

Configure warehouses and replenishment

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Use this page to configure the warehouse structure and stock-flow rules that control where inventory is stored, moved, replenished, and dispatched.

What warehouse and replenishment configuration controls

A warehouse is the inventory structure you administer. Locations describe where stock is held;

routes and rules describe how it moves; operation types describe how a stock operation is handled;

storage categories and putaway rules control capacity and destinations; reordering rules and

replenishment control stock supply; and GiB plate records support GiB e-Dispatch configuration.

If you need to...	Go to
Create or change a warehouse or location	Configure warehouses and locations
Decide where a route can be used and how a rule acts	Configure routes, rules, and operation types
Set storage capacity or direct arrivals to a location	Configure storage capacity and putaway
Set minimum and maximum stock or replenish a line	Configure replenishment and reordering
Maintain plate numbers for GiB e-Dispatch	Configure GiB plate numbers
Learn how to reach a destination from the application menu	Navigation basics
Configure products, packages, or package types	Configure products, packages, and delivery
Configure inventory operations and transfers	Configure inventory overview and transfers

If you need to...	Go to
Review inventory reports	Configure inventory reporting

Before you start

Prerequisites

Have this ready	Why it matters
The warehouse, location, product, route, operation type, storage category, or plate record you need to change	It identifies the configuration task.
Shipment steps, resupply relationships, location usage, route applicability, rule action, operation code, storage limits, replenishment thresholds, and plate information	These choices determine which configuration branches you use.
Access to the required configuration areas	Warehouse configuration, shipment settings, resupply, technical information, routes, rules, storage, and location fields can be limited by access groups.
Values that must be entered together	A rule can require a source location for its action; a putaway row requires either a product or a product category when no package type is selected; and capacity rows require either a product or a package type.
An editable record state	Have the record ready to open or change.

The application can show different areas for advanced locations, multiple locations, multiple warehouses, tracking lots, multiple companies, and technical access. Use the fields and tabs that appear for your access rather than assuming every configuration area is available.

Find and open a configuration record

Each destination has a list; some destinations also have a form. Use the task you are performing to choose the destination.

Prerequisites

- Know which configuration record you need.
- Have access to the corresponding Inventory configuration area.

Steps

1. Open the application menu.
2. Choose the destination that matches your task.

If you need to...	Open
Manage warehouse records	Warehouses
Manage stock locations	Locations
Define stock-flow routes	Routes
Define route rules	Rules
Define operation behavior	Operations Types
Direct incoming products	Putaway Rules
Set storage limits	Storage Categories
Set stock thresholds	Reordering Rules
Maintain dispatch plate records	GiB Plate Numbers

3. Open an existing row to change its record, or begin a new record from the destination list.
4. If the list is empty, use the message shown for that destination as your starting point:

Destination	Empty-state message
Warehouses	Define a new warehouse
Locations	Add a new location
Routes	Add a new route
Operations Types	No transfer found. Let's create one! or Create a new operation type
Putaway Rules	No putaway rule found. Let's create one!
Storage Categories	Add a new storage category
Reordering Rules	No reordering rule found

Result: The selected list or record is on screen, ready for configuration.

Understand the configuration screens

The configuration surfaces combine record fields, conditional groups, tabs, embedded rows, and editable lists. The areas you see depend on access and on values such as usage, action, operation code, trigger, and whether another field has been selected.

Note: The areas shown depend on access and on values selected in the record.

Screen	Areas to use
Warehouses	The record identity fields; Warehouse Configuration with Shipments and Resupply ; Technical Information with locations and operation types
Locations	Additional Information , Cyclic Counting , Logistics , and the external note field; Putaway Rules and Current Stock actions
Routes	Applicable On with product, category, packaging, and warehouse choices; embedded Rules rows
Rules	Action, source and destination locations, applicability, propagation, and options
Operations Types	General and Hardware tabs; reservation, return, location, lot, package, and print settings
Putaway Rules	Editable rows for incoming location, product or category, package type, outgoing location, storage category, and company
Storage Categories	Capacity by Package and Capacity by Product tabs with editable capacity rows
Reordering Rules	Editable stock-planning rows with quantities, locations, routes, triggers, and replenishment actions
GIB Plate Numbers	An editable list and a form with plate type and plate number

Result: You have identified the configuration area to use. Open **Warehouses** or **Locations** to begin the structure setup.

Configure warehouses and locations

Configure the warehouse and location structure used to organize inventory, including shipment, resupply, usage, counting, logistics, putaway, and stock areas.

Prerequisites

- Have the warehouse name, code, company, responsible partner, shipment steps, and resupply relationship ready.
- For a location, know its name, parent location, usage, company, and whether it is a scrap, return, replenishment, or counting location.
- Have the access needed for multiple locations, multiple warehouses, advanced locations, or storage categories when those areas are required.

Steps

1. Open **Warehouses**.
2. Open an existing warehouse or start a new warehouse record.
3. Open **Warehouse Configuration**.
4. In **Shipments**, choose the reception and delivery steps.
5. In **Resupply**, select the warehouses that resupply this warehouse when multiple warehouses are available.
6. Use **Routes** on the warehouse when you need to review its routes.
7. Open **Locations**.
8. Open an existing location or start a new location record.
9. In **Additional Information**, complete the fields that appear for the location's usage, including storage category, company, scrap, return, and replenishment settings.
10. In **Cyclic Counting**, set the counting frequency and dates when the location is internal or transit and a company is present.
11. In **Logistics**, choose the removal strategy when the field is available for the location.
12. Use **Putaway Rules** to open the rules associated with the location.
13. Use **Current Stock** to open the current stock view for the location.

Result: The warehouse or location record is on screen with the applicable structure, shipment, resupply, usage, counting, logistics, putaway, and stock areas.

Open **Routes** next when the warehouse flow needs route behavior.

Configure routes, rules, and operation types

Set route applicability, rule actions and locations, and operation-type reservation, return, location, lot, package, and print settings.

Prerequisites

- Know whether the route applies to product categories, products, packages, or warehouses.
- Know the rule action, source location, destination location, operation type, propagation choice, and delay.
- Know the operation code, reservation method, return type, default locations, lot and package behavior, and print settings.

Steps

1. Open **Routes**.
2. Open an existing route or start a new route.
3. In **Applicable On**, select the places where the route can be selected.
4. Select **Warehouses** when the route applies to warehouses.
5. Add the applicable warehouse records when the warehouse selector appears.
6. In **Rules**, add or edit a rule row with its action, source location, and destination location.
7. Open **Rules** when you need a rule outside a route.
8. Choose the rule action.
9. Complete the source location when the action is pull, push, or pull-push.
10. Complete the fields that appear for the selected action.
11. Open **Operations Types**.
12. Open an operation type or start a new operation type.
13. On **General**, choose the operation code and reservation settings.

14. Complete the return, default location, backorder, lot, and package settings that appear for the operation code and access.
15. Open **Hardware** when the operation code is incoming, outgoing, or internal.
16. Choose the print settings that apply, then choose the label format when its print option is enabled.

Result: The route, rule, or operation type is on screen with the branch-specific choices and rows required for the selected stock flow.

Open **Storage Categories** next when the flow needs storage capacity or putaway behavior.

Configure storage capacity and putaway

Set storage capacity and direct arriving products, categories, and packages to destination locations.

Prerequisites

- Know the incoming and destination locations.
- Choose whether the rule applies to a product, product category, or package type.
- Have the capacity quantity and unit information ready.

Steps

1. Open **Storage Categories**.
2. Open a storage category or start a new one.
3. Enter the category name and choose whether new products are allowed.
4. Enter the maximum weight when a maximum weight applies.
5. Open **Capacity by Package** when package capacity applies.
6. Add a package type and its quantity in the capacity row.
7. Open **Capacity by Product** when product capacity applies.
8. Add a product and its quantity in the capacity row.
9. Open **Putaway Rules**.
10. Add an editable rule row.
11. In **When product arrives in**, select the location where the product arrives.

12. Select **Product**, **Product Category**, or **Package type** for the rule.
13. Select the destination location when the product must be stored there.
14. Select **Having Category** when the rule uses a storage category.

The product and category choices are conditional: when no category or package type is selected,

the product is required; when no product or package type is selected, the category is required.

The outgoing location becomes available after an incoming location is selected.

Result: The storage category or putaway row is on screen with its capacity or destination choices.

Open **Reordering Rules** next when the flow needs stock thresholds.

Configure replenishment and reordering

Set product stock thresholds and use replenishment choices for a warehouse or location.

Prerequisites

- Know the product, warehouse or location, route, minimum quantity, maximum quantity, quantity multiple, and trigger.
- Use **Reordering Rules** for saved threshold rules.
- Use the replenishment list for the current manual replenishment view.

Steps

1. Open **Reordering Rules**.
2. Open an existing rule or start a new rule.
3. Select the product.
4. Enter the minimum and maximum quantities.
5. Enter **Quantity Multiple** when orders must use a quantity multiple.
6. Select the warehouse and location when those fields are available.
7. Select the route and trigger for the rule.

8. Open the replenishment view.

If no replenishment is needed, the page displays **You are good, no replenishment to perform!** .

9. Review the on-hand quantity, forecast quantity, quantity to order, and visible planning fields.

10. Choose the stock-planning detail you need:

If you need to...	Select
Review the forecast	Forecast Report
Read replenishment details	Replenishment Information

11. Choose the action that matches the replenishment decision:

If you need to...	Reader action
Create an order now when the quantity to order is greater than zero	Select Order Once
Make replenishment automatic when the quantity to order is greater than zero and the trigger is not automatic	Select Automate
Defer a line that uses a manual trigger	Select Snooze

12. Open the rule form and select **Run the scheduler** when you need to trigger reordering now.

13. Select **Forecast Description** from the rule form when the forecast explanation is available.

The replenishment view uses manual-trigger and not-snoozed filters. **Order Once** and **Automate**

depend on a positive quantity to order; **Automate** also depends on a non-automatic trigger; and

Snooze depends on a manual trigger.

Result: The replenishment list or reordering rule is on screen with the applicable threshold, forecast, trigger, and action choices.

Open **GiB e-Dispatch** next when you need to maintain plate numbers.

Configure GiB plate numbers

Maintain plate number and plate-number type records for GiB e-Dispatch.

Prerequisites

- Have the plate number and plate-number type ready.
- Have access to **GiB e-Dispatch** and **GiB Plate Numbers**.

Steps

1. Open **GiB e-Dispatch**.
2. Open **GiB Plate Numbers**.
3. Add a row in the editable list, or open the form.
4. Select the plate-number type.
5. Enter the value in the `Plate Number` field.

Result: The GiB Plate Numbers list or form is on screen with the plate type and plate number fields.

If a configuration destination does not open, continue with the troubleshooting checks below.

When a configuration area is not visible

If opening a warehouse-configuration destination returns to

`https://demo.sherkety.org/web#action=apps_menu` , the destination has not opened.

Reordering Rules and **GiB Plate Numbers** can retain their requested URLs while showing none of the expected labels.

What you see	What to do
<code>Warehouses</code> is not on screen	Return to the application menu and use Navigation basics to reopen the destination.
<code>Locations</code> , <code>Routes</code> , <code>Rules</code> , <code>Operations Types</code> , <code>Putaway Rules</code> , or <code>Storage Categories</code> is not on screen	Use the corresponding destination in Navigation basics , then check which configuration areas appear for your access.
<code>Reordering Rules</code> , <code>Order Once</code> , <code>Automate</code> , or <code>Snooze</code> is not on screen	Reopen the Reordering Rules destination and inspect the line's quantity-to-order and trigger values.
<code>GiB Plate Numbers</code> or <code>GiB Plate Number</code> is not on screen	Reopen GiB e-Dispatch and GiB Plate Numbers from the application menu.

What you see	What to do
The page remains blank	Stop looking for a field on that page and resolve the destination or access path first.

Result: The destination outcome is identified, and you can continue with the related inventory configuration task when the destination opens.

What to configure next

After warehouse configuration, use the related administrative pages for the records that feed or

consume it. [Configure products, packages, and delivery](#)

covers product and package data used by putaway and storage choices. [Configure inventory overview](#)

[and transfers](#) covers the

operations that use warehouses, locations, routes, and operation types. [Configure inventory](#)

[reporting](#) covers the reports that read

inventory movement and stock information.

For replenishment, the configured rule provides the threshold and trigger choices used by the

replenishment view. **Run the scheduler** is the available form action for triggering reordering

now.

Result: You know which related page to open after setting warehouse structure, stock-flow

rules, storage behavior, or replenishment thresholds.