
DSO650 Picking Plan Selection

Overview

Standard Pick Plans are the basic printing/picking runs processed on a regular basis. This option enables new standard plans to be added, as well as maintain and delete existing plans.

Explanation

The Pick Plan Module is used to plan the picking of customer orders based on various selection criteria.

Pick Plans are uniquely identified by a user defined picking plan code.

Picking criteria and parameters are defined through the plan generation option, a function enabling users to determine the inclusion or omission of titles, or a range of titles for picking release. Picking plan selection criteria is identified by user defined picking plan codes. The system does not partly release customer orders for picking, so if a title on a customer order does not satisfy the selection criteria specified, the complete order bypasses picking release. A customer order can only exist in one picking plan at a time.

In the Customer Masterfile particular customers can be identified as Export Distribution customers (that is, set up with an 'Export Distribution' carrier code, unique for their shipper). All nominated Export Distribution orders can be held until released for the pick plan that covers the weekly delivery run for Export Distribution.

Transactions are validated for the cut-off date only when a cut-off date exists. If there is no cut-off date, the validation does not apply.

Pick planning allows selection by carrier, as well as the definition of standard picking plan profiles. This enables users to set up various standard plans such as Normal, Urgent, Export, Distribution etc. Export orders can therefore be excluded from normal runs, as well as exclusively selected. There are two types of pick plans:

| Standard Plans | Actual Plans |
|---|---|
| Contain the basic selection criteria for the picking/printing runs that are run on a regular basis (e.g. Invoices, Credit Notes, and Picking Slips etc.). | Standard plans can be copied into actual plans, which are maintained if so required to suit a particular run's requirements (e.g. all orders for Target Stores to be delivered on a particular date from a specific warehouse). The pick plan code is required by the Batch Document Print program to generate the appropriate documents. |

Plan generation:

Entry requirements include the following:

- The type of document to which this pick plan is assigned. Enabling the creation of pick plans specific to the printing of advices, invoices, picking slips and so on.

- The new picking plan code.
- The plan code for the standard pick plan if basing the new plan on an existing one. In this case the new plan contains all the codes defined in the standard pick plan, which can be maintained.

Pick Plan Generation accommodate the picking merge and invoice merge as setup in control file **TMSDS/CM-OCON**.

If the order needs 'automatic' invoicing, DSE100D will pre-assign invoice number on diverted orders at the 1st pick confirmation. If 'manual' invoicing, it does not need to merge just diverted orders but merge all orders at 'A' status.

Examples

This section illustrates examples concerning:

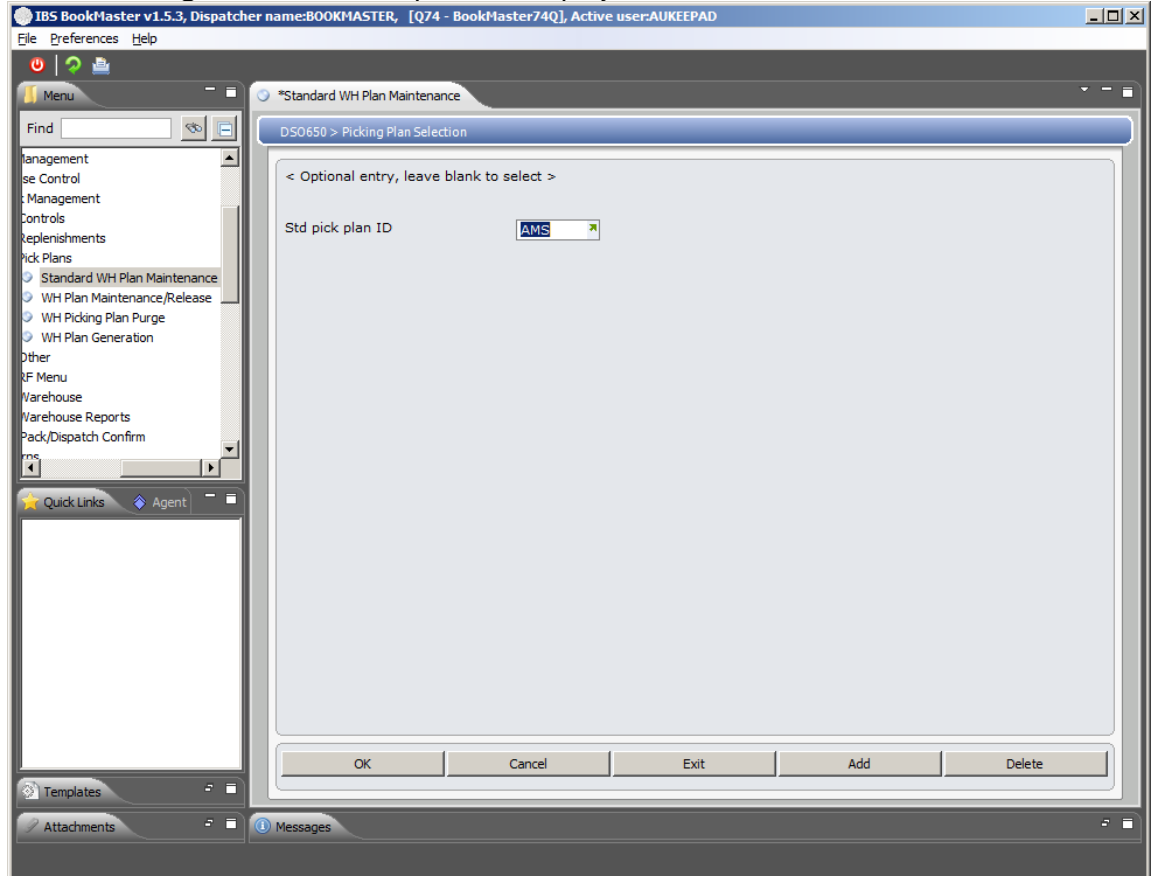
[Example 1: Add a standard picking plan](#)

Example 1: Add a standard picking plan

This example describes how to add a picking plan.

1. Select option **Standard WH Plan Maintenance** from Base Modules> Distribution> Inventory Management> Warehouse Management> Warehouse Control> Work Management> Pick Plans menu.

DSO650 Picking Plan Selection panel is displayed.



Options

| | |
|--------|-------------------------------------|
| Add | Addition of a picking plan. |
| Delete | Deletion of a selected picking plan |

Relevant Fields

| | |
|------------------|---|
| Std pick plan ID | When selecting a Pick Plan for maintenance, either one plan is selected or the field is left blank to select all current pick plans. Plan codes are specified when generating a plan. |
|------------------|---|

2. Enter std pick plan ID and click **Add**.

DSO650 Picking Plan Selection panel is displayed.

IBS BookMaster v1.5.3, Dispatcher name:BOOKMASTER, [Q74 - BookMaster74Q], Active user:AUKEPAD

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*Standard WH Plan Maintenance

DSO650 > Picking Plan Selection

Std pick plan ID TEST

1=Select All 2=Select List 3=Omit List 4=Include Range 5=Exclude Range

| Opt | Description | Value |
|--------------------------|--------------------------|-------|
| <input type="checkbox"/> | Warehouse | |
| <input type="checkbox"/> | Picking Method | |
| <input type="checkbox"/> | Document Type | |
| <input type="checkbox"/> | Document Sub Type | |
| <input type="checkbox"/> | Source of order | |
| <input type="checkbox"/> | Transaction origin | |
| <input type="checkbox"/> | Back Order Reason | |
| <input type="checkbox"/> | Type of Sale | |
| <input type="checkbox"/> | Delivery date | |
| <input type="checkbox"/> | Priority | |
| <input type="checkbox"/> | Order Value | |
| <input type="checkbox"/> | Order Weight | |
| <input type="checkbox"/> | Carrier code | |
| <input type="checkbox"/> | Warehouse order category | |

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OK Cancel Exit

Options

| | |
|---------------|---|
| Select all | No values are needed |
| Select list | Indicate specific codes to be selected in this Field |
| Omit list | Indicate specific codes to be excluded from selection |
| Include range | More than one code can be selected |
| Exclude range | More than one code can be selected |

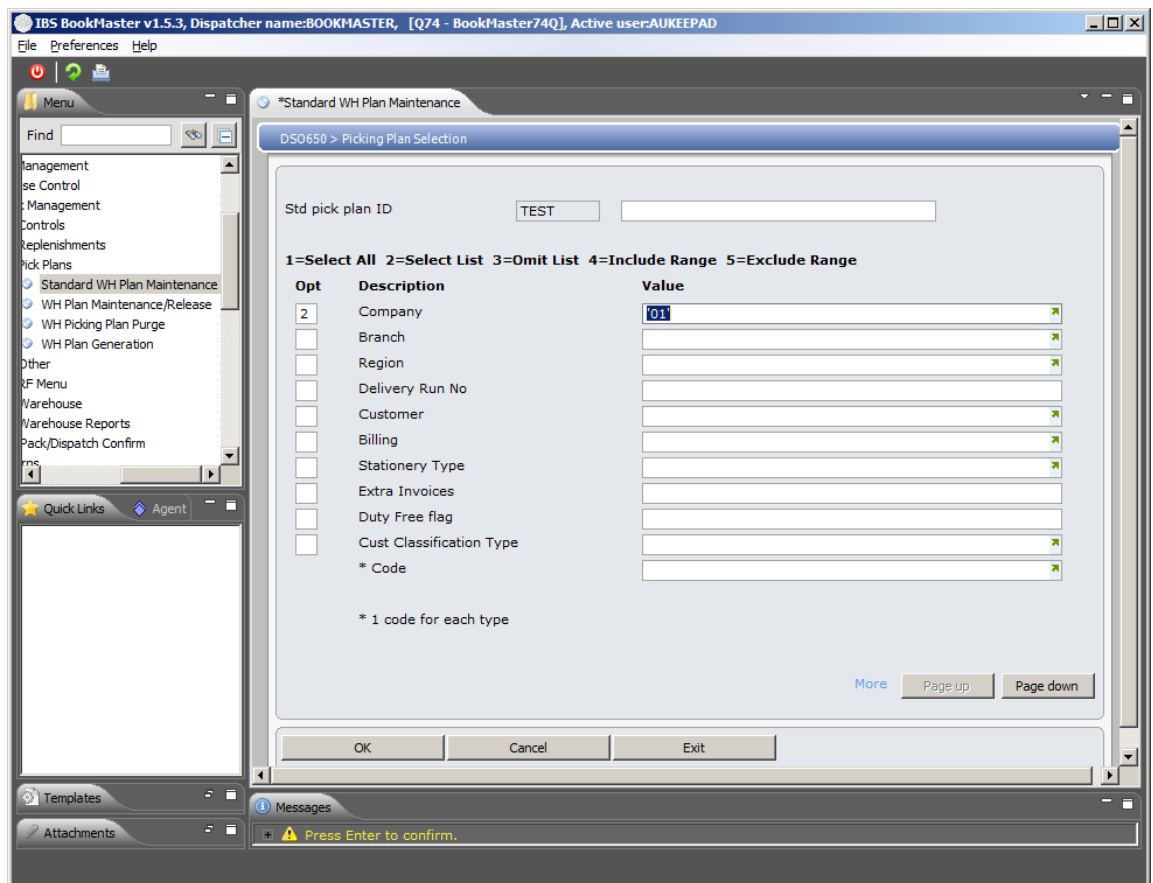
Relevant Fields

| | |
|----------------|---|
| Warehouse | The Warehouse code is made up of warehouse location and branch code. The default is set up in TMSWH/WH-DFT and can be changed if required. |
| Picking Method | This is the type of document on which the goods are moving through the Warehouse. This field is hard coded to default to 'P', |

| | |
|--------------------------|--|
| | but can be changed. |
| Document type | A Transaction Document type can be included in the definition. |
| Document sub type | Document sub-types can be included in the definition. |
| Source of order | A Source of Transaction can be included in the definition. |
| Transaction origin | A Transaction origin can be included in the definition. |
| Back order reason | This is the Stock status code that can be included in this definition. |
| Type of sale | A Type of sale can be included in the definition. |
| Delivery date | A Delivery date can be included in the definition. |
| Priority | A Priority code which ranges from 1 to 9 can be included in the definition. |
| Order value | <p>An Order Value can be included in this definition. Separate values by spaces.</p> <p>For example opt 4=Range 100.00 999.99</p> |
| Order weight | <p>This field contains the Order Weights that can be included in a definition. Separate values by spaces.</p> <p>For example opt 4=Range 0 5.0</p> |
| Carrier code | Carrier Codes can be included in the definition. |
| Warehouse order category | <p>In Batch Document Print this is one of the Optional Override fields enabling the user to select an Order Picking Category. These categories are also used when defining Standard Pick Plans.</p> <p>For Example: URG=Urgent orders.</p> |

3. Page down.

DSO650 Picking Plan Selection panel is displayed.



Relevant Fields

Company

Company codes can be included in the definition. This uses the transaction company rather than customer company

Branch

Customer branch codes can be included in this definition.

Region

A Region Description can be included in the definition.

Delivery Run No

A Delivery Run number can be included in the definition.

Customer

A Region Description that can be included in the definition.

For example: '100800' = David Jones

Billing

When creating a Standard Plan and in Plan Generation, Billing Accounts can be selected.

Stationery Type

A Stationery Type can be included in this definition.

Extra Invoices

The number of extra invoices required can be included in the definition.

Duty Free flag

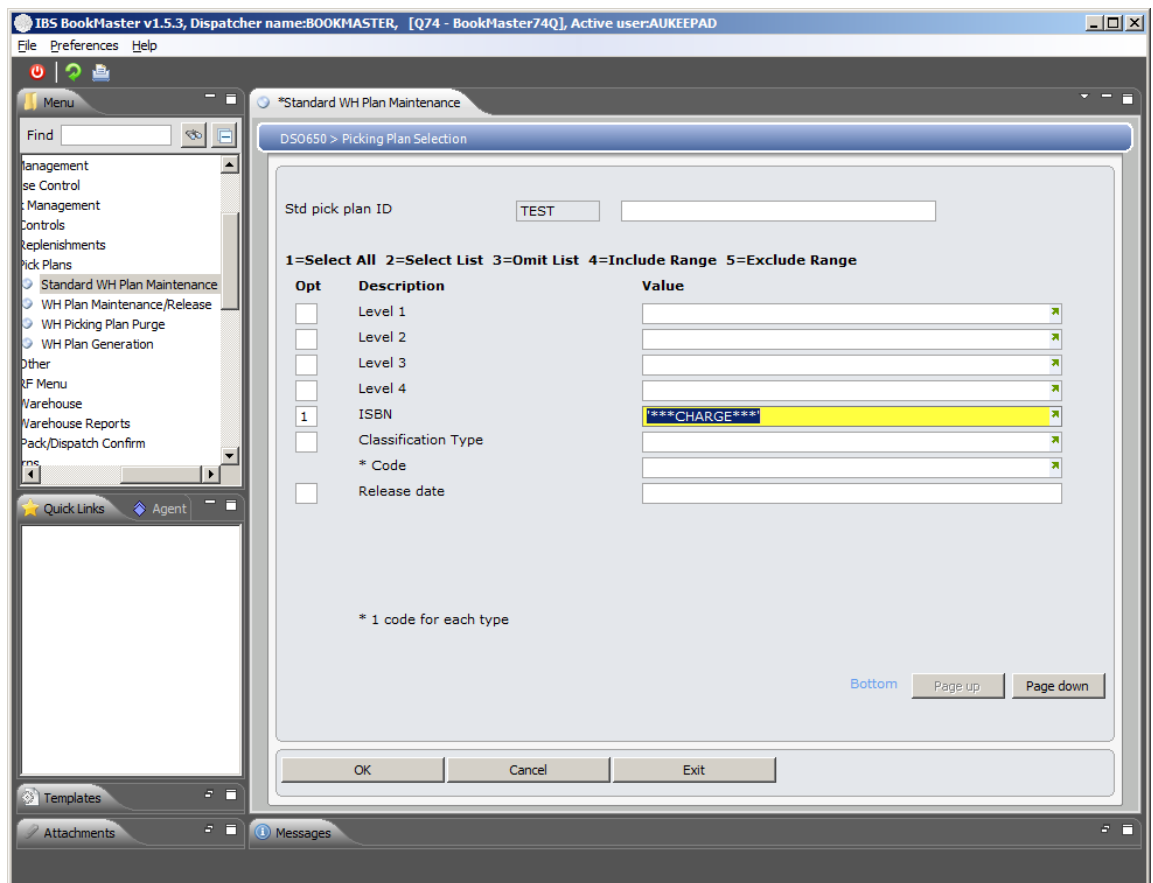
A Y/N Duty Free flag can be included in this definition.

Cust Classification type

Customer Classification type can be included in the definition. If a Type is selected the applicable codes are then entered.

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DSO650 Picking Plan Selection panel is displayed.



Relevant Fields

Level 1-4

Level codes can be included in the definition.

ISBN

Select the titles to be included in the definition.

Classification type

Classification types can be included in this Title File definition. If a type is selected the applicable codes are entered.

Publication date

Select the Publication dates to be included in this definition.

5. Key in required fields and click **OK**.

On entry of the selection criteria the picking selection routine is automatically generated. Selected customer orders can then be viewed by requesting picking reports, and maintained and/or released via the Plan Maintenance/release option.

Note To maintain/ delete, select the title and click on the corresponding option.

Cross Reference

- DSR100B – OPB - Batch document print