



WMS DATA COLLECTION

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.

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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:

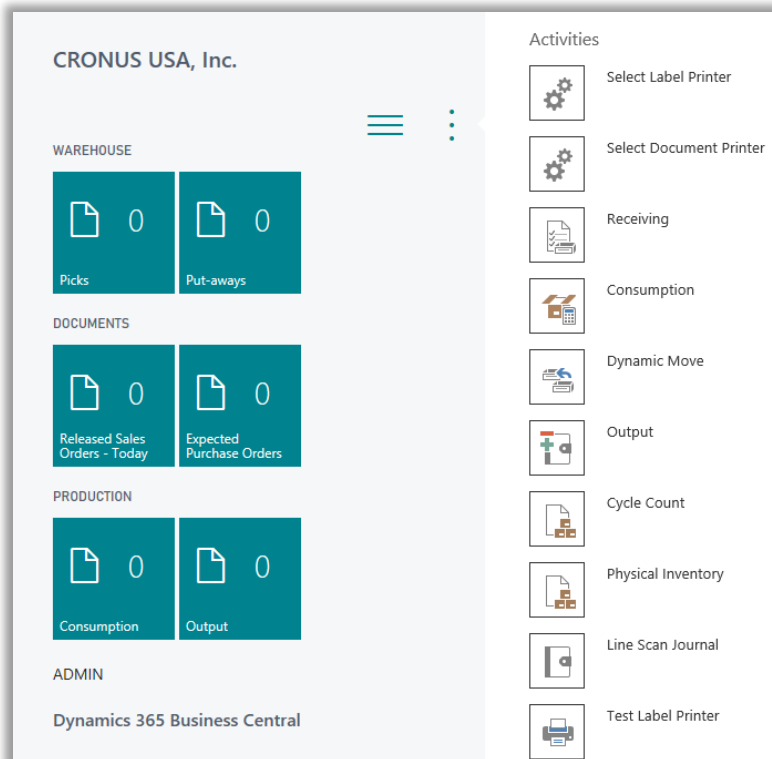
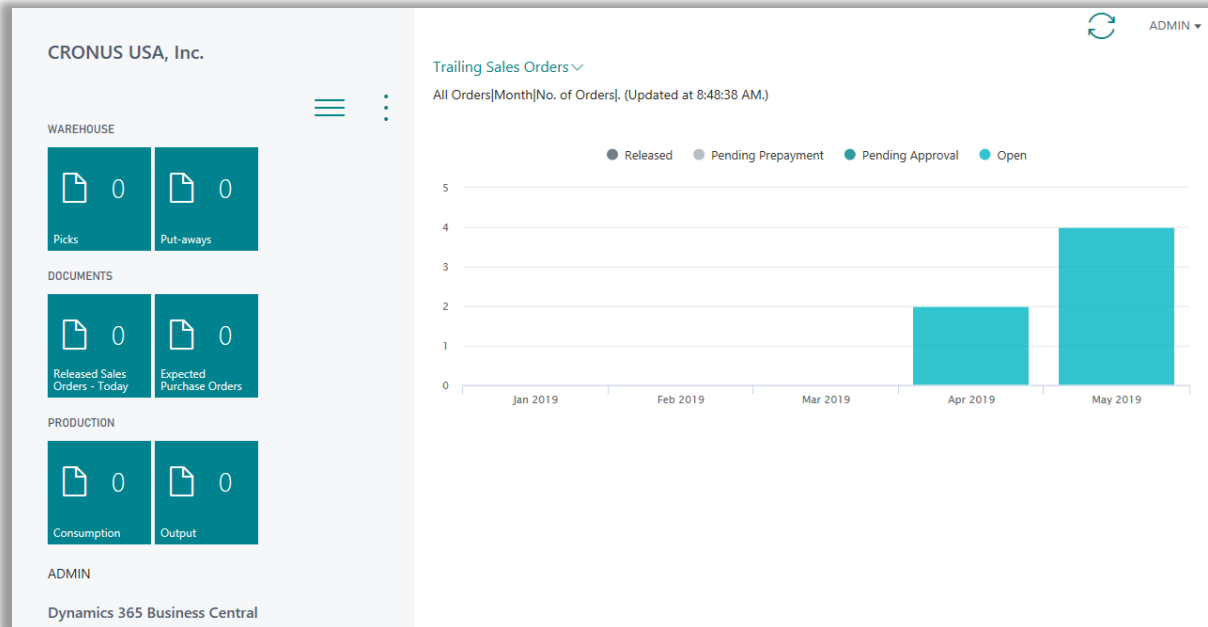
- Picks
- Put away
- Expected Purchase Orders
- Released Sales Orders
- Registered Picks
- Registered Put-Aways
- Consumption
- Output

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

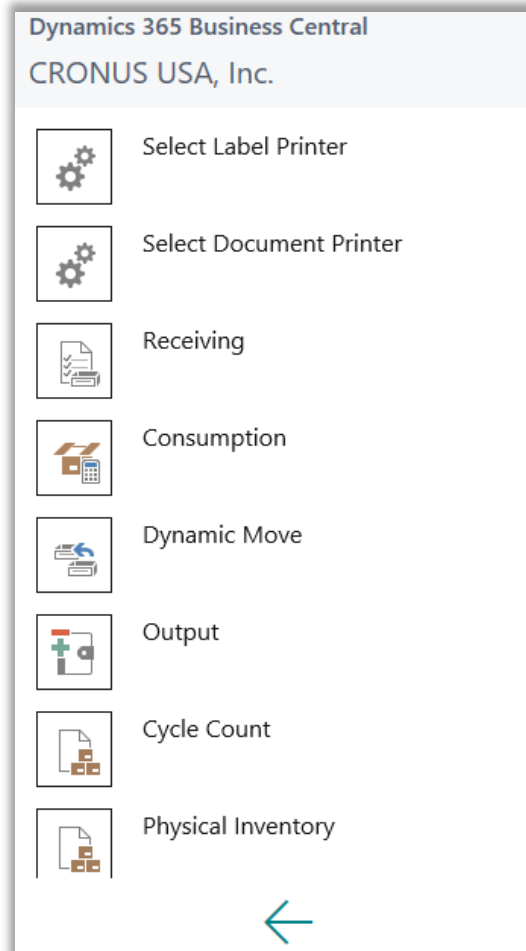
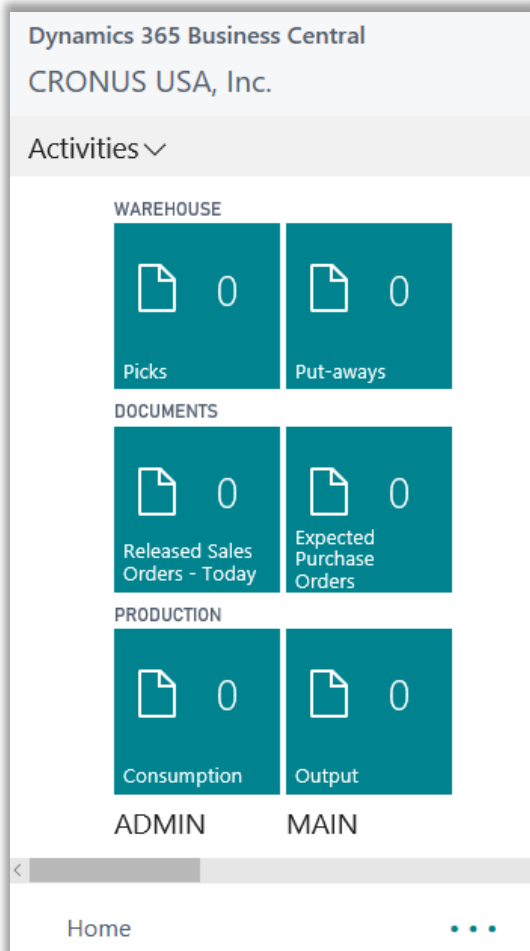
From the activities dropdown you can perform:

- 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.

Scan Document to start Picking

Scan Document to start Picking

...

✓
✗

Pick List

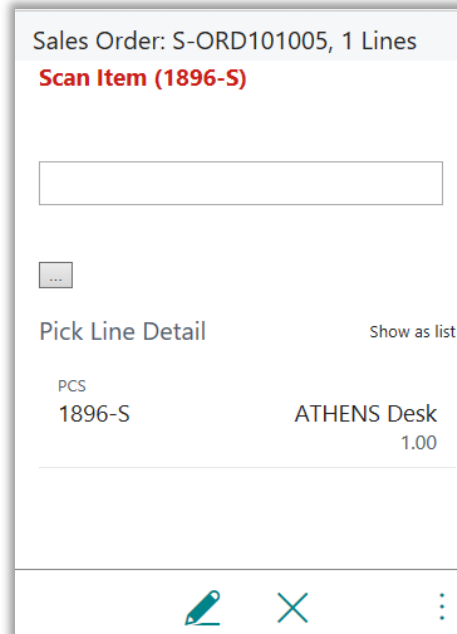
IPK-000000
 SO S-ORD101005
 4/8/2019

IPK-000001
 SO S-ORD101006
 4/8/2019

✗
⋮

- 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 screenshot shows a mobile application interface for a warehouse picking task. At the top, it displays 'Sales Order: S-ORD101005, 1 Lines' in a light blue header. Below this, a red prompt 'Scan Item (1896-S)' is shown. There is a large empty rectangular input field for scanning. Below the input field is a small square button with three dots. The main section is titled 'Pick Line Detail' with a 'Show as list' link on the right. It contains a table with two columns: 'PCS' and 'ATHENS Desk'. The first row shows '1896-S' under 'PCS' and '1.00' under 'ATHENS Desk'. At the bottom of the screen is a navigation bar with three icons: a pencil, a close 'X' button, and a menu 'three dots' button.

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)

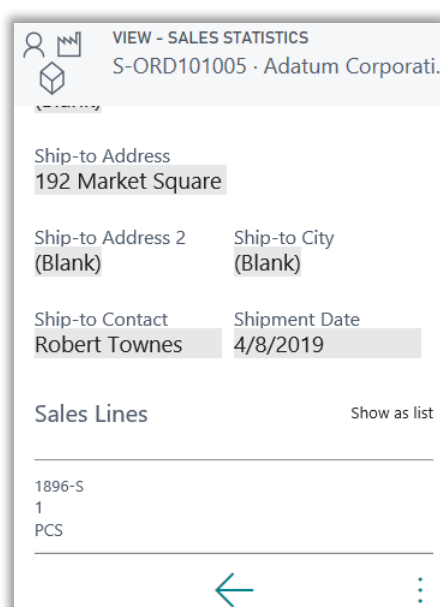
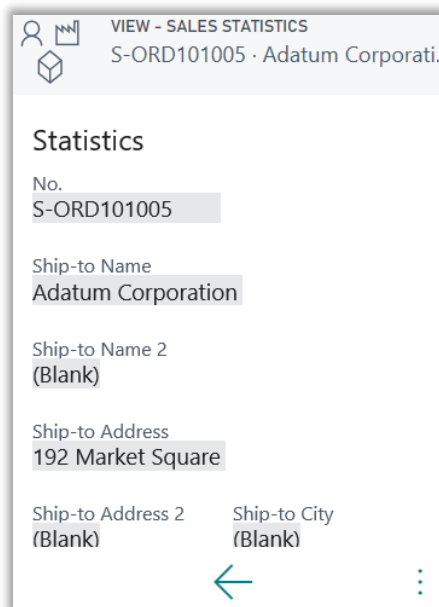
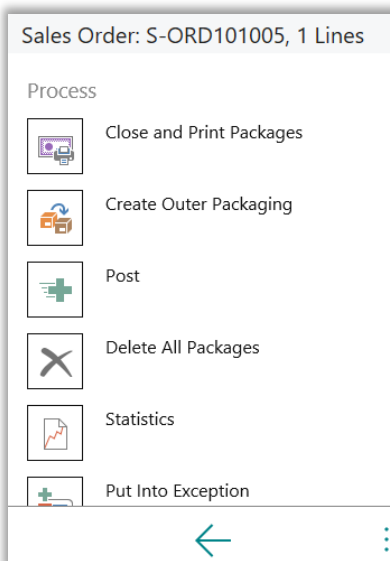
Note: If you need to go back a field enter in a minus sign on the field and it will bring you to the last prompt

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.

Scan Document to start receiving

Scan Document to start receiving

...

✓
✗

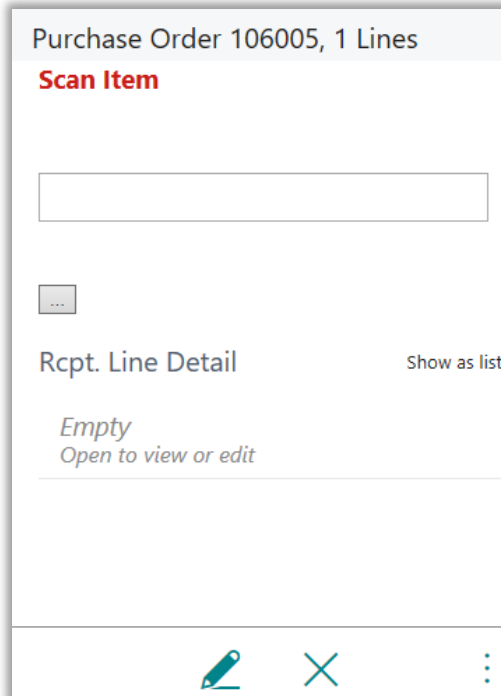
Expected Receipts

106005 Fabrikam, Inc. MAIN	4/8/2019 Purchase
1004 East Warehouse MAIN	4/8/2019 Transfer

✗
⋮

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.



Purchase Order 106005, 1 Lines

Scan Item

...

Rcpt. Line Detail Show as list

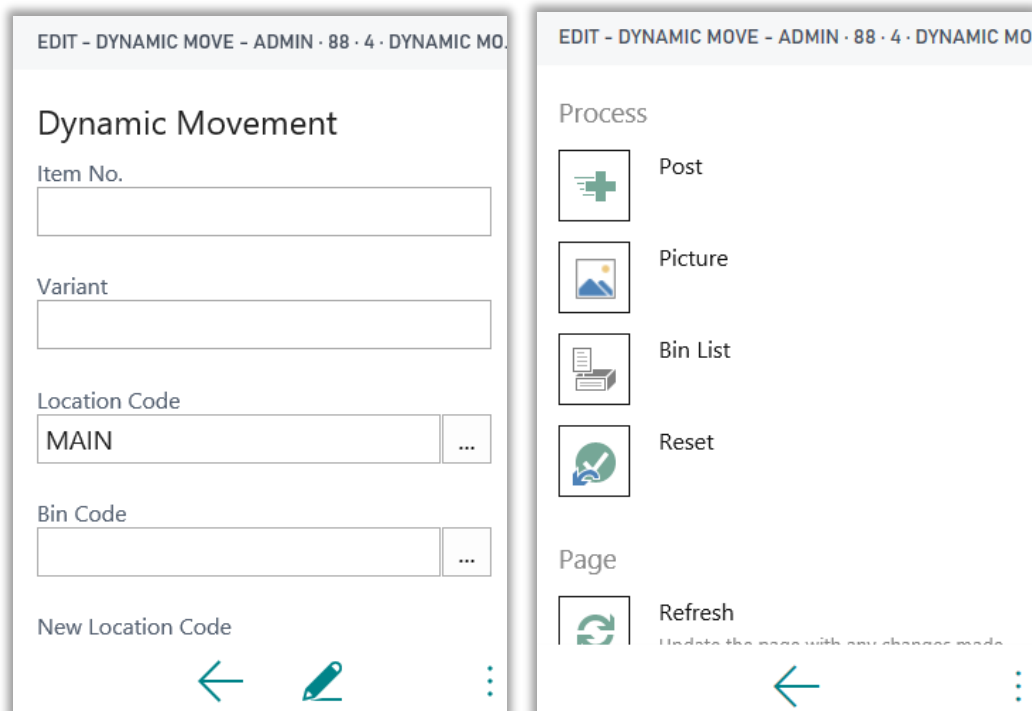
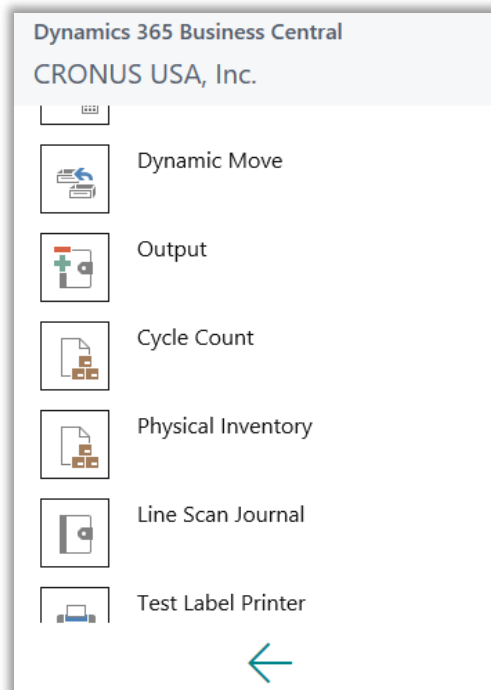
Empty
Open to view or edit

✎ ✕ ⋮

- 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.

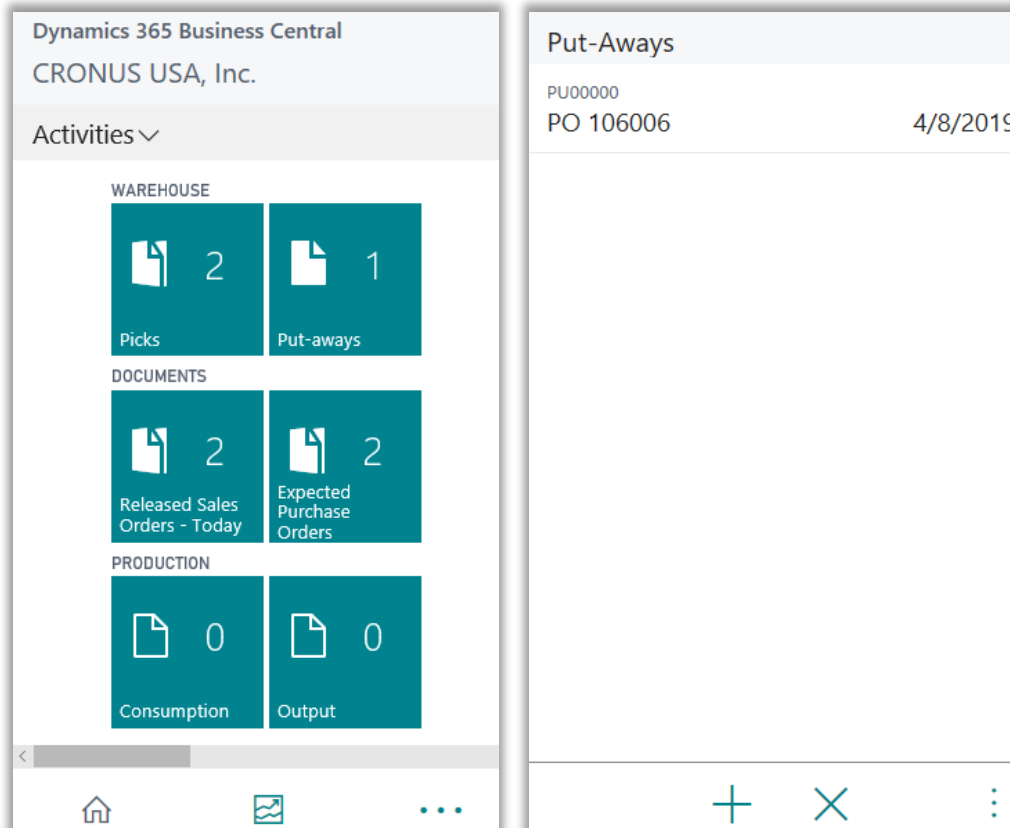
The warehouse employee will

- 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.

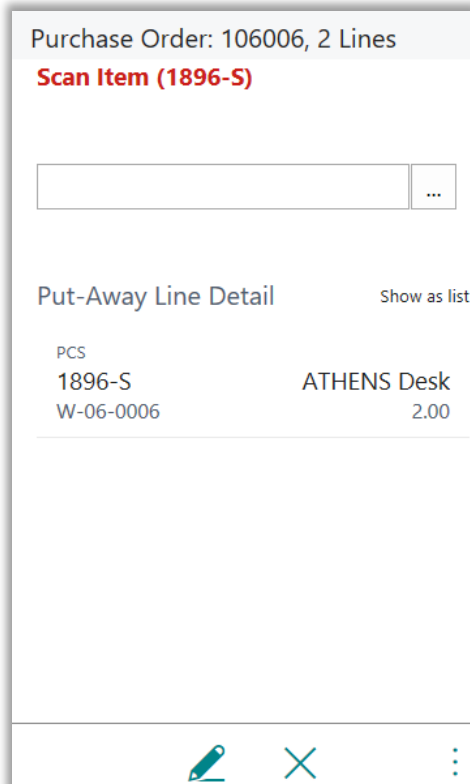
PUT-AWAY

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.






Purchase Order: 106006, 2 Lines

Scan Item (1896-S)

...

Put-Away Line Detail Show as list

PCS	
1896-S	ATHENS Desk
W-06-0006	2.00

- 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

EDIT - SIK-WMS ITEM BIN SEARCH - FIND ITEM

Enter Filters

Item No.

Bin Content

RECEIVE1	
1900-S	
4	PCS
W-06-0006	
1900-S	
4	PCS

VIEW - SIK-WMS BIN CONTENT CARD

WHITE · W-06-0006 · 1900-S · PCS

General

Zone Code: PICK Bin Code: W-06-0006

Item No.: 1900-S Quantity: 4

Unit of Measure Code: PCS Pick Qty.: 0

Put-away Qty.: 4 Default: ☐

Quantity (Base): 4 Min. Qty.: 0

Max. Qty.: 0 Bin Ranking: 100

CRONUS USA, Inc.

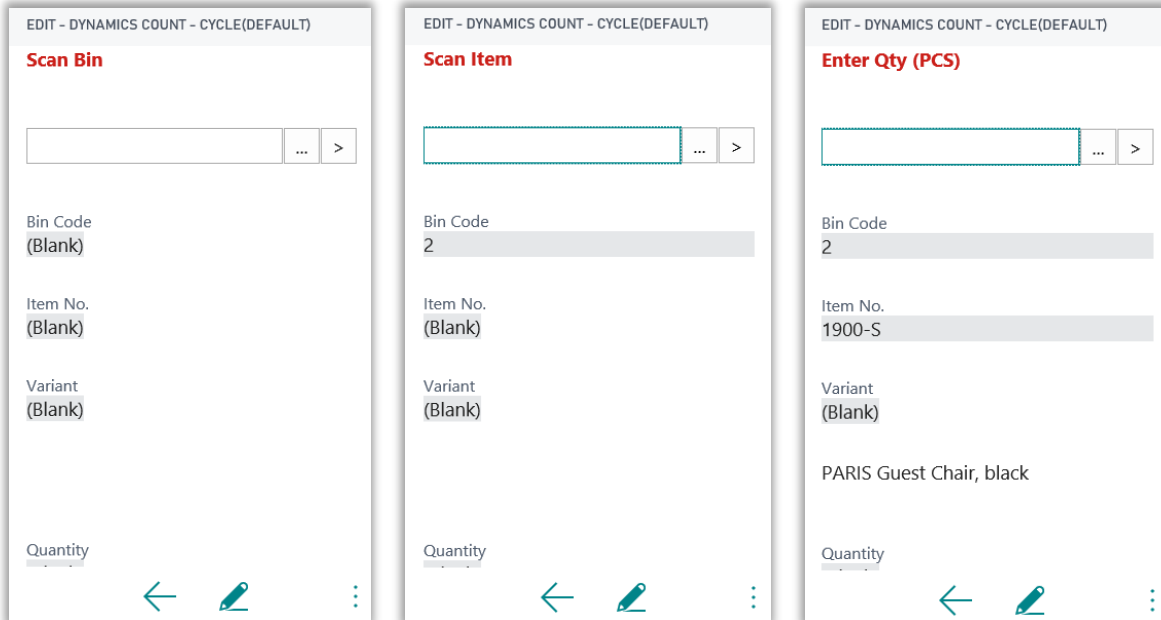
Warehouse Entries

4	
4/8/2019	4
	1900-S

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.



The image displays three sequential screenshots of a mobile application interface for cycle counting. Each screen has a title bar 'EDIT - DYNAMICS COUNT - CYCLE(DEFAULT)' and a red header indicating the current step.

- Screen 1: Scan Bin** - The red header is 'Scan Bin'. It features a text input field at the top, followed by labels and input fields for 'Bin Code' (value: (Blank)), 'Item No.' (value: (Blank)), and 'Variant' (value: (Blank)). At the bottom, there is a 'Quantity' field and three navigation icons: a back arrow, a pencil icon, and a three-dot menu icon.
- Screen 2: Scan Item** - The red header is 'Scan Item'. It features a text input field at the top, followed by labels and input fields for 'Bin Code' (value: 2), 'Item No.' (value: (Blank)), and 'Variant' (value: (Blank)). At the bottom, there is a 'Quantity' field and the same three navigation icons.
- Screen 3: Enter Qty (PCS)** - The red header is 'Enter Qty (PCS)'. It features a text input field at the top, followed by labels and input fields for 'Bin Code' (value: 2), 'Item No.' (value: 1900-S), and 'Variant' (value: (Blank)). Below the variant field, the text 'PARIS Guest Chair, black' is displayed. At the bottom, there is a 'Quantity' field and the same three navigation icons.

- 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.

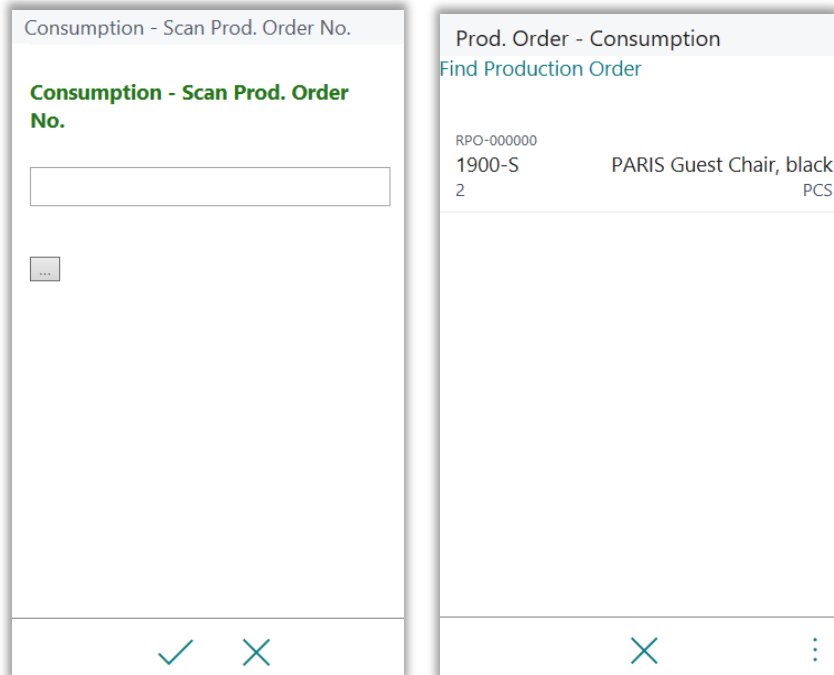
Bin Contents will display what items are in the bin being counted.

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.



The left screenshot shows the 'Consumption - Scan Prod. Order No.' screen. It has a title bar 'Consumption - Scan Prod. Order No.' and a green header 'Consumption - Scan Prod. Order No.'. Below the header is a text input field. At the bottom, there is a small icon and a navigation bar with a checkmark and an 'X'.

The right screenshot shows the 'Prod. Order - Consumption' screen. It has a title bar 'Prod. Order - Consumption' and a blue header 'Find Production Order'. Below the header, there is a list of production orders:

RPO-000000	1900-S	PARIS Guest Chair, black
2		PCS

At the bottom, there is a navigation bar with an 'X' and a vertical ellipsis.

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.




Prod. Order RPO-000000, Item 1900-S,
Quantity 2, Remaining Quantity 2

Consumption
Scan Item

Item No.
(Blank)

Quantity	Qty. Outstanding
(Blank)	0.00

Unit of Measure Code

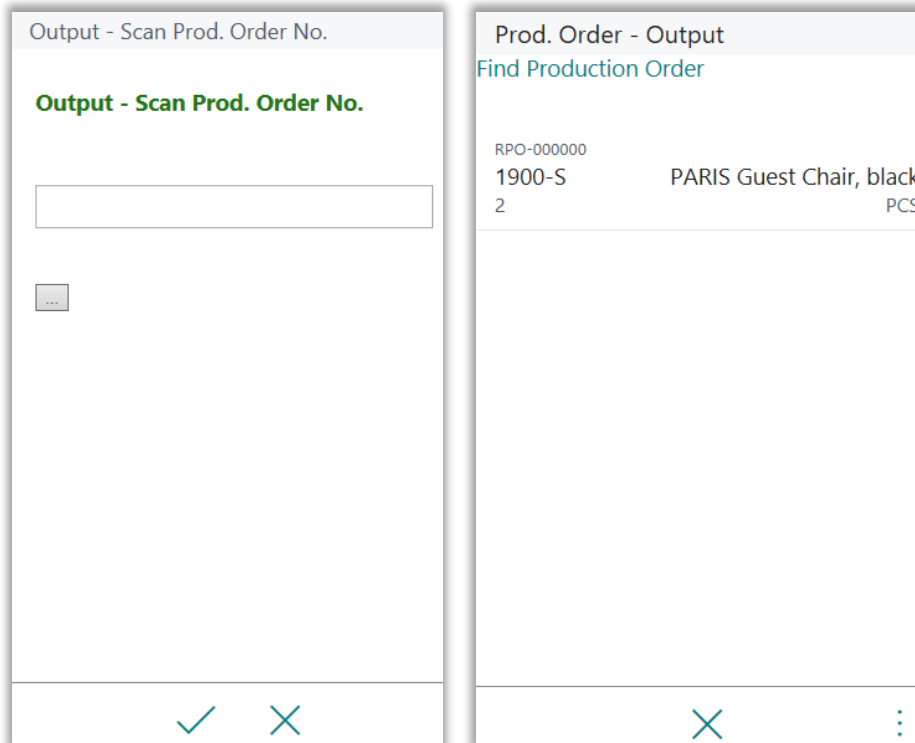




- Scan/Enter Item Number
- Enter Quantity
- At the end of each item entry the warehouse employee will process the production order on the actions. This will post the consumption of the component.

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.



Output - Scan Prod. Order No.

Output - Scan Prod. Order No.

...

✓ ✕

Prod. Order - Output

[Find Production Order](#)

RPO-000000	
1900-S	PARIS Guest Chair, black
2	PCS

✕ ⋮

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 screenshot displays a mobile application interface for a warehouse employee. At the top, a header bar contains the text: "Prod. Order RPO-000000, Item 1900-S, Quantity 2, Remaining Quantity 2". Below this, the section is titled "Output". A red prompt "Scan Item No." is displayed above a text input field. The input field is currently empty and has a small menu icon (three dots) to its right. Below the input field, the text "Operation No." is followed by "(Blank)". Further down, there are two input fields: "Setup Time" with the value "0.00" and "Run Time" with the value "0.00". Below these, the text "Type" is followed by "Work Center". At the bottom, the text "No." is followed by an empty input field. The bottom of the screen features a navigation bar with three icons: a pencil (edit), a cross (cancel), and a three-dot menu (options).

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

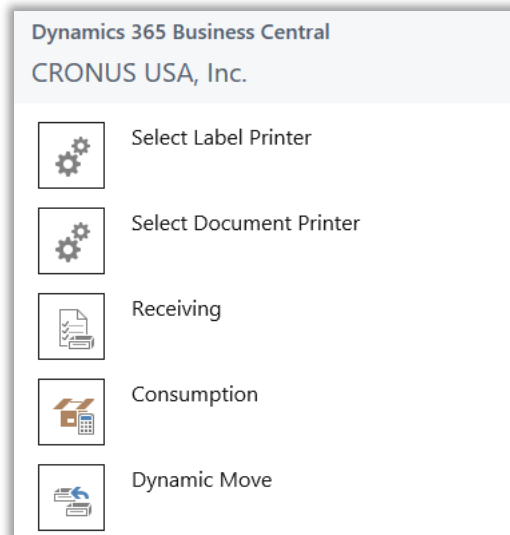
- Enter or Scan the operation step
- Enter the Setup Time (can be zero)
- Enter the Run Time (can be zero)
- Enter the Output Quantity (can be zero)
- Enter the Scrap Quantity (can be zero)
- When complete, Process the production order from the actions.

Key Usage Scenarios

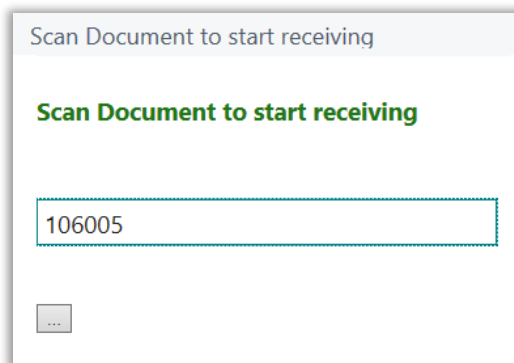
The following section will outline some key usage scenarios.

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 (...)

Expected Receipts		
106005	Fabrikam, Inc. MAIN	4/8/2019 Purchase
106006	Fabrikam, Inc. WHITE	4/8/2019 Purchase
1004	East Warehouse MAIN	4/8/2019 Transfer

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.

Purchase Order 106006, 2 Lines

Scan Item

Rcpt. Line Detail
Show as list

Empty
Open to view or edit

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

Purchase Order 106006, 2 Lines

Enter Qty to Receive (PCS)

1

...

Rcpt. Line Detail

Show as list

PCS


1900-S


Qty. Outstanding 0


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


Purchase Order 106006, 2 Lines


Process



Print Rcpt Preview



Create Inv. Tag Label


Post & Print Tags


Post


Reset


Statistics


Next Record

←
⋮

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

106006 · Fabrikam, Inc.

Buy-from Vendor No.	Name
10000	Fabrikam, Inc.

Address

10 North Lake Avenue



City	Purchaser Code
(Blank)	(Blank)

Order Date	Expected Receipt Date
4/8/2019	(Blank)

Lines

Show as list


1896-S	0.00
PCS	
1900-S	0.00
PCS	






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


Purchase Order 106006, 2 Lines


Process


 Print Rcpt Preview


 Create Inv. Tag Label



 Post & Print Tags

 Post

 Reset

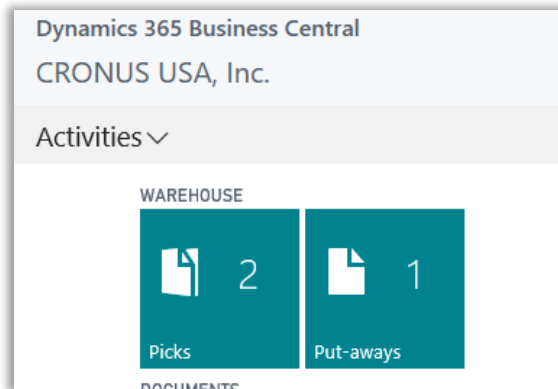
 Statistics

 Next Record

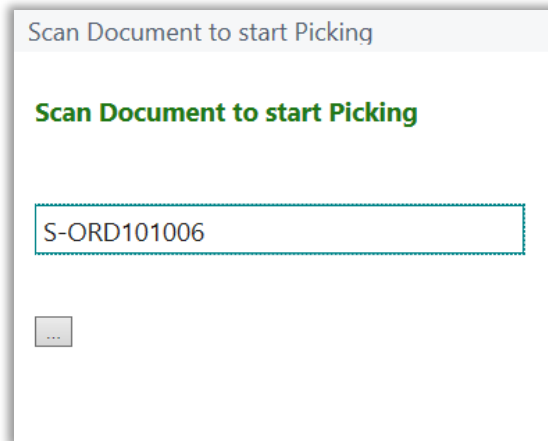



PICKING

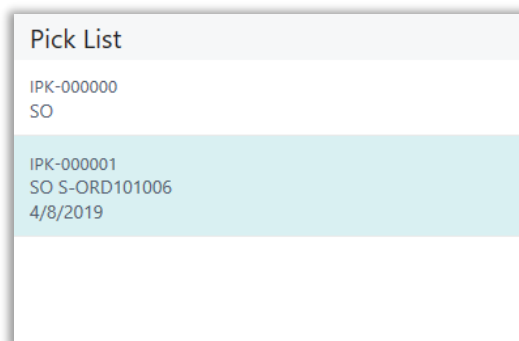
To process a warehouse pick, select a warehouse pick form the pick queues.



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

Sales Order: S-ORD101006, 1 Lines

Scan Item (1896-S)

Pick Line Detail
Show as list

PCS
1896-S

ATHENS Desk
1.00

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

Sales Order: S-ORD101006, 1 Lines

Enter Qty to Handle (1 PCS)

Pick Line Detail
Show as list

PCS
1896-S

ATHENS Desk
1.00




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

Sales Order: S-ORD101006, 1 Lines

End of Document


Pick Line Detail Show as list


PCS 1896-S	ATHENS Desk 1.00
---------------	---------------------







Sales Order: S-ORD101006, 1 Lines


Process




Close and Print Packages


Create Outer Packaging


Post


Delete All Packages


Statistics

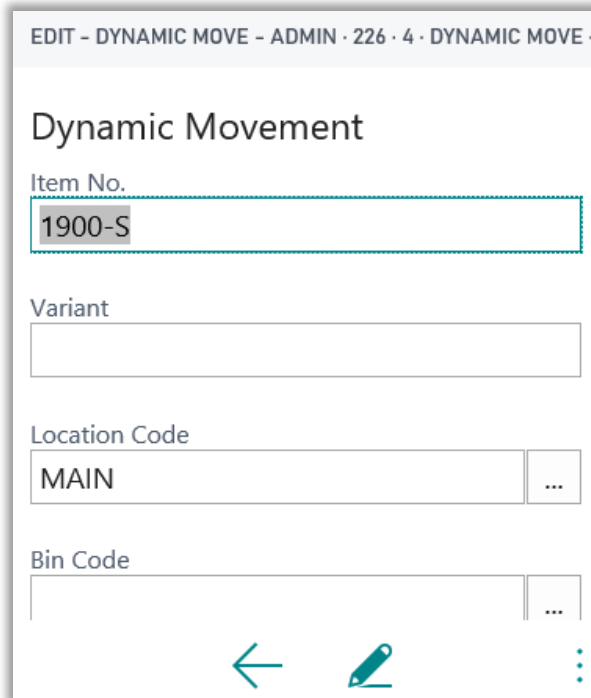
DYNAMIC INVENTORY MOVEMENT & INVENTORY LOOKUPS

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.



The screenshot shows the 'Dynamic Movement' form in the Dynamics 365 Business Central mobile app. The form is titled 'Dynamic Movement' and includes the following fields:

- Item No.: 1900-S
- Variant: (empty)
- Location Code: MAIN
- Bin Code: (empty)

At the bottom of the form, there are navigation icons: a back arrow, a pencil icon, and a vertical ellipsis.

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

Dynamic Movement

Item No.

Variant

Location Code
 ...

Bin Code
 ...

New Location Code
 ...

New Bin
 ...


Quantity


Unit of Measure Code
 ...


6. Select "Post" under actions to post the inventory movement.


EDIT - DYNAMIC MOVE - ADMIN · 226 · 4 · DYNAMIC MOVE · 0

Process

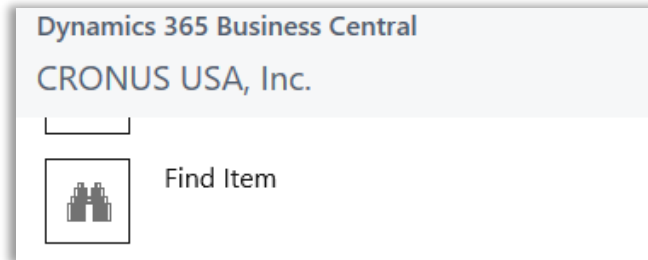
 Post

 Picture

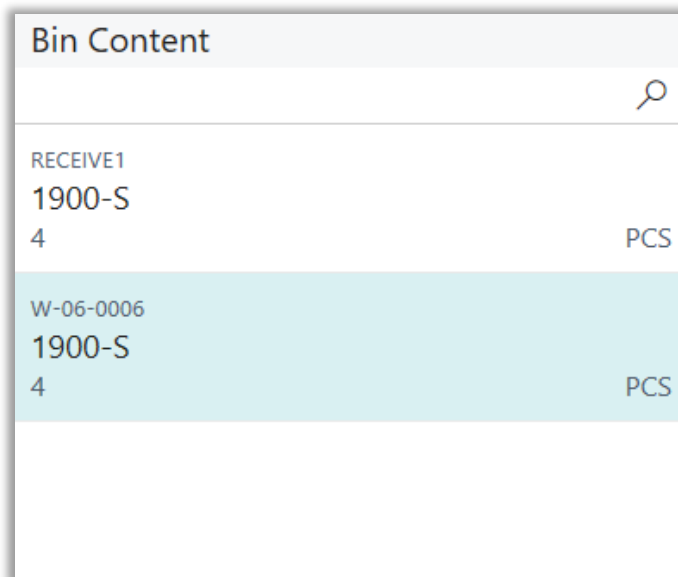
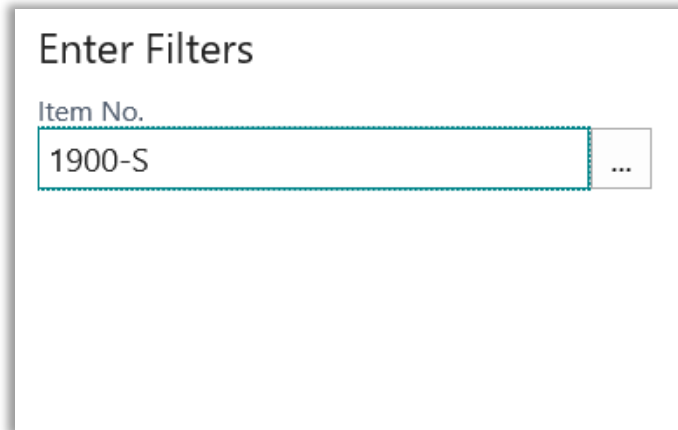
 Bin List

 Reset

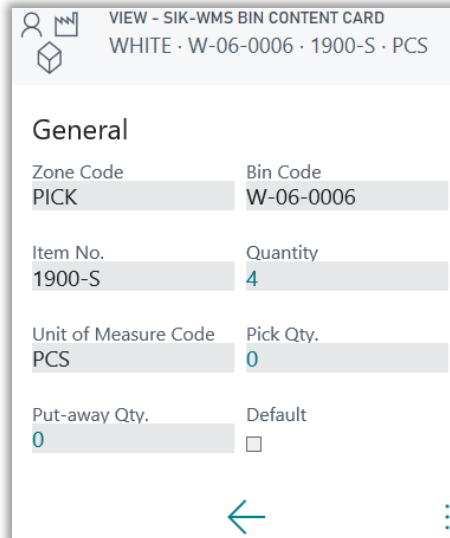
7. To view the inventory movement recently created, back on the main menu actions, navigate to “Find Item”.



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:




VIEW - SIK-WMS BIN CONTENT CARD
WHITE · W-06-0006 · 1900-S · PCS

General

Zone Code PICK	Bin Code W-06-0006
Item No. 1900-S	Quantity 4
Unit of Measure Code PCS	Pick Qty. 0
Put-away Qty. 0	Default <input type="checkbox"/>

← ⋮

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

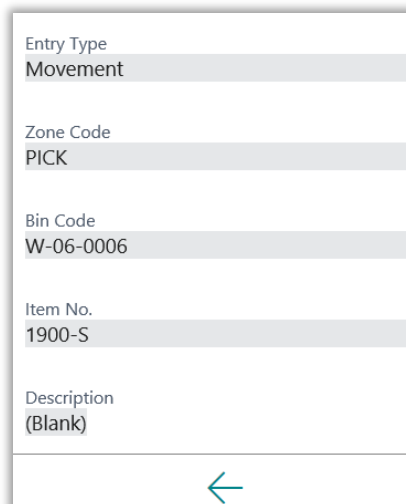


CRONUS USA, Inc.

Warehouse Entries

Quantity	Date	Item No.
4	4/8/2019	1900-S

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



Entry Type
Movement

Zone Code
PICK

Bin Code
W-06-0006

Item No.
1900-S

Description
(Blank)

←

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:

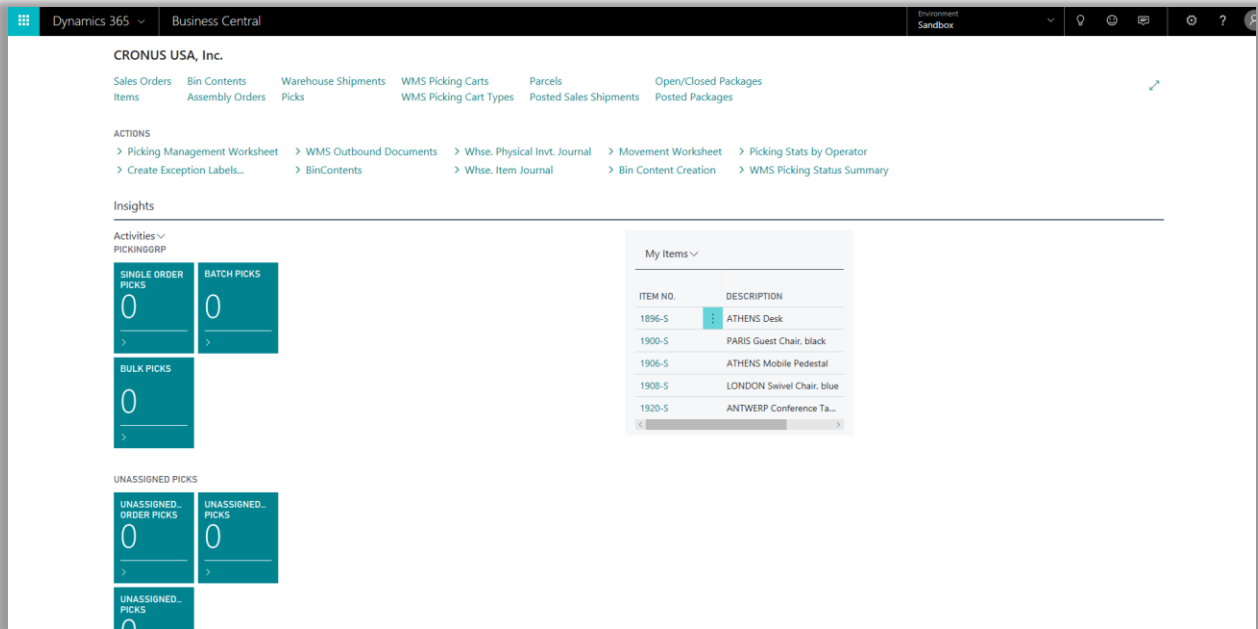
Batch picks are warehouse picks created and assigned to a WMS picking cart for fulfilling of outbound documents shipments in a batch method. When picks are created in the Picking Management Worksheet, they are assigned to a picking cart type, and parcelized into the parcel sizing assigned to the corresponding 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.



The screenshot displays the Dynamics 365 Business Central interface for the 'CRONUS USA, Inc.' company. The top navigation bar includes 'Dynamics 365' and 'Business Central'. The main area is divided into several sections:

- Navigation Bar:** Contains links for Sales Orders, Bin Contents, Warehouse Shipments, WMS Picking Carts, Parcels, and Open/Closed Packages. Sub-links include Items, Assembly Orders, Picks, WMS Picking Cart Types, Posted Sales Shipments, and Posted Packages.
- ACTIONS:** A list of actions including 'Picking Management Worksheet', 'WMS Outbound Documents', 'Whse. Physical Invt. Journal', 'Movement Worksheet', 'Picking Stats by Operator', 'Create Exception Labels...', 'BinContents', 'Whse. Item Journal', 'Bin Content Creation', and 'WMS Picking Status Summary'.
- Insights:** A section with a 'My Items' dropdown menu. Below it, there are four cards showing pick counts: 'SINGLE ORDER PICKS', 'BATCH PICKS', 'BULK PICKS', and 'UNASSIGNED PICKS'. Each card displays a large '0' and a right-pointing arrow.
- Table:** A table titled 'My Items' with columns 'ITEM NO.' and 'DESCRIPTION'. It lists several items:

ITEM NO.	DESCRIPTION
1896-S	ATHENS Desk
1900-S	PARIS Guest Chair, black
1906-S	ATHENS Mobile Pedestal
1908-S	LONDON Swivel Chair, blue
1920-S	ANTWERP Conference Ta...

WMS OUTBOUND DOCUMENTS:

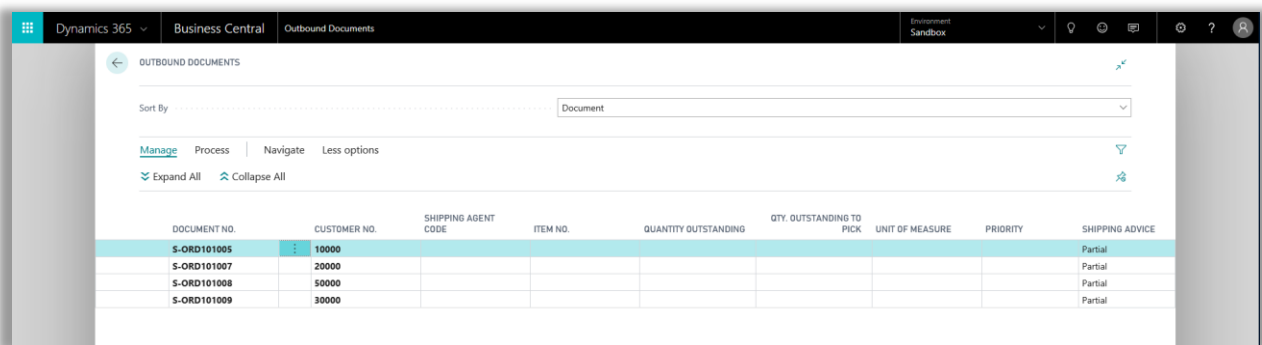
WMS Picking Management utilizes a WMS outbound documents page which feeds into the WMS picking management worksheet. WMS outbound documents can be sales orders ready to be picked, outbound transfer orders and purchase return orders.

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

WMS Outbound Documents List

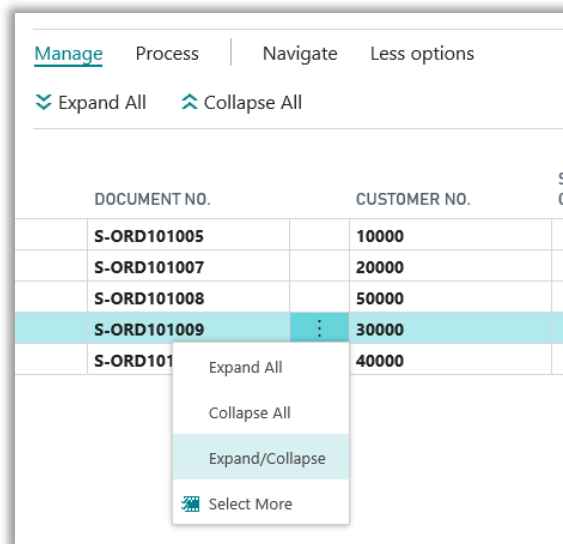
All outbound documents in need of warehouse processing will appear in the WMS Outbound Documents page. Upon opening the page, the field for “Sort by” will be filtered by Document No. This will display a line for each outbound document ready for warehouse processing. These may be Sales Orders, Outbound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



DOCUMENT NO.	CUSTOMER NO.	SHIPPING AGENT CODE	ITEM NO.	QUANTITY OUTSTANDING	QTY. OUTSTANDING TO PICK	UNIT OF MEASURE	PRIORITY	SHIPPING ADVICE
S-ORD101005	10000							Partial
S-ORD101007	20000							Partial
S-ORD101008	50000							Partial
S-ORD101009	30000							Partial

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



DOCUMENT NO.	CUSTOMER NO.	SHIPPING AGENT CODE
S-ORD101005	10000	
S-ORD101007	20000	
S-ORD101008	50000	
S-ORD101009	30000	
S-ORD101009	40000	

Manage Process Navigate Less options									
Expand All Collapse All									
DOCUMENT NO.	CUSTOMER NO.	SHIPPING AGENT CODE	ITEM NO.	QUANTITY OUTSTANDING	QTY. OUTSTANDING TO PICK	UNIT OF MEASURE	PRIORITY	SHIPPING ADV	
S-ORD101005	10000							Partial	
S-ORD101007	20000							Partial	
S-ORD101008	50000							Partial	
S-ORD101009	30000							Partial	
S-ORD101009	30000		1001	2	2	PCS			
S-ORD101009	30000		1000	1	1	PCS			
S-ORD101010	40000							Partial	

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.

Manage Process Navigate Less options			
Show Document			
DOCUMENT NO.	CUSTOMER NO.	SH	CO
S-ORD101005	10000		
S-ORD101007	20000		
S-ORD101008	50000		
S-ORD101009	30000		
S-ORD101009	30000		
S-ORD101009	30000		
S-ORD101010	40000		

SALES ORDER

S-ORD101009 · School of Fine Art

[Process](#) | [Report](#) | [Release](#) | [Posting](#) | [Order](#) | [Request Approval](#) | [Actions](#) | [Navigate](#)

General

Customer Name

School of Fine Art

Due Date

Contact

Meagan Bond

Requested Delivery D

Posting Date

4/8/2019

External Document N

Order Date

4/8/2019

Lines

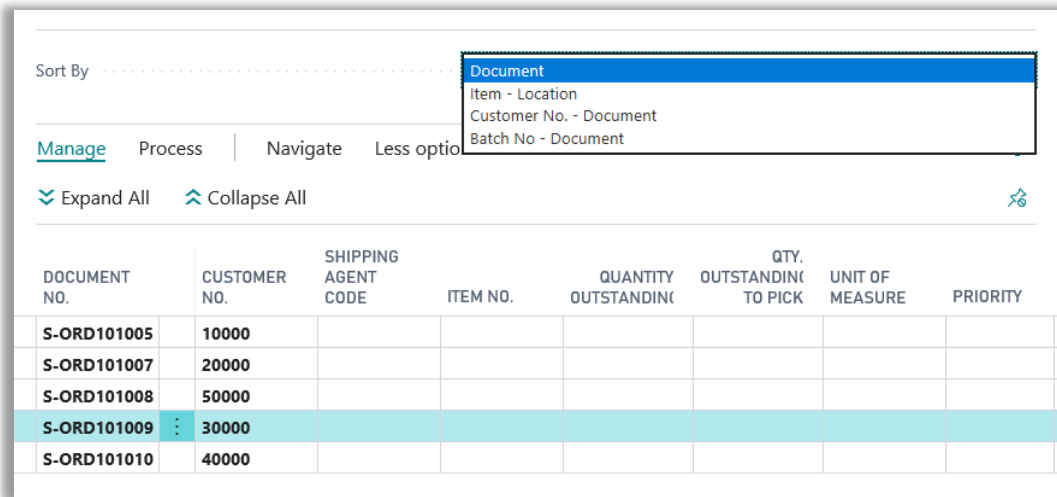
Manage

More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Item	1001	90 degree elbo	MAIN	2
Item	1000	Bike	MAIN	1

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

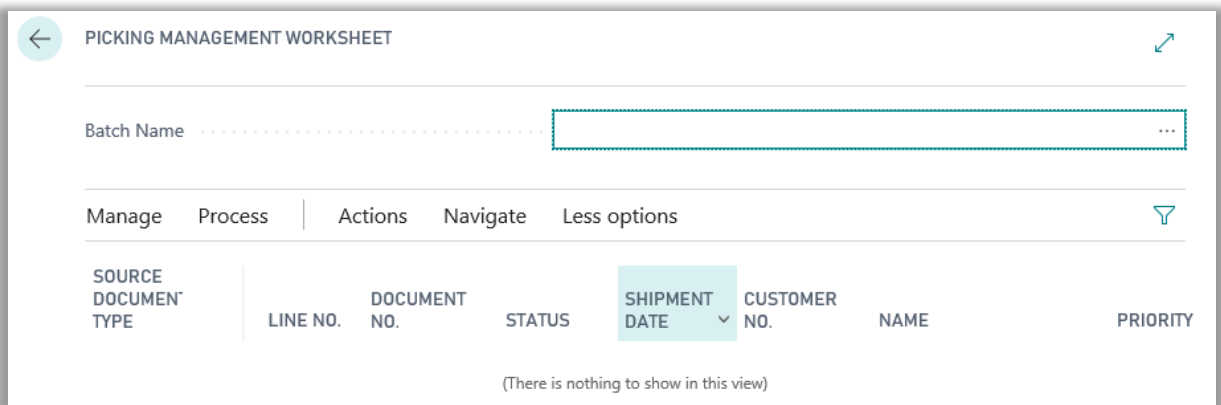
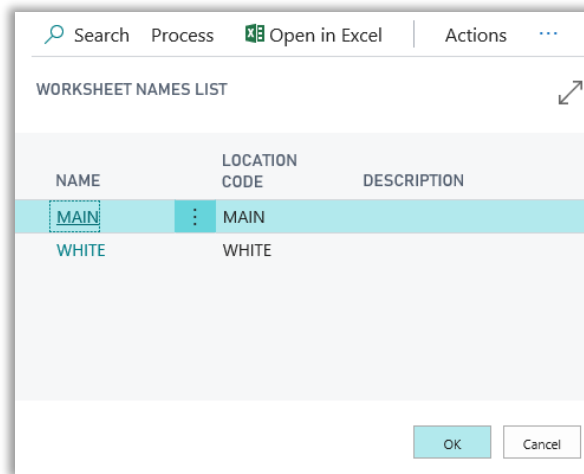
The picking management worksheet is a tool which interacts with the WMS outbound documents screen allowing's warehouse employees to grab multiple outbound documents at a time and generate warehouse picks based upon what is brought into the picking management worksheet.

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.

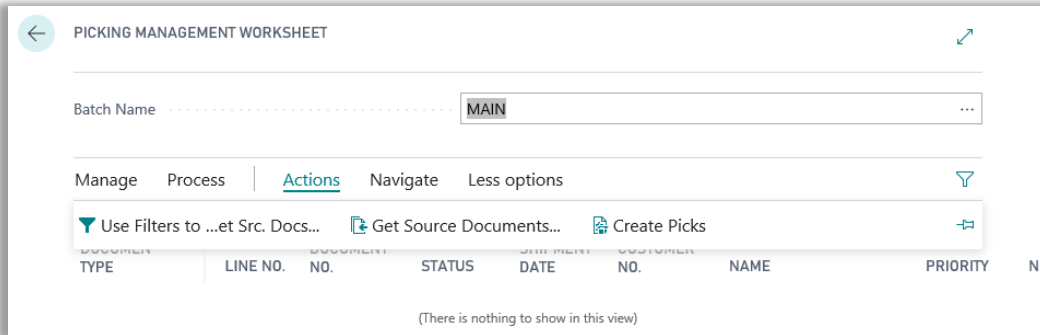



NAME	LOCATION CODE	DESCRIPTION
MAIN	MAIN	WHITE
WHITE	WHITE	

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.



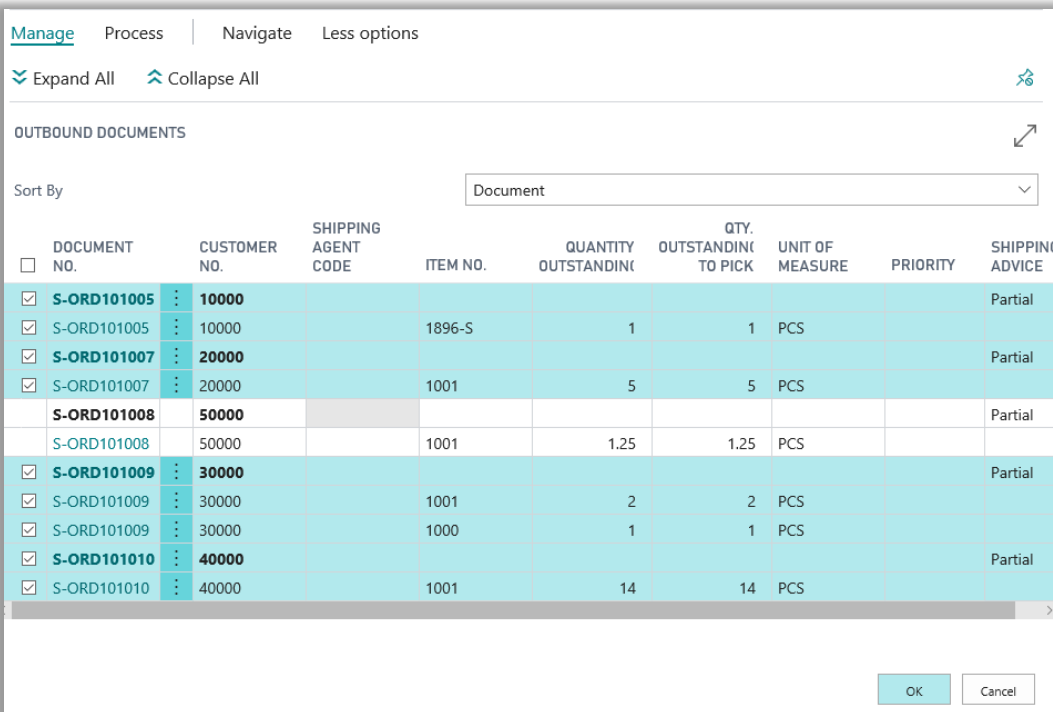
The screenshot shows the 'PICKING MANAGEMENT WORKSHEET' ribbon. The 'Batch Name' field is set to 'MAIN'. The ribbon has tabs for 'Manage', 'Process', 'Actions', 'Navigate', and 'Less options'. The 'Actions' tab is active, showing three actions: 'Use Filters to ...et Src. Docs...', 'Get Source Documents...', and 'Create Picks'. Below the ribbon, a table header is visible with columns: TYPE, LINE NO., NO., STATUS, DATE, NO., NAME, PRIORITY, and NO. A message at the bottom states: '(There is nothing to show in this view)'.

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



The screenshot shows the 'WMS Outbound Document Page'. The ribbon has tabs for 'Manage', 'Process', 'Navigate', and 'Less options'. The 'Manage' tab is active, showing 'Expand All' and 'Collapse All' buttons. Below the ribbon, the section 'OUTBOUND DOCUMENTS' is displayed. A 'Sort By' dropdown menu is set to 'Document'. A table of documents is shown with columns: DOCUMENT NO., CUSTOMER NO., SHIPPING AGENT CODE, ITEM NO., QUANTITY OUTSTANDING, QTY. OUTSTANDING TO PICK, UNIT OF MEASURE, PRIORITY, and SHIPPING ADVICE. The table contains 10 rows of data, with the first 10 rows highlighted in blue. The 'SHIPPING ADVICE' column shows 'Partial' for all rows. At the bottom right, there are 'OK' and 'Cancel' buttons.

DOCUMENT NO.	CUSTOMER NO.	SHIPPING AGENT CODE	ITEM NO.	QUANTITY OUTSTANDING	QTY. OUTSTANDING TO PICK	UNIT OF MEASURE	PRIORITY	SHIPPING ADVICE
<input checked="" type="checkbox"/> S-ORD101005	10000							Partial
<input checked="" type="checkbox"/> S-ORD101005	10000		1896-S	1	1	PCS		Partial
<input checked="" type="checkbox"/> S-ORD101007	20000							Partial
<input checked="" type="checkbox"/> S-ORD101007	20000		1001	5	5	PCS		Partial
<input type="checkbox"/> S-ORD101008	50000							Partial
<input type="checkbox"/> S-ORD101008	50000		1001	1.25	1.25	PCS		Partial
<input checked="" type="checkbox"/> S-ORD101009	30000							Partial
<input checked="" type="checkbox"/> S-ORD101009	30000		1001	2	2	PCS		Partial
<input checked="" type="checkbox"/> S-ORD101009	30000		1000	1	1	PCS		Partial
<input checked="" type="checkbox"/> S-ORD101010	40000							Partial
<input checked="" type="checkbox"/> S-ORD101010	40000		1001	14	14	PCS		Partial

PICKING MANAGEMENT WORKSHEET

Batch Name: MAIN

Manage Process Actions Navigate Less options

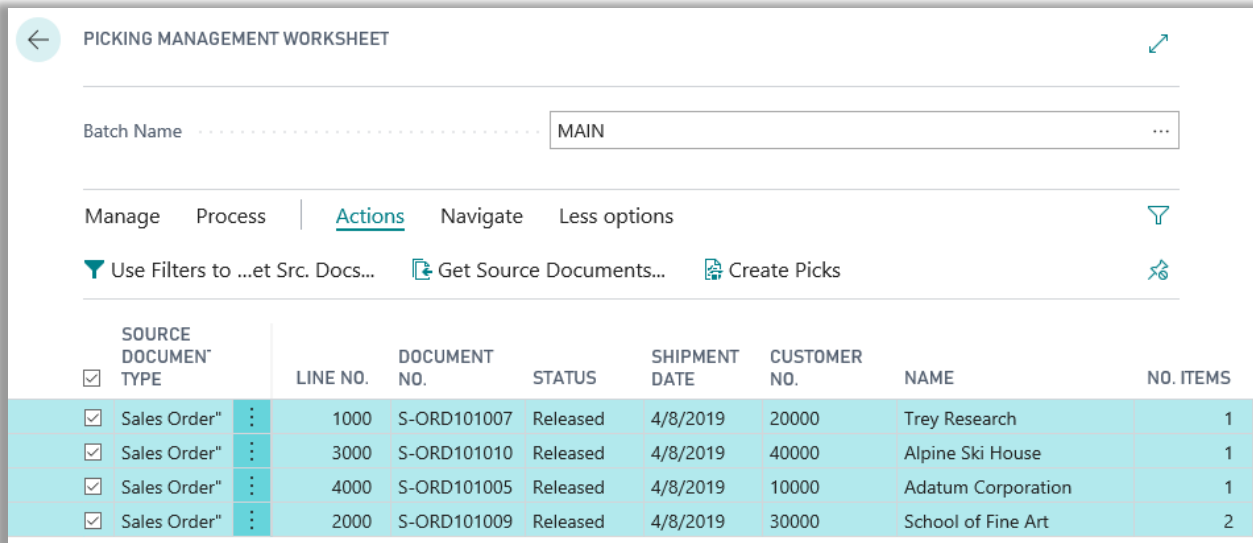
SOURCE DOCUMENT TYPE	DOCUMENT NO.	STATUS	SHIPMENT DATE	CUSTOMER NO.	NAME	NO. ITEMS	SHIPPING AGENT CODE	SHIPPING ADVISE	ERROR MESSAGE	ITEM NO. 1	QTY 1	DEFAULT BIN 1	ITEM NO. 2	QTY 2
Sales Order*	S-ORD101007	Released	4/8/2019	20000	Trey Research	1		Partial		1001	5.00			
Sales Order*	S-ORD101010	Released	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

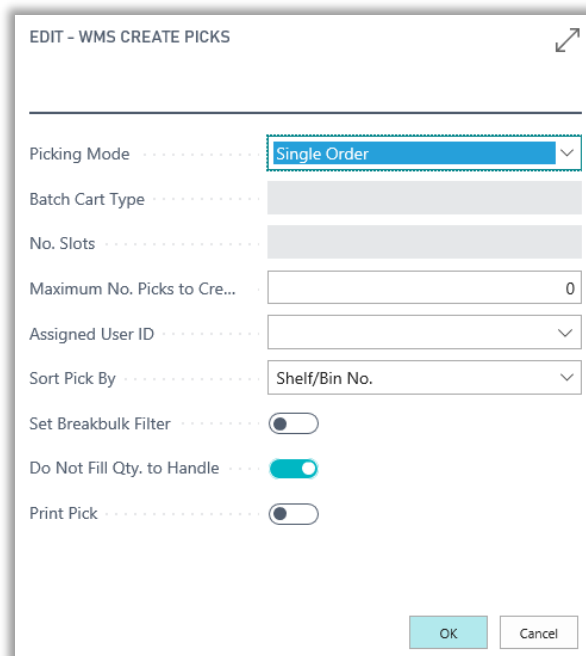
Once orders have been reviewed in the picking management worksheet, it is time to create the warehouse picks.

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”



<input checked="" type="checkbox"/>	SOURCE DOCUMENT TYPE	LINE NO.	DOCUMENT NO.	STATUS	SHIPMENT DATE	CUSTOMER NO.	NAME	NO. ITEMS
<input checked="" type="checkbox"/>	Sales Order"	1000	S-ORD101007	Released	4/8/2019	20000	Trey Research	1
<input checked="" type="checkbox"/>	Sales Order"	3000	S-ORD101010	Released	4/8/2019	40000	Alpine Ski House	1
<input checked="" type="checkbox"/>	Sales Order"	4000	S-ORD101005	Released	4/8/2019	10000	Adatum Corporation	1
<input checked="" type="checkbox"/>	Sales Order"	2000	S-ORD101009	Released	4/8/2019	30000	School of Fine Art	2

2. On the request page, complete the prompts:



EDIT - WMS CREATE PICKS

Picking Mode: Single Order

Batch Cart Type:

No. Slots:

Maximum No. Picks to Cre...: 0

Assigned User ID:

Sort Pick By: Shelf/Bin No.

Set Breakbulk Filter: ☐

Do Not Fill Qty. to Handle: ☒

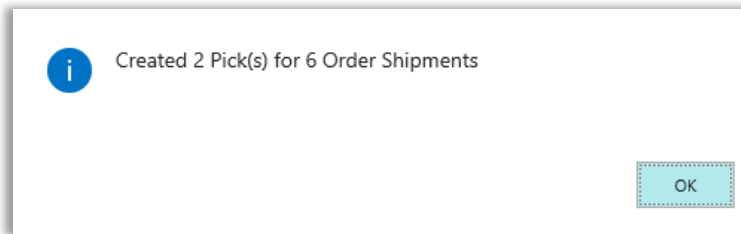
Print Pick: ☐

OK Cancel

- 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:

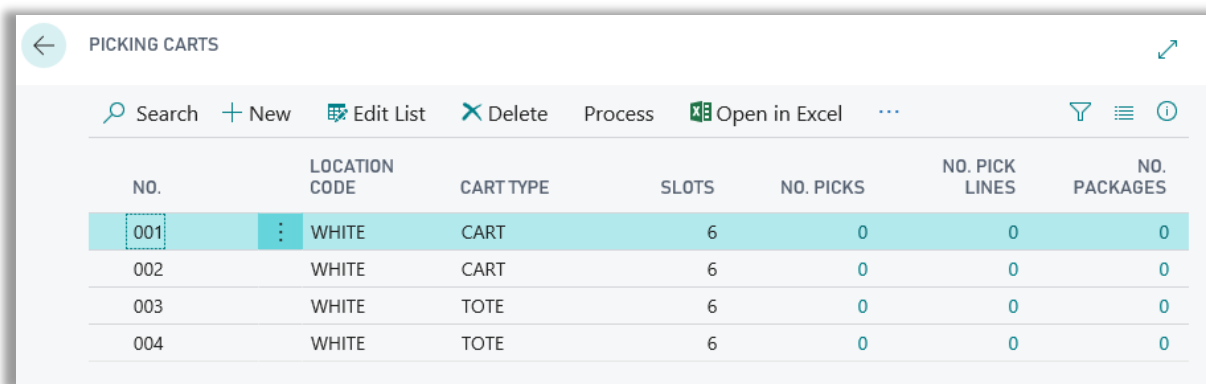
PICKING MANAGEMENT WORKSHEET								
Batch Name		MAIN						
Manage	Process	Actions	Navigate	Less options				
Use Filters to ...et Src. Docs...		Get Source Documents...		Create Picks				
SOURCE DOCUMENT TYPE	SHIPPING AGENT CODE	SHIPPING ADVICE	ERROR MESSAGE	ITEM NO. 1	QTY 1	DEFAULT BIN 1	ITEM NO. 2	
Sales 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.

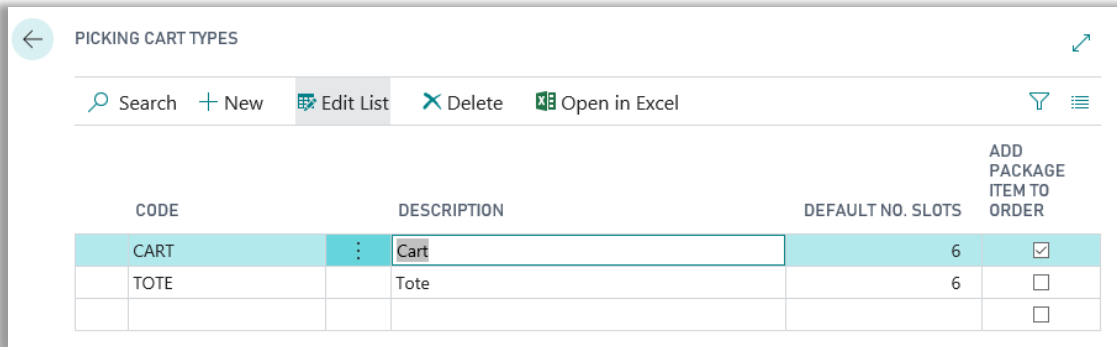
No. Picks: This is a lookup of all the picks currently on the cart

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.



CODE	DESCRIPTION	DEFAULT NO. SLOTS	ADD PACKAGE ITEM TO ORDER
CART	Cart	6	<input checked="" type="checkbox"/>
TOTE	Tote	6	<input type="checkbox"/>
			<input type="checkbox"/>

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.

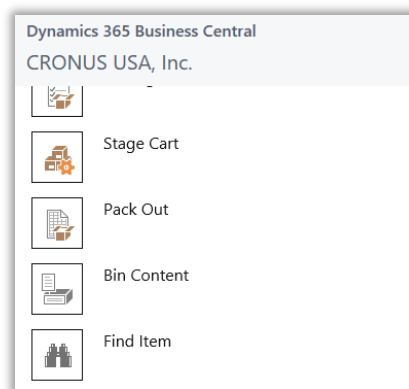
STAGING CARTS

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

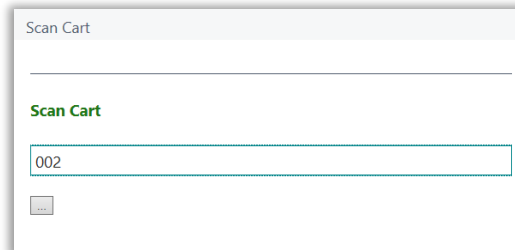
Inducting Picks to Cart

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”



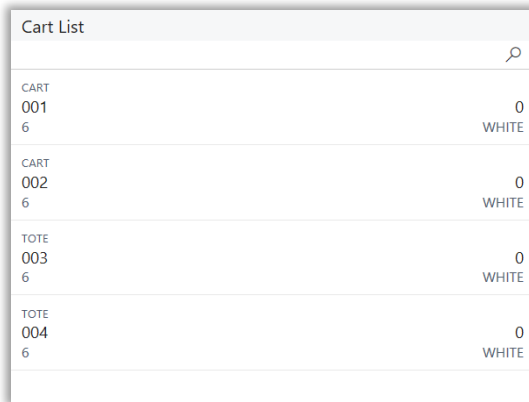
2. Select the picking cart by scanning OR selecting the ellipsis to lookup.



Scan Cart

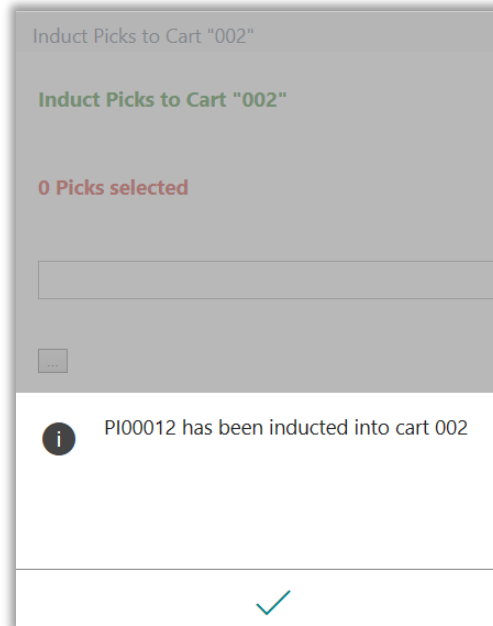
Scan Cart

002

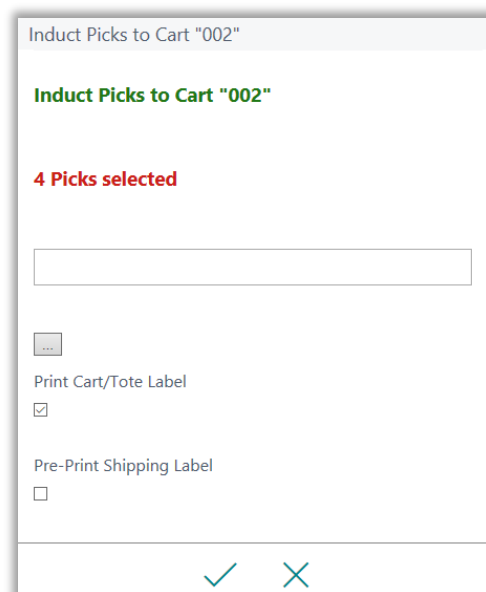


CART		
001	6	0 WHITE
002	6	0 WHITE
003	6	0 WHITE
004	6	0 WHITE

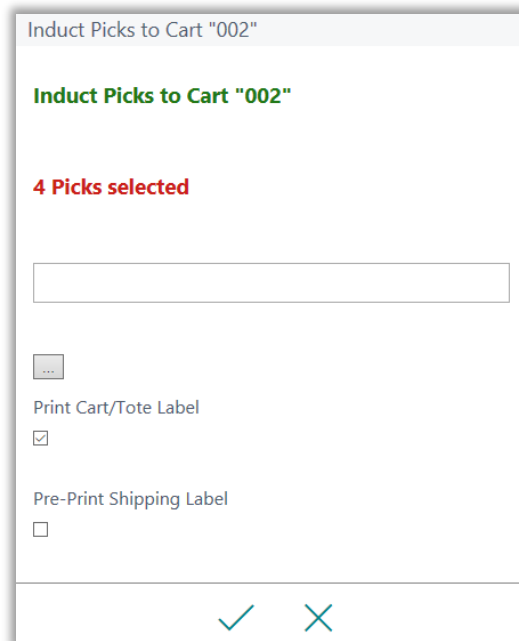
- Upon selecting picks to a cart, the only picks visible to be selected are the picks tied to the WMS Cart Type of the corresponding picking cart. This limits the lookup and will display the picks in the order they were created, which should be fulfilled by the cart type. Clicking the ellipsis will show 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:



Induct Picks to Cart "002"

Induct Picks to Cart "002"

4 Picks selected

Print Cart/Tote Label
☒

Pre-Print Shipping Label
☐




✓ ✕

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

Cart No. 002 Slot 1
Package No. 1 of 2  P01228
Order No.  1222
Box No.  BOX-SMALL
9:17:11 AM 8/28/2017

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)

PICKING MANAGEMENT WORKSHEET

Batch Name: WHITE

Manage Process **Actions** Navigate Less options

Use Filters to ...et Src. Docs... Get Source Documents... Create Picks

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
<input checked="" type="checkbox"/> Sales Order	1000	S-ORD101011	Released	4/8/2019	10000	Adatum Corporation	1		Partial		1001
<input checked="" type="checkbox"/> Sales Order	2000	S-ORD101012	Released	4/8/2019	20000	Trey Research	1		Partial		1001
<input checked="" type="checkbox"/> Sales Order	3000	S-ORD101013	Released	4/8/2019	30000	School of Fine Art	1		Partial		1001

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

EDIT - WMS CREATE PICKS

Picking Mode: Batch

Batch Cart Type: CART

No. Slots: 6

Maximum No. Picks to Create: 0

Assigned User ID:

Sort Pick By: Shelf/Bin No.

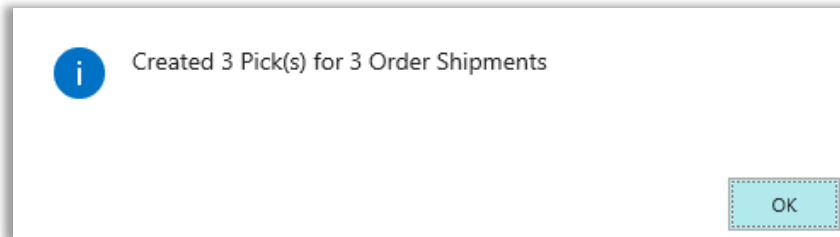
Set Breakbulk Filter: ☐

Do Not Fill Qty. to Handle: ☒

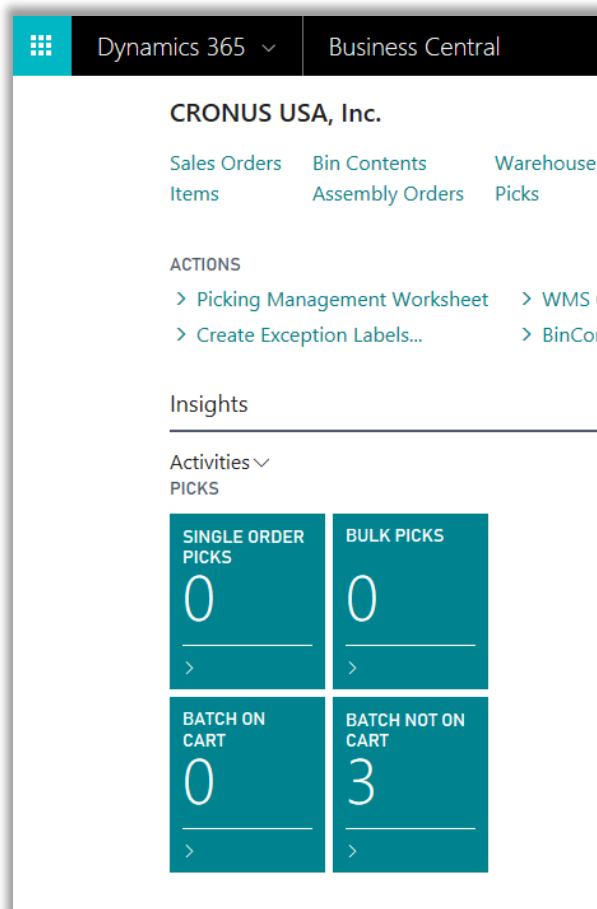
Print Pick: ☐

OK Cancel

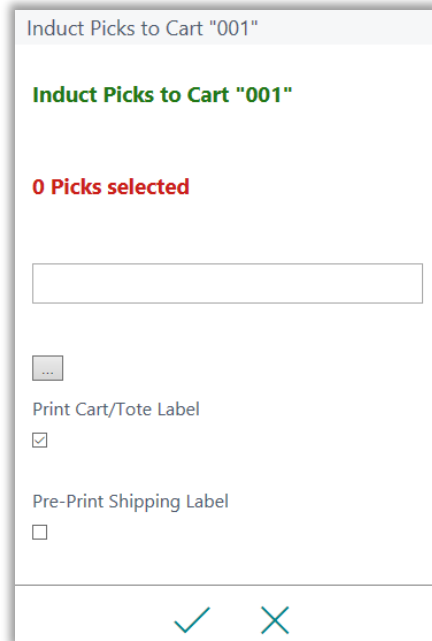
- a. If inventory exists for the item, 3 of 3 picks will be created



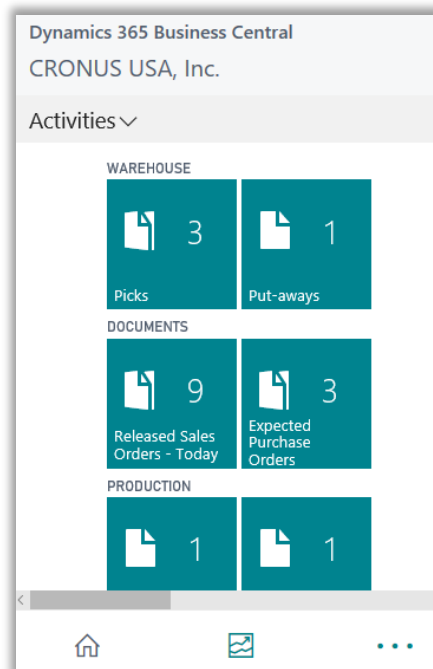
- b. Notice how after the picks are generated, the picks will fall off the WMS Picking Management worksheet.
3. The WMS Data Collection – Manager role center will show 3 batch picks not yet put on a cart



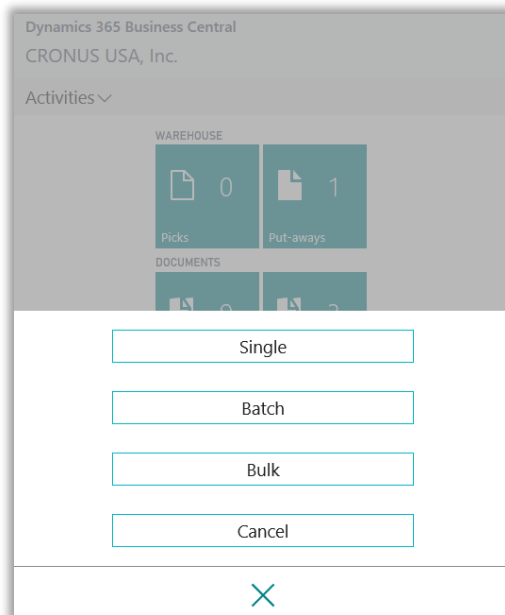
4. The next step is to begin staging the cart.
 - a. On the WMS Operator role, Navigate to “Stage Cart” and stage a cart with the 3 picks generated:
 - b. Continue until all 3 picks are in the cart. For more information on staging carts, see section “Staging Carts”



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.

Pick List		
PI00023	PICKPATCH00037	
SO S-ORD101007		4/8/2019
PI00024	PICKPATCH00037	
SO S-ORD101008		4/8/2019
PI00025	PICKPATCH00037	
SO S-ORD101010		4/8/2019
PI00029	PICKPATCH00037	
SO S-ORD101009		4/8/2019
PI00030	SO S-ORD101011 S-ORD101012 S-ORD101013	4/8/2019




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)

Sales Order:
S-ORD101011|S-ORD101012|S-ORD101013,
12 Lines

Scan Item (1001)

Pick Line Detail Show as list

PCS	
1001	90 degree elbo
W-06-0006	3.00




- a. Scan Bin:

Sales Order:
S-ORD101011|S-ORD101012|S-ORD101013,
12 Lines

Scan Bin (W-06-0006)

Pick Line Detail Show as list

PCS	
1001	90 degree elbo
W-06-0006	3.00

b. Scan Item:

Sales Order:
S-ORD101011|S-ORD101012|S-ORD101013,
12 Lines

Scan Item (1001)

1001

...

Pick Line Detail Show as list

PCS	
1001	90 degree elbo
W-06-0006	3.00

✎ ✕ ⋮

- 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.

Sales Order:
S-ORD101011|S-ORD101012|S-ORD101013,
12 Lines

Enter Qty to Handle (3 PCS)

3

...

Pick Line Detail Show as list

PCS	
1001	90 degree elbo
W-06-0006	3.00

✎ ✕ ⋮

- 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




Last Record Saved

Place 1 PCS in Pkg PKG0000042

Pick Line Detail


Show as list

PCS		
1001	90 degree elbo	
001		1.00

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"

Last Record Saved



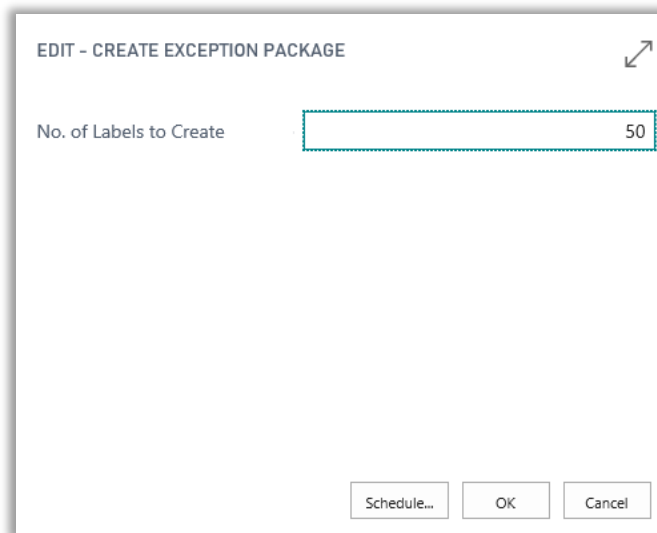
Post

EXCEPTION HANDLING

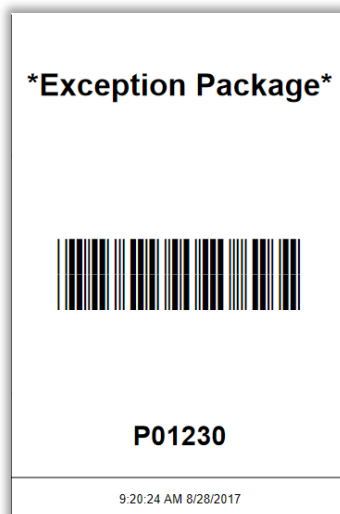
To account for scenarios in the picking process which do not conform with the configuration, an exception handling process is in place. This process involves placing items picked into an exception package which will be scanned from pre-created package labels.

Creating Exception Labels:

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



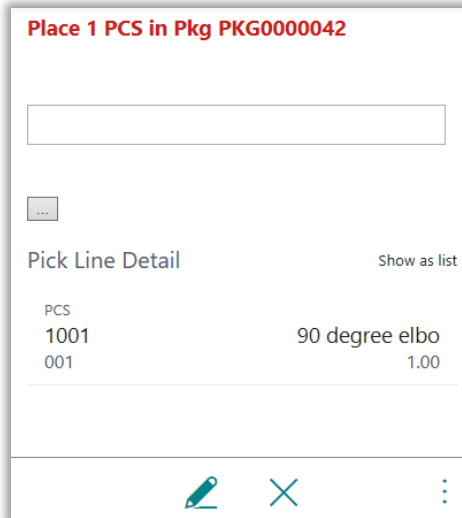
2. After the creation of each WMS Exception Label, an exception label will print:



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.



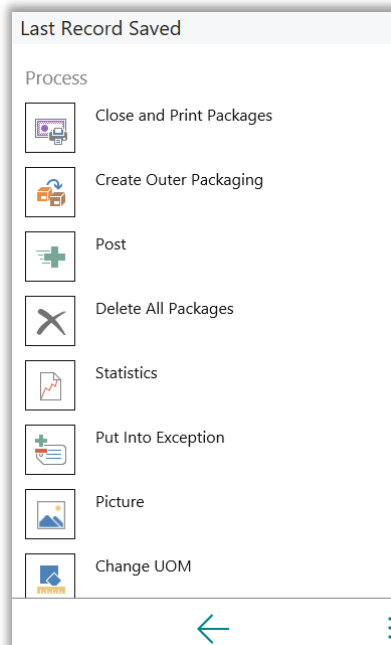
Place 1 PCS in Pkg PKG0000042

...

Pick Line Detail Show as list

PCS	
1001	90 degree elbo
001	1.00

Navigation icons: Pencil, Cross, Vertical Ellipsis



Last Record Saved

Process


- Close and Print Packages
- Create Outer Packaging
- Post
- Delete All Packages
- Statistics
- Put Into Exception
- Picture
- Change UOM

Navigation icons: Left Arrow, Vertical Ellipsis

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

Sales Order:
S-ORD101011|S-ORD101012|S-ORD101013
6 Lines




Scan Exception Package No.



Pick Line Detail

Show as list

PCS	
1001	90 degree elbo
001	1.00



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.

← 1001 · 90 DEGREE ELBO ↗

Item Units of Measure

Search + New Edit List Delete Open in Excel

CODE	QTY. PER UNIT OF MEASURE	GROSS WEIGHT	WMS HANDLING UNIT	PACKED IN OWN BOX	PRI... INBO ITEM LABE	WEIGHT	LENGTH
BOX	100	0	BOX	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	5
PALLET	500	0	PALLET	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50	48
PCS	1	0	PCS	<input type="checkbox"/>	<input type="checkbox"/>	0.1	1
				<input type="checkbox"/>	<input type="checkbox"/>		

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”.

Search + New Edit List Delete Open in Excel

SELECT - WMS HANDLING UNIT + New ↗

CODE	DESCRIPTION	TARE WEIGHT	AU... CALC GROS WEIG	AU... CRE# PACK	AU... CRE# PLAT RCPT	PRI... INBO ITEM LABE	SMALL PARCEL (UPS/FEDE	LENGTH	WIDTH
BAR	Bar	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No	0.00	0.00
BOX	Box	0.15	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Small Parcel	15.00	12.00
BOX-LARGE	Box-Large	0.15	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Small Parcel	20.00	15.75
BOX-MEDIUM	Box-Medium	0.15	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Small Parcel	15.00	12.00

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.

Lines		Manage	More options				
TYPE	NO.	DESCRIPTION			LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE
Item	1001	90 degree elbo			WHITE	500	PCS

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:

Sales Order: S-ORD101014, 2 Lines
Scan Bin (W-06-0006)

Pick Line Detail Show as list

PCS

1001

W-06-0006

90 degree elbo

500.00

Scan Item:

Sales Order: S-ORD101014, 2 Lines
Scan Item (1001)

Pick Line Detail Show as list

PCS

1001

W-06-0006

90 degree elbo

500.00

Scan Qty:

Sales Order: S-ORD101014, 2 Lines

Enter Qty to Handle (500 PCS)

500

...

Pick Line Detail
Show as list

PCS		
1001	90 degree elbo	
W-06-0006		500.00

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.

Last Record Saved

Place 1 BOX in Slot 1, Pkg PKG0000097

...

Pick Line Detail
Show as list

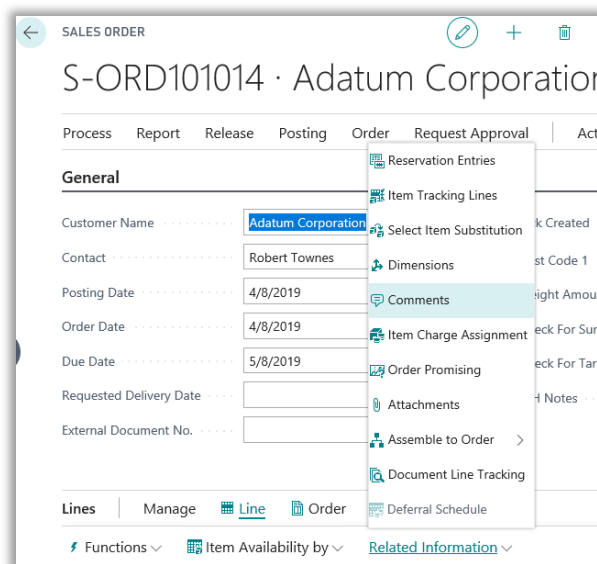
BOX		
1001	90 degree elbo	
001		1.00

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:



SALES ORDER

S-ORD101014 · Adatum Corporation

Process Report Release Posting Order Request Approval Act

General

Customer Name Adatum Corporation

Contact Robert Townes

Posting Date 4/8/2019

Order Date 4/8/2019

Due Date 5/8/2019

Requested Delivery Date

External Document No.

Reservation Entries

Item Tracking Lines

Select Item Substitution

Dimensions

Comments

Item Charge Assignment

Order Promising

Attachments

Assemble to Order >

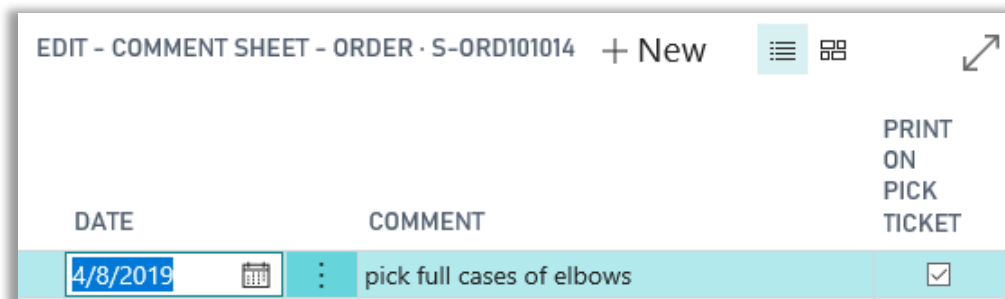
Document Line Tracking

Deferral Schedule

Lines | Manage | Line | Order

Functions ▾ Item Availability by ▾ Related Information ▾

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



EDIT - COMMENT SHEET - ORDER · S-ORD101014 + New

PRINT ON PICK TICKET

DATE	COMMENT	PRINT ON PICK TICKET
4/8/2019	pick full cases of elbows	<input checked="" type="checkbox"/>

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:

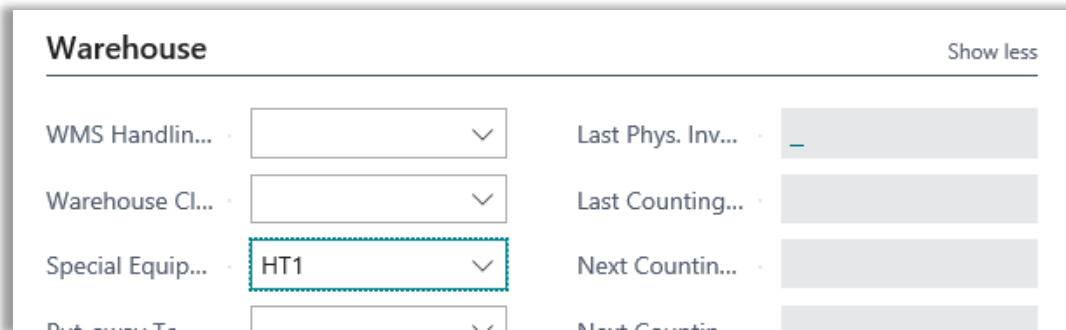
SIK-WMS Pick Line Comments	
	
S-ORD101014	
1001	500
pick full cases of elbows	

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

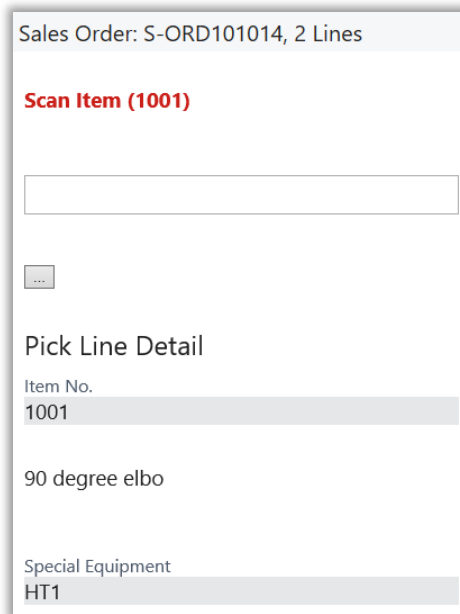
If special equipment is required to handle an item, the special equipment code will show on the pick line detail as it appears to users.

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



Warehouse		Show less	
WMS Handlin...	<input type="text"/>	Last Phys. Inv...	<input type="text"/>
Warehouse Cl...	<input type="text"/>	Last Counting...	<input type="text"/>
Special Equip...	HT1	Next Countin...	<input type="text"/>
Put-away To	<input type="text"/>	Next Countin...	<input type="text"/>

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



Sales Order: S-ORD101014, 2 Lines

Scan Item (1001)

...

Pick Line Detail

Item No.
1001

90 degree elbo

Special Equipment
HT1

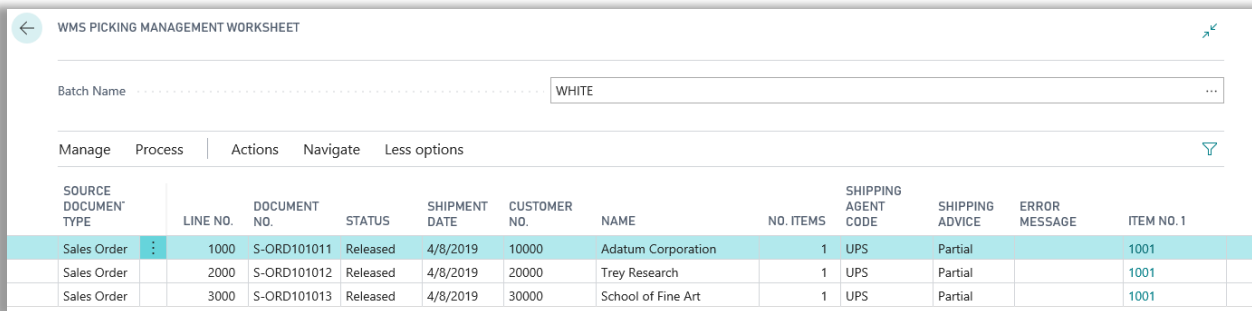
BULK PICKING

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.



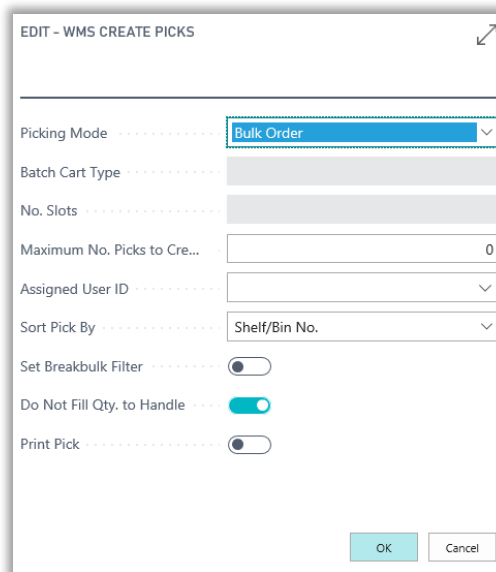
WMS PICKING MANAGEMENT WORKSHEET

Batch Name: WHITE

Manage Process Actions Navigate Less options

SOURCE DOCUMENT TYPE	LINE NO.	DOCUMENT NO.	STATUS	SHIPMENT DATE	CUSTOMER NO.	NAME	NO. ITEMS	SHIPPING AGENT CODE	SHIPPING ADVISE	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, each item no. is 1001
2. Highlight the rows and Select "Create Picks"



EDIT - WMS CREATE PICKS

Picking Mode: Bulk Order

Batch Cart Type:

No. Slots:

Maximum No. Picks to Create: 0

Assigned User ID:

Sort Pick By: Shelf/Bin No.

Set Breakbulk Filter: ☐

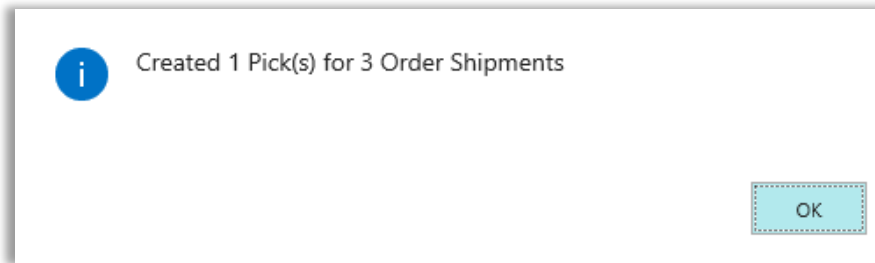
Do Not Fill Qty. to Handle: ☒

Print Pick: ☐

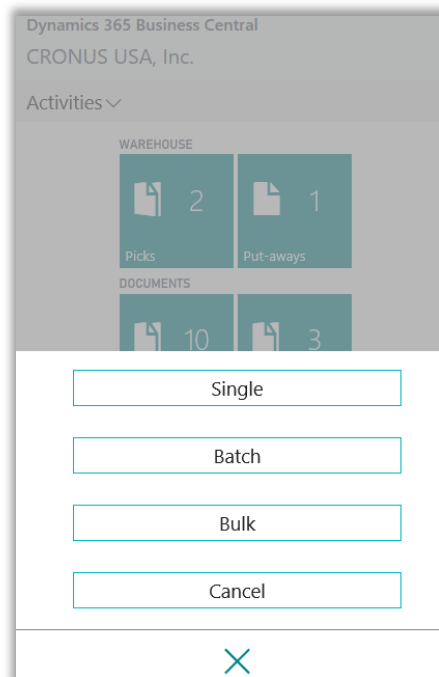
OK Cancel

- 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

Sales Order:
S-ORD101011|S-ORD101012|S-ORD101013, 6
Lines

Scan Bin (W-06-0006)

Pick Line Detail Show as list

PCS	
1001	90 degree elbo
W-06-0006	3.00




Scan Item

Sales Order:
S-ORD101011|S-ORD101012|S-ORD101013, 6
Lines

Scan Item (1001)

Pick Line Detail Show as list


PCS	
1001	90 degree elbo
W-06-0006	3.00

Enter Quantity to Handle




Sales Order:
S-ORD101011|S-ORD101012|S-ORD101013, 6
Lines

Enter Qty to Handle (3 PCS)



Pick Line Detail Show as list


PCS	
1001	90 degree elbo
W-06-0006	3.00

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

Sales Order:
S-ORD101011|S-ORD101012|S-ORD101013, 6
Lines

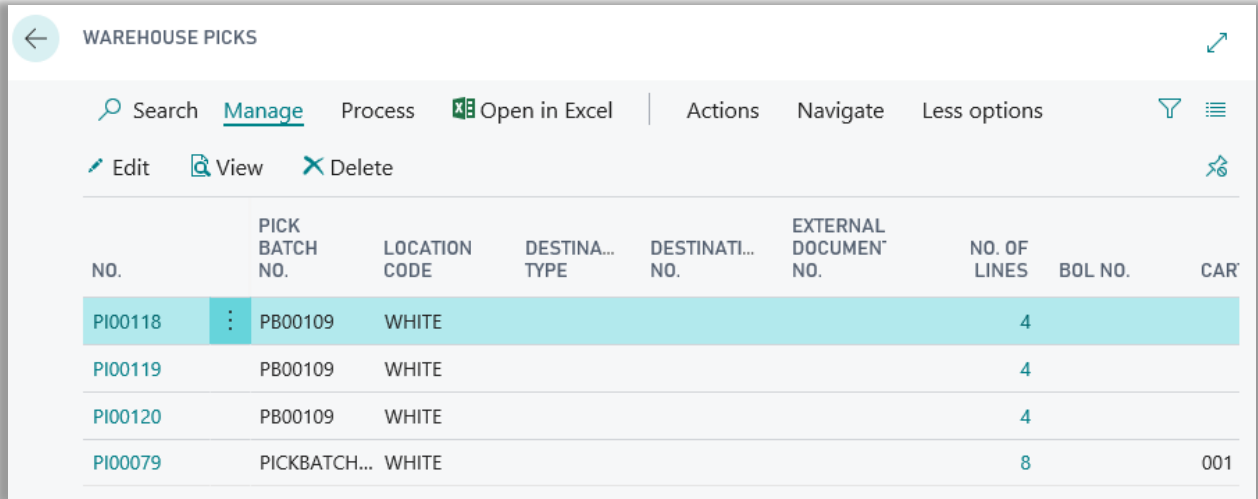
End of Document



PICK BATCHES

OVERVIEW

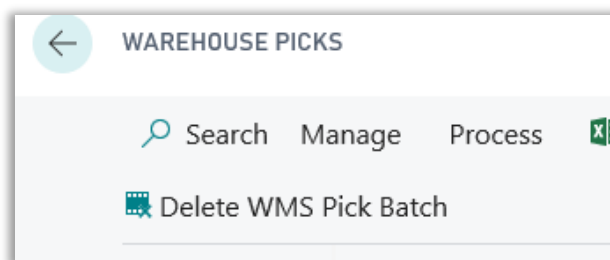
Picks are generated through the picking management worksheet with a unique Pick Batch No. The Pick Batch No. is a number which can be used to trace, as well as provide the ability to delete groups of picks when mistakes are made when generating picks. When creating picks, the pick inherits a batch no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



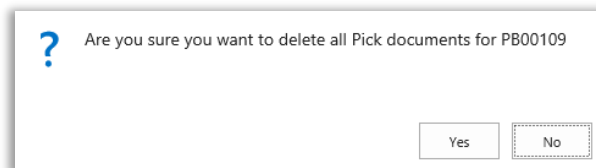
NO.	PICK BATCH NO.	LOCATION CODE	DESTINA... TYPE	DESTINATI... NO.	EXTERNAL DOCUMENT NO.	NO. OF LINES	BOL NO.	CAR
PI00118	PB00109	WHITE				4		
PI00119	PB00109	WHITE				4		
PI00120	PB00109	WHITE				4		
PI00079	PICKBATCH...	WHITE				8		001

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

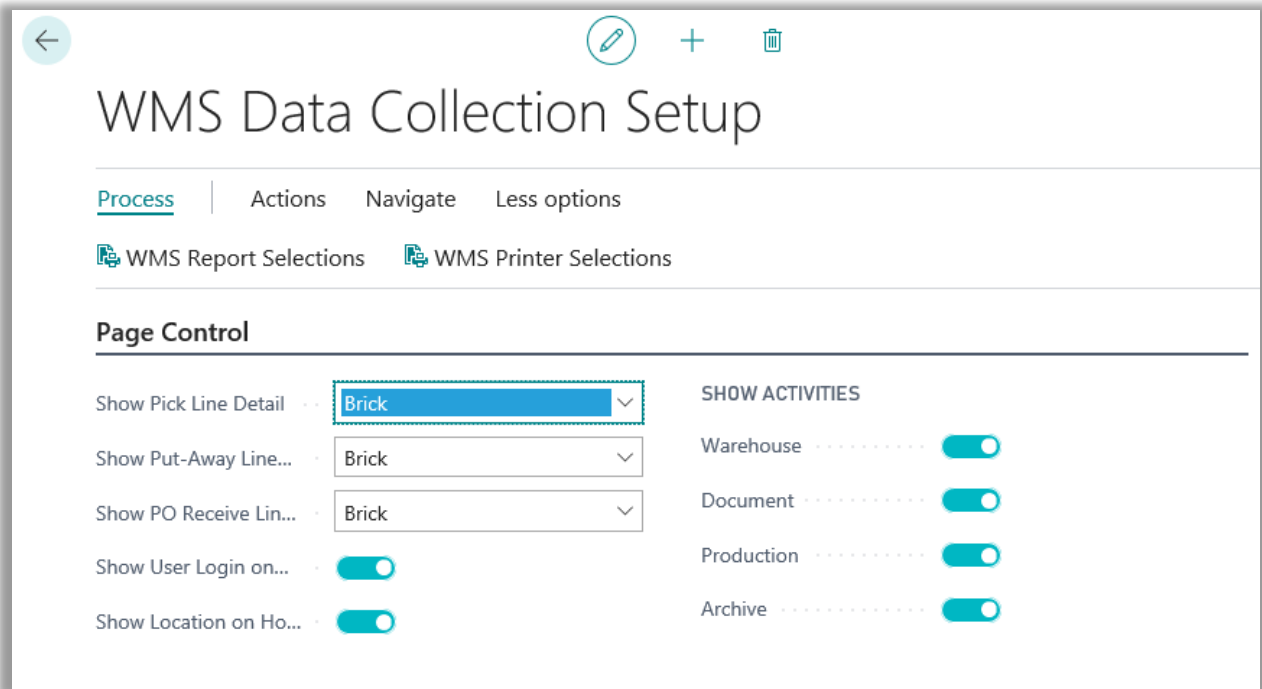

WAREHOUSE EMPLOYEES


 Search
  New
  Edit List
  Delete
  Open in Excel
 


USER ID	LOCATION CODE	DEFAULT	ADCS USER	DO NOT PRINT RCV LABEL
ADMIN ...	MAIN	<input checked="" type="checkbox"/>		<input type="checkbox"/>
ADMIN	WHITE	<input type="checkbox"/>		<input type="checkbox"/>
		<input type="checkbox"/>		<input type="checkbox"/>

WMS DATA COLLECTION SETUP:

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



WMS Data Collection Setup

Process | Actions | Navigate | Less options

WMS Report Selections WMS Printer Selections

Page Control

Show Pick Line Detail · Brick

Show Put-Away Line... · Brick

Show PO Receive Lin... · Brick

Show User Login on... · ☒

Show Location on Ho... · ☒

SHOW ACTIVITIES

Warehouse · ☒

Document · ☒

Production · ☒

Archive · ☒

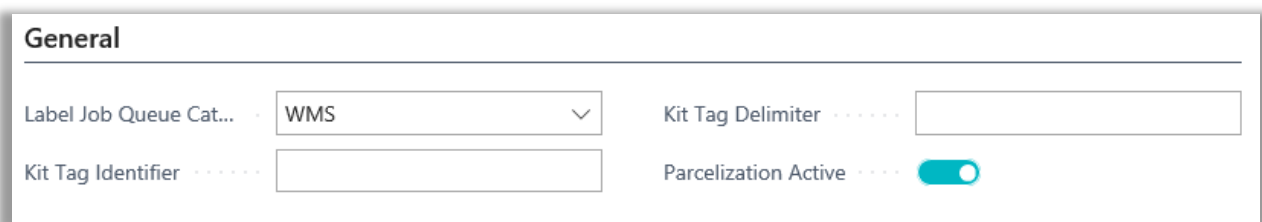
PAGE CONTROL (ABOVE)

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.



General

Label Job Queue Cat... · WMS

Kit Tag Identifier ·

Kit Tag Delimiter ·

Parcelization Active · ☒

WMS CYCLE COUNTS:

WMS Cycle Count

COUNTENABLED

Cycle Count Enabled

☒

Physical Inventory En...

☒

Phys. Inventory Journ...

PHYS. INVE

▼

Phys. Inventory Jnl Ba...

DEFAULT

▼

Whse. Phys. Inv Jnl Te...

PHYSICAL I

▼

Whse. Phys. Inv Jnl B...

DEFAULT

▼

Combine Same Bin/lt...

☒

FIELD PROMPT ORDER

Cycle Count Bin

1

Cycle Count Item No.

2

Cycle Count Variant...

Cycle Count Quantiy

3

Cycle Count Confirm...

Cycle Count Lot No.

4

Cycle Count Serial No.

5

UDF1

Cycle Count UDF 1

Cycle Count UDF 1 T...

▼

Cycle Count UDF 1 Fi...

▼

Cycle Count UDF 1 Fi...

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:

Pick Managment Worksheet

Import Order to Pick...

Quantity

▼

Pick Worksheet - Pick...

Single Order

▼

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.

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

EDIT - WMS CREATE PICKS

Picking Mode

Single Order

Batch Cart Type

No. Slots

Maximum No. Picks to Cre...

0

PACK OUT:

Pack-Out

FIELD PROMPT ORDER

Packout - Parcel Code

1

SERVICE STATUS / RECEIVING:

Service Status / Receiving

Service Active on WMS

Save Service Repair S...

FIELDS

Service Status - Repai...

1

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:

WMS Receiving	
Receiving - Source No. . .	<input type="text"/>
Receiving - Item No. . . .	<input type="text" value="1"/>
Receiving - Variant C... .	<input type="text"/>
Receiving - Qty. to R... .	<input type="text" value="2"/>
Receiving - Verify Qt... .	<input type="text"/>
Receiving - Lot No.	<input type="text"/>
Receiving - Serial No. . .	<input type="text"/>
Receiving - Bin Code . . .	<input type="text" value="3"/>
Receiving - Handling... .	<input type="text"/>
Receiving - Net Weight .	<input type="text"/>
Receiving - Tare Wei... .	<input type="text"/>
UDF 1	
Prompt Sequence	<input type="text"/>
Table No.	<input type="text" value="v"/>
Field No.	<input type="text" value="v"/>
Field Name	<input type="text"/>

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

MISC. SETUPS

Receiving - Auto Assign Lot No ☐

Receiving - Prompt for Date ☐

Single UOM Scan ☐

Print Inventory Labels at Rcpt Prompt ▼

- 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:

WMS Consumption

Consumption - Source No.		Consumption - Lot No.	2
Consumption - Item No.	1	Consumption - Quantity	3

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

Wireless Output:

WMS Output

Output - Non-Conforming Qty.		Output - Lot No.	
Output - Scrap Qty.		Output - Serial No.	
Output - Operation	2	Output - Item No.	1
Output - Setup Time		Output - Bin Code	4
Output - Run Time	7	Output - W or M	5
Output - Output Qty.	3	Output - Work Center	6

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

WMS Picking:

WMS Picking	
FIELD PROMPT ORDER	
Picking - Source No.	<input type="text"/>
Picking - Inventory Tag No.	<input type="text"/>
Picking - Item No.	<input type="text" value="1"/>
Picking - Qty. to Handle	<input type="text" value="5"/>
Picking - Lot No.	<input type="text" value="3"/>
Picking - Serial No.	<input type="text" value="4"/>
Picking - Bin Code	<input type="text" value="2"/>
Picking - Handling Unit	<input type="text"/>
Picking - Net Weight	<input type="text"/>
Picking - Tare Weight	<input type="text"/>
Picking - Gross Weight	<input type="text"/>

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

Auto-Close Package	<input checked="" type="checkbox"/>
Picking - Prompt for Date	<input type="checkbox"/>
Allow Batch Picking	<input checked="" type="checkbox"/>
Allow Bulk Picking	<input checked="" type="checkbox"/>
Return to Pick Behavior	<input type="text" value="Prompt"/>
Picking Batch Nos	<input type="text" value="PICKBATCH"/>
Batch No. Visible on Lookup	<input type="checkbox"/>
Allow Pick Create Outter Pkg	<input type="checkbox"/>

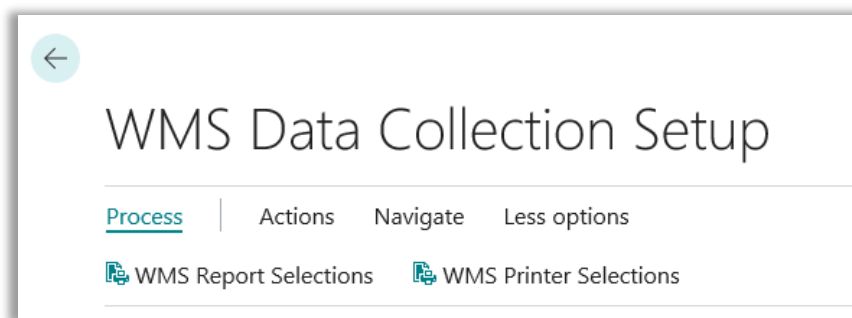
Pick Batch Nos.: Picks created will have a batch no. generated to track the picking batch.

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.



REPORT SELECTIONS				
Search + New Edit List Delete Open in Excel				
USAGE	SEQUENCE	PRINTER GROUP	REPORT ID	REPORT CAPTION
Package Label	1	Tag	14081615	WMS Shipping Tag
Subcontractor...	1	Tag	14081613	WMS Subcontract Packing List
Subcontractor...	1	Tag	14081614	WMS Subcontractor Tag
Item Label	1	Tag	14081601	Inventory Label

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