



Automated Warehouse Operations

David Gutman

Product Manager, Product success - Distribution

Timing and Agenda

October 18, 2022 - 10:00-11:30 AM

Day 1

Lesson 1: Automated Inventory Transfers

Lesson 2: Automated Counting in Physical Inventory

Lesson 3: Automated Processing of Inventory Issues

Lesson 4: Automated Processing of Inventory Receipts

Lesson 5: Automated Item and Storage Lookup

Lesson 6: Automated Picking and Packing Operations

October 19, 2022 - 10:00-11:30 AM

Day 2

Lesson 6: Automated Picking and Packing Operations

Lesson 7: Automated Packing Operations

Lesson 8: Automated Receiving and Putting Away Operations

Lesson 9: Automated Fulfilling Orders with Wave Picking

Timing and Agenda

October 20, 2022 - 10:00-11:30 AM

Day 3

Lesson 10: Automated Fulfilling Orders with Batch Picking

Lesson 11: Automated Fulfilling Orders with Paperless Picking

Day 1

Lesson 1: Automated Inventory Transfers

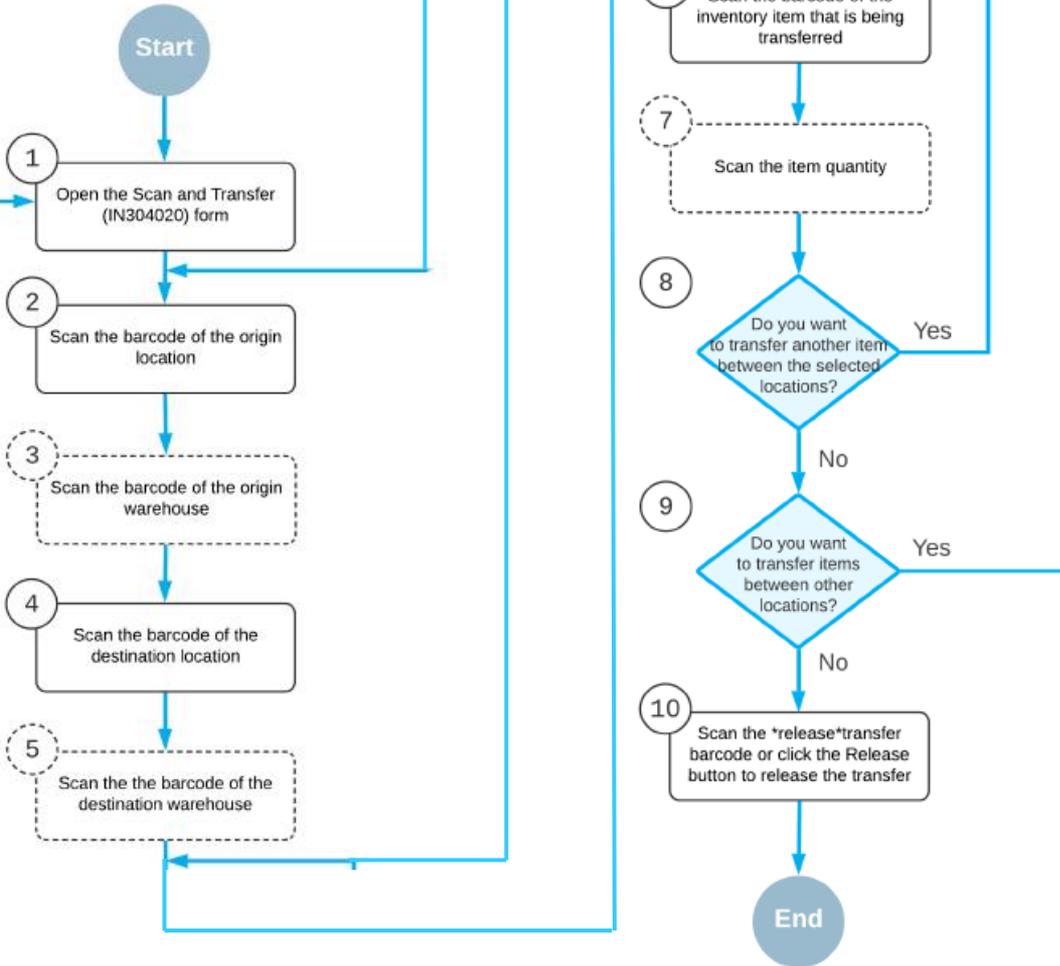
Learning Objectives

In this chapter, you will learn how to process single-step transfers of items between warehouse locations by using the functionality of automated warehouse operations. In particular, you will do the following:

- Enable the needed system features
- Learn the recommended settings that you can specify to make the system fit your business requirements
- Process a transfer of items between locations of the same warehouse in automated mode

Automated transferring of items

All actions on this diagram are performed by a user with the same job role



LEGEND
—— Required action
- - - - Optional action

Processing of Transfers: Process Activity

Story

Suppose that you, as a warehouse worker of the SweetLife Fruits & Jams company, have a task to transfer all jam jars from one location of the wholesale warehouse to another, which will clear the origin location for a new batch of jam.

You will prepare the single-step transfer to reflect the movement of jam jars between the warehouse locations.

Figure: Inventory transfer transaction

Transfers NOTES ACTIVITIES FILES

000060

📄 📁 ↶ + 🗑️ 📄 ⏪ < > ⏩ ⋮

Reference Nbr.:	<input type="text" value="000060"/>	Warehouse ID:	WHOLESALE - Wholesale Warehouse	Total Qty.:	4.00
Status:	Released	To Warehouse ...	WHOLESALE - Wholesale Warehouse		
Transfer Type:	1-Step	External Ref.:			
Date:	4/14/2022	Description:			
Post Period:	04-2022				

[DETAILS](#) [FINANCIAL](#)

🔄 + × [LINE DETAILS](#) [ADD ITEMS](#) [INVENTORY SUMMARY](#) ↔ 🗑️ ⬆

	📄	🗑️	Inventory ID	Description	Location	Project	To Location ID	Quantity	UOM
>	📄	🗑️	APJAM96	Apple jam 96 oz	L3R3S1	X	L2R3S1	1.00	PIECE
	📄	🗑️	LEMJAM96	Lemon jam 96 oz	L3R3S1	X	L2R3S1	1.00	PIECE
	📄	🗑️	ORJAM96	Orange jam 96 oz	L3R3S1	X	L2R3S1	1.00	PIECE
	📄	🗑️	ORJAM96	Orange jam 96 oz	L3R3S1	X	WRITEOFF	1.00	PIECE

Lesson 2: Automated Counting in Physical Inventory

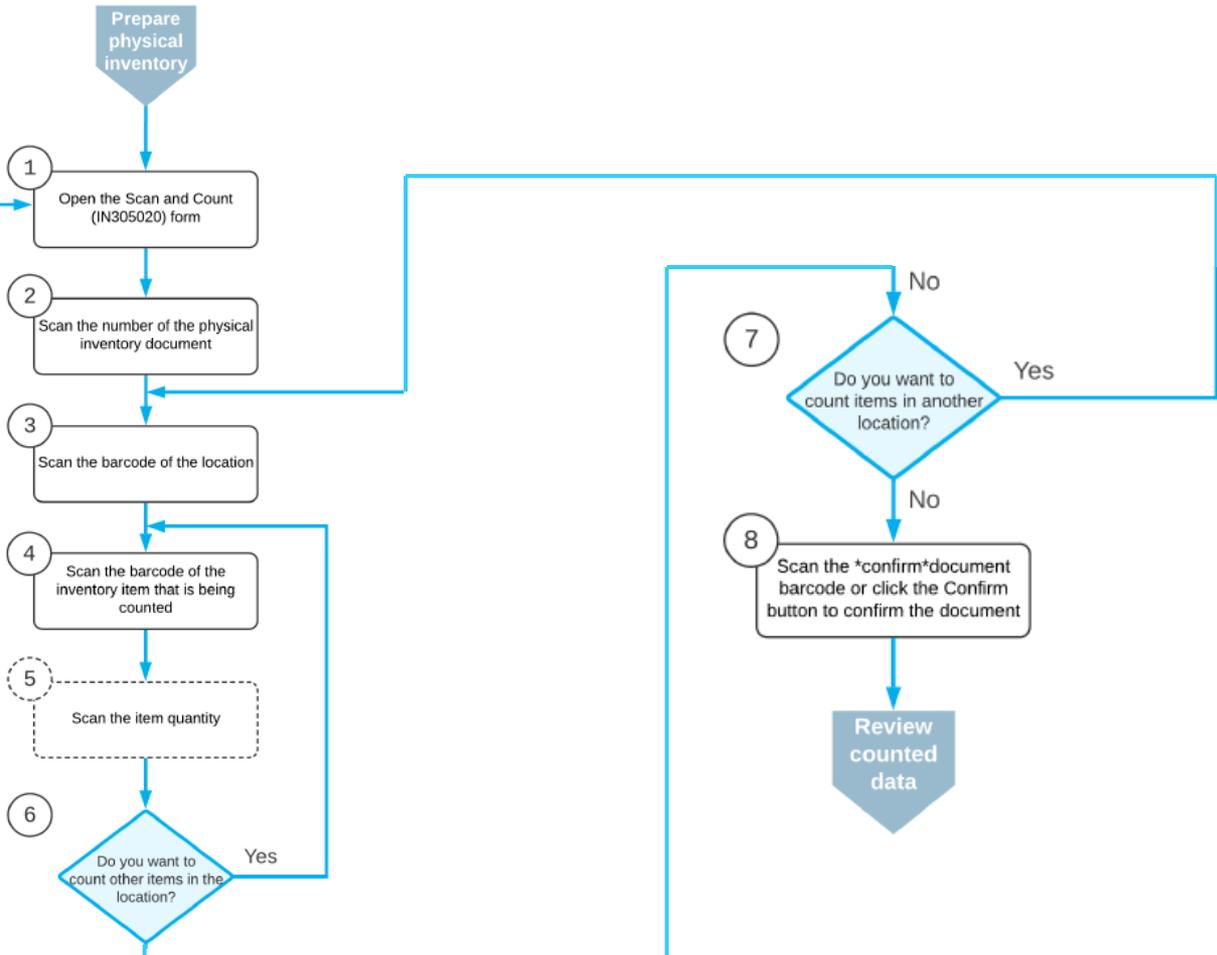
Learning Objectives

In this chapter, you will learn how to count stock items during physical inventory by using the functionality of automated warehouse operations. In particular, you will do the following:

- Enable the needed system features
- Learn the recommended settings that you can specify to make the system fit your business requirements
- Process counting of items during physical inventory in automated mode

Automated counting in physical inventory

All actions on this diagram are performed by a user with the same job role



LEGEND
—— Required action
- - - - Optional action

Counting in Physical Inventory: Process Activity

Story

Suppose that you, as a warehouse worker of the SweetLife Fruits & Jams company, are assigned to perform a physical inventory count by entering barcodes of the stock items and locations. You will count the quantities of orange jam in particular warehouse locations added to the physical inventory document, which your manager has provided to you.

Figure: Counted items in the physical inventory document

Physical Inventory Count

NOTES

📄 ↶ ⏪ ⏩ ↷

* Reference Nbr.: Freeze Date:
Warehouse: Number Of Lin...
Location: Start Line Nbr.:
Inventory ID: End Line Nbr.:
Description:

🔄 ADD |🗑️

📄	🔍	🗑️	Status	Line Nbr.	Tag Nbr.	Inventory ID	Description	Location	Base Unit	Physical Quantity
>	🔍	🗑️	Entered	1		ORJAM08	Orange jam 8 oz.	L1R3S1	PIECE	20.00
	🔍	🗑️	Entered	2		ORJAM32	Orange jam 32 oz	L1R3S2	PIECE	20.00
	🔍	🗑️	Entered	3		ORJAM96	Orange jam 96 oz	L1R3S3	PIECE	10.00
	🔍	🗑️	Entered	4		ORJAM08	Orange jam 8 oz.	L1R3S3	PIECE	1.00

Lesson 3: Automated Processing of Inventory Issues

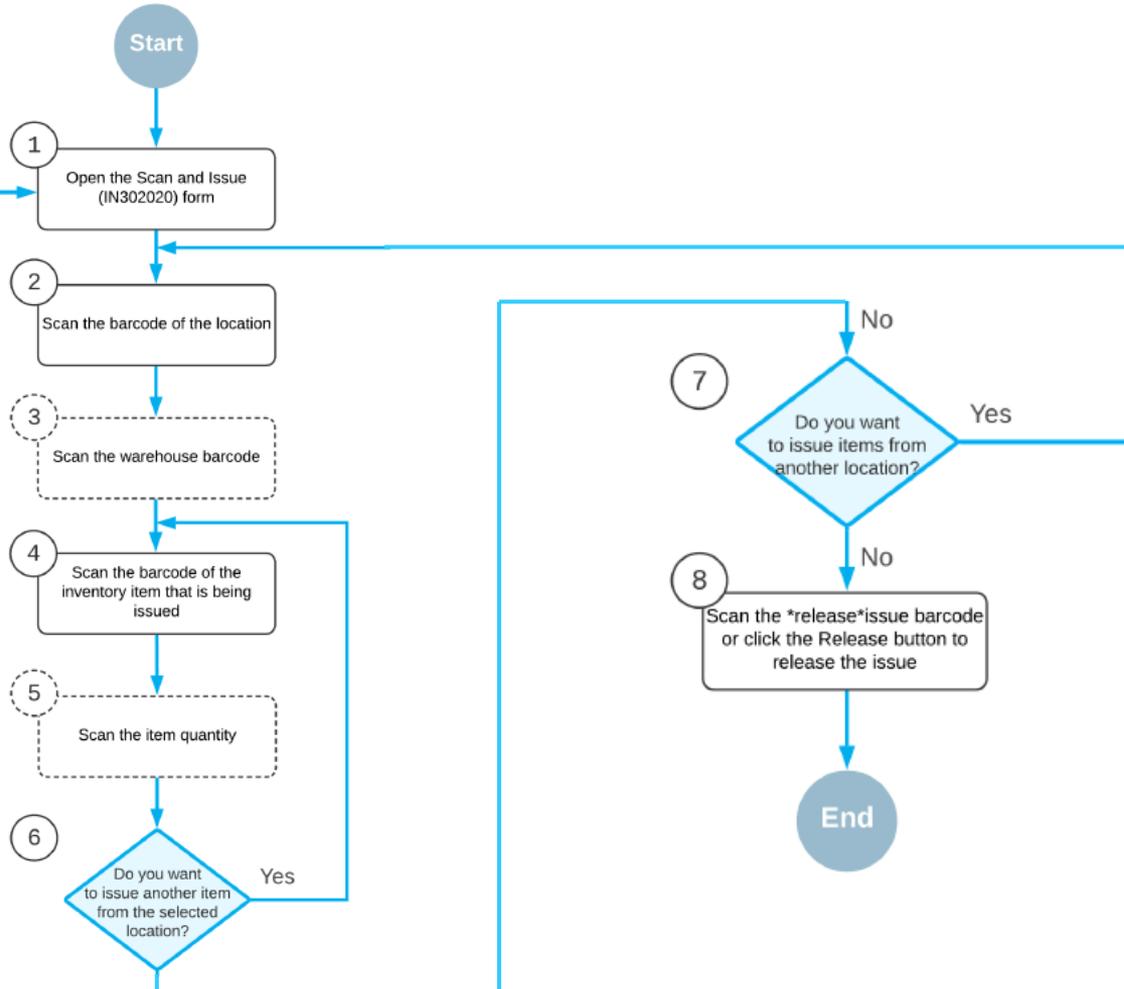
Learning Objectives

In this chapter, you will learn how to process inventory issues of items from warehouse locations by using the functionality of automated warehouse operations. In particular, you will do the following:

- Enable the needed system features
- Learn the recommended settings that you can specify to make the system fit your business requirements
- Process an issue of items from a warehouse in automated mode

Automated issuing of items

All actions on this diagram are performed by a user with the same job role



LEGEND

———— Required action

- - - - - Optional action

Processing of Inventory Issues: Process Activity

Story

Suppose that you, as a warehouse worker of the SweetLife Fruits & Jams company, have a task to inspect the jars of apple jam to find out if they are of appropriate quantity and to write off jars with any defects. If you find any jars with defects, you need to remove them from the location and process an inventory issue to record this removal in the system.

Figure: Inventory issue transaction

Issues
000064

📄 📁 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩ ...

Reference Nbr.:	<input type="text" value="000064"/>	External Ref.:		Total Qty.:	9.00
Status:	Released			Total Amount:	283.35
Date:	1/30/2022			Total Cost:	30.00
Post Period:	01-2022	Description:			

DETAILS FINANCIAL MANUFACTURING

🔄 + × LINE DETAILS ADD ITEMS INVENTORY SUMMARY |←| ☒ ⬆️

📄	📄	📄	Tran. Type	Inventory ID	Warehouse	Location	Quantity	UOM	Unit Price
>	📄	📄	Issue	APJAM08	WHOLESALE	L2R3S1	3.00	PIECE	4.1500
	📄	📄	Issue	APJAM96	WHOLESALE	L2R3S3	4.00	PIECE	45.1500
	📄	📄	Issue	APJAM96	WHOLESALE	L3R3S3	2.00	PIECE	45.1500

Lesson 4: Automated Processing of Inventory Receipts

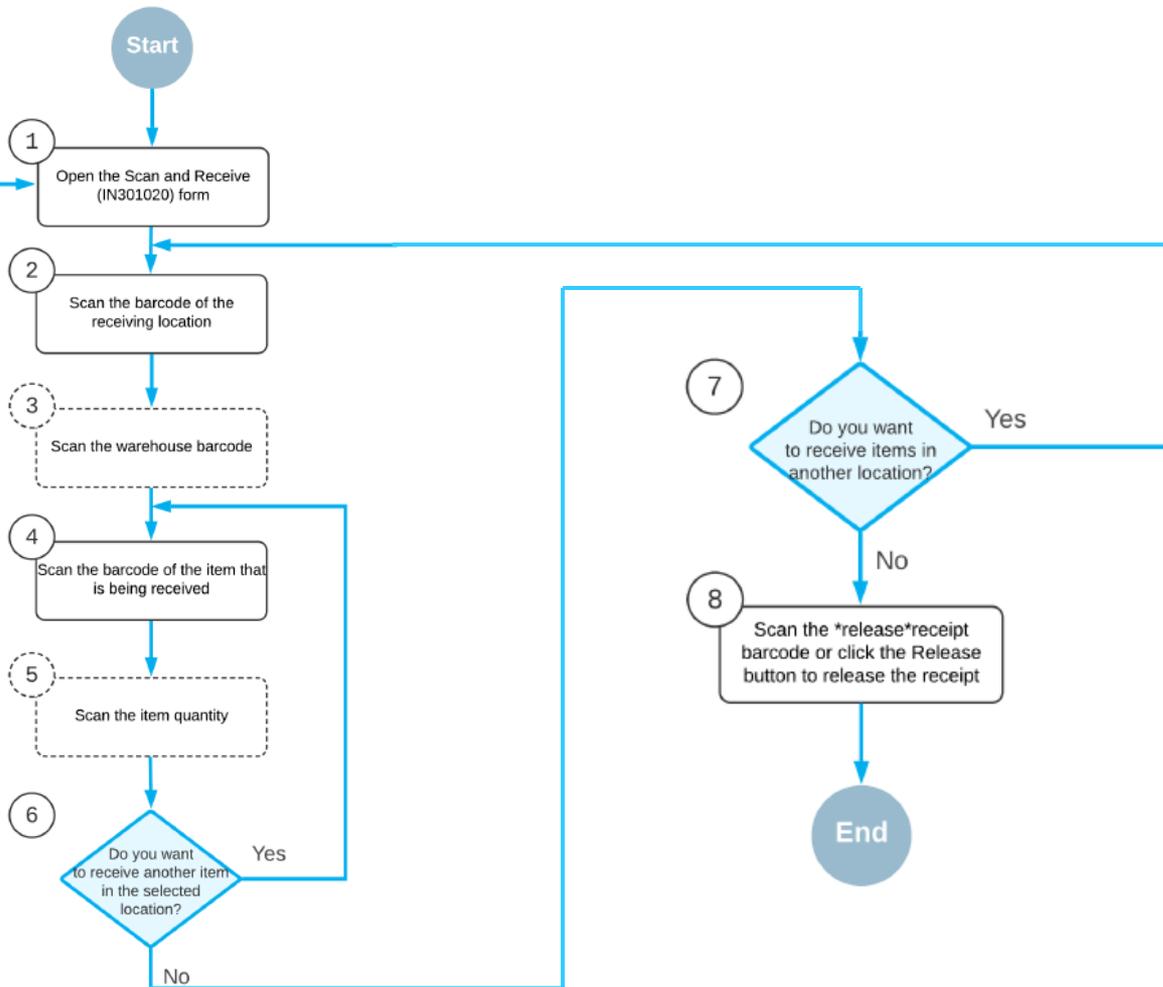
Learning Objectives

In this chapter, you will learn how to process inventory receipts of items from warehouse locations by using the functionality of automated warehouse operations. In particular, you will do the following:

- Enable the needed system features
- Learn the recommended settings that you can specify to make the system fit your business requirements
- Process a receipt of items to a warehouse in automated mode

Automated receiving of items

All actions on this diagram are performed by a user with the same job role



LEGEND

- Required action
- - - - Optional action

Processing of Inventory Receipts: Process Activity

Story

Suppose that you, as a warehouse worker of the SweetLife Fruits & Jams company, have a task to put apple, orange, and lemon jam, which you recently have received from production, to appropriate warehouse locations and process an inventory receipt to register this operation in the system.

Suppose that you have received the following jam, which you will move to appropriate locations: three boxes of apple jam in 8-ounce jars and four boxes of orange jam in 8-ounce jars (you will put these boxes to the L2R3S1 location); two boxes of apple jam in 96-ounce jars, three boxes of orange jam in 96-ounce jars, and one box of lemon jam in 96-ounce jars (you will put these boxes to the L2R3S3 location).

Figure: Inventory receipt transaction

Receipts

000058



Reference Nbr.:	<input type="text" value="000058"/>	Transfer Nbr.:		Total Qty.:	13.00
Status:	Released	External Ref.:		Total Cost:	287.82
Date:	1/30/2022	Description:			
Post Period:	01-2022				

DETAILS		FINANCIAL	MANUFACTURING
----------------	--	-----------	---------------

↺ + × LINE DETAILS ADD ITEMS ↔ ☒ ↑										
Inventory ID	Warehouse	Location	Quantity	UOM	Unit Cost	Ext. Cost	Reason Code	Description		
APJAM08	WHOLESALE	L2R3S1	3.00	JBOX	0.0000	0.00	INRECEIPT	Apple jam 8 oz.		
ORJAM08	WHOLESALE	L2R3S1	4.00	JBOX	0.0000	0.00	INRECEIPT	Orange jam 8 oz.		
APJAM96	WHOLESALE	L2R3S3	2.00	JBOX	50.0000	100.00	INRECEIPT	Apple jam 96 oz		
ORJAM96	WHOLESALE	L2R3S3	3.00	JBOX	35.3982	106.19	INRECEIPT	Orange jam 96 oz		
LEMJAM96	WHOLESALE	L2R3S3	1.00	JBOX	81.6327	81.63	INRECEIPT	Lemon jam 96 oz		

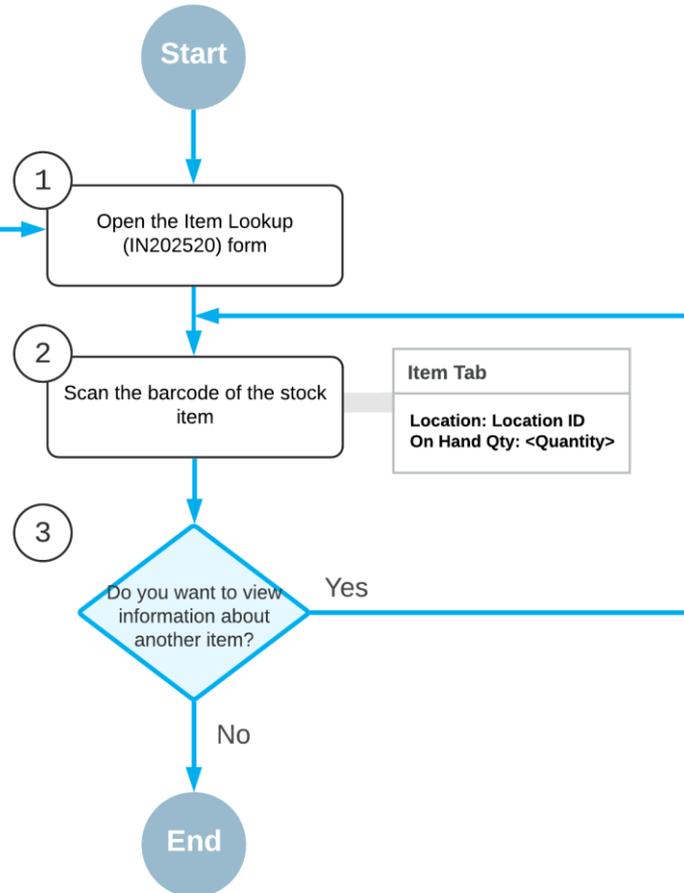
Lesson 5: Automated Item and Storage Lookup

Learning Objectives

In this chapter, you will learn how to search for information about stock items by scanning an item barcode and for the list of items stored in a particular location by scanning a location barcode with a barcode scanner or a mobile device with a scanning option.

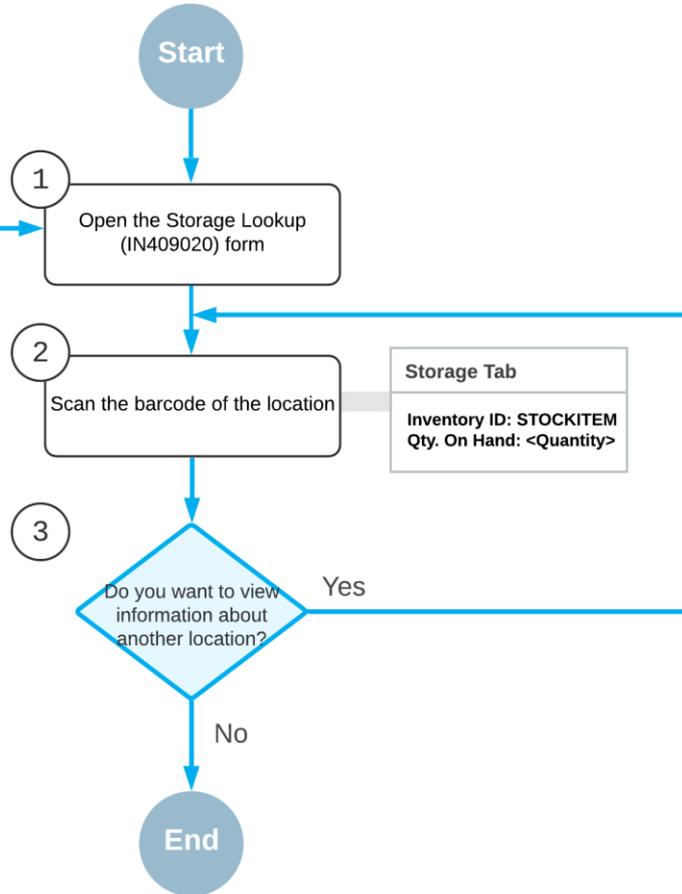
Automated lookup by item

All actions on this diagram are performed by a user with the same job role



Automated lookup by storage

All actions on this diagram are performed by a user with the same job role



Item and Storage Lookup: Process Activity

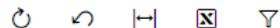
Story

Suppose that you are a warehouse worker in the wholesale warehouse of the SweetLife Fruits & Jams company.

When you walk around the warehouse you find items and boxes that have been inappropriately placed on the floor or on tables. Your work task is to find out what are these items and where they should be stored, so that you can move the items to the appropriate storage.

Figure: Reviewing the locations with apple jam

Item Lookup ☆



Scan:

Warehouse: WHOLESALE - Wholesale Warehouse

Inventory ID: APJAM32 - Apple jam 32 oz

LOOKUP MODE IS IN USE
The APJAM32 item is selected.
Scan the barcode of the item.

ITEM SCAN LOG

Item Class: JAM - Jam Product Workgroup:

Type: Finished Good Product Manager:

Is a Kit * Base Unit: PIECE

Valuation Method: Average * Sales Unit: BOX

Lot/Serial Class: DEFAULT * Purchase Unit: PIECE

Location	Available	Available for Shipment	On Hand	Base Unit
> L1R3S2	13.00	13.00	13.00	PIECE
L2R3S2	8.00	8.00	8.00	PIECE
L3R3S2	26.00	26.00	26.00	PIECE
MAIN	100.00	100.00	100.00	PIECE
TOTAL	147.00	147.00	147.00	PIECE

Day 2

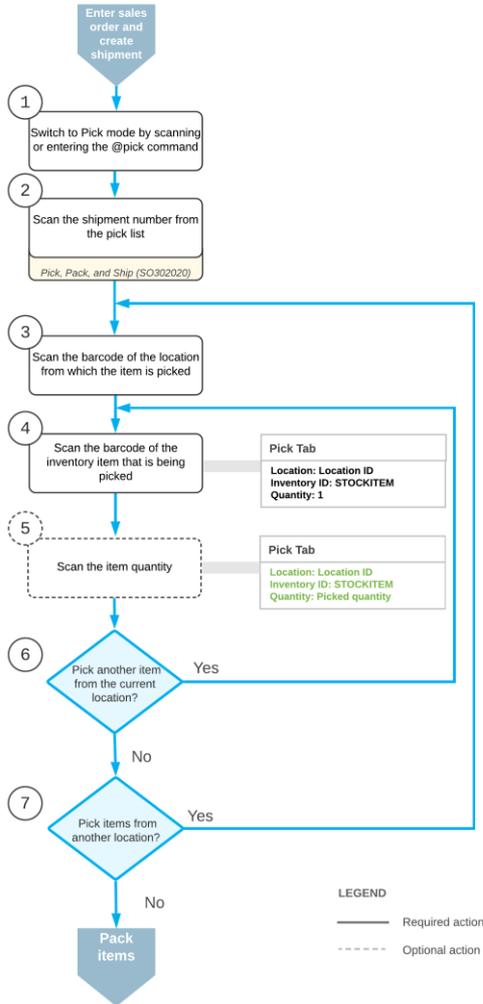
Lesson 6: Automated Picking and Packing Operations

Learning Objectives

In this chapter, you will learn about configuring and performing automated picking and packing. In particular, you will do the following:

- Enable the needed system features
- Specify the minimum required configuration for the automated picking and packing workflow
- Learn the recommended settings that you can specify to make the system fit your business requirements
- Pick the items for a shipment in an automated mode
- Pack the items into a box in an automated mode
- Confirm a shipment after picking and packing items

Automated workflow of picking before packing



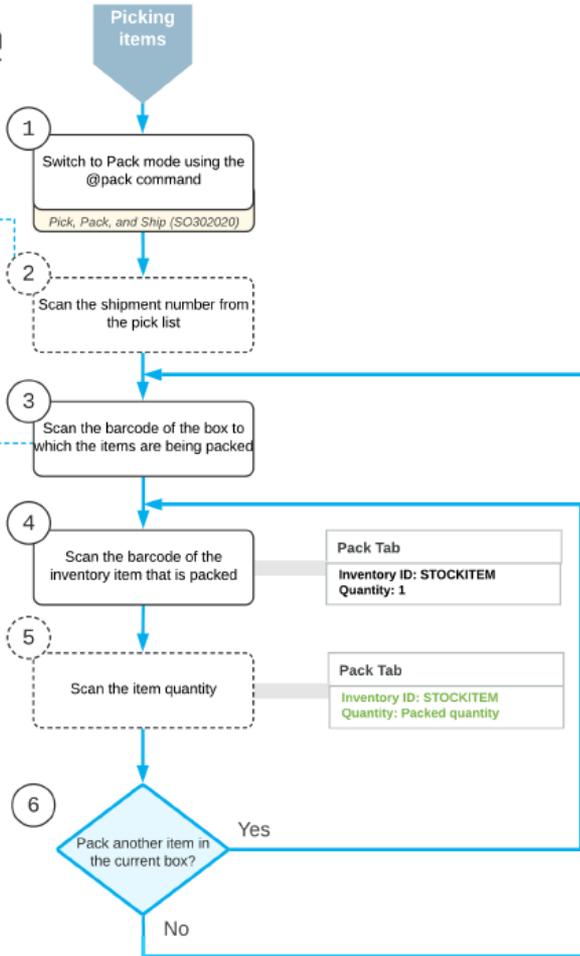
Automated workflow of packing already picked items



Packer

The system keeps the current shipment selected if the user switches to Pack mode from Pick mode.

The system performs this step automatically if auto-packaging is in use.



1 Switch to Pack mode using the @pack command
Pick, Pack, and Ship (SO302020)

2 Scan the shipment number from the pick list

3 Scan the barcode of the box to which the items are being packed

4 Scan the barcode of the inventory item that is packed

Pack Tab
Inventory ID: STOCKITEM
Quantity: 1

5 Scan the item quantity

Pack Tab
Inventory ID: STOCKITEM
Quantity: Packed quantity

6 Pack another item in the current box?

These steps are required if the system cannot calculate the weight of the package automatically based on the item settings.

7 Scan the barcode or click the OK button to confirm the package

8 Enter the total weight of the box

9 Pack another box?

10 Scan the barcode or click the Confirm Shipment button to confirm the shipment

End

LEGEND
 ——— Required action
 - - - - - Optional action

Picking and Packing Operations: Process Activity

Story

Suppose that you are a warehouse worker of the wholesale warehouse of the SweetLife Fruits & Jams company.

Your warehouse manager gives you a task to prepare a shipment. In your organization, the pick and pack workflow is used, which means that you go through the warehouse locations and pick the items listed in the shipment pick list. Then you go to the packing line and pack the picked items into boxes.

Figure: Confirmed shipment

Shipments

000029 - FourStar Coffee & Sweets Shop

← 📄 🗑️ ↶ + 🗑️ ⏪ < > ⏩ **PREPARE INVOICE** UPDATE IN ...

Shipment Nbr.:	000029	Customer:	COFFEESHOP - FourStar Coffee & Sweets	Shipped Quant...	18.00
Type:	Shipment	Location:	MAIN - Primary Location	Control Quantity:	18.00
Status:	Confirmed	Warehouse ID:	WHOLESALE - Wholesale Warehouse	Shipped Weight:	3.100000
Operation:	Issue	Workgroup:		Shipped Volume:	3.100000
Shipment Date:	1/30/2022	Owner:		Packages:	1
				Package Weight:	0.030000

Description:

DETAILS ORDERS SHIPPING **PACKAGES**

🗑️	📄	🗑️	☑️	✖️	⏪	⏩	🔍	Confirmer	* Box ID	Type	Description	Weight	UOM	Declared Value	C.O.D. Amount
>	🗑️	📄	☑️						MEDIUM	Manual		0.0300	KG	0.0000	0.0000

Contents of Selected Package

🗑️	✖️	⏪	⏩	🔍	Shipment Split Line Nbr.	Inventory ID	UOM	Quantity
>					9	APJAM08	PIECE	10.00
					16	ORJAM32	PIECE	8.00

Lesson 7: Automated Packing Operations

Learning Objectives

In this chapter, you will learn about configuring and performing automated packing. In particular, you will do the following:

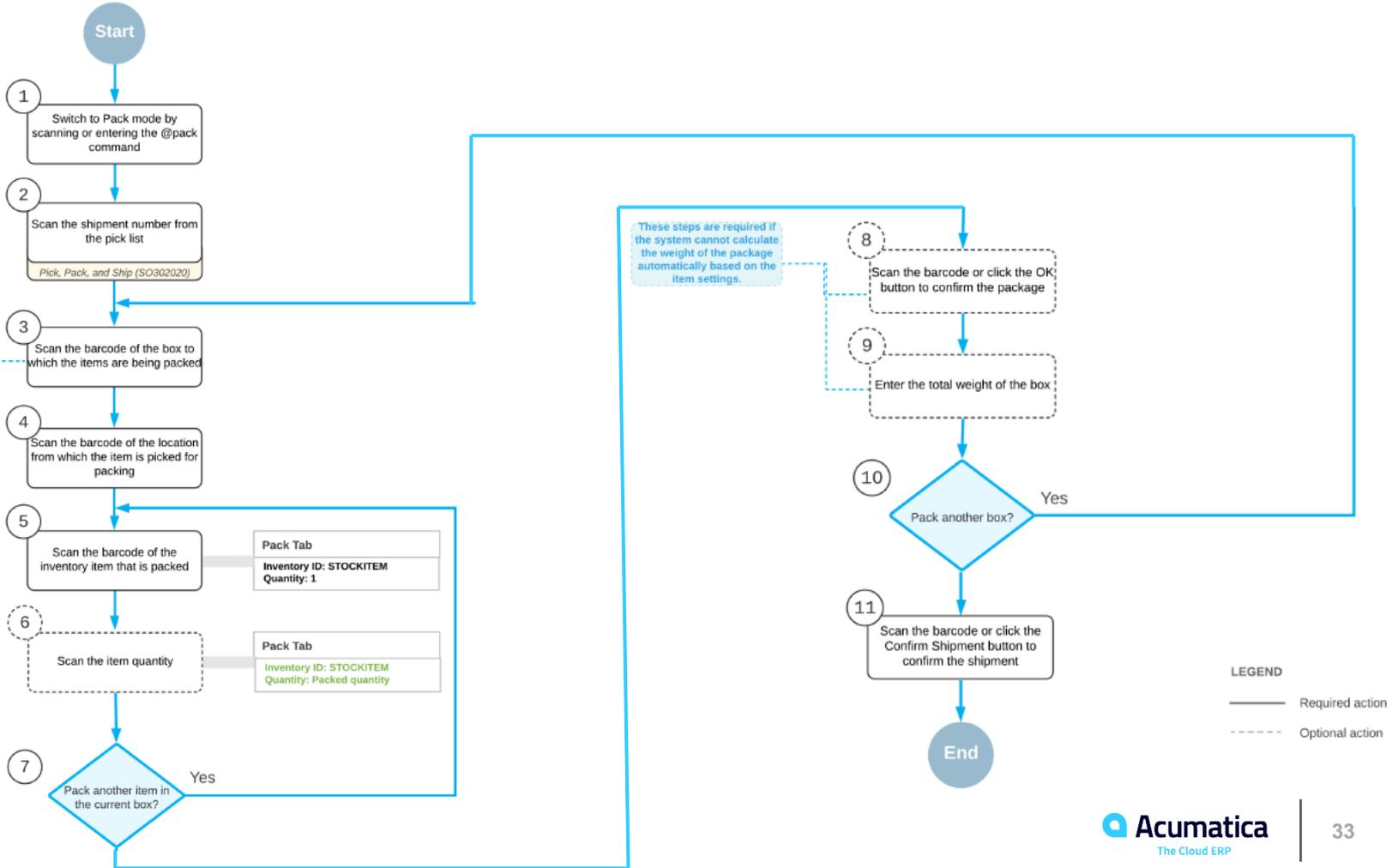
- Enable the needed system features
- Specify the minimum required configuration for the automated packing workflow
- Learn the recommended settings that you can specify to make the system fit your business requirements
- Pack items for a shipment in an automated mode
- Confirm a shipment after packing the items

Automated packing workflow without picking



Packer

The system performs this step automatically if auto-packing is in use.



Packing Operations: Process Activity

Story

Suppose that you are a warehouse worker of the wholesale warehouse of the SweetLife Fruits & Jams company.

Your warehouse manager gives you a task to pack a shipment. In your organization, the pack workflow is used, which means that you go through the warehouse locations, take the items, and pack the items into boxes for shipping.

Figure: Confirmed shipment

Shipments

000031 - FourStar Coffee & Sweets Shop

← 📄 🗑️ ↶ + 🗑️ ⏪ < > ⏩ **PREPARE INVOICE** UPDATE IN ...

Shipment Nbr.: 000031	Customer: COFFEESHOP - FourStar Coffee & Sweets	Shipped Quant...: 17.00
Type: Shipment	Location: MAIN - Primary Location	Control Quantity: 17.00
Status: Confirmed	Warehouse ID: WHOLESALE - Wholesale Warehouse	Shipped Weight: 3.100000
Operation: Issue	Workgroup:	Shipped Volume: 3.100000
Shipment Date: 1/30/2022	Owner:	Packages: 1
		Package Weight: 0.030000

Description:

DETAILS ORDERS SHIPPING **PACKAGES**

🔄 + × 📏 🗑️

📄	🗑️	🗑️	Confirmer	*Box ID	Type	Description	Weight	UOM	Declared Value	C.O.D. Amount
>	🗑️	🗑️	☑️	MEDIUM	Manual		0.0300	KG	0.0000	0.0000

Contents of Selected Package

🔄 + × 📏 🗑️

📄	Shipment Split Line Nbr.	Inventory ID	UOM	Quantity
>	5	APJAM08	PIECE	10.00
	6	ORJAM32	PIECE	7.00

Lesson 8: Automated Receiving and Putting Away Operations

Learning Objectives

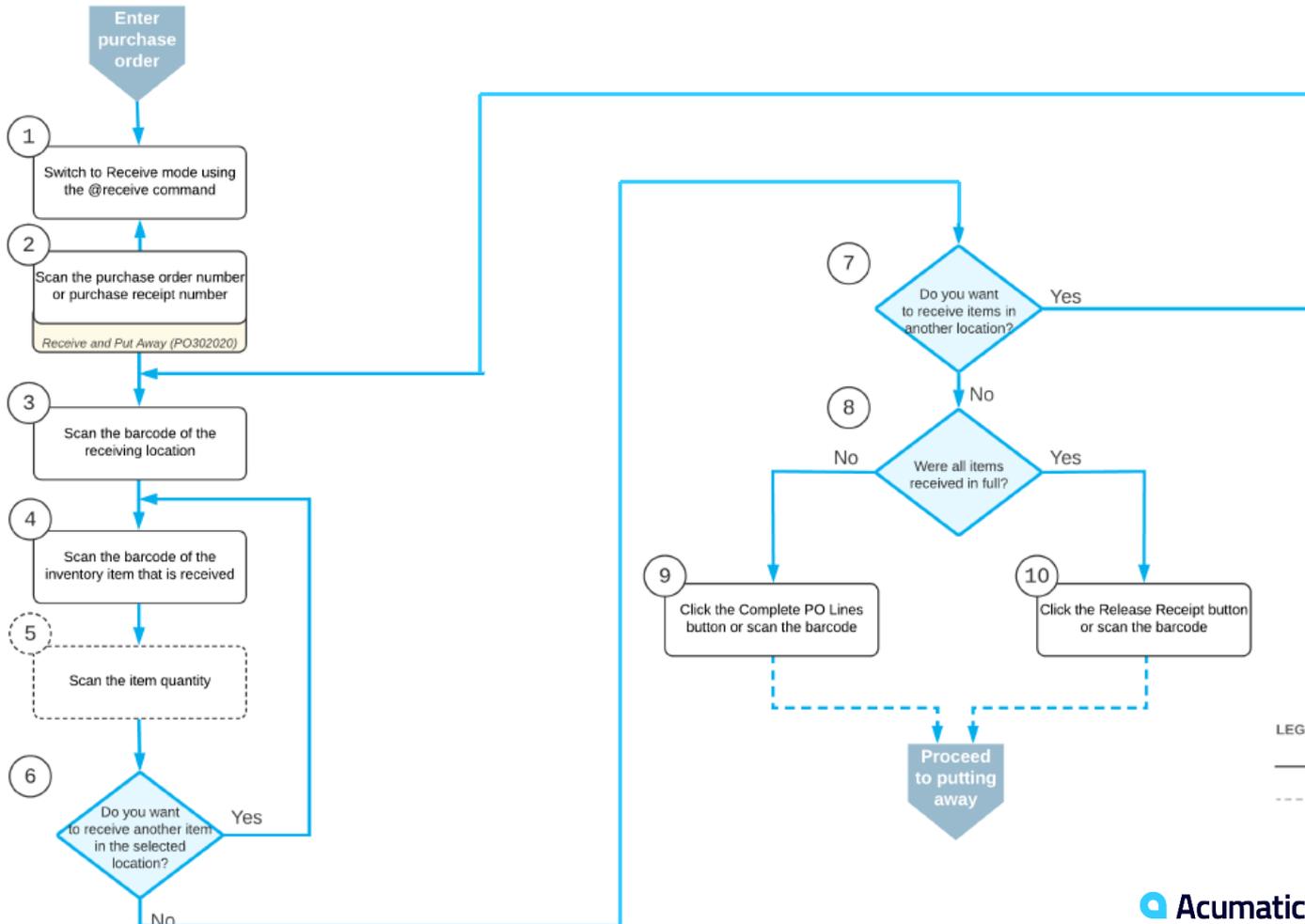
In this chapter, you will learn about configuring and performing automated receiving and putting away. In particular, you will do the following:

- Enable the needed system features
- Specify the minimum required configuration for the automated receiving and putting away workflow
- Learn the recommended settings that you can specify to make the system fit your business requirements
- Receive items to a receiving location of a warehouse in an automated mode
- Put away items in their storage locations in an automated mode

Automated receiving workflow



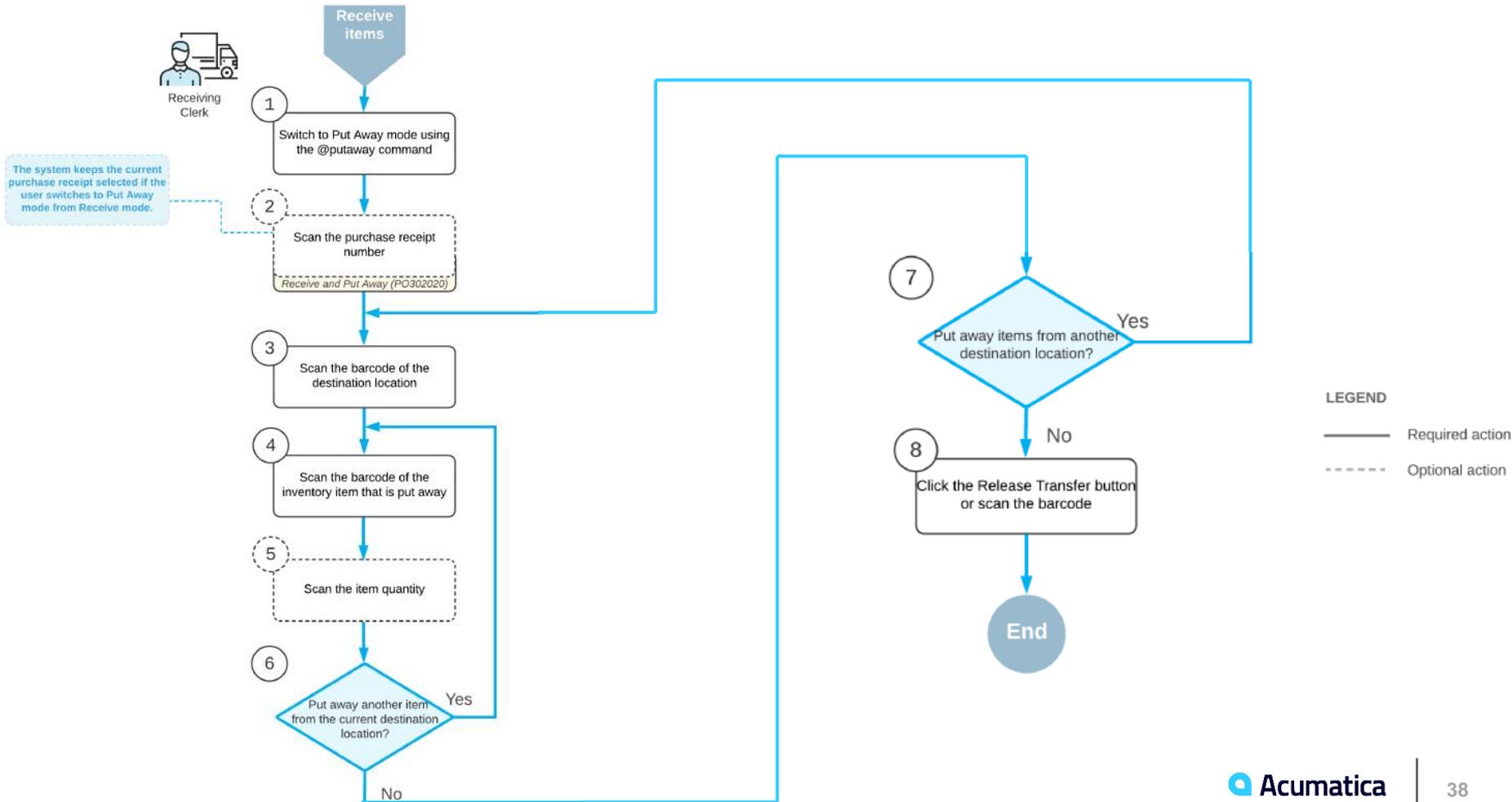
Receiving Clerk



LEGEND

- Required action
- - - Optional action

Automated workflow of putting away received items



Receiving and Putting Away Operations: Process Activity

Story

Suppose that you are a warehouse worker in the wholesale warehouse of the SweetLife Fruits & Jams company.

Your warehouse manager gives you a task to receive the purchased fruits (80 pounds of apples and 60 pounds of oranges) in the warehouse. In your organization, the receive and put away workflow is used, which means that you receive the purchased items at a receiving location of the warehouse, and then go through the warehouse locations and put away the items in the locations where the fruits are stored. Also suppose that you are putting away the apples and part of the oranges in one fruit location, and the rest of the oranges in another fruit location.

Figure: Inventory transfer transaction

Transfers

000060

NOTES ACTIVITIES FILES TOOLS



Reference Nbr.:	000060	Warehouse ID:	WHOLESALE - Wholesale Warehouse	Total Qty.:	140.00
Status:	Released	To Warehouse ...	WHOLESALE - Wholesale Warehouse		
Transfer Type:	1-Step	External Ref.:			
Date:	1/30/2022	Description:			
Post Period:	01-2022				

DETAILS FINANCIAL

Inventory ID	Location	To Location ID	Quantity	UOM	Project	To Cost Code	Cost Code	Reason Code
APPLES	MAIN	F1S2	80.00	LB	X			
ORANGES	MAIN	F1S2	40.00	LB	X			
ORANGES	MAIN	F2S2	20.00	LB	X			

Lesson 9: Automated Fulfilling Orders with Wave Picking

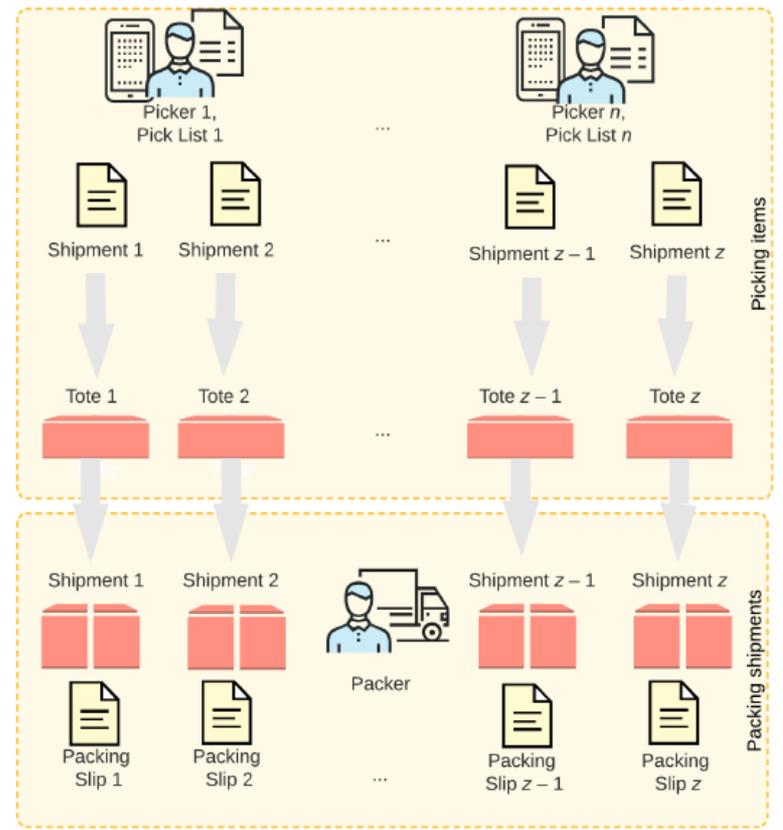
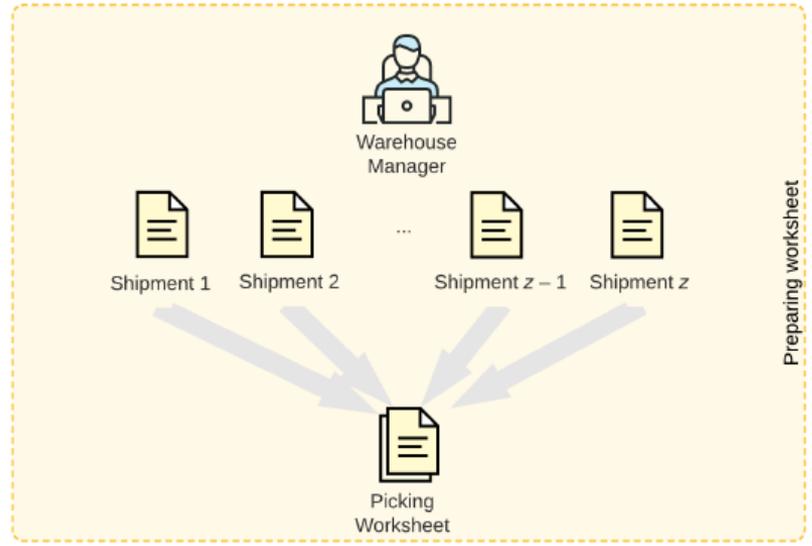
Learning Objectives

In this chapter, you will learn about using wave picking workflow for fulfilling the orders. In particular, you will do the following:

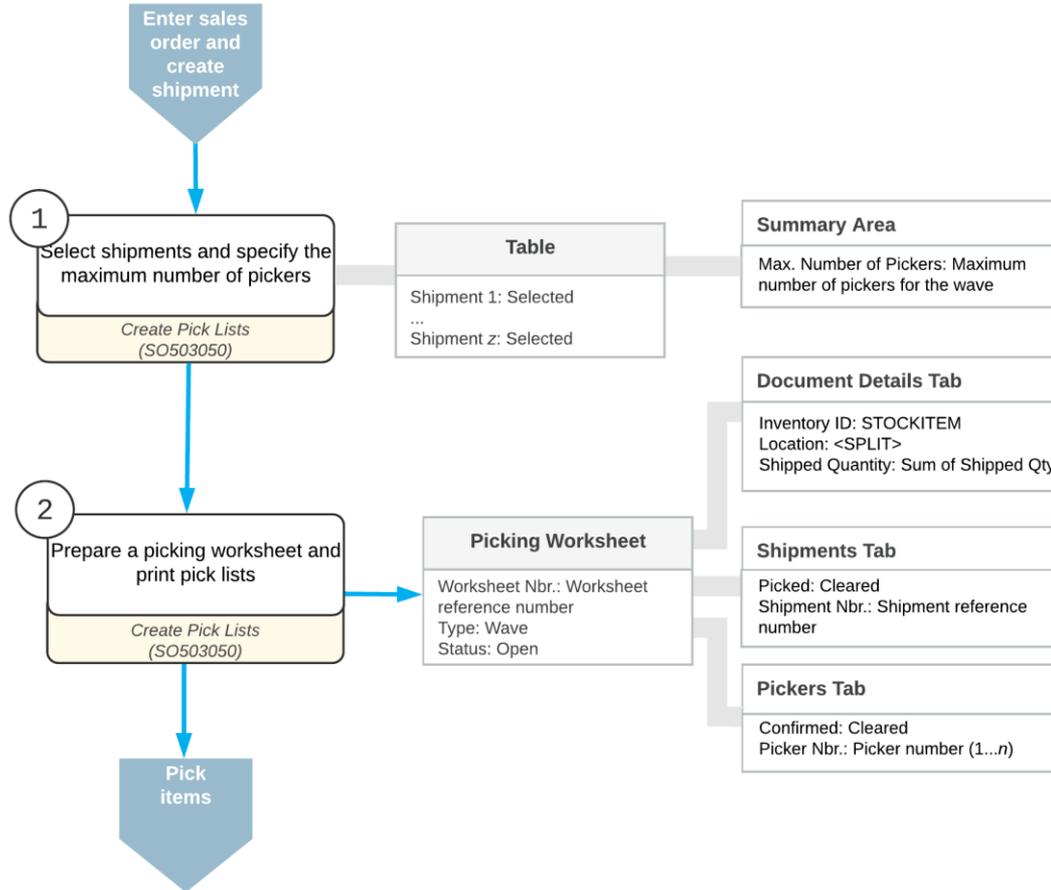
- Enable the needed system features
- Specify the minimum required configuration for the wave picking workflow
- Learn the recommended settings that you can specify to make the system fit your business requirements
- Prepare a wave picking worksheet
- Pick and pack items in a wave
- Confirm a shipment after packing the items

Wave picking process

Enter sales order and prepare shipment



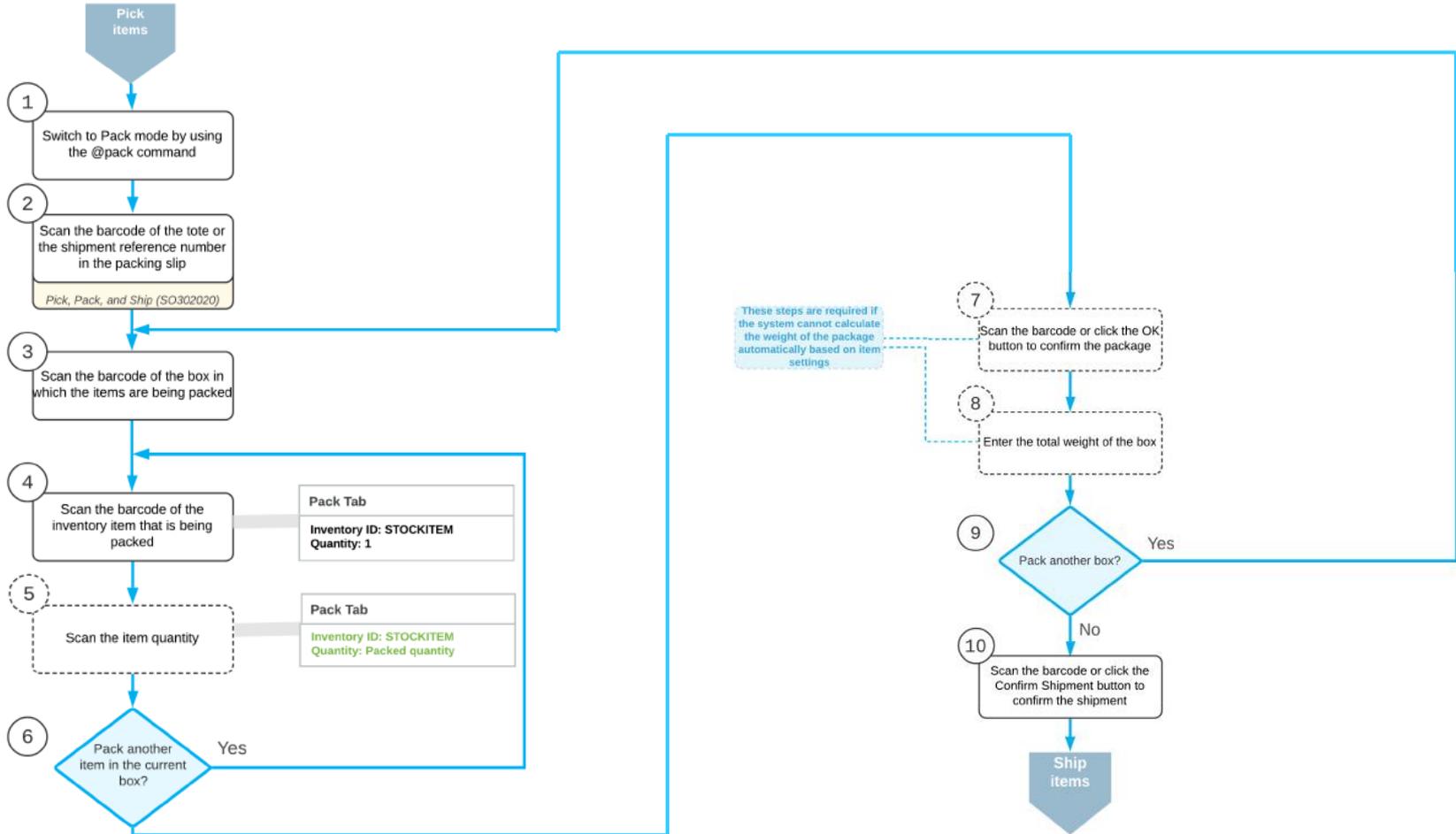
Preparation of the picking worksheet for wave picking



Packing of items after wave picking



Packer



Wave Picking: Process Activity

Story

Suppose that the wholesale warehouse of SweetLife was temporarily closed because of inventory counting. During this time, multiple orders have been entered into the system, and they now require shipping. The warehouse manager wants to speed up the process of picking and packing items by creating a wave picking worksheet and assigning this work to multiple pickers. After the warehouse workers pick the items in a wave, a warehouse worker acting as the packer needs to pack the items and confirm the shipments.

Figure: Locations in which the items are allocated

Picking Worksheets
000001 - Wholesale Warehouse

UNLINK ALL SHIPMENTS PRINT PICK LISTS PRINT PACKING SLIPS PICK ALL SHIPMENTS

Worksheet Nbr.: 000001 Warehouse ID: WHOLESALE - Wholesale Warehouse
Type: Wave Shipped Quantity: 136.00
Status: Open Shipped Weight: 23.000000
 Hold Shipped Volume: 23.000000
Picking Date: 1/30/2022 Packages: 0
Package Weight: 0.000000

DETAILS SHIPMENTS PICKERS

LINE DETAILS

Warehouse	Location	Inventory ID	UOM
> WHOLESALE	<SPLIT>	APJAM08	PIECE
WHOLESALE	<SPLIT>	ORJAM32	PIECE
WHOLESALE	L1R2S2	LEMJAM96	PIECE

Line Details

Inventory ID	Location	Picked Quantity	Quantity	UOM
> APJAM08	L1R1S1	0.00	22.00	PIECE
APJAM08	L1R1S2	0.00	6.00	PIECE
APJAM08	L1R2S1	0.00	21.00	PIECE
APJAM08	L1R2S2	0.00	5.00	PIECE
APJAM08	L2R2S1	0.00	11.00	PIECE

Figure: Shipments assigned to the picker

Picking Worksheets
000001 - Wholesale Warehouse

Assigned Shipments

Worksheet Nbr.: 000001
Type: Wave
Status: Open
Picking Date: 1/30/2022

DETAILS SHIPMENTS PICKER

VIEW SHIPMENTS

Shipment Nbr.	Tote ID
> 000034	
000035	
000036	
000038	

Location	Inventory ID	Quantity	UOM	Picked Quantity
> L1R1S1	APJAM08	10.00	PIECE	0.00
L1R1S1	ORJAM32	8.00	PIECE	0.00

Picker Nbr. 1

Figure: The users who confirmed the picking of the wave

Picking Worksheets

000001 - Wholesale Warehouse

UNLINK ALL SHIPMENTS PRINT PICK LISTS PRINT PACKING SLIPS

Worksheet Nbr.: 000001 Warehouse ID: WHOLESALE - Wholesale Warehouse

Type: Wave Shipped Quantity: 136.00

Status: **Picked** Shipped Weight: 23.000000

Hold Shipped Volume: 23.000000

Picking Date: 1/30/2022 Packages: 0

Package Weight: 0.000000

DETAILS SHIPMENTS **PICKERS**

VIEW SHIPMENTS VIEW PICK LIST

Confirmed	Picker Nbr.	User	Path Length	Cart ID
<input checked="" type="checkbox"/>	1	perkins	10	
<input checked="" type="checkbox"/>	2	rollins	0	
<input checked="" type="checkbox"/>	3	hardin	40	

Figure: Shipments ready for packing

Picking Worksheets

000001 - Wholesale Warehouse

UNLINK ALL SHIPMENTS PRINT PICK LISTS PRINT PACKING SLIPS PICK #

Worksheet Nbr.:	000001	Warehouse ID:	WHOLESALE - Wholesale Warehouse
Type:	Wave	Shipped Quantity:	136.00
Status:	Picked	Shipped Weight:	23.000000
	<input type="checkbox"/> Hold	Shipped Volume:	23.000000
Picking Date:	1/30/2022	Packages:	0
		Package Weight:	0.000000

DETAILS SHIPMENTS PICKERS

VIEW PICKERS

Picked	Shipment Nbr.	Picked Qty.	Packed Qty.	Shipped Quantity	Shipped Weight	Shipped Volume	Status	Unlinked
<input checked="" type="checkbox"/>	000034	18.00	0.00	18.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000035	25.00	0.00	25.00	8.520000	8.520000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000036	11.00	0.00	11.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000037	11.00	0.00	11.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000038	7.00	0.00	7.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000039	18.00	0.00	18.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000040	8.00	0.00	8.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000041	4.00	0.00	4.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000042	12.00	0.00	12.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000043	6.00	0.00	6.00	8.520000	8.520000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000044	14.00	0.00	14.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>	000045	2.00	0.00	2.00	5.680000	5.680000	Open	<input type="checkbox"/>

Figure: Packing details for the shipment

Shipments

000034 - FourStar Coffee & Sweets Shop

← 📄 🗑️ ↶ + 🗑️ ⏪ < > ⏩ **PREPARE INVOICE** UPDATE IN ...

Shipment Nbr.: 000034	Customer: COFFEESHOP - FourStar Coffee & Sweets	Shipped Quant...: 18.00
Type: Shipment	Location: MAIN - Primary Location	Control Quantity: 18.00
Status: Confirmed	Warehouse ID: WHOLESALE - Wholesale Warehouse	Shipped Weight: 0.000000
Operation: Issue	Workgroup:	Shipped Volume: 0.000000
Shipment Date: 1/30/2022	Owner:	Packages: 1
	Worksheet Nbr.: 000001	Package Weight: 0.050000

Description:

DETAILS ORDERS SHIPPING **PACKAGES**

☒	🗑️	☐	☑️	Confirmer	* Box ID	Type	Description	Weight	UOM	Declared Value	C.O.D. Amount
>	🗑️	☐	☑️		LARGE	Manual		0.0500	KG	0.0000	0.0000

Contents of Selected Package

☒	+	×	⏪	☒	Shipment Split Line Nbr.	Inventory ID	UOM	Quantity
>					2	APJAM08	PIECE	10.00
					4	ORJAM32	PIECE	8.00

Day 3

Lesson 10: Automated Fulfilling Orders with Batch Picking

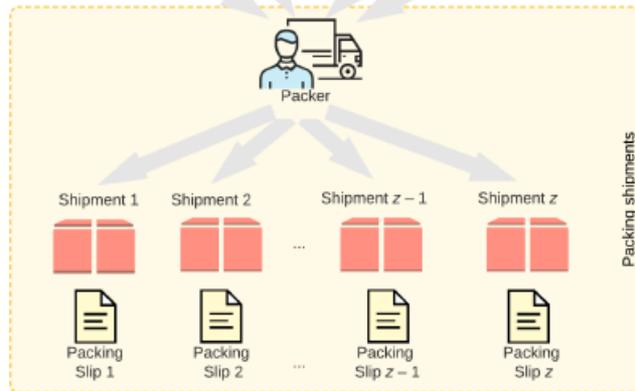
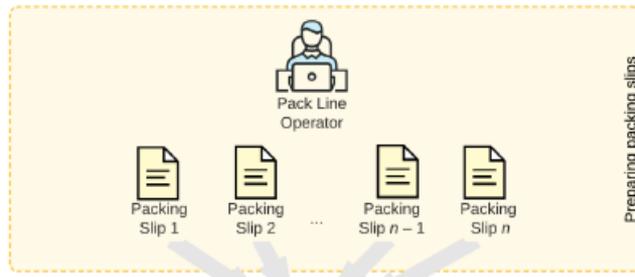
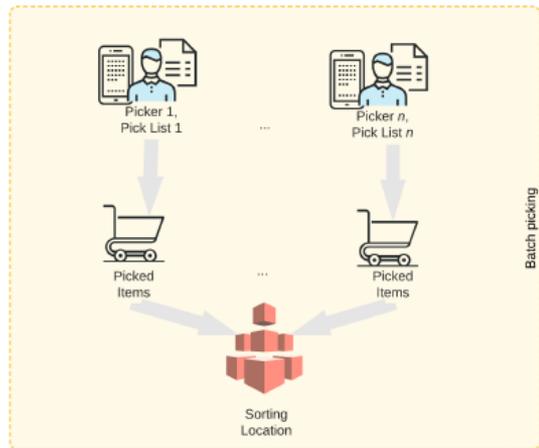
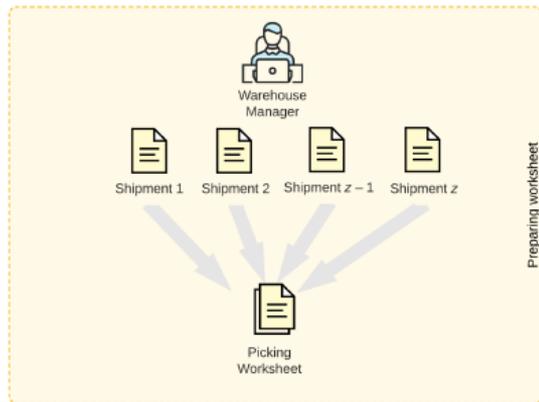
Learning Objectives

In this chapter, you will learn about using batch picking workflow for fulfilling the orders. In particular, you will do the following:

- Enable the needed system features
- Specify the minimum required configuration for the batch picking workflow
- Learn the recommended settings that you can specify to make the system fit your business requirements
- Prepare a batch picking worksheet
- Pick and pack items in a batch
- Confirm a shipment after packing the items

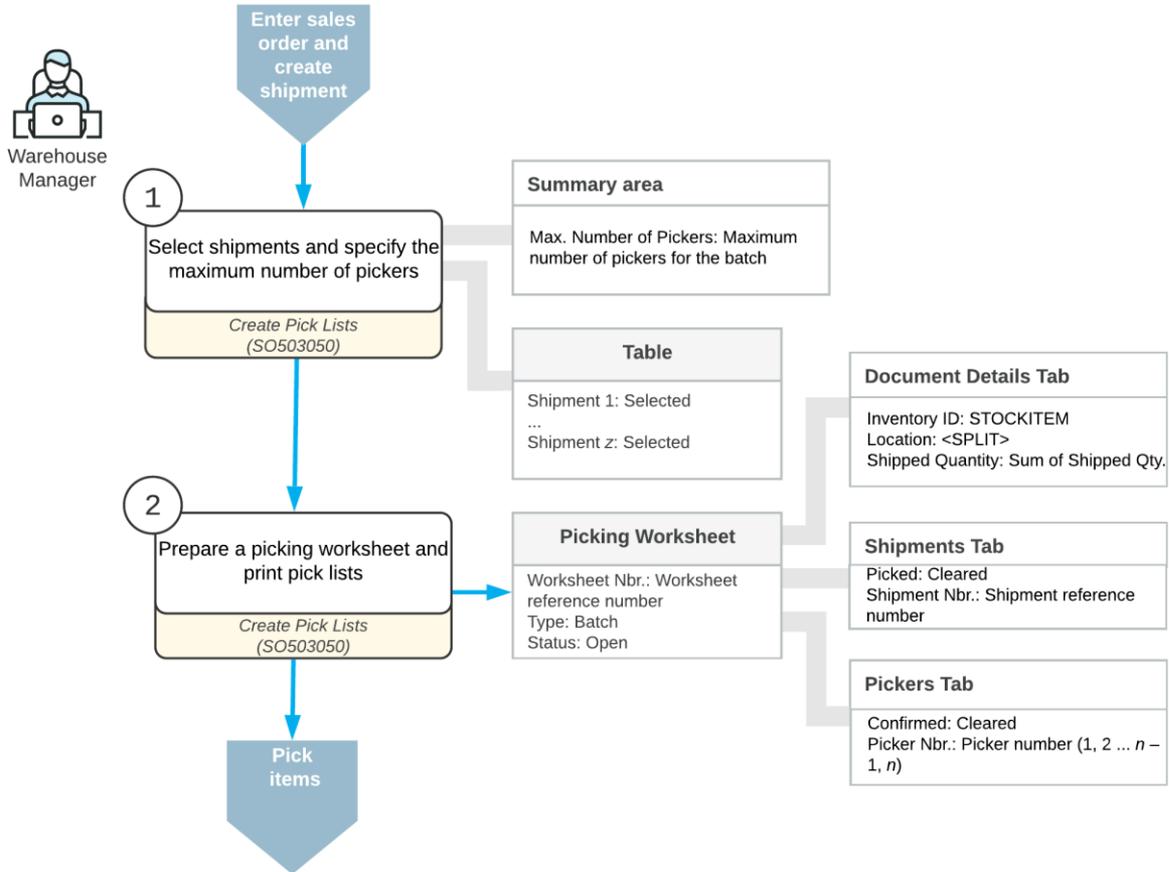
Batch picking process

Enter sales order and prepare shipment

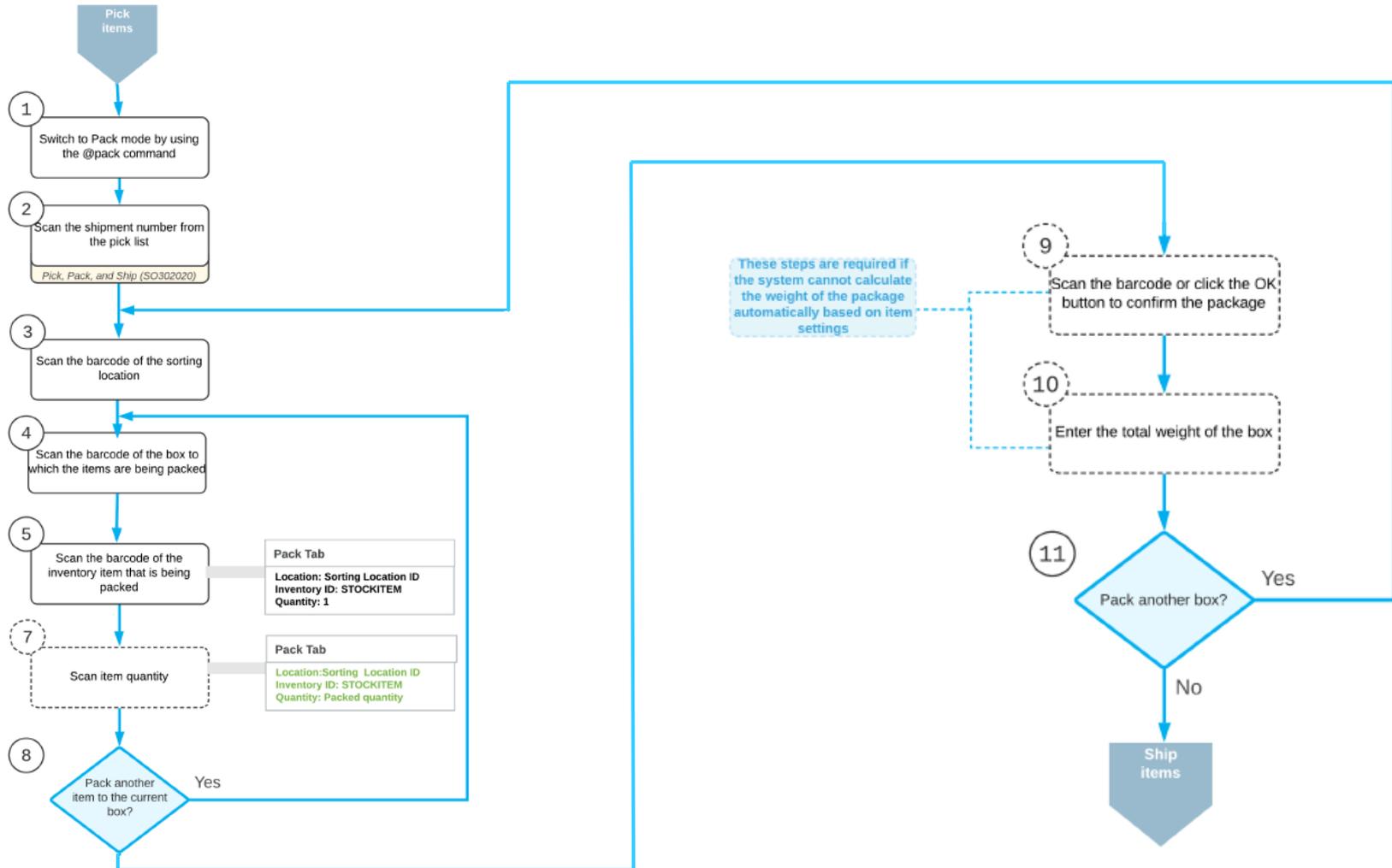


Ship Items

Preparation of the picking worksheet for batch picking



Packing of items after batch picking



Batch Picking: Process Activity

Story

Suppose that the wholesale warehouse of SweetLife was temporarily closed because of inventory counting. During this time, multiple orders have been entered into the system, and they now require shipping. The warehouse manager wants to speed up the process of picking and packing items by creating a batch picking worksheet and assigning this work to multiple pickers. After the warehouse workers pick the items and transfer them to a sorting location, a warehouse worker acting as the packer needs to pack the items and confirm the shipments.

Figure: Items to be picked for all the shipments included in the worksheet

Picking Worksheets

000002 - Wholesale Warehouse

         PRINT PICK LISTS PRINT PACKING SLIPS PICK ALL SHIPMENTS

Worksheet Nbr.:	<input type="text" value="000002"/>	Warehouse ID:	WHOLESALE - Wholesale Warehouse
Type:	Batch	Shipped Quantity:	125.00
Status:	Open	Shipped Weight:	43.000000
	<input type="checkbox"/> Hold	Shipped Volume:	43.000000
Picking Date:	1/30/2022	Packages:	0
		Package Weight:	0.000000

[DETAILS](#) [SHIPMENTS](#) [PICKERS](#)

   LINE DETAILS  

Warehouse	Location	Inventory ID	UOM	Shipped Qty.	Ordered Qty.	Open Qty.	Picked Qty.	Packed Qty.	Description
> WHOLESALE	<SPLIT>	APJAM08	PIECE	56.00	0.00	0.00	0.00	0.00	
WHOLESALE	<SPLIT>	LEMJAM96	PIECE	15.00	0.00	0.00	0.00	0.00	
WHOLESALE	<SPLIT>	ORJAM32	PIECE	54.00	0.00	0.00	0.00	0.00	

Figure: List of pickers of the shipments

Picking Worksheets
000002 - Wholesale Warehouse

Worksheet Nbr.: 000002 Warehouse ID: WHOLESALE - Wholesale Warehouse
Type: Batch Shipped Quantity: 125.00
Status: Open Shipped Weight: 43.000000
 Hold Shipped Volume: 43.000000
Picking Date: 1/30/2022 Packages: 0
Package Weight: 0.000000

DETAILS SHIPMENTS PICKERS

VIEW PICK LIST

Confirmec	Picker Nbr.	User	Path Length	Cart ID
<input type="checkbox"/>	1		0	
<input type="checkbox"/>	2		0	
<input type="checkbox"/>	3		0	
<input type="checkbox"/>	4		10	

Pick List

Location	Inventory ID	Quantity	UOM	Picked Quantity
L1R2S1	ORJAM32	5.00	PIECE	0.00
L1R2S2	LEMJAM96	9.00	PIECE	0.00
L1R2S3	LEMJAM96	4.00	PIECE	0.00

Figure: The users who confirmed the picking of the batch

Picking Worksheets

000002 - Wholesale Warehouse

🔄 ⬅️ 📄 🗑️ ⏪ ⏩ ⏴ ⏵ PRINT PICK LISTS PRINT PACKING SLIPS

Worksheet Nbr.:	<input type="text" value="000002"/>	Warehouse ID:	WHOLESALE - Wholesale Warehouse
Type:	Batch	Shipped Quantity:	125.00
Status:	Picked	Shipped Weight:	43.000000
	<input type="checkbox"/> Hold	Shipped Volume:	43.000000
Picking Date:	1/30/2022	Packages:	0
		Package Weight:	0.000000

DETAILS SHIPMENTS **PICKERS**

🔄 + × VIEW PICK LIST ⏪ ⏵

Confirmed	Picker Nbr.	User	Path Length	Cart ID	Sorting Location
<input checked="" type="checkbox"/>	1	rollins	0		SORT
<input checked="" type="checkbox"/>	2	perkins	0		SORT
<input checked="" type="checkbox"/>	3	hardin	0		SORT
<input checked="" type="checkbox"/>	4	barber	10		SORT

Figure: Shipments ready for packing

Picking Worksheets

000002 - Wholesale Warehouse

↶
←
📄
🗑️
⏪
<
>
⏩
PRINT PICK LISTS
PRINT PACKING SLIPS
PICK ALL SHIPMENTS

Worksheet Nbr.: <input type="text" value="000002"/>	Warehouse ID: <input type="text" value="WHOLESALE - Wholesale Warehouse"/>
Type: <input type="text" value="Batch"/>	Shipped Quantity: <input type="text" value="125.00"/>
Status: <input type="text" value="Picked"/>	Shipped Weight: <input type="text" value="43.000000"/>
<input type="checkbox"/> Hold	Shipped Volume: <input type="text" value="43.000000"/>
Picking Date: <input type="text" value="1/30/2022"/>	Packages: <input type="text" value="0"/>
	Package Weight: <input type="text" value="0.000000"/>

[DETAILS](#)
[SHIPMENTS](#)
[PICKERS](#)

↶
+
×
VIEW PICKERS
⏪
⏩

<input checked="" type="checkbox"/>	Picked	Shipment Nbr.	Picked Qty.	Packed Qty.	Shipped Quantity	Shipped Weight	Shipped Volume	Status	Unlinked
<input checked="" type="checkbox"/>		000046	6.00	0.00	6.00	5.680000	5.680000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000047	9.00	0.00	9.00	5.680000	5.680000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000048	4.00	0.00	4.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000049	8.00	0.00	8.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000050	13.00	0.00	13.00	11.360000	11.360000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000051	12.00	0.00	12.00	8.520000	8.520000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000052	7.00	0.00	7.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000053	15.00	0.00	15.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000054	9.00	0.00	9.00	5.680000	5.680000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000055	24.00	0.00	24.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000056	12.00	0.00	12.00	0.000000	0.000000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000057	2.00	0.00	2.00	5.680000	5.680000	Open	<input type="checkbox"/>
<input checked="" type="checkbox"/>		000058	4.00	0.00	4.00	0.000000	0.000000	Open	<input type="checkbox"/>

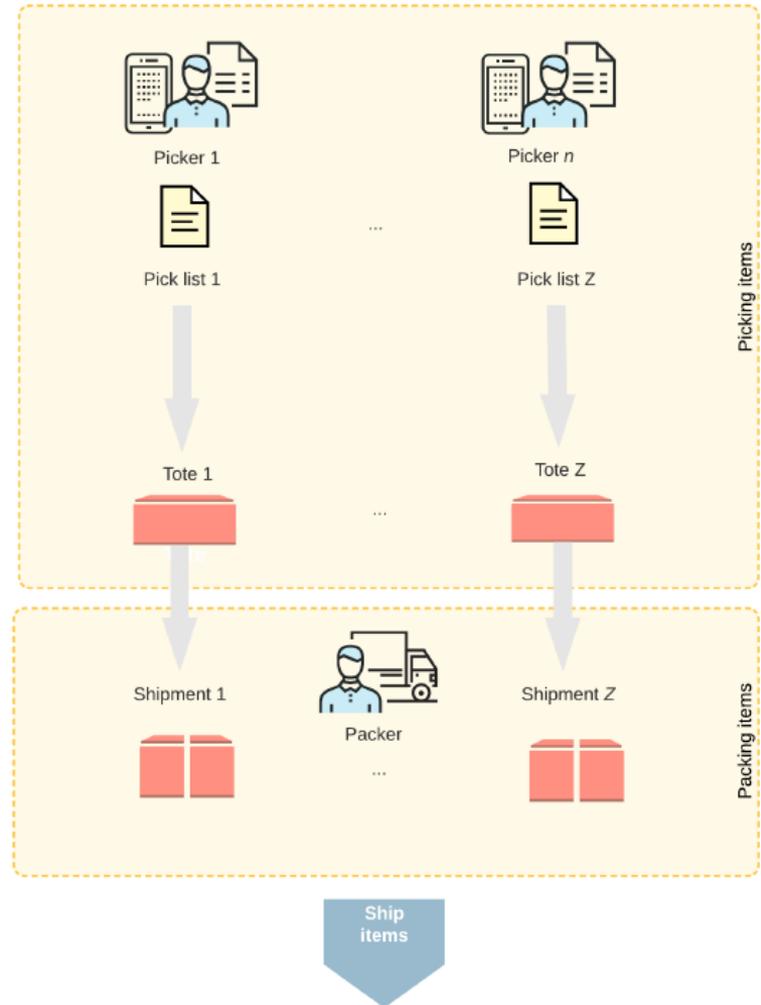
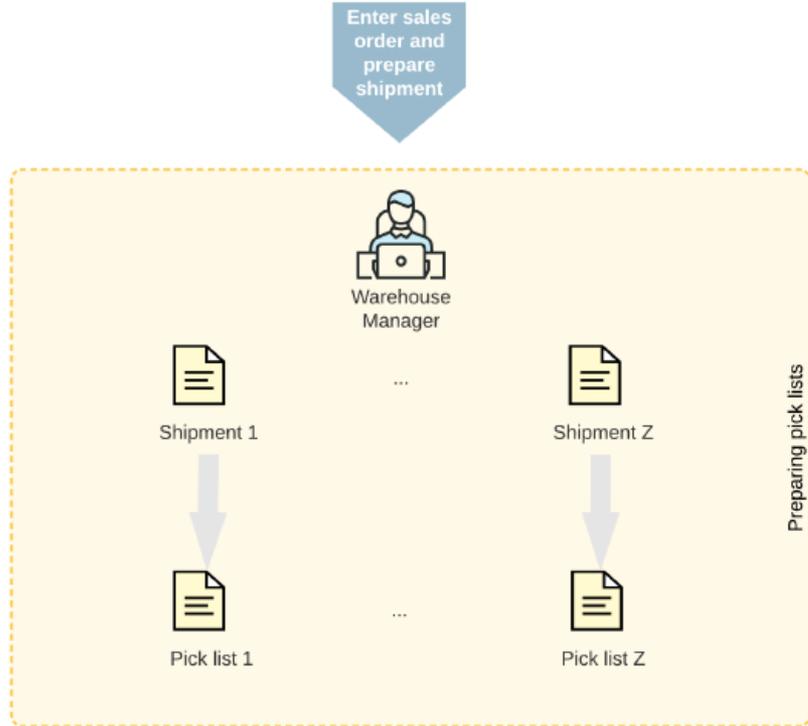
Lesson 11: Automated Fulfilling Orders with Paperless Picking

Learning Objectives

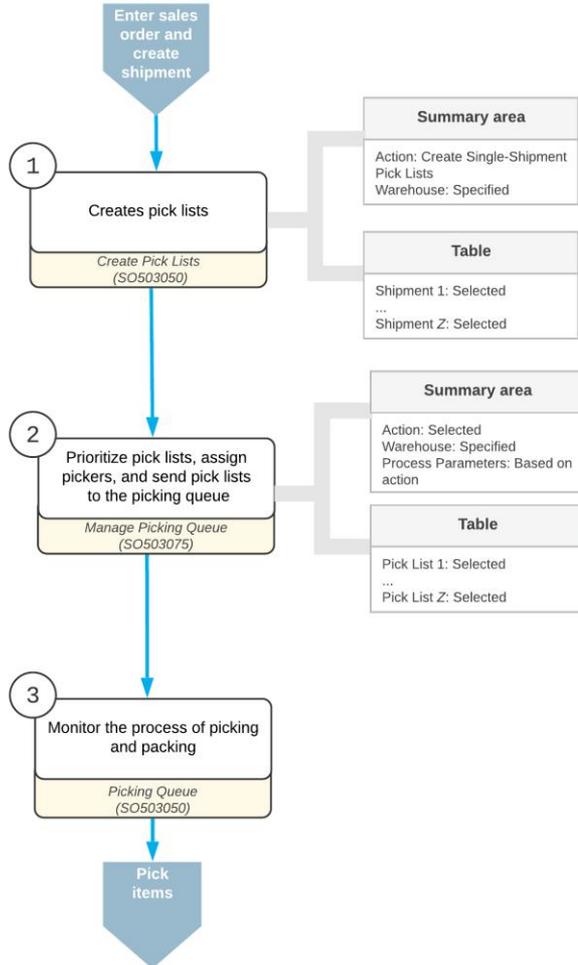
In this chapter, you will learn how to do the following:

- Create pick lists
- Change the priority of pick lists
- Assign pick lists to pickers
- Pick and pack items without printing a pick list
- Confirm the shipment after packing the items

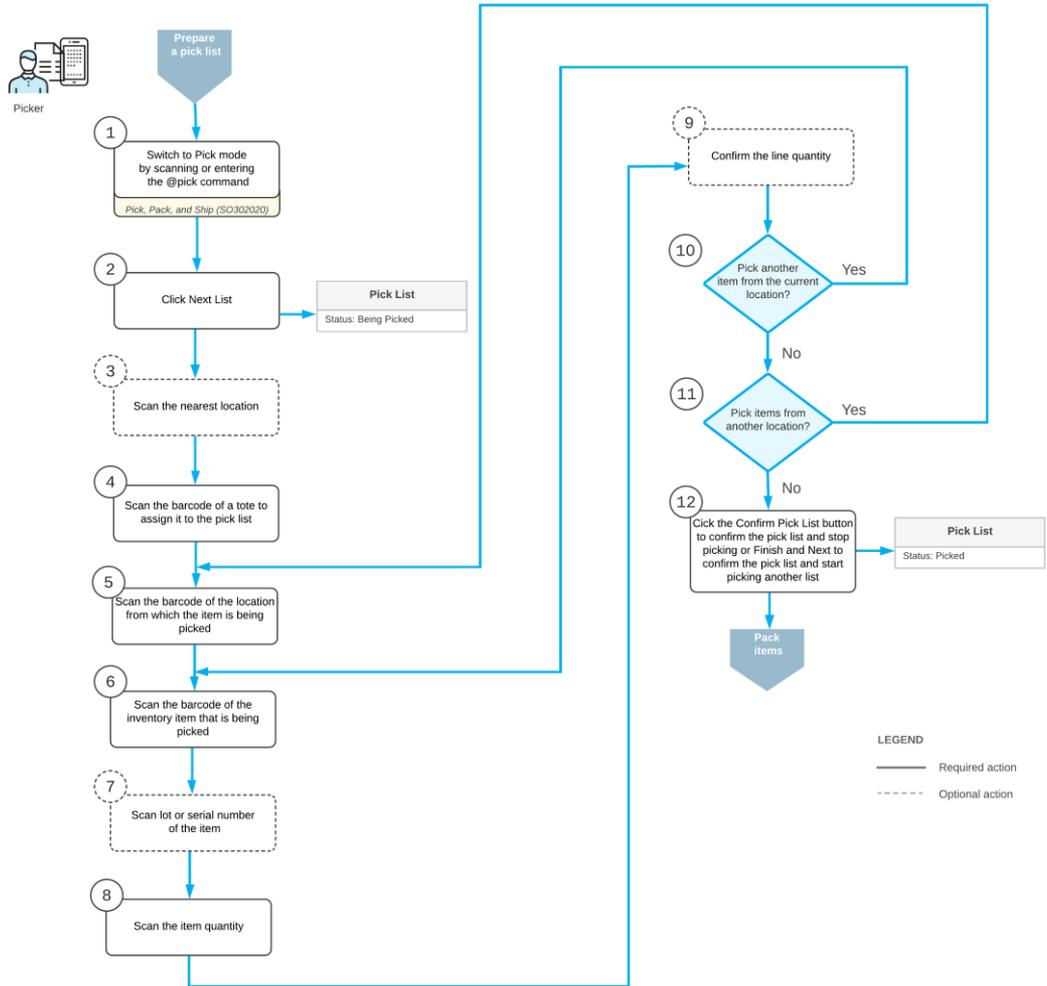
Paperless picking process



Preparation of single-shipment pick lists for paperless picking



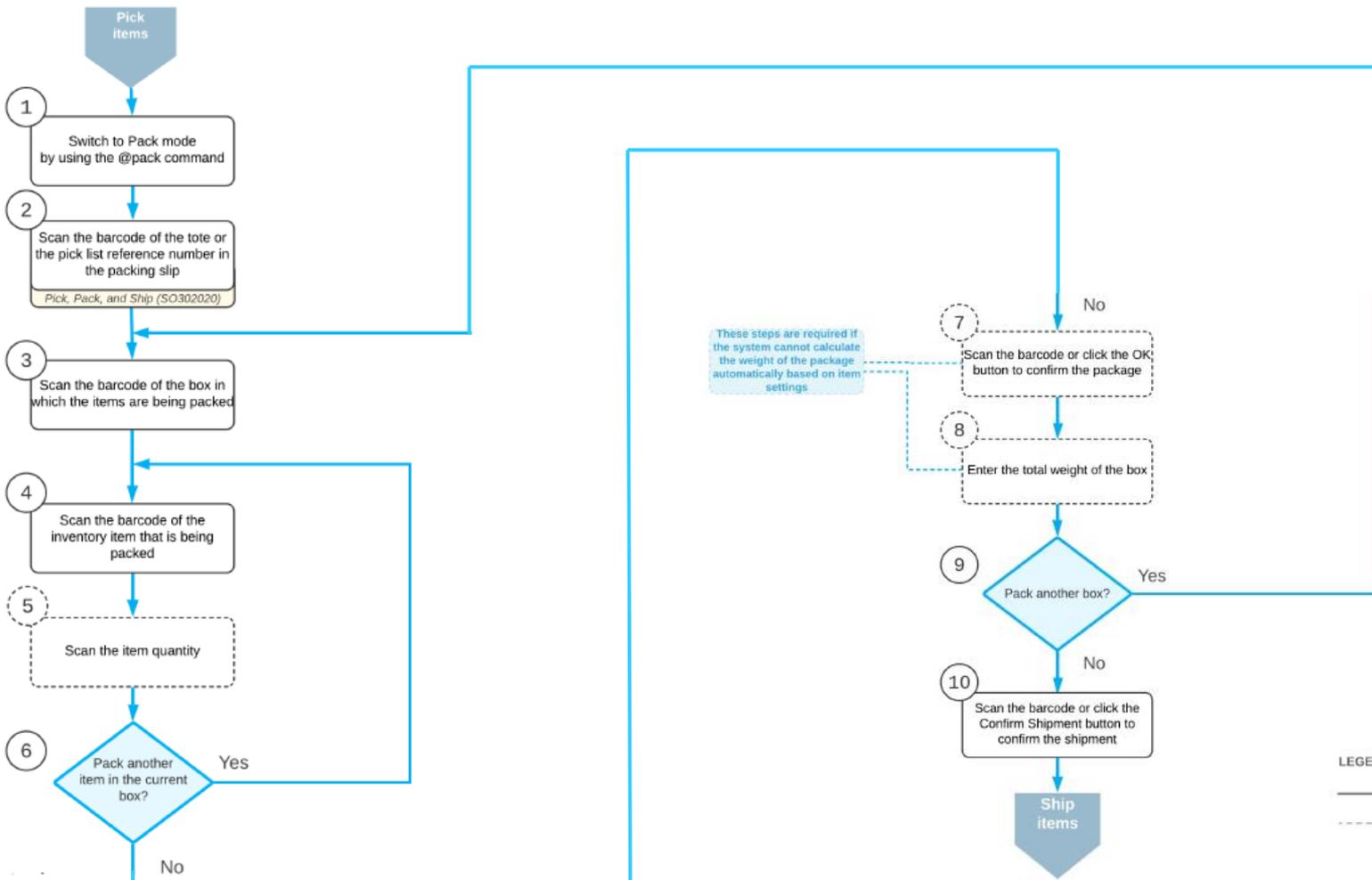
Paperless picking of items



Packing of items after paperless picking



Packer



Paperless Picking: Process Activity

Story

Suppose that in the wholesale warehouse of SweetLife three shipments require shipping. Two of the shipments are the urgent ones, and the warehouse manager wants to assign picking of these shipments to a picker who picks items faster than any other picker in the warehouse. The third shipment can be picked by any warehouse worker.

Figure: Packing details for the shipment

Shipments

000060 - FourStar Coffee & Sweets Shop

← 🖨️ 📄 ↺ + 🗑️ ⏪ < > ⏩ **PREPARE INVOICE** UPDATE IN ...

Shipment Nbr.:	<input type="text" value="000060"/>	Customer:	COFFEESHOP - FourStar Coffee & Sweets	Shipped Quant...	5.00
Type:	Shipment	Location:	MAIN - Primary Location	Control Quantity:	5.00
Status:	Confirmed	Warehouse ID:	WHOLESALE - Wholesale Warehouse	Shipped Weight:	14.200000
Operation:	Issue	Workgroup:		Shipped Volume:	14.200000
Shipment Date:	1/30/2022	Owner:		Packages:	1
				Package Weight:	14.250000

Description:

DETAILS ORDERS SHIPPING **PACKAGES**

🔄 + × |←| |

☑️	☑️	☑️	☑️	☑️	☑️	☑️	☑️	☑️	☑️
Confirm	* Box ID	Type	Description	Weight	UOM	Declared Value	C.O.D. Amount		
<input checked="" type="checkbox"/>	LARGE	Manual		14.2500	KG	0.0000	0.0000		

Contents of Selected Package

🔄 + × |←| |

☑️	☑️	☑️	☑️	☑️
Shipmer Split Line Nbr.	Inventory ID	UOM	Quantity	
3	ORJAM96	PIECE	5.00	

No Reliance

This document is subject to change without notice. Acumatica cannot guarantee completion of any future products or program features/enhancements described in this document, and no reliance should be placed on their availability.

Confidentiality: This document, including any files contained herein, is confidential information of Acumatica and should not be disclosed to third parties.



Thank you

David Gutman