SIKICH

User and Setup Guide

Note: This Add-on is available in English (United States) only. Please contact Sikich if you are interested in localizing the solution to your region.

SIKICH®

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Overview

The WMS Data Collection for solution provides a simple to use user interface to perform complex warehouse processes using Microsoft Dynamics 365 Business Central warehouse management functions. The screens are optimized to fit on small devices that can be used by employees in the warehouse with minimal keyboard entry. Prompts will direct the employee on how to perform the task.

There are screens that will fit various device sizes with special screen displays for tablets vs. small screens such as phones.

Navigating

The Home screen of the WMS Operator will have role center cue's showing the following activities:

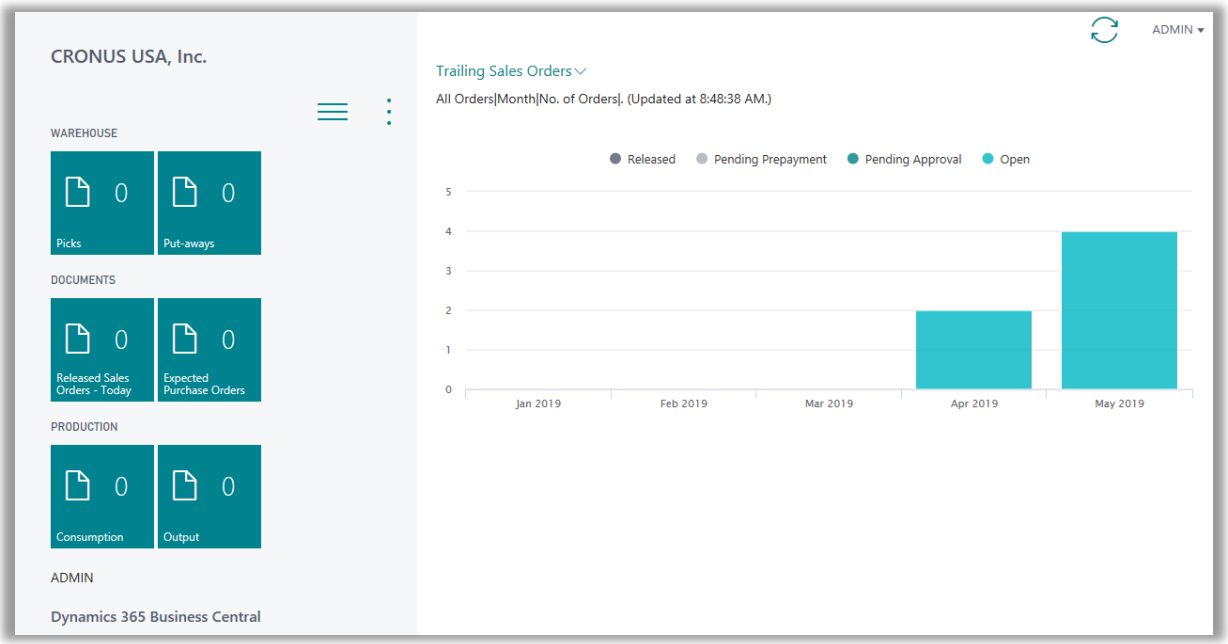
- Picks
- Put away
- Expected Purchase Orders
- Released Sales Orders
- Registered Picks
- Registered Put-Aways
- Consumption
- Output

If you would like to remove particular cues you may change the setting in the WMS data collection setup under page control.

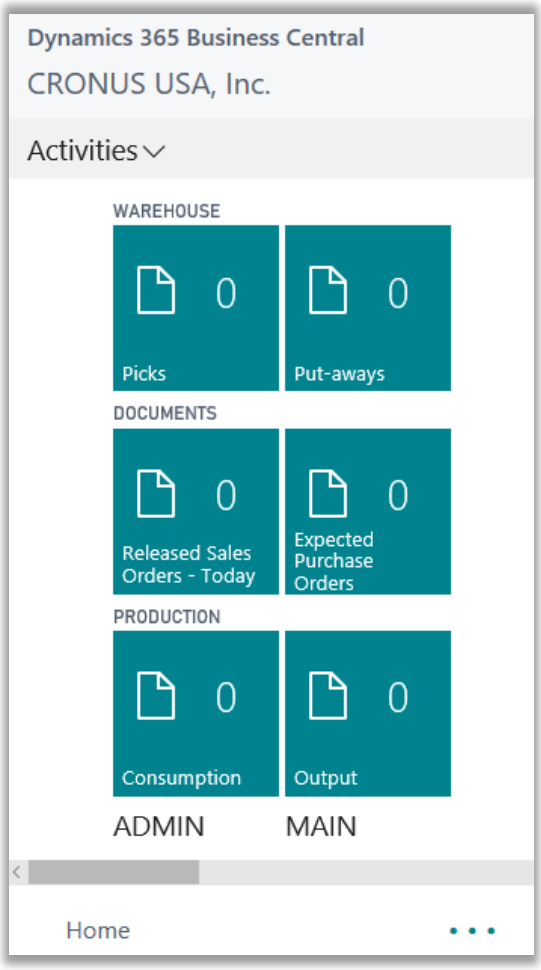
From the activities dropdown you can perform:

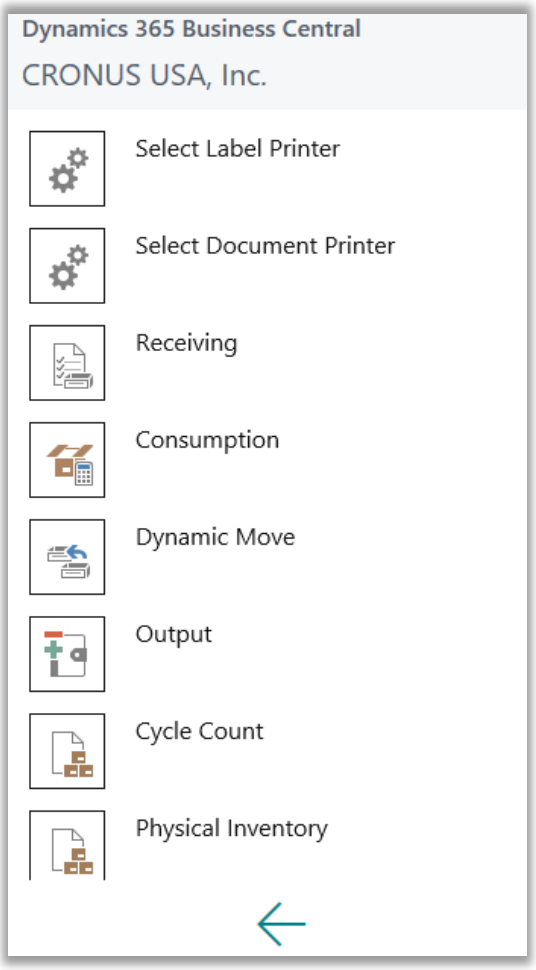
- Picking
- Put-Away
- Receiving
- Find Items
- Dynamic moves
- Bin Content (List)
- Cycle Count
- Consumption
- Output
- Select Label Printer
- Pack Out
- Stage Cart
- WMS Data Collection Version

HOME SCREEN (TABLET)



HOME SCREEN (SMART PHONE OR SMALLER DEVICE)

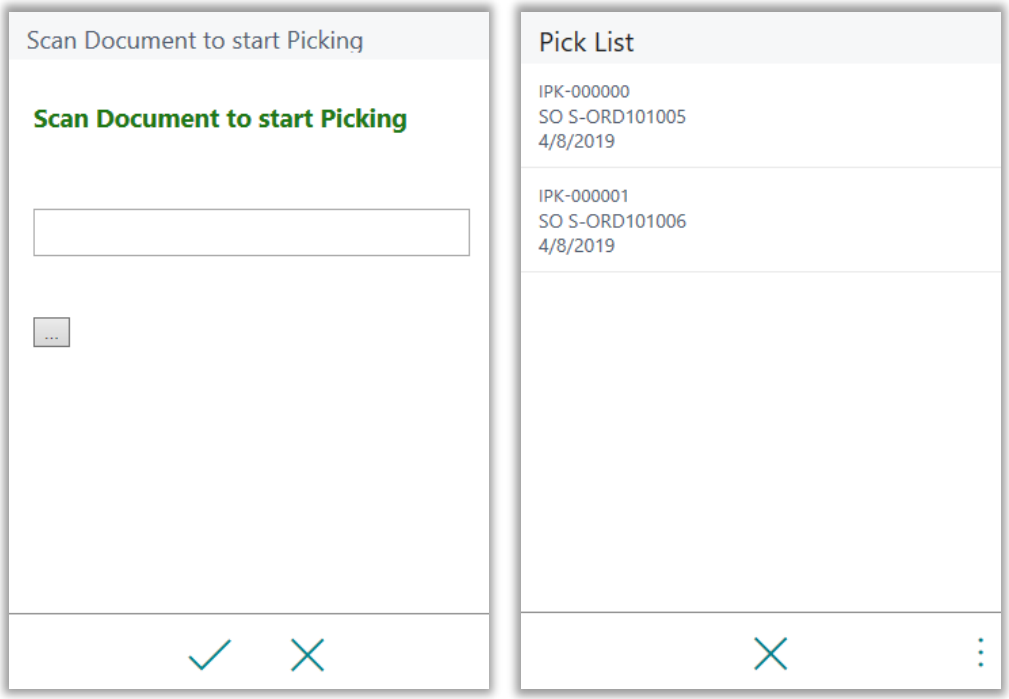




PICKING

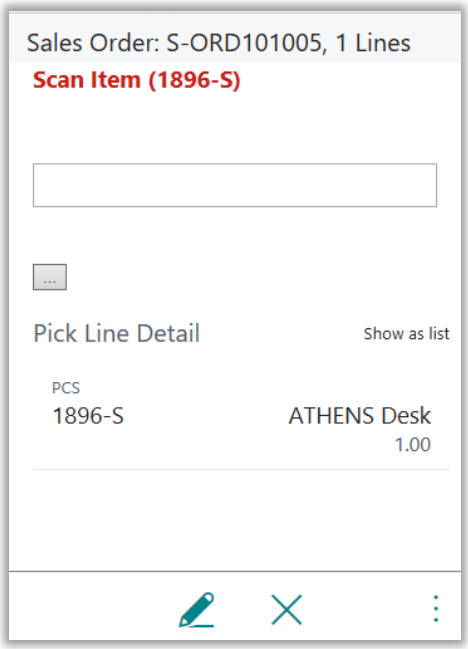
Clicking on the Picking action will show a document selection screen. Clicking the ellipsis (...) will show a list of documents.

Scan, enter, or lookup and select the document to pick.



- Picks that are Assigned to the User ID that is logged in OR are not assigned to any user will be displayed
- Click on a row to open the Pick Line action screen.

Prompts will appear in Red in the Action Instructions to tell the warehouse employee what to do. The pick screen will walk the warehouse employee through picking all the items. The warehouse employee will scan/enter confirmation at each prompt to complete the task.



The actual prompts that appear and the order they appear in are configurable by a system administrator. Typically, the warehouse employee will:

- Scan the item on the pick or enter them in manually
- Enter the quantity you are picking
- Scan the bin that the item is in
- Enter the Lot or Serial No. (if they are required)

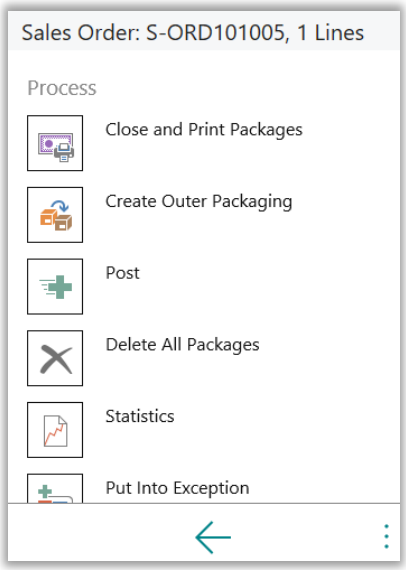
Note: If you need to go back a field enter in a minus sign on the field and it will bring you to the last prompt

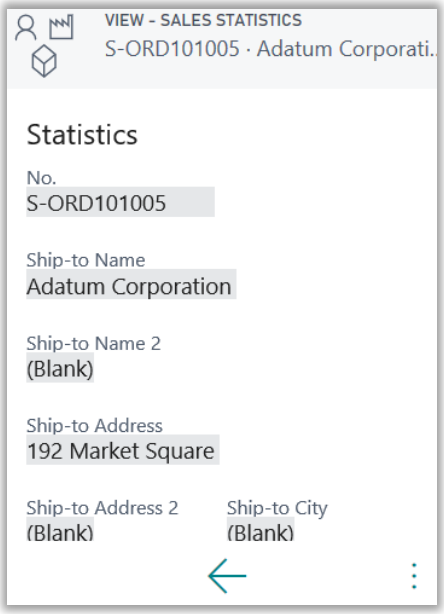
The warehouse employee will run through each line on the pick. When they are complete with the pick, they will click the Post action. That will register the pick and put them back at the beginning where they can scan or select another pick. The pick they were working on will be gone.

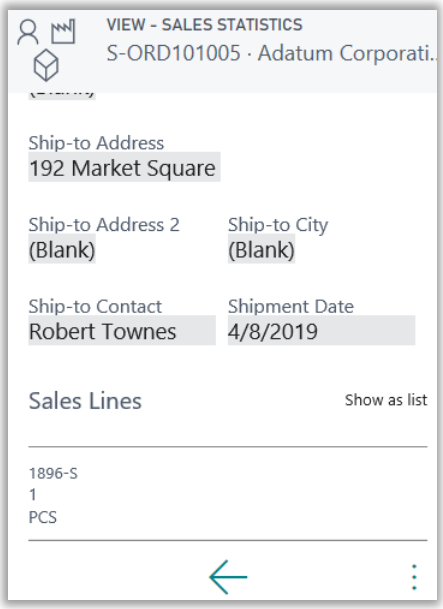
The unit of measure being picked can be changed (i.e. pick a pallet instead of a quantity of cases) from the Change UOM action.

If a picture of the item being picked has been loaded into the item record can be seen by clicking the Picture action.

Information about the document being picked (Sale Order, Transfer Order, etc.) can be seen by clicking the statistics action.



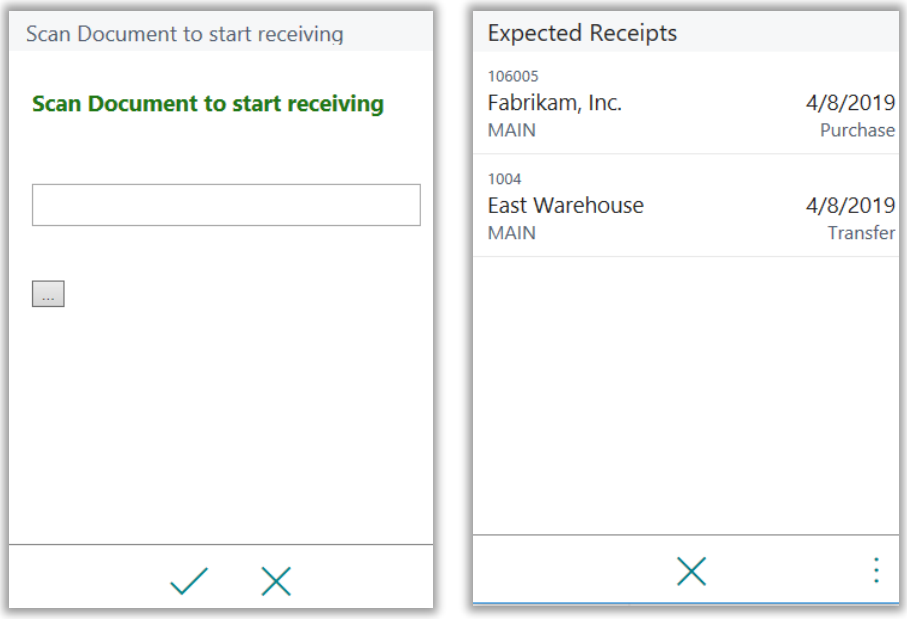




RECEIVING

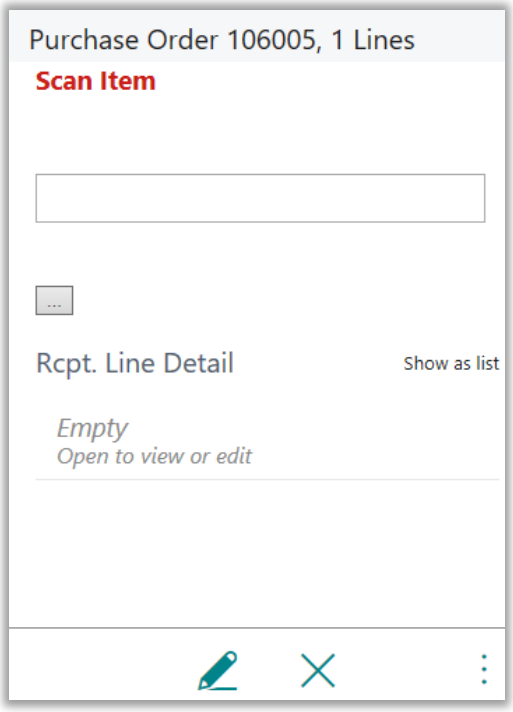
Clicking on the Receiving action will show a document selection screen. Clicking the ellipsis (...) will show a list of documents.

Scan, enter, or lookup and select the document to receive.



The action instructions will show in red for the warehouse employee to enter in the required information. The specific field prompts and order are configurable by a system administrator. Typically, the employee will enter

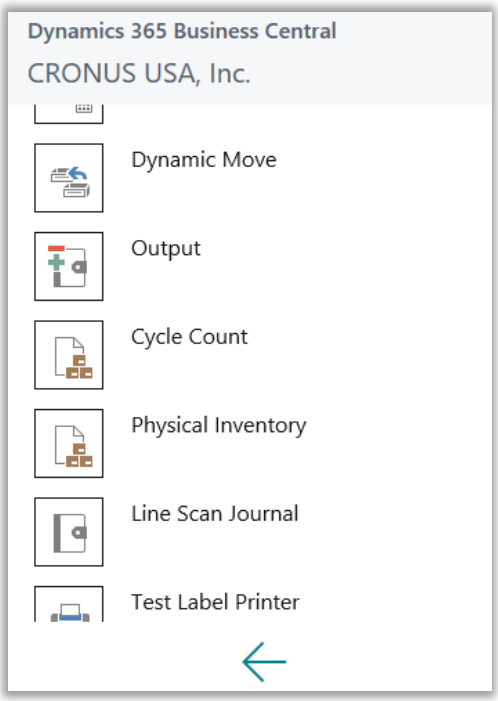
- Scan the Item or enter the Item No.
- Enter the Quantity to receive.
- Scan or enter the Bin Code of the item
- If the item is lot or serial tracked, prompts will also show.

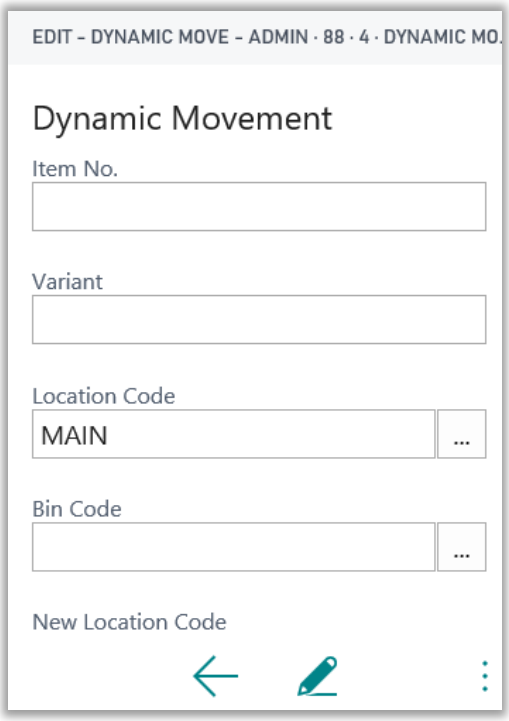


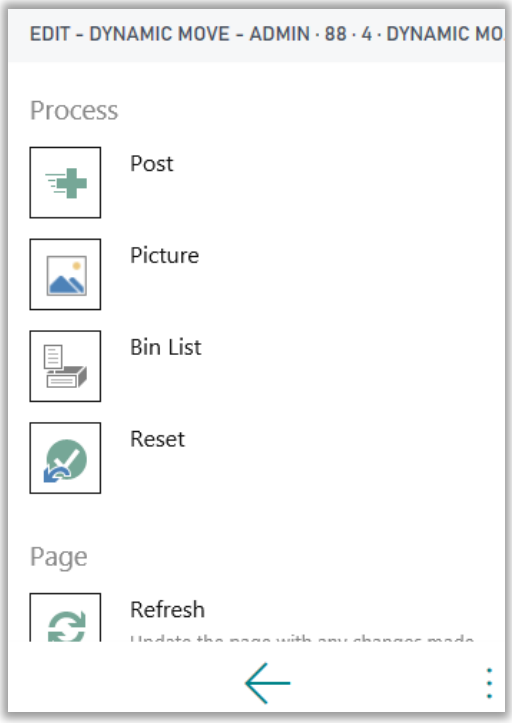
- Scanning the items will automatically create warehouse documents required based on the setup of the location.
- The receiving can handle unexpected purchase receipt goods as well as over-receiving.

DYNAMIC MOVEMENT

Warehouse Employees can perform a warehouse movement from the WMS Client. Select the Dynamic Movement button under the activities tab.







A dynamic movement can move items from one bin to another in the same location or between different locations.

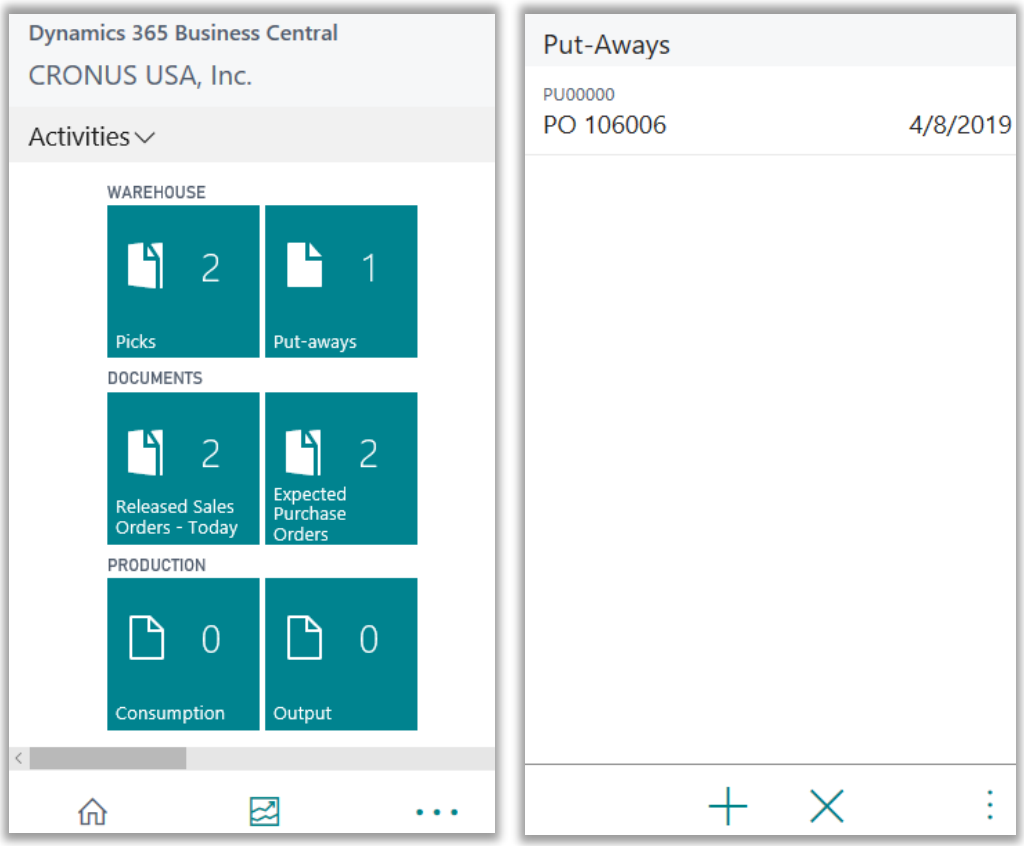
The warehouse employee will

- Scan or enter the Item No.
- Scan or enter the Bin Code that the item is in
- Scan or enter the Bin Code that you are moving the item to
- Select the location of the bin
- Enter the quantity that is being moved from bin to bin.
- When ready to commit the change, click the action button to post. The purchase order will be posted and a put-away will be created.
- The picture action button will show a picture of the item if one is loaded into the item card
- The Bin List action button will show a list of the bin contents that the item is in the warehouse.

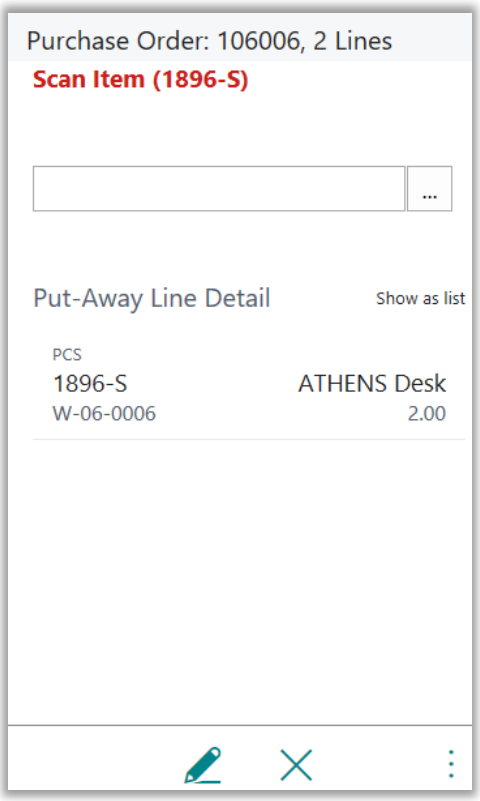
PUT-AWAY

Once a Purchase Order has been received, if the warehouse is setup as directed pick/put then a Put-Away will be created and will need to be processed.

A count of Put-Aways that are either un-assigned or directly assigned to the employee will show on the home page. Put-Aways can be accessed by clicking the count or by clicking the put-away action. The warehouse employee selects a put-away by clicking the No. they want to select.



Prompts will appear in Red in the Action Instructions to tell the warehouse employee what to do. The screen will walk the warehouse employee through put-away of all the items. The warehouse employee will scan/enter confirmation at each prompt to complete the task.



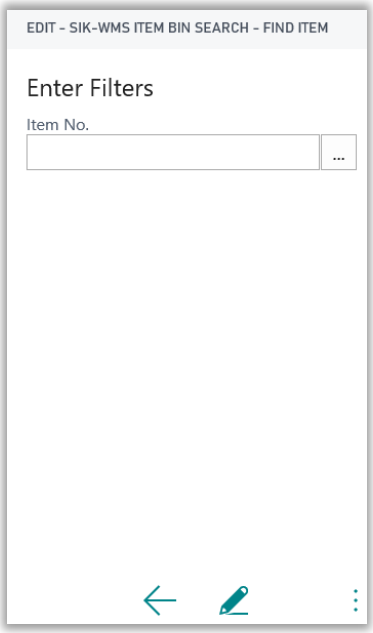
- Scan the item on the put-away or enter them in manually
- Enter the quantity you are putting away
- Scan the bin that the item is being PUT into. A bin will be suggested based on the put-away templates. This suggestion can be over-ridden. Even the quantity being put into the bin can be over-ridden and placed into multiple bin locations.
- Enter the Lot or Serial No. if they are required

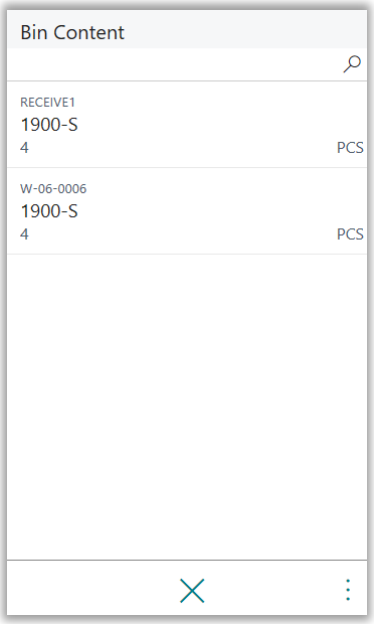
Note: If you need to go back a field enter in a minus sign on the field and it will bring you to the last prompt

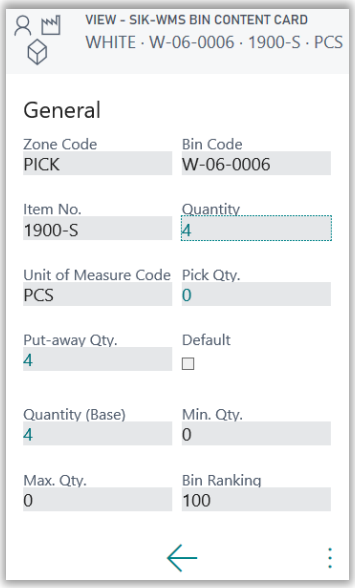
FIND ITEM

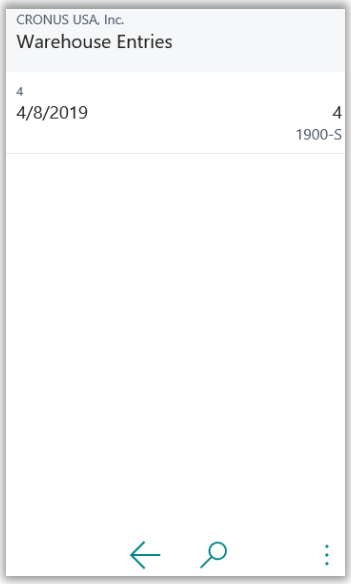
Navigate to find item under the activities list on the home screen

- Scan or enter the Item No.
- The different bin contents will be shown for that item.
- You can drill into the Quantity number and see all the warehouse entries for that bin item





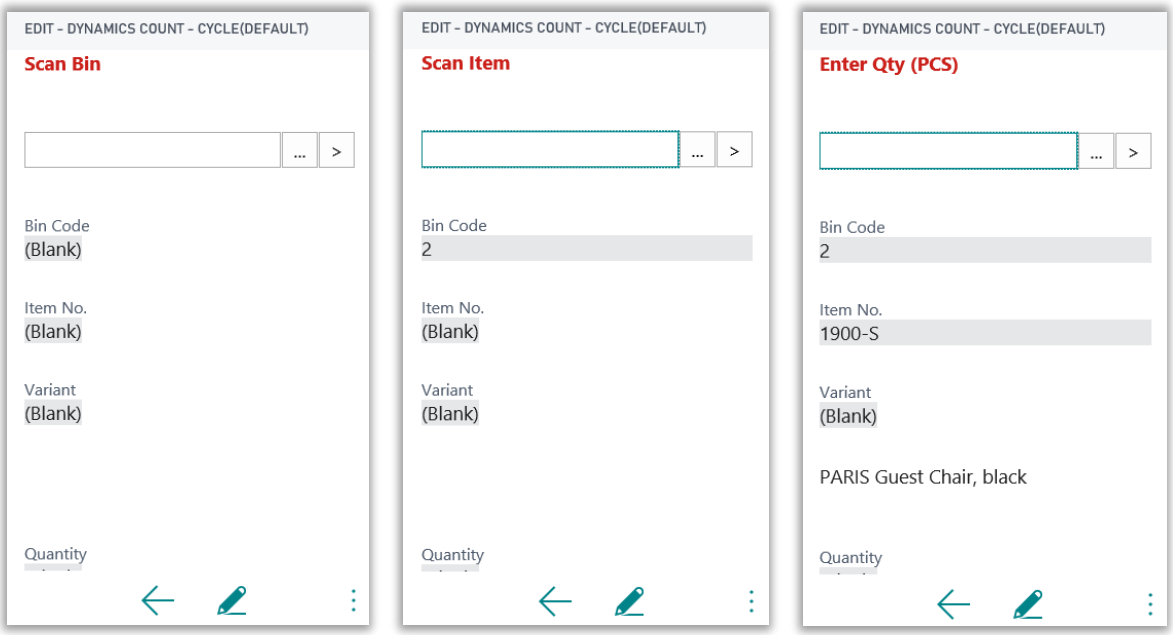




CYCLE COUNT

Cycle counts can be done by clicking the Cycle Count Action on the main screen

Prompts will appear in Red in the Action Instructions to tell the warehouse employee what to do.



- Enter or Scan the Bin
- Enter or Scan the Item being counted
- Enter the quantity counted.
- If the item is lot or serial tracked, enter or scan

After the last prompt is filled in, the screen will clear and be back at the bin code. The warehouse employee will continue to scan items. Each item count is saved in the physical cycle journals. A manager will post the actual adjustments after the counts have been reviewed.

Once the item has been entered, there are actions that will be available

The Unit of Measure will default to the unit of measure that the item is in the bin. The count can be changed to perform counts on multiple unit of measures.

Picture will show a picture of the item that is being counted.

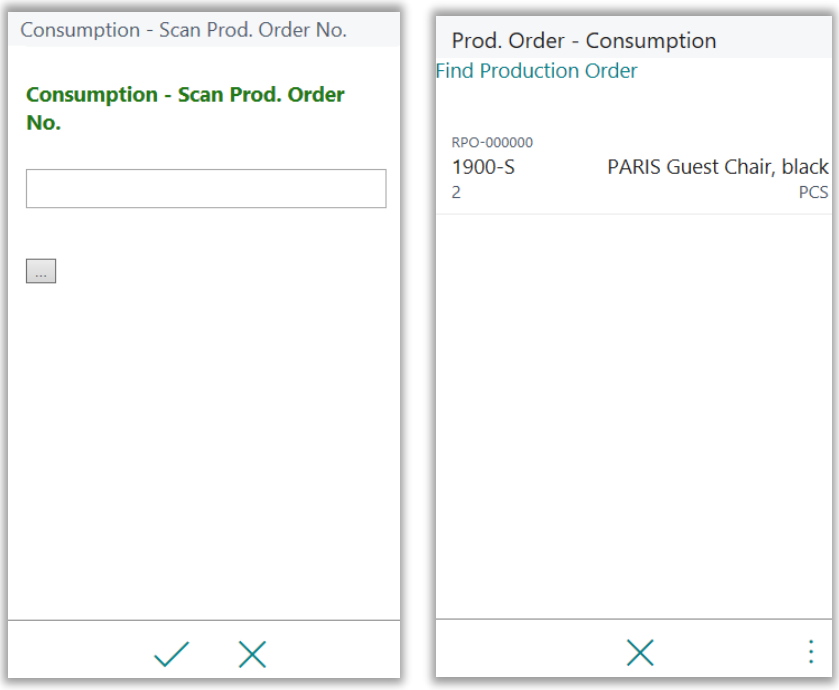
Bin Contents will display what items are in the bin being counted.

Statistics will show information about the item including any counts that have been already recorded and are waiting to be posted.

CONSUMPTION

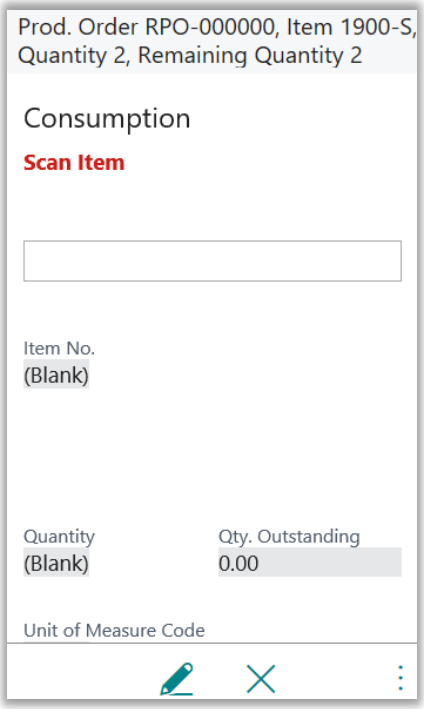
Warehouse Employees can report component consumption against production orders from the WMS Data Collection client. Clicking on the Consumption action will show a document selection screen. Clicking the ellipsis (...) will show a list of documents.

Scan, enter, or lookup and select the document to receive.



Clicking on the Production Order No. will bring up the Production order screen.

Prompts will appear in Red in the Action Instructions to tell the warehouse employee what to do.

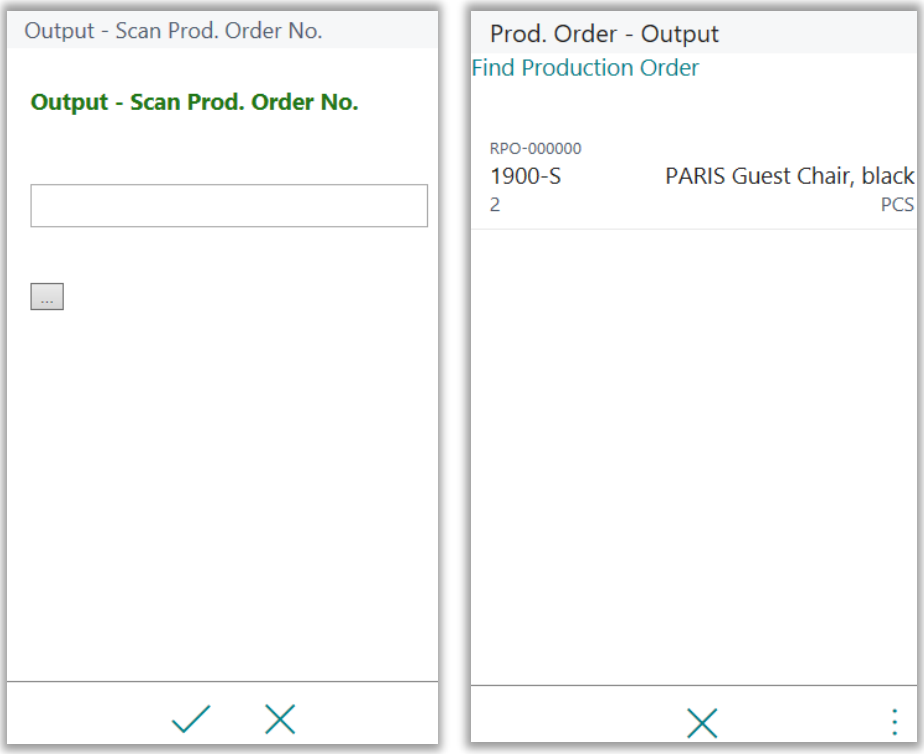


- Scan/Enter Item Number
- Enter Quantity
- At the end of each item entry the warehouse employee will process the production order on the actions. This will post the consumption of the component.

OUTPUT

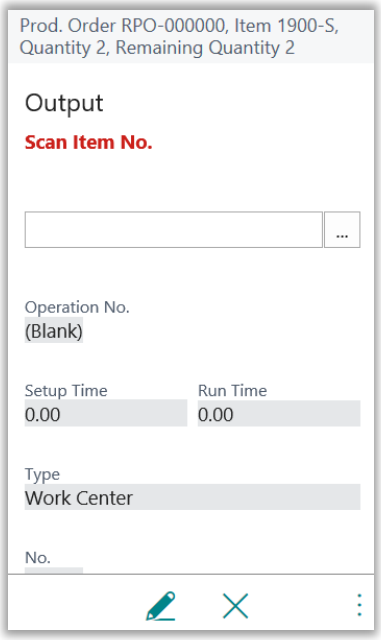
Warehouse Employees can report production output and run time against production orders from the WMS Data Collection client. Clicking on the Output action will show a document selection screen. Clicking the ellipsis (...) will show a list of documents.

Scan, enter, or lookup and select the document to receive.



Clicking on the Production Order No. will bring up the Output Entry Screen

Prompts will appear in Red in the Action Instructions to tell the warehouse employee what to do.



The actual fields and order of the prompts can be configured by a system administrator. Typically, the employee will enter:

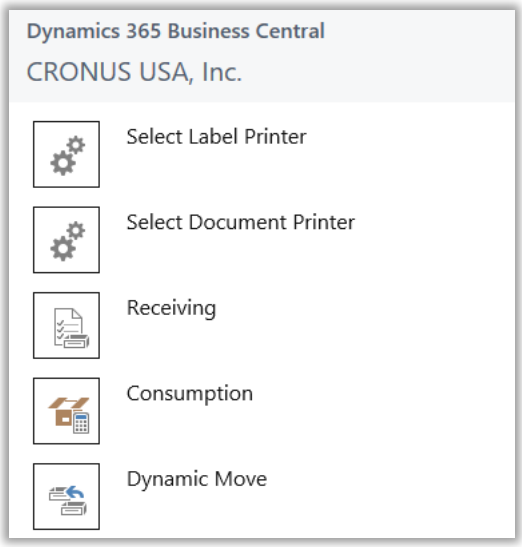
- Enter or Scan the operation step
- Enter the Setup Time (can be zero)
- Enter the Run Time (can be zero)
- Enter the Output Quantity (can be zero)
- Enter the Scrap Quantity (can be zero)
- When complete, Process the production order from the actions.

Key Usage Scenarios

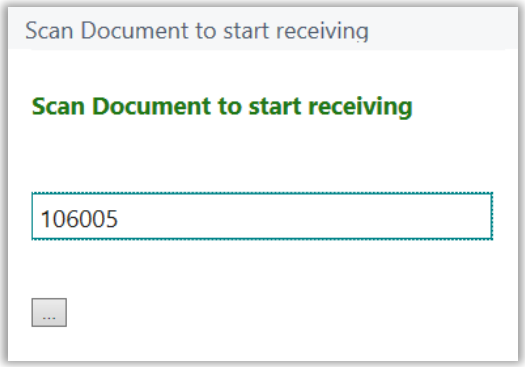
The following section will outline some key usage scenarios.

RECEIVING

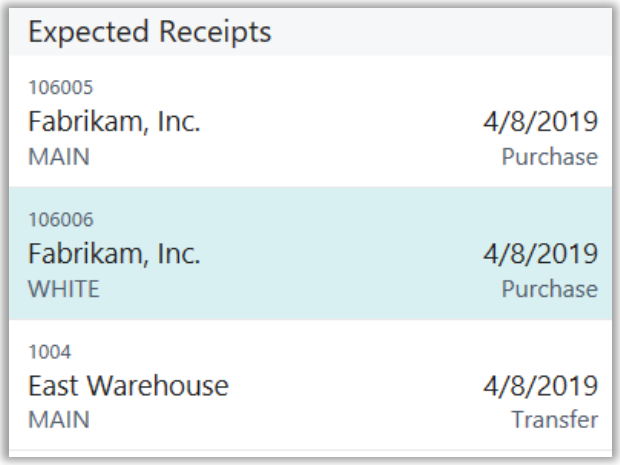
1. To begin receiving through the wireless WMS data collection system, first you will need to solicit a purchase document to receive against.
2. From the Activities menu, select the “Receiving” function.



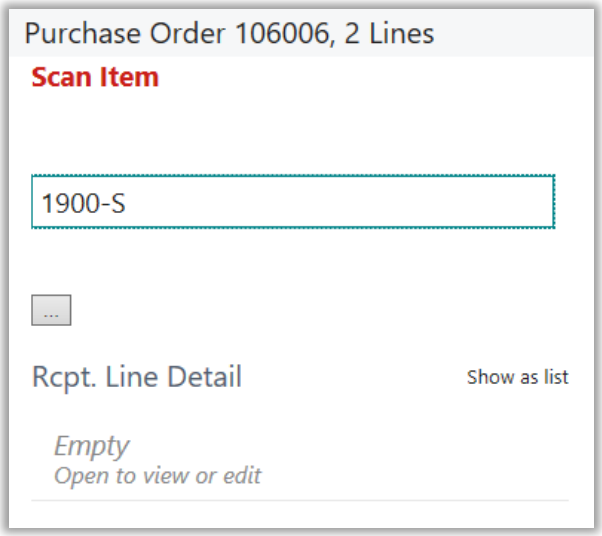
3. Scan your document no.
    a. If you are not sure of your document no.,, you can view the purchase list by selecting the Ellipsis button next to the input prompt.



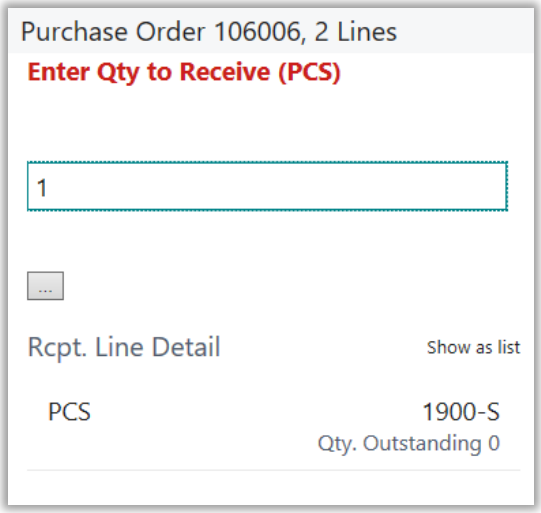
You can search and select for your document from a purchase list by pressing the ellipsis (…)



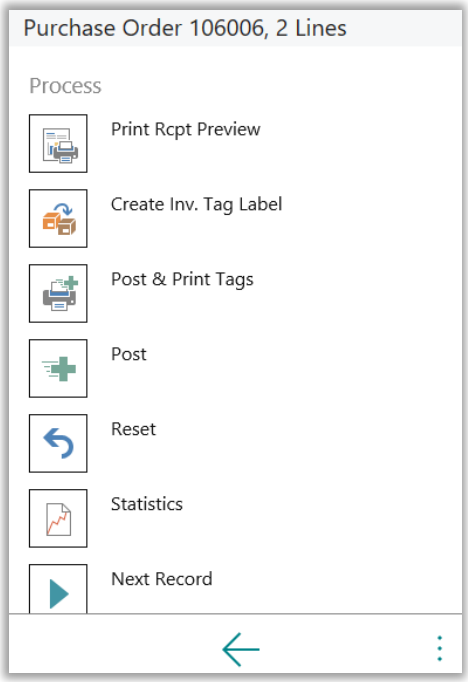
4. Once you have selected your desired document, you can begin collecting information against the document.
    a. The first prompt will appear to scan the item you are receiving against the document.



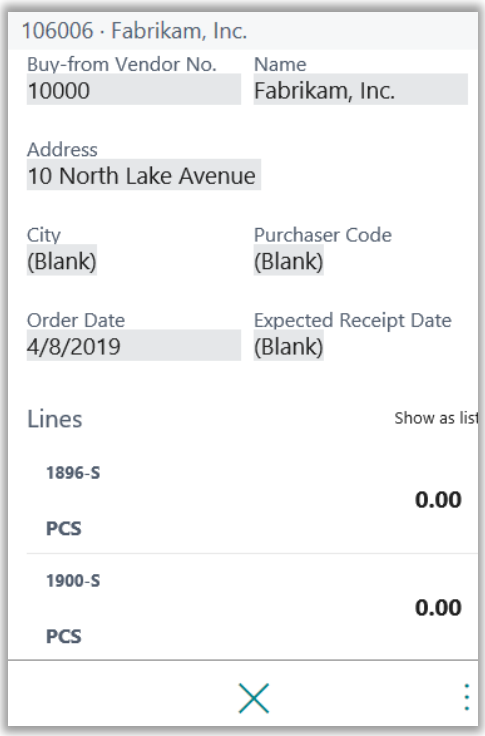
b. Upon scanning your item no., you will enter in the quantity you are receiving against the purchase document.



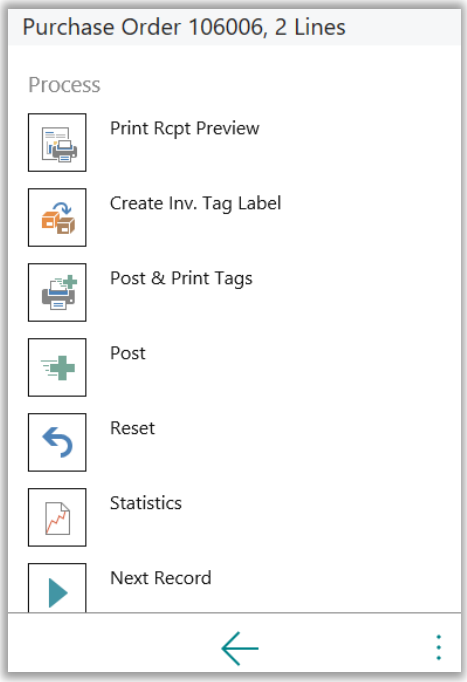
5. If you want to see information regarding the purchase document, you can select “Statistics” from the menu options :



From the statistics screen, you will see header and line information related to the purchase order:

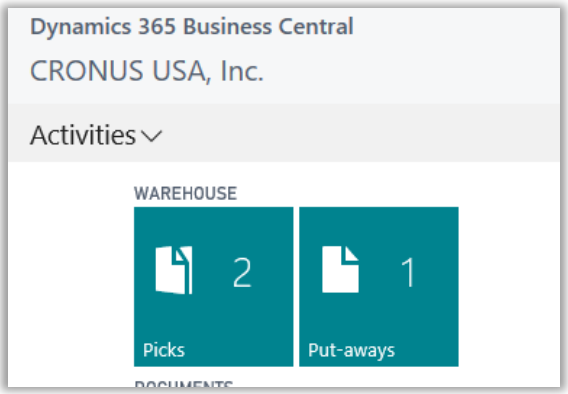


6. Once you have completed scanning the stock against the purchase document, select “Post” from the Menu to post your transaction.

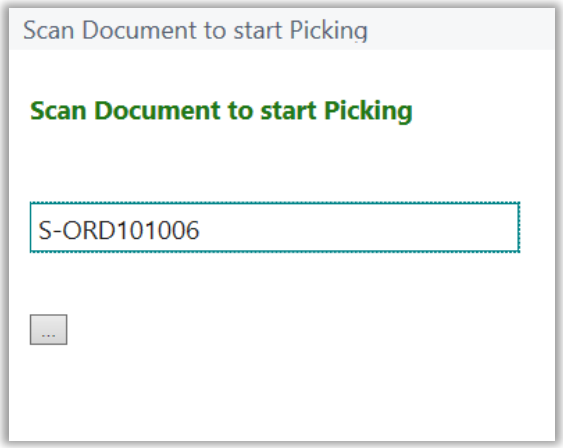


PICKING

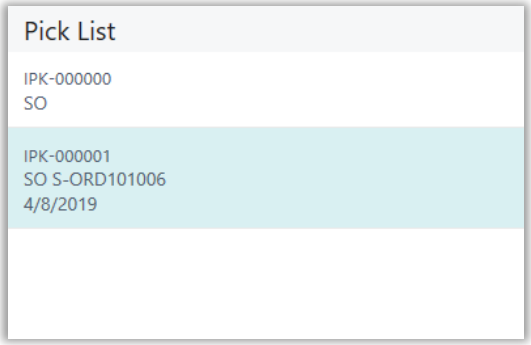
To process a warehouse pick, select a warehouse pick form the pick queues.



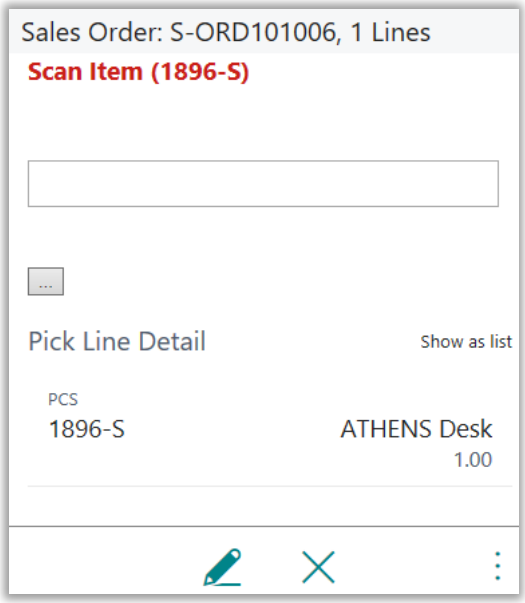
1. Select the pick document you would like to process by scanning/typing the Document Number or the Pick Number.



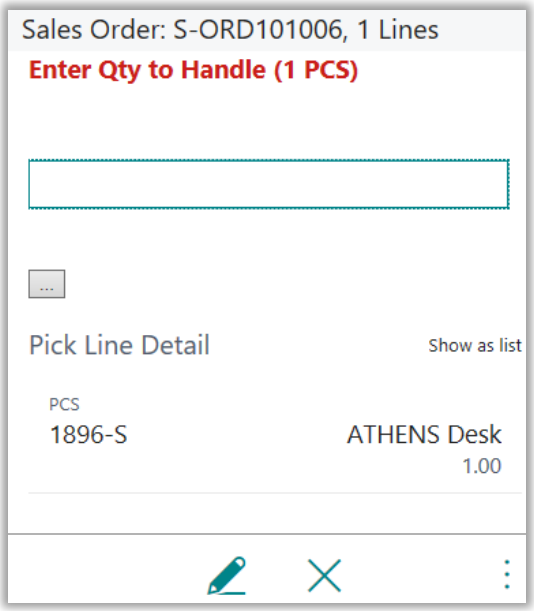
You can search and select for your document from a list by pressing the ellipsis (...)



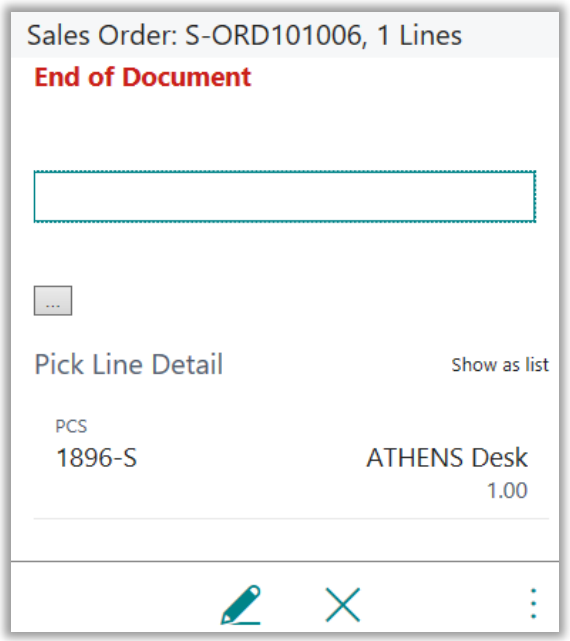
2. The screen tells you what to pick. The item that should be picked first will be prompted for

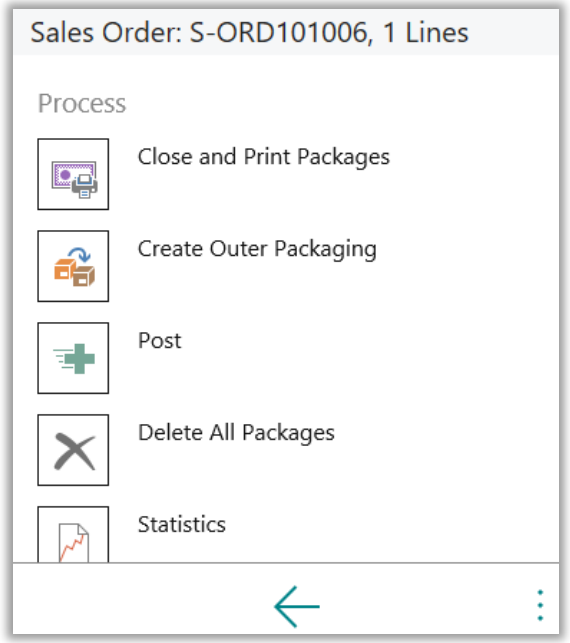


3. Select the quantity that is on the pick line.



4. Keep scanning items that are on the pick. Once you reach the end of the document, select “post”

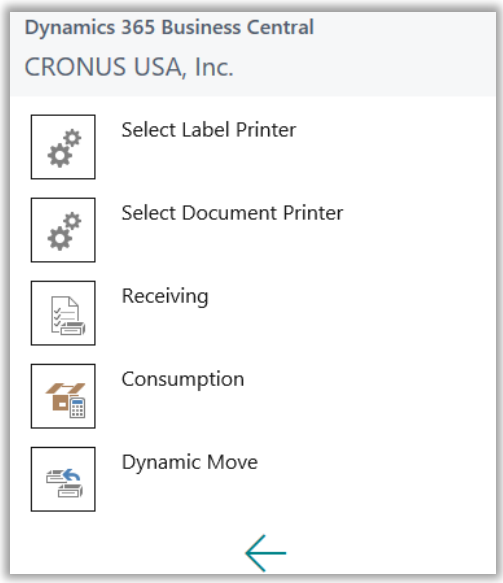




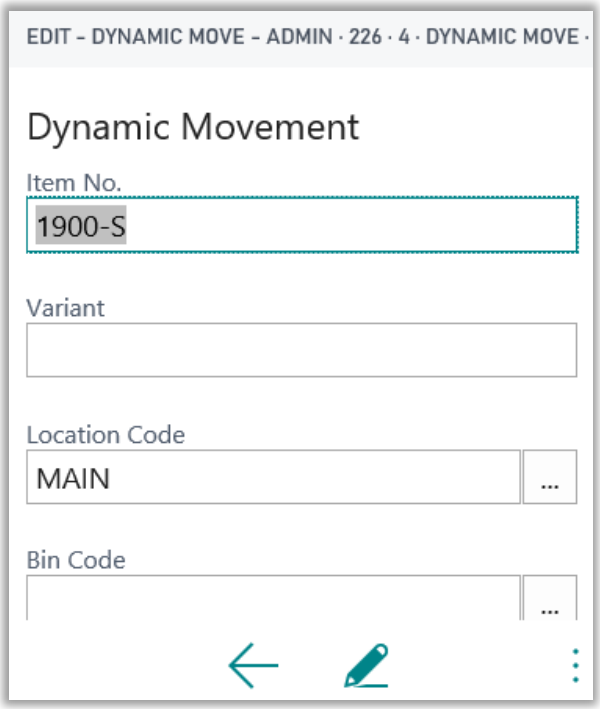
DYNAMIC INVENTORY MOVEMENT & INVENTORY LOOKUPS

To create stock movements within the warehouse, begin by generating a dynamic movement.

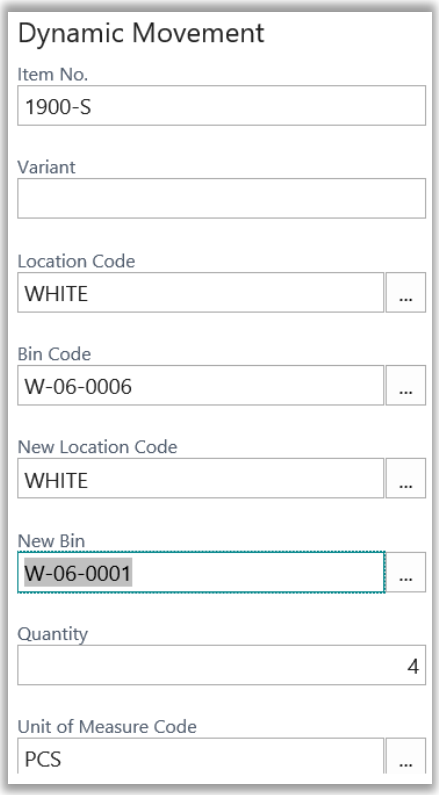
From activities, select “Dynamic Movement”



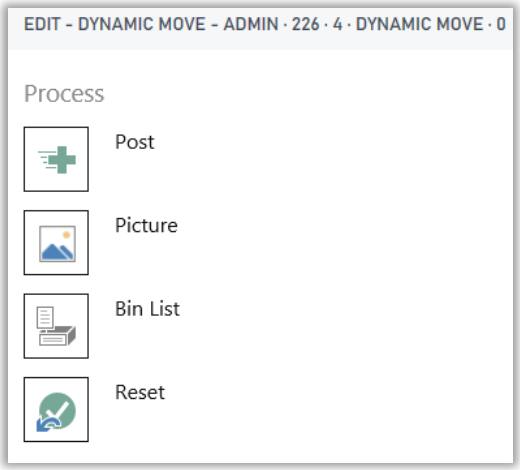
1. Begin the Inventory Movement by filling in the fields in dynamic movement form.



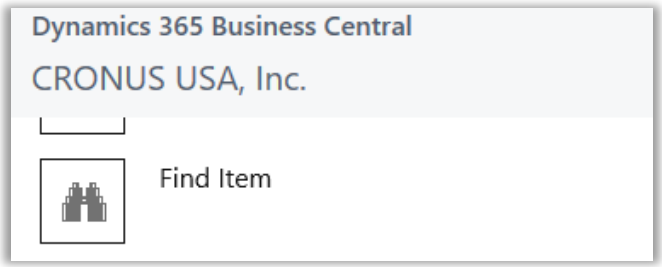
2. Scan the item no. you would like to move.
3. Select bin code (current bin code the stock is in)
4. Select new location code and bin code (destination location & bin)
5. Select the quantity and the unit of measure that is being moved



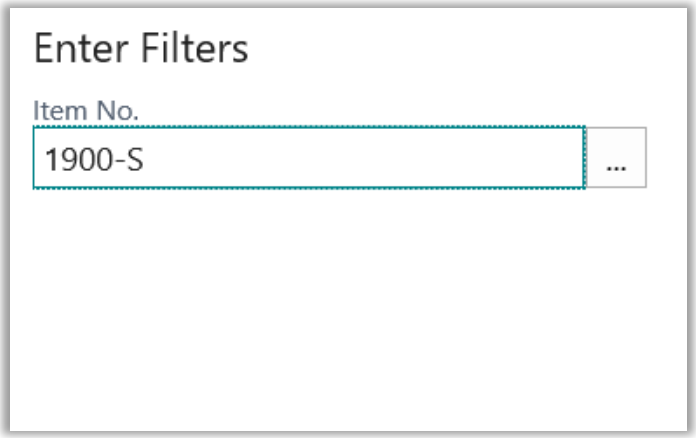
6. Select “Post” under actions to post the inventory movement.

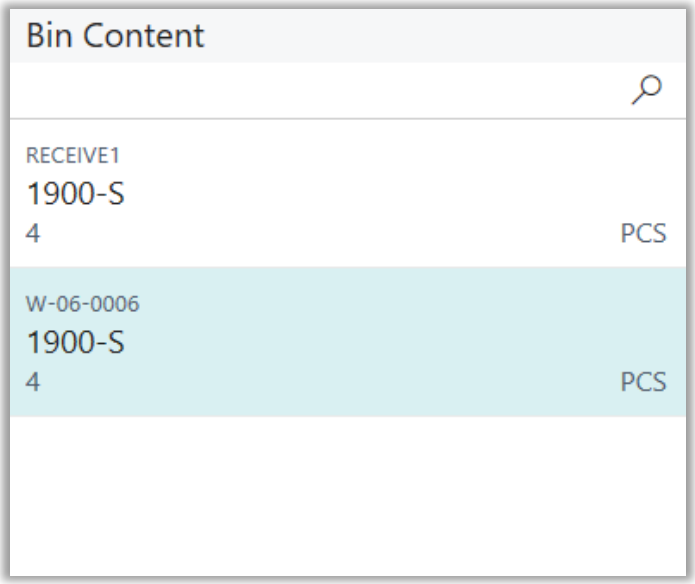


7. To view the inventory movement recently created, back on the main menu actions, navigate to “Find Item”.

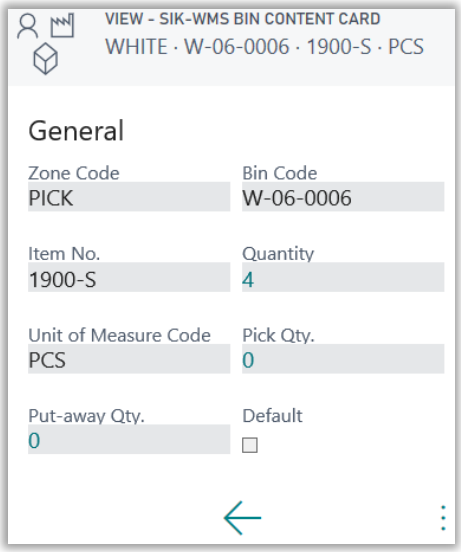


8. After entering in the item number in the filter the bin locations where the item is will be shown.



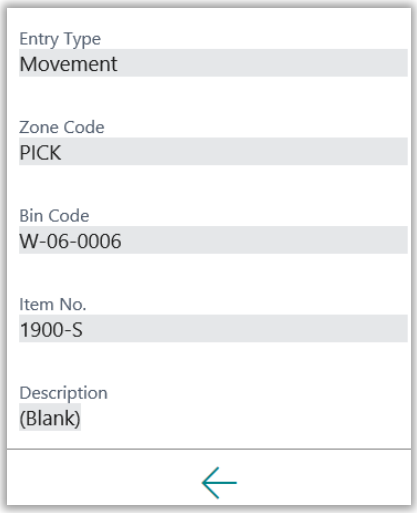


a. Select the bin content record to view detailed information:



b. Drill into the "Quantity" value to view the related warehouse entries tied to the bin content record.

c. Drill into the warehouse entry to see more detailed information:



WMS Picking

OVERVIEW

WMS data collection supports the processing of picks quick and efficient by utilizing a picking management worksheet. The picking management worksheet supports for both single order picks, Batch Picks as well as multi order picks (Bulk Picks). The explanation of the various methods is below:

WMS Picking Types:

Single Order Picks:

Single order picks are 1 to 1 with the sales order. Generating picks as single order will create one warehouse pick for each 1 sales order shipment. This is the standard method of creating warehouse picks.

Batch Picks:

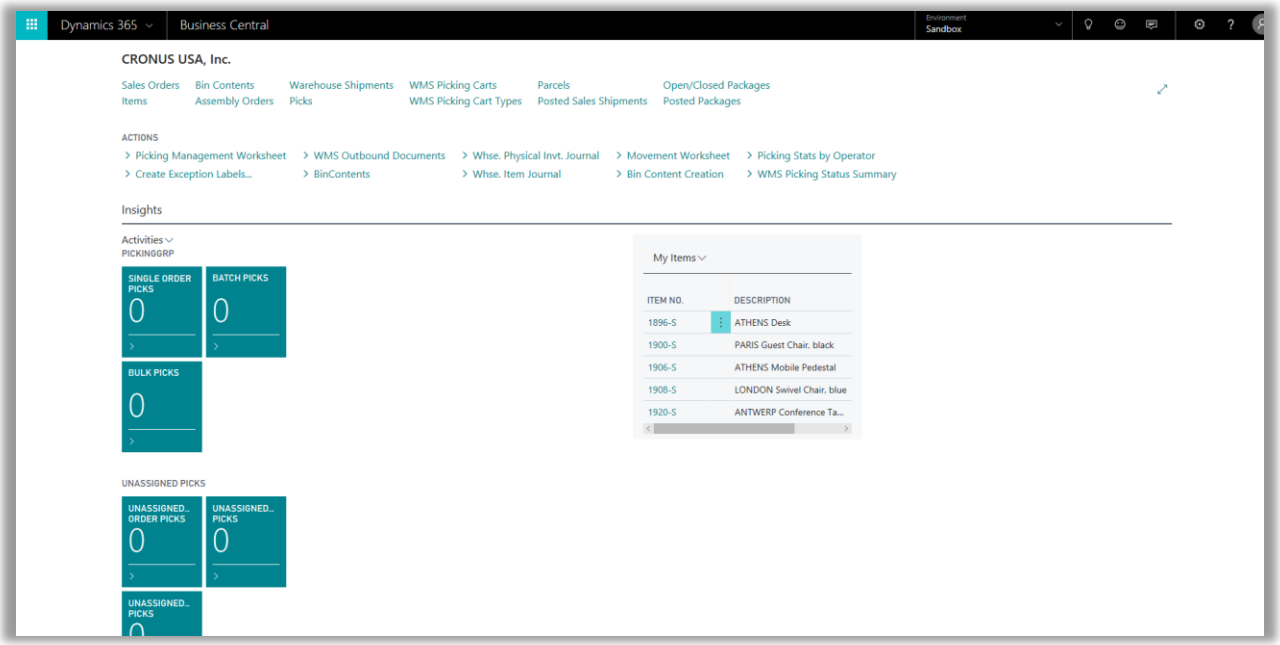
Batch picks are warehouse picks created and assigned to a WMS picking cart for fulfilling of outbound documents shipments in a batch method. When picks are created in the Picking Management Worksheet, they are assigned to a picking cart type, and parcelized into the parcel sizing assigned to the corresponding picking cart type. Based on the number of slots available in the WMS picking cart type, the orders will be parcelized into a single pick, so a single combined pick can be staged onto a cart.

Bulk Picks:

Bulk Picks are warehouse picks created when single item orders are placed, and a warehouse picker needs to pick a single inventory item and place it in multiple order shipments. The need for a bulk pick may arise when a flash sale takes place and an influx of a certain item needs to be fulfilled.

WMS DATA COLLECTION – MANAGER ROLE CENTER

A profile exists for a warehouse manager. Many of the warehouse setups and advanced features can be accessed from their home page.



WMS OUTBOUND DOCUMENTS:

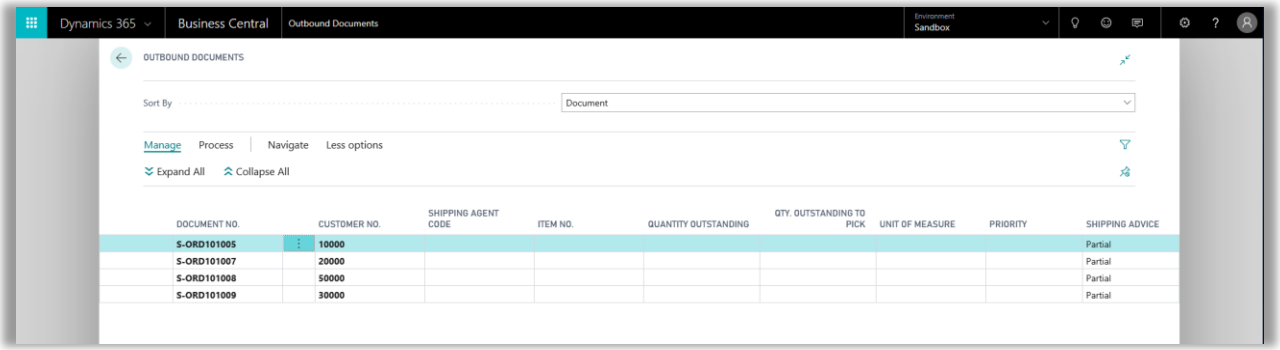
WMS Picking Management utilizes a WMS outbound documents page which feeds into the WMS picking management worksheet. WMS outbound documents can be sales orders ready to be picked, outbound transfer orders and purchase return orders.

The WMS outbound documents page can be seen from two areas:

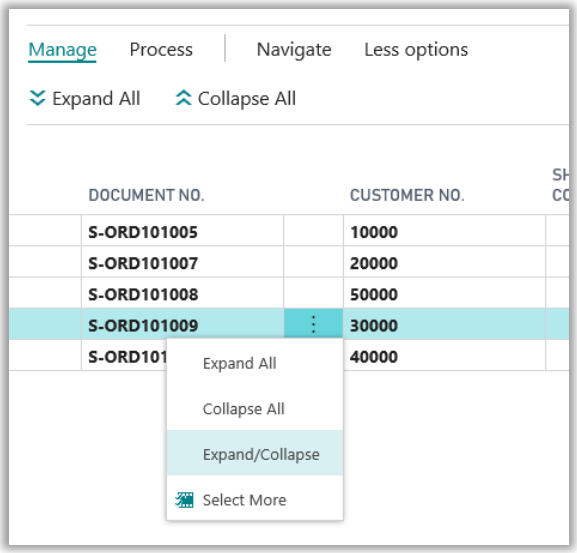
WMS Outbound Documents List

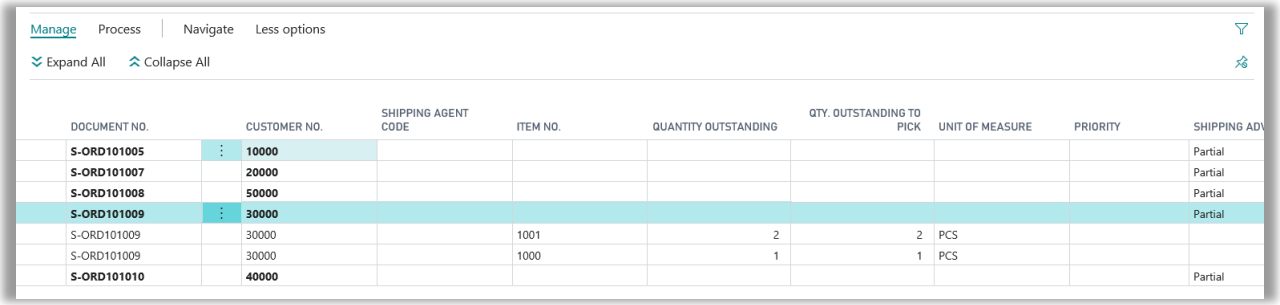
All outbound documents in need of warehouse processing will appear in the WMS Outbound Documents page. Upon opening the page, the field for "Sort by" will be filtered by Document No. This will display a line for each outbound document ready for warehouse processing. These may be Sales Orders, Outbound Transfers, and Purchase Return orders.

Note that when viewing the WMS outbound document page from the menu, sorting methods will be split out by warehouse location.



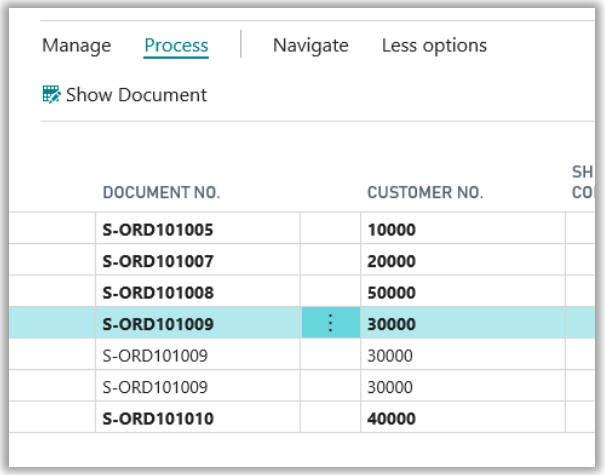
Using the expand/collapse, you can expand the document no's to see the line items behind the particular outbound documents:

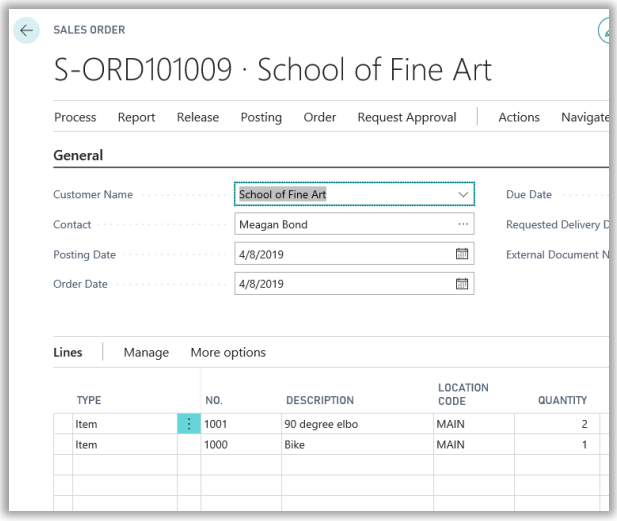




The expand all / collapse all provides the ability to expand all documents current filtered on in the list.

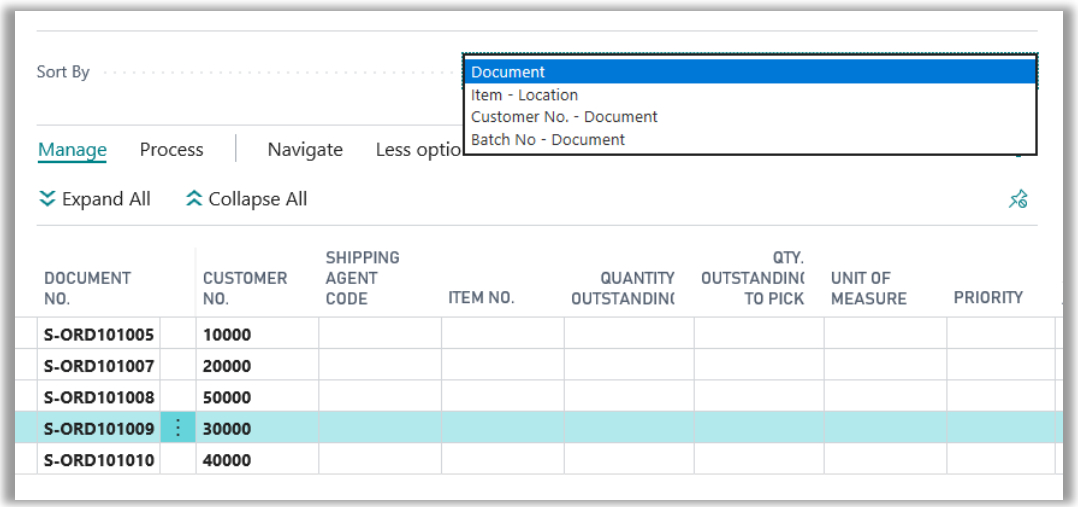
From any line on the WMS outbound document page, select “Show Document” to show the corresponding transaction.





Sorting the WMS Outbound Documents Page

The ability is available to sort by the following methods in the WMS outbound document page:



- Document
  - Document, expands to document lines (shown in section

- Item – Location
  - Expands to sales lines with corresponding item

- Customer – Document
  - Expands to Document tied to customer, expands further to sales lines

- Batch No. – Document
  - Custom grouping of sales orders by order batch no., expands to sales orders, further to sales lines

PICKING MANAGEMENT WORKSHEET

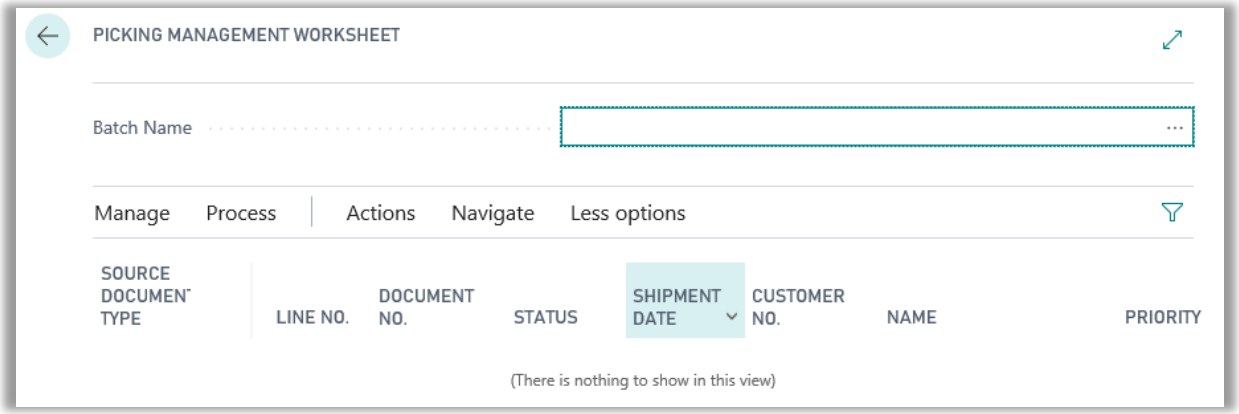
The picking management worksheet is a tool which interacts with the WMS outbound documents screen allowing's warehouse employees to grab multiple outbound documents at a time and generate warehouse picks based upon what is brought into the picking management worksheet.

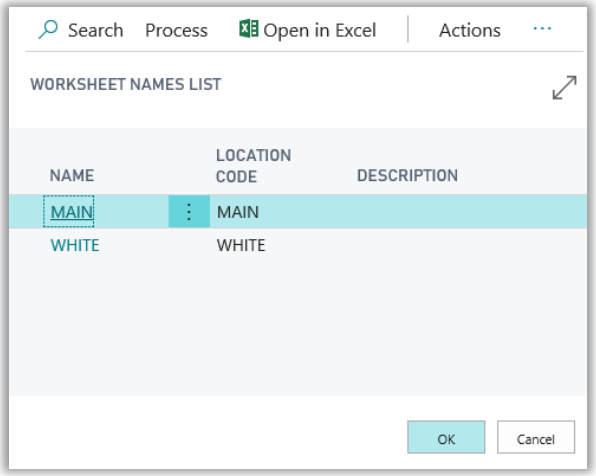
The picking management worksheet is tailored to be singular to the warehouse an employee operates in, therefore outbound documents from one location will not be seen by a worksheet from a different location.

Using the Worksheet

Worksheet Batches

WMS Picking worksheets will use warehouse worksheet batches. Each warehouse worksheet batch will be directly linked to a location code. This location code is the location code that will be used in filtering WMS outbound documents.

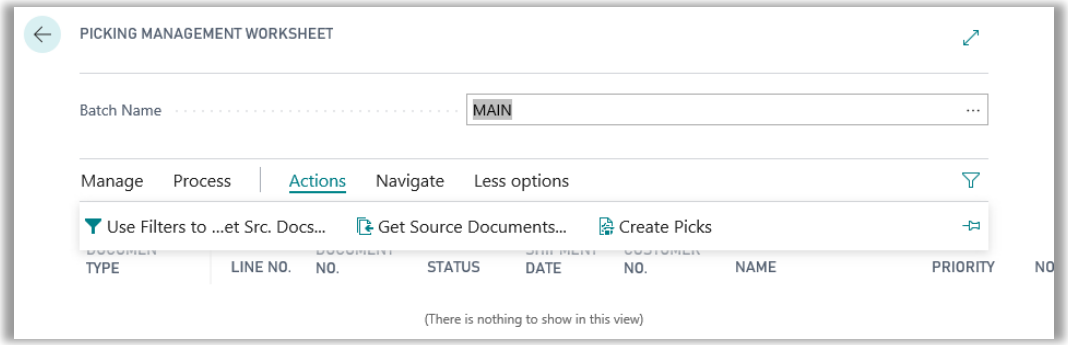




Creating Picks

Selecting Documents for Picking

The first step in creating picks using the picking management worksheet will be to pull outbound documents into the picking management worksheet. To do so, select the “Get Source Documents” action on the ribbon.

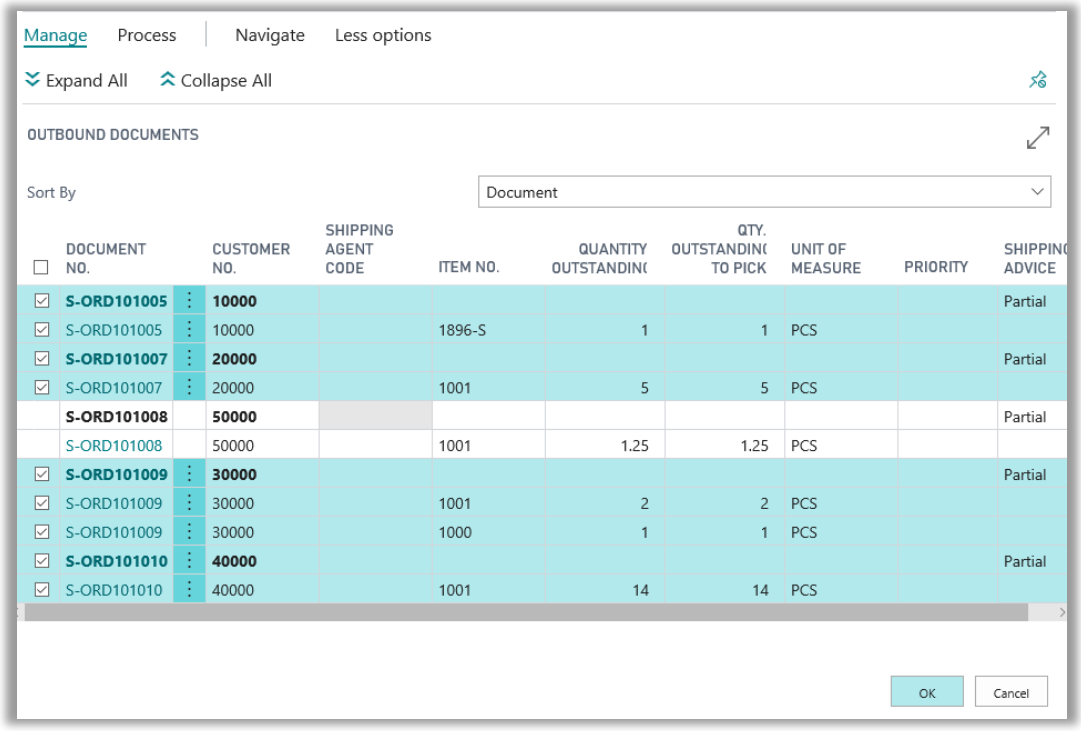


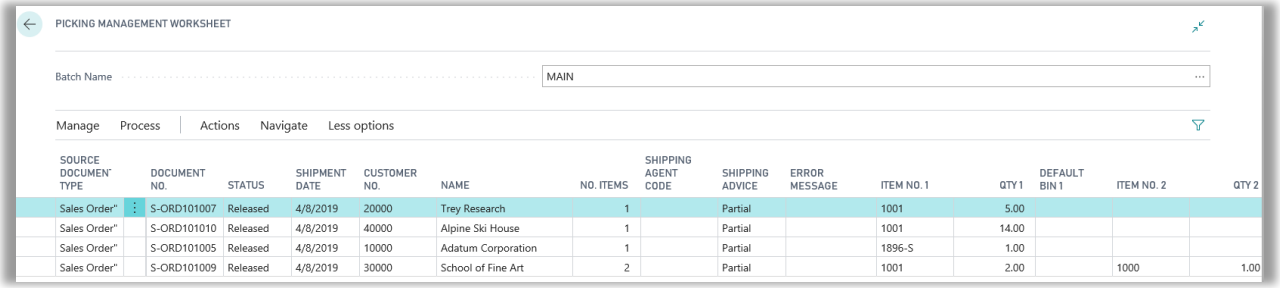
This will show the WMS Outbound Document Page. Select one or multiple by highlighting one ore more rows.

When choosing documents to bring into the picking management worksheet, you will be able to select a combination of documents. If the line you are selecting is a grouping of documents, all related document will be pulled into the picking management worksheet.

For example, if you select “Customer”, all related sales orders for that customer will be pulled into the picking management worksheet.

Once you have your desired documents selected, click “OK” to bring the documents into the worksheet.





SOURCE DOCUMENT TYPE	DOCUMENT NO.	STATUS	SHIPMENT DATE	CUSTOMER NO.	NAME	NO. ITEMS	SHIPPING AGENT CODE	SHIPPING ADVICE	ERROR MESSAGE	ITEM NO. 1	QTY 1	DEFAULT BIN 1	ITEM NO. 2	QTY 2
Sales Order	S-ORD101007	Released	4/8/2019	20000	Trey Research	1		Partial		1001	5.00			
Sales Order	S-ORD101010	Released	4/8/2019	40000	Alpine Ski House	1		Partial		1001	14.00			
Sales Order	S-ORD101005	Released	4/8/2019	10000	Adatum Corporation	1		Partial		1896-S	1.00			
Sales Order	S-ORD101009	Released	4/8/2019	30000	School of Fine Art	2		Partial		1001	2.00		1000	1.00

- number of columns are present in the picking management worksheet which represent fields from the individual transactions.

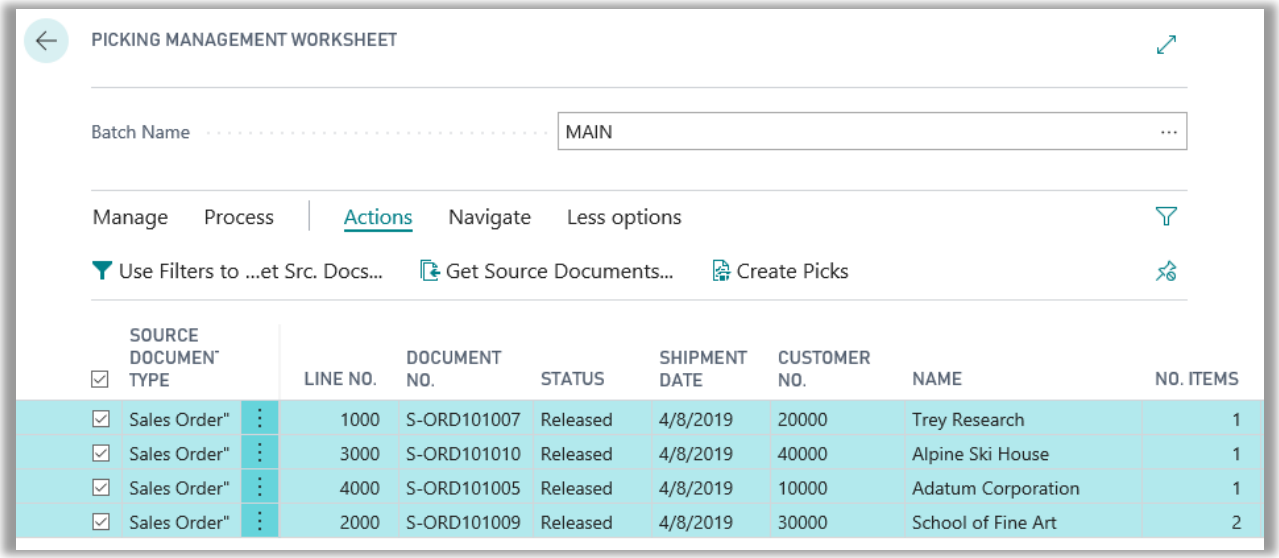
- A field is present for “No. of items” This represents the unique items on the sales orders. When loading the picking management worksheet, the sales orders will be sorted in the order specified under the WMS data collection setup menu. For more information, see section WMS Data Collection Setup under **Picking Management Worksheet**

- Line items on outbound transactions are displayed as a column view on the Picking Management Worksheet, this allows for all line items to be displayed with the sales order in a single record. The item no., quantity and variant (if used) will be present as columns. There are 10 available columns for the line items on an order.

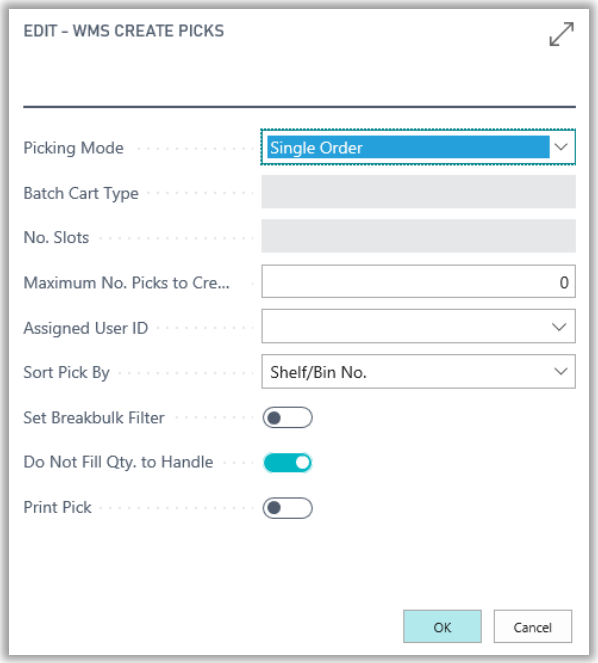
Creating Warehouse Picks

Once orders have been reviewed in the picking management worksheet, it is time to create the warehouse picks.

1. Select the picks on the worksheet you wish to pick by highlighting rows or selecting all picks (Can be done by “selecting more” and checking the top box). Then, click the action “Create Picks”



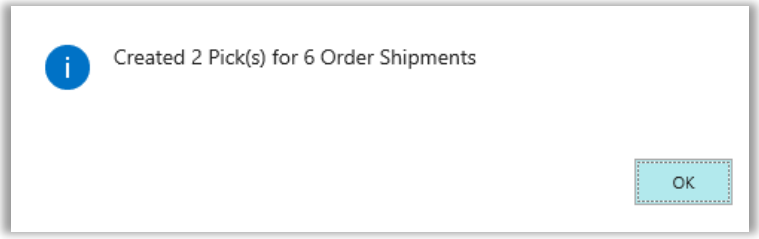
2. On the request page, complete the prompts:



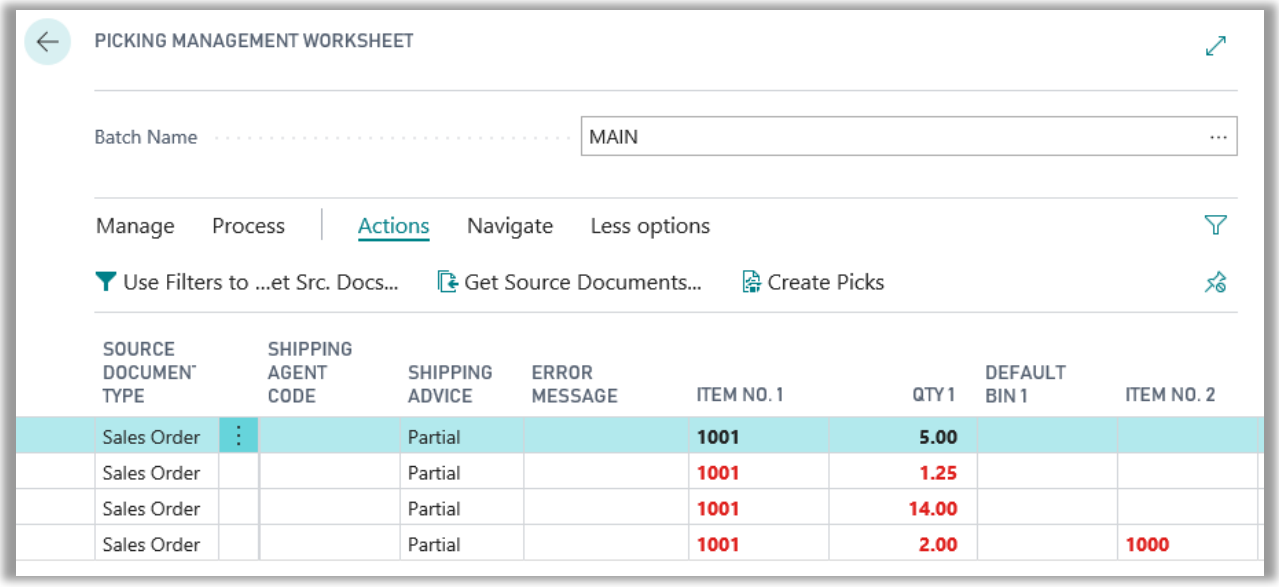
- Picking Mode: SINGLE, BATCH, BULK.
  - Single Order: Creates one pick per sales order
  - Bulk: This will create one pick for multiple order. This functionality will only work for order with one line, which have the same item.
  - Batch: Will allow collecting picking for multiple documents at the same time using carts.
- Assigned User ID: this will allow users to assign picks to other users
- Sort Pick By: This controls the sorting of the picks on the warehouse activity header
- Set Breakbulk Filter: Sets the breakbulk filter on the group of picks being selected
- Do Not Fill Qty. to Handle: Will leave the qty. to handle at zero when picks are created
- Print Picks: Selecting this will print the pick tickets for the picks that are created.

Managing Backorders

Upon creating warehouse picks, they will be removed from the picking management worksheet if they are created successfully.



If picks are not created due to a backorder, they will appear red in the picking management worksheet, allowing further review of the inventory statuses prior to moving on to new outbound documents:



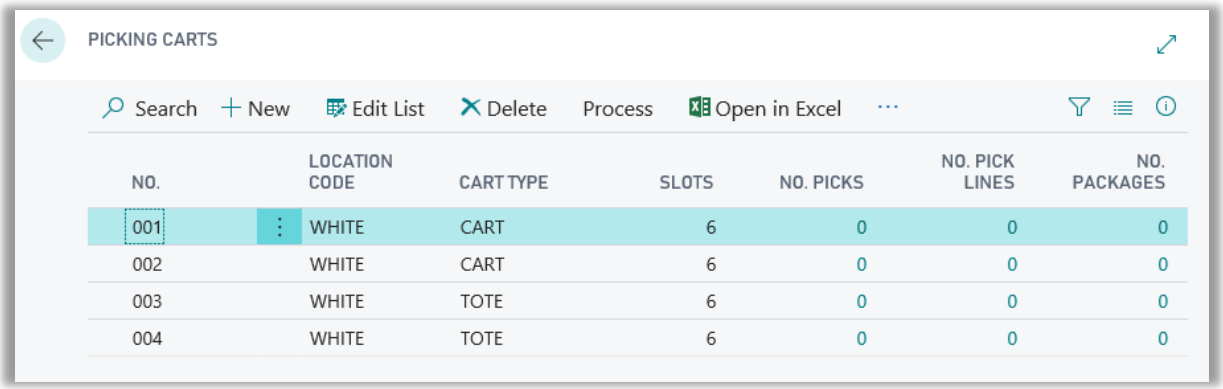
SOURCE DOCUMEN TYPE	SHIPPING AGENT CODE	SHIPPING ADVICE	ERROR MESSAGE	ITEM NO. 1	QTY 1	DEFAULT BIN 1	ITEM NO. 2
Sales Order		Partial		1001	5.00		
Sales Order		Partial		1001	1.25		
Sales Order		Partial		1001	14.00		
Sales Order		Partial		1001	2.00		1000

BATCH PICKING USING WMS DATA COLLECTION

BATCH PICKING ADMINISTRATION

Picking Carts

Picking carts are represented by individual records in WMS Data Collection. Picking Carts are unique to the location.



NO.	LOCATION CODE	CART TYPE	SLOTS	NO. PICKS	NO. PICK LINES	NO. PACKAGES
001	WHITE	CART	6	0	0	0
002	WHITE	CART	6	0	0	0
003	WHITE	TOTE	6	0	0	0
004	WHITE	TOTE	6	0	0	0

No. : This is the unique identifier of the cart record

Location Code: This is the location code that the picking cart belongs to

Cart Type: The type of cart that is setup for this cart. This is

Slots: Number of levels of the Cart. This is the max number of packages to be selected on the cart.

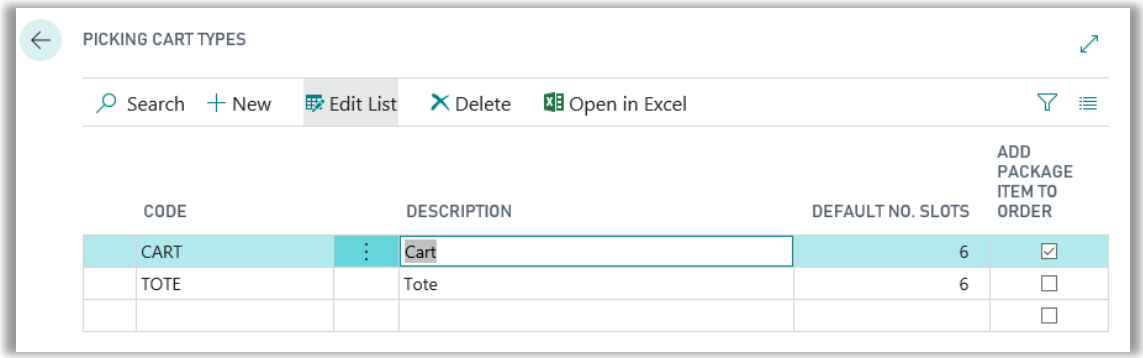
No. Picks: This is a lookup of all the picks currently on the cart

No. Pick Lines: This is the no. of pick lines that are currently on the cart

No. of Packages: This is the number of packages currently on the WMS picking cart.

Picking Cart Types

Each picking cart is assigned a picking cart type. Picking Cart types are defined to assign specific parcels to a group of carts. The carts are assigned WMS Picking Cart Parcels, which contain box sizes which will be used during the pick creation process to assign order contents to a specific box type.



Picking cart types are defined to hold settings as they relate to the picking process for those carts.

Code: Unique identifier for the picking cart

Description: Description of the individual picking cart

Default No. Slots: How many slots to hold packages exist on the cart by default. Can be changed on each cart.

Add Packaging Item to Sales Order: This check box will control of the item added through parcelization is added at the time of parcelization or pack out of the item

Picking cart types are defined to hold settings as they relate to the picking process for those carts.

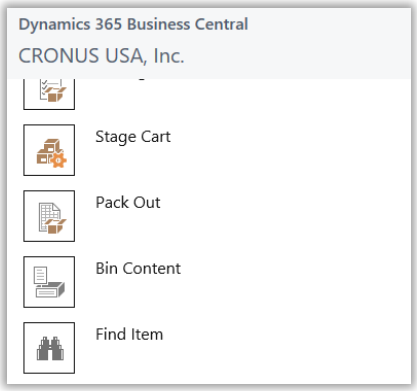
STAGING CARTS

to assign a warehouse pick to a cart, the process of Staging Carts is followed:

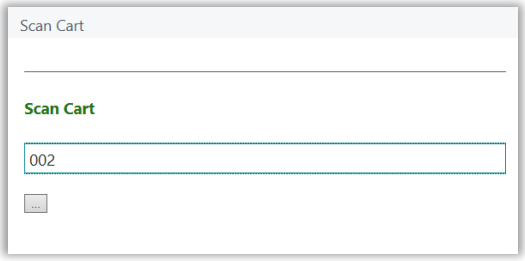
Inducting Picks to Cart

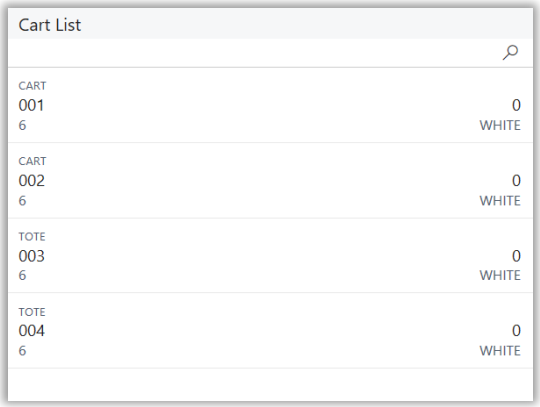
To induct picks to a cart, select “Stage Cart” on the activity menu (can be done via. Web client or RTC).

1. Select “Stage Cart”

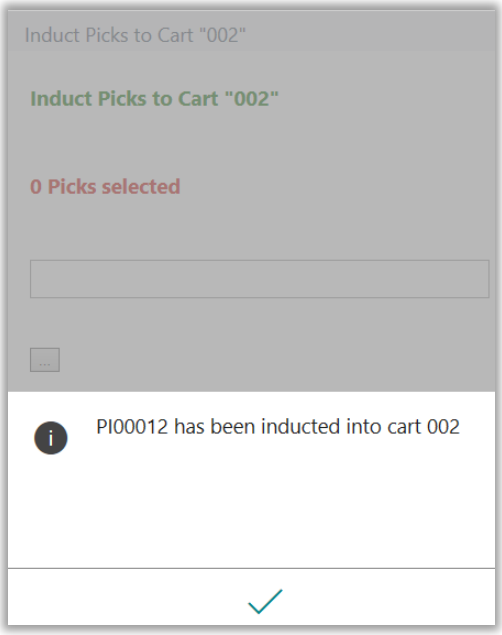


2. Select the picking cart by scanning OR selecting the ellipsis to lookup.

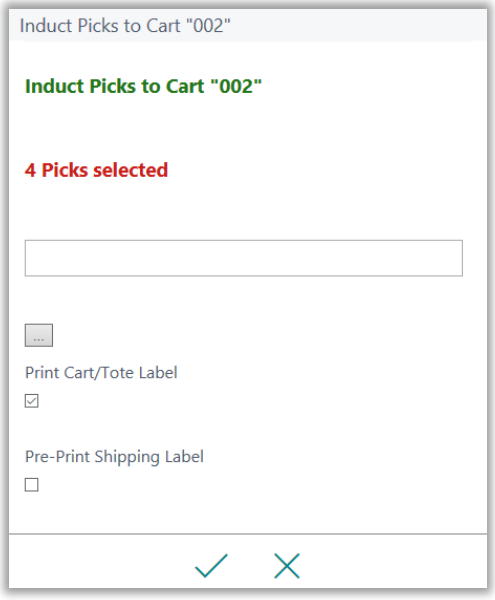




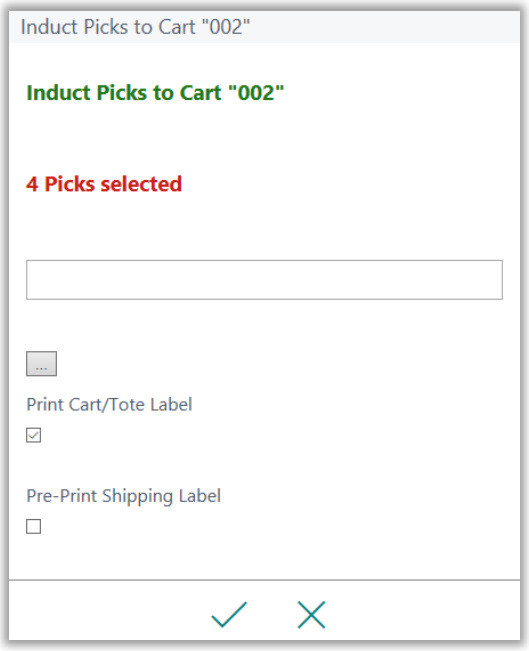
3. Upon selecting picks to a cart, the only picks visible to be selected are the picks tied to the WMS Cart Type of the corresponding picking cart. This limits the lookup and will display the picks in the order they were created, which should be fulfilled by the cart type. Clicking the ellipsis will show documents that are available to select. After a document is scanned or selected from the list, it is added to the cart.



If you wish to print a box label at the time of staging, select “Print Cart/Tote label” on the prompt. To pre-print shipping labels, select “Pre-Print Shipping Label’



Once you induct a pick to a cart, the page will display the number of picks selected:

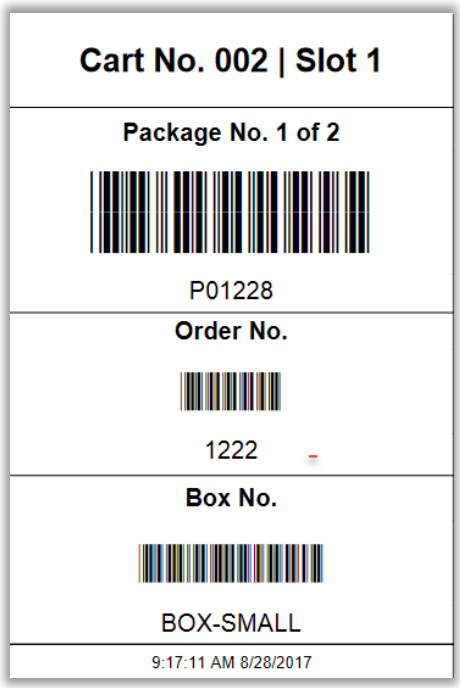


Once you have selected all picks on the cart you wish to pick in one batch, the staging process is complete. The next step will be to begin the picking process.

WMS Box Labels

A box label will print displaying the following information, which should travel with the box on throughout the warehouse:

- Cart No.
- Sales Order No. (Source ID)
- Parcel ID (Box Item)
- Package ID
- Slot No. on Cart
- Date and Time Printed



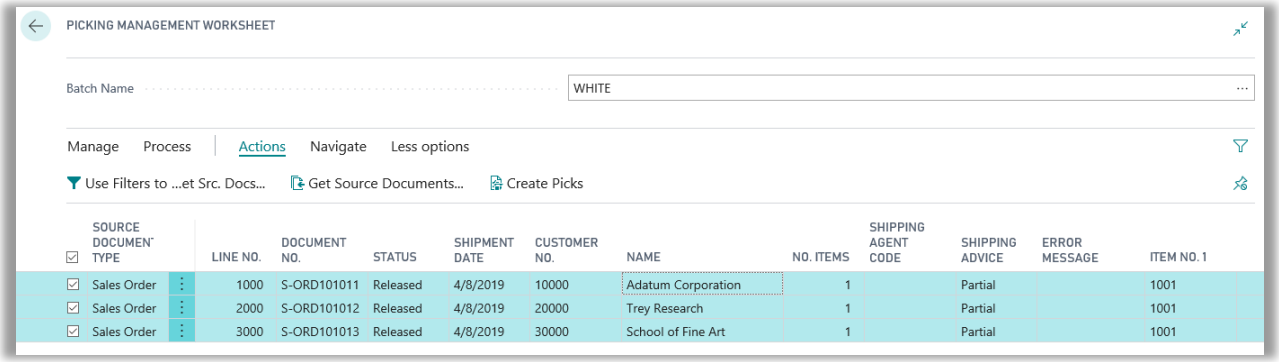
When staging carts, the box label will print for each individual package on the picking cart.

BATCH PICK PROCESS

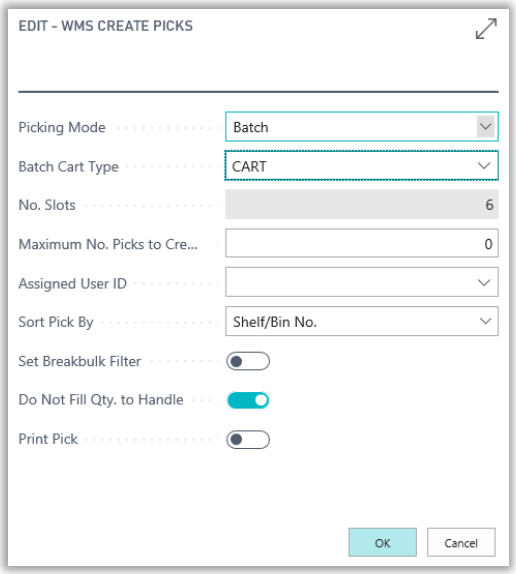
Pick Processing

1. Select the picking mode that is being used by the operator
2. Begin scanning the corresponding prompts on the screen.
3. Scanning in the batch picking process will prompt for the standard prompts for bin, qty. lot, and serial no. and item no.
4. Scanning using batch picking will prompt for the placement of item quantities into a box on the respective picking cart:

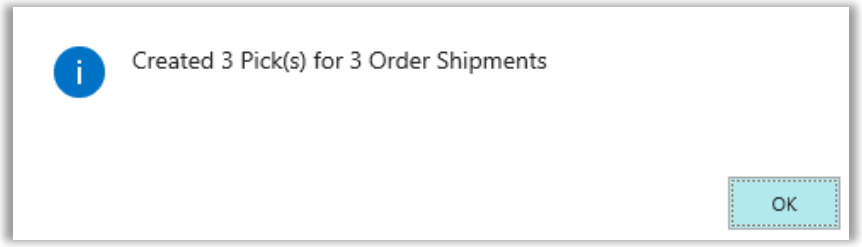
1. Step one in the batch pick process is to create the warehouse picks for the group of orders that will be batched together:
    a. This example contains 3 sales orders, with the same item no. (item no. 1001)



2. Next create the warehouse picks. Select all document rows and click the “Create Picks” action. Select Batch in the picking mode:

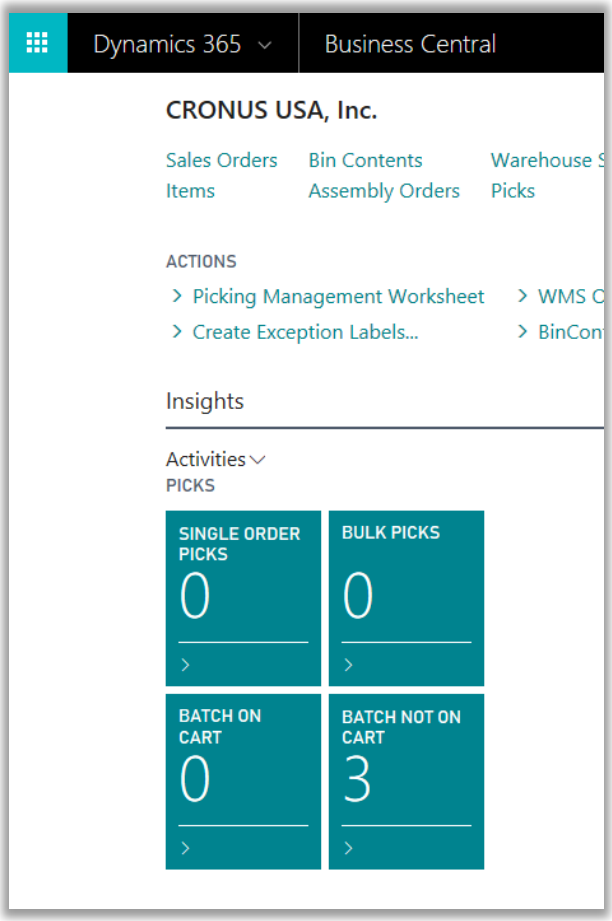


a. If inventory exists for the item, 3 of 3 picks will be created

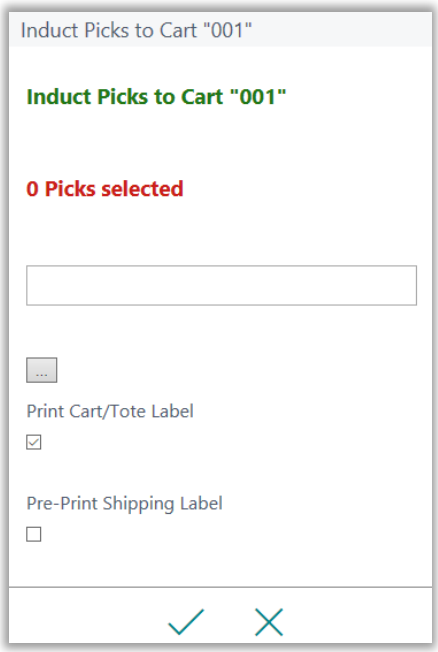


b. Notice how after the picks are generated, the picks will fall off the WMS Picking Management worksheet.

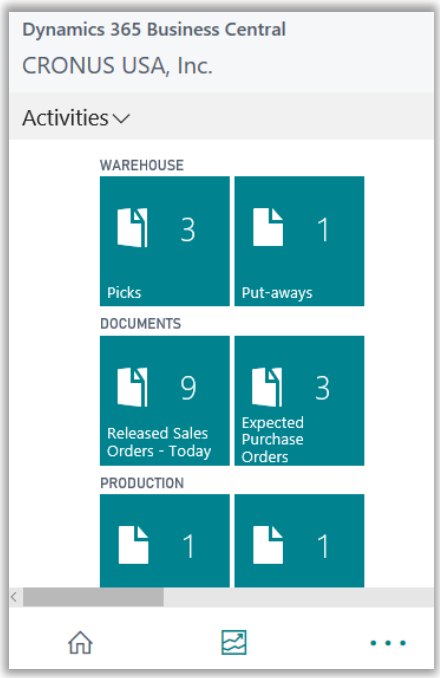
3. The WMS Data Collection – Manager role center will show 3 batch picks not yet put on a cart



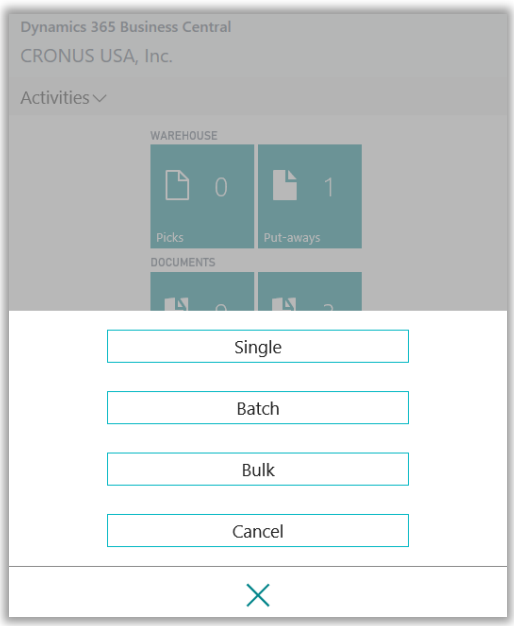
4. The next step is to begin staging the cart.
    a. On the WMS Operator role, Navigate to “Stage Cart” and stage a cart with the 3 picks generated:
    b. Continue until all 3 picks are in the cart. For more information on staging carts, see section “Staging Carts”



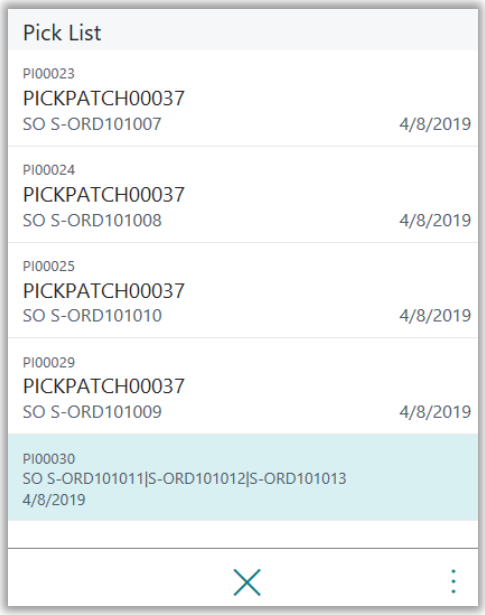
5. To begin the picking process for batch picks, select “Picks” on the role center, or “Picking” under the activities menu.



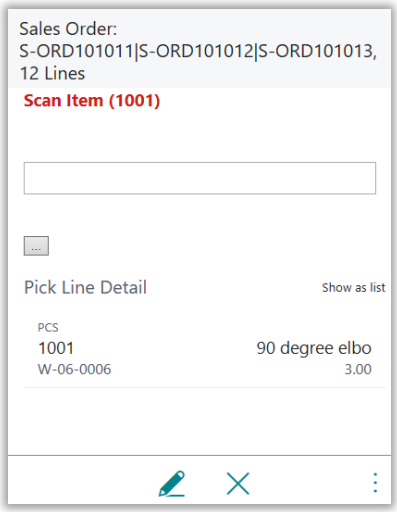
6. Select “Batch” as the picking mode:



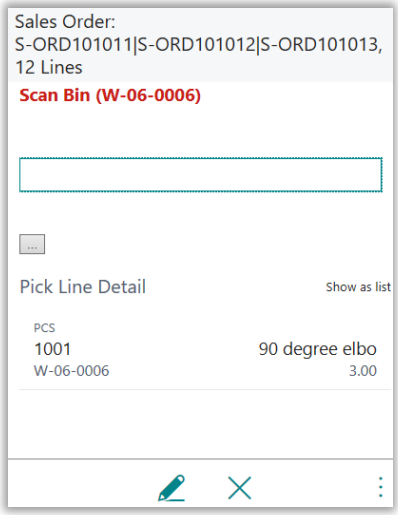
7. Begin the picking process by scanning one of the documents on the batch or hitting the ellipse to lookup. If looking up, you will see a list of the orders that have now been put onto a single pick action.



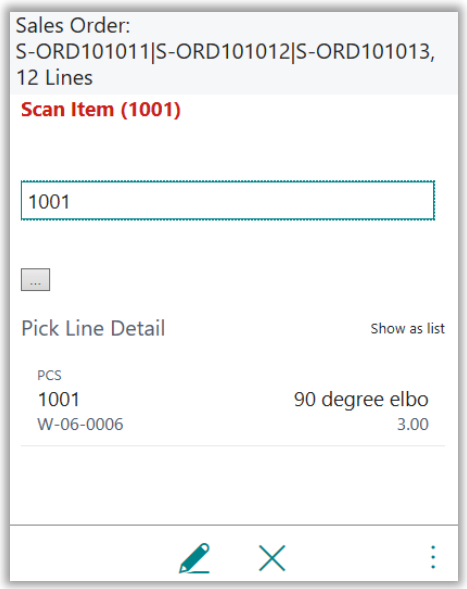
8. Select the order to process. Notice how the sales orders are listed on the top of the page. Follow the prompts to process the pick (Note: the order the prompts will appear is controlled by an administrator setup in WMS Data Collection Setup)



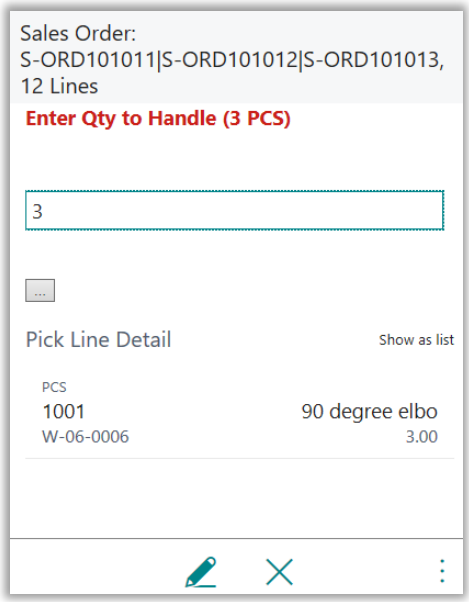
a. Scan Bin:



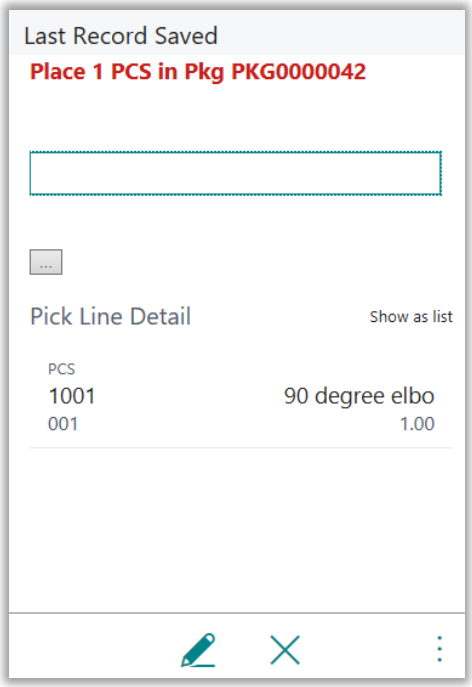
b. Scan Item:



c. Scan Qty to Handle. Note: in a batch mode, you will first be prompted to “Handle” the quantity for all orders that are in the batch. In this example, all three orders have a quantity of 1 for the item. The next step is to split for each order in the batch.

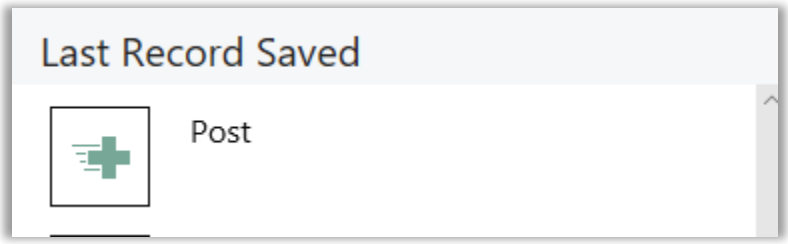


d. Follow the prompts on the screen to place the items picked in the cart
    i. Be aware of the qty that needs to be placed in each individual box



9. Once you are finished placing items from that take line into the boxes, the pick will continue. If the pick you are handling only has one item, all of which were in the same bin, the picking process will now be complete.

10. Register the pick by selecting the ellipsis and selecting “Post”

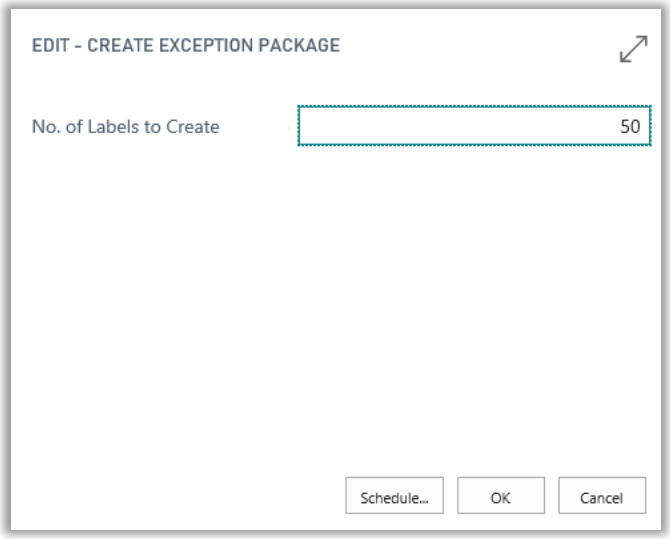


EXCEPTION HANDLING

To account for scenarios in the picking process which do not conform with the configuration, an exception handling process is in place. This process involves placing items picked into an exception package which will be scanned from pre-created package labels.

Creating Exception Labels:

1. From the role center of the WMS Production Manager, select “Create Exception Labels” on the ribbon:

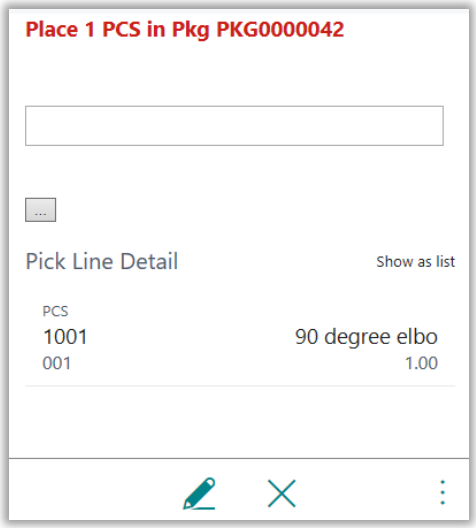


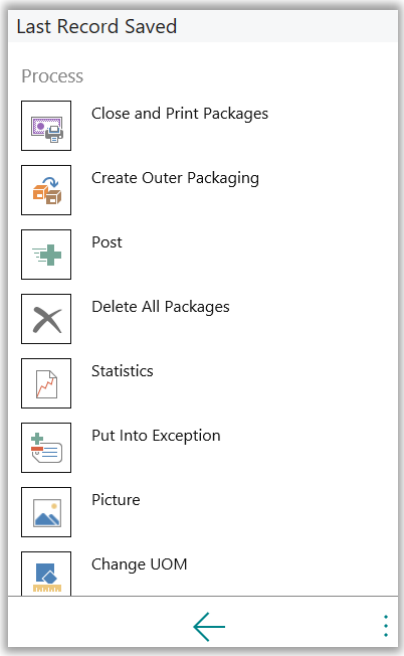
2. After the creation of each WMS Exception Label, an exception label will print:

Processing Exception Packages

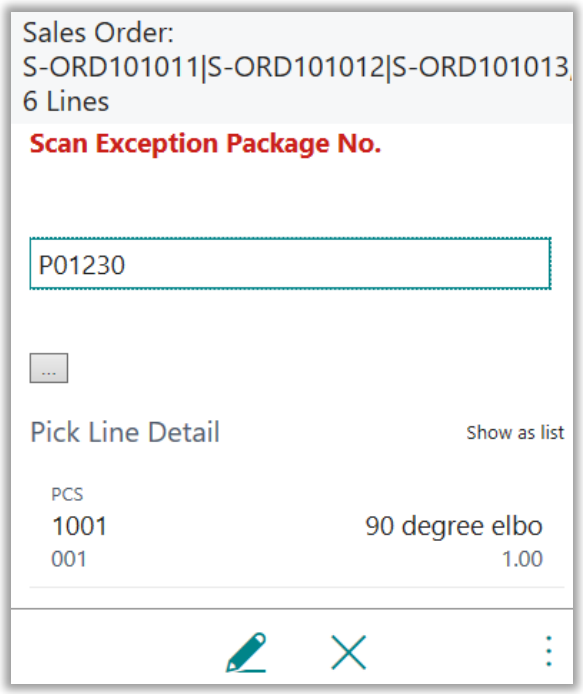
When picking, if an item does not conform to the package that it is intended to be processed into, the operator will choose to place it in an exception package.

1. When on the “Place in cart” prompt, the user will select the Place in exception action from the ellipsis.





Once the exception action is chosen, a prompt will appear to scan the exception package no.

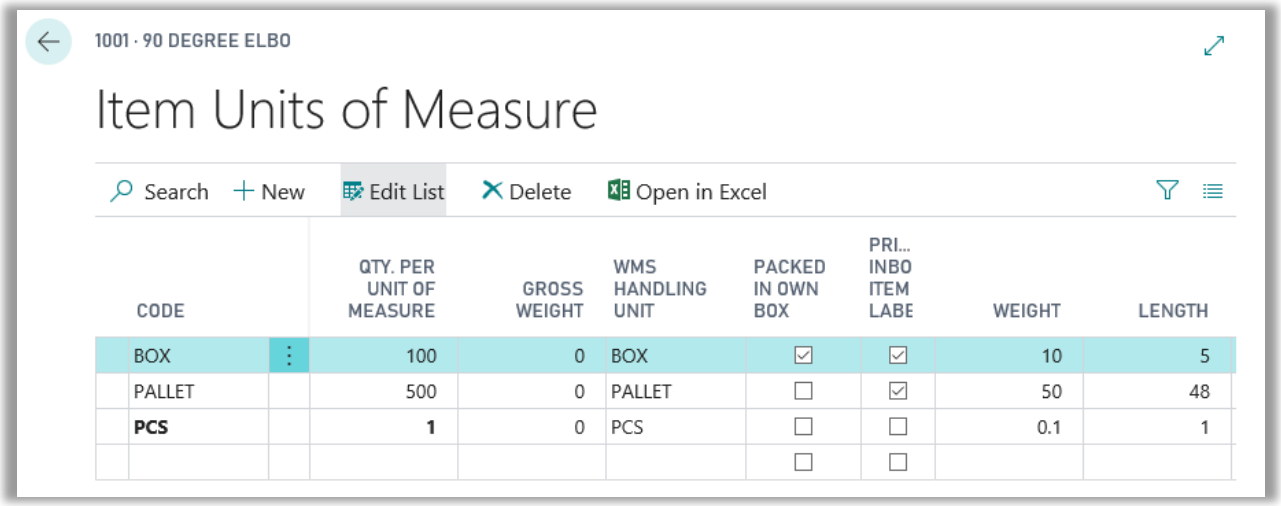


SELF SHIPPING CONTAINERS

When processing items from the picking location to the shipping areas, the situation of items being shipped in their own container may arise. This may be because of special packaging, or because of product being sold in an equal set and the items will be shipped in the equal set without breaking the box.

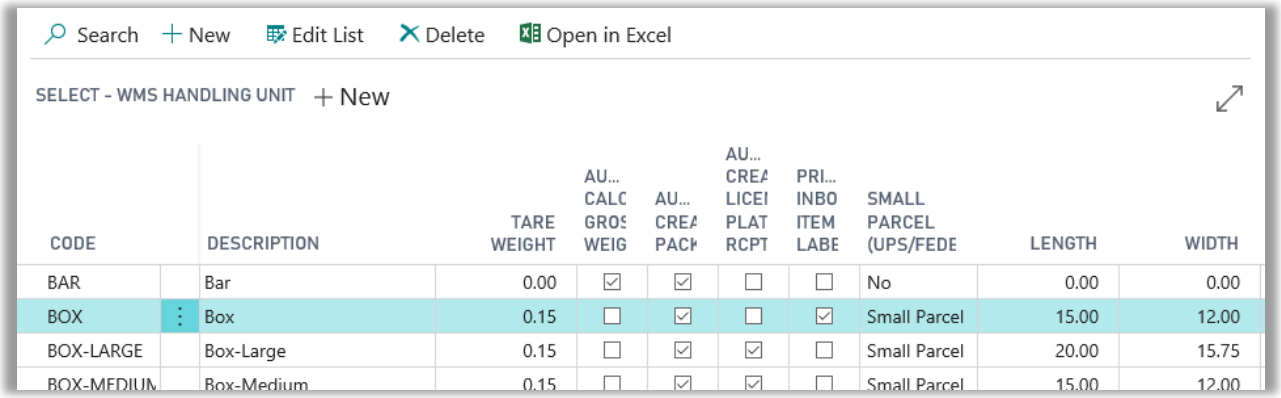
SETUP

To declare an item Unit of Measure as being packed in its own shipping box by checking the “Packed In Own Box” field.



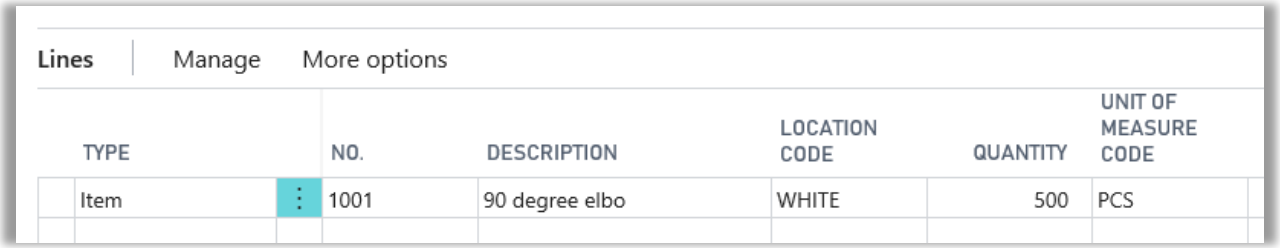
In the example above, if a sales order quantity is sold in the base unit of measure and the warehouse pick is calling for 200 PCS, the product will be staged for shipping in 2 separate packages of “Box” due to the product being marked as “Packed in Own Box”.

For the product to be packed in an equal set, a corresponding WMS Handling Unit record will need to be setup as a “Small Parcel”.



Processing Self Shipping Containers

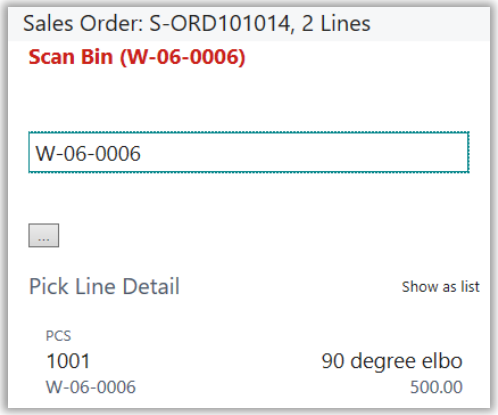
The following sales order is calling for 500 PCS of Item 1001. As show in the section above, item 1001 does have an Item UOM that is “Packed in Own Box” of 100.



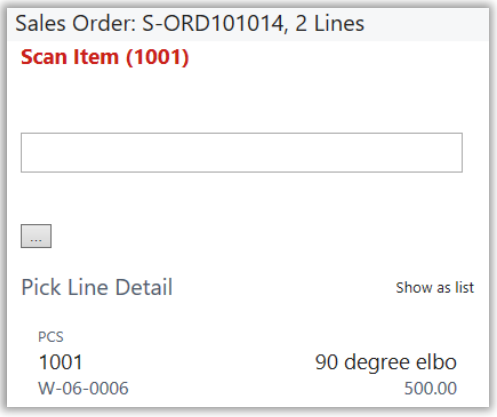
Create the warehouse pick and stage the product to a cart.

When processing the picks, the pick prompts will instruct the operator to take the items as usual:

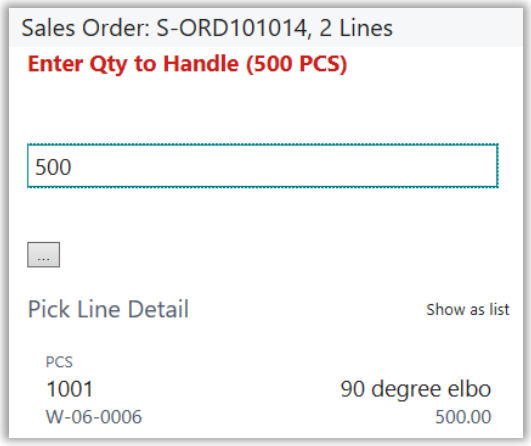
Scan Bin:



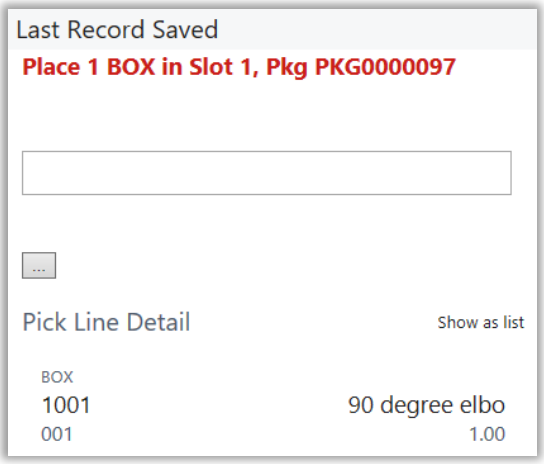
Scan Item:



Scan Qty:



When the place prompts appear, the operator will be instructed to place 1 BOX into the corresponding slot. Since the pick was for 500 pieces, there will be prompts to put 5 boxes into slots.

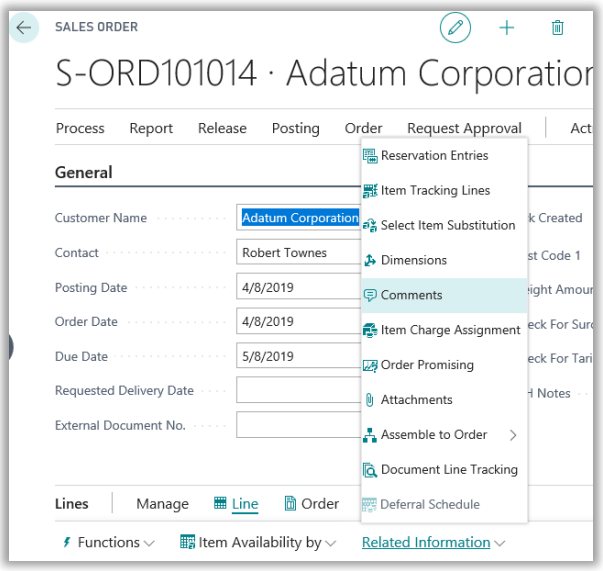


PICKING COMMENTS

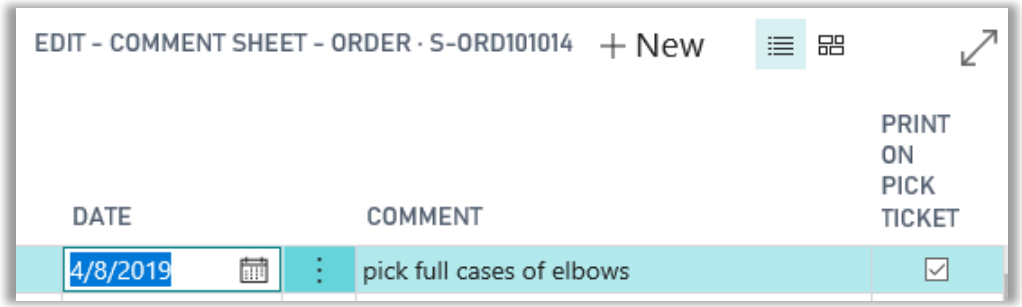
Order header and Order line comments can be displayed at the time of picking to provide visibility to WMS Operators to notes and alerts on the order line.

For comments to show, the “Print on Pick Ticket” box will need to be checked on the Sales Order Line Comments Page:

1. Navigate to a sales order, with the sales line selected, select line, related information, Comments:

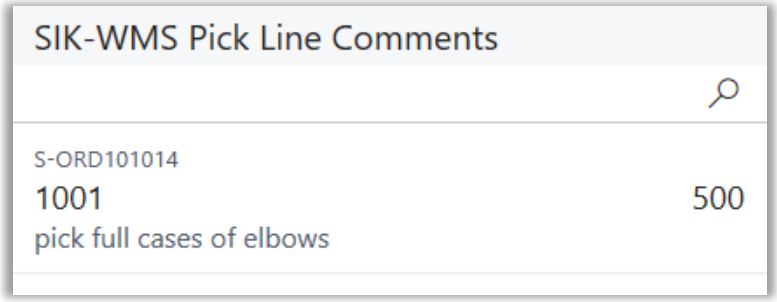


2. On the comment sheet, enter in the comment and select “Print on Pick Ticket”



3. Begin picking the sales order on the handheld by selecting “Picking” and enter in either the Pick No. or the Source ID (Sales Order)

4. Upon the beginning of the pick line containing a comment, a message will appear with the pick line comment:

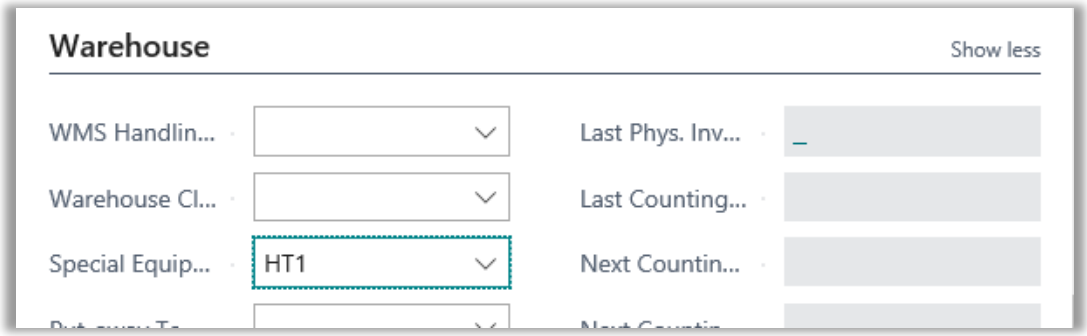


5. On the bottom of the screen, users will need to select the “X” button to close out of the pick line comment.

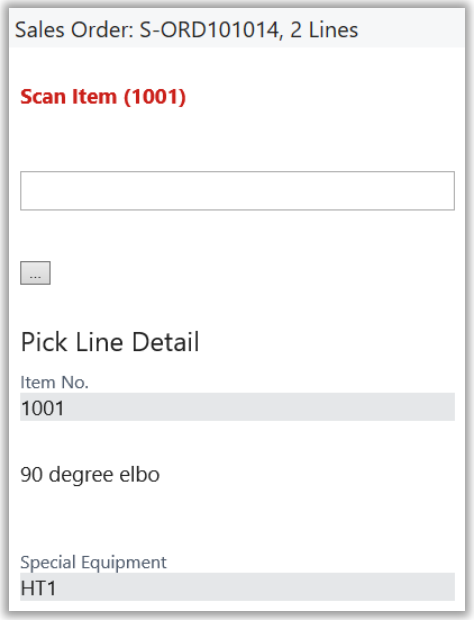
SPECIAL EQUIPMENT CODES

Is special equipment is required to handle an item, the special equipment code will show on the pick line detail as it appears to users.

The “Special Equipment Code” is identified for an item on the item card under the Warehouse fasttab:



The Special Equipment code will show on the WMS Picking screen if one is required.



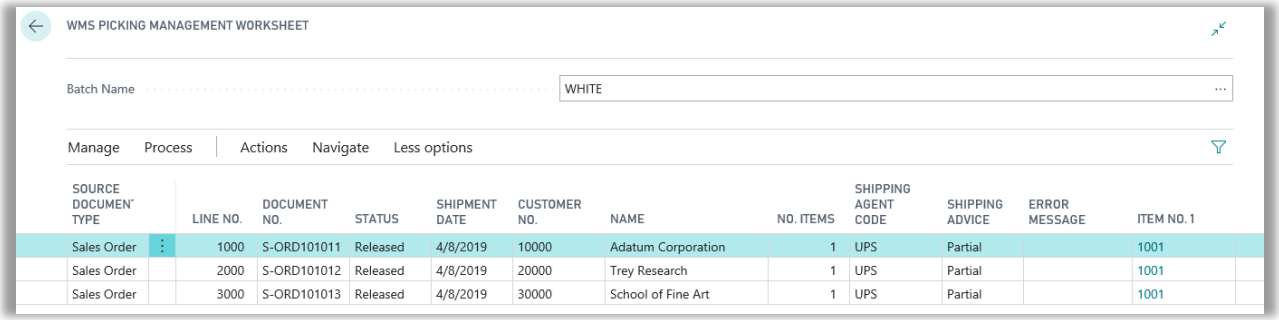
BULK PICKING

OVERVIEW

Bulk picking takes place in the picking process for order which contain a single line item of the same line item as other orders in the pick. Bulk picks are created when an influx of sales orders are placed for a single inventory item, and they should be placed on a single warehouse pick. Bulk picks are not assigned to a WMS Picking Cart at the time of pick creation or picking.

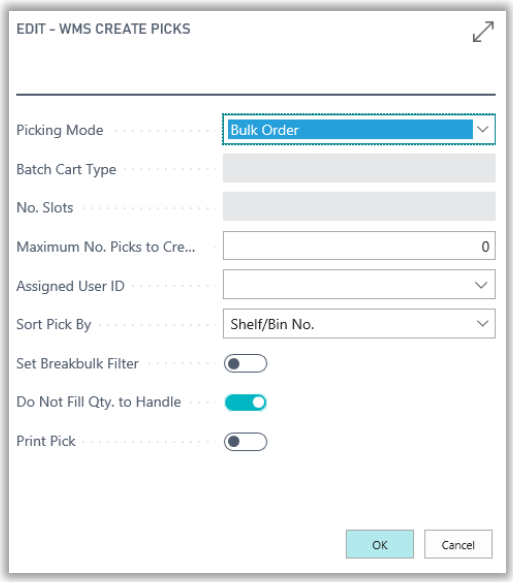
BULK PICK PROCESSING

1. To create a bulk pick, find a group of sales orders with the same inventory item and pull them into the Picking Management Worksheet.



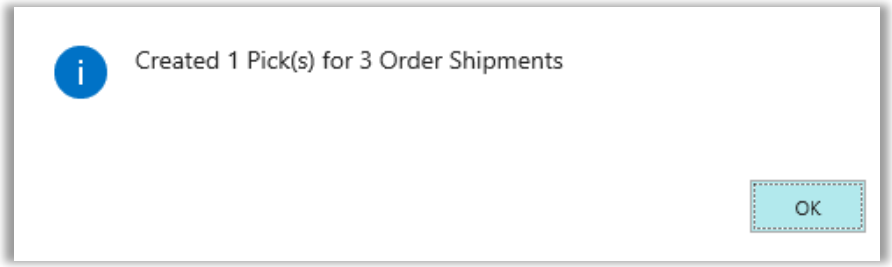
SOURCE DOCUMENT TYPE	LINE NO.	DOCUMENT NO.	STATUS	SHIPMENT DATE	CUSTOMER NO.	NAME	NO. ITEMS	SHIPPING AGENT CODE	SHIPPING ADVICE	ERROR MESSAGE	ITEM NO. 1
Sales Order	1000	S-ORD101011	Released	4/8/2019	10000	Adatum Corporation	1	UPS	Partial		1001
Sales Order	2000	S-ORD101012	Released	4/8/2019	20000	Trey Research	1	UPS	Partial		1001
Sales Order	3000	S-ORD101013	Released	4/8/2019	30000	School of Fine Art	1	UPS	Partial		1001

   a. Notice how the picks selected all have No. Items equal to 1. And, east item no. is 1001
2. Highlight the rows and Select “Create Picks”

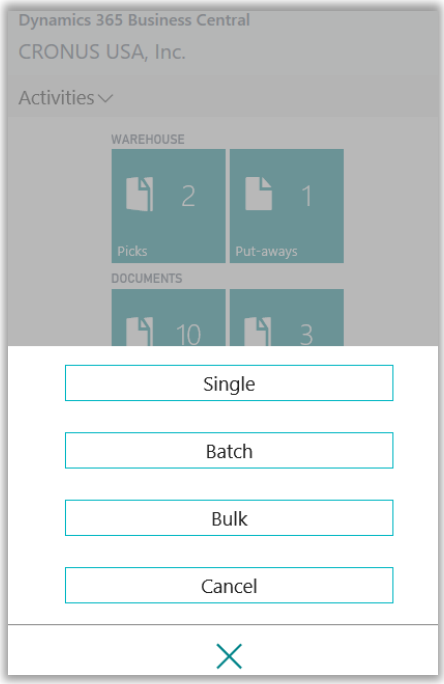


   a. From the Create Picks page, make sure to select picking mode of “Bulk Order”

3. Select “OK”. 1 pick will be created for the all the orders selected:

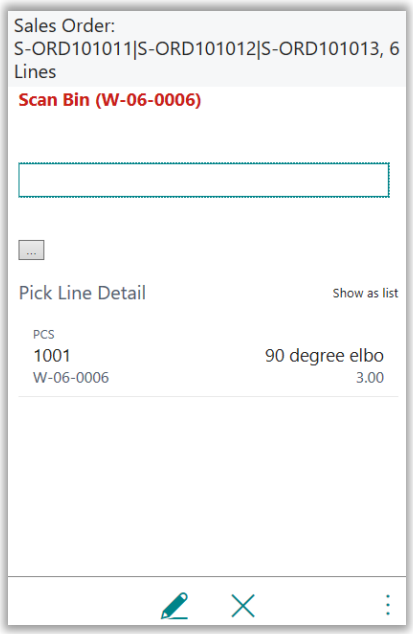


4. From the Wireless Role Center, select “Picks”
5. Select “Bulk” under the “Select Picking Mode” screen

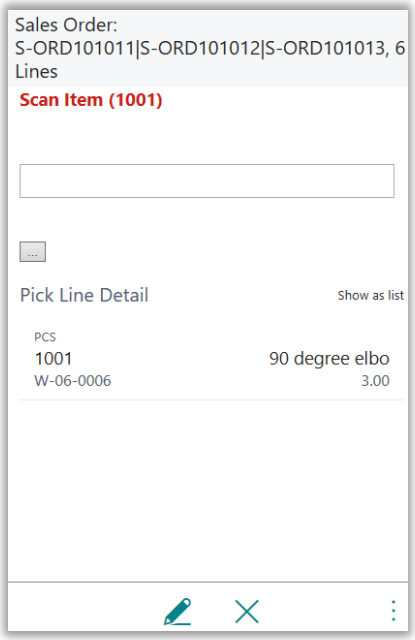


6. Follow the picking prompts:

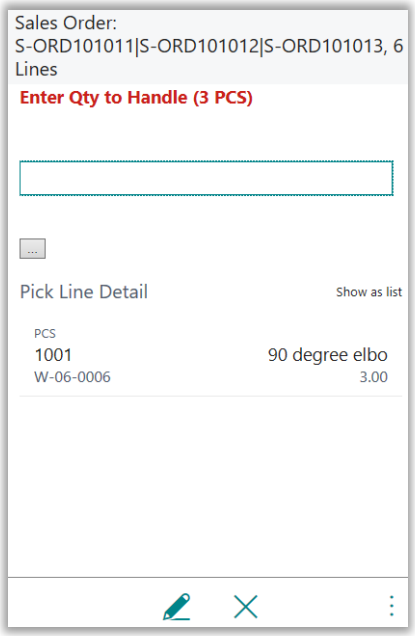
Scan Bin



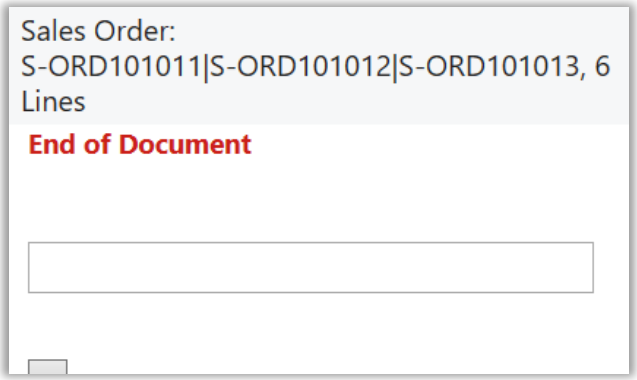
Scan Item



Enter Quantity to Handle



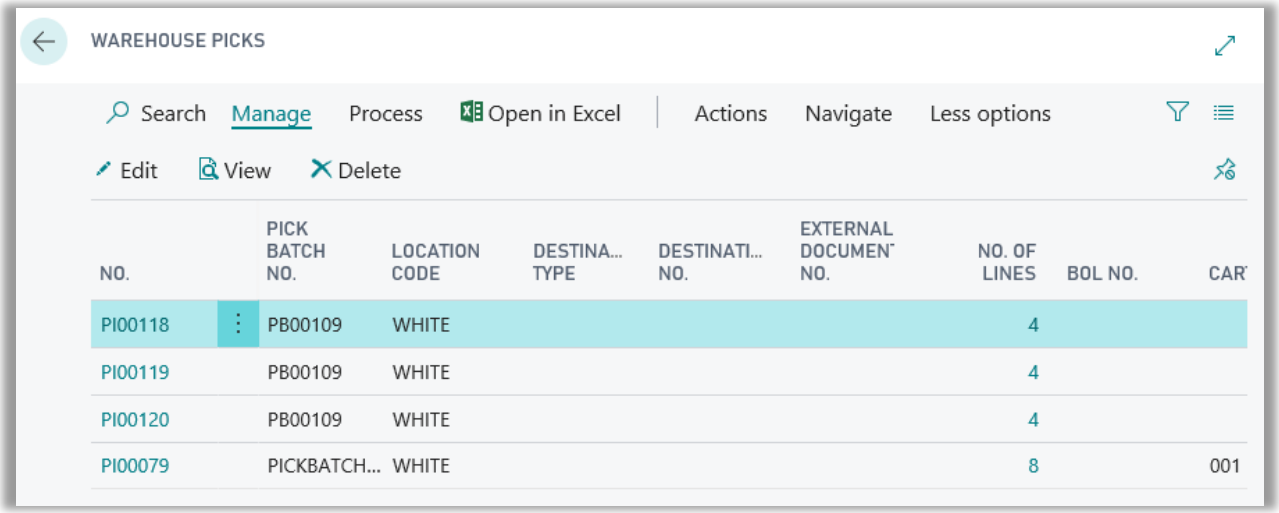
Once all items are handled, the “End of Document” screen will prompt for the users to register the pick by selecting the Ellipsis



PICK BATCHES

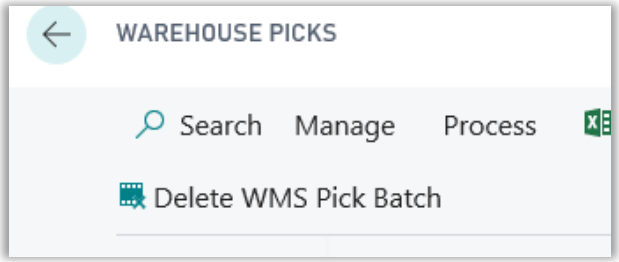
OVERVIEW

Picks are generated through the picking management worksheet with a unique Pick Batch No. The Pick Batch No. is a number which can be used to trace, as well as provide the ability to delete groups of picks when mistakes are made when generating picks. When creating picks, the pick inherits a batch no from a no. series setup. When looking at the pick list you can see the picks and which batches they were created in.

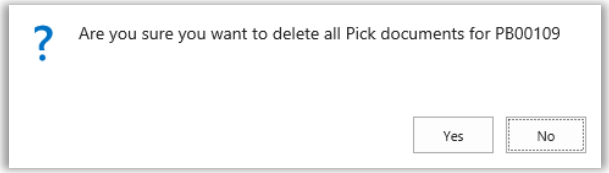


DELETING BATCHES

Warehouse picks can be deleted from the Warehouse Picks screen by batch no. by selecting Delete. All picks that were generated from the same batch that the line generated.



Accept the following message to delete all picks for the corresponding pick batch no.



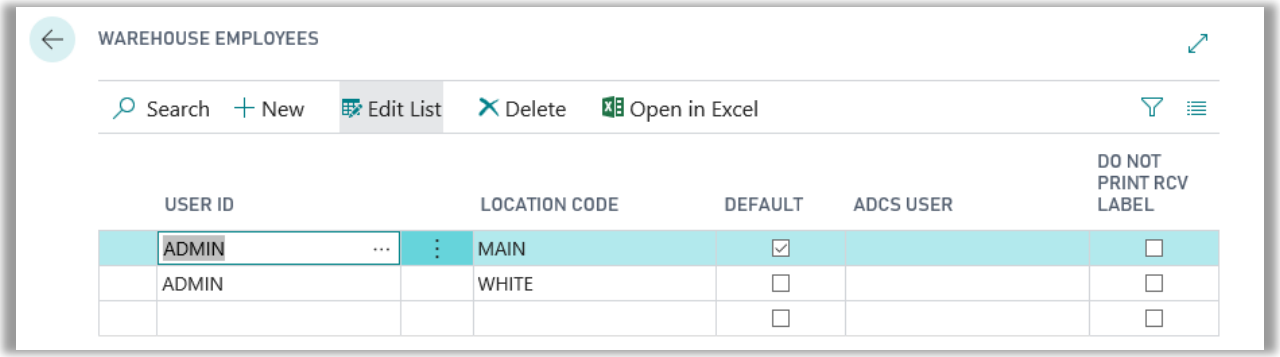
Setup and Administration

The following section provides information on setup and administration of WMS Data Collection

WAREHOUSE EMPLOYEE SETUP:

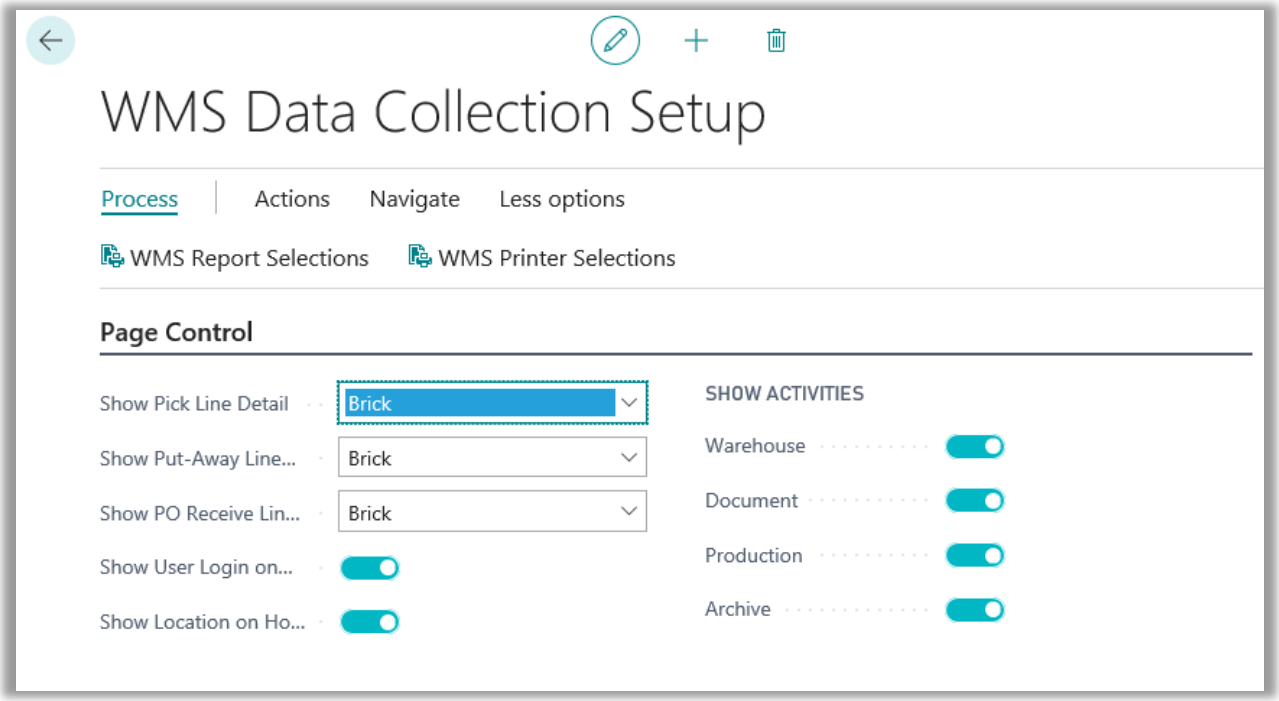
To enable a user to use the WMS system, you must ensure that they are a warehouse employee and that their locations are setup that they are working in.

Select their User ID and select the warehouse in which they are employed and select the default check box



WMS DATA COLLECTION SETUP:

Access the WMS Data Collection Setup screen by searching for “WMS Data Collection Setup”



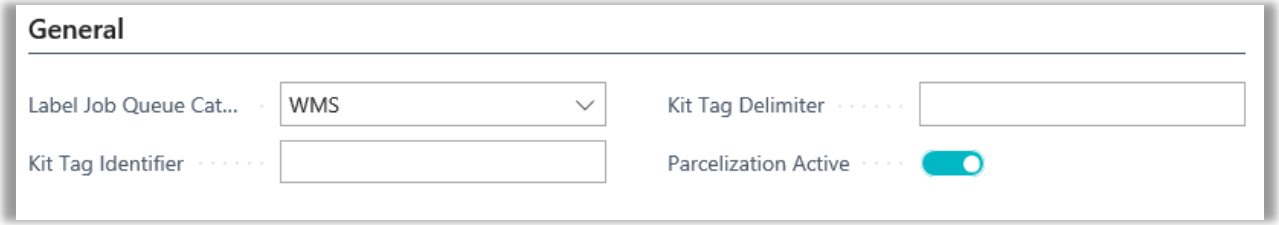
PAGE CONTROL (ABOVE)

Settings to control the rendering of the detail areas of the screens for Pick Lines, Put Away Lines and Receiving Lines.

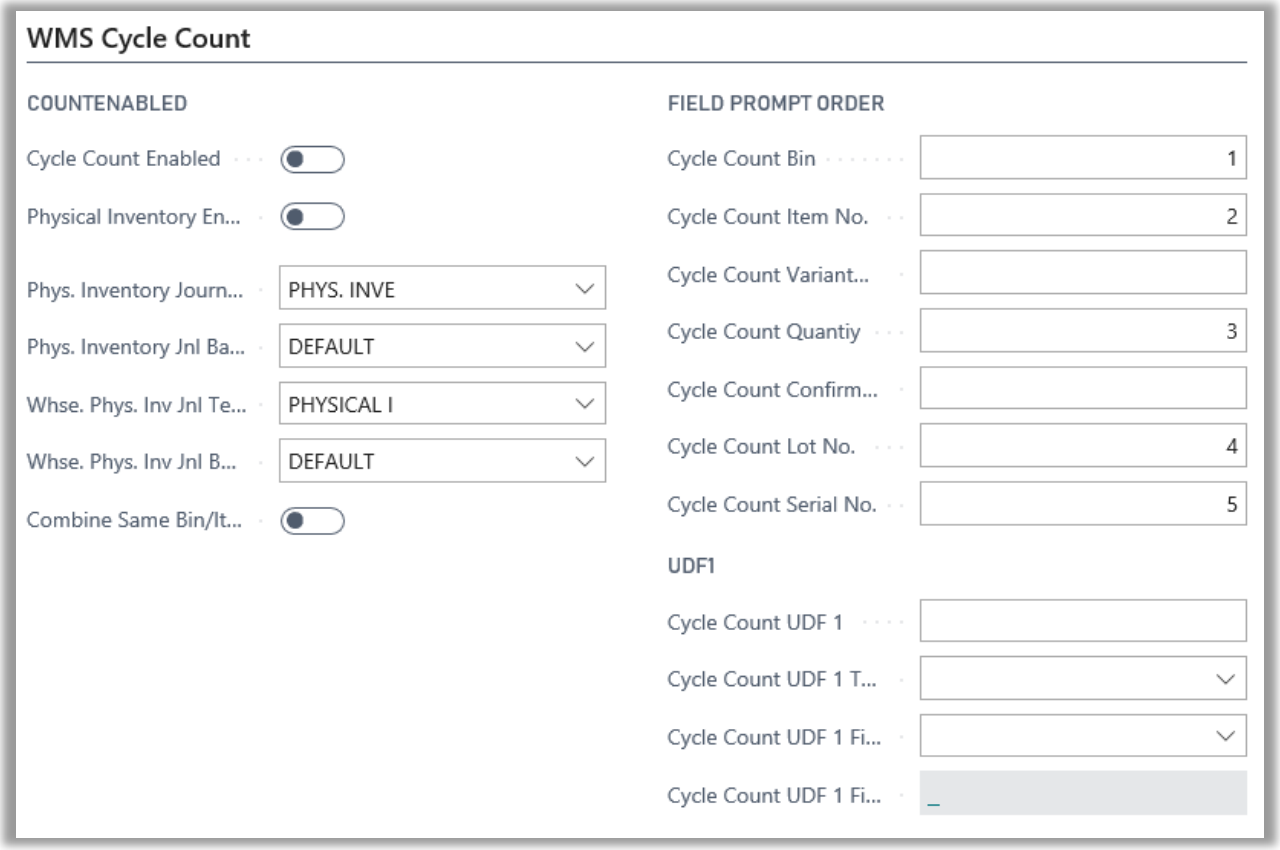
Show Activities: Controls the cues that appear on the WMS roll center.

GENERAL

Contains information related to Job Queue categories to be used in processing, Item creation etc.

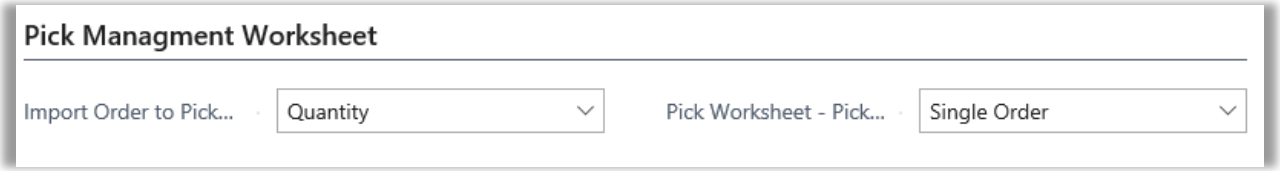


WMS CYCLE COUNTS:



When performing cycle counts on the handheld, the process writes to the following templates and batches. The field Prompt Order will control the order that fields show up. If set to zero or blank then that field will not show.

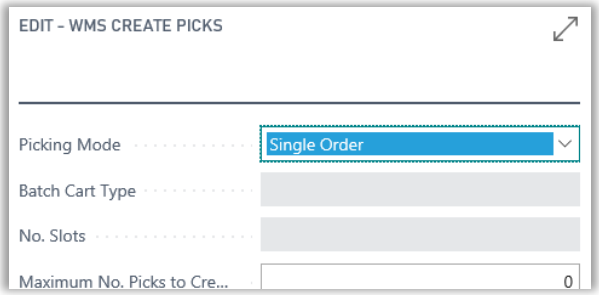
PICKING MANAGEMENT WORKSHEET:



When orders are brought into the Picking Management Worksheet, they are sorted in the method indicated on the setup menu. The options are as follow:

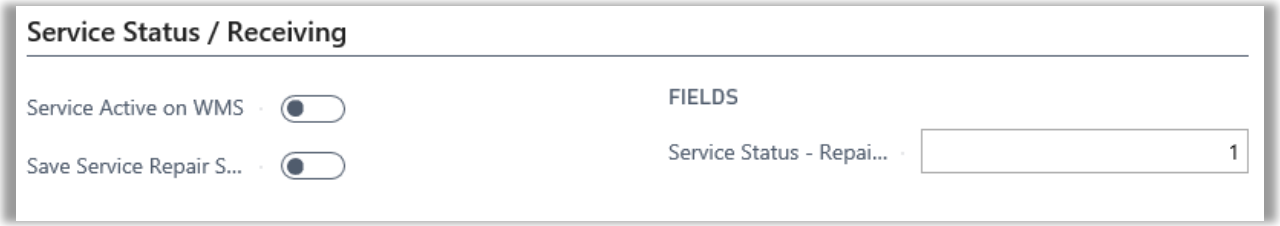
- **Quantity**: Order brought in will be sorted ascending based on order quantity
- **No. of Order Lines**: Orders brought into the worksheet are sorted ascending by the no. of order lines.

Pick Worksheet – Picking Mode: This is the default picking mode selected when creating pick from the picking management worksheet.



PACK OUT:

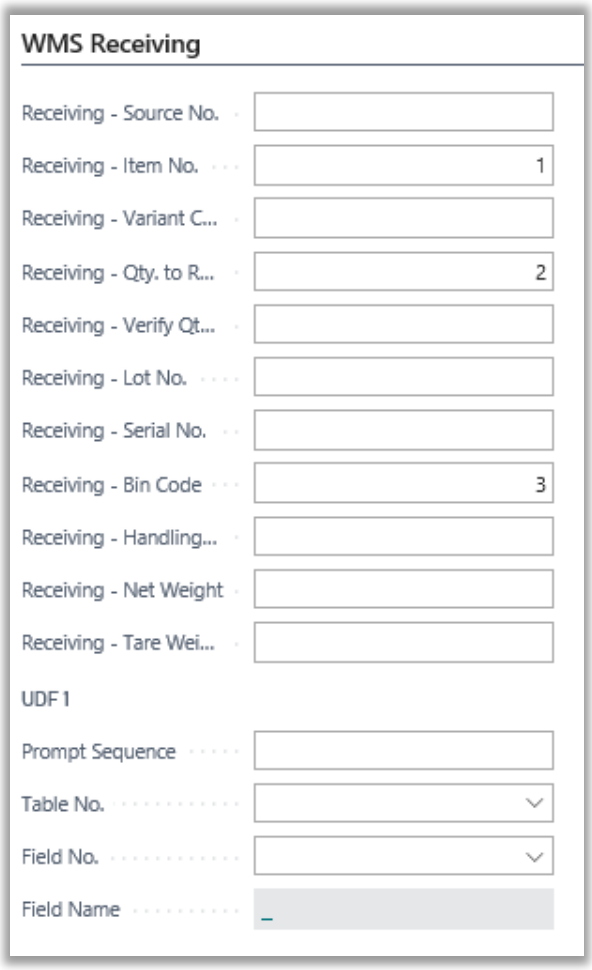
SERVICE STATUS / RECEIVING:



TRANSACTION FAST TABS (WIRELESS RECEIVING, CONSUMPTION, PICKING ETC.)

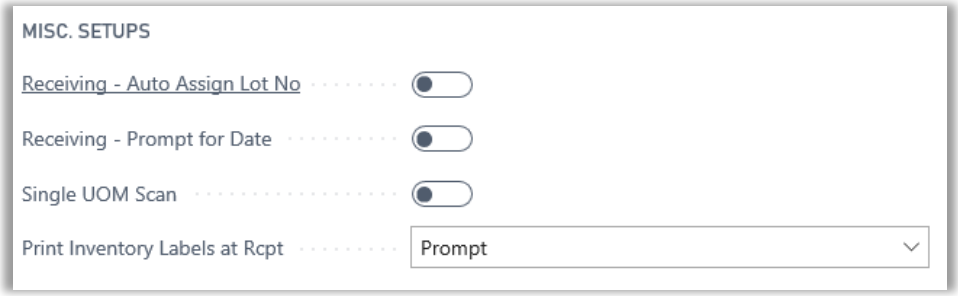
Prompt orders and displays can be controlled here by sequencing the screens through the use of an integer:

WMS Receiving:



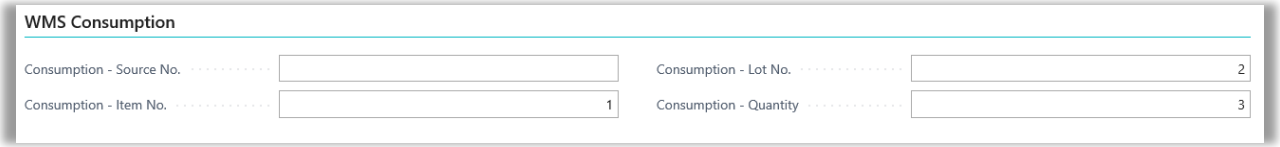
Under the wireless receiving menu, you will have the ability to select the order in which you would like the prompts to appear on the handheld interface. Note: If you select “0” the prompt will not appear on the screen. There are 7 User Defined Fields that can be prompted for.

MISC. SETUPS



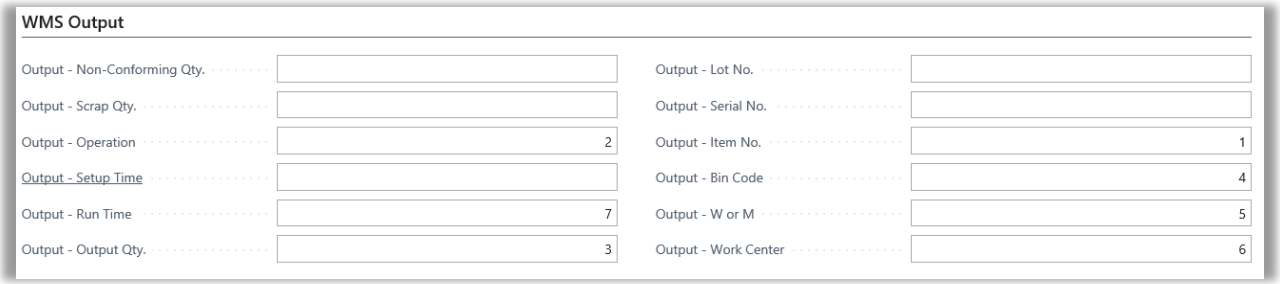
- Receiving - Auto Assign Lot No: Will generate a lot number if not supplied.
- Prompt for Date: System will use the current date as the posting date received. If processing does not always happen on the same date the system can be configured to prompt for the date the receipt occurred.
- Single UOM Scan: when a bar code is scanned, the quantity is assumed as 1. If the bar code is for a pallet, box, etc. it will be a scan for one pallet.
- Print Inventory Labels at rcpt. WMS can print an inventory label. The system can automatically print or prompt if the label should print.

WMS Consumption:



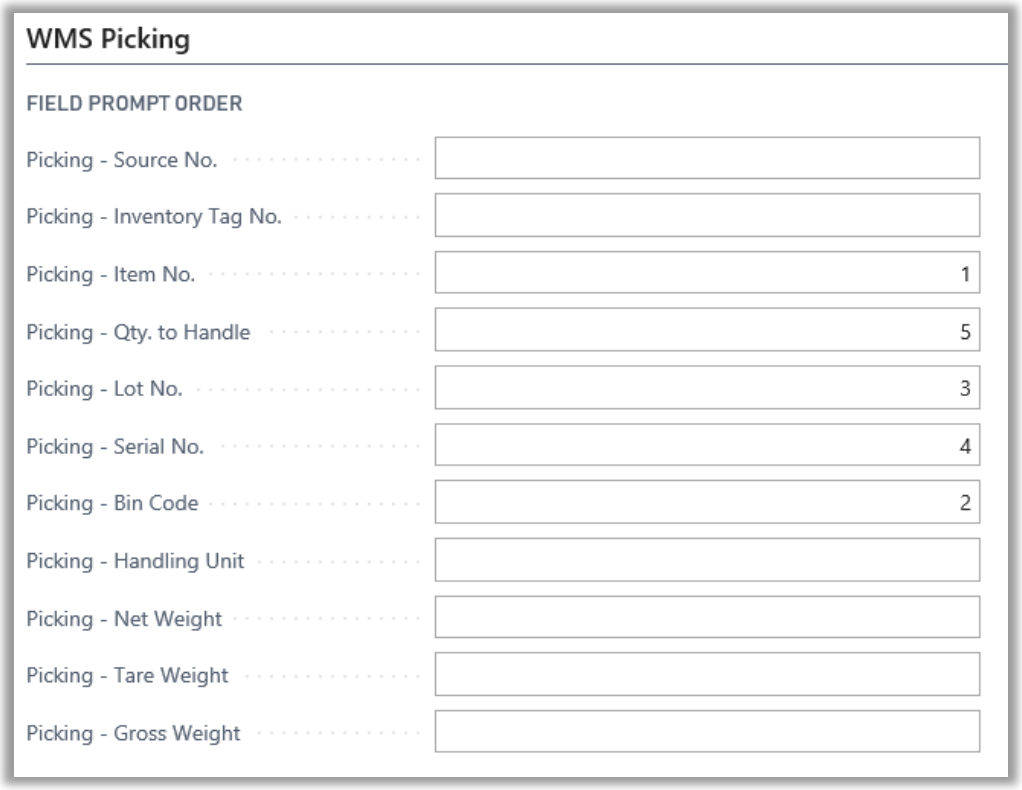
Controls the order that fields are prompted for. Entry of blank or zero will cause the field to not be asked for.

Wireless Output:

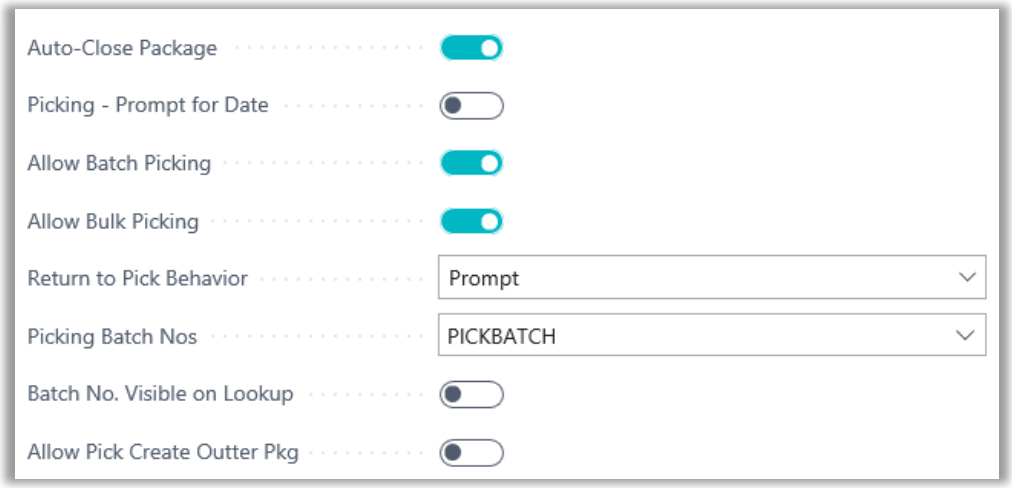


Controls the order that fields are prompted for. Entry of blank or zero will cause the field to not be asked for.

WMS Picking:



Field Prompt Order Section: This section drives the field prompt order for the prompts displayed on the handheld devices



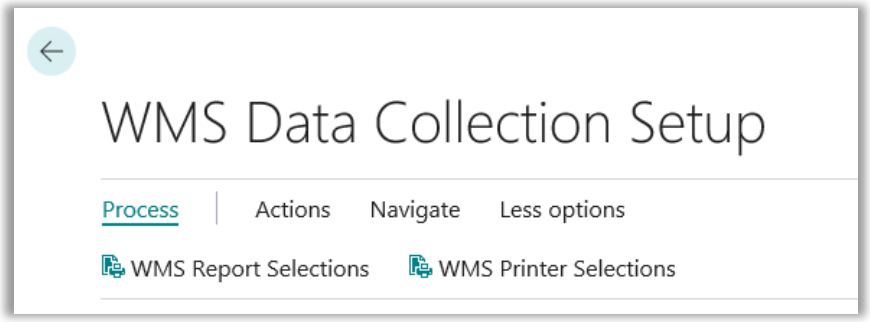
Pick Batch Nos.: Picks created will have a batch no. generated to track the picking batch.

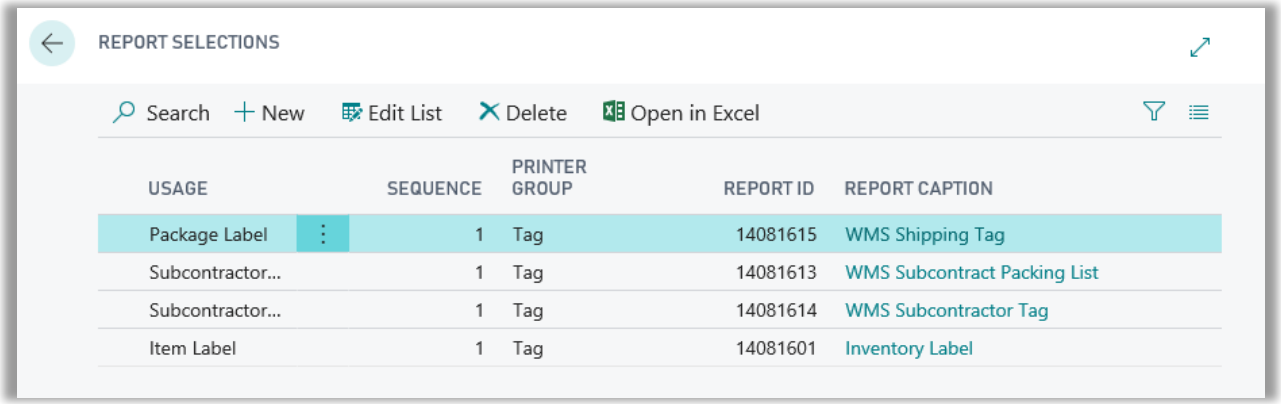
LABEL PRINTING AND USAGES

WMS Report Selections:

A report selection page is available in WMS Data Collection from the “WMS Report Selections” Page. With the selection of a report in this table, a database event will be triggered based upon transactions as laid out in the following section.

In the event of multiple reports needing to be printed from a single transaction, the “Sequence” column may be used to specify the sequence of printing the tag should occur in.





The following Labels Print based on events in the Database:

- **Output Header:**

  Prints a label based upon the output of a production order.

- **Output Line**

  Prints an output label based upon item ledger entries created as a result of production output. Positive adjustments in the item ledger entry based upon production output are printed.

-

  Prints a label based upon the entries created in the item ledger entries as a result of production or assembly consumption

- **Purch. Receipt Inventory Tag**

  Prints an inventory tag upon the receipt of inventory on the purchase receipt lines. The purchase receipt inventory tag is printed after a purchase order is posted, or a warehouse receipt is posted (depending on the level of warehousing being used)

- **Movement Tag**

  Prints for all transactions not tied to a Sales Order or Movement of inventory to a production staging bin. The Movement tag usage is triggered off of a movement of inventory and a positive adjustment in the warehouse entry. The movement tag does not contain Bin Specific information, but just tags inventory with an Item No, Quantity etc.

  The Movement tag will be printed based upon all activity in the Whse. Entry table with the exception of the following source documents:

  - Sales Order
  - Production Consumption

- **Warehouse Pick**
  Picking will normally print report 5751 “Picking List” upon the creation of a warehouse pick, or a reprint. WMS will allow for the selection of a custom picking list report to be printed when a warehouse pick Is printed based on the selection in WMS Report Selection.

- **Packing List**

  This report selection is a placeholder for companies who choose to have a custom packing list in place when shipping product.

- **Package Label**

  The Package Label report is printed based upon the action of Closing a record in the License Plate Table.

- **Bin and Movement Tag**
  The bin and movement tag are printed based upon the all transactions in the whse. entry table with the exception of the following Source Documents:

  - Sales Order
  - Production Consumption
  - Purchase Order