ACTIVANT®

Product and Warehouse Location

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Legal Notices

Activant® Eclipse™ 8.6.3 (Eterm) Online Help System

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Maintenance

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Manual Warehouse Management Overview

The Warehouse Management program tracks inventory from receiving to shipping, along with the equipment used to perform these processes. Use Warehouse Management to do the following:

- Receive and put away material from vendors and other branches.
- Cross dock material.
- Pick and ship material to customers and other branches.
- Work with shipping manifests to aid in shipment delivery.
- Count inventory both to collect a baseline of your inventory and to then ensure that your inventory stays accurate and up-to-date in the system.
- Make inventory adjustments to keep inventory accurate.
- Define and maintain product and warehouse locations.
- Track equipment usage, profits, and costs.
- Control inventory you monitor closely for quality.
- Create price tags for inventory.
- Print bar code labels, ship tickets, and user-defined forms and labels.

See Also:

Manual Warehouse Management Setup Overview

RF Warehouse Management Overview

Product Location Maintenance Overview

Use Product Location Maintenance to track all locations for a selected product. From Product Location Maintenance you can do the following:

- View all locations and location details in which a product is stocked.
- Find open locations in which to stock product.
- Track and record reallocation when product is moved.
- Adjust the product quantities in the system as needed to match actual quantities on the shelf.
- Set a lot or detail lot control type for the product.
- Viewing and edit product location activity.

  Note: Before using Product Location Maintenance, define locations in Zone Maintenance.

When using Product Location Maintenance, you can change the viewable columns to access the following information:

- Date product was last counted.
- Minimum and maximum quantities of product allowed for replenishment.
- Pre-packaged quantities.
- Pallet locations.
- Tote and picker.
- Location and expiration date (FIFO).
- Date the product was last counted and the date it was received.
- Date the product was last received and put away using RF.

  Note: Use the Warehouse Location Maintenance screen to view all products in one location.

See Also:

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Warehouse Location Maintenance Overview

Manual Warehouse Management Overview

Displaying Warehouse Locations for Products

Use Product Location Maintenance to help establish and track multiple stocking locations for a product. In contrast, use Warehouse Location Maintenance to view and track what products are located in each warehouse location.

The Product Location Maintenance screen has different screen views to assist you in tracking the product locations. The views change the right-hand columns' display to show different statistics for the product, such as the home location, pre-packaged quantities, or the last count and expiration date.

Using the Product Location Maintenance screen, you can do the following to display a product's locations:

- Display all the locations for a product.
- Change the location display order.

Display All Locations for Products in the Warehouse

Use the Product Location Maintenance screen to determine all the locations and the quantities in each location for a product in your warehouse.

To display the locations for a product:

1. From the **Whse Mgt** menu, select **Product Location Maintenance** to display the Product Location Maintenance screen.
2. In the **Branch** field, enter the branch for which you want to view product location information.
3. In the **Product** field, enter the product ID preceded by a period, product name, or product catalog number of the product for which you want to view location information. Press **F10** for a list of recently accessed products.

The system populates the rest of the screen with the product and location information for the product, as described below:

Field	Description
Control Type	How the material is tracked, for example, as a detail lot. Press **F10** and select one of the following choices: • **None** - All products are interchangeable and require no individual identification or inspection. • **Lot** - The product is tracked individually or by group, such as a spool of wire or a group of tile from a particular dye batch. When receiving the product, record a lot number so when the product ships, you can identify it with that lot number. Lots can have any quantity from zero. Products with no on-hand amounts do not require lot numbers for a location without inventory. Common lot control products are items such as wire that you cut from a spool and tile that requires color matching. • **Detail Lot** - The product is set up as a detail lot, which allows you to closely monitor manufacturing quality of selected inventory at the lot level. Along with manufacturing information, Detail Lot Maintenance allows you to track the original cost of a product, value of any enhancements, and the current appraised value.
Total On-Hand	The total number of products per unit on-hand in your warehouse.
Ser# Balance	The total number of products that are serialized and on-hand in your warehouse.

Field	Description
T (Type)	The type for the product, such as **S** for stock and **F** for defective. To change the type, press **F10** and select a type. • **S - Stock**. Sellable product available for shipment. • **F - Defective**. Defective product, not available for a normal sale. Defective quantity types have an associated sales order, purchase order, transfer order, or inventory adjustment number in the **Tag ID** column identifying from where the product came. • **O - Over Shipment**. An over shipment from the vendor. Over shipment quantity types have an associated sales order, purchase order, or transfer order number listed in the **Tag ID** column. • **T - Tagged**. The product is committed to the associated sales order, purchase order, transfer order, or inventory adjustment number listed in the **Tag ID** column. The system assigns a tagged type when a product is procured from another branch or vendor. You cannot manually tag an item in the system. • **R - Review**. The product needs reviewing or inspecting. Review quantity types have an associated sales order, purchase order, or transfer order number listed in the **Tag ID** column identifying from where the product came. For example, if the product has a review type, is tagged to a sales order, and shows a quantity, the product was returned. • **L - Display**. Sellable product reserved for display, but available for shipment if specifically requested. Display quantity types have an associated sales order, purchase order, transfer order, or adjustment number listed in the **Tag ID** column that identifies from where the product came. If a display type product is added to a sales order and the quantity requested exceeds the stock available, the system indicates there is also product quantity on display. • **C - Consignment**. Product that is a customer or vendor consignment. The **Tag ID** links the location type with the consignment order. If no consignment location type exists for the customer/vendor, all future transfers or shipments are recorded as a running total for the quantity on the consignment type record for that entity.
Location	The product's location in your warehouse. Location codes identify the physical location in your warehouse where you store the product. For example, your location codes may be XX-XX-XX-XX for a four dimensional locator for zone, row, section, and shelf location, or a description such as South Yard.
Lot/Serial#	The lot ID for the products in this warehouse location, if the product is lot controlled. Lot controlled products have a control type of Lot in the Control Type area. If the product requires serial numbers, the serial number of the products in this location. Select Serial Queue from the Inquiry menu to set the serial numbers for the product. **Note:** The system limits this field display to 15 characters.
Tag ID	The sales order, purchase order, transfer order, or adjustment number for types other than Stock. The tag ID only displays when stock in the location is associated with an order. If the location holds vendor consignment inventory, the vendor name displays in this field.
On Hand	The on-hand quantity of the product at the matching location. Any change to a quantity assigned to a location results in a posting to Inventory Adjustments noted with a Locations Adjustment comment, regardless of whether the overall on-hand quantity changed.

Field	Description
UM	The unit of measure for the product quantity, for example, each (ea).
S (Status)	The location status for the product: • **Primary** – First location to stock the product. • **Secondary** – Backup location when the primary location is full. • **Floating** – Temporarily assigned location that is used only until supply in that location reaches zero quantity. • **Remnant** – Location for material that contains less than the original amount. For example, half a spool of wire. For more information about remnants, see Assigning Products a Remnant Location Status. • **In Process** – Processing location that cannot be changed.

Note: Additional fields may be available depending on the view you are using.

4. Press **Esc** to save changes and exit the screen.

Changing the Location Display Order

You may have a product that has multiple serial numbers or lots, or that you store in multiple locations in your warehouse, creating a lengthy locations list for a product. Change the display order in the Product Location screen for locations that fall at the bottom of the list, that you access or monitor frequently. Changing the display order allows you to place the locations you access or monitor through this screen frequently to the top of the list so you do not have to scroll through the list to find them.

To change the location display order:

1. Display the locations for a product.
2. Move your cursor to the line item you want to move.
3. Use the **Move Ln** hot key and move your cursor to the line to which you want to move the selected line item.
4. Press **Enter**.

   The line item for the location moves to the new location.
5. Press **Esc** to save your changes. The next time you use the Product Location Maintenance screen to view the locations, the locations display in the new order.

More Options from the Product Location Maintenance Screen

The Product Location Maintenance screen also offers these options.

Hot Key	Function
Fut Ldgr	Displays the Future Ledger screen. Use this screen to view the product's future activity, such as committed sales orders.
Hist Ldgr	Displays the History Ledger screen. Use this screen to view every transaction for the product that resulted in the current on-hand quantity.

Hot Key	Function
Inv Inq	Displays the Inventory Inquiry screen. Use this screen to view up-to-the-minute product inventory data.
View Tag	Displays the purchase order, sales order, transfer order, or return to which the product is attached, if any.
Actv Log	Displays the product's activity log.
View	Displays the Views screen. Use this screen to change the Product Location Maintenance view
Serial #	Displays the Serial Number Entry screen. Use this screen to list or assign available serial numbers for the product in the location selected by your cursor in the Product Location Maintenance screen.
DetLots	Displays the Detail Lot screen. Use this screen to view the detail lots tied to the product

See Also:

Changing Product Locations

Changing Product Quantities

Displaying Products in Warehouse Locations

Product Location Maintenance Overview

Finding Open Locations in Your Warehouse

As you are receiving products, you may have new products or overflow products that do not have an assigned location in your warehouse. Use the Product Location Entry screen to find open locations, or locations that might have additional space. You can also use this screen to create and delete locations in your warehouse.

To find open locations in your warehouse:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Product Location Entry** to display the Product Location Entry screen.
2. In the **Br** field, enter the branch at which you are looking for an open location.
3. In the **Location** field, press **F10** and select a location.

   Note: Select **New** from the list to create a new location for a product and enter the location ID at the **Enter New ID** prompt.

   The number of different items in the location displays at the bottom of the screen.
4. Use the **Products** hot key to view the products that are currently assigned to the location.

   If your authorization level in the PRD.LOCATION.MAINT authorization key is less than level 2, you can only view products in an location using the **Products** hot key. You cannot delete a location.
5. Use the **Delete** hot key to delete a location from the system. If any item in that location has an on-hand quantity, the system does not allow you to delete the location.
6. Press **Esc** to save your changes and exit the screen.

See Also:

Displaying Warehouse Locations for Products

Product Location Maintenance Overview

Changing Product Locations

Changing inventory and status in your warehouse may require you to update your original product locations. Use the Product Location Maintenance screen or the Warehouse Location Maintenance screen to update product location information as it changes.

> **Note:** Before using Product Location Maintenance, define locations in Zone Maintenance.

This topic provides procedures for changing or viewing product locations using the Product Location Maintenance screen for the following:

- Add a location for a product
- Location type
- Last count date
- Replenishing min/max quantities
- Home locations
- Pre-packaged quantities
- Tote and pickers (view only)
- Pick status
- Expiration date
- Received date
- RF put sway date and time
- Review location status

To change product locations using the Warehouse Location Maintenance screen where you can view all products in a single location at one time, see Maintaining Locations from Warehouse Location Maintenance.

To add a location for a product:

1. From the **Whse Mgt** menu, select **Product Location Maintenance** to display the Product Location Maintenance screen.
2. In the **Branch** field, enter the product's branch or territory number.
3. In the **Product** field, enter the product ID and press **Enter**.
4. In the **Type** field, update the location type for the product. Press **F10** to select from the following types:

Type	Description
S	Stock

Type	Description
F	Defective
O	Over-shipment
R	Review
L	Display
T	Tagged
C	Customer Consignment

5. In the **Location** field, enter the new location and press **Enter**.

   You can enter locations other than the primary location for the product, such as secondary and floating locations.

   Note: If you perform any update to a location holding tagged product, the system copies the update to the purchase or transfer order on which the product was originally received.

6. In the **S** field, press **F10** and select one of the following location status types:

Type	Description
P	**Primary** - First location to stock product.
S	**Secondary** - Backup location when primary location is full.
F	**Floating** - Temporarily assigned location that is used only until supply in that location reaches zero quantity.
R	**Remnant** - Location for material that contains less than the original amount. For example, half a spool of wire. For more information about remnants, see Assigning Products a Remnant Location Status.
I	**In Process** - Processing location that cannot be changed.

7. Press **Esc** to save your changes and return to the previous screen.

Changing the Location Type for a Product

Use the Product Location Maintenance screen to indicate a location type for the product. For example, you may store some products in multiple locations in your warehouse, one that is considered the primary location, and one that is considered a remnant location. At times, you may need to change the location type for a product. For example, if you sold 400 feet of wire from a 500 foot spool in location WR-01-01-02, you may want to change the location type for WR-01-01-02 to indicate that the remaining 100 feet of wire in that location is a remnant.

To change the product location type:

1. Display the locations for a product.
2. Move your cursor to the location you want to change.

3. In the **S** (Location Status) field, press **F10** and select the new location type this location serves for the product:

Type	Definition
P	Primary - First Location to stock the product.
S	Secondary - Backup location when the primary location is full.
F	Floating - Temporarily assigned location used only until supply in that location reaches zero quantity.
R	Remnant - Location for material that contains less than the original amount. For example, half a spool of wire.

4. Press **Esc** to save your changes.

Changing the Last Count Date

From the Product Location Maintenance screen, use the **View** hot key to display the **Last Count** field, which shows the date the product was last counted in the warehouse location. Using the **View** hot key also displays the **Location Pick Status** field, which when using Detail Lot picking or receiving, displays the location from where the product is picked or put away first.

After changing the last count date, the system updates the Product Activity Log by indicating that the product and location were counted. The system displays the previous count quantity and current count quantity in the log.

To change the last count date:

1. Display the locations for a product.
2. Use the **View** hot key.
3. Select **Last Count / Location Pick Status** from the selection list.
4. In the **On-Hand** field, enter the quantity for the location.

   If the count is the same as the last count, then re-enter that amount.

   The system updates the **Last Count** field with the current date.
5. Press **Esc** to save your changes.

Changing the Replenishment Quantities

You can change the minimum and maximum quantities of product allowed at a location. Use the minimum quantity to produce suggested replenishment reporting that advises you to move stock to locations running low on inventory. Use the maximum quantity to determine what is available to replenish other locations that are below minimum quantities. Any quantity over the maximum quantity is available for replenishment.

To change the replenishment minimum and maximum quantities:

1. Display the locations for a product.
2. Use the **View** hot key.
3. Select **Replenish Min / Max Qtys** from the selection list.
4. In the **Min Qty** and **Max Qty** fields, update the values as needed. Press **F10** for list of quantity options.
5. Press **Esc** to save your changes.

Changing the Home Location

Home locations define where the item belongs after handling and are used in combination with the Detail Lot control.

To change the home location:

1. Display the locations for a product.
2. Use the **View** hot key.
3. Select **Home Location** from the selection list.
4. In the **Home Location** field, enter the location where the item belongs after handling.
5. Press **Esc** to save your changes.

Changing the Pre-Packages Quantities

Pre-packaged quantities are for products that are sold together, such as kits or a box of nails.

To change the pre-packaged quantities:

1. Display the locations for a product.
2. Use the **View** hot key.
3. Select **Pre-Package Qtys** from the selection list.
4. In the **Pre-Pack Qty** field, enter the package quantity assigned for the product.
5. Press **Esc** to save your changes.

Viewing the Tote and Picker

The tote and picker identifies the physical basket or cart used to collect items from the warehouse to fill an order or to put away product. The picker is the person pulling product from the shelf to place in the basket.

To view the tote and picker for the product:

1. Display the locations for a product.
2. Use the **View** hot key.

3. Select **Tote / Picker** from the selection list.
4. In the **Tote** field, enter the tote you want to view.
5. In the **Picker** field, enter the picker who picks products from this warehouse location.
6. Press **Esc** to save your changes.

Assigning or Changing the Pick Status

The pick status identifies the pick priority for the location. For example you may have two overflow locations for a product in your warehouse. You can assign a higher pick priority to the overflow location you want depleted first. The **Pick Status** field is only accessible in RF-enabled branches.

To assign or change the pick status:

1. Display the locations for a product.
2. Use the **View** hot key and select **Last Count / Location Pick Status**.
3. In the **PickStat** field, press **F10** and select the pick order for the location.

   Note: If pick statuses are not defined in the RF Valid Product Loc Pick Statuses control maintenance record, enter a free-form status.

4. Press **Esc** to save your changes.

Changing the Expiration Date

The Expiration Date view displays the date the product in the warehouse location expires, if it is a perishable product. If the Use Location Expiration Dates control maintenance record is set to **Y**, the system directs pickers to pick from locations with the earliest expiration date. For orders with quantities greater than the earliest expiration date location, the system directs the picker to start the process from the location with the earliest expiration date. Then, to pick from the location with the next earliest expiration date continuing until the order is filled.

To change the last count expiration date:

1. Display the locations for a product.
2. Use the **View** hot key.
3. Select **Last Count / Exp Date** from the selection list.
4. In the **Last Cnt** field, enter the updated cycle count date.
5. In the **Exp Date** field, enter the expiration date, if any.
6. Press **Esc** to save your changes.

Changing the Received Date

The Received Date view displays the date the product was received into inventory. When a receiver receives product into inventory, the system stores the receive date in Product Location Maintenance and in Warehouse Location Maintenance.

To change the received date:

1. Display the locations for a product.
2. Move your cursor to the location whose product receive date you want to change.
3. Use the **View** hot key and select **Last Count / Recv Date** to display **Rcvd Dt** field.
4. In the **Rcvd Dt** field, enter the new received date for the product in this location.
5. Press **Esc** to save your changes.

Viewing the RF Put Away Date and Time

Use the RF Put Away Date and Time view to determine when an item was scanned and put away at a location in an RF warehouse environment.

To view the RF put away date and time:

1. Display the locations for a product.
2. From the **Change View** menu, select **RF Put Away Date / Time** to display the following fields:

Field	Description
RF Put Away Date	The date the product was scanned and put away in the location.
Time	The time the product was scanned and put away in the location.

3. Press **Esc** to save your changes.

Viewing the Review Location Type

Use the Review Type and Original Type view to determine the location status for a Review stock item. For example, a review stock type can mean that an item is in a review status due to a pending cycle count, or that the item is in the Return Goods Queue, waiting for review before being returned to your inventory or to your vendor. If you are using RF and the RF Make Short Pick a Review Status Location control maintenance record is set to **Yes**, when attempting to pick from a location with a shortage, the system queues the product location for a cycle count and changes the stock in the location to the Review status.

To review the review location status:

1. Display the locations for a product.

2. Use the **View** hot key and select **Last Count / Review Type / Original** to display the following additional view-only fields:

Field	Description
Type	The review status type for product locations assigned the Review type in the **T (Type)** field. **Cycle** displays if the product location is queued for a cycle count. If a type does not display in this field for Review status line items, the product in the location is in the Return Goods Queue, waiting review for return to your inventory or to the vendor.
Old	The original location type for this product, such as Stock or Nonstock. When you either complete the cycle count for the location or review the product and remove it from the Return Goods Queue, the location returns to this status.

3. Press **Esc** to save your changes.

See Also:

Changing Product Quantities

Displaying Warehouse Locations for Products

Product Location Maintenance Overview

Changing Product Quantities

When you move product from one location to another, such as from the warehouse to the sales floor, use Product Location Maintenance to track the reallocation. For example, reallocate product if a salesperson on the showroom floor has just sold the last item of a product and needs to replenish that item on the floor.

Adjust product quantity if, for example, the system indicates that 15 items are on Shelf A, but only 10 items are actually on Shelf A. Add this product to the next cycle count to reverify the product's quantity.

> **Note:** The system deducts any outgoing inprocess quantities from the location onhand quantities displayed.

Always make adjustments in Product Location Maintenance so that your inventory counts stay accurate and current. If you create new locations in Product Location Maintenance, press **Esc** to save the new location.

You cannot increase tagged quantities using Product Location Maintenance. To increase tagged quantities in locations, either use the RF Move Product functionality to move additional quantity into the location or increase the sales order quantity for the tagged item to generate a pick request. If you perform any other update to a location holding tagged product, the system copies the update to the purchase or transfer order on which the product was originally received.

Through the PRD.LOCATION.MAINT authorization key, you are assigned one of three levels of authority for changing product locations:

- Level 1 authority is view-only mode. You cannot make changes.
- Level 2 authority allows reallocation of product between locations, without changing the total on-hand quantity. Users with level 2 authority cannot adjust customer consignment quantities. However, level 2 authorized users can move quantities between same vendor consignment locations.
- Level 3 authority allows reallocation of the product and adjustment of the total on-hand product quantity.

Use Warehouse Location Maintenance to view all the products in a warehouse location.

This topic discusses how to update product quantities in the following circumstances:

- If you have level 2 authority.
- If you have level 3 authority.
- By editing the purchase order.

To change product quantities with level 2 authority:

1. From the **Whse Mgt** menu, select **Product Location Maintenance** to display the Product Location Maintenance screen.

2. In the **Branch** field, enter the branch or territory for which you want to view product location information.
3. In the **Product** field, enter the product name or ID for the product for which you want to view location information.

   The system displays the product's locations and on-hand quantities. In addition, you can use the **View** hot key to change the columns displayed.
4. In the **Location** field, identify the location from which you are moving the product.

   Note: If you perform any update to a location holding tagged product, the system copies the update to the purchase or transfer order on which the product was originally received.
5. In the **On Hand** field next to the location from which you are moving product, enter the number of items that *remain* in that location.

   For example, if the original quantity in the location was 100 and you move 20 items from the location, enter **80** in the **On-Hand** field for the location.

   Note: If the **Enable Product Location UOM** control maintenance record is set to **Y**, you can edit the value in the **UM** column for the quantity as needed. If the Enable Product Location control maintenance record is set to **N**, the system populates the **UM** column with the unit of measure defined for the product in Product Maintenance, and you cannot edit the value in the **UM** column.
6. Place the cursor on the location to which you are moving the product and press **Enter**.

   The system adjusts the numbers accordingly in the locations.
7. Press **Esc** to save your changes.

To change product quantities with level 3 authority:

1. From the **Whse Mgt** menu, select **Product Location Maintenance** to display the Product Location Maintenance screen.
2. In the **Branch** field, enter the branch or territory for which you want to view product location information.
3. In the **Product** field, enter the product name or ID for the product for which you want to view location information.

   The system displays the product's locations and on-hand quantities. In addition, you can use the **View** hot key to change the columns displayed.
4. In the **Location** field, identify the location from which you are moving the product or adjusting the product quantity.

   Note: If you perform any update to a location holding tagged product, the system copies the update to the purchase or transfer order on which the product was originally received.

5. In the **On Hand** field next to the location from which you are moving product, enter the number of items that *remain* in that location.

   For example, if the original quantity in the location was 100 and you move 20 items from the location, enter **80** in the **On-Hand** field for the location.

   Note: If you are moving the quantity from a different location, identify where you are moving product in the **Location** field.

6. In the **On Hand** field next to the location to which you are moving product, add the number of items that you are moving *to* that location to the existing quantity.

   For example, if you are moving 20 items to a location with 40 items, enter **60**.

   Note: If the **Enable Product Location UOM** control maintenance record is set to **Y**, you can edit the value in the **UM** column for the quantity as needed. If the Enable Product Location control maintenance record is set to **N**, the system populates the **UM** column with the unit of measure defined for the product in Product Maintenance, and you cannot edit the value in the **UM** column.

7. Add the product to the next cycle count to make sure your inventory stays accurate.
8. Press **Esc** to save your changes.

To change product quantities by editing the purchase order:

1. From the **Purch** menu, select **Purchase Order Entry** to display the Purchase Order Entry screen.
2. In the **Ship From** field, enter the purchase order number and select the generation, if necessary.
3. Place your cursor on the product for which to change the location and use the **Sched-Off** or **Sched-On** hot key to display the Scheduler screen.
4. Select the received date for which you want to change the product location.
5. Use the **Split Location** hot key to display the Split Locations screen.
6. In the **Qty** field for the original location, enter the number of items that *remain* in that location.

   For example, if the original quantity in the location was 100 and you move 20 items from the location, enter **80** in the **On-Hand** field for the location.

7. In the **Location** field on a new line, enter the new location for the product.
8. In the **Qty** field for the new location, enter the number of the item you are relocating.

   Note: The total quantity entered must equal the received quantity.

9. Repeat steps 6 through 8 for additional locations for this product.
10. Press **Esc** to save the split locations information and return to the Scheduler screen.

See Also:

Changing Product Locations

Displaying Warehouse Locations for Products

Displaying Products in Warehouse Locations

Product Location Maintenance Overview

Moving Vendor Consignment Inventory

Using Product Location Maintenance, you can move consignment inventory you are storing for a vendor to a different location in your warehouse. You must be assigned the PRD.LOCATION.MAINT authorization key at level 2 or higher to move products using Product Location Maintenance.

To move vendor consignment inventory:

1. From the **Whse Mgt** menu, select **Product Location Maintenance** to display the Product Location Maintenance screen.
2. Display all the locations for a product.

   Vendor consignment locations are indicated by the vendor name and the location type **C** in the **Tag ID** field.
3. In the **On-Hand** field of the location from which you are moving inventory, decrease the quantity by the number of items you are moving.
4. Select the location to which you want to move the on-hand quantity.
   - If you select a location to increase that is also a vendor consignment location tagged to the same vendor, the system increases the on-hand quantity by the quantity you subtracted from the first location.
   - If you selected a location to increase that is either not a vendor consignment location or that is a vendor-consigned location tagged to a different vendor, the system creates a new location line with the difference in quantity. The system keeps the vendor tagged to the original location and only changes the actual location number to the one you selected to increase.
   - If you want to move the inventory to a new location not available on the Product Location Maintenance screen for the product, you can move the consigned inventory to a blank line on the screen. The system copies all the location information from the original location, except the actual location number. Enter the location number for the new location.
5. Press **Esc** to save your changes and exit the screen.

See Also:

Displaying Warehouse Locations for Products

Receiving Consignment Purchase Orders in a Manual Warehouse

Product Location Maintenance Overview

Assigning Products a Remnant Location Status

The system automatically assigns a pick location for products on sales orders according to the warehouse locations defined in Product location Maintenance for the product. You may however, decide to change the location status for a product to identify it is a remnant.

For example, your purchasing agent purchased and received two spools of wire containing 500 feet each into two separate warehouse locations: W1 (Primary location) and W2 (Secondary location). A sales agent takes an order for 450 feet of wire. The system assigns the pick location for the product to W2, the secondary location, thus leaving 50 feet of wire at W2. Your company may consider any wire length less than 100 feet to be a remnant that gets bundled and moved to a remnant location in your warehouse.

When selling lot controlled products, the system first looks at remnant locations to determine if it can fill an order with the quantity in that location. If the order quantity is less than the remnant, the system assigns the remnant as the pick location.

For example, if you assign the remaining 50 feet of wire at W2 to a remnant location, and your sales agent now takes an order for 40 feet of wire, the system assigns W2 as the pick location for the product because the amount in the remnant location can fill the entire order quantity. However, if your sales agent takes an order for 55 feet instead of 40 feet, the system assigns W1 as the pick location, because the remnant quantity of 50 feet at W2 does not fill the order quantity.

> **Note:** The remnant location status is typically used for lot controlled products, such as wire and tile.

To assign a product a remnant location status:

1. From the **Whse Mgt** menu, select **Product Location Maintenance** to display the Product Location Maintenance screen.
2. In the **Branch** field, enter the branch or territory where the product is located.
3. In the **Product** field, enter the product for which you want to assign a remnant status.
4. Press **Enter** to display all the locations for the product at the indicated branch.
5. Place your cursor on the location you want to change to a remnant.
6. In the **S** field, type **R** to indicate the location is for a remnant.
7. Press **Esc** to save your changes.

See Also:

Changing Product Quantities

Product Location Maintenance Overview

Defining and Selling Lot Control Products

You may have products in your warehouse that you need to track individually or by group, such as wire or tile. Assigning a lot control type and a lot number to a product location helps you track these types of items and their quantities.

For example, you order wire in large spools and cut the wire to meet the specifications on a sales order. You need to track the amount of wire left so you know at all times what the remaining quantity is on a spool. If you stock tile, the tile manufacturer ships you tile from a specific dye batch or dye lot. The manufacturer may not guarantee that colors in other tile shipments will be the exact same shade, therefore, use lot numbers to help group the tile from a dye batch.

This topic provides information about the following:

- Defining product locations as lot controlled.
- Selling lot controlled products.

Defining Product Locations as Lot Controlled

Use Product Location Maintenance to set a location for a product as lot controlled.

To define a product location as lot controlled:

1. From the **Whse Mgt** menu, select **Product Location Maintenance** to display the Product Location Maintenance screen.
2. In the **Branch** field, enter the branch where you store the product.
3. In the **Product** field, enter the product ID preceded by a period, product name, or product catalog number of the product for which you want to assign a lot control type. Press **F10** for a list recently accessed products.

   The system populates the rest of the screen with the product and location information as described in Displaying Warehouse Locations for Products.
4. In the **Control Type** field, press **F10** and select **Lot**.
5. In the **Lot/Serial#** field, enter the lot ID number for the product.

   Note: Products with no on-hand amounts do not require lot numbers for a location without inventory.
6. Press **Esc** to save your changes.

Selling Lot Controlled Products

When selling lot controlled products, the system checks the locations assigned in Product Location Maintenance for the best possible pick based on the location that can fill the order with the least amount of quantity left over, including remnant locations.

For example, you have two warehouse locations assigned for one type of wire, W1 (Primary location) and W2 (Secondary location). W1 currently has 400 feet of wire on hand and W2 has

100 feet of wire on hand. Your sales agent takes an order for 90 feet of wire. The system assigns W2 as the pick location for the product because the amount in that location can fill the entire order quantity. If W2 was assigned a remnant or a floating location status, the system would still assign it as the pick location for the order because the quantity in that location meets the order requirements. For more information about remnant locations, see Assigning Products a Remnant Location Status.

When your sales agent adds a lot controlled product to a sales order, the system displays a box indicating the locations in the warehouse where you store the product and the quantities available. It lists the location it is going to pick from at the top of the list. You can assign a different pick location to the order. For more information, see Assigning Pick Locations in a Manual Warehouse.

See Also:

Assigning Products a Remnant Location Status

Assigning Pick Locations in a Manual Warehouse

Changing Product Locations

Product Location Maintenance Overview

Viewing Product Activity Logs

When a change is made to a product or location, the system generates a log entry and adds it to the Product Activity Log. You can also append additional entries to the log, as necessary.

Use the Product Activity Log Viewing screen to view and update entries for product activity. The following authorization keys determine whether you can view and edit activity log entries:

- PRD.ACTIVITY.CMT.EDIT
- PRD.ACTIVITY.EDIT
- PRD.ACTIVITY.VIEW

The BR.COST.ACTIVITY.VIEW authorization key determines whether you can view branch cost information in the Product Activity Log.

To view product activity:

1. From the **Whse Mgt** menu, select **Product Location Maintenance** to display the Product Location Maintenance screen.
2. In the **Branch** field, enter the branch where the product resides.
3. In the **Product** field, enter a product to view. Press **F10** for a list of products from which to select.
4. Use the **Actv Log** hot key to display the Product Activity Log Viewing screen.

   Note: You can access the Product Activity Log Viewing screen from other system screens, such as the Inventory Inquiry screen, by using the appropriate **Log** hot key.

   The system displays the following information:

Field	Description
Br	The branch to which the product you are viewing belongs.
Desc	The description of the product.
UserID	The user who made the change to the product.
Date	The date the change was made.
Time	The time the change was made.
Comment	The comment the user entered when they made the change to the product or a system-generated comment for product activity.

5. Press **Esc** to exit the screen.

More Options from the Product Activity Log Viewing Screen

The Product Activity Log Viewing screen also offers these options.

Hot Key	Function
View	Displays the transaction attached to the product activity entry in view-only mode.
Edit	Displays the transaction attached to the product activity entry in edit mode.
Sel	Displays a selection criteria screen. Use this screen to search for a product activity entry by entering selection criteria.
New	Displays the Product Activity Log Entry screen. Use this screen to enter a new log entry for the product and date displayed.
Edit Item	Displays the Product Activity Log Entry screen. Use this screen to edit the selected log entry.
Append	Displays the Append Message screen. Use this screen to append a message to the original log entry.
Expand	Displays all comments in their entirety.
Synop	Displays only the first line of each comment.
UserQ	Displays the user job queue for the user ID of the selected entry.
JobQ	Displays the Call Tracking Entry screen. Use this screen to create a tracker for the user, customer, or vendor to whom the product activity applies.
Type	Displays the Comment Types screen. Use this screen to limit the type of product activity entries that display one of the following: • **Branch Costs** • Location & RF • All **Note:** You must have the BR.COST.ACTIVITY.VIEW authorization key defined to view Branch Costs.

See Also:

Creating and Editing Product Activity Log Entries

Product Location Maintenance Overview

Activity Logs Overview

Creating and Editing Product Activity Log Entries

Use the Product Activity Log Entry screen to create or edit Product Activity Log entries. If you want to edit an entry, the original comment displays on the Product Activity Log Entry screen as a reference for your updates. You can also append a new comment to the original entry.

If you want to create a new comment, enter the comment in the Product Activity Log Entry screen. The system displays your new comment on the Product Activity Log Viewing screen.

The following authorization keys determine whether edit activity log entries:

- PRD.ACTIVITY.CMT.EDIT
- PRD.ACTIVITY.EDIT

To purge activity log entries, see Purging Activity Logs.

To create or edit a product activity log entry:

1. From the **Whse Mgt** menu, select **Product Location Maintenance** to display the Product Location Maintenance screen.
2. In the **Branch** field, enter the branch where the product resides.
3. In the **Product** field, enter a product to view. Press **F10** for a list of products from which to select.
4. Use the **Actv Log** hot key to display the Product Activity Log Viewing screen.

   Note: You can access the Product Activity Log Viewing screen from other system screens, such as the Inventory Inquiry screen, by using the appropriate Log hot key.

5. Use the **New** hot key to display the Product Activity Log Entry screen.

   If you are editing a comment, place the cursor on the comment you want to edit and then use the **Edit Item** hot key to display the Product Activity Log Entry screen.

6. Verify the following information:

Field	Information
Desc	The product description.
Br	The branch to which the product belongs.
Entered	The current date, current time, and your user ID.
Source	If applicable, the original comment.
Sec Level	Your security level.

7. In the **Comment** field, enter or edit the comment.
8. Press **Esc** to save your changes and exit the screen.

More Options from the Product Activity Log Entry Screen

The Product Activity Log Entry screen also offers these options.

Hot Key	Function
View	Displays the transaction or record attached to the product activity entry.
Append	Displays the Append Message screen. Use this screen to append a message to the original log entry.
Print	Prints the comment.

See Also:

Viewing Product Activity Logs

Purging Activity Logs

Product Location Maintenance Overview

Activity Logs Overview

Warehouse Location Maintenance Overview

Due to changing inventory and status, you may find it necessary to view and update products contained in a single location in your warehouse. Use Warehouse Location Maintenance to view all products contained in one warehouse location. In contrast, use Product Location Maintenance to see all locations for one product.

The Warehouse Location Maintenance screen displays zone information, along with other location details assigned in Zone Maintenance. It also has different views to assist you in tracking products at locations. Use these views to maintain current location information, such as the home location, pre-packaged quantities, or the last count and expiration date.

The following topics discuss how to use Warehouse Location Maintenance in maintaining individual warehouse locations:

Displaying Products in Warehouse Locations

Maintaining Locations from Warehouse Location Maintenance

See Also:

Product Location Maintenance Overview

Manual Warehouse Management Overview

Displaying Products in Warehouse Locations

Use the Warehouse Location Maintenance screen to display all products, quantities, and location detail information for a single location in your warehouse.

To display all the products in a warehouse location:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. In the **Branch** field, enter the location's branch number.
3. In the **Location** field, enter the location for which you want to view products, and press **Enter**.

   A location can be a number, a letter, or an area such as a Showroom or Yard.

   Note: If you use Zone Maintenance and enter a location that is outside the Zone Maintenance parameters, answer **Yes** at the prompt indicating the location is invalid based on the zones defined.

4. Review the following location and product information:

   Note: Use the **Chng View** hot key to access different columns of information.

Field	Description
Zone *	Zone assigned to the location.
Pick Group *	Pick group assigned to the location.
Req Qty *	Whether the zone is picked only after other areas have been picked for the same product. For example, your showroom (**S** zone) is set up to be picked only after product has been picked from all other areas of your stock.
Yrd Tkt *	Whether a yard ticket prints for the zone when orders placed involve that zone.
Exclude Pick Queue *	Whether the zone is excluded from RF picking.
Exclude Stage Loc *	Staging location for the zone if it is excluded from RF picking but included in RF system-directed loading.
Sort Prefix *	Pick sequence for the pick group that determines the put away and picking sequences for warehouse navigation.
Sort Order *	Order in which the zone is picked: • **A** (ascending) – The zone is picked from its beginning location to its ending location. • **D** (descending) – The zone is picked from its ending location to its beginning location.
Product Desc	Products stocked in the location.

Field	Description
T	One of the following quantity types for product in the location. • **S** – Stock • **D** – Defective • **O** – Over Shipment • **R** – Review • **L** – Display • **T** – Tagged • **C** – Customer Consignment
S	One of the following location types for the product in the location: • **P** – Primary • **S** – Secondary • **F** – Floating • **R** – Remnant • **I** – In Process
On-Hand	On-hand quantity of the product in the location.
Lot/Serial#	Lot number or serial number assigned to the product in the location.
Tag ID	Order to which the product in the location is tagged, if it is tagged to an order.
Last Count	Date on which the product was last counted in the location.
Receive Date	Date the product was received into the location
Expire Date	Date the product in the warehouse location expires, if it is a perishable product.
Home Location	Location where the product belongs after handling.
Pre-Pack Qty	Pre-packaged quantity for products that are sold together, such as kits or a box of nails.
PickStatus	Pick priority for the location. For example you have two overflow locations for a product in your warehouse. You can assign a higher pick priority to the overflow location you want depleted first.
Type	Review status assigned to the product if the product is assigned a **R – Review** type in the **T** field.
Old	Original quantity type for the product in the location, such as Stock or Nonstock.
Min Qty	Minimum amount of quantity for the product to stock in the location.
Max Qty	Maximum amount of quantity for the product to stock in the location.
Tote	Tote and picker transporting the product from the location.

*** These parameters are assigned to locations in Zone Maintenance.**

5. Press **Esc** to exit the location.

To determine if a product is also in another warehouse location:

1. Display all the products in a location.

2. Place the cursor on the line with the product for which you want to view additional location information.
3. Use the **Prd Loc Maint** hot key to display the Product Location Maintenance screen.

   The **Location** field displays additional locations for the product.
4. Press **Esc** to return to the Warehouse Location Maintenance screen.

See Also:

Maintaining Locations from Warehouse Location Maintenance

Warehouse Location Maintenance Overview

Maintaining Locations from Warehouse Location Maintenance

Use Warehouse Location Maintenance to maintain up-to-date location information, such as the date a product was last cycle counted at the location. You can update and view the following information for products stocked in the location from Warehouse Location Maintenance:

- Quantity and location types
- Last count date
- Replenishment quantities
- Home locations
- Pre-package quantities
- Totes and pickers
- Pick statuses
- Expiration dates
- Receive dates
- Review location types

For additional tasks you can complete from Warehouse Location Maintenance, see More Options from the Warehouse Location Maintenance Screen.

Changing Quantity and Location Types for Products

You can use the Warehouse Location Maintenance screen to indicate what quantity and location type this location serves for each product. For example, for some products, the location may be the primary location. For other products, the same location may serve as that product's secondary, back-up location.

To change a product's quantity and location type:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. Display all the products in a location.
3. Move your cursor to the product description whose quantity or location type you want to change.
4. In the **T** (Type) field, press **F10** and select a new quantity type for the product:

Type	Definition
S	**S - Stock**. Sellable product available for shipment.
F	**F - Defective**. Defective product, not available for shipment.
O	**O - Over Shipment**. Over shipment from the vendor.
R	**R - Review**. Product that needs reviewing or inspecting before it is sellable.
L	**L - Display**. Sellable product reserved for display, but available for shipment if specifically requested.
T *	**T - Tagged**. Product committed to the associated sales order, purchase order, transfer order, or inventory adjustment number listed in the Tag ID field.
C *	**C - Consignment**. Product that is a customer or vendor consignment.

*** You cannot manually assign these quantity types to products from Warehouse Location Maintenance.**

5. In the **S** (Location Status) field, press **F10** and select a new location type for the product:

Type	Definition
P	Primary - Main stocking location for the product.
S	Secondary - Back up stocking location for the product when primary location is full.
F	Floating - Temporary stocking location for the product until supply in that location reaches zero quantity.
R	Remnant - Stocking location for material that contains less than the original amount. For example, half a spool of wire.

6. Press **Esc** to save your changes.

Changing Last Count Dates

The last count date indicates the last time you performed a cycle count for a product in a location. After you change the last count date for a product, the system updates the Product Activity Log by indicating that the product and location were counted.

To change a product's last count date:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. Display all the products in a location.
3. Move your cursor to the product description of the product whose last count date you want to change.
4. In the **Last Count** field, enter the month, day, and year the product was last counted at this location.
5. Press **Esc** to save your changes.

Changing Replenishment Quantities

You can use the Warehouse Location Maintenance screen to set the minimum and maximum quantities of a product allowed at the location for replenishment.

To change a product's replenishment quantities:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. Display all the products in a location.
3. Use the **Chng View** hot key and select **Replenish Min / Max** to display the Replenish Min/Max view.
4. In the **Min Qty** field, enter the minimum number of this product to stock at location for replenishment purposes.

5. In the **Max Qty** field, enter the maximum number of this product to stock at this location for replenishment purposes.
6. Press **Esc** to save your changes.

Changing Home Locations

Home locations define where products are to be stocked after handling, and they are used in combination with detail lot controls set up for products in Product Location Maintenance.

To change a product's home location:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. Display all the products in a location.
3. Use the **Chng View** hot key and select **Last Count / Home Location** to display the Last Count/Home Location view.
4. In the **Home Location** field, change the listed home location, if necessary.
5. Press **Esc** to save your changes.

Changing Pre-Package Quantities

Pre-packaged quantities are set for products that are sold together, such as kits or a box of nails.

To change a product's pre-package quantities:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. Display all the products in a location.
3. Use the **Chng View** hot key and select **Last Count / Pre-Package Quantities** to display the Last Count/Pre-Package Quantities view.
4. In the **Pre-Pack Qty** field, enter the package quantity assigned for the product.
5. Press **Esc** to save your changes.

Viewing Totes and Pickers

The tote identifies the physical basket or cart used to collect items from the warehouse. The picker is the person pulling product from the shelf to place in the basket.

To view a product's tote and picker:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. Display all the products in a location.
3. Use the **Chng View** hot key and select **Tote / Picker** to display the Tote/Picker view.

4. In the **Tote** field, enter the tote and picker you want to view.
5. Press **Esc** to save your changes.

Assigning or Changing Pick Statuses

The pick status identifies the pick priority for the location. For example, you may have two overflow locations for a product in your warehouse. You can assign a higher pick priority to the overflow location you want depleted first.

> **Note:** The **Pick Status** field is only accessible in RF-enabled branches.

To assign or change a product's pick status:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. Display all the products in a location.
3. Use the **Chng View** hot key and select **Last Count / Pick Status** to display the Last Count/Pick Status view.
4. In the **PickStatus** field, press **F10** and select the pick order for the location.
5. Press **Esc** to save your changes.

Changing Expiration Dates

The Expiration Date view displays the date the product in the warehouse location expires, if it is a perishable product.

If the **Use Location Expiration Dates** control maintenance record is set to **Y**, the system directs pickers to pick from locations with the earliest expiration date. For orders with quantities greater than the earliest expiration date location, the system directs the picker to start the process from the location with the earliest expiration date. Then, to pick from the location with the next earliest expiration date continuing on until the order is filled. If two locations have the same expiration date, the system directs pickers to the location with the greater quantity so that pickers only have to go to one location to pick the order.

> **Note:** We recommend cycle counting a location before updating it's product expiration dates.

To change a product's expiration date:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. Display all the products in a location.
3. Use the **Chng View** hot key and select **Last Count / Expire Date** to display the Last Count/Expire Date view.
4. In the **Last Count** field, enter the updated cycle count date.
5. In the **Expire Date** field, enter the expiration date.

6. Press **Esc** to save your changes.

Changing Received Dates

The Received Date view displays the date the product was received into inventory. When a receiver receives products into inventory, the system stores the receive date in Warehouse Location Maintenance and in Product Location Maintenance.

If the Pick By Location Based On Received Date control maintenance record is set to **Yes**, the system directs pickers to pick from locations with the oldest receive date. If two locations have the same receive date, the system directs pickers to the location with the lowest quantity to clear out locations and to avoid having several locations with small quantities.

> **Note:** We recommend cycle counting a location before updating it's product receive dates.

To change a product's received date:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. Display all the products in a location.
3. Use the **Chng View** hot key and select **Last Count / Receive Date** to display the Last Count/Receive Date view.
4. In the **Last Count** field, enter the updated cycle count date.
5. In the **Receive Dt** field, enter the date the product was received in this location.
6. Press **Esc** to save your changes.

Determining Review Location Types

Use the Review Type and Original Type view to determine the location status for a review stock item. For example, a review stock type can mean that an item is in a review status due to a pending cycle count, or that the item is in the Return Goods Queue waiting to be reviewed before being returned to your inventory or to your vendor.

If you are using RF and the RF Make Short Pick A Review Status Location control maintenance record is set to **Yes**, when a pick causes a location shortage, the system queues the location for a cycle count and changes the quantity type in the location to a Review status.

To determine a product's review location status:

1. From the **Whse Mgt > Warehouse Maintenance** menu, select **Warehouse Location Maintenance** to display the Warehouse Location Maintenance screen.
2. Display all the products in a location.

3. Use the **Chng View** hot key and select **Last Count / Review Type / Original Type** to display the following view-only fields:

Field	Description
Type	The review status type for product locations assigned the Review quantity type. **Cycle** displays if the product location is queued for a cycle count. If a type does not display in this field for Review status line items, the product in the location is in the Return Goods Queue, waiting review for return to your inventory or to the vendor.
Old	The original quantity type for this product, such as Stock or Nonstock. When you either complete the cycle count for the location or review the product and remove it from the Return Goods Queue, the location returns to this status for the product.

4. Press **Esc** to save your changes.

More Options from the Warehouse Location Maintenance Screen

The Warehouse Location Maintenance screen also offers these options.

Hot Key	Function
Fut Led	Displays the Future Ledger screen. Use this screen to view a product's future activity, such as if the product is on a sales order scheduled for shipping next week.
Hist Led	Displays the History Ledger screen. Use this screen to view up-to-the-minute product inventory data for the selected product.
Inv Inq	Displays the Inventory Inquiry screen. Use this screen to view up-to-the-minute product inventory data for the selected product.
View Tag	Displays the purchase order, sales order, or return to which the product is attached.
Serial #	Displays the Detail Product Serial Queue screen. Use this screen to view all open and available serial numbers for the product.

See Also:

Displaying Products in Warehouse Locations

Warehouse Location Maintenance Overview

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