



Infor LN Warehousing User Guide for Inventory Blocking

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About this Guide

Objectives

The objectives of this book are to describe the purpose and the use of inventory blocking.

References

Use this guide as the primary reference for inventory blocking. Use the current editions of these documents for information that is not covered in this guide:

- *User Guide for Warehouses*
- *User Guide for the Inbound Goods Flow (U9788 US)*
- *User Guide for the Outbound and Shipments Goods Flows (U9794 US)*
- *User Guide for Warehousing Inspections (U9875 US)*
- *User Guide for Handling Units (U8938 US)*
- *User Guide for Project Pegging (U9777 US)*
- *User Guide for Cycle Counting and Adjustment Orders (U9789 US)*

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Chapter 1: Introduction

To block and unblock

You can block the inbound movement, outbound movement, transfer (receipt, issue), or assembly of items in these ways:

- By blocking *stock points*
- By blocking inbound and outbound types of transaction.

Blocking stock points

A stock point block blocks these types of transaction for the affected stock points:

- Inbound movement
- Outbound movement
- Transfer (receipt, issue)
- Assembly

Also, a stock point block increases the quantity of the *inventory on hold* and decreases the quantity of the inventory available.

When you impose a stock point block, you must specify a reason code of either of these types:

- **Inventory Blocking excluding EP**
Enterprise Planning can ignore the block and regard the blocked stock points as available inventory.
- **Inventory Blocking including EP**
The blocked stock points are unavailable for planning.

To impose stock point blockings, you can block any of these objects:

- *Zone*
The stock points stored in the locations of the zone are blocked.
- *Location*
The stock points of the location are blocked.
- *Lot*
The stock points of the lot are blocked.
- *Stock point*
The stock point and, if present, the serial numbers of the stock point are blocked.
- *Serialized item*
Specific serial numbers of partially blocked stock points are blocked.

- *Handling unit*

The stock points contained in the handling unit are blocked. If the handling unit has child handling units, LN blocks the child handling units and the stock points contained in the child handling units.

After blocking a zone, location, lot, handling unit, or stock point, the resulting blocked stock points are displayed in the **Blocked Stock Points (whwmd6550m000)** session.

Partial stock point blockings

You can impose partial blockings on a stock point. For example, a stock point has a total on hand quantity of 20. A user imposes a manual blocking for 10 items for reason A on this stock point.

Multiple blockings for the same stock points

Various blockings can affect the same stock point. For example, a stock point contains 20 items and you impose a partial blocking of 5 items, a partial blocking of 3 items, and another partial blocking of 7 items. Or a user imposes a partial blocking on a stock point, and, later on, another user blocks the location in which the stock point is stored.

Updating the stock-point blocked inventory

A stock point block increases the quantity of the inventory on hold and decreases the quantity of the inventory available.

After blocking a stock point, the entire inventory of the stock point is blocked. If a partial blocking is imposed on a stock point, the blocked inventory of the stock point is increased by the quantity of the partial blocking.

If multiple partial blockings are imposed on a stock point, the blocked inventory of the stock point can be updated in these ways:

- Increase the blocked inventory with the aggregated quantities of the partial blockings.
- Increase the blocked inventory by the quantity of the largest partial blocking. For example, a stock point contains 20 items and you impose a partial blocking of 5 items and a partial blocking of 3 items. The blocked inventory is increased by 5.

The settings of these check boxes are used to control the way the blocked inventory is updated:

- **Allow Overlapping Stock Point Blocking** parameter in the **Warehouse Master Data Parameters (whwmd0100s000)** session and the **Warehousing Settings by Site (whwmd2101m000)** session.
- **Overlapping** in the **Stock Point Blocking (whwmd6130m000)** session.

Blocking project pegged inventory

If you block a zone, location, lot, handling unit, or stock point, the *project pegged* inventory contained in these objects is also blocked.

Blocking transactions

A transaction block is a block imposed on transactions of these types:

- Inbound movement

- Outbound movement
- Transfer (receipt, issue)
- Assembly

If you block specific types of transactions, the *inventory on hold* of the affected items is not increased. The inventory is just blocked for inbound, outbound, assembly, or transshipment.

With transaction blocks, no individual stock points are blocked, and there is no impact on the inventory levels or on Enterprise Planning.

You can impose transaction blocks on these objects:

- *Warehouse*
- *Zone*
- *Location*
- *Lot*
- *Stock point*

Blocking warehouses for inbound and outbound transactions

You can block a warehouse for all inbound transactions, all outbound transactions, or both. A block on a warehouse is either full or interactive. Full block means that no transactions are allowed. Interactive means that the user can manually override some of the blocks on inbound or outbound transactions.

Blocking transactions for zones, locations, lots, and stock points

For zones, location, lots, and stock points, you can impose a transaction block for each type of transaction. For these objects, interactive blocks are unavailable.

A full or an interactive block imposed on a warehouse also applies to any zones or locations of the warehouse. If the warehouse is blocked for inbound transactions, the zones and locations of the warehouse that accommodate receipts are also blocked. Similarly, a warehouse blocking on outbound transactions blocks the zones or locations for outbound transactions.

If a warehouse is not blocked for inbound transactions, you can impose inbound blocks on the zones and locations of the warehouse, and if a warehouse is not blocked for outbound transactions, you can impose outbound blocks on the zones and locations.

Similarly, blockings set for zones override those set for locations. If a zone is blocked for a type of transaction, the locations of the zone are also blocked for this type of transaction.

Chapter 2: Blocking Zones and Locations

To block or unblock zones and locations

You can impose stock point blocks on *zones* and *locations* using the Zone/Location Blocking (whwmd6110m000) session. In this session, you can partially block, block, or unblock the warehouse inventory.

Use the Location Blocking by Transaction (whwmd6111m000) session to block or unblock specific transactions in an entire location or a part of a location. Use the Zone Blocking by Transaction (whwmd6112m000) session to block or unblock types of transaction at zone level.

You can also use the Warehouse - Storage Zones (whwmd3110s000) and Warehouse - Location (whwmd3100s000) sessions to block or unblock specific types of transaction for zones and locations.

Use the Global Zone/Location Blocking (whwmd6210m000) session to block or unblock a range of zones or locations at once for one or more types of transaction or all types of transaction.

If a zone is blocked for a type of transaction, the locations of the zone are also blocked for that type of transaction. The corresponding location fields are updated. For example, if a zone is blocked for inbound transactions, the **Blocked** check box in the **Warehouse - Location (whwmd3100s000)** session and the **Inbound Blocked** check box in the **Location Blocking by Transaction (whwmd6111m000)** session are selected.

Note: If a warehouse is blocked for inbound or outbound transactions, the corresponding fields for the zones and locations are not updated.

Chapter 3: Blocking Lots

To block or unblock lots

Use the **Lot Blocking (whwmd6120m000)** session to block or unblock lots for all types of transactions.

You must use the **Lot Blocking by Transaction (whwmd6121m000)** session to block or unblock transaction types for lots.

You can block or unblock a range of lots by transaction type using the **Global Lot Blocking (whwmd6220m000)** session.

Chapter 4: Blocking Stock Points

To block or unblock stock points and serialized items

Use the Stock Point Blocking (whwmd6130m000) session to (partially) block or unblock *stock points* for all types of transactions.

You can use the Stock Point Blocking by Transaction (whwmd6131m000) session to block or unblock transaction types for stock points.

You can block or unblock a range of stock points by type of transaction by using the Global Stock Point Blocking (whwmd6230m000) session.

To block or unblock specific serialized items in case of a partially blocked stock point, use the Serial Blocking (whwmd6135m000) session.

Use the Serial Blocking by Transaction (whwmd6136m000) session to block or unblock transaction types for serialized items.

Tip: To block goods that are at a *receiving location* or *quarantine location*, neither of which supports stock points, in the Warehouse - Location (whwmd3100s000) session, on the **Transactions** tab, select the **Blocked** check box next to the appropriate transaction type.

Updating the stock-point blocked inventory

When a zone, location, lot, or handling unit is blocked, the inventory of all underlying stock points is blocked.

An individual stock point can be fully blocked or partially blocked. A full block is imposed by selecting the **Fully Blocked** check box in the **Stock Point Blocking (whwmd6130m000)** session. To impose one or more partial blockings, clear this check box and specify the quantity to be blocked.

If multiple partial blockings are imposed on a stock point, the settings of these fields determine how the blocked inventory is updated:

- **Allow Overlapping Stock Point Blocking** in the **Warehouse Master Data Parameters (whwmd0100s000)** session and the **Warehousing Settings by Site (whwmd2101m000)** session.
- **Default Blocking Behavior** in the **Warehouse Master Data Parameters (whwmd0100s000)** session and the **Warehousing Settings by Site (whwmd2101m000)** session.
- **Overlapping** in the **Stock Point Blocking (whwmd6130m000)** session for individual stock point blockings.

Overlapping stock point blocking not allowed

If the **Allow Overlapping Stock Point Blocking** check box is cleared, the blocked inventory of a stock point is increased by the added quantities of the partial blockings imposed on the stock point. For example, a stock point contains 20 items and you impose a partial blocking of 5 items, a partial blocking of 3 items, and another partial blocking of 7 items. The blocked inventory is increased by 15 items.

The total quantity of the partial blockings imposed on the stock point cannot exceed the total quantity of the stock point. If you try to add a partial blocking that would result in a blocked quantity higher than the total quantity of the stock point, an error message is displayed.

Overlapping stock point blocking allowed

If the **Allow Overlapping Stock Point Blocking** check box is selected, the **Overlapping** check box in the **Stock Point Blocking (whwmd6130m000)** session becomes available for individual stock point blockings.

For individual partial stock point blockings, the setting of the **Default Blocking Behavior** field determines whether the **Overlapping** check box is cleared or selected by default.

Note: The total quantity of the partial blockings for which the **Allow Overlapping Stock Point Blocking** check box is selected is allowed to exceed the total on-hand quantity of the stock point, but the quantity of an individual blocking for which the **Allow Overlapping Stock Point Blocking** check box is selected is not to allowed to exceed the total quantity of the stock point.

When a manual partial blocking is imposed on a stock point, the blocked inventory is increased by the quantity of the partial blocking.

If multiple partial blockings are imposed on a stock point, the blocked stock point inventory is updated with the highest outcome of these calculations:

- The sum of the partial blockings for which the **Overlapping** check box is cleared.
- The highest quantity of the partial blockings for which the **Overlapping** check box is selected.

Example 1

A stock point contains 20 items and you impose a partial blocking of 5 items, a partial blocking of 3 items, and another partial blocking of 7 items. For these blockings, the **Overlapping** check box is selected. Since the highest quantity of the partial blockings is 7, this quantity overlaps the quantity of the other blockings and thus the blocked inventory is increased by 7.

Blocking sequence	Reason	Overlapping	Blocked quantity	Stock point inventory blocked	Description
1	R1 Wrong color	Selected	5	5	
2	R2 Wrong shape	Selected	3	5	Three of the items with the wrong color have the wrong shape.

Blocking sequence	Reason	Overlapping	Blocked quantity	Stock point inventory blocked	Description
3	R3 Damaged	Selected	7	7	Seven items are damaged, including the ones with the wrong color and the wrong shape

Example 2

A stock point contains 20 items and you impose a partial blocking of 5 items, a partial blocking of 3 items, and another partial blocking of 7 items. The quantities of blockings 1 and 2 are added because they are not overlapping. The resulting quantity of 8 is compared with blocking 3, which is overlapping. The blocked inventory is increased by 8, because the aggregated quantities of blockings 1 and 2 is higher than blocking 3's quantity of 7.

Blocking sequence	Reason	Overlapping	Blocked quantity	Stock point inventory blocked	Description
1	R1 Wrong color	Cleared	5	5	
2	R2 Wrong shape	Cleared	3	8	In addition to the items with the wrong color, three items have the wrong shape.
3	R3 Damaged	Selected	7	8	Seven of the items with the wrong color or the wrong shape are damaged.

Generate NCMR for blocked stock points

LN allows you to generate a *non-conformance material report (NCMR)* report for blocked *stock points* in the **Stock Point Blocking (whwmd6130m000)** session.

The **Report** option in this session is enabled only if the **Non-Conformance Implemented** check box is selected in the **Quality Management Parameters (qmptc0100m000)** session. This option starts the **Non-Conformance Reports (qmncm1100m000)** session that:

- Allows you to create a new NCMR report for a stock point.
- Displays the existing NCMR report for a stock point.

If a *non-conformance material report (NCMR)* exists for a stock point, the **Non-Conforming Material Report** field is checked by LN.

You can modify the quantity or the unit in the **Non-Conformance Reports (qmncm1100m000)** session if the NCMR **NCR Status** is **open**. This also applies to the blocking data associated with the NCMR. When the NCMR **NCR Status** is **open**, and the serials are added or removed in the **Serial Blocking (whwmd6135m000)** session, LN modifies the corresponding NCMR report.

LN allows the user to generate a NCMR report blocked by other users. You can also block stock points by specific business partner.

When a stock point is blocked and the item is serialized in inventory, and not all the serials can be blocked, then the stock point can only be blocked partially for the quantity that allows you to block.

When multiple stock points are blocked for the same warehouse, location and the item, but for different lots, LN groups the stock points or lots into a single NCMR report.

Chapter 5: Blocking Handling Units

Blocking or unblocking handling units

Use the **Handling Unit Blocking (whwmd6140m000)** session to partially block, block, or unblock *handling units* for all types of transactions.

To view the blocked stock points of a parent handling unit, in the **Handling Unit Blocking (whwmd6140m000)** session, select the line containing the blocked parent handling unit and from the *appropriate menu*, select **Blocked Stock Points** to start the Blocked Stock Points (whwmd6550m000) session.

The **Blocked Stock Points (whwmd6550m000)** session displays the stock points contained in the blocked handling unit. If the blocked handling unit is linked to child handling units, the child handling units are displayed together with the blocked stock points contained in them.

If project peg or ownership details exist for the blocked inventory contained in the handling units, you can view and maintain the project peg or ownership details in the Blocked Stock Point Details (whwmd6152m000) session. You can start this session from the **Blocked Stock Points (whwmd6550m000)** session.

Chapter 6: Blocking Project Pegs

Manual blocking and project pegged inventory

You can manually block a:

- *Zone*
- *Location*
- *Lot*
- *Stock point*
- *Serialized item*
- *Handling unit*

If the inventory contained in these elements includes project pegged inventory, LN uses this sequence to determine the pegs that must be blocked:

- 1 Block unpegged inventory.
- 2 Block pegged inventory with excess and partly or entirely block the excess quantity alphabetically.
- 3 Block pegged inventory with available-to-transfer and partly or entirely block the available-to-transfer quantity alphabetically.
- 4 Block the pegged inventory without excess and without available to transfer by the latest next requirement date.

The blocked project peg and ownership information is displayed in the Blocked Stock Point Details (whwmd6152m000) session. This session allows you to manually adjust the project peg blockings generated by LN.

When you close the **Blocked Stock Point Details (whwmd6152m000)** session after adjusting the blocked project peg details, LN checks if the total blocked quantity of the pegs is equal to the blocked quantity of the previously imposed manual peg of type zone/location, lot, handling unit or stock point.

For example, if you specify a manual block of type lot in the **Lot Blocking (whwmd6120m000)** session and adjust the project pegged quantities in the **Blocked Stock Point Details (whwmd6152m000)** session, the blocked quantities in the **Blocked Stock Point Details (whwmd6152m000)** session are not allowed to exceed the blocked quantities resulting from the blocked lot in the **Lot Blocking (whwmd6120m000)** session.

LN also allows you to block the project inventory that is located in a *project warehouse*. You must manually assign the blocked stock to pegs. Consequently, you can enter blocked quantities only from the peg distribution. The blocked quantity cannot be specified at the header level. Based on the reason type, the blocked quantity is also adjusted in the **Project Pegged Inventory (whwmd2560m000)** session.

LN allows you to block quantities for multiple reasons and by multiple users. The maximum number of the manually blocked and process blocked quantities is displayed in the session. For example, a user blocks a

peg for quantity 3 and another user blocks the same peg for quantity 4. The quantity 4 is displayed as the quantity blocked for the peg.

Chapter 7: Including or Excluding Enterprise Planning

Inventory blocking including or excluding Enterprise Planning

Enterprise Planning may require information of blocked inventory.

For example, if a lot is blocked for a quick inspection on the packing materials and you expect to lift the blocking shortly, Enterprise Planning does not require this information. On the other hand, if you expect the lot to be withdrawn from inventory, Enterprise Planning must be informed that this lot is no longer part of the available inventory.

In the first case, you must select a reason code of reason type **Inventory Blocking excluding EP**. Consequently, Enterprise Planning ignores this type of blocking and regards the blocked inventory as available inventory. In the latter case, you must select a reason code of reason type **Inventory Blocking including EP**.

Note:

You can use reason codes of either reason type for items:

- Without **Order System Planned**
- Used as supplying items or *bill of material (BOM)* parts for items planned by Enterprise Planning.

Chapter 8: Blocking for Storage Inspection and Cycle Counting

Blocking for storage inspection and cycle counting

You can block inventory that result from:

- Storage inspection orders
You can block inventory if the items are yet to pass inspection.
- Cycle-count orders
You can block inventory if the items are included in a cycle count order. When you process a counting list, the inventory blocked for cycle counting is unblocked by LN.

Note: When LN prints cycle-counting lists, the inventory lines printed on the counting list are automatically blocked, to prevent changes to quantities during cycle counting. When counting lists are processed, the inventory lines are unblocked by LN.

Chapter 9: Transaction Blockings for Warehouses

Blocking or unblocking warehouses

You can block a warehouse for inbound procedures, outbound procedures, or both.

For example, you can block inbound and outbound procedures for a warehouse if the warehouse must be closed temporarily for inspection.

You can impose these types of blockings:

- **Full block**
Full block on warehousing procedures.
- **Interactive block**
Override blocking allowed except blocks on confirm shipment or confirm receipt.

If you impose a full block on inbound procedures, the receipt and inbound inspection procedures are not allowed for the warehouse.

If you impose a full block on outbound procedures, the outbound, outbound inspection, and shipment procedures are not allowed for the warehouse.

An interactive block on inbound procedures blocks the confirm receipt step. For the other inbound steps (for goods already received), a warning is displayed and you are prompted to cancel the procedure or to continue.

These are the other inbound steps:

- Generate and release inbound advice
- Print and confirm storage lists
- Put away stock

If you perform the outbound steps of a warehouse transfer and an interactive inbound block is imposed on the receiving warehouse, you are warned that the receiving warehouse is blocked.

An interactive block on outbound procedures blocks the confirm shipment step. For the remaining outbound and shipment steps, a warning is displayed and the user is prompted to cancel the procedure or to continue. Assembly, internal inventory movements and inventory adjustments are also allowed.

Setup

Warehouse blockings are specified in the **Warehouses (whwmd2500m000)** session.

To impose an inbound block, select one of these values for the Blocked for Inbound field:

- **Yes** = full block.
- **Interactive** = interactive block.

To impose an outbound block, select one of these values for the Blocked for Outbound field:

- **Yes** = full block.
- **Interactive** = interactive block.

If you specify a full or interactive inbound or outbound block, a warning is displayed if there are uncompleted procedures for the warehouse. You are prompted to specify or cancel the block. For example, if you impose an interactive inbound block and there are unconfirmed receipts for the warehouse, a warning is displayed.

Warehouse block affects zones and locations

An inbound or outbound block that is specified for a warehouse affects the zones and locations of the warehouse. An inbound warehouse block also blocks the zones and locations of the warehouse that accommodate inbound movement, even if no transaction blockings are specified for the zones or locations. Similarly, an outbound block also blocks the zones and locations of the warehouse that accommodate outbound movement.

Note:

If an inbound or outbound block is specified for a warehouse, the transaction blocking check boxes for the zones and locations of the warehouse are not updated in these sessions:

- Warehouse - Location (whwmd3100s000)
- Warehouse - Storage Zones (whwmd3110s000)
- Location Blocking by Transaction (whwmd6111m000)
- Zone Blocking by Transaction (whwmd6112m000)

Creating warehousing orders

If a warehouse is fully blocked for receipt and inbound inspection procedures, you cannot create manual inbound warehousing orders for the warehouse. If a full block is imposed on outbound and shipment procedures, you cannot create manual outbound warehousing orders.

You can create manual warehousing orders for warehouses that have an interactive block, but confirming receipts for inbound orders or confirming shipments for outbound orders is not allowed.

Warehousing orders for blocked warehouses can be generated from, for example, purchase or sales orders.

If the warehouse is fully blocked, the process stops after the initial step of the warehousing procedure.

If the block is interactive and the warehousing procedure is automatic, a message saying that a block is imposed is displayed, but the warehousing procedure is carried out and stops at the confirm receipt (inbound) or confirm shipment (outbound) step.

In either case, to process the orders you can wait until the block is lifted or cancel the warehousing orders and create new warehousing orders using unblocked warehouses.

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