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Managing Order Releases in PeopleSoft Order Fulfillment

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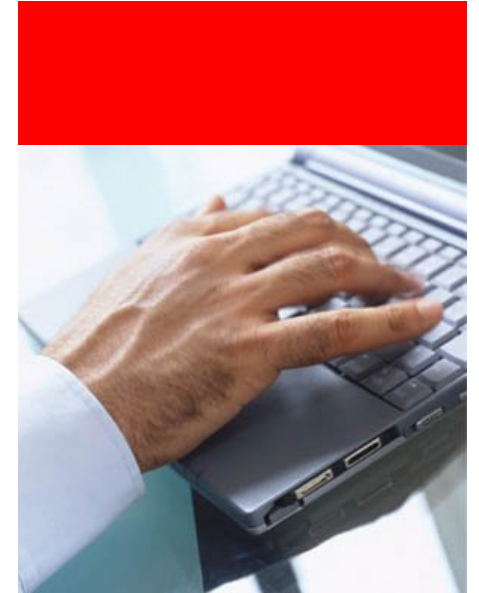


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Agenda

- Order Release Management Overview
- Key Pre-Order Release Features
- Two Order Release Use Cases
- Additional Order Release Options
- Summary of Topics Covered
- Questions



Order Release Management Overview

Order Entry

Material
Reservations
and
Shortage
Handling

Order Release
Processing

Process
Released
Orders

Pick

Pack

Ship

Unfulfilled State

Releasable State

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Key Order Release Features

- Order Entry
 - Reservations / ATP
 - Alternate Sourcing
 - Pegging
 - Auto-Processing
- Reservations Processing
 - Expanded Selection Criteria
 - Reservation and Backorder Rules
 - Exception Messages in Shortage Conditions
 - Auto-Processing



Key Order Release Features

- Shortage Workbench
 - Provide order, line and item level views of shortages
 - Actions to Resolve Shortages
 - Create and Cancel backorders
 - Steal from another order (unreserve/reserve)
 - Allow Negative Reservations
 - Item Availability Inquiry
 - Pegging
 - Workbench driven by templates
 - Selection criteria / shortage actions defined in templates
 - Security on templates



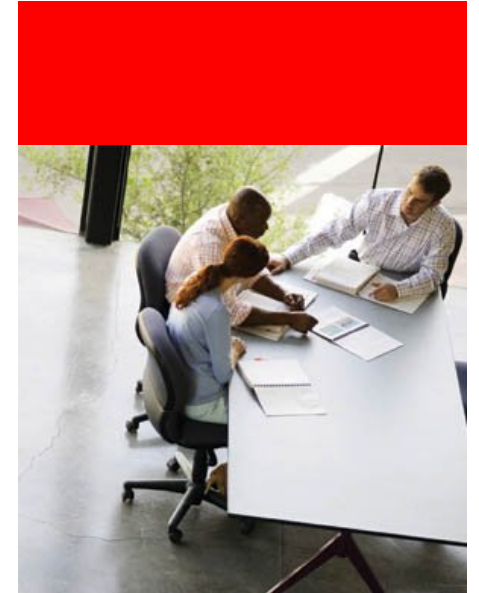
Key Order Release Features

- Pegging
 - Peg demand to incoming supply
 - Automatically Allocate and/or Reserve upon Receipt/Putaway
- Order Release Processing
 - Expanded Selection Criteria
 - Picking Rules
 - Additional picking rules
 - Rules now defined on Order Release request
 - Picking Plan Print Options
 - Additional sort and page break options
 - Rules for printing in shortage conditions



Use Case One

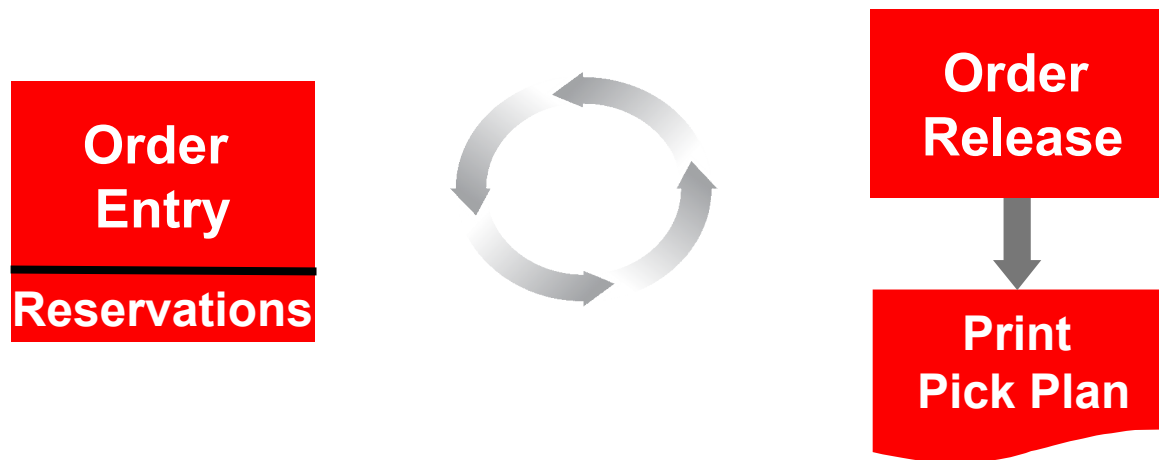
Enter Order and Immediately Print Pick Ticket



Use Case One

Enter Order and Immediately Print Pick Ticket

- Create sales order in “pick & pack” environment
- Auto-Reserve at order entry time
 - Use Reservation Rule to release only if 100% available
- Order Release Job running in background every 10 minutes to release and print pick tickets





Use Case One:

Enter Order and Immediately Print Pick Ticket

- Use Case One Setup
- Procedural Steps to execute use case
- Automated steps performed by system
- Shortage handling support at sales order entry time
- Optional steps from Create/Update MSR Component



Use Case One:

Enter Order and Immediately Print Pick Ticket

- Setup
 - Auto-Reservations Setup
 - Reservation Rule Setup
 - Reservation Rule Default
 - Setup Arbitration rule
 - Setup Default Rule
 - Order Release Run Control Setup
 - Setup Order Release Recurring Job



Use Case One:

Enter Order and Print Pick Ticket

- Procedural Steps (one step)
 - Enter Sales Order and Save
- Automated Steps upon Save
 - If all items are available....
 - Reserve and set order to a “releasable” state
 - Order Release Job will then release the order and print pick ticket.
 - If all items are not available...
 - Reservations will reserve what it can and hold order in “unfulfilled” state

Use Case One: Enter Sales Order

Order Entry Form

▼ Header Summary

Order:
 Unit:
 Order Date:
 Order Status:
 ***Order Group:**
 Header Menu:

▼ Sold To

Location:

Alliance Group

▶ [Sold To Details](#)

▼ Bill To

Location:

Alliance Group

▶ [Bill To Details](#)

▶ Header Detail

Order Line Entry

▶ Line Filter

[Customize](#) | [Find](#) | [View All](#) |
 First 1-5 of 5 Last

Line	Product	Fulfillment Data	Margins	Requested Dates	Scheduled Dates	Ship To	Ship To Taxes	Ship Options 1			Quantity Available	Quantity Reserved	Quantity Shipped			
*Line	*Status	Product ID	Quantity	UOM	Pick Up	Unit Price	Extended Amount	Ship From								
<input type="radio"/>	1	Open	10032	2.0000	EA	<input type="checkbox"/>	299.0000	598.00	USD	US010			1320.0000	0.0000	0.0000	
<input type="radio"/>	2	Open	10033	1.0000	EA	<input type="checkbox"/>	325.0000	325.00	USD	US010			1200.0000	0.0000	0.0000	
<input type="radio"/>	3	Open	10034	3.0000	EA	<input type="checkbox"/>	359.0000	1077.00	USD	US010			1200.0000	0.0000	0.0000	
<input type="radio"/>	4	Open	10035	2.0000	EA	<input type="checkbox"/>	199.0000	398.00	USD	US010			2400.0000	0.0000	0.0000	
<input checked="" type="radio"/>	5	Open	10036	1.0000	EA	<input type="checkbox"/>	220.0000	220.00	USD	US010			2400.0000	0.0000	0.0000	

Use Case One: Printed Pick Ticket

Report ID: INS6000
 Bus. Unit: US010 -- PHOENIX BIKE/OUTDOOR

PeopleSoft Inventory
 MATERIAL PICKING PLAN
 Picking Plan Only
 Picking Plan Sorted by Order No. (Break)
 System Selected Locations (Allocations Created)
 Pick Batch ID: 26

Page No. 3
 Run Date 11/03/2007
 Run Time 17:25:14

**** PICK THE BROKEN PALLETS FIRST ****

 This is the TMS Standard Note. Should print out on BOL and Pick plan.

<u>DS</u>	<u>SrcBU</u>	<u>Order No.</u>	<u>Line</u>	<u>Sched</u>	<u>Ship To</u>	<u>Item ID</u>	<u>Carrier ID</u>	<u>Ship Via</u>	<u>Freight Term</u>	<u>Release Quantity</u>
CM	US001	CEN1126	1	1	1000	10032	SURFACE	COMMON	DES	2.0000 EA
1					Alliance Group	4 Season Convertible Tent				
					<u>Priority</u>				<u>Export</u>	
					999				N	

<u>ASRS ID</u>	<u>Area</u>	<u>Lev1</u>	<u>Lev2</u>	<u>Lev3</u>	<u>Lev4</u>	<u>Container</u>	<u>Release Quantity</u>
2801	AREA2	3	1			1003201	2.0000 EA

Requested Quantity: 2.0000 EA Reserved Quantity: 2.0000 EA

<u>Line</u>	<u>Sched</u>	<u>Ship To</u>	<u>Item ID</u>	<u>Carrier ID</u>	<u>Ship Via</u>	<u>Freight Term</u>	<u>Release Quantity</u>
2	1	1000	10033	SURFACE	COMMON	DES	1.0000 EA
		Alliance Group	Gamma3 Mountain Tent				
							<u>Export</u>
							N

<u>ASRS ID</u>	<u>Area</u>	<u>Lev1</u>	<u>Lev2</u>	<u>Lev3</u>	<u>Lev4</u>	<u>Container</u>	<u>Release Quantity</u>
2801	AREA2	3	1			1003301	1.0000 EA

Requested Quantity: 1.0000 EA Reserved Quantity: 1.0000 EA

<u>Line</u>	<u>Sched</u>	<u>Ship To</u>	<u>Item ID</u>	<u>Carrier ID</u>	<u>Ship Via</u>	<u>Freight Term</u>	<u>Release Quantity</u>
3	1	1000	10034	SURFACE	COMMON	DES	3.0000 EA
		Alliance Group	Outlook 4000 3 Person Tent				
							<u>Export</u>
							N

<u>ASRS ID</u>	<u>Area</u>	<u>Lev1</u>	<u>Lev2</u>	<u>Lev3</u>	<u>Lev4</u>	<u>Container</u>



Use Case One:

Sales Order Entry Shortage Handling

- User interface showing reservation / ATP shortages
- Alternate Sources of Supply
 - View available supply at other warehouses
 - View incoming supply on purchase orders, transfer orders and production orders
 - Peg to transfer orders, purchase orders, requisitions
 - Create new transfer Orders, purchase orders, requisitions
 - Rule based with security to control options allowed by CSR



Use Case One: (Optional Approaches)

Enter Order and Immediately Print Pick Ticket

- Create/Update Stock Request
 - Option to Reserve in background or on-line mode
 - Auto-Release allowing printing pick ticket without use of a Recurring Job
 - Link to Pegging Workbench (Security Controlled)

Setup MSR Entry Option for Background or On-Line Reservations Processing

Menu

- ▼ Fulfillment Rules
 - Setup Fulfillment
 - Setup Item Fulfillment
 - Reservation/Backorder Rules
 - Template Maintenance
 - Template Permissions Inquiry
- ▷ Routes and Loads
- ▷ Stock Requests
- ▷ Picking
- ▷ Shipping
- ▷ Shipping Reports
- ▷ Inventory Planning Messages
- ▷ Review Fulfillment Information
- ▷ Shipping Excise IND
 - Fulfillment Workbench
 - Shortage Workbench
 - Screen for Denied Parties
- ▷ Replenish Inventory
- ▷ Replenish Par Locations
- ▷ Inventory Counts

[New Window](#) | [Customi](#)

Setup_Fulfillment | Fulfillment_Engine | **Reservation** | ATP Reservations | Order Release | Electronic Fulfillment

Unit: US010

Material Reservations

- Auto Partial Qty Approval
- Reservation Lead Days: 400
- Use Closure Calendar
- Allow Override of Lead Days
- Max Lead Days: 400
- Final Sort Option: Date
- Negative Available Qty Allowed
- Release Kit Multiples

MSR Entry Reservations

Online Background

MSR Default Reservation Rules

- Line Backorder Rule: 🔍
- Line Reservation - Backorder: 🔍
- Line Reservation Rule: 🔍
- Order Reservation Rule: 🔍

Soft Reservations

- Soft Reserve
- Reserve Online

Setup of Auto-Release from Create/Update MSR Component

Fulfillment Engine Options
Business Unit US010

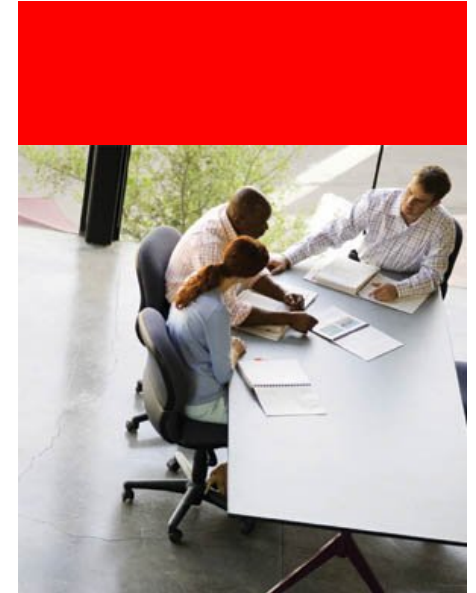
Fulfillment Engine Options

Processing Options | Passthrough Options | From States | **Auto-Processing Options** | Kit Re-Explode Options

Page / Process	Transaction Program	Allow Auto-Processing Override	Auto-Processing Option	Auto Release User ID	Auto Release Run Control	Auto Process at Save
Reserve Materials Process		<input checked="" type="checkbox"/>	No Auto-Processing			
Create/Update Stock Request			Advance to Released	VP1	MSR_RE	<input type="checkbox"/>
Order Release Request		<input checked="" type="checkbox"/>	No Auto-Processing			
Picking		<input checked="" type="checkbox"/>	No Auto-Processing			
Material Picking Feedback		<input checked="" type="checkbox"/>	No Auto-Processing			<input type="checkbox"/>
Picking Confirmation		<input checked="" type="checkbox"/>	No Auto-Processing			
Front-end Shipping Requests		<input checked="" type="checkbox"/>	No Auto-Processing			
Express Issue						<input type="checkbox"/>
Shipping Requests		<input checked="" type="checkbox"/>	No Auto-Processing			
Shipping/Issues						<input type="checkbox"/>
Deplete On Hand Quantity						<input checked="" type="checkbox"/>
Kit Re-Explode						
Fulfillment Workbench	Request to Reserve	<input checked="" type="checkbox"/>	No Auto-Processing			

Use Case Two

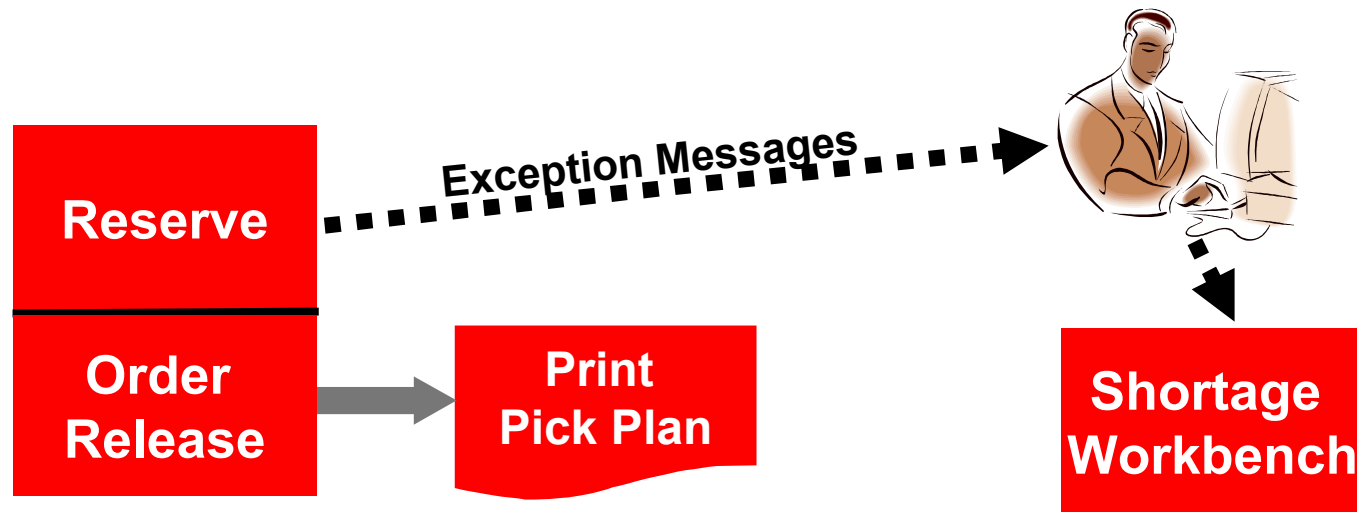
Warehouse Controls Reservation with Immediate Release to Print Pick Ticket



Use Case Two

Warehouse Controls Reserve and Release

- Run Reservations at Periodic Intervals
 - Use Reservation Rule: Release only if 100% available. Two days prior to scheduled ship date notify if shortage exists.
- Automatically Print Pick Ticket when Fully Reserved
- Use Shortage Workbench to Manage Shortage Situations





Use Case Two:

Warehouse Controls Reserve and Release

- Use Case Two Setup
- Procedural steps to execute use case
- Automated steps performed by system
- Shortage Handling



Use Case Two:

Warehouse Controls Reserve and Release

- Setup
 - Reservation Rule Setup
 - Reservations Run Control Setup
 - Order Release Run Control Setup

Use Case Two: Reservation Rule Setup

Reserve - Order

Rule Code 0100 Rule Type Order Reservation Rule Description 100% Fill Rate Rule

Reservation Rules and Actions Find | View All First 1 of 2 Last

Set releasable when... Notify When... Message Text

Rule Sets Find | View All First 1 of 1 Last

List of Criteria Find | View All First 1 of 1 Last

Field to Compare	Comparison Operator	Value	Compare String
Percentage Fill	Greater or equal	100.000	Percent Based on Lines

[Delete This Rule Set](#)

Use Case Two: Reservation Rule Setup

Reserve - Order

Rule Code 0100 Rule Type Order Reservation Rule Description

Reservation Rules and Actions Find | View All First 2 of 2 Last

Set releasable when...
 Notify When... Message Text Order has shortages within two days of ship date

Rule Sets Find | View All First 1 of 1 Last

List of Criteria Find | View All First 1-2 of 2 Last

Field to Compare	Comparison Operator	Value	Compare String	
Percentage Fill	Less than	100.000	Percent Based on Lines	+ -
Date	Later or Equal To	2	Days Before Sched Ship Date	+ -

[Delete This Rule Set](#)

Use Case Two: Reservations Run Control

Run Control ID: RELEASE_FROM_OE

[Report Manager](#) [Process Monitor](#)

Run

Process Request Parameters Find | View All First 1 of 1 Last

Process Frequency

Process Once
 Always Process
 Don't Run

*Request ID: 1 Description: Reserve and Release

Business Unit: US010 To Business Unit: US010 All Business Units

Reserve by Date: [] Date From: [] Through: []

*Use Lead Days: Use Fulfillment Lead Days Lead Days: []

Demand Source: [] Source Unit: []

Order Number: [] To: [] Order Line: []

Schedule Line: [] Load ID: []

Route Group: [] Route Code: []

Customer ID: [] Location: []

Ship To Customer: [] Address Number: []

Carrier ID: [] Ship Method: []

Parent Product ID: [] Item ID: []

Priority: [] To [] Product ID: []

***Auto Release Option:** Advance to Released **Release Run Control:** REL_FROM_RESV

[Return](#)

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Use Case Two: Order Release Run Control

Run Control ID: REL_FROM_RESV

[Report Manager](#) [Process Monitor](#)

Run

Process Request Parameters Find | View All First 1 of 1 Last

Process Frequency

Process Once
 Always Process
 Don't Run

*Request ID: Description: + -

Business Unit: To Business Unit: All Business Units

*Action: *Auto-Processing Option: Auto Pick

Output Options

Picking Plan Picking Extract File Item Usage Labels Language:

Shipping Order Release Carton Labels

Selection Criteria

Select Unfulfilled Backorders Only

Select Releasable Export Shipments Only

TMS Lines Awaiting Upload Select Orders

Date/Time Selection

Lead Days/Minutes From: Thru:

Lead Days: Minutes: Until:

Locations Selected By

Picking Rules [Rule Overrides](#) Single Location Only

Default Shipping Location

Specific Location

[Additional Options](#) [Processing Options](#) [View Process Defaults](#) [File Overrides](#)

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Use Case Two:

Warehouse Controls Reserve and Release

- Procedural Steps (one step)
 - Initiate Reservations Processing either on-request or as a recurring job.
- Automated Steps Initiated from Reservations Processing
 - Items available....
 - Reserve order and move to a releasable state
 - Run the order release process and print the pick ticket
 - If not available...
 - Reserve all that is available but keep order in unfulfilled state.
 - If less than two days prior to ship date then send exception message

Use Case Two: Exception Message

EWN Message Dashboard

Message Dashboard

Selection Criteria

Process Name:	<input type="text" value="OM_RESERVATIONS"/>	Date From:	<input type="text" value="11/01/2007"/>	To:	<input type="text" value="11/09/2007"/>
Process Category:	<input type="text"/>	Status:	<input type="text"/>		
Business Unit:	<input type="text"/>				
Worklist User ID:	<input type="text"/>	Search Key Name:	<input type="text"/>		
Process Instance:	<input type="text"/>	Search Key Value:	<input type="text"/>		

Search

Search Results

*Status	Date Time Added	Process Name	Process Category	Seq	Log Message
Open	11/07/07 8:57:48.000000AM	OM_RESERVATIONS	RESERVE_RULES	93	Notification: This is a test message. pertains to demand line US008, OM, US001, EGS-S06, 1, 1, 1
Open	11/07/07 8:41:04.000000AM	OM_RESERVATIONS	UNRESERVE_SHORTWB	92	Sales Order (Business Unit: US001, Order No: EGS-S06, Order Line: 2, Schedule Line Number: 1, Item:
Open	11/07/07 8:41:02.000000AM	OM_RESERVATIONS	UNRESERVE_SHORTWB	90	Sales Order (Business Unit: US001, Order No: EGS-S06, Order Line: 1, Schedule Line Number: 1, Item:

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Use Case Two:

Warehouse Controls Reserve and Release

- Use Case Two Setup
- Procedural steps to execute use case
- Automated steps performed by system
- Shortage Handling



Use Case Two: Shortage Handling

- Shortage Workbench
 - Key Features
 - Template Setup
- Pegging
 - Pegging Overview
 - Pegging Setup
- Backorder Rules



Use Case Two: Shortage Handling

Shortage Workbench

- Key Features
 - Selection Criteria
 - Order View, Demand Line View or Item View
 - 14 Actions Provided to User
 - Links Provided to User
 - Item Availability
 - Pegging Workbench
 - Stock Request Inquiry
 - Apportion reservation quantities based on priority rank

Use Case Two: Shortage Handling

Shortage Workbench Selection Criteria

Shortage Workbench

Business Unit: US010 Template ID: BASIC View By: Demand Lines View

Selection Criteria

Select Unfulfilled Select Releasable
 Select WO Lines Exclude Backordered Lines
 Exclude Fully Reserved Lines Exclude Pegged Lines
 Display Shortages Only *Filter Unfulfilled Lines: Post Reservation

Display Unapproved: [Dropdown] Selection Date: [Dropdown] (All, Post Reservation, Prior to Reservation)
Select by Date: [Dropdown] Use Lead Days: [Dropdown]
Selection Time: [Text]
Lead Days for Calendar: [Text] Source: [Dropdown]
Order No: [Text] Order Line: [Text] Schedule Line Number: [Text]
Item ID: [Text] Demand Line: [Text]
Carrier ID: [Text] Ship Via Code: [Text]
Route Group: [Text] Route Code: [Text]
Customer ID: [Text] Location Code: [Text]
Ship To Customer: [Text] Address Sequence Number: [Text]
TMS Reference ID: [Text] TMS Line Number: [Text]
Load ID: [Text] Category Code: [Text]
Item Group: [Text] Family: [Text]
Order Type: [Text] Order Group: [Text]

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Use Case Two: Shortage Handling

Shortage Workbench Demand Line View

Demand Lines

Business Unit: US010 Template ID: BASIC

▶ Demand Filters

Detail Action: Accept Override Quantity Process

Reason Code: Accept Override Quantity

Select All

Demand Lines: Customize | Find

	Source	Order UOM	Rules / Status	Shipping	Destination	Reference Keys	Reserve Type	Fulfillment State	Unplanned Quantity Base	Pegged Quantity	Planned Release Base	Line Action
1	OM/US001	CEN1147/2/1/1	10033	Soft	Unfulfilled						10.0000	
2	OM/US001	CEN1147/2/1/1	10033	Soft	Unfulfilled						10.0000	
3	OM/US001	CEN1147/3/1/1	10018	Soft	Unfulfilled	10.0000						
4	OM/US001	CEN1148/1/1/1	10032	Soft	Unfulfilled						10.0000	
5	OM/US001	CEN1148/2/1/1	10034	Soft	Unfulfilled						10.0000	
6	OM/US001	CEN1148/3/1/1	10018	Soft	Unfulfilled	10.0000						
7	OM/US001	CEN1149/1/1/1	10032	Soft	Unfulfilled						10.0000	
8	OM/US001	CEN1149/2/1/1	10018	Soft	Unfulfilled	10.0000						
9	OM/US001	CEN1149/3/1/1	10033	Soft	Unfulfilled						10.0000	

Item Available
Peg to Supp
Stock Requ

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Use Case Two: Shortage Handling

Shortage Workbench Item View

Item View

Business Unit: US010 Template ID: BASIC

Item Quantity Details

Item ID: 10018 Explorer Headband Nite Lite Std UOM: EA
 Qty Available: 24.0000 Qty Reserved: 1206.0000 Open Demand Quantity: 199.0000

Demand Filters

Detail Action:

Reason Code Defaulting

Demand Lines

Demand Information											Quantity	Std UOM	Quantity	Order UOM	Rules / Status	Shipping	Destination	Reference Keys
	Priority Rank	Source Key	Order Key	Reserve Type	Fulfillment State	Unplanned Qty	Pegged Quantity	Planned Release Base	Line Action									
1	<input type="checkbox"/>	10 OM/US001	CEN1134/3/1/2	Soft	Unfulfilled	100.0000			▼									
2	<input type="checkbox"/>	10 OM/US001	CEN1138/3/1/2	Soft	Unfulfilled	10.0000			▼									
3	<input type="checkbox"/>	10 OM/US001	CEN1139/3/1/2	Soft	Unfulfilled	10.0000			▼									
4	<input type="checkbox"/>	10 OM/US001	CEN1141/3/1/2	Soft	Unfulfilled	10.0000			▼									
5	<input type="checkbox"/>	10 OM/US001	CEN1142/2/1/2	Soft	Unfulfilled	10.0000			▼									
6	<input type="checkbox"/>	40 OM/US001	CEN1135/1/1/1	Soft	Unfulfilled	4.0000		6.0000	▼									

[Return](#)

Use Case Two: Shortage Handling

Shortage Workbench Item View

Demand Lines										
Demand Information			Quantity Std UOM	Quantity Order UOM	Rules / Status	Shipping	Destination	Reference Keys		
	<input type="checkbox"/>	Priority Rank	Source Key	Order Key	Reserve Type	Fulfillment State	Unplanned Qty	Pegged Quantity	Planned Release Base	Line Action
1	<input type="checkbox"/>	10	OM/US001	CEN1134/3/1/2	Soft	Unfulfilled	100.0000			
2	<input type="checkbox"/>	10	OM/US001	CEN1138/3/1/2	Soft	Unfulfilled	10.0000			
3	<input type="checkbox"/>	10	OM/US001	CEN1139/3/1/2	Soft	Unfulfilled	10.0000			
4	<input type="checkbox"/>	10	OM/US001	CEN1141/3/1/2	Soft	Unfulfilled	10.0000			
5	<input type="checkbox"/>	10	OM/US001	CEN1142/2/1/2	Soft	Unfulfilled	10.0000			
6	<input type="checkbox"/>	40	OM/US001	CEN1135/1/1/1	Soft	Unfulfilled	4.0000		6.0000	
7	<input type="checkbox"/>	40	OM/US001	CEN1136/1/1/1	Soft	Unfulfilled	5.0000			
8	<input type="checkbox"/>	40	OM/US001	CEN1137/1/1/1	Soft	Unfulfilled	10.0000			
9	<input type="checkbox"/>	40	OM/US001	CEN1147/3/1/1	Soft	Unfulfilled	10.0000			
10	<input type="checkbox"/>	40	OM/US001	CEN1148/3/1/1	Soft	Unfulfilled	10.0000			

Select All Deselect All

Apportion

Apportion Quantity

Apportion Method

Percent

-
-
-

Return

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Use Case Two: Shortage Handling

Shortage Workbench Item View

Demand Lines										
Demand Information			Quantity Std UOM	Quantity Order UOM	Rules / Status	Shipping	Destination	Reference Keys		
	Priority Rank	Source Key	Order Key	Reserve Type	Fulfillment State	Unplanned Qty	Pegged Quantity	Planned Release Base	Line Action	
1	<input checked="" type="checkbox"/>	10 OM/US001	CEN1134/3/1/2	Soft	Unfulfilled	100.0000		10.0000	▼	
2	<input checked="" type="checkbox"/>	10 OM/US001	CEN1138/3/1/2	Soft	Unfulfilled	10.0000		10.0000	▼	
3	<input checked="" type="checkbox"/>	10 OM/US001	CEN1139/3/1/2	Soft	Unfulfilled	10.0000		4.0000	▼	
4	<input checked="" type="checkbox"/>	10 OM/US001	CEN1141/3/1/2	Soft	Unfulfilled	10.0000			▼	
5	<input checked="" type="checkbox"/>	10 OM/US001	CEN1142/2/1/2	Soft	Unfulfilled	10.0000			▼	
6	<input checked="" type="checkbox"/>	40 OM/US001	CEN1135/1/1/1	Soft	Unfulfilled	4.0000		6.0000	▼	
7	<input checked="" type="checkbox"/>	40 OM/US001	CEN1136/1/1/1	Soft	Unfulfilled	5.0000			▼	
8	<input checked="" type="checkbox"/>	40 OM/US001	CEN1137/1/1/1	Soft	Unfulfilled	10.0000			▼	
9	<input checked="" type="checkbox"/>	40 OM/US001	CEN1147/3/1/1	Soft	Unfulfilled	10.0000			▼	
10	<input checked="" type="checkbox"/>	40 OM/US001	CEN1148/3/1/1	Soft	Unfulfilled	10.0000			▼	

Select All Deselect All

Apportion

Apportion Quantity

Apportion Method

Maximum Quantity

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Use Case Two: Shortage Handling

Shortage Workbench

- Setup Shortage Workbench Template
 - Streamline Selection Criteria
 - Control Workbench “Actions”
 - Permission provided to access a template



Use Case Two: Shortage Handling

- Shortage Workbench
 - Key Features
 - Template Setup
- Pegging
 - Pegging Overview
 - Pegging Setup
- Backorder Rules



Use Case Two: Shortage Handling

Pegging Overview

- Pegging Workbench
 - View incoming supply: Purchase Orders, Transfer Orders and Production Orders
 - Peg demand to incoming supply
- Receiving / Putaway Processing
 - Optionally Allocate or Soft Reserve at putaway time
 - Putaway to Pegging Location



Use Case Two: Shortage Handling

Pegging Overview

- Reservations Processing
 - Will not try and reserve pegged orders
 - Once received & putaway reservations processing moves order to “Releasable” state if reservation rule satisfied
- Order Release Process
 - Pick from pegging location



Use Case Two: Shortage Handling

Pegging Setup Pages

- Pegging Setup
 - Allocate or reserve to demand upon receipt/putaway
 - Putaway to pegging location base on pre-set lead days
 - Set time fence for viewing supply and demand on Pegging Workbench
- Pegging Security



Use Case Two: Shortage Handling

- Shortage Workbench
 - Key Features
 - Template Setup
- Pegging
 - Pegging Overview
 - Pegging Setup
- **Backorder Rules**



Use Case Two: Shortage Handling

Backorder Rules

- Backorder at Reservation Time or Shipping Time
- Cancel Backorder in specified situations
 - Ex...99% of order shipped

Use Case Two: Shortage Handling

Backorder Rules

Release | **Shipping**

Rule Code BCK1 **Rule Type** Line Backorder Rule

Description Cancel < 1%

Reservation Rules and Actions Find | View All First 1 of 1 Last

Release Backorder Action

- Create Backorder
- Release as Shortage
- Hold and Notify
- Cancel Backorder When...

Backorder Conditions

Field to Compare: Shortage Quantity **Comparison Operator:** Less than 1.000 Percent of Requested

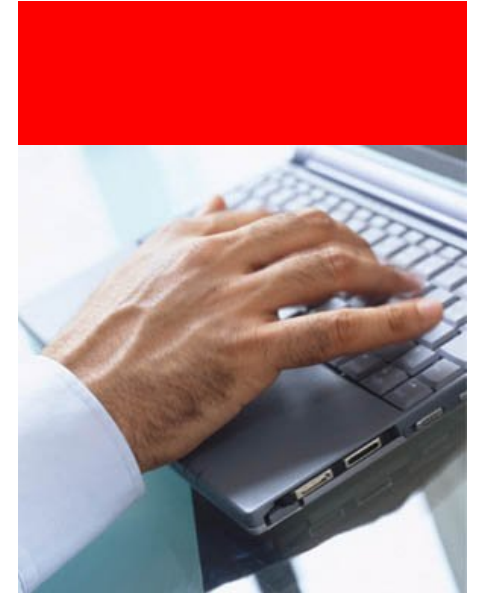
When condition not met... Create Backorder
 Hold and Notify
 Release as Shortage

Return

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Agenda

- Order Release Management Overview
- Key Pre-Order Release Features
- Two Order Release Use Cases
- Additional Order Release Options
- Summary of Topics Covered
- Questions





Additional Order Release Features

- Lot Allocations
- Release full kits option
- Kit Re-Explode processing
- Early printing of shipping documents
- Options to ship directly from unfulfilled state
 - Use Order Release if Pick Ticket is Required
 - Use Front-End Shipping if Pick Ticket not Required



Summary of Topics Covered

- Order Release / Shortage Handling Features available to CSR at order entry time
- Reservations Processing using Reservation Rules
- Order Release Processing Features



Summary of Topics Covered

- Shortage Workbench Functionality
- Pegging Overview
- Additional Order Release Features



Q & A

QUESTIONS
ANSWERS

Auto-Reserve Setup

Order Entry Features

Unit: US010 PHOENIX BIKE/OUTDOOR

Order Entry Features			
<input type="checkbox"/> Mark for Billing at Order Save	<input checked="" type="checkbox"/> Show Buying Agreement Message	Deposit Percent:	0.00
<input checked="" type="checkbox"/> Reserve at Save	<input type="checkbox"/> Allow Deposit in Credit Check	Refund Fee Percent:	10.00
<input type="checkbox"/> Lot Allocate at Save	<input type="checkbox"/> Allow Margin Adjustment		
	<input type="checkbox"/> Incl Pending Payment in Credit		
	Online	Background	
*Process Freight Charges:	None	None	
*Process Estimated Shipments:	None	None	
*Process Transport Lead Times:	None	None	
*Process Exception Calendars:	None	None	
*Ship Date Calculation Method:	None	None	
*Weight and Volume Pricing:	None	None	
*Availability Option:	None	None	
*Credit Card Authorizations:	Online		
Display			
*Customer Address:	None	*Sold To Area:	Default
*Header Information Area:	Default	*Bill To Area:	Default

(Menu Path = Setup FSCM/Business Unit/Order Management/OM Definition)

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Reservation Rule Setup

Add Line Level Reservation Rule

The screenshot displays the Oracle Reservation Rule Setup interface. On the left is a navigation menu with the following structure:

- Inventory
 - Maintain Storage Locations
 - Putaway Stock
 - Manage Inventory
 - Fulfill Stock Orders
 - Fulfillment Rules
 - Setup Fulfillment
 - Setup Item Fulfillment
 - Reservation/Backorder Rules**
 - Template Maintenance
 - Template Permissions Inquiry
 - Routes and Loads
 - Stock Requests
 - Picking
 - Shipping

The main content area is titled "Reservation/Backorder Rules" and contains two buttons: "Find an Existing Value" and "Add a New Value". Below these buttons, the "Rule Code" field is set to "L100". The "Rule Type" dropdown menu is open, showing three options: "Line Backorder Rule", "Line Reservation Rule" (which is highlighted and circled in red), and "Order Reservation Rule". An "Add" button is visible to the left of the dropdown menu. At the bottom of the main content area, there are two more buttons: "Find an Existing Value" and "Add a New Value".

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Reservation Rule Setup

Add Line Level Reservation Rule

Reserve - Line

Rule Code L100 Rule Type Line Reservation Rule Description 100% Line Reservation Rule

Find | View All First 1 of 1 Last

Set releasable when... Do not make reservation when..

Notify When... Message Text

Rule Sets Find | View All First 1 of 1 Last

List of Criteria Find | View All First 1 of 1 Last

Field To Compare	Comparison Operator	Value	Compare String
Quantity Reserved	Greater or equal	100.000	Percent of Requested

Date
Quantity Reserved

[Delete This Rule Set](#)

[Return](#)

ORACLE

Reservation Rule Setup

Add Order Level Reservation Rule - Rule One

Rule Code 0100 Rule Type Order Reservation Rule Description 100% Fill Rate Rule

Reservation Rules and Actions Find | View All First 1 of 1 Last

Set releasable when... Notify When... Message Text

Rule Sets Find | View All First 1 of 1 Last

List of Criteria Find | View All First 1 of 1 Last

Field to Compare	Comparison Operator	Value	Compare String
Percentage Fill	Greater or equal	100.000	Percent Based on Lines

Date
Order Volume
Order Weight
Percentage Fill

Delete This Rule Set

[Return](#)

ORACLE

Reservation Rule Setup

Add Order Level Reservation Rule – Rule Two

Rule Code 0100 Rule Type Order Reservation Rule Description

Reservation Rules and Actions Find | View All First 2 of 2 Last

Set releasable when...

Notify When... Message Text

Rule Sets Find | View All First 1 of 1 Last

List of Criteria Find | View All First 1-2 of 2 Last

Field to Compare	Comparison Operator	Value	Compare String
Percentage Fill	Less than	100.000	Percent Based on Lines
Date	Later or Equal To	2.000	Days After

[Delete This Rule Set](#)

Compare String Dropdown:

- Sched Ship Date
- Arrival Date
- Early Ship Date
- Late Ship Date
- Sched Ship Date

[Return](#)

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Reservation Rule Defaults

Default to Sales Order – Arbitration Plan

Arbitration Plan

SetID: SHARE Arbitration: BRP0000002
*Description: Arb Plan by Cust Grp / Inv BU

Arbitration Plan Sequences		Find View 1	First	1-2 of 2	Last
Sequence					
1	Key Set	Customize Find View All	First	1 of 1	Last
Rule Keys	Field Long Name				
	Customer Group				
<hr/>					
2	Key Set	Customize Find View All	First	1 of 1	Last
Rule Keys	Field Long Name				
	Inventory Unit				

[Return](#)

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Reservation Rule Defaults

Default to Sales Order – Arbitration Key Fields

Key Fields

Key Fields		Find	First	1-12 of 12	Last
Select	Field Long Name				
<input type="checkbox"/>	Inventory Unit				
<input type="checkbox"/>	Product ID				
<input type="checkbox"/>	Item ID				
<input type="checkbox"/>	Item Group				
<input type="checkbox"/>	Ship To Customer				
<input type="checkbox"/>	Shipping Priority Code				
<input type="checkbox"/>	Order Group				
<input type="checkbox"/>	Source Code				
<input type="checkbox"/>	Sold To Customer				
<input type="checkbox"/>	Customer Group				
<input type="checkbox"/>	Product Group				
<input type="checkbox"/>	Region Code				

[Return](#)

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Reservation Rule Defaults

Default to Sales Order – Default Rule

Reservation / Backorder Rule Keys and Formulas

Rule Details

SetID: SHARE Rule ID: NEXT [Copy Rule](#)

Select Key Fields

Value	Field Long Name
PICK_PACK	Customer Group

Assign Reservation/Backorder Formulas

[Return](#)

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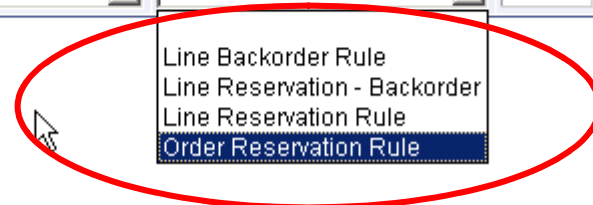
Reservation Rule Defaults

Default to Sales Order – Default Rule

Reservation/Backorder Rule Formulas

Start Date	End Date	Status	Default Rule	Rule Code		
09/10/2007	01/01/2099	Active	Line Backorder Rule	BCK1	+	-
09/10/2007	01/01/2099	Active	Line Reservation - Backor	LINR4	+	-
09/10/2007	01/01/2099	Active	Line Reservation Rule	L100	+	-
09/10/2007	01/01/2099	Active	Order Reservation Rule	O100	+	-

OK Cancel



[Return](#)

Reservation Rule Defaults

Default to Sales Order – Default Rule

Business Unit Definition | Business Unit Options | Business Unit Counters | Business Unit Books

Unit: US010 PHOENIX BIKE/OUTDOOR

Short Desc: PHOENIX

GL Business Unit: US001 **VAT Entity:**

AP Business Unit: US001 **Journal Template:** INVTRANS

Base Currency: USD Dollar [Update Open Periods](#)

Exchange Rate Type: CRRNT Current

Unit Group: SHARE CORPORATE INVENTORY BU GROUP

Location Code: US010 USA - Phoenix

Arbitration Plan ID: BRP0000002 Arb Plan by Cust Grp / Inv BU

Inventory Type: DIST Distribution Operations

Tax Code:

Facility Status

*Status: Open Prohibit Material Movements

Sales Orders

BI Unit: US001 AR Unit: US001

InterUnit Transfers

BI Unit: US001 AR Unit: US001

Ship To:

Location:

Flag Items for Auto-Putaway

Run Auto-Putaway Job

VMI

VMI Stock

[Return](#)

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Order Release Run Control Setup

Run Control ID: RELEASE_FROM_OE

[Report Manager](#) [Process Monitor](#)

Run

Process Request Parameters Find | View All First 1 of 1 Last

Process Frequency

Process Once
 Always Process
 Don't Run

*Request ID: 1 Description: Release From Order Entry

Business Unit: US010 To Business Unit: US010 All Business Units

*Action: Create Allocations *Auto-Processing: Use Auto-Processing Default Auto Pick Option

Output Options

Picking Plan Picking Extract File Item Usage Labels Language: English

Shipping Order Release Carton Labels

Selection Criteria

Advanced Selection Criteria
Advanced Selection Criteria
All
Specific

Select Unfulfilled Backorders Only
 Select Releasable Export Shipments Only
 TMS Lines Awaiting Upload
 Select Orders

Demand Source: OM Source Unit: US001

Order Number: To: Order Line: Schedule Line:
Route Code: Load ID:
Route Group: Location:
Customer ID: TMS ID:
Ship To Customer: Address Number:
Carrier ID: Ship Method:

[Return](#)

ORACLE

Order Release Run Control Setup

Select Releasable Export Shipments Only
 TMS Lines Awaiting Upload
 Select Orders

Demand Source: Source Unit:

Order Number: To: Order Line: Schedule Line:

Route Code: Load ID:

Route Group: Location:

Customer ID: TMS ID:

Ship To Customer: Address Number:

Carrier ID: Ship Method:

Priority: To: Parent Product ID:

Item ID: Product ID:

▼ Date/Time Selection

Lead Days/Minutes From: Thru:

Lead Days: Minutes: Until:

Locations Selected By

Picking Rules [Rule Overrides](#) Single Location Only

Default Shipping Location

Specific Location

[Additional Options](#) [Processing Options](#) [View Process Defaults](#) [File Overrides](#)

[Return](#)

ORACLE

Order Release Run Control Setup

Rule Overrides

Use Default Values

Location Option:

Fixed Pick Location

Date Option:

Tiebreaker:

FL Fewest Locations

Shortage Release Option:

Use Partial Quantity Logic

Allow Picking from Containers

Order Unit of Measure

Print Substitutes

Use Fixed Pick Workflow

Role Assignment

Role Name:

Route Control Type:

From Value:

To Value:

OK

Cancel

Refresh

[Return](#)

ORACLE

Order Release Run Control Setup

Additional Options

Order Release Group/Order By						
Sort Order	Ascending	Descending	New Page	New ID	Allow Split	
Order No	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/> Print Kit Header						

Location Summary Option				
	Sort Order	Ascending	Descending	Break
<input checked="" type="radio"/> Picking Plan Only		<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
<input type="radio"/> Location Summary Only		<input type="radio"/>	<input type="radio"/>	
<input type="radio"/> Picking Plan and Loc Summary		<input type="radio"/>	<input type="radio"/>	

Order Release Print Options	
Output Destination Type:	Web
Output Destination Format:	Acrobat (*.pdf)
Output Destination:	
Picking Notes:	Broken Pallet First
Print Pick Quantity Only:	Print All Quantity Fields
Pick Quantity Option:	Use Available Balance
Max Suggest/Sub Locations:	6


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Order Entry Reservation/ATP Messages

Sales Order Messages

Business Unit US001 Order No CEN1133

Messages								Customize	Find	View All	First	1 of 1	Last
Line	Schedule	Demand Line	Product ID	Ship From	Quantity Scheduled	Action	Message	Additional Text					
1	1	1	10039	US010	5.0000	Quantity Ordered	Line partially reserved/promised: 3 out of 5 reserved.						

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ORACLE

Order Entry Reservation/ATP Messages

Sales Order Messages

Business Unit US001 Order No CEN1111

Messages									
Line	Schedule	Product ID	Ship From	Quantity Scheduled	Quantity Promised	Action	Ship Promising	Message	Additional Text
1	1	10000	US010	300000.0000	41853.0000	ATP Decision	<input type="checkbox"/>	Schedule is not fully promised. 41853 may be promised on 2007-11-08. Full amount may be promised on 2007-11-18.	i
2	1	10003	US010	300000.0000	31509.0000	ATP Decision	<input type="checkbox"/>	Schedule is not fully promised. 31509 may be promised on 2007-11-08. Full amount may be promised on 2007-11-18.	i

[Order Entry](#)

[Record Deposit](#)

Header Menu:

[Return](#)

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Alternate Sources of Supply

Input quantity for Alternate Sources you wish to peg. If you don't find appropriate sources, either select Advanced Search or change the Search Criteria and select Search Sources.

Supply Sources Customize | Find | First 1-4 of 4 Last

Sequence	Quantity Requested	Quantity Available	Source Type	Disposition	Inventory Unit	Vendor ID	Vendor Name	Vendor Location	Order Line	Unit Price	Ship Via Code	Lead Day
1	<input type="text"/>	1200.0000	Network	Ship	FRA05					10.000		
2	<input type="text"/>	1200.0000	Network	Ship	US011					10.000		
3	<input type="text"/>	100.0000	Exist PO	Receipt	US010	USA0000001	Bay Area Electric-	1	US001/0000000204 1/1/1	10.000		
4	<input type="text"/>	10.0000	Exist IUT	Receipt	US011				US011/MSR0000002 IN/1/1/1	10.000	COMMON	

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Use Case Two: Shortage Handling

Shortage Workbench “Simple Template” Example

Shortage Workbench

Business Unit: US010	Template ID: SIMPLE_TEMPLATE	View By: Demand Lines View
Selection Criteria		
<input type="checkbox"/> Select Unfulfilled	<input type="checkbox"/> Select Releasable	
<input type="checkbox"/> Exclude Backordered Lines	<input type="checkbox"/> Exclude Pegged Lines	
<input type="checkbox"/> Exclude Fully Reserved Lines	*Filter Unfulfilled Lines: All	
<input type="checkbox"/> Display Shortages Only	Display Unapproved: [dropdown]	
Select by Date: [dropdown]	Selection Date: [text] [calendar icon]	
Source: [dropdown]	Source Bus Unit: [text] [magnifying glass icon]	
Order No: [text] [document icon]	Order Line: [text] [document icon]	
Schedule Line Number: [text] [document icon]	Item ID: [text] [magnifying glass icon]	
Demand Line: [text] [document icon]	Customer ID: [text] [magnifying glass icon]	
Location Code: [text] [magnifying glass icon]	Priority: [text]	
Ship To Customer: [text] [magnifying glass icon]		
Address Sequence Number: [text] [magnifying glass icon]		

[Clear Search Filter](#)

[Return](#)

ORACLE

Use Case Two: Shortage Handling

Shortage Workbench “Simple Template” Setup

Definition | **Permissions**

Template Code: SHORT_WRKBENCH **Last Changed By:** VP1

Template ID: SIMPLE_TEMPLATE **Last Update:** 11/06/07 4:37:31PM

Description: **Active**

Categories Find | View All First ◀ 1 of 1 ▶ Last

***Category:** Demand Lines View **Required** **Default** + -

Subcategories Find | View All First ◀ 1 of 1 ▶ Last

***Search By:** Search **Required** + -

Field List Find First ◀ 1-28 of 28 ▶ Last

Seq Nbr	Field Name	Required	Display	Display Mode	Default From	Default To
<input type="checkbox"/>	1 Select Unfulfilled	<input type="checkbox"/>	1st Column	Edittable	No	
<input type="checkbox"/>	2 Select Releasable	<input type="checkbox"/>	2nd Column	Edittable	No	
<input type="checkbox"/>	3 Exclude Backordered Lines	<input checked="" type="checkbox"/>	2nd Column	Edittable	No	
<input type="checkbox"/>	4 Exclude Fully Reserved Lines	<input checked="" type="checkbox"/>	1st Column	Edittable	No	
<input type="checkbox"/>	5 Exclude Pegged Lines	<input checked="" type="checkbox"/>	2nd Column	Edittable	No	
<input type="checkbox"/>	6 Display Shortages Only	<input checked="" type="checkbox"/>	1st Column	Edittable	No	
<input type="checkbox"/>	7 Filter Unfulfilled Lines	<input checked="" type="checkbox"/>	2nd Column	Edittable		

[Return](#)

Use Case Two: Shortage Handling

Pegging Workbench

Details

Pegging Workbench

Enter peg quantities and push the Save button.

Order Type: Sales Order
Unit: US001 **Order No.:** CEN1147
Order Line: 3 **Schedule:** 1
Item ID: 10018

Inventory Unit: US010
Demand Line: 1

Pegged Quantity

Schedule Date: 11/06/2007
From Date: 11/01/2007 **To Date:** 11/11/2007
 Hide Other Fully Pegged Orders

QTY Order: 10.0000 EA
Total QTY Reserved:
Peg Remaining: 10.0000

[Return to Search](#)

Details								Customize	Find	View All	First	1-2 of 2	Last
Order Type	Order Information	Line	Schedule Date	Hard Peg	QTY Available Remaining	QTY Pegged	Open QTY Pegged	Transfer Links					
Transfer Supply	US011/MSR0000002	IN/1/1/1	11/05/2007	<input type="checkbox"/>	10.0000	0.0000	<input type="text"/>	Req Demand					
Purchase	US001/0000000204	1/1/1	11/06/2007	<input type="checkbox"/>	100.0000	0.0000	<input type="text"/>						

(Menu Path = Inventory/Order Pegging/Workbench)

[Return](#)

Use Case Two: Shortage Handling

Pegging Setup Options

Pegging Setup

Unit: US010

Putaway

Peg Location Lead Days:

Allocate Hard Pegs Allocate Soft Pegs

Workbench Detail Date Range

Starts: days before the header scheduled date

To: days after the header scheduled date

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

(Menu Path = Inventory/Order Pegging/Business Unit Setup)

[Return](#)

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Use Case Two: Shortage Handling

Pegging Security Setup



User Security

User ID: VP1 Default Operator

Demand Order Type

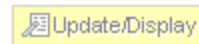
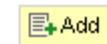
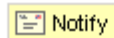
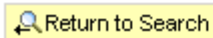
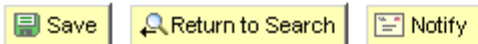
- | | |
|--|---|
| <input checked="" type="checkbox"/> Sales Orders | <input checked="" type="checkbox"/> Stock Requests |
| <input checked="" type="checkbox"/> Work Orders | <input checked="" type="checkbox"/> Transfer Demand |

Supply Order Type

- | | |
|---|---|
| <input checked="" type="checkbox"/> Purchase Orders | <input checked="" type="checkbox"/> Requisitions |
| <input checked="" type="checkbox"/> Production | <input checked="" type="checkbox"/> Transfer Supply |

Peg QTY Putaway/Sourced

- | |
|---|
| <input type="checkbox"/> Allow Change |
| <input checked="" type="checkbox"/> Deny Below Order Complete |



(Menu Path = Inventory/Order Pegging/User Security)

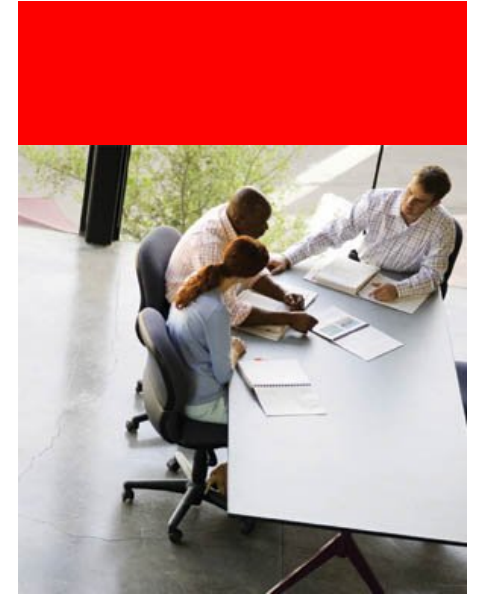
[Return](#)

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Use Case Three

Ship From Unfulfilled State



Use Case Three:

Ship From Unfulfilled State

- Immediate Shipment Bypassing Fulfillment Steps
 - Use Order Release if Pick Ticket is Required
 - Use Front-End Shipping if Pick Ticket not Required



Use Case Three

Order Release: Ship from Unfulfilled State

Process Request Parameters Find | View All First 1 of 1 Last

Process Frequency

Process Once
 Always Process
 Don't Run

*Request ID: 1 Description: Ship From Unfulfilled State

Business Unit: US010 To Business Unit: US010 All Business Units

*Action: Create Allocations *Auto-Processing: Advance to Shipped Auto Pick Option:

Output Options

Picking Plan Picking Extract File Item Usage Labels Language: English

Shipping Order Release Carton Labels

Selection Criteria

Specific Select Unfulfilled Backorders Only
Order Number Select Releasable Export Shipments Only
 TMS Lines Awaiting Upload
 Select Orders

Demand Source: OM Source Unit: US001

Order Number: CEN1092

Date/Time Selection

Lead Days/Minutes From: Thru:
Lead Days: 1 Minutes: Until:

Locations Selected By

Picking Rules [Rule Overrides](#) Single Location Only

Default Shipping Location AREA3 A1 R3 B2

Specific Location

[Return](#)

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Use Case Three:

Ship Using Front-End Shipping

- Use Front-End Shipping Run Control
- Use Front-End Shipping Transaction
 - Use Fulfillment Workbench
 - Or, Use External Transaction



Use Case Three:

Ship Using Front-End Shipping Run Control

- Use Front-End Shipping Run Control
 - Ships requested demand “as is” with no exceptions
 - Error Messages go to Message Log
 - Can setup defaults in Fulfillment Setup
 - Run control data not available after next use

Use Case Three:

Ship Using Front-End Shipping Run Control

Process Request Parameters Find | View All First 1 of 1 Last

Process Frequency

Process Once

Always Process

Don't Run

*Request ID: Description:

Business Unit: To Business Unit: All Business Units

Ship by Date: Date From: Through:

Demand Source: Source Unit:

Order Number: To: Order Line:

*Auto Process: Build Bills of Lading:

Override

Shipping ID:

Ship Date: Ship Time:

Carrier ID:

Ship Via Code:

Freight Terms Code:

Freight Calculate Flag

Pro Number:

Freight Amount: Tracking Number:

Storage Location:

Ship Cntr ID:

From States

Select Unfulfilled

Select Releasable



Use Case Three:

Ship Using Front-End Shipping Transaction

- Can also use the Fulfillment Workbench to generate a Front-End Shipping Transaction
 - Templates used to simplify selection criteria
 - Exceptions allowed...short ship, ship all except...
 - Can automatically process each transaction or setup batch process to run on periodic basis
 - Errors viewed and fixed using Transaction Maintenance Component

Use Case Three:

Ship Using Fulfillment WorkBench

Business Unit: US010 Template ID: BASIC

Action: Search By: Group ID:

Selection Criteria

Select Unfulfilled Select Releasable

Select by Date: Selection Date:

Source: Source Bus Unit:

Order No: Order Line:

Schedule Line Number: Item ID:

Demand Line: Shipping ID:

Carrier ID: Ship Via Code:

Route Group: Route Code:

Customer ID: Location Code:

Ship To Customer: Address Sequence Number:

TMS Reference ID: TMS Line Number:

Load ID: Parent Product ID:

Product ID: Priority:

Customer PO:

[Group Picking/Shipping Default](#)

[Fulfillment Queue](#) [Orders](#) [Demand Lines](#)

[Ship Defaults](#) [Process Default](#)

[Return](#)

Use Case Three:

Transaction Maintenance – View Results

Transaction Maintenance

*Unit: Transaction: Status:

Transaction Details Customize | Find | View All | First 1-2 of 2 Last

EIP Control ID	Trans Code	Description	*Status	Error	Date/Time	User	From
30000000000001290000000001	0365	Request to Ship (front-end)	New	0	06/03/2005 6:24PM	SAMPLE	Page
30000000000001230000000001	0365	Request to Ship (front-end)	Complete	0	11/05/2003 2:47PM	SAMPLE	Page

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