



Infor LN Warehousing User Guide for Warehousing Procedures

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About this Guide

Objectives

The objectives of this book are to describe the purpose and the use of warehousing procedures.

References

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

- *User Guide for Warehouses*
- *User Guide for Warehousing Orders*
- *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 Warehousing Quarantine Handling (U9876 US)*
- *Infor LN Warehousing - User Guide for Multisite*

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Chapter 1: Introduction

Inbound and outbound procedures

In LN, user-definable warehousing procedures control the inbound, storage, and outbound goods flows in your warehouse.

A warehousing procedure includes various *activities* that determine the way goods are processed in the warehouse.

The warehousing inbound flow comprises the following default procedures:

- The **Receipt Procedure**
- The **Inspection Procedure**

The warehousing outbound flow comprises the following default procedures:

- The **Outbound Procedure**
- The **Shipment Procedure**

The outbound procedure can include outbound inspections, if required.

Inbound and outbound processing of goods

To process the goods in LN, you can take either of the following steps:

- Process the warehousing order lines that list the goods
If you process the warehousing order lines, by default, LN processes the goods according to the warehousing procedure that is linked to the warehouse order type of the warehousing order to which the order lines belong. For individual warehousing orders or order lines, you can modify the default warehousing procedure. For further information on defining and modifying warehousing procedures, see [To define warehousing procedures](#) and [How to modify warehousing procedures](#).
- Process the handling units that contain the goods
To process a *handling unit*, the handling unit must be linked to a warehousing order line. If you process a handling unit, the handling unit is processed according to the warehousing procedure of the warehousing order line. For each procedure step that a handling unit takes, the order lines are updated in the background.

Inbound goods are listed on inbound order lines, and outbound goods are listed on outbound order lines. Inbound and outbound order lines are generated from orders originating from other LN packages or are manually created in Warehousing. For more information, refer to [Warehousing orders](#).

Depending on your data setup, handling units can be generated automatically for inbound or outbound goods, or you can generate or manually create handling units during any of the stages of the inbound and outbound goods flow.

You can view the progress of order lines or handling units during warehouse processing in the following sessions:

- **Inbound Line Status Overview (whinh2119m000)**
- **Outbound Line Status Overview (whinh2129m000)**
- **Handling Unit Process Inbound (whinh2113m000)**
- **Handling Unit Process Outbound (whinh2123m000)**

These sessions show the activities that have been performed for the order lines or the handling units, and show the next activity that you must perform. In addition, in these sessions you can perform activities that must be performed manually.

Tax and Registration Data is not complete

The message “Tax and Registration Data is not complete for < ID of originating order >” means that required tax and registration data is not present for the warehousing order, receipt, or shipment that you are currently processing. You cannot continue processing until the missing data has been specified on the originating order.

This message can be displayed if the **Extended Registration Management** field is set to **Active** in the **Global Registration Parameters (tctax2100m000)**.

Tax and registration data are maintained in the **Tax and Registration Data (tctax2150m000)** session.

Chapter 2: Defining Warehousing Procedures

Warehousing procedures

To model the inbound, storage, and outbound goods flows in your warehouse, you can define warehousing procedures in LN.

These warehousing procedure types are available:

- **Receipt Procedure**
This procedure controls the receipts of goods
- **Inspection Procedure**
The inspection procedure controls the inspection of goods received at the warehouse.
- **Outbound Procedure**
The outbound procedure controls the issue of goods. This procedure can include outbound inspections.
- **Shipment Procedure**
The shipment procedure controls staging and shipping of goods.

A *warehousing procedure* includes various steps called *activities* that control the way warehousing orders and/or handling units are processed. An activity is performed using a particular LN session.

Link warehousing procedures to inbound and outbound goods

Initially, you define a warehousing procedure and link this procedure to a particular *warehousing order type*. As a result, the warehousing procedure is the default procedure for the warehousing orders to which the order type is allocated, and the goods are processed according to the procedure of the order on which the goods are listed.

If you use handling units to process goods into and/or out of the warehouse, the goods are processed according to the warehousing procedure of the warehousing orders that list the goods contained in the handling units.

You can adjust the default procedure for individual warehousing orders and warehousing order lines of this warehousing order type. If you adjust the default procedure for an individual warehousing order of this order type, the adjusted procedure applies to the inbound and/or outbound order lines of the warehousing order. You can also adjust the warehousing procedure for an individual inbound or outbound order line.

Automatic or manual execution of activities

You can specify whether an *activity* of a warehousing procedure must be carried out manually or automatically. Manually means that the user must perform the activity using the session related to the activity. Automatic means that the activity is carried out automatically after the preceding activity is finished. If the first activity

is automatic for warehousing orders generated from orders originating from other packages, this activity is carried out the moment the warehousing order is generated.

However, to trigger warehouse processing for warehousing orders whose first activity is set to automatic processing and that are manually created or generated from Project, you must click Process.

The Process command is available in the following sessions:

- **Warehousing Orders (whinh2100m000)**
- **Warehousing Order (whinh2100m100)**
- **Warehouse Manager Dashboard (whinh2300m000)**
- **Warehousing Assembly Orders (whinh2101m000)**
- **Inbound Order Lines (whinh2110m000)**
- **Outbound Order Lines (whinh2120m000)**

How to define a warehousing procedure

1 Define procedure

In the **Warehousing Procedures (whinh0105m000)** session, define the identification code, the description and the procedure type of the warehousing procedure.

2 Add activities to procedure

After you create a warehousing procedure, you must add *activities* to the procedure. To add activities, proceed as follows:

- a** In the **Activities by Procedure (whinh0106m000)** session, in the **Warehousing Procedure** field, select the procedure to which you want to add activities. As a result, LN displays the available activities related to the procedure type of the warehousing procedure you just selected. For example, if you defined a receipt procedure in the **Warehousing Procedures (whinh0105m000)** session and select this receipt procedure in the **Activities by Procedure (whinh0106m000)** session, LN displays the available receipt activities.
- b** To add an activity to the procedure, select the **Applicable** check box next to the activity. Note that most procedures have a few mandatory activities, such as **Warehouse Receipt (whinh3512m000)** in the **Receipt Procedure**, or **Generate Outbound Advice (whinh4201m000)** session in the **Outbound Procedure**. Mandatory activities are pre-selected by LN and read-only. For further information, see Applicable.
- c** To specify that the added activity must be carried out automatically, select the Automatic check box. If you do not select this check box, the user must manually trigger the activity.
- d** For activities that involve printing documents, such as storage lists or shipping documents, in the Output Device field, select one of the output devices available in your organization.

3 Link procedure to **Warehousing Order Type**

To link the procedure to warehousing orders, in the **Warehousing Order Types (whinh0110m000)** session, link the warehousing procedure to a *warehousing-order type*. As a result, the warehousing procedure is the default procedure for the warehousing orders to which the order type is allocated.

4 Link **Warehousing Order Type** to **Order Origin**

To link the warehousing order type to order origins, in the **Default Order Types by Origin (whinh0120m000)** session, link the warehousing order type to an order origin. As a result, the warehousing order type (with the warehousing procedure previously allocated) is the default warehousing order type for warehousing orders generated from orders of the order origin to which the warehousing order type is linked.

How to modify warehousing procedures

By default, to process the order lines of warehousing orders of a particular warehousing order type, LN uses the warehousing procedure linked to the warehousing order type. For individual warehousing orders of this order type, you can adjust this default warehousing procedure. As a result, the adjusted procedure applies to the inbound and/or outbound order lines of the warehousing order. You can also adjust the warehousing procedure for an individual inbound or outbound order line.

Therefore, you can modify warehousing procedures on the following levels:

- Procedure level
- Warehousing order level
- Inbound and outbound order line level

Procedure level

On procedure level, you can change the default warehousing procedure for warehousing orders of a particular warehousing order type.

In the **Activities by Procedure (whinh0106m000)** session, you can perform the following changes for a default warehousing procedure:

- Delete the procedure, provided that the procedure is not linked to a warehousing order type.
- Modify the activities of the procedure.

The changes to the activities become effective for the order lines of warehousing orders that have the same order type as the order type to which the procedure is linked and that are created after the changes of the procedure are saved. These orders are either manually created or generated from orders originating from other packages. Warehousing orders currently processed by means of the procedure are not affected by the changes.

To change the activities of a procedure on procedure level, proceed as follows:

- 1 In the **Warehousing Procedure** field of the **Activities by Procedure (whinh0106m000)** session, select the procedure whose activities you want to change.
- 2 Select or clear the Applicable check box and/or the Automatic check box. Note that you cannot clear the **Applicable** check box for mandatory activities.

Warehousing order level

On warehousing order level, you can change the default warehousing procedure for an individual warehousing order.

If a new warehousing order is manually created or automatically generated from an order of another package, the default warehousing procedure linked to the warehousing order type of the new warehousing order is copied to the Activities by Warehousing Order (whinh2104m000) session.

In the **Activities by Warehousing Order (whinh2104m000)** session, you can adjust the activities for the selected order.

To adjust the default warehousing procedure for an individual warehousing order, proceed as follows:

- 1** In the **Warehousing Orders (whinh2100m000)** session, select the relevant warehousing order.
- 2** Start the **Activities by Warehousing Order (whinh2104m000)** session from the *appropriate* menu. This session lists the activities of the default warehousing procedure for the selected warehousing order.
- 3** In the **Activities by Warehousing Order (whinh2104m000)** session, change the values of the following fields to adjust the activities for the selected order:
 - Automatic
 - Applicable
 - Output Device

As a result, the adjusted warehousing procedure applies to the inbound and/or outbound order lines of the selected warehousing order (transfer orders include both inbound and outbound order lines), except for order lines that:

- Are being processed.
- Have order line activities created by the user.

See the next section on how to create and adjust activities for inbound or outbound order lines.

Note: If you change an originating order of a warehousing order, LN deletes the warehousing order or order line and replaces the order or order line with a new order or order line that includes the changes made for the originating order. Consequently, the activities for the deleted warehousing order are deleted as well and replaced with the default procedure, thus erasing any changes made to the activities.

Inbound and outbound order line level

On order line level, you can adjust or delete the activities of the warehousing procedure of the order header.

Adjust the activities of the warehousing procedure for individual order lines

For an individual inbound or outbound order line, you can adjust the warehousing procedure of the order header to which the order line belongs. If you adjust the procedure for an order line, the warehousing procedure of the order header is copied from the **Activities by Warehousing Order (whinh2104m000)** session to the **Activities by Inbound Order Line (whinh2114m000)** session for inbound order lines and the **Activities by Outbound Order Line (whinh2124m000)** session for outbound order lines. In these sessions, you can adjust the activities to meet the order processing requirements for the selected order line.

In the **Activities by Inbound Order Line (whinh2114m000)** session, you can adjust the activities for individual inbound order lines. In the **Activities by Outbound Order Line (whinh2124m000)** session, you can adjust the activities for outbound order lines.

Inbound order linesTo adjust the warehousing procedure for an individual inbound order line, proceed as follows:

- 1 In the **Inbound Order Lines (whinh2110m000)** session, select the inbound order line for which you want to change the activities of the warehousing procedure.
- 2 From the *appropriate* menu of the **Inbound Order Lines (whinh2110m000)** session, select Create Order Line Activities or Order Line Activities to start the **Activities by Inbound Order Line (whinh2114m000)** session.
- 3 In the **Activities by Inbound Order Line (whinh2114m000)** session that appears, change the values of the following fields to adjust the activities for the selected order:
 - Automatic
 - Applicable
 - Output Device

Note that you can adjust both the inbound and the inspection procedures, because in this session the activities for both the inbound and the inspection procedures are displayed, provided that an inspection procedure is linked to the warehousing order type of the warehousing order header.

Outbound order lines To adjust the warehousing procedure for an individual outbound order line, proceed as follows:

- 1 In the **Outbound Order Lines (whinh2120m000)** session, select the outbound order line for which you want to change the activities of the warehousing procedure.
- 2 From the *appropriate* menu of the **Outbound Order Lines (whinh2120m000)** session, select Create Order Line Activities or Activities by Outbound Order Line to start the **Activities by Outbound Order Line (whinh2124m000)** session.
- 3 In the **Activities by Outbound Order Line (whinh2124m000)** session that appears, change the values of the following fields to adjust the activities for the selected order:
 - Automatic
 - Applicable
 - Output Device

Note: You can adjust both the outbound and the shipment procedure, because in this session the activities for both the outbound and the shipment procedures are displayed, if a shipment procedure is linked to the warehousing order type of the warehousing order header.

Essentially, you can change the settings of the Automatic, Applicable, and Output Device fields for an activity of an inbound or outbound order line as long as the activity is not being carried out, which is indicated by the status of the related inbound or outbound order line. However, there are various conditions that determine whether you can change the settings of these fields, and which settings you can change. For further information, see *To modify activities by order line*.

Note: If you change an originating order of a warehousing order, LN deletes the warehousing order or order line and replaces the order or order line with a new order or order line that includes the changes made for the originating order. Consequently, the activities for the deleted warehousing order are deleted as well and replaced with the default procedure, thus erasing any changes made to the activities.

Delete the activities of the warehousing procedure for individual order lines

You can delete the activities of the warehousing procedure of an inbound or outbound order line as long as the activity is not in progress. To delete the warehousing procedure for an individual order line, proceed as follows:

- 1 In the **Outbound Order Lines (whinh2120m000)** session or the **Inbound Order Lines (whinh2110m000)** session, select the outbound order line or the inbound order line for which you want to change the activities of the warehousing procedure.
- 2 In the **Outbound Order Lines (whinh2120m000)** session or the **Inbound Order Lines (whinh2110m000)** session, click **Delete Order Line Activities**.

Freeze and confirm combined or separate activities

Freezing and confirming shipments and loads is a combined activity performed in the **Freeze/Confirm Shipments/Loads (whinh4275m000)** session for shipment procedures created before LN version 2021.04. For these shipment procedures, you can split the combined activity into separate freeze and confirm activities.

Combined Freeze/Confirm Shipments/Loads activity

If freezing and confirming is a combined activity, shipments are automatically confirmed, without freezing, if you set this activity to automatic.

If not set to automatic performance, the **Freeze/Confirm Shipments/Loads (whinh4275m000)** session is started. In this session, you can confirm, or first freeze and then confirm shipments and loads.

If the shipment documents must be printed automatically, printing is started as soon as the status of the shipment or load changes from **Open** to **Frozen** or **Confirmed**, if the **Freeze/Confirm Shipments/Loads (whinh4275m000)** activity is set to automatic performance.

Split Freeze/Confirm Shipments/Loads into Freeze and Confirm activities

If required, you can convert the combined **Freeze/Confirm Shipments/Loads (whinh4275m000)** activity to these freeze and confirm activities:

- **Freeze**
- **Confirm**

Both activities are performed using the **Freeze/Confirm Shipments/Loads (whinh4275m000)** session.

To convert the freeze/confirm activity, select **Split Freeze/Confirm Shipments/Loads Activity** on the appropriate menu of these sessions:

- **Warehousing Order Types (whinh0110m000)**
- **Shipment Activities by Procedure (whinh0106m400)**
- **Warehousing Order Type (whinh0610m000)**

In this session, the conversion option is available in the header section and in the lines section of the Shipment Activities tab.

Note: The **Split Freeze/Confirm Shipments/Loads Activity** option is initially hidden. To make this option available, in the **Warehousing Order Type (whinh0610m000)** session, select Personalize Toolbar and from the Toolbar Preview, select **Split Freeze/Confirm Shipments/Loads Activity** below the Actions node and in the Properties pane, clear the **Hidden** check box. After restarting the **Warehousing Order Type (whinh0610m000)** session, the **Split Freeze/Confirm Shipments/Loads Activity** option is available.

Examples of warehousing procedures

This topic shows a few examples of warehousing procedures that you can define to meet the requirements of your warehouse.

Receipt Procedure

The simplest receipt procedure comprises only the mandatory activities, which, in addition, you can make LN perform automatically:

- Warehouse Receipt (whinh3512m000) If this activity is performed automatically, LN creates and confirms the receipt record.
- Generate Inbound Advice (whinh3201m000)
- Put Away Inbound Advice (whinh3203m000) (This activity is mandatory if you do not select the **Generate Storage List (whinh3415m000)** activity.)

More complex receipt procedures in your warehouse may require you to select more of the available activities of the **Activities by Procedure (whinh0106m000)** session and set these activities to manual performance in order to enable users to record any changes in quantities received, quantities stored, storage locations, and so on.

Of course, if your inbound goods flow includes inspections, you can also select the **Inspection Procedure**.

Outbound Procedure

The simplest outbound procedure comprises only the mandatory activities, which, in addition, you can make LN perform automatically:

- Generate Outbound Advice (whinh4201m000) (mandatory)
- Release Outbound Advice (whinh4202m000) (mandatory)

More complex outbound procedures in your warehouse may require you to select more of the available activities of the **Activities by Procedure (whinh0106m000)** session and set these activities to manual performance in order to enable users to record any changes in quantities issued, pick locations, and so on.

Note: In the **Activities by Procedure (whinh0106m000)** session, select the **Automatic** check box to make LN perform these activities automatically.

Chapter 3: Defining Warehousing Order Types

To define warehousing order types

Warehousing order types determine how warehousing orders are handled. Warehousing order types are classified by *inventory transaction type*. The inventory transaction type that you add to a warehousing order type determines the type of *warehousing procedure* that you can link to the warehousing order type. The activities that must be carried out in order to handle warehousing orders are, by default, determined by the warehousing procedures that are linked to the warehousing order types.

Warehousing order types are linked to warehousing orders when warehousing orders are generated from other packages or when you manually create a warehousing order in the **Warehousing Orders (whinh2100m000)** session.

Define warehousing order types

In the **Warehousing Order Types (whinh0110m000)** session, you can specify warehousing order types for the following *inventory-transaction types*:

- **Receipt**
Use a warehousing order type of inventory transaction type **Receipt** to receive goods in a warehouse. You can link a **Receipt Procedure** and, optionally, an **Inspection Procedure** to a warehousing order type of inventory transaction type **Receipt**.
- **Issue**
Use a warehousing order type of inventory transaction type **Issue** to issue goods from a warehouse. You can link a **Outbound Procedure** and a **Shipment Procedure** to a warehousing order type of inventory transaction type **Issue**. **Note:** LN allows you to modify the outbound order line data based on the value the Allow Updating Outbound Order Lines up to and including field is set to in the **Warehousing Order Types (whinh0110m000)** session.
- **Transfer**
Use a warehousing order type of inventory transaction type **Transfer** to transfer goods between warehouses, locations, business partners, projects, or work centers.
You must link these procedures to a warehousing order type of inventory transaction type **Transfer**:
 - **Receipt Procedure**
 - **Inspection Procedure**
 - **Outbound Procedure**
 - **Shipment Procedure**A transfer involves either one or two warehouses. If items are transferred between two different warehouses, all activities of the warehousing procedures must be carried out. However, if a transfer takes place between two locations within the same warehouse, the receipt activities are not carried out. You

can use transfer orders to define a replenishment system within a single warehouse. This system controls replenishment from bulk locations to pick locations. **Note:** LN allows you to modify the outbound order line data based on the value the Allow Updating Outbound Order Lines up to and including field is set to in the **Warehousing Order Types (whinh0110m000)** session.

- Inspections in LN Quality are possible for warehouse orders having order origin **Transfer (Manual)** only if the QM Implemented parameter is selected for the order type **Warehouse Transfer** in the **Quality Management Parameters (qmptc0100m000)** session.

- **WIP Transfer**

Use a warehousing order type of inventory transaction type **WIP Transfer** to transfer work from one costing work center to another.

Chapter 4: Activity Settings

Default activities by procedure

For each type of warehousing procedure, various activities are available. For each type of warehousing procedure, the following list shows the available activities.

Receipt Procedure

- Print Receipts (whinh3412m000)
- Warehouse Receipt (whinh3512m000) (mandatory) If this activity is performed automatically, LN creates and confirms the receipt record.
- Generate Inbound Advice (whinh3201m000) (mandatory)
- Generate Storage List (whinh3415m000)
- Storage List (whinh3525m100) If this activity is performed automatically, LN puts away the goods listed on the storage list.
- Put Away Inbound Advice (whinh3203m000) (This activity is mandatory if you do not select the **Generate Storage List (whinh3415m000)** activity.)

Note: The Generate Inbound Advice (whinh3201m000), Generate Storage List (whinh3415m000), and Storage List (whinh3525m100) activities are unavailable for warehouses without locations. For non-location controlled warehouses, LN skips the these activities and puts away the goods after the receipt of the goods is confirmed.

Inspection Procedure

- Warehouse Inspections Overview (whinh3122m000) (mandatory)
- Generate Inbound Advice (whinh3201m000) (mandatory)
- Generate Storage List (whinh3415m000)
- Storage List (whinh3525m100) If this activity is performed automatically, LN puts away the goods listed on the storage list.
- Put Away Inbound Advice (whinh3203m000)

Outbound Procedure

- Generate Outbound Advice (whinh4201m000) (mandatory)
- Release Outbound Advice (whinh4202m000) (mandatory)
- Generate Picking List (whinh4415m000)
- Picking List (whinh4525m100) If this activity is performed automatically, LN confirms picking of the goods listed on the picking list.
- Warehouse Inspections Overview (whinh3122m000)

Shipment Procedure

- **Freeze**
- **Confirm Shipments/Loads** (mandatory)
- Print Bills of Lading (whinh4470m000)
- Print Packing Slips (whinh4475m000)
- Print Packing Lists (whinh4476m000)
- Print Delivery Notes (whinh4477m000)
- Print Shipping Manifest (whinh4478m000)
- Process Pro Forma Invoices (whinh4279m000)

Freeze and confirm combined or separate activities

Freezing and confirming shipments and loads is a combined activity performed in the **Freeze/Confirm Shipments/Loads (whinh7245m000)** session for shipment procedures created before LN version 2021.04. If required, you can convert the combined freeze/confirm activity to separate freeze and confirm activities. See Freeze and confirm combined or separate activities.

Receipt activity settings

The following tables show the default settings for the **Applicable** and **Automatic** check boxes in the **Activities by Inbound Order Line (whinh2114m000)** session.

Receipt Procedure

Activity: Print Receipts (whinh3412m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Inbound Order Line (whinh2114m000)		Conditions
Applicable	Automatic	Applicable	Automatic	
Selected	Cleared	Cleared	Disabled	For cost or service items, which you would not normally print on a goods received note.
Selected	Cleared	Selected	Cleared	For physical items, cost, or service items that you must print on a goods received note.
Cleared	Cleared	Selected	Cleared	

Activity: Warehouse Receipt (whinh3512m000)

The settings for the **Warehouse Receipt (whinh3512m000)** session activity are not changed when copied from the **Activities by Warehousing Order (whinh2104m000)** session to the **Activities by Inbound Order Line (whinh2114m000)** session.

Activity: Generate Inbound Advice (whinh3201m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Inbound Order Line (whinh2114m000)		
Applicable	Automatic	Applicable	Automatic	Conditions
Selected; this setting is read-only.	Selected	Selected	Selected	Both item and warehouse are location controlled.
Selected; this setting is read-only.	Selected	Cleared	Cleared	Item or warehouse are not location controlled.
Selected; this setting is read-only.	Cleared	Selected	Cleared	Both item and warehouse are location controlled.
Selected; this setting is read-only.	Cleared	Cleared	Cleared	Item or warehouse are not location controlled.

Activity: Put Away Inbound Advice (whinh3203m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Inbound Order Line (whinh2114m000)		
Applicable	Automatic	Applicable	Automatic	Conditions
Selected	Selected	Selected	Selected	Both item and warehouse are location controlled.
Selected	Selected	Cleared	Cleared	Item or warehouse are not location controlled.
Selected	Cleared	Selected	Cleared	Both item and warehouse are location controlled.
Selected	Cleared	Cleared	Cleared	Item or warehouse are not location controlled.
Cleared	Cleared	Cleared	Cleared	

Activity: Generate Storage List (whinh3415m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Inbound Order Line (whinh2114m000)		
Applicable	Automatic	Applicable	Automatic	Conditions
Selected	Cleared	Selected	Cleared	Both item and warehouse are location controlled.
Selected	Cleared	Cleared	Cleared	Item or warehouse are not location controlled.
Cleared	Cleared	Cleared	Cleared	
Selected	Selected	Selected	Selected	Both item and warehouse are location controlled.

Activity: Generate Storage List (whinh3415m000)

Selected	Selected	Cleared	Cleared	Item or warehouse are not location controlled.
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Activity: Storage List (whinh3525m100)

Activities by Warehousing Order (whinh2104m000)	Activities by Inbound Order Line (whinh2114m000)
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Applicable	Automatic	Applicable	Automatic	Conditions
Selected	Cleared	Selected	Cleared	Both item and warehouse are location controlled.
Selected	Cleared	Cleared	Cleared	Item or warehouse are not location controlled.
Cleared	Cleared	Cleared	Cleared	
Selected	Selected	Selected	Selected	Both item and warehouse are location controlled.
Selected	Selected	Cleared	Cleared	Item or warehouse are not location controlled.

If the **Applicable** check box is cleared, the **Automatic** check box is disabled. If you select the **Applicable** check box, the **Automatic** check box is enabled.

Inspection activity settings

The following tables show the default settings for the **Applicable** and **Automatic** check boxes in the **Activities by Inbound Order Line (whinh2114m000)** session.

Inspection Procedure**Activity Put Away Inbound Advice (whinh3203m000)**

Activities by Warehousing Order (whinh2104m000)	Activities by Inbound Order Line (whinh2114m000)
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Applicable	Automatic	Applicable	Automatic	Conditions
Selected; this setting is read-only.	Cleared	Selected	Cleared	Both item and warehouse are location controlled.

Activity Put Away Inbound Advice (whinh3203m000)

Activities by Warehousing Order (whinh2104m000)	Activities by Inbound Order Line (whinh2114m000)
---	--

Activity Put Away Inbound Advice (whinh3203m000)

Applicable	Automatic	Applicable	Automatic	Conditions
Selected; this setting is read-only.	Selected	Selected	Selected	Both item and warehouse are location controlled.
Selected; this setting is read-only.	Selected	Cleared	Cleared	Item or warehouse are not location controlled.
Selected; this setting is read-only.	Cleared	Selected	Cleared	Both item and warehouse are location controlled.
Selected; this setting is read-only.	Cleared	Cleared	Cleared	Item or warehouse are not location controlled.
Cleared	Cleared	Cleared	Cleared	

Note: For the activities **Generate Inbound Advice (whinh3201m000)**, **Generate Storage List (whinh3415m000)**, and **Storage List (whinh3525m100)**, see Receipt activity settings.

Outbound activity settings

The following tables show the default settings for the **Applicable** and **Automatic** check boxes in the **Activities by Outbound Order Line (whinh2124m000)** session.

Outbound Procedure

Activity Generate Outbound Advice (whinh4201m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Outbound Order Line (whinh2124m000)		
Applicable	Automatic	Applicable	Automatic	Conditions
Selected; this setting is read-only.	Selected	Selected	Selected	Physical item.
Selected; this setting is read-only.	Cleared	Selected	Cleared	Physical item.
Selected; this setting is read-only.	Cleared	Cleared	Cleared	Cost or service item.

Activity Release Outbound Advice (whinh4202m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Outbound Order Line (whinh2124m000)		
Applicable	Automatic	Applicable	Automatic	Conditions

Activity Release Outbound Advice (whinh4202m000)

Selected; this setting is read-only.	Selected	Selected	Selected	Physical item.
Selected; this setting is read-only.	Cleared	Selected	Cleared	Physical item.
Selected; this setting is read-only.	Cleared	Cleared	Cleared	Cost or service item.

Activity Generate Picking List (whinh4415m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Outbound Order Line (whinh2124m000)		
Applicable	Automatic	Applicable	Automatic	Conditions
Selected	Selected	Selected	Selected	Physical item and no-return rejected goods for warehouses that are not WMS-controlled.
Selected	Cleared	Selected	Cleared	Physical item and no-return rejected goods for warehouses that are not WMS-controlled.
Selected	Cleared	Cleared	Cleared	Cost or service item or rejected goods to be returned for warehouses that are not WMS-controlled.

Activity Picking List (whinh4525m100)

Activities by Warehousing Order (whinh2104m000)		Activities by Outbound Order Line (whinh2124m000)		
Applicable	Automatic	Applicable	Automatic	Conditions
Selected	Selected	Selected	Selected	Physical item and no-return rejected goods for warehouses that are not WMS-controlled.
Selected	Cleared	Selected	Cleared	Physical item and no-return rejected goods for warehouses that are not WMS-controlled.
Selected	Cleared	Cleared	Cleared	Cost or service item or rejected goods to be returned for warehouses that are not WMS-controlled.
Cleared	Cleared	Cleared	Cleared	

Activity Warehouse Inspections Overview (whinh3122m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Outbound Order Line (whinh2124m000)		
Applicable	Automatic	Applicable	Automatic	Conditions

Activity Warehouse Inspections Overview (whinh3122m000)

Selected	Cleared; this setting is read-only.	Selected	Cleared	Physical item and no-return rejected goods for warehouses that are not WMS-controlled.
Selected	Cleared; this setting is read-only.	Cleared	Cleared	Cost or service item or rejected goods to be returned for warehouses that are not WMS-controlled.
Cleared	Cleared	Cleared	Cleared	The Return Quarantine Inventory Payable to Supplier check box is selected in the Warehousing Orders (whinh2100m000) session.

Shipment activity settings

The following tables show the default settings for the **Applicable** and **Automatic** check boxes in the **Activities by Outbound Order Line (whinh2124m000)** session.

Shipment Procedure**Activity Freeze/Confirm Shipments/Loads (whinh4275m000)**

Activities by Warehousing Order (whinh2104m000)		Activities by Outbound Order Line (whinh2124m000)		
Applicable	Automatic	Applicable	Automatic	Conditions
Selected; this setting is read-only.	Selected	Selected	Selected	Shipment is applicable.
Selected; this setting is read-only.	Selected	Cleared	Cleared	Shipment is not applicable. See the following note.
Selected; this setting is read-only.	Cleared	Selected	Cleared	Shipment is applicable.
Selected; this setting is read-only.	Cleared	Cleared	Cleared	Shipment is not applicable. See the following note.

Note:

Shipment is not applicable in the following situations:

- The goods are moved to a work center by means of a production order, an assembly order, or a maintenance work order.
- The goods are moved from one location to another in the same warehouse by means of an internal transfer order.

Activity Print Bills of Lading (whinh4470m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Outbound Order Line (whinh2124m000)		
Applicable	Automatic	Applicable	Automatic	Conditions
Selected	Selected	Selected	Selected	
Selected	Cleared	Selected	Cleared	
Cleared	Cleared	Cleared	Cleared	

Activity Print Packing Lists (whinh4476m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Outbound Order Line (whinh2124m000)		
Applicable	Automatic	Applicable	Automatic	Conditions
Selected	Selected	Selected	Selected	
Selected	Cleared	Selected	Cleared	
Cleared	Cleared	Cleared	Cleared	

Activity Print Packing Slips (whinh4475m000)

Activities by Warehousing Order (whinh2104m000)		Activities by Outbound Order Line (whinh2124m000)		
Applicable	Automatic	Applicable	Automatic	Conditions
Selected	Selected	Selected	Selected	
Selected	Cleared	Selected	Cleared	
Cleared	Cleared	Cleared	Cleared	

Default values for order line activities

The following tables show the values for the **Applicable** and **Automatic** check boxes for each activity in the **Activities by Warehousing Order (whinh2104m000)** session and the order lines activities sessions **Activities by Inbound Order Line (whinh2114m000)** and **Activities by Outbound Order Line (whinh2124m000)**. For each value specified in the **Activities by Warehousing Order (whinh2104m000)** session, ERP LN 6.1 provides a default value in the relevant lines activities session when the activities are copied from the **Activities by Warehousing Order (whinh2104m000)** to the relevant order lines activities session.

Receipt Procedure

Receipt activity settings

Inspection Procedure

Inspection activity settings

Outbound Procedure

Outbound activity settings

Shipment Procedure

Shipment activity settings

Chapter 5: Modifying Activity Settings

To modify activities by order line

For each activity of an inbound or outbound order line, one or more conditions determine whether you can change the settings of the Applicable and Automatic fields, and what settings you can change.

To change order line activities for the receipt procedure

The following tables list the conditions that determine whether you can change the settings of the Applicable and Automatic fields, and what settings you can change, for activities of the receipt procedure for inbound order lines.

Activity Print Receipts (whinh3412m000)			
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	Only if the status of the inbound order line is Open .
	Selected	Cleared	Only if the status of the inbound order line is Open and the goods received not has not yet been printed.
Automatic	Cleared	Selected	Only if the status of the inbound order line is Open .
	Selected	Cleared	Only if the status of the inbound order line is Open and the goods received not has not yet been printed.

Activity Warehouse Receipt (whinh3512m000)			
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	The Warehouse Receipt (whinh3512m000) session is mandatory for the Receipt Procedure . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
Automatic	Cleared	Selected	Only if no receipt lines exist.
	Selected	Cleared	Only if no receipt lines exist.

Activity Generate Inbound Advice (whinh3201m000)			
Check box	Change from	To	Condition/information
Applica-ble	Cleared	Selected	The Generate Inbound Advice (whinh3201m000) session is mandatory for the Receipt Procedure . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
Automat-ic	Cleared	Selected	Only if no confirmed receipt lines exist.
	Selected	Cleared	Only if no confirmed receipt lines exist.
Activity Put Away Inbound Advice (whinh3203m000)			
Check box	Change from	To	Condition/information
Applica-ble	Cleared	Selected	This check box is automatically cleared and read-only if the Generate Storage List (whinh3415m000) activity is set to not applicable.
	Selected	Cleared	This check box is automatically selected and read-only if the Generate Storage List (whinh3415m000) activity is set to applicable.
Automat-ic	Cleared	Selected	Only if no inbound advice lines exist.
	Selected	Cleared	Only if no inbound advice lines exist.
Activity Generate Storage List (whinh3415m000)			
Check box	Change from	To	Condition/information
Applica-ble	Cleared	Selected	Only if the status of the inbound order line is not beyond Received .
	Selected	Cleared	Only if the status of the inbound order line is not beyond Received .
Automat-ic	Cleared	Selected	Only if no inbound advice lines exist.
	Selected	Cleared	Only if no inbound advice lines exist.
Activity Storage List (whinh3525m100)			
Check box	Change from	To	Condition/information
Applica-ble	Cleared	Selected	This check box is automatically cleared and read-only if the Generate Storage List (whinh3415m000) activity is set to applicable.
	Selected	Cleared	This check box is automatically selected and read-only if the Generate Storage List (whinh3415m000) activity is set to not applicable.

Activity Storage List (whinh3525m100)			
Check box	Change from	To	Condition/information
Automatic	Cleared	Selected	Only if no inbound advice lines exist.
	Selected	Cleared	Only if no inbound advice lines exist.

To change order line activities for the inspection procedure

The following tables list the conditions that determine whether you can change the settings of the Applicable and Automatic fields, and what settings you can change, for activities of the inspection procedure for inbound order lines.

Activity Warehouse Inspections Overview (whinh3122m000)			
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	The Warehouse Inspections Overview (whinh3122m000) session is selected by default. Therefore, you cannot change this check box from cleared to selected.
	Selected	Cleared	The Warehouse Inspections Overview (whinh3122m000) activity is mandatory for the Inspection Procedure . If you clear this check box, the other activities of the Inspection Procedure become cleared and read-only (which means that the inspection procedure is not used for the selected order line).
Automatic	Cleared	Selected	This setting is cleared and unavailable.
	Selected	Cleared	See the previous explanation.

Activity Generate Inbound Advice (whinh3201m000)			
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	The Generate Inbound Advice (whinh3201m000) session is mandatory for the Inspection Procedure . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.

Activity Generate Inbound Advice (whinh3201m000)			
Check box	Change from	To	Condition/information
Automat-ic	Cleared	Selected	Only if no inspection lines exist.
	Selected	Cleared	Only if no inspection lines exist.
Activity Put Away Inbound Advice (whinh3203m000)			
Check box	Change from	To	Condition/information
Applica-ble	Cleared	Selected	This check box is automatically cleared and read-only if both the item and the warehouse are location controlled and the Generate Storage List (whinh3415m000) activity is set to not applicable.
	Selected	Cleared	This check box is automatically selected and read-only if both the item and the warehouse are location controlled and the Generate Storage List (whinh3415m000) activity is set to applicable.
Automat-ic	Cleared	Selected	Only if no inspection lines exist.
	Selected	Cleared	Only if no inspection lines exist.
Activity Generate Storage List (whinh3415m000)			
Check box	Change from	To	Condition/information
Applica-ble	Cleared	Selected	Only if no inbound advice lines exist.
	Selected	Cleared	Only if no inbound advice lines exist.
Automat-ic	Cleared	Selected	Only if no inbound advice lines exist.
	Selected	Cleared	Only if no inbound advice lines exist.
Activity Storage List (whinh3525m100)			
Check box	Change from	To	Condition/information
Applica-ble	Cleared	Selected	This check box is automatically cleared and read-only if the Generate Storage List (whinh3415m000) activity is set to applicable.
	Selected	Cleared	This check box is automatically selected and read-only if the Generate Storage List (whinh3415m000) activity is set to not applicable.

Activity Storage List (whinh3525m100)			
Check box	Change from	To	Condition/information
Automatic	Cleared	Selected	Only if no inbound advice lines exist.
	Selected	Cleared	Only if no inbound advice lines exist.

To change order line activities for the outbound procedure

The following tables list the conditions that determine whether you can change the settings of the Applicable and Automatic fields, and what settings you can change, for activities of the outbound procedure for outbound order lines.

Activity Generate Outbound Advice (whinh4201m000)			
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	The Generate Outbound Advice (whinh4201m000) session is mandatory for the Outbound Procedure . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
Automatic	Cleared	Selected	See the previous condition.
	Selected	Cleared	See the previous condition.

Activity Release Outbound Advice (whinh4202m000)			
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	The Release Outbound Advice (whinh4202m000) session is mandatory for the Outbound Procedure . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
Automatic	Cleared	Selected	Only if no outbound advice lines exist.
	Selected	Cleared	Only if no outbound advice lines exist.

Activity Generate Picking List (whinh4415m000)			
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	Only if no outbound advice lines exist.
	Selected	Cleared	Only if no outbound advice lines exist.
Automatic	Cleared	Selected	Only if no outbound advice lines exist.
	Selected	Cleared	Only if no outbound advice lines exist.

Activity Picking List (whinh4525m100)			
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	This check box is automatically cleared and read-only if the Generate Picking List (whinh4415m000) activity is set to applicable.
	Selected	Cleared	This check box is automatically selected and read-only if the Generate Picking List (whinh4415m000) activity is set to not applicable.
Automatic	Cleared	Selected	Only if no outbound advice lines exist.
	Selected	Cleared	Only if no outbound advice lines exist.

Activity Warehouse Inspections Overview (whinh3122m000)			
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	The Generate Outbound Advice (whinh4201m000) session is mandatory for the Outbound Procedure . Therefore, this check box is selected and read-only.
	Selected	Cleared	See the previous condition.
Automatic	Cleared	Selected	See the previous condition.
	Selected	Cleared	See the previous condition.

To change activities for the shipment procedure

The following tables list the conditions that determine whether you can change the settings of the Applicable and Automatic fields, and what settings you can change, for activities of the shipment procedure for outbound order lines.

Activity Freeze/Confirm Shipments/Loads (whinh4275m000)			
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	The Freeze/Confirm Shipments/Loads (whinh4275m000) session is mandatory for the Shipment Procedure . Therefore, this check box is selected and read-only.
	Selected	Cleared	The Freeze/Confirm Shipments/Loads (whinh4275m000) session is mandatory for the Shipment Procedure . Therefore, this check box is selected and read-only.
Automatic	Cleared	Selected	Only if no shipment lines exist.
	Selected	Cleared	Only if no shipment lines exist.

Activity	<ul style="list-style-type: none"> • Print Bills of Lading (whinh4470m000) • Print Packing Lists (whinh4476m000) • Print Packing Slips (whinh4475m000) • Print Delivery Notes (whinh4477m000) 		
Check box	Change from	To	Condition/information
Applicable	Cleared	Selected	Only if no confirmed or frozen shipment lines exist.
	Selected	Cleared	Only if no confirmed or frozen shipment lines exist.
Automatic	Cleared	Selected	Only if no confirmed or frozen shipment lines exist.
	Selected	Cleared	Only if no confirmed or frozen shipment lines exist.

Chapter 6: Planned Status

Planned status for warehousing orders and order lines

For each *warehousing order type*, you can determine whether the initial status of the warehousing orders and inbound and/or outbound order lines must be **Planned** or **Open**. In some cases, however, the originating order determines the initial status of a warehousing order.

Initial status of warehousing orders determined by originFor warehousing orders originating from the following packages, the originating package determines whether the initial status is **Planned** or **Open**:

- **Service**
- **Maintenance Sales**
- **Maintenance Work**
- **JSC Production**
- **Production Schedule**
- **ASC Production**
- **Production Kanban**

The **Planned** status is meant for order data entry, you cannot process planned warehousing orders. To make a planned warehousing order available for order processing, you must activate the warehousing order. An activated warehousing order obtains the **Open** status. If Warehousing is integrated with a Warehouse Management System, activated warehousing orders are automatically uploaded to the WMS system for processing.

For a newly created warehousing order line with the **Planned** status, you can:

- Define *advance shipment notices*
- Create *freight orders*
- Create *cross-dock orders*
- Generate *handling units*
- Specify Inventory commitment

In addition, for planned warehousing orders, LN:

- Generates *planned inventory transactions*
- Checks whether planned order lines are *blocked* or marked as *rush orders*.
- Creates history records

Setting parameters for the **Planned** statusIn the **Warehousing Order Types (whinh0110m000)** session:

- To specify that new inbound order lines obtain the **Planned** status, select the **Generate Planned Inbound Order Lines** check box.

- To specify that new outbound order lines obtain the **Planned** status, select the **Generate Planned Outbound Order Lines** check box.

New inbound or outbound order lines are either generated from other packages or created manually.

How to activate **Planned** warehousing orders To activate warehousing orders with the **Planned** status, you can use the **Activate Warehousing Orders (whinh2203m000)** session to activate a range of warehousing orders, or you can select individual orders and click **Activate**. The **Activate** option is available in the following sessions:

- **Warehousing Orders (whinh2100m000)**
- **Warehousing Order (whinh2100m100)**
- **Warehouse Manager Dashboard (whinh2300m000)**

In the **Activate Warehousing Orders (whinh2203m000)** session, you can also deactivate manually created warehousing orders.

Note that after you have activated a planned warehousing order for which the first activity is set to Automatic, you must use the Process button to trigger automatic processing or manually perform the first activity. For more information, refer to Inbound and outbound procedures.

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