size
- Weight

4 Drill down on a carton line item to view this information:

- Product number
- Description
- Quantity
- Order number
- Order suffix
- Lot
- Serial designation

Reports

To help warehouse managers process orders through picking and packing, reports are available in TWL Web module in **TWL Execution-Reports-Management Reports**. Two often-used reports are the **Outstanding Orders** report and the **Unpacked Orders From Wave to Wave** report.

Outstanding Orders

Use this report to expedite order processing and sort orders that have not been completed. You can use the report options to specify a specific order and suffix, shipto customer, and order status. You can also select specific order types and classes or include all order types and classes on the report.

- You can sort the report by order number, order status, order date, last transaction date, carrier, expected ship date, and ship-to customer.
- The order number and suffix, order date, number of lines, order status, order type, customer, shipping customer, carrier, and wave number show on the report.
- In the **Show Detail?** field, if you select **`Yes`**, the line number, product, requested quantity, actual quantity, status, and carton numbers are displayed.

Unpacked Orders From Wave to Wave

This report lists the orders that went unpacked from wave to wave. The list can be sorted by wave or carrier. The report contains this information:

- Wave number

- Order number or suffix
- Status
- Carrier
- Line number
- Product number
- Requested quantity
- Actual quantity
- Pick location
- Pick quantity

Order notes and line comments

Order notes and line comments are released to TWL during picking and packing when parameters are set and the notes and comments are printable.

In TWL Web module, notes and comments can be accessed from the **Lines** tab in **TWL Outbound-Order Management-Order Drop Manager** and **TWL Outbound-Order Management-Order Inquiry**. Orders with comments are noted in the grid line. Click **Comments** in the grid toolbar to view the comments.

From the RF, order notes are displayed the first time a picker accesses an order. You have the option of viewing the note for each line item. Customer and order notes show on the RF when you select a pick location. If an order contains customer notes and order notes, then the customer notes are displayed first.

If you do not view the notes for each line item, the order notes do not show until you access another order. Then, the notes are displayed when you return to the order containing the notes within a single picking or packing operation. The order notes show again when the order is accessed during packing and quick pack to ensure you view the information. Line comments show each time you select a new line that a printable comment exists.

You can create notes from the RF for all order types that support notes in the system. You cannot use the RF to modify or remove existing notes. Any modification or removal must be done from **Sales Order Entry**, or other modules in the system. You cannot create line comments from the RF.

You can create a note on a customer order and vendor return from the RF **Order Picking Pick Selection** browse and the **Pick From Label** screen by pressing **Ctrl+N**. To change the required and print defaults, press **Enter**. To access the **Prt** field, press **Tab**, and to clear the field, press the **spacebar**.

Communication errors

Under normal circumstances, the communication between TWL and other Distribution SX.e modules in the system do not require maintenance. Although, unusual circumstances may occur and the receipt

of a transaction might not be acknowledged by the system. In TWL Web module, use **TWL Administration-Interface-Interface Inquiry** to view any rejected transactions. You should review transactions in this function periodically. Use **TWL Administration-Interface-Interface Resend** to ensure that all transactions are resent to the system for processing.

Resending a PAK transaction

If an order is being maintained in **Sales Order Entry** at the same time the order is being packed in TWL, then the PAK transaction is rejected. The order manager should resend the order after the PAK transaction is no longer in use.

1. Select **TWL Administration > Interface > Interface Resend**.
2. In the **Search** pane, specify a TWL warehouse.
3. Specify a **From Date**, a **From Time**, a **To Date**, and a **To Time**.
4. In the grid, select the PAK transaction to resend.
5. Click **Resend**.

When the order is released again to TWL, the order can be dropped, picked, and packed.

Chapter 3: Shipping

The shipping process is initiated after picking or packing is complete. Each line item is sent for processing by TWL. Then, a full-order update transaction is sent to complete the shipping process. An order is updated to Shipped status and backorders may be created for the lines that you could not fill.

You can change the carrier code from a valid host-managed carrier to a TWL-managed carrier code in the RF. However, any active PAK transactions are searched for in TWL by the system before enabling you to complete the carrier change. If an active PAK transaction is found, then that transaction is inactivated. A new SHP upload replaces the inactivated PAK transaction to ensure records are synchronized correctly. If an active PAK transaction is not in the interface, then most likely your external shipping interface started updating the order.

Note: If you use TWL to ship, your shipping functions are independent of the **Sales Shipping Feedback Entry** module.

You can use an external shipping interface to ship TWL packages. If so, then a PAK upload is created after the order or transfer has been fully packed in TWL. Work with your external shipping interface representative and TWL administrator to determine and manage any variations in workflow during shipping.

See the *Infor Distribution SX.e Shipping Interface Administration Guide*.

Shipment verification

Orders and transfers that use a TWL-managed carrier require a shipment verification step to upgrade the orders for further processing in the system. This requirement includes inventory that is shipped to an external service provider to complete an external Value Add section. The ship verification process indicates the order is complete and has been released to the carrier.

Your TWL administrator can run **WL Transaction Inquiry** to confirm the receive transaction has been uploaded without errors. The process type is SHP. When the **WL Entry Batch Shipping Report** runs, the orders are updated to Stage 3 (Shipped). The orders are ready to be invoiced.

Your TWL administrator may have set up the **WL Entry Batch Shipping Report** as a stored report. If so, then the active SHP transactions are picked up from the **WL Transaction Inquiry** in the next scheduled session.

Vendor returns synchronize with the system using the **WL Entry Batch Receiving Report**.

Information is synchronized by communication between TWL and the system. This ensures that inventory has been reduced and the customer can be billed for the order. Each line item transaction for line level processing is sent by TWL when an order is upgraded to shipped status.

Opening a shipping dock

Opening a dock and assigning a carrier to the dock creates a shipping master record. After the carrier is loaded and departs, you can release the carrier and log another carrier into the dock.

1. From the RF **Main Menu**, select **Shipping**.
2. Select **Carrier Arr./Dep**.
3. Scan or specify the **Dock ID**. After a dock ID has been entered, the default values set up on the **TWL Outbound-Shipping-Dock Master** record are displayed in **Dock Information**.
4. When the carrier is ready to depart, specify the carrier ID that is picking up packages for shipment.
5. Specify a trailer ID, if required.
6. Specify a route ID for this carrier, or press **Enter** through this field.
7. Press **Enter**. The carrier is logged into the dock and you can begin shipping packages.

Verifying a shipment

1. From the RF **Main Menu**, select **Shipping**.
2. Select **Ship Verification**.
3. Scan or specify the dock ID.
4. Scan the carton or pallet ID. This table shows additional navigation:
5. Specify the weight of the carton or pallet. The value default includes one extra pound to cover the carton and packaging materials.
6. Specify the freight cost.
7. If you do not print manifests while verifying shipments, press **Enter**. Otherwise, to close and print the manifest, specify **`Yes`** when the message is displayed asking if you are done.

   If parameter 4003, Close and Print Manifest, is set to **`Yes`**, you have access to the **`Close and Print Manifest`** option.
8. Press **Enter**. The window clears.
9. Repeat steps as needed to verify additional cartons or pallets.

Closing and printing a manifest

After a carrier is logged into a dock, use these instructions to close and print a manifest.

1. In the RF, specify the dock ID of the carrier that is ready to leave the dock.

2 To print a manifest for this carrier, specify **Yes**. If you do not print a manifest, go to step 4.

3 Press **Enter**. When the manifest is printed, a question is displayed asking if you are done printing the manifest.

4 Press **Enter**. A question is displayed: `Next Dock?`

Specify one of these options:

Option	Description
Yes	To clear the **Carrier Arrival/Departure** screen and log another carrier into the dock
No	To show the **Shipping Main Menu**

Printing a packing list

1 Use these instructions to print a packing list for a carton, order, or wave.

2 From the RF **Main Menu**, select **Packing**.

3 Select **Print Packing List**.

4 Scan the label ID.

5 Use the **arrow** keys to select the type of packing list to print. These values are valid:

- **Carton**
- **Order**
- **Wave**

6 Press **Enter**.

7 In the message confirming the report was sent to the printer, click **OK**.

8 Press **Enter**.

9 Repeat steps to print another list, or use the back button in the RF browser to return to the **Shipping Main Menu**.

Ship-to-dock function

If you use the RF **Ship To Dock** function, you can verify a shipping pallet, rather than verifying each carton on the pallet. All cartons on the pallet must be for the same carrier. When you verify the dock, the pallet and its contents are sent to the dock, and all the cartons for the pallet are shipped.

If you previously sorted a carton onto a ship-going pallet during carton sortation and attempt to ship verify the pallet, a warning is displayed: `Carton on this pallet has already been shipped.`

Because the carton was previously shipped, and this is only a warning, you can continue shipping the pallet. The appropriate adjustments are made by TWL in the background.

Shipping multiple carriers from the same dock

You can use this method of shipping to ship cartons for multiple carriers without switching dock IDs. You can also use these instructions to verify a shipping pallet, rather than verifying each carton on the pallet.

1. From the RF **Main Menu**, select **Shipping**.
2. Select **Ship To Dock**.
3. Scan the pallet or carton being shipped. This table shows additional navigation:

Press	To
Ctrl+L	View a carton inquiry screen
F2	Drill down to the contents of the carton
F4	Return to the previous screen

4. Specify the weight and freight.
5. Scan or specify the dock ID that is assigned to the carrier that ships the carton or pallet. If you scan a dock that was not previously assigned to the carrier on the order, a question is displayed: `Open Dock 1 for carrier <carrier name>?`
6. Specify **`Yes`** to assign the carrier to the dock.
7. Scan the trailer ID, if required.
8. Specify the route ID, or press **Enter** through this field.
9. For manifests, select one:
   - If you do not print manifests while verifying shipments, press **Enter**.
   - To close and print the manifest, specify **`Yes`**. A message notifies you that the manifest is done printing. Click **OK**.

   If parameter 4003, Close and Print Manifest, is set to **`Yes`**, you have access to the **`Close and Print Manifest`** option.
10. Press **Enter** to clear the screen.
11. Repeat steps as needed to continue shipping containers, or press **F4** to return to the **Shipping Main Menu**.

Shipping container marking labels

Parameter 7005, SCM Label Printing, controls how standard Shipping Container Marking (SCM) labels are printed in pick-to-pack and pick-to-tote warehouses. You can print them automatically, in a batch process to be printed later, or manually print the labels from the RF. If the **Capture Tracking ID** field on the **TWL Outbound-Shipping-Carrier Master** record is selected, then RF operators are required to enter a tracking ID. If the **Shipper ID** field in the master record contains a value, then the tracking ID must begin with the shipper ID.

If you automatically print SCM labels, then the labels are printed by the **SCM Printer** defined on the **TWL Outbound-Shipping-Carrier Master** record. No X of Y information prints on the label because the order is still being packed.

If parameter 7005 is set to **`Employee`**, SCMs print from the RF **Create SCM Label** screen by entering an **Employee ID**. Then a transaction is created to batch print the SCM label at a later time. The label printer selected by the RF operator prints the labels. Carton X of Y information prints on the label if that information is available.

If parameter 7005 is set to **`Manual`**, SCM data is collected during the packing process. Labels can be printed manually using the RF **Create SCM Label**. Carton X of Y information prints on the label.

Printing a SCM label

The label prints the shipto address and a return address on a 4 x 6 label. The standard Shipping Container Marking (SCM) label does not include logos or custom information. Use these instructions if you are printing to a batch or manually printing a SCM label.

1. From the RF **Main Menu**, select **Shipping**.
2. Select **Printing Menu**.
3. Select **Create SCM Label**.
4. Scan the pallet or carton, or enter your employee ID if you are batch printing. The type code and package information are displayed according to the label you scanned.

   The type code is displayed according to the container number. If you specify any other character, a message shows the valid types.
5. Specify the weight of the container. A list of printers is displayed. A tracking ID may be required, depending on the carrier.

   The tracking ID that is assigned during SCM label printing is carried forward to the carton record on the manifest.
6. Use the **arrow** keys to mark the printer and press **Enter** to select a printer.

   You can choose a different printer to print shipping labels by pressing **Alt+L**.
7. A message is displayed notifying you when the SCM label has printed. Press **Enter**.
8. In the **Create SCM Label** screen, you can continue scanning cartons. Or, if you are finished printing SCM labels, use the back button in the RF browser to return to the **Shipping Print Menu**.
9.

Shipping manifest

In **TWL Outbound-Shipping-Shipping Manifest**, if you are a TWL administrator, you can access an inquiry function. You cannot create, maintain, or delete shipping manifests in this function. Several methods are available for conducting searches and inquires, and for filtering results:

- Use the **Search** pane to filter for warehouse, manifest, and carrier. These fields are the primary fields for the shipping manifest data. You should know the manifest number to review or for what carrier the manifest was created.
- Use **Advanced Search** if, for example, you do not know the specifics, but might know something else about the manifest you are looking for. This search contains the same fields as the Search pane, and in addition, you can filter for the dock, trailer, and shipping date.
- For the **Ship Date** fields, you can specify the From and To dates. When the search is executed, a time of 0000 or midnight is added to the From date you specified. A time of 2359 is added to the To date, so that all manifests that are shipped on that day are included.
- You can drill down into a shipping manifest, review it, and then come back to the master grid where another shipping manifest can be selected.
- In the detail section, the manifest data is displayed, but is not editable.
- On the **Packages** grid, a **PRO Number** is a series of numbers used by carriers as a reference for freight movement. The term, PRO Number, is short for progressive number. This series of numbers is used as a tracking tool.

Shipping updates

Active SHP transactions are picked up from **WL Transaction Inquiry**. The line item and header information is updated in the **WL Entry Batch Shipping Report**, similar to these functions:

- **Sales Shipping Feedback Entry**
- **Transfer Shipping Feedback Entry**
- **VA Shipping Feedback Entry** when standard system orders, transfers, and VA work orders are shipped

Orders being processed through the system have a work-in-process status in **WL Transaction Inquiry**. Successful updates show with an inactive status.

Orders, warehouse transfers, and VA work orders can be processed concurrently with the **WL Entry Batch Shipping Report**. You must set up the system to process them at the same time and at the same interval. Your TWL administrator can set up a separate report for each function. This is so that processing occurs at different times to coincide with the frequency and schedules of the related activities.

For example, your warehouse may process customer orders frequently throughout the day. However, it only processes warehouse transfers when the delivery truck arrives to pick up shipments. It only processes VA work orders on a weekly basis. The data being communicated from TWL is set up so that duplicate data is not transmitted more than once if three reports are running simultaneously.

If changes were made to an order while the order was being picked, the order is changed in the **WL Entry Batch Shipping Report** to reflect the changes. For example, some of the line item quantity may have been returned to stock or to unavailable. If so, then the order and the system records are updated in the **WL Entry Batch Shipping Report**.

A full order update transaction is sent to complete the shipping process. This action updates the full order if the order is shipped, or if sent to backorder for products that were not shipped. The order header is updated with the shipped date, freight add-ons, ship via, and number of packages shipped.

Because the order has been loaded on the truck, changes cannot be made to the line items. Although, addons, at the header level, can be adjusted. Addons can be manually changed in the system, after a TWL order has been shipped. If so, then the charges on the manifest are different from the invoice charges. Labor lines can be manually added to the order, after a TWL order has been shipped. This labor might be added to cover assistance with packaging or shipping. Journals are opened during the update process for sales orders, transfers, and VA work orders as needed. Transactions posted to these journals are closed per function, so postings are not crossed. If two journals are opened for a single user, then the two journals could potentially cause duplicate postings and transmission errors. We recommend that you set up two different stored reports for two different operators. This is to process the customer orders and warehouse transfers at staggered times during the day to avoid a processing overlap.

Be aware of when a **WL Entry Batch Receiving Report** is scheduled as a stored report. This is so that you can stagger the processing times enabling a report to finish processing before another report is started.

The operators you assign to the stored reports must be unique and cannot be assigned to any other processing function. For example, to process customer orders, you set up a stored report for operator DEF with specific option settings. This table shows the option settings:

Option	Value
1. Sales Order Entry Shipping Process?	Yes
2. Warehouse Transfer Process?	No
3. Value Add Shipping Process?	No
4. Check for Locks Prior to Processing?	Yes
5. Run OEERS on OE Non Stock Lines?	No

Then, for example, to process transfers, you set up a stored report for operator JKL with different option settings. Ensure you set up this stored report so that it does not begin processing until the stored report for customer orders is finished. This table shows the option settings:

Option	Value
1. Sales Order Entry Shipping Process?	No
2. Warehouse Transfer Process?	Yes
3. Value Add Shipping Process?	No
4. Check for Locks Prior to Processing?	Yes
5. Run OEERS on OE Non Stock Lines?	No

Then, for example, to process VA work orders, you set up a stored report for operator UVW with different option settings. Be sure to set up this stored report so that it does not begin processing until the stored report for orders and transfers is finished. This table shows the option settings:

Option	Value
1. Sales Order Entry Shipping Process?	No

Option	Value
2. Warehouse Transfer Process?	No
3. Value Add Shipping Process?	Yes
4. Check for Locks Prior to Processing?	Yes
5. Run OEERS on OE Non Stock Lines?	No

The same shipping updates that the **Sales Shipping Feedback Entry** and **Transfer Shipping Feedback Entry** functions perform are initiated in the **WL Entry Batch Shipping Report**. This update includes closing the shipping journal and updating General Ledger and Inventory Control. If processing stops before the journal is successfully closed, you must manually close the journal. The journals are not opened by the **WL Entry Batch Shipping Report**; other functions that open the journals are launched. The report output provides order information and relevant error messages.

Order shipping

If you are using an external shipping interface to ship TWL orders, you are not required to process the orders through the **WL Entry Batch Shipping Report**. This is true unless you are processing zero ship orders.

If you are using TWL to ship orders, then generate the **WL Entry Batch Shipping Report**. The shipping synchronizes with the system when a full order is ready for uploading, and the order is set to Shipped stage. The order header is updated with the shipped date, freight addons, and ship via.

When all lines on an order have a quantity shipped of zero, the order is converted to Stage 1 (Ordered). These orders are put on credit hold. The credit hold is based on the setting for the **Approve Type for Zero Shipped Orders Placed on Hold** option, in **SA Administration-Administrator Options-Logistics-WL Options**. An inventory out-of-balance condition occurs in the warehouse, and a cycle count is created. The cycle count gives the order the chance to be reprinted, downloaded, and fulfilled. An order may contain both zero shipped quantities and shipped quantities. If so, then the zero shipped quantities are moved to a back order to facilitate the filled line items.

Split release backorders

Backorders are created when the quantity available to fill a line item is insufficient for the quantity ordered. You can create backorders for these orders.

You can launch the **Sales Shipping Feedback Split To Backorder Entry** function from the **WL Entry Batch Shipping Report**. This action fills a line item with a nonstock product that is in inventory and backorders the remaining quantity automatically. The backorder is filled during the **Sales Entry Processing Back Order Fill Report** when the nonstock product is received into the warehouse.

Customer returns

Customer returns in the system have a default status of Return Hold in TWL. This is based on the **Approve Type For Customer Returns Placed On Hold** option in **SA Administration-Administrator Options-Logistics-WL Options**. After inspection, the products can be put back in stock, returned to the vendor, or disposed of. The default status 'H' requires a stock change, which can be an unavailable or available status. The stock adjustment is processed through **WL Entry Batch Adjust Inventory Report** to adjust the system for the unavailable movement of stock.

A build-on-demand kit can only be returned to stock from **Sales Order Entry**. Return Merchandise (RM) purchase orders are processed through TWL in the same manner as customer orders.

Transfer shipping

The order is set to shipped stage when the **WL Entry Batch Shipping Report**is run. Backordering is also handled. The shipped date, package count, ship via, and actual freight are updated. Warehouse transfer lines that are zero shipped change the transfer back to Stage 1 (Ordered) and the lines are put on hold.

Your TWL administrator can use the **WT Order Exception Report** and set the **Not Approved Line Items** option to **Yes** to identify the zero shipped lines. If the lines are approved, you can reprint the transfer and resend the order to TWL. Warehouse transfers that are zero shipped are processed in the same manner that **Sales Order Entry** orders are handled. This graphic shows the General Ledger entries that are made for the transfer:

	DR	CR
In Transit	$1200.00	
Inventory		$1200.00

When a transfer is shipped from a TWL warehouse and an exception occurs, the **Transfer Exception Receipt Entry** function is used to resolve the exception. The **Transfer Exception Receipt Entry** exceptions are always adjusted in the shipping warehouse because the receiving warehouse has possession of the inventory and can verify the errors.

If a shipment is received short, then short-ship information is displayed in the **Transfer Exception Receipt Entry** for the shipping warehouse. A message is displayed: `WL Quantity Received < Shipped; Press Space Bar to Update (6513).`

This graphic shows the General Ledger entries that are created by the **Transfer Exception Receipt Entry**. It also shows that the **Product Warehouse Product Setup** In Transit quantity is adjusted

accordingly:

	DR	CR
Physical Adjustment	$400.00	
In Transit		$400.00

A stock adjustment, which is initiated from TWL, is the only type of transaction that is used for short shipments.

A **Transfer Exception Receipt Entry** cycle count request is created in TWL for the shipping warehouse. This action checks the quantity in the location where the transferred product was picked. The **Transfer Exception Receipt Entry** cycle count request is created because the receiving warehouse initiates the discrepancy. Use the TWL system to count the product with the discrepancy and to initiate a stock adjustment.

If there is no inventory in the location, a **Transfer Exception Receipt Entry** cycle count wave is also created, so that the empty location can be verified. Quantity in Distribution SX.e is adjusted when the stock adjustment is uploaded from TWL.

This graphic shows that General Ledger is adjusted when the stock adjustment is processed through the **WL Entry Batch Adjust Inventory Report**. It also shows that the **WL Entry Batch Adjust Inventory Report** creates the General Ledger entries for a shortage:

	DR	CR
Inventory	$400.00	
Physical Adjustment		$400.00

If the receipt is for a greater quantity than the shipment, then the over-receipt information is displayed in **Transfer Exception Receipt Entry**. A message is displayed: `WL Quantity Received > Shipped; Press Space Bar to Update (6024)`

This graphic shows the General Ledger entries created by the **Transfer Exception Receipt Entry**. It also shows that the **Product Warehouse Product Setup** In Transit quantity is adjusted accordingly:

	DR	CR
In Transit	$200.00	
Physical Adjustment		$200.00

A stock adjustment, initiated from TWL, is the only type of transaction that can be used for an overage. A cycle count request is synchronized from TWL to the shipping warehouse to check the quantity in the location from which the transferred product was picked. The cycle count request is synchronized because the receiving warehouse initiates the discrepancy.

The TWL warehouse is responsible for counting the product with the discrepancy and initiating a stock adjustment. The system is adjusted when the stock adjustment is synchronized from the TWL warehouse. This graphic shows the General Ledger is adjusted when the stock adjustment is processed through the **WL Entry Batch Adjust Inventory Report**. It also shows that the **WL Entry Batch Adjust Inventory Report** creates the General Ledger entries for an overage:

	DR	CR
Physical Adjustment	$200.00	
Inventory		$200.00

Value Add work orders

The materials that are required for the fabrication of the Value Add product must be shipped to your external service vendor in **VA Shipping Feedback Entry**. **VA Shipping Feedback Entry** is launched by the **WL Entry Batch Shipping Report**. When all components are shipped and the section is completed, or closed, the on hand quantity in **Product Maintain Balances Entry** is reduced. The quantity is reduced for the components listed in the **Inventory (IN)** section of the work order. The Work in Process General Ledger account is updated for the value of the components and freight.

Maintaining a shipped order

Your TWL administrator can make minor changes to an order shipped in **Sales Shipping Feedback Entry**. For example, changing the freight. The changes made are not downloaded to TWL.

See the online Help for additional instruction about changing order information during shipping.

Your TWL administrator may be required to enter an authorization number to access the line items for a TWL order in Stage 2 (Picked). This depends on their level of authorization security.

1. Select **Sales > Entry > Shipping Feedback**.
2. Specify a customer number and TWL warehouse and click **Search**.
3. Drill down to an order line.
4. In the **Header** view, make changes in the **Shipping Information** section as needed.
5. In the **Line Items** view, as needed, make changes to specific line values, select the line, and click **Re-Reserve** or **Set Qty Ship to Zero**. You can drill down to the **Extended** section or the **Carton Label** section and make changes.

   Depending on the changes, messages are displayed to confirm or deny those changes. For example, if you change the quantity shipped, a message is displayed asking if you require physical count. You can click **No** to ignore a physical count of the product. Physical counts are controlled by TWL, so the system is not affected by counts.

The customer is invoiced for the quantity shipped, so ensure that the quantity is accurate. If you increased the quantity shipped, a message is displayed asking if the quantity ordered should be adjusted up to the quantity shipped.

6 After you have made all the changes, click **Update** or **Save**, depending on which view you are in.

Processing vendor return merchandise with manual release

If the **Hold PO/RM For Manual Release** option is selected in **SA Administration-Administrator Options-Logistics-WL Options**, use these steps to process a purchase order RM.

1 Select **Purchase > Entry > Purchase Order**.

The purchase order may have been entered by the buyer or by warehouse personnel, depending on your operation.

2 Enter a purchase order Return Merchandise (RM) order.

See the *Infor Distribution SX.e Total Warehouse Logistics User Guide for Managing Orders* for instruction on processing a vendor return.

3 Print the purchase order RM. The order is downloaded to TWL when the order is printed.

4 Select **TWL Outbound > Order Management > Order Drop Manager**, and drop the vendor return for picking.

5 Use the RF to pick, pack, and ship-verify the purchase order RM.

6 Select **Warehouse Logistics > Inquiry > Transactions**.

7 Review the receipts for the TWL warehouse with a status of vendor return. The transaction stays in **WL Transaction Inquiry** until you manually release the transaction after the customer return has been invoiced.

8 If an adjustment to the freight addons is required, access the purchase order RM in **Purchase Order Entry** and make the changes. Because the **WL Entry Batch Receiving Report** has not updated the order, the order is in Stage 2 (Printed).

9 While you are still in **WL Transaction Inquiry**, wait until the returned products are received from the customer and the customer RM has been invoiced. Then, select the **Returns PO** view to show the receipts with a status of vendor return.

10 Access the **Status** field and change the status of the transaction to **`Active`**.

11 Run the **WL Entry Batch Receiving Report** to update the system with the purchase order RM. An RCV type upload is created and the **WL Entry Batch Receiving Report** receives the purchase order.

Closing an open journal

The **WL Entry Batch Shipping Report** launches other functions that open journals. If a journal is not successfully closed, you must manually close the journal so that you can resume processing.

Caution: Because a journal has a direct effect on the General Ledger, use extreme caution when modifying this information.

1. Select **System Administrator > Setup > Journal**.
2. In the **Search** pane, specify the open journal number, or use **Advanced Search** to show the **Function** criteria.

   The **WL Entry Batch Shipping Report** is most likely the primary function. The function, **Transfer Shipping Feedback Entry**, that opened the journal, is the secondary function.
3. In **Function**, specify **`WTES`** and click **Search**.
4. In the grid, drill down the journal line.
5. Click **Edit**.
6. In **Required**, in the **Flags** section, select **`Closed`**.
7. Click **Save**.
8. Log out and log back into the system.
9. Select **Transfer > Entry > Shipping**. The function that contains the open journal is automatically displayed.
10. In the **WT#** field, specify the transfer number that corresponds to the journal listed on the message.

    If journals are open for **Sales Shipping Feedback Entry**, repeat these steps to close the **Sales Shipping Feedback Entry** journals.
11. In **Confirmation: Proceed with Final Update?**, click **`Yes`**.
12. Click **Save**. When you save, your journal is closed.

Manually updating the system with shipping information

The **WL Entry Batch Shipping Report** is usually set up as a stored report. However, the report can be run manually if orders must be processed before the next scheduled report time.

1. Select **Warehouse Logistics > Entry > WLE Reports > Entry Batch Shipping**.
2. Specify the report ranges. Specify a warehouse or order range to limit the qualifying orders. The warehouses are validated in **Product Warehouse Description Setup**.
3. Specify the report options.
   a. In **Order Entry Shipping Process?**, select **`Yes`** to pull all the active orders that have been transmitted to the system using TWL.

      The shipped quantity at the line and component levels, the serial/lot information, and totals to the order header are updated for active **Sales Order Entry** orders. This is similar to **Sales Shipping Feedback Entry**. If an error is found, the error can be monitored in the **WL Transaction Inquiry** function.

   b. In **Warehouse Transfer Process?**, select **`Yes`** to pull all the active warehouse transfers that have been transmitted to the system using TWL.

      The shipped quantity at the line level and totals to the transfer header are updated for active transfers, similar to **Transfer Shipping Feedback Entry**. However, the transfer must be ship-verified in TWL to change the inventory quantity to reflect the shipment.

c In **Value Add Shipping Process?**, select **Yes** to pull all the active VA work orders that have been transmitted to the system using TWL.

d In **Check for Locks Prior to Processing?**, select **Yes** to have the system check for locked records before processing the qualifying transactions.

e In **Run OEERS on OE Non Stock Lines?**, select **Yes**. If the quantity ordered on a nonstock line cannot be completely shipped and a backorder does not already exist, a backorder is created. You can then ship the quantity that is available and purchase the remaining quantity. When the remaining quantity is received, the **Sales Entry Processing Back Order Fill Report** allocates the receipt to the correct order.

If the quantity on the tied PO is received short, then a backorder is created and **Sales Shipping Feedback Split To Backorder Entry** backorder processing does not occur. A note prints on the report if **Sales Shipping Feedback Split To Backorder Entry** cannot be processed because of a backorder on a PO.

4 Run the report.

A summary of the total products processed print if the corresponding option is selected. This information is provided:

- Journal
- Number of orders and lines that were processed
- Number of orders with errors
- Number of components that were processed
- Number of serial/lots that were processed

The function totals are by warehouse.

The report exceptions are listed by function, and the print interval exceptions are printed at the end of the report.

Chapter 4: Kitting and fabrication

In TWL, 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, which 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.

Value Add (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 to a customer.

Note: If you use Infor Service Management to process assembly SROs, the products that are identified as SRO Assembly products on assembly orders in Distribution SX.e are not processed as kits or VA items. SRO Assembly product processing occurs in Service Management.

See the *Infor Distribution SX.e Integration Guide for Infor Service Management*.

Build-on-demand kit

Build-on-demand (BOD) kits do not exist in your inventory, even though the components exist in your inventory as separate SKUs. A system administrator identifies the item as a build-on-demand kit on the **Product Setup** record. A system administrator sets up the kit product and components in **KP Components Setup**.

Build-on-demand kit components are identified according to customer specifications and entered at the time the sales order is entered into **Sales Order Entry**. A BOD kit is not assembled until it is ordered by a customer and the pick ticket, which contains the components, is printed. The sales order, which contains the component list, is released to TWL. The order is dropped to the floor using the **Order Drop Manager** function. When the kit order is assembled and complete, the line items of the order are staged. The line items are then picked, packed, and shipped through the normal order processing flow.

Assembling a build-on-demand kit

A work order is created from **Sales Order Entry** when a customer orders a build-on-demand kit. After the work order is printed and dropped, use these instructions to pick the kit components.

1 From the RF **Main Menu**, select **Order Picking**.

2 Select **Pick Options**.
3 Use the **arrow** keys to select, for example, Wave, and press **Enter**.
4 A question is displayed: `View all waves?` Specify **`Yes`**.
5 Use the **arrow** keys to highlight an order with the prefix ‘w’ and press **Enter**.
6 A question is displayed: `Do you want to view all the zones?` Specify **`Yes`**.
7 Highlight the zone and aisle from which you are picking and press **Enter**.
8 Use the **arrow** keys to highlight a product, item, and press **Enter**.
9 Scan the location and item, specify the quantity picked, and scan the pallet or tote on which you are placing the item.
10 Continue picking components until all components have been picked.
11 When the **Order Picking Main Menu** is displayed, press **X** to access the RF **Main Menu**.
12 For a pick-to-tote warehouse, use the RF **Main Menu** and select **`Packing`**.
13 When the **Order Packing/Sortation Main Menu** is displayed, select **`Pack by Order`**.
14 In **Order Packing**, scan the carton, tote, and item you are packing. Specify the quantity packed.
15 Specify an SCM number, if appropriate.

Prebuilt kit

Work orders for prebuilt kits are created in **Sales Order Entry** and released to TWL when the order is printed. The work orders are listed in the **Order Drop Manager** function. This is where the work order can be dropped similar to a regular sales order or warehouse transfer. The work order number is prefixed with ‘w’ to distinguish the order from other order types. After the work order is dropped to the floor, kit assembly activities are created within the warehouse.

If the entire quantity on a work order cannot be built in TWL, a manager runs the **WL Entry Batch Receiving Report**. Then, the manager runs the **KP Work Order Center Entry** function, and receives the quantity that was built. When the **KP Entry Recommended Work Orders Report** is run again, a back order for the remaining quantity is created. If a manager has to zero ship a work order in TWL, an exception is created in the **WL Entry Batch Receiving Report**. After the reason for the zero-shipped work order is corrected, the work order can be reprinted and released to TWL.

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

Prerequisite tasks

This section provides a brief summary of prerequisite tasks that enable TWL to process prebuilt kits. The correct setup of a prebuilt kit ensures these tasks or workflows have been followed:

- A warehouse zone specific to work center creation has been established. This action enables you to segregate work in process (WIP) inventory that is not available for picking or putaway.
- Departments have been setup as work centers and these centers have been assigned to the new warehouse zone.
- Employees have been assigned to the work center department so they can access and build the prebuilt kits.
- In **Product Setup**, products setup as prebuilt for KP or VA internal processing must be routed through a work center to create the product.
- In **Product Warehouse Product Setup-Warehouse Logistics**, the Kit Build Department determines where in TWL the finished product is to be built.
- A work order from the KP or VA Internal processing is dropped in **Order Drop Manager**. The work order is routed to the work center that is defined on the product. All employees with access to that work center can process the work order.

Product and work center setup

When TWL is implemented for your company, item records are set up in the system with these setup functions:

- **Product Setup**
- **Product Catalog Setup**
- **Product Warehouse Product Setup**
- **Product Warehouse Description Setup**

Item records are also known as product records. These item records are considered when planning the warehouse layout and locations. Additionally, a work center is set up for the TWL warehouse, and the Kit Build Department is associated with the product and warehouse.

Set up a kit product component as a stock product in **Product Setup** and in **Product Warehouse Product Setup** before you set up the kit in **KP Components Setup**. A prebuilt kit is assembled from a work order and is placed in inventory to be sold at a later date.

See the online Help for instructions on setting up a prebuilt or build-on-demand kit.

Origination of an order for a kit product

An order for a kit can originate in **Sales Order Entry**. The order is released to TWL when the order is printed. An order from a kit can also originate from a work order. Although work orders are usually created through the **KP Entry Recommended Work Orders Report** process, you can also manually enter work orders in **KP Work Order Center Entry**. When the work order is printed in the **KP Entry Print Work Orders Report**, the work order is released to TWL.

See the online Help for instructions on selling a kit and creating a work order.

Work order drop

When a work order is dropped from the **Order Drop Manager**, the components are reserved and 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. Whether a component is required is defined in **KP Components Setup**.

See the *Infor Distribution SX.e Total Warehouse Logistics User Guide for Managing Orders* for instructions on dropping a work order.

Tasks that are performed on the RF

Perform these tasks on the RF:

- Stage the components to move into the kit build department
- Receive the components in the kit build department
- Complete the work order
- Move the finished kits from the kit build department to a bin location in the warehouse, where they can be picked, packed, and shipped

Final update

Run the **WL Entry Batch Receiving Report** to update the system.

Staging kit components

When a work order is dropped to the floor, the order is routed to the **Work Center** function on the RF. Only employees that are assigned to a work center can process a prebuilt kit through the RF. When a work order is dropped, picks and inventory allocations are not created. Movement records are visible in **TWL Execution-Replenishment-View Pending** if you select the option, **Show Non-Standard Replenishments**, in the **Search** pane, for a work order. These replenishments or movements are processed in the work center. When the product is staged into the work center, the product is moved to a Work in Process inventory availability status.

1. In the RF, select **Work Center**.
2. Select **Staging Inventory**.
3. Specify source and destination zones. Or, press **Enter** through both fields to view all staging transactions.
4. Use the **arrow** keys to scroll through the list and select a location by pressing **Enter**.
5. Scan the location you are removing the component from.
6. The component may have a lot number. Use the **arrow** keys to scroll to the right to view the quantities and lot numbers before you select a pallet.
7. In the list of pallets, perform these tasks:
   a. Scan the item being removed from the location.
   b. Verify the unit of measure.
   c. Specify the quantity picked.
8. Scan the pallet you are placing the material on.
9. Scan or specify the staging location to which the components are moved.
10. A question is displayed: `The from location is the primary pick location. Do you want to move the picks?`

    Specify one of these options:

Option	Description
Yes	Specify to stage the next component and repeat the process until all components are moved into the work center
No	Specify if you are picking components from a primary location; otherwise, you are moving pending pick requests to the staging location

11 Repeat steps until all components are moved into the work center.

Receiving components

The material received in the kit build department contains a work in process status.

1 From the RF **Work Center Main Menu**, select **Receive Inventory**.
2 Scan the stage-in location the material was moved to from the storage locations.
3 If you are receiving by item, use the **arrow** keys to select a pallet. Scroll to the right to verify the lot number, if required.
4 Verify the item and quantity, and then specify **Yes**.
5 Scan the pallet that contains the material being received.
6 Repeat steps as needed to receive components into the kit build department.
7 Use the back button in the RF browser to return to the **Work Center Main Menu**.

Completing work orders

1 From the RF **Work Center Main Menu**, select **Create Work Ord.**.
2 If required, select a printer.
3 Use the **arrow** keys to scroll through the list and select a work order.
4 Review the line information by scrolling to the right. Press **Enter** to move the cursor to the **Destination Pallet** field.
5 Scan or specify the pallet you are placing the kits on.
6 Indicate whether to print labels.
7 Verify the quantity of the finished goods that are placed on the pallet scanned.
8 Press **F4** in **Line Information**.
9 A question is displayed: `Add Inventory In to This VA Order?`

Specify one of these options:

Option	Description
Yes	To return unused components to stock. Complete these steps: **a** Scan or specify the item you are returning to stock. **b** Specify the quantity. If you are returning a serial or lot item to stock, scan, or specify the numbers. **c** When you are finished, press **F4** from a blank line and leave the window.
No	To complete the work order.

10 A question is displayed: `Finished with this order?` Specify **Yes**.

11 Specify the parent kit's lot number, if required.

12 If you indicated that you must print labels in a previous step, then specify the number of labels to print.

13 If the **Specify Usage** screen is displayed, then specify a specific pallet, lot, and serial number used to assemble the work order. This screen enables you to keep the inventory and **WL Transaction Inquiry** more accurate.

Note: If the inventory counts match, the **Specify Usage** screen is not displayed.

14 If any of the components are serialized items, scan or specify the serial number. Rescan the number when prompted.

15 Select another work order, or use the back button in the RF browser to return to the **Work Center Main Menu**.

Releasing finished kits

Use these instructions to release the finished prebuilt kits from the kit build department to a stage-out or pick location. Releasing finished kits also changes the status of the inventory from work-in-process (WIP) to available for sale.

1 From the RF **Work Center Main Menu**, select **Rel. Work Order**.

2 The adjustment code releases the goods from work-in-process to available for sale. Accept the default or specify an adjustment code for releasing finished kits from the kit build department.

3 Scan or specify the outgoing pallet.

4 A question is displayed: `Release the pallet?` Specify **Yes**.

5 Confirm the stage-out location, for example, **wcout**. This default location value has been specified in the **TWL Administration-Department** master record. A put-away transaction is created for stock to be moved into inventory.

6 In **Work Center Releasing**, repeat steps as necessary to release additional kits, or use the back button in the RF browser to return to the **Work Center Main Menu**.

7 Use the stock put away function to move the kit into the warehouse.

When the **WL Entry Batch Receiving Report** runs, the system is synchronized. For serial and lot numbers of the items that were returned to stock, the TWL administrator performs any adjustments in **Product Extended Serial# Setup** and **Product Extended Lot# Setup**.

Value Add fabrication

A Value Add (VA) work order is typically created in **Sales Order Entry** when a customer orders a custom item that needs to be fabricated. At the time the sales order is entered, the customer can specify the components, instructions for fabricating the item, or any other details. A tie is made between the sales order and the VA work order to ensure the finished item fills the correct sales order.

VA services can include product knowledge and services, packaging, customer-required additions, or additional item refinement or finishing processes. For example, the **External (EX)** section, or phase, is for an external sub-contractor or vendor. That external sub-contractor may thread, drill, plate, paint, or assemble. Or that vendor may provide any other service that adds value to an item that changes the item to a finished item.

See the online Help for information about sections, stages, and creating VA products.

These VA sections contain information about an individual process or phase of the fabrication:

- The **Internal (IT)** section of a VA work order refers to improvements your warehouse makes to an item to add value to the item. Items that are fabricated internally are handled in the same manner as a prebuilt kit in the RF **Work Center** module.
- The **Inventory (IN)** components list the items required to assemble the VA item. Backorders that are created for an **Inventory (IN)** section update work orders.
- Use the **Inventory in (II)** section to receive excess components or materials that were not used in the **External (EX)** fabrication. The **Inventory in (II)** section reduces the work-in-process inventory costs on the work order.

A VA work order goes through stages as the order is processed. In addition to the stages, sections within the order have stages of their own. Order stages indicate the overall status of the order. Section stages indicate the status of the item being fabricated. A work order has these stages:

- Stage 0 - Entered, applicable to quote transactions only
- Stage 1 - Ordered
- Stage 3 - Printed
- Stage 5 - Received
- Stage 7 - Closed
- Stage 9 - Canceled

Sections, excluding specifications or instructions, have these stages:

- Stage 1 - Open. [Entered]
- Stage 3 - Printed
- Stage 5 - Shipped
- Stage 7 - Completed. That is, the order has been processed in **VA Shipping Feedback Entry**.
- Stage 8 - Paid. That is, an External Process Only.
- Stage 9 - Cancelled

A warning is displayed in **VA Shipping Feedback Entry** and **VA Entry Receipt of Inventory** if the order belongs to a TWL warehouse. You can process the order if the order is in stage 1.

External processing

When a VA order is printed, the order is downloaded to TWL to start downstream tasks. For an externally fabricated item, your warehouse picks and ships the components to an external service provider, along with specific instructions for completing the fabrication. You can create a tied purchase order to receive the components in the warehouse after the service vendor completes a section.

Backorders

The available quantity of the finished item may be less than the quantity ordered. An additional quantity of the finished item may yet to be fabricated. In this case, the RF operator can initiate the backorder by changing the **Qtot** field to **`Yes`**. The **Qtot** field is adjacent to the **Product** field on an **Inventory (IN)** component line item. To maintain data integrity, the quantity on backorder moves to a new section number, regardless of the status.

You must backorder if these scenarios occur:

- You can build some, but not all, of the VA item ordered by the customer
- A nonstock must be ordered, or if you are waiting to receive a component required, to build a finished good

For **External (EX)** sections, when the final section is performed by an external service vendor, you may initiate a backorder. Initiate this backorder if you can receive a portion of a purchase order. Initiate this backorder if you can complete the remaining portion of the finished goods upon receipt of the backorder.

Value-add purchase orders

The purchase order that is tied to the VA work order contains line items for the services performed by the vendor. The purchase order also contains the finished VA item. The purchase order can be printed from the **VA Entry Processing Pick Tickets Report** or from **VA Shipping Feedback Entry**.

When the item is finished by an external service vendor, you can receive the item in TWL using the RF after the PO is printed. The PO is updated to received stage when there are no more active or uncompleted sections. The work order contains a final section in completed stage. The stage of the VA work order advances to Stage 5-Received when the **WL Entry Batch Receiving Report** is generated and the VA work order is updated. Match the finished item to the purchase order that was created when the components were sent to the vendor.

Excess work-in-process components

After a VA item is fabricated, excess components, or surplus inventory, that were not used to build the VA item can exist. In**SA Administration-Administrator Options-Logistics-WL Options**, the value in the field, **WL Inventory-In SA Table Code Value Setup Value for Final External**, creates the **Inventory in (II)** section for receiving the excess components or surplus inventory .

When you receive the finished item from a service vendor, enter the surplus material on the PO that is tied to the VA work order. Adding the surplus material creates a new section on the tied VA work order and reduces the inventory used in the fabrication.

Process the PO in **Purchase Entry Receipt of Inventory** to finish the **Inventory in (II)** section and complete the **External (EX)** workflow.

Serial and lot number processing

You can process items that are controlled by serial and lot numbers for **External (EX)** sections on a VA work order. For **Inventory (IN)** sections of a VA work order that are processed in TWL, the **WL Entry Batch Shipping Report** performs these actions:

- Unallocates previously assigned serial and lot numbers
- Allocates serial and lot numbers according to TWL processing
- Edits correct allocation or shows a message

Running the **Purchase Entry Processing Print POs Report** prints the associated serial and lot numbers for VA work order **External (EX)** sections. For **Inventory in (II)** sections received against a purchase order, the **WL Entry Batch Receiving Report** processes serial and lots. You can view serial and lot detail for line item and section information from **VA Order Inquiry** and **VA Order Entry**. Lot numbers of the parent kit product update the system when **KP Work Order Center Entry** updates inventory and the General Ledger after the **WL Entry Batch Receiving Report** is run.

Internal processing

A VA work order with an **Internal (IT)** section is completed by your warehouse work center employees. **Inventory (IN)** line items for components follow the same processing route as a prebuilt kit for assembly in a kit build department.

After a VA item is fabricated, excess components, or surplus inventory, that were not used to build the VA item can exist. In**SA Administration-Administrator Options-Logistics-WL Options**, the value in the field, **WL Inventory-In SA Table Code Value Setup Value for Final Interna**, creates the **Inventory in (II)** section for receiving the excess components or surplus inventory. The **Inventory in (II)** section creates inventory records for excess components. Use standard put-away procedures for the returned inventory.

An **Inventory in (II)** section that contains nonstock inventory is displayed as an error in **WL Transaction Inquiry** because the cost for the nonstock linis is not tracked by TWL. After you inactivate the error, create a manual **VA Entry Receipt of Inventory** entry to finish the **Inventory in (II)** section.

Prerequisite tasks

This section provides a brief summary of prerequisite tasks that enable TWL to process value-add orders.

Section setup

When TWL is implemented for your company, section codes are set up in the system. Sections define the phases of a VA fabrication. This list shows the valid section types that are predefined in **SA Table Code Value Setup**:

- VA External Processes
- VA Inspection,
- VA Internal Process
- VA Inventory Components,

- VA Inventory Returned
- VA Specifications/Instructions.

Each valid type can be further defined to include the exact processes or phases that your company uses with each section type.

Item defaults in are set up in **VA Product Default Setup**. At a minimum, a VA work order includes an **Inventory (IN)** components section, and either an **External (EX)** or **Internal (IT)** section. These item types are used during the entry function to eliminate redundancy. The information set up in this function autopopulates the section and line item fields when you are creating a VA work order.

See the online Help for instructions on using these setups.

Work order creation

You can manually create a Value Add work order in **VA Order Entry**. You can also create work orders from **Sales Order Entry** or through a replenishment function, such as the **VA Entry Recommended Replenishment Action Report**.

See the online Help for instructions on creating and maintaining a value-add order.

VA work order release

The **Inventory (IN)** sections are released to TWL for picking and shipping to the vendor when these reports are run:

- **VA Entry Processing Internal Value Add Print Report**
- **VA Entry Processing Pick Tickets Report**

The order can then be dropped in **Order Drop Manager**.

See the online Help for instructions on running VA reports.

When you print a work order for an **External (EX)** VA section, the order is controlled by TWL. Pick and move the components to the work center stage-out location and ship them to an external service vendor. The item is then sent back to you for sale or additional processing in your warehouse.

In **Order Drop Manager**, verify and assign a valid carrier to the VA order to facilitate processing. If a carrier is not assigned to the order, then the components cannot be shipped to the external vendor for processing.

When processing the section with the RF, you can pick the order using normal steps. A message is displayed on the**Pick From Label** screen. The message directs you to the stage-out location that is specified on the work center department record. Ship the components to the service vendor. The **WL Entry Batch Shipping Report** processes the SHP records. The processing of SHP records updates the **Inventory (IN)** section to 'Complete' and moves the inventory cost to work-in-process. After the fabrication is complete, the service vendor sends the finished VA item to you and you can receive the item.

Shipping VA components to a service vendor

The RF Ship Verification step is required to ship components to an external service provider.

1. From the RF **Main Menu**, select **Shipping**.
2. Select **Ship Verification**.
3. Scan or specify the dock ID for the carrier.
4. Scan the carton or pallet ID.
5. Specify the weight of the carton or pallet.
6. Specify the freight cost, if applicable.
7. Repeat steps as necessary for all packages you are shipping.
8. Press **F4** from a blank line when you are finished shipping components to the vendor.

When the **WL Entry Batch Shipping Report** runs, the system is synchronized.

Receiving the finished external VA section

After your external service vendor completes the fabricating instructions, print the purchase order in the **Purchase Entry Processing Print POs Report**. Any surplus components can be added on a section type as **Inventory in (II)**. Print the purchase order that was created for the external process.

1. From the RF **Main Menu**, select **Receiving**.
2. Scan the dock ID where receiving is to be performed, and press **Enter**.
3. From the **Stock Receipt Main Menu**, select **Receiving**.
4. From the **Receipt Inquiry** window, select **Purchase Order**.
5. Scan or specify a partial PO number that is tied to the VA work order, and specify **`Yes`** to view the list of POs.
6. Select a PO that is tied to a VA work order from the list by scrolling down and pressing **Enter**.
7. A message is displayed: `This PO is tied to a VA order! Please add any (Inventory In) prior to closing the RT.` Press **Enter**.
8. In the **Line Item Selection** screen, scan the item. If you are returning components to stock, specify the item name and add the item to the PO.
9. Specify the quantity received.
10. For the **Direct Receipt** field, indicate whether to move the inventory directly to a storage location.
11. Specify the status of the receipt.
12. Scan the pallet ID number or accept the default direct receipt pallet, and press **Enter**.
13. In **Labels?**, specify **`Yes`** to print item labels.
14. In the **How Many Labels** prompt, specify the number of item labels to print.
15. Select a printer from the list.

    You can select a different label printer by pressing **Esc+L** (UNIX) or **Alt+L** (Windows).
16. If the pallet is full, in the **Skid Full** field, specify **`Yes`**.
17. If you performed a direct receipt, continue to the next screen to put away the receipt.

Repeat steps as necessary to receive additional VA items. If you are receiving **Inventory in (II)**, continue to the next step.

18 In the **Line Item Selection** screen, scan or specify the surplus items.

19 In **Add/Replacement**, select **Add**.

20 Specify **Yes** to add the item.

21 In **Line Item Receiving**, repeat steps as necessary to continue receiving inventory.

22 When you are finished, in **Line Item Selection**, press **F4** from a blank line.

23 If you are finished with the receipt, select **Yes** to close the RT. To continue receiving items, select **No**.

24 Generate the **WL Entry Batch Receiving Report** to update Distribution SX.e.

When the **WL Entry Batch Receiving Report** runs, the system is synchronized.

Receiving inventory into a VA order

1 From the RF **Work Center** main menu, select **Receive Inventory**.

2 Select **Create Work Ord.**

3 In the **Create Work Ord. - Work Center** window, use the **arrow** keys to scroll through the list and select a work order.

4 Review the line information by scrolling to the right. Press **Enter** to move the cursor to the **Destination Pallet** field.

You can create a note for the work order by pressing **Alt+N**. To change the required and print defaults, press **Enter**. To access the **Prt** field, press **Tab**, and to clear the field, press the **spacebar**.

5 Scan or specify the pallet you are placing the kits on.

6 Indicate whether to print labels.

7 Verify the quantity of the finished goods that were placed on the pallet scanned.

8 Press **F4**.

9 A message is displayed: `Add Inventory In to This VA Order?` Specify **Yes**.

10 In VA **Inventory In**, scan or specify the item. If the item does not have an **TWL Configuration-Item** master record, a message is displayed: `Add This Item as a Non-Stock?`.

11 Specify the quantity.

12 Repeat steps as necessary to return items to inventory.

13 When you are finished, press **Enter** from a blank line.

14 A message is displayed: `Finished with this order?` Specify **Yes**.

15 For items with serial numbers, you are prompted to scan, and rescan the serial numbers that were received.

16 Create inventory records and make inventory adjustments for the inventory added.

17 Select another work order, or press **F4** from a blank line to return to the **Work Center** main menu.

Using the RF to inquire on containers

The Work Center menu provides a container inquiry that you can use to identify the wave, order, customer number, status, description, and contents of the container.

1. From the RF **Main Menu**, select **Work Center**.
2. In the **Work Center Main Menu**, select **Container Inquiry**.
3. Scan or specify the container ID to inquire on.
4. View the wave, order, customer number, status, description, and contents of the container.
5. Press the **arrow** keys to view additional information on the browse screen.
6. When you are finished with your inquiry, press **F4** to return to the **Work Center Main Menu** to make another selection.

Appendix A: Troubleshooting

This section provides answers to some common questions you may encounter when working with picking, packing, shipping, and kitting tasks in TWL. Additional information is available by contacting Infor Support.

Distinguish whether a dock is set up for carrier arrival or departure

Cause: In the RF **Carrier Arrival/Departure** screen, likely you pressed **Enter** after the **Dock Information** autofilled with an already loaded carrier. Thus, you are telling the system you want the carrier to depart.

Solution: You can enter the dock to see what carrier is loaded, but do not press **Enter** until the carrier is departing. Instead, press **F4** to leave the screen. Only press **Enter** when you want the carrier to depart. If the Dock Information does not autofill after inputting the dock, then there is no carrier loaded to the dock. You must enter the carrier information, and then press **Enter** to load the carrier.

See Opening a shipping dock on page 48.

Appendix B: 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.

Picking 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: 1016

Name
Cart Picking

Parameter Type
Picking

Level
Global

Value
- Yes: Cart picking is used. [default]
- No: Cart picking is not used.

Description
Cart Picking
Does this warehouse utilize carts for picking?
Cart picking allows for a picker to pick multiple orders at one time into more than one tote. The rules on tote separation is defined through system parameter 1054, Receiving, Tote Validation.
A cart is defined as a multiple pallet Alternative Location. Alternate Locations are found under the System Setup menu. Each pallet location may be filled with a tote used for picking. A cart may not have more pallets/totes on it than the number of pallets specified in the Alternate Location window. Each tote on the cart may be used for distinct orders.

Parameter ID: 1019

Name
Hip Printers

Parameter Type
Picking

Level
Global

Value
- No: You are not using a hip printer. [default]
- Code Courier: You are using this type of hip printer.
- ONeil: You are using this type of hip printer.
- Non-Legacy Printer: You are using a supported external application, such as Enterprise Printing Platform, to print labels.

Description
Hip Printers
Are hip printers used during picking?
Hip printers attach to the RF unit and print item labels after a pick occurs. If you use hip printers, select the brand. If not, accept the default.
A 'Non-Legacy Printer' means you are using a supported external application to print labels.

Parameter ID: 1050

Name
Picking Options

Parameter Type
Picking

Level
Global

Value
- Prompt picker
- Pick Short [default]Picking
- Leave Open

Description
Picking Options
When the picker picks short, how does the system respond?
There are three options. The options will affect how the order will behave. When a picker finishes picking an order before filling all available lines, the order is picked short. When a pick quantity is lowered from the original quantity, the unfilled amount is closed out from the order.
For all the examples below, use the following:
A pick is created for 10 of item ABC. When the picker performs the pick, he/she finds only 6. There is no other good stock in the warehouse,
1) Pick short - Close the pick and allow the picker to proceed. [default]
Example:
The 6 items are picked. The order is shipped short 4 units. After the inventory is released from Quality Assurance Hold, the host may send a backorder for the remaining items.
2) Leave Pick open - The order must be filled. No partial quantities are allowed.
Example:
The 6 items are picked. The remaining 4 items are left open and unfinished until the release of Quality Assurance Hold inventory.
3) Prompt Picker - The picker will determine whether to close the pick or not.
Example:
The 6 items are picked. The picker is then prompted, do you want to close the pick.
If the picker chooses to leave the pick open then:
The remaining 4 items are left open and unfinished until the release of Quality Assurance Hold inventory.
If the picker chooses to close the pick then:
The order is shipped short 4 units. After the inventory is released from Quality Assurance Hold, the host may send a backorder for the remaining items.

Parameter ID: 1054

Name
Tote Validation

Parameter Type
Picking

Level
Warehouse

Value
- No Validation
- Ship Address and Carrier
- Carrier and Service
- Order and Order Suffix
- Customer Code and Carrier [default]

Description
Tote Validation
When picking to tote, what level of validation do you want?
The validation is necessary for keeping specific order information separate from other orders.
1) No Validation
The packer can put any item into the tote. All orders can be mixed together in a pallet.
2) Ship Address and Carrier
The packer can only put inventory specified for the same ship name, address, and carrier into the tote.
3) Carrier and Service
The packer can only put inventory destined to go out the same carrier and carrier service into the same tote.
4) Order and Order Suffix
The packer can only put inventory for only one order into the tote.
5) Customer Code and Carrier
The customer identification code, shown on the Order Header window, and the carrier must be the same

Parameter ID: 1057

Name
Suggest Carton/Tote

Parameter Type
Picking

Level
Warehouse

Value
- No: A carton or tote will not be suggested. [default]
- Yes: A carton or tote will be suggested.

Description
Suggest Carton/Tote
When picking an order, do you want a suggested carton or tote?
The system will suggest the last carton or tote used by the picker. The suggested destination is based from transactions. The transactions reflect the differentiating of multiple orders, multiple pickers, multiple cartons, and multiple totes to be utilized, without overlapping.
Overlapping is when picker A is suggested a carton picker B is working on. Picker A would have to locate the carton Picker B was working on. The system will not suggest the same destination for Picker A and Picker B.

Parameter ID: 1060

Name
Carton Validation

Parameter Type
Picking

Level
Warehouse

Value
- Minimal Validation
- Ship Address and Carrier [default]
- Carrier and Service
- Order and Order Suffix
- Customer Code and Carrier

Description
Carton Validation
When picking to carton or picking to tote, what level of validation do you want?
The validation is necessary for keeping specific orders separate from other orders
1) Minimal Validation
Usually, the packer may put any item into the carton. All orders may be mixed together in the carton as long as the carriers follow the same pack and ship processes.
2) Ship Address and Carrier
The packer can only put inventory specified for the same ship name, address, and carrier into the carton.
3) Carrier and Service
The packer can only put inventory destined to go out the same carrier and carrier service into the same carton.
4) Order and Order Suffix
The packer can only put inventory for only one order into the carton.
5) Customer Code and Carrier
The customer identification code, shown on the Order Header window, and the carrier must be the same.

Parameter ID: 1063

Name
Picking Pallet Options

Parameter Type
Picking

Level
Global

Value
- Show Pallet [default]
- Select Pallet

Description
Picking Pallet Options
When the picker proceeds to a location and is to pick from a pallet, does the system guide the user to the available pallets, or does the picker tell which pallet they are picking from?
Show Pallet
The Show Pallet option shows the picker all of the pallets that the item is found on at that location. The picker will then choose which pallet they are picking from. If there is only one pallet at the location, the picker will be shown that pallet.
Select Pallet
With the Select Pallet option, the picker will scan the pallet with out any system assistance.
No matter which option is selected, the pallet quantity and item status will always be verified during the pick.

Parameter ID: 1067

Name
Cart Picking Type

Parameter Type
Picking

Level
Global

Value
- Prompt User [default]
- Cart Bins
- Associate Totes

Description
Cart Picking Type
A cart can be configured in a couple of ways. The system can be configured to automatic configuration or prompt the user. A cart can have totes associated to it or a cart can have default bins or slots.
Cart Bins

A cart bin is a dedicated portion of a cart. The cart bin can be a cell, level, or any other area. The cart bin is used to store all picks for an order. After an order is completely picked to a cart bin, the order can be packed from the cart bin.
Associate Totes
The user must associate totes to each cart bin. The totes can be removed from the cart after picking is complete for packing.
Prompt User
Ask the user which one they are using.

Parameter ID: 1068

Name
Truck Pallets

Parameter Type
Picking

Level
Global

Value
- Yes: Truck pallets are used for picking. [default]
- No: Truck pallets are not used for picking.

Description
A truck pallet is a pallet used for shipping. When picking to a truck pallet, the picks are automatically prepared for shipping on that pallet. To ship all the inventory on the pallet, only the pallet has to be scanned.

Parameter ID: 1075

Name
Kit Quantity Posting

Parameter Type
Picking

Level
Global

Value
- Round Down Kit Quantity [default]
- Exact Kit Quantity

Description
This parameter is used to determine whether to update a kit in complete units or as a fractional value. When a kit is processed during the picking process, the kit header is updated as the sub-components are picked. After the complete kit is constructed, the kit quantity is updated. The sub-component that limits the number of full kits to be assembled is the limiting factor and this value will determine the number of full kits that can be created.
Example:

Kit ABC (20 kits to be processed, and one full kit consists of (1)A, (1)B, and (5)C).

Sub-component	Needed	On-hand
A	20	100
B	20	90
C	100	90

Item C is the limiting factor. With item C you can only construct 18 ABC kits with the limited availability of C (90 / 5 = 18).
The options are Round Down Kit Quantity or Exact Kit Quantity.
Round Down Kit Quantity
The kit quantity is only updated when a full kit is assembled.
Exact Kit Quantity
Allows fractional kits to be assembled.

Parameter ID: 1080

Name
Truck Pallet Validation

Parameter Type
Picking

Level
Global

Value
- No Validation
- Ship Address and Carrier [default]
- Carrier and Service
- Order and Order Suffix
- Customer Code and Carrier

Description
Truck Pallet Validation
When picking to a truck shipping pallet, what level of validation do you want?
The validation is necessary for keeping specific orders separate from other orders.
1) No Validation
The packer may put any item on the pallet. All orders may be mixed together on the pallet.
2) Ship address and Carrier
The packer may only put inventory specified for the same ship name, address, and carrier on the pallet.
3) Carrier and Service
The packer may only put inventory destined to go out the same carrier and carrier service on the same pallet.
4) Order and Order Suffix
The packer may only put inventory for only one order on the pallet.
5) Customer Code and Carrier

The customer identification code, shown on the Order Header window, and the carrier must be the same.

Parameter ID: 1083

Name
Work Order Prompt

Parameter Type
Picking

Level
Global

Value
- No
- Yes [default]

Description
Work Order Prompt
When picking a work order, do you want to have a message tell the user this is a work order?

Parameter ID: 1084

Name
Assume Item

Parameter Type
Picking

Level
Global

Value
- No: The system requires the operator to scan the item, even if there is only one item in the location. [default]
- Yes: The system will not require the operator to scan the item if the location only contains one item.

Description
Assume Item
When the user is picking at a specified location. If only one item exists at the location, can the system assume the item number? This system parameter will skip the scanning of the item, if the location only contains one item.
The assume item parameter is added to facilitate the picking process. The picker will have fewer scans to perform the pick. The trade off is the user can have the wrong item.

Parameter ID: 1086

Name
Picking Quantity

Parameter Type
Picking

Level
Global

Value
- Do not pre-fill [default]
- Pre-fill to 1
- Pre-fill to pick quantity

Description
Picking Quantity
The Picking Quantity system parameter is used to determine how the picking screen should default a pick quantity. The pick quantity is the amount of inventory reserved for an order, broken down into logical units.
The options are
Do not pre-fill.
Always default to zero.
Pre-fill to 1.
Always default to one.
Pre-fill to pick quantity.
Default to the requested quantity in the pick.

Parameter ID: 1099

Name
Suggest Carton – Advanced

Parameter Type
Picking

Level
Global

Value
- No [default]
- Yes: Carton suggestion will depend on parameter 1060.

Description
This parameter will enable the system to suggest the last carton that the picker used, even if it was for a different order.
The validation criteria defined in parameter 1060 will be applied when suggesting the carton.
Enable this functionality?

Parameter ID: 2022

Name
Emergency Order Picking

Parameter Type
Picking

Level
Global

Value
- No [default]
- Yes: Emergency orders are displayed first.

Description
Should emergency orders be given priority above all other orders?
This will force the picking module into a sort mode where all emergency orders are displayed first. None of the standard picking screens will be accessible until all emergency orders are picked.

Parameter ID: 2032

Name
Pick from CrossDock

Parameter Type
Picking

Level
Warehouse

Value
- Yes
- No [default]

Description
Pick from CrossDock Pallets
Parameter to control the Picking of Items from the Dock when the Pallet is bound for a Cross Docking Warehouse Zone.
This allows the users to set Pick From Dock equal to NO for normal Receipt/Put-Away Items, but still let people Pick Goods from the Dock for Cross Dock Items.
Enable Pick from Cross Dock Pallets?
NO - Normal Pick-From-Dock Parameter setting Parameter
YES - Always Pick From Dock if Cross Dock Pallet Dock Pallet

Parameter ID: 7000

Name
Multiple UOM During Picking

Parameter Type
Picking

Level
Warehouse

Value
- No [default]
- Yes

Description
Multiple UOM During Picking
In Order Picking - Pick From Label, can picking be done in a Unit of Measure other than EACH?
If YES, then the Pick UOM will default to the Selling UOM as entered in SX.e.
The Picker can select from any valid Unit of Measure that has been defined in SX.e.
Select if Picking Multi-UOM can be done:
No: No UOM Entry, Always EACH
Yes: Pick by Valid Item. UOMs Allowed

Parameter ID: 7001

Name
Ship Complete Pick Short Dialog

Parameter Type
Picking

Level
Warehouse

Value
1 Open (no dialog)
2 Line (no dialog)
3 Line and Order (no dialog)
4 Open/Line/Line and Order
5 Line/Line and Order [default]
6 Line and Order (no dialog)

Description
Ship Complete Pick Short Dialog
When attempting to pick short on a ship complete order, what options does the picker have for placing the lines or order on hold?
There are three options:
Open - The line is left open and is available for picking.
Line - The line is placed on hold and cannot be picked until it is released.
Line and Order - The line and the whole order is placed on hold. No lines on the order can be picked until the order is released from hold and the line must also be released from hold before it can be picked.
Options 1, 2, and 6, automatically perform the action without prompting the picker. Options 3, 4, and 5 give the user a combination of choices.

Parameter ID: 7002

Name
Review Zero Ships

Parameter Type
Picking

Level
Warehouse

Value
- Yes
- No [default]

Description
Review Zero Ships
Do you want to review zero shipped orders before they go back to SX.e? Thus, giving you the option to fix inventory discrepancies and redrop the order.
An order can become zero shipped when a total quantity of zero is shipped for an order, either by dropping when there is no inventory available in TWL or by actually picking zero and saying no to pick more.
- NO - Do not review zero ships before they are sent up to SX.e.
- YES - Review Zero Ships in the Order Drop Manager before they go back up to SX.e.

Parameter ID: 7003

Name
Rush Order Notify

Parameter Type
Picking

Level
Global

Value
Specify a numeric value in seconds. [default=0]

Description
Enter the minimum time interval (in seconds) to use when notifying RF users of the existence of rush orders.
If the interval is set to zero, Rush Order Notify will be inactive.

Parameter ID: 7005

Name
SCM Label Printing

Parameter Type
Picking

Level
Warehouse

Value
- Auto
- Employee
- Manual [default]

Description
SCM Label Printing
After Creation of a New Carton, should SCM Labels be Automatically Printed, Batch Printed by Employee, or run as a manual print from the Shipping SCM Menu?
If Auto Printing then SCM Label will print to the Zebra Printer defined in Carrier Maintenance.
If By Employee, then SCMs will print from "Create SCM Label" by entering Employee Id.
If Manual Printing then no SCM data will be collected during the packing process, but labels can be printed manually using the "Create SCM Label".

Parameter ID: 7006

Name
Allow RF Sorting of Waves/Orders

Parameter Type
Picking

Level
Global

Value
- NO
- YES [default]

Description
Do you want to allow employees to sort the picking Waves and Orders in the TWL RF Picking Module in the order they specify?
(Examples: carrier, shipto, route)
Only employees assigned the proper security to allow pick sorting will be prompted in the picking module.
All other employees will use the standard methodology to sort the pick records.

Parameter ID: 7007

Name
RF Pick Consolidation

Parameter Type
Picking

Level
Global

Value
- Disabled: Don't allow [default]
- Enabled: Default is Yes
- Enabled: Default is No

Description
RF Pick Consolidation
If enabled, then during RF picking of waves, orders, or zones the picks will be consolidated based on these rules.
Pick records are consolidated on the RF gun when picking by wave, order, or zone.
Pick records will only be consolidated if they are for the same item, in the same bin, and have the same UOM!
PICK TO PACK Warehouse & Ship Going Pallet Picking:
Pick records must meet carton validation rules assigned by parameter 1060 in order to be consolidated.
PICK TO TOTE Warehouse:
Pick records must meet tote validation rules assigned by parameter 1054 in order to be consolidated.

Parameter ID: 7008

Name
Order Notes

Parameter Type
Picking

Level
Global

Value
Specify one or more of these values: O,C,L,P [default]

Description
Order Notes Display
Which Order notes do you want to display during Picking?
O - Order (header) Notes
C - Customer Notes
L - Line Notes
P - Product Notes
Enter selection in a comma-delimited list.
For example: To see all notes enter
O,C,L,P

Parameter ID: 7009

Name
Warehouse Transfer Notes

Parameter Type
Picking

Level
Global

Value
Specify one or more of these values: O, L, P [default]

Description
Warehouse Transfer Notes Display
Which warehouse Transfer notes do you want to display during Picking?
O - Order (header) Notes
L - Line Notes
P - Product Notes
Enter selection in a comma-delimited list.
For example: To see all notes enter
O,L,P

Parameter ID: 7010

Name
Vendor Return Notes

Parameter Type
Picking

Level
Global

Value
Specify one or more of these values: O, L, P [default]

Description
Vendor Return Notes Display
Which Vendor Return notes do you want to display during Picking?
O - Order (header) Notes
L - Line Notes
P - Product Notes
Enter selection in a comma-delimited list.
For example: To see all notes enter
O,L,P

Parameter ID: 7011

Name
RF Order Pick/Pack Confirmation

Parameter Type
Picking

Level
Warehouse

Value
- No: Standard functionality. [default]
- Yes: Enables the order confirmation screen.

Description
This parameter will enable the TWL RF order confirmation screen.
If you are a pick to tote warehouse you will be notified when the order is fully picked.
If you are a pick to pack warehouse you will be notified when the order is fully packed.
Enable this functionality?

Parameter ID: 7012

Name
Alt Whse Order Notify

Parameter Type
Picking

Level
Global

Value
Specify a numeric value in seconds. [default=0]

Description
Enter the minimum time interval (in seconds) to use when notifying RF users of the existence of orders in Alternate Warehouses.
If the interval is set to zero, Alt Whse Order Notify will be inactive.

Parameter ID: 7013

Name
Counter Sales Over Pick Quantity

Parameter Type
Picking

Level
Warehouse

Value
- No: Do not allow [default]
- Yes: Allow

Description
Allow Counter Sales to Over Pick the Quantity?
Should the RF operator executing a pick against a counter sales order (Class = CS) be allowed to pick more than was entered?
The Counter Sales Order in Infor ERP will have already tendered the quantity entered to pick.
Your Warehouse and Item Level Settings Must Allow Over Picking (Force Ship) to Use This Setting.

Packing 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:1051

Name
Packing Option

Parameter Type
Packing

Level
Warehouse

Value
- Tote to Cartons
- Cartons from Totes [default]
- Quick Scan

Description
Packing Options
The packing options are presented to help optimize the packers work. There are three options for packing. The differences in the screens is in the order of the scanning, and the assumption of pick size. The options are Carton from Totes, Totes to Carton, Quick Scan packing.
Carton from Totes
The Carton from totes option allows the packer to quickly pack a carton from many totes. This feature should be used for warehouse which pick many totes per order. The packer will be asked to scan a Carton, then all the totes which will be used.
Tote to Cartons
The Tote to Cartons option allows the packer to quickly pack many cartons from one tote. This feature should be used for warehouses which pick large orders to one tote, or one orders to a tote. The packer will be asked to scan a Tote, then all the cartons which will be used.
Quick Scan
The Quick Scan option allows the packer to quickly pack many cartons from one tote. This feature should be used primarily when putting a high quantity of goods into one carton. The quantity is assumed to be one.

Parameter ID:1052

Name
Config Packing Option

Parameter Type
Packing

Level
Warehouse

Value
- Tote to Cartons [default]
- Carton from Totes
- Quick Scan

Description
Packing Options
The packing options are presented to help optimize the packers work. There are three options for packing. The differences in the screens is in the order of the scanning, and the assumption of pick size. The options are Carton from Totes, Totes to Carton, Quick Scan packing.
Carton from Totes
The Carton from totes option allows the packer to quickly pack a carton from many totes. This feature should be used for warehouse which pick many totes per order. The packer will be asked to scan a Carton, then all the totes which will be used.
Tote to Cartons
The Tote to Cartons option allows the packer to quickly pack many cartons from one tote. This feature should be used for warehouses which pick large orders to one tote, or one order to a tote. The packer will be asked to scan a Tote, then all the cartons which will be used.
Quick Scan
The Quick Scan option allows the packer to quickly pack many cartons from one tote. This feature should be used primarily when putting a high quantity of goods into one carton. The quantity is assumed to be one.

Parameter ID:1055

Name
Quick Pack

Parameter Type
Packing

Level
Global

Value
- No: Quick pack is not used. [default]
- Yes: Quick pack is allowed.

Description
Quick Pack
Quick pack allows packing of all items in a tote into one carton at once.
The carton will contain all the items from the tote. The quick pack option will only be applicable for totes containing at most one order. If a tote has multiple orders in it, quick pack option is not used.

Parameter ID:1066

Name
Hold Order For Packing

Parameter Type
Packing

Level
Global

Value
- No [default]
- Yes

Description
Hold Order For Packing
Does an order have to be picked complete prior to packing? This question is a business rule. If an order cannot be packed before all picking for it is complete, the order can take up valuable packing resources. If an order is not held until completely picked, the order can ship in multiple parts.
No
The packer can pack part of an order at any time.
Yes
The packer cannot pack an order until the order is completely picked.

Parameter ID:5250

Name
Display qty in pack

Parameter Type
Packing

Level
Global

Value
- Yes: The RF operator will see the expected quantity and is not forced to verify the quantity packed. This expedites the quantity packed and the packing process, but accuracy is compromised. [default]
- No: The RF operator must enter the quantity packed. This enforces accuracy and is recommended.

Description
Should TWL initially display the quantity on the Pack Verification Screen?
Should the user be able to see the quantity TWL expects in the carton or should the quantity be blank?

Parameter ID:5253

Name
Carton Sortation Verification

Parameter Type
Packing

Level
Warehouse

Value
- None [default]
- Carrier
- ShipTo
- Both

Description
Carton Sortation Verification
When adding a carton to a pallet should the Carrier and/or the Customer Ship To be verified for matching?
If Verification has been turned on then a warning will display, but it will allow the user to continue if they see fit.
Select what verification should be based on:
None - No verification
Carrier - Verify each order placed on the pallet is for the same carrier
Ship T - Verify each order placed on the pallet is for the same ship-to address
Both - Verify each order placed on the pallet is for the same carrier and ship-to address

Parameter ID:5254

Name
Carton Sortation Verification - Hard Stop

Parameter Type
Packing

Level
Global

Value
- Hard Stop
- Warning [default]

Description
Carton Sortation Verification - Hard Stop
Carton Sortation Verification will check Ship To Addresses and Carriers. It will allow either a hard stop or a warning when encountering a mismatch. If Hard Stop is chosen and a mismatch is found, then TWL will NOT allow the user to proceed. If Warning is chosen and a mismatch is found, then TWL will display a warning. The user will be allowed to override the mis-match and proceed with Carton Sortation.
Select the Mis-Match Processing:
Warning: User can continue
Hard Stop-Error: No continuation

Parameter ID:5255

Name
Display SX.e Pack Slip Confirmation

Parameter Type
Packing

Level
Warehouse

Value
- No [default]
- Yes

Description
This parameter will enable the TWL RF system to display confirmation for each Order that the SX.e packing slip printed and to which printer the report was sent.
Enable this functionality?

Parameter ID:5256

Name
Multi-UOM TWL Packing List

Parameter Type
Packing

Level
Global

Value
- No [default]
- Yes

Description
Do you want to perform the Multi-UOM calculation when printing TWL packing slips in the RF software?
If NO then all quantities will be printed in an "EACH" quantity value.
If YES then the correct UOM and corresponding quantity of that UOM will be printed.

Parameter ID:5257

Name
Order Notes

Parameter Type
Packing

Level
Global

Value
Specify one or more of these values: O,C,L,P [default]

Description
Order Notes Display
Which Order notes do you want to display during Packing?
O - Order (header) Notes
C - Customer Notes
L - Line Notes
P - Product Notes
Enter selection in a comma-delimited list.
For example: To see all notes enter
O,C,L,P

Parameter ID:5258

Name
Warehouse Transfer Notes

Parameter Type
Packing

Level
Global

Value
Specify one or more of these values: O, L, P [default]

Description
Warehouse Transfer Notes Display
Which warehouse Transfer notes do you want to display during Packing?
O - Order (header) Notes
L - Line Notes
P - Product Notes
Enter selection in a comma-delimited list.
For example: To see all notes enter
O,L,P

Parameter ID:5259

Name
Vendor Return Notes

Parameter Type
Packing

Level
Global

Value
Specify one or more of these values: O, L, P [default]

Description
Vendor Return Notes Display
Which Vendor Return notes do you want to display during Packing?
O - Order (header) Notes
L - Line Notes
P - Product Notes
Enter selection in a comma-delimited list.
For example: To see all notes enter
O,L,P

Parameter ID:5260

Name
Allow Report Printer For SX.e Pack Slip

Parameter Type
Packing

Level
Global

Value
- No [default]
- Yes

Description
This parameter will enable the TWL RF system to use the report printer for the SX.e packing slip.

Shipping 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:0003

Name
SCM Order Comments

Parameter Type
Shipping

Level
Global

Value
- No [default]
- Yes

Description
Order Comment Display During Shipping SCM Options
When an order comment exists for an order, do you want the user to view the comment during SCM Create Label and SCM Inquiry on the RF?
The order comment is not the same as the order notes/comments that come down from SX.e. This field is usually used for storing information such as 'Zero Pick' and 'Zero Ship' messages during order dropping.

Parameter ID:1027

Name
Percent Weight Accuracy

Parameter Type
Shipping

Level
Global

Value
Specify a percentage. [default=10]

Description
Enter a value of accuracy for weight on a carton. The carton weight should be within this percent of the weight of the items.
Percentage allow for weight variance in the shipping dock. For example, if it is set to 10 and the carton weights at 100, if user overwrites,the weight can't be under 90 or over 110.

Parameter ID:1058

Name
Print Question

Parameter Type
Shipping

Level
Global

Value
- No [default]
- Yes

Description
When the last line of an order is shipped, do you want to print a the defined printing report? The report is specified in the system parameters.

Parameter ID:1064

Name
Automatic Wave Report

Parameter Type
Shipping

Level
Global

Value
Specify a file name. [default=blank]

Description
Automatic Wave Report
A wave is a grouping of orders to be processed for customers. After all the orders are completed, a summary report can be generated.
Enter the Unix file name to run.

Parameter ID:1065

Name
Reprint Bill of Lading

Parameter Type
Shipping

Level
Global

Value
Specify a file name, such as prn_bol.p. [default=prn_bol.p]

Description
Reprint Bill Of Lading
Due to printer jams, or lost paper work, or through other business reasons, you must be able to reprint Bill of Lading. This system parameter is used for determining the proper Bill of Lading to reprint with.
Enter the Unix file name to run.

Parameter ID:4000

Name
Delete Carton Sortation Pallets

Parameter Type
Shipping

Level
Global

Value
- No [default]
- Yes

Description
Do you want to delete the Pallets used for Carton Sortation after they have been shipped?
This will allow you to reuse the same sortation pallet once it has been shipped.
The carton information will be the only record retained in the system!

Parameter ID:4001

Name
Shipping Notes

Parameter Type
Shipping

Level
Warehouse

Value
- Order notes for all
- Order and line notes for all
- No notes displayed [default]

Description
Display Notes During Shipping
How should notes be displayed during Ship Verification and Ship To Dock on the RF?
The options are...
- Order notes for all orders in carton/pallet
- Order and line notes for all orders in carton/pallet
- No notes displayed

Parameter ID:4002

Name
Order Load Stage Ship All Button

Parameter Type
Shipping

Level
Global

Value
- Off
- Single [default]
- Double

Description
Do you want to enable the "Ship All" button in the exception manager shipping screen for loaded orders?
If "OFF" then the button will not be enabled.
If "Single" then the "Ship All" button will be enabled and the user will be presented with a single confirmation.
If "Double" then the "Ship All" button will be enabled and the user will be presented with two confirmations.

Parameter ID:4003

Name
Close and Print Manifest

Parameter Type
Shipping

Level
Warehouse

Value
- No [default]
- Yes

Description
Do you want the ability to close and print the TWL manifest from the Shipping Screens?
This will give you the ability to close the manifest for the current dock and carrier, print the manifest, and open a new manifest from the shipping screens without having to release the carrier from the dock.
This is only useful if you want to create multiple manifests while retaining the current carrier at the dock.

Parameter ID:8503

Name
Ship Complete: Status Messages

Parameter Type
Shipping

Level
Global

Value
- No Messages [default]
- All Messages
- Only “More cartons...”
- Only “All cartons...”

Description
When ship verifying, the following messages can be displayed to aid in processing ship complete orders:
"Ship Complete: More cartons to follow"
and
"Ship Complete: All Cartons verified"
These messages are designed to alert the shipper that there are more cartons in the ship complete order, or that there are no more cartons in the order.
Which messages should be displayed?

Appendix C: 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**.

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.