

Warehouses and replenishment

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Warehouses and replenishment

Use this page to configure the warehouse structure, the rules that direct stock through locations, putaway destinations, replenishment thresholds, storage capacity, and GiB plate records.

Warehouses and replenishment

Warehouse configuration defines where stock is held and how it moves.

Replenishment configuration

sets the quantities and actions used to restore stock. Together, these settings support the

operational work in Inventory that follows setup.

If you need to...	Go to
Set warehouse locations, routes, rules, or operation types	Configure the warehouse flow
Direct arriving products to storage and set replenishment quantities	Configure putaway and replenishment
Set capacity limits or maintain plate records	Configure storage capacity and GiB plate numbers
Choose fields that appear only for a particular setup	Handle configuration branches
Continue with stock movement work	Inventory transfers and returns
Review the inventory entry point	Inventory overview
Configure products and packages used by these rules	Products, packages and delivery
Review the resulting inventory information	Inventory reporting
Administer this configuration area	Configure warehouses and replenishment

Before you start

Prerequisites

- You have access to the Inventory configuration entries for the records you need to maintain.
- You know which warehouses, locations, routes, rules, operation types, storage categories, putaway rules, reordering rules, and plate records your company needs.
- You know which company, warehouse, location, product, and package choices belong in each record.
- You know whether advanced location, multiple-warehouse, storage-category, or tracking-lot access applies to the work.

The available fields depend on the selected usage, operation code, company, warehouse, and access groups. A field can be mandatory only when the relevant configuration makes it applicable. Check the condition beside each field before entering a value.

The configuration screens have conditional rules for source and destination locations, cyclic counting, storage capacity rows, rule locations, and operation-type locations. Access groups also control warehouse configuration, technical warehouse information, multiple locations, advanced locations, and storage categories.

Find a configuration record

Steps

1. Open **Inventory**.
2. Open **Configuration**.
3. Open the configuration area that matches your task.

If you need to...	Open
Maintain warehouse structure	Warehouse Management

If you need to...	Open
Maintain GiB plate records	GiB e-Dispatch , then GiB Plate Numbers
Maintain replenishment thresholds	Products , then Reordering Rules
Maintain locations, routes, rules, operation types, putaway rules, or storage categories	The corresponding entry under Warehouse Management

4. Select an existing record to open it.

Result: The selected configuration list or record is open for the next task.

Understand the configuration screens

Each configuration surface is a list or form for one part of the warehouse flow. The available

forms group identity, locations, rules, quantities, capacity, and plate information; the lists

provide filters, groupings, and related actions.

Configure the warehouse flow

A warehouse is the top-level stock structure. Locations identify where stock is held, routes and

rules direct movement between locations, and operation types describe the handling operation.

Prerequisites

- You have decided the warehouse, location, company, route, rule, and operation-type structure.
- You know the source and destination locations for each movement.

Steps

1. Open the warehouse configuration list.
2. Open an existing warehouse record.
3. Enter the warehouse identity, company, partner, reception, delivery, and resupply values.
4. Set the warehouse's location values for stock, input, quality, packing, and output where those fields are available.

5. Open the location configuration list.
6. Enter the location name, parent location, usage, company, and location options.
7. Open the route configuration list.
8. Set the route applicability choices for product categories, products, packagings, and warehouses.
9. Enter each route rule's sequence, action, source location, and destination location.
10. Open the rule configuration list.
11. Enter the rule action, picking type, source and destination locations, automatic behaviour, procurement method, route, warehouse, propagation choices, and delay.
12. Open the operation-type configuration list.
13. Set the operation type's code, warehouse, reservation method, return settings, backorder setting, default locations, lot handling, package handling, and print choices.

Use these controls when they appear on the relevant lists or forms:

Configuration work	Available controls
Warehouse list	Routes, Archived
Location list	Putaway Rules, Current Stock, Archived, Internal, Customer, Production, Vendor
Route form	Product Categories, Products, Packagings
Rule list	Archived, Route, Warehouse

Result: The warehouse-flow records contain the structure and movement choices needed by the configured operation types.

Configure putaway and replenishment

A putaway rule directs arriving stock to a storage destination. A reordering rule sets the stock levels and actions that prompt replenishment work.

Prerequisites

- The warehouse and locations used by the rule exist.

- You know the product, category, package type, destination, minimum quantity, maximum quantity, and quantity multiple for the rule.

Steps

1. Open **Putaway Rules**.
2. Use **Filters** to narrow the list when needed.
3. Use **Group By** to group the list when needed.
4. Enter the arrival location, product or category, package types, storage destination, storage category, and company values.
5. Open **Reordering Rules**.
6. Enter the product, location, warehouse, route, trigger, group, minimum quantity, maximum quantity, quantity multiple, and company values.
7. Review the on-hand quantity, forecast quantity, visibility days, quantity to order, and unit information.
8. Choose the replenishment action you need.

If you need to...	Select
Review the forecast	Forecast Report
Review replenishment details	Replenishment Information
Place one order	Order Once
Automate the action	Automate
Defer the action	Snooze

Result: The putaway rule directs arriving stock to its configured destination, and the reordering rule holds the thresholds and replenishment action for the selected product and location.

Configure storage capacity and GiB plate numbers

A storage category groups capacity settings for locations. A GiB plate number record identifies a plate used by GiB e-Dispatch.

Prerequisites

- You know the maximum weight and unit for each storage category.
- You know whether the capacity applies to a package type or a product.
- You have the plate type and plate number information required for GiB e-Dispatch.

Steps

1. Open **Storage Categories**.
2. Enter the category name, capacity option, maximum weight, unit, and company values.
3. Choose the capacity type.

If capacity applies to...	Enter
A package type	The package-capacity values
A product	The product-capacity values

4. Select **Locations** to move from the storage category to its related locations when that action is available.
5. Open **GiB Plate Numbers**.
6. Enter the plate type and plate number.

Package capacity depends on the applicable tracking-lot access. Product capacity is listed separately from package capacity.

Result: Storage capacity records and GiB plate-number records contain the values needed by their related Inventory and e-Dispatch work.

Handle configuration branches

Configuration branches determine which choices and fields apply to the record you are creating or editing. The branch can depend on the access group, location usage, company,

operation code, route choice, or warehouse choice.

Note: Your access and company configuration determine which choices appear on a form.

When this applies	What changes
Advanced location or multiple-warehouse access applies	Warehouse configuration choices are available.
A location uses internal or transit usage and has a company	Cyclic inventory fields can appear.
A location uses internal usage and the storage-category access applies	Storage-category choices can appear.
A rule uses pull, push, or pull-and-push action	Source-location choices can appear.
An operation type uses an internal, outgoing, or incoming code	The applicable source, destination, hardware, and print choices can appear.
A route allows warehouse selection	Warehouse choices can appear on the route.
A capacity row is subject to its access condition	Its required state depends on the applicable configuration.

Steps

1. Select the company and usage values that match the stock location.
2. Select the operation code that matches the operation type.
3. Review the fields that appear after the selection.
4. Complete fields that the selected branch makes mandatory.

Result: The form shows the choices applicable to the selected company, usage, operation code, access, and warehouse configuration.

When configuration does not work

Use the symptom, meaning, and action below when a configuration task stops.

What you see	What it means	What to do
A field or action does not appear.	Its company, usage, operation code, access group, or	Review the branch rules in Handle configuration branches .

What you see	What it means	What to do
	warehouse condition may not apply.	
A required combination is refused.	The selected rule, operation code, capacity condition, or location condition requires a related value.	Review the applicable source and destination, operation, or capacity choices before saving.
The form has no validation, confirmation, or error text for the action.	No message is available to guide the next move.	Check the required combination and the applicable access and branch conditions before trying again.

Messages

The Help message reads: "Define a new warehouse".

Help message: "Define a new warehouse".

Class	Message
Help	Define a minimum stock rule so that Flectra automatically creates requests for quotations or confirmed manufacturing orders to resupply your stock.

What to do next

After the warehouse structure, movement rules, storage destinations, replenishment rules, and plate records are configured, continue with the Inventory work that uses those settings.

Next need	Continue with
Review the Inventory entry point	Inventory overview
Process receipts, deliveries, transfers, or returns	Inventory transfers and returns
Complete product and package setup	Products, packages and delivery
Review movement, valuation, or stock information	Inventory reporting
Restrict or troubleshoot configuration access	Configure warehouses and replenishment

This configuration page has no lifecycle stages or transitions. Continue with the Inventory page that matches the work you need to perform.