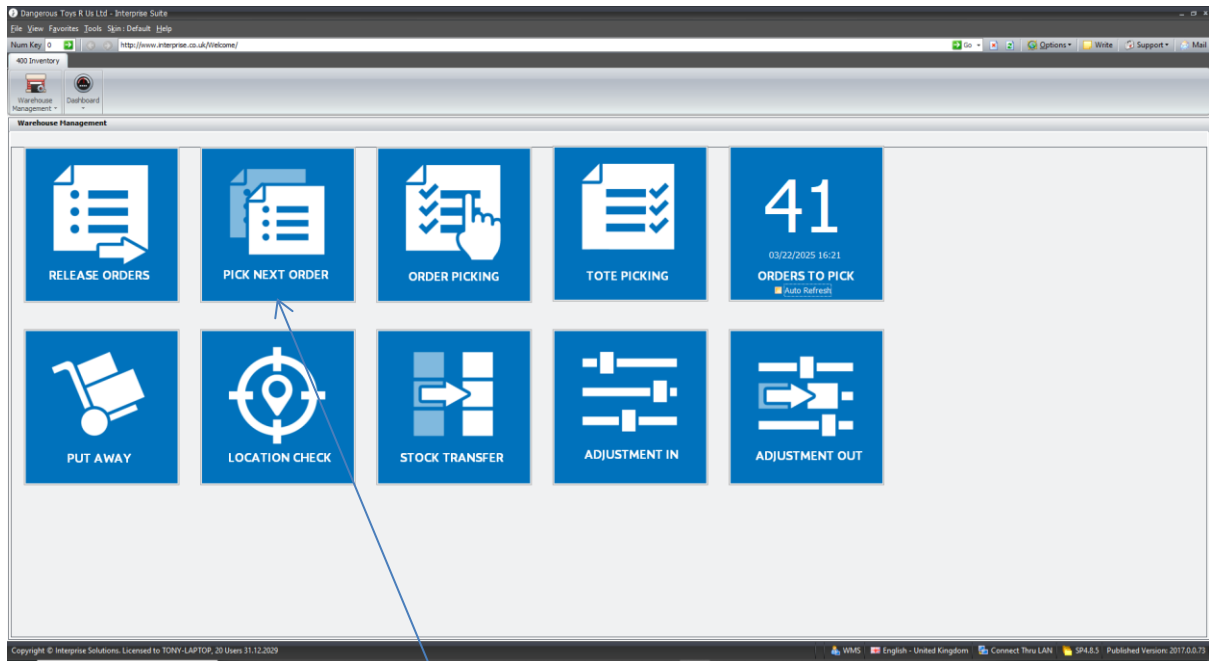




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Digital Picking

WMS Dashboard & User Role



On a touch screen Windows tablet device the user can use the WMS dashboard buttons above to pick etc.

A basic picker might just have Pick Next Order. Which options a picker sees is based on their user role. A "WMS" user role installs with the plugin to make this easy to do.

The Interprise WMS plugin is designed to work on a 10" or 12" Surface Windows Tablet Device or similar attached to a trolley or handheld and a blue tooth scanner pistol maybe hanging around the pickers neck with wifi access. Some devices like the Zebra tablet have a built in scanner.

The computer will make a PING sound if there are orders to pick.

Picking Notes

How you pick is usually dependant on your product type and order volumes. If products are bulky or weigh a lot this will decide if you use a trolley, a basket or a pallet truck etc.

The qty of items lines and qty of units you usually get on a sales orders can also decide how you pick. If you have lots of single item line orders then you may (if no weight or volume issue) pick multiple sales orders and then split them up in a packing area. If you get 5+ item lines then you may pick 1 sales order at a time.

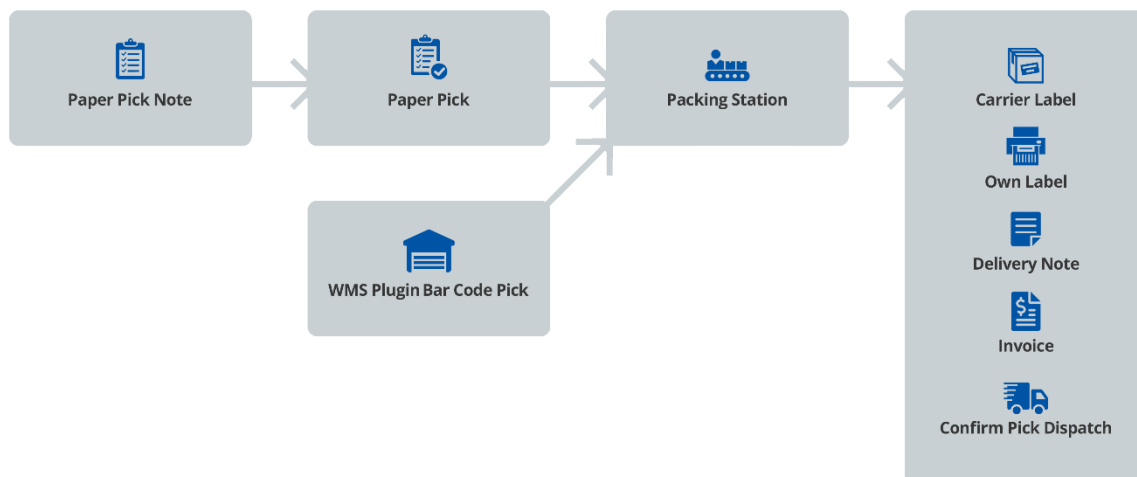
You may want to scan every item to confirm it's the right one or you may scan 1 and then just put the same items in the trolley manually counting them.

You may need batch or serial traceability on items. So this requires the batch or serial information on the item.

Do some items not have bar codes on them? This means the picker needs to be able to confirm them as easily as scanning a bar code.

Do you print a pick note, packing note or a label to go with the order items. Do you want to pick multiple orders into a box or totes on a trolley as you go?

Do you have pickers and separate packers? So pickers bring the goods to the packing area and leave a packer to check the order? Or maybe just pack separately to picking.



Example Procedure 1 Paper Pick Note. The paper pick note would be in route/location order. Maybe a consolidated paper pick note for picking multiple orders at same time. Then the picker comes back to a packing station and based on shipping method print optionally carrier label, own delivery, delivery note etc. Confirm pick to Invoice can also be done at the same time or later by accounts.

The packing station would likely be a PC with a label printer and laser printer. Maybe some scales to confirm the weight of the package. The packing station is a feature of the carrier own delivery integration plugin.



Example Procedure 2 Digital Pick Note. This is where you use a Windows table device like the paper pick note. Maybe you print labels before picking. You can pick 1 order at a time or multiple orders and bring items back to a packing area and split up the orders or pick to boxes (tote picking) on the trolley. The advantage of scanning items is pick quality should improve.

With the digital pick note you have the option to save and close so the packing station operates like it would with a paper pick note. A picker drops the box at the packing area and then the picker or packer scans or enters the SO code to confirm using the packing PC which depending on the shipping method prints labels, delivery note etc. the Qty to Confirm will be updated already by the WMS picked qty saving the packer time.

Release Orders for Picking.

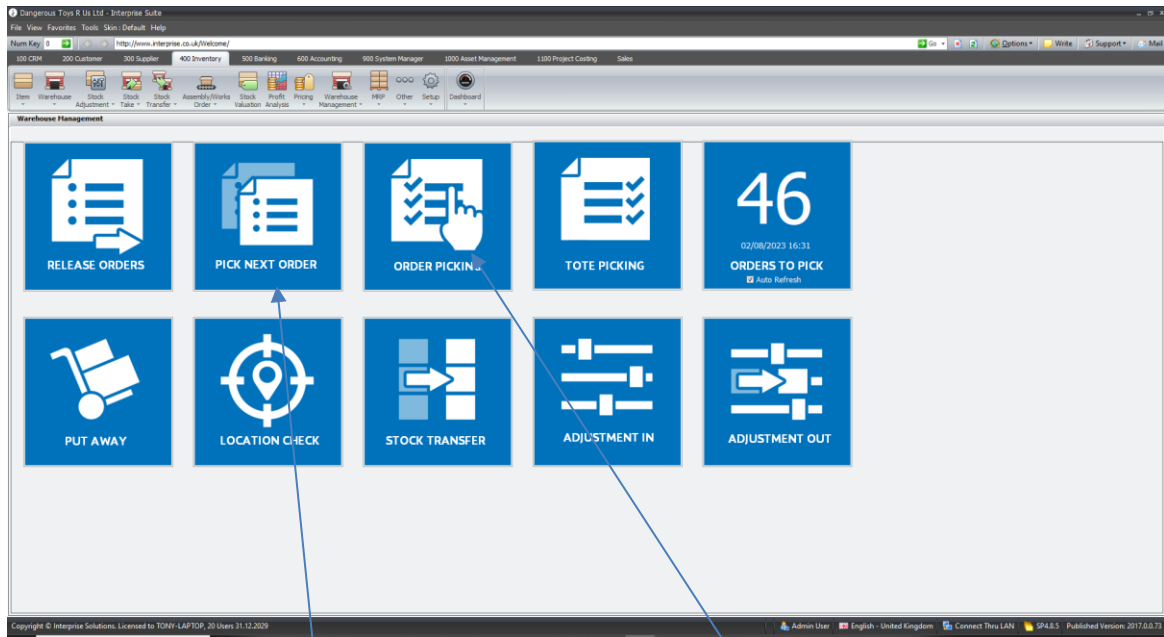
Select	Sales Order	A/Qty Item Lines	A/Qty Units	A/Weight	A/Volume	A/Base Va...	Ov Due Date	Ship Date	Customer Name
Warehouse: London									
<input type="checkbox"/>	SO-000154	2	2	1	0	224	25/09/2019	25/09/2019	A Toy Customer UK Ltd
<input type="checkbox"/>	SO-000155	2	3	2	0	249	25/09/2019	25/09/2019	A Toy Customer UK Ltd
Warehouse: Main Warehouse									
<input checked="" type="checkbox"/>	BKO-000046-1	1	3	0	0	0	21/02/2018	21/02/2018	A Toy Customer UK Ltd
<input checked="" type="checkbox"/>	BKO-000053-1	1	1	1	0	27	18/04/2018	18/04/2018	A Toy Customer UK Ltd
<input checked="" type="checkbox"/>	BKO-000091-1	1	1	1	0	27	02/11/2018	02/11/2018	A Toy Customer UK Ltd
<input checked="" type="checkbox"/>	BKO-000279-1	2	12	5	0	1,518	23/03/2022	23/03/2022	A Toy Customer UK Ltd
<input type="checkbox"/>	SO-000020	2	4	0	0	400	02/11/2017	02/11/2017	A Toy Customer UK Ltd
<input type="checkbox"/>	SO-000035	2	2	0	0	399	14/12/2017	14/12/2017	A Toy Customer UK Ltd
<input type="checkbox"/>	SO-000038	2	2	1	0	226	11/01/2018	11/01/2018	A Toy Customer UK Ltd
<input type="checkbox"/>	SO-000042	2	2	1	0	237	19/02/2018	19/02/2018	A Toy Customer UK Ltd
<input type="checkbox"/>	SO-000043	1	4	4	0	108	19/02/2018	19/02/2018	A Toy Customer UK Ltd
Selected Total		3	3	5	2	0	54		

The user can print a pick note which moves the order status on or you can release orders for picking using the Release Orders feature without printing a pick note to make them ready to pick in the WMS.

This print picking note status step can be taken out if required. It's a step to confirm which orders to pick maybe by due date or just fully allocated rather than make all sales order ready to pick. It's a way to control which orders get picked. If you know you can pick 100 orders per day and have 500 outstanding orders it allows you to decide a priority. In setup the allocated orders tab above can be based on fully or partially allocated orders.



Sales Order Picking / Digital Pick Note



A picker can use pick next order to pick and this will show the next order to pick.

Or if their user role allows the user can pick from a list via order picking like below. The advantage of the later is that it allows the picker to select multiple sales orders at once (or one at a time) and then separate them on the trolley or in a packing area. You could also use a pick note or label and scan the SO code into the field to pick it.

Orders to Pick

Sales Order: Fully Allocated Orders Only Max Weight: Max Volume: Auto Select

Select	Sales Order	A/Qty Item Lines	A/Qty Units	A/Weight	A/Volume	A/Base Value	Ov Due Date	Ship Date	Customer Name
<input type="checkbox"/>	SO-000286	2	2	0	0	400	06/05/2022	06/05/2022	ABC Toy Company Ltd
<input type="checkbox"/>	SO-000287	3	4	2	0	260	06/05/2022	06/05/2022	Arden Cycles
<input type="checkbox"/>	SO-000288	3	5	1	0	230	06/05/2022	06/05/2022	ABC Toy Company Ltd
<input type="checkbox"/>	SO-000290	3	5	1	0	365	10/05/2022	10/05/2022	A Toy Customer UK ...
<input type="checkbox"/>	SO-000291	2	2	1	0	230	10/05/2022	10/05/2022	ABC Toy Company Ltd
<input type="checkbox"/>	SO-000293	4	5	2	0	649	13/05/2022	13/05/2022	A Toy Customer UK ...
<input type="checkbox"/>	SO-000300	2	4	3	0	274	20/07/2022	20/07/2022	A Toy Customer UK ...
<input type="checkbox"/>	SO-000309	2	11	10	0	449	15/08/2022	15/08/2022	A Toy Customer UK ...
<input type="checkbox"/>	SO-000328	2	2	1	0	230	28/11/2022	28/11/2022	Arden Cycles
<input type="checkbox"/>	SO-000329	3	13	1	0	1,045	28/11/2022	28/11/2022	A Toy Customer UK ...
<input type="checkbox"/>	SO-000331	2	3	1	0	430	29/11/2022	29/11/2022	Arden Cycles
<input type="checkbox"/>	SO-000343	4	4	1	0	430	02/12/2022	02/12/2022	Bike Brothers
<input type="checkbox"/>	SO-000344	3	3	1	0	624	02/12/2022	02/12/2022	A Toy Customer UK ...
Selected Total		1	3	3	1	0	624		

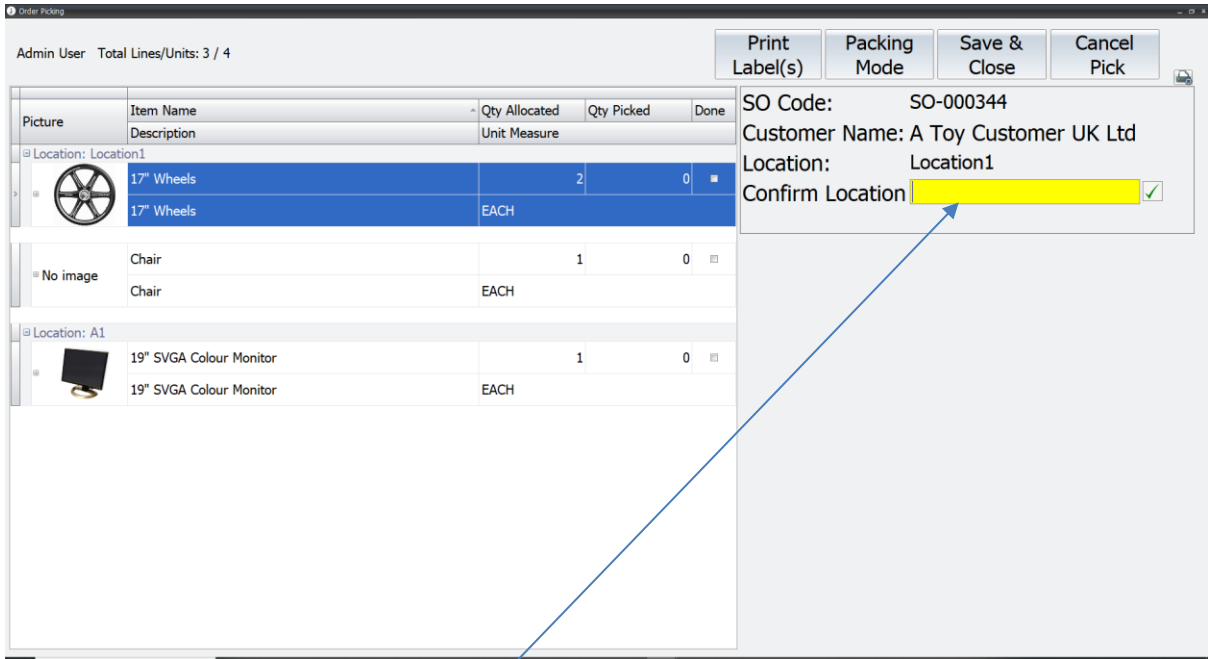
In Picking: Yes

OK Cancel

The user can see the ready to pick orders, the allocated qty of item lines, the allocated qty of units, the allocated weight/volume, so has a better idea of how many they could pick in one go. i.e. what will fit on their trolley. By entering a Max weight and Volume it can auto select orders from top down that don't overload the trolley. This is saved for this user so next time they don't have to enter it.



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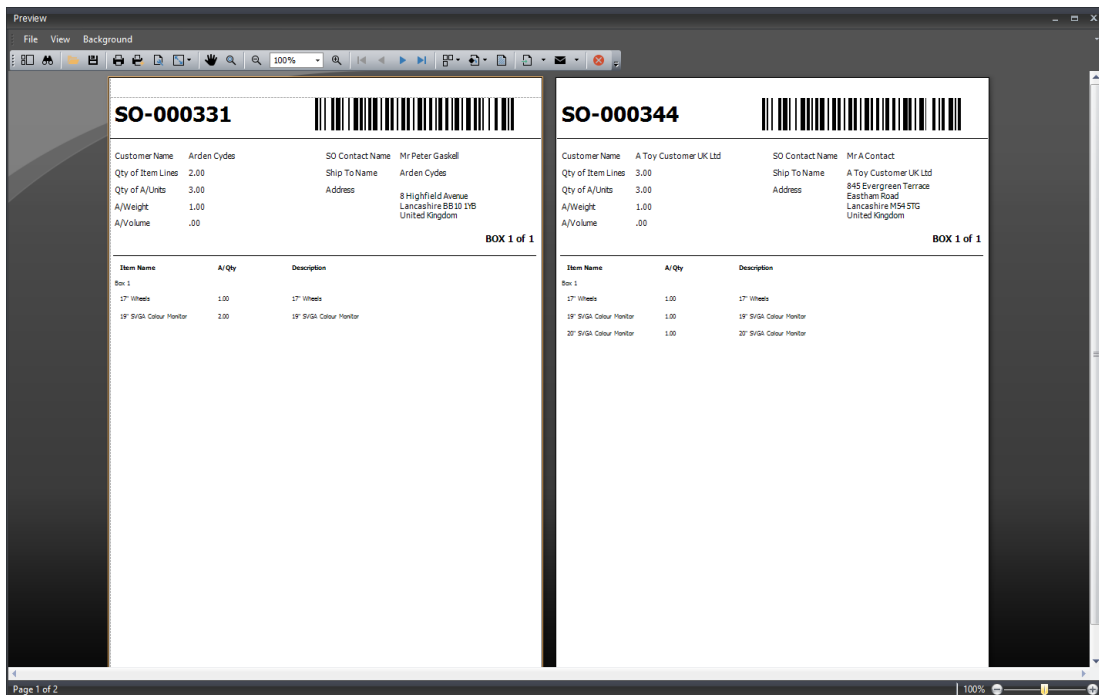


The above is the digital pick note or picking interface.

It sorts items by route then bin. It asks me to confirm the location if the setup option is chosen. If you want to confirm location but not have to scan it then there is a tick box to move past it.

The picker should focus on the right hand side of the screen as this will drive the picker what to do next. The left is a summary of all the item lines we are about to pick.

If you wanted to sort the items into boxes on the trolley the SO Code is displayed for each item line being picked or you could use the Tote picking feature. The print labels button will print labels for the chosen orders like below:





Pick Mode

Picture	Item Name	Qty Allocated	Qty Picked	Done
Location: Location1				
	17" Wheels	2	0	
	17" Wheels	EACH		
Location: A1				
	Chair	1	0	
	Chair	EACH		
	19" SVGA Colour Monitor	1	0	
	19" SVGA Colour Monitor	EACH		

Admin User Total Lines/Units: 3 / 4

Print Label(s) Packing Mode Save & Close Cancel Pick

SO Code: SO-000344
Customer Name: A Toy Customer UK Ltd
Location: Location1

Item Name: 17" Wheels
UPC Code: 234
17" Wheels

Qty Left to Pick: 2 EACH
Scan Item: [Yellow field]

Done [-1] Qty Picked = Qty Allocated [+1]


Pick mode displays the item lines in Route/Location Order.

It is a setting to make the picker scan the location. After you scan or enter the item you can keep scanning +1 or just hit the "Qty Picked = Qty Allocated" button to confirm you picked all the allocated qty. i.e. you don't need to scan any. You can also use the Left and Right arrow buttons to -1 or +1 qty. You can also click the Qty Picked field in the list and enter the qty.



Order Picking

Admin User Total Lines/Units: 3 / 8

Picture	Item Name	Qty Allocated	Qty Picked	Done
Location: Location1				
	17" Wheels	2	2	<input checked="" type="checkbox"/>
	17" Wheels	EACH		
No image	TP Serial	3	0	<input type="checkbox"/>
	TP Serial	EACH		
Location: A2				
No image	TP Batch	3	0	<input type="checkbox"/>
	TP Batch	EACH		

Print Label(s) Packing Mode Save & Close Cancel Pick

SO Code: SO-000483
Customer Name: A Toy Customer UK Ltd
Location: Location1

Item Name: TP Serial
UPC Code: S1
TP Serial

Qty Left to Pick: 3 EACH

Done Qty Picked = Qty Allocated

Scan Batch/Serial:

Done Next Item

If the item is batch or serial it would ask for this after scanning the UPC code. If the batch or serials are already assigned on the sales order then it will ask the picker to pick those batches or they can pick scan any. The Qty Picked = Allocated button will enter the allocated qty of a batch to save having to scan them.

There is also a LOCK button which allows a user to just scan serials or batches instead of having to scan the UPC code then the serial batch.



Order Picking

Admin User Total Lines/Units: 4 / 5

Print Label(s) Packing Mode Save & Close Cancel Pick

Picture	Item Name	Qty Allocated	Qty Picked	Done
Location: A1				
	19" SVGA Colour Monitor	1	1	<input checked="" type="checkbox"/>
	19" SVGA Colour Monitor			
	Unit Measure	EACH		
	2GBRAM	1	1	<input checked="" type="checkbox"/>
	2GBRAM			
	Unit Measure	EACH		
Location: A2				
No image	TP Batch	1	0	<input type="checkbox"/>
	TP Batch			
	Unit Measure	EACH		
	Batch/Serial No	Qty Allocated	Qty Picked	Done
	888	1	0	<input type="checkbox"/>
Location: A3				
	20" SVGA Colour Monitor	2	0	<input type="checkbox"/>
	20" SVGA Colour Monitor			
	Unit Measure	EACH		

SO Code: SO-000451
 Customer Name: A Toy Customer UK Ltd
 Location: A2
 Item Name: TP Batch
 UPC Code: B1
 TP Batch

Qty Left to Pick: 1 EACH
 Scan Item: (01)B1(10)888

Done Qty Picked = Qty Allocated

There is also the option to scan GS1 QR Barcodes that contain the (01)UPC(21)Serial(10)Batch(17)ExpiryDate(30)Qty all in one go. The QR could just consist of the UPC and Batch etc.

Field	Identifier
EAN or UPC Code	(01)
Batch	(10)
Serial	(21)
Use By Date	(17) Format YYYYMMDD
Qty Variable Count	(30)

We expect most users will have a separate packing station PC(s) linked to label printer, laser printer, etc. and pack the order from here whether the picker also packs or not. So the picker puts the items/box at the packing station and save and closes.

Save & Close saves the Picked Qty = Qty to Confirm in the Packing station and leaves the order in picking so it is not picked again. Cancel leaves the order so it can be picked again.

Carrier Integration

Home Num Key 0

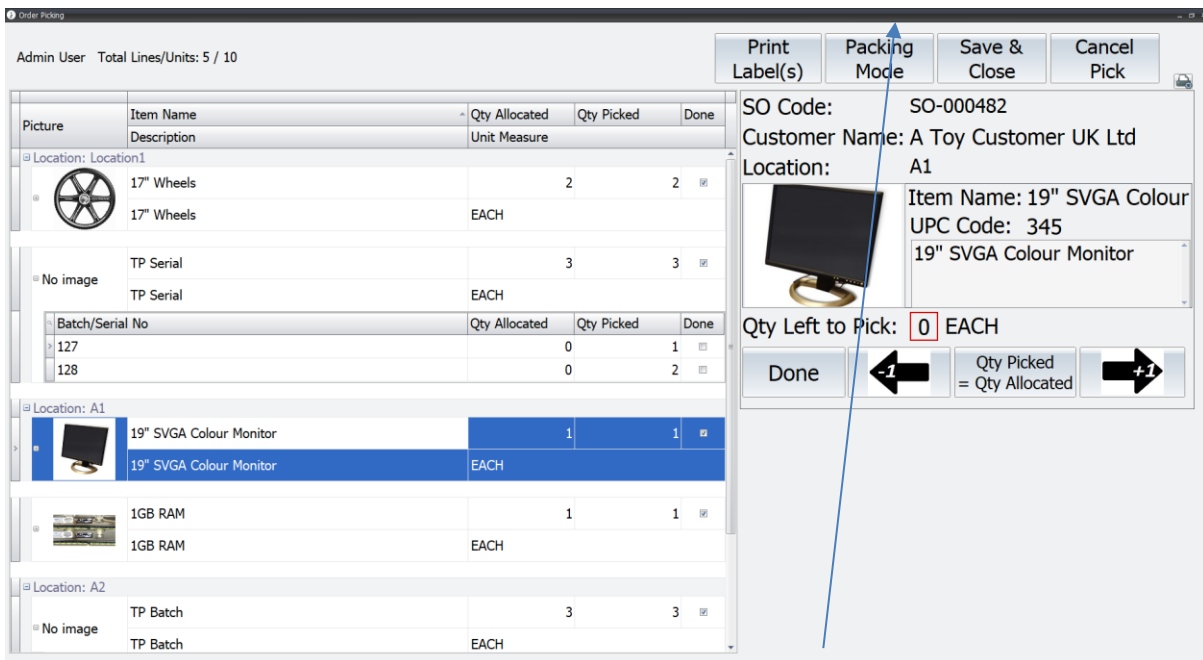
Process Clear Close



Sales Order: SO-000344 Warehouse Filter: MAIN Order Status: Ready To Invoice

Select	Sales Order	Date	Alloc Weight	Tot Weight	No. Boxes	Shipping Method	Customer Code	Customer Name	Total	Currency	Ref 1	Ref 2
<input checked="" type="checkbox"/>	SO-000344	02/12/2022	1.00	1.00	1.00	Standard Delivery Charge	CUST-000001	A Toy Customer U...	857.99	GBP		

Item Name	Item Description	Is Drop Ship	Qty Ordered	Quantity Allocated	Quantity To Confirm
17" Wheels	17" Wheels	<input type="checkbox"/>	1.00	1.00	1.00
19" SVGA Colour Monitor	19" SVGA Colour Monitor	<input type="checkbox"/>	1.00	1.00	1.00
1GB RAM	1GB RAM	<input checked="" type="checkbox"/>	1.00	1.00	1.00
20" SVGA Colour Monitor	20" SVGA Colour Monitor	<input type="checkbox"/>	1.00	1.00	1.00

Packing Mode – Optional



Picture	Item Name Description	Qty Allocated	Qty Picked	Done
Location: Location1				
	17" Wheels	2	2	<input checked="" type="checkbox"/>
	17" Wheels			
	EACH			
Location: A1				
	19" SVGA Colour Monitor	1	1	<input checked="" type="checkbox"/>
	19" SVGA Colour Monitor			
	EACH			
Location: A2				
	TP Batch	3	3	<input checked="" type="checkbox"/>
	TP Batch			
	EACH			

Admin User Total Lines/Units: 5 / 10

Print Label(s) Packing Mode Save & Close Cancel Pick

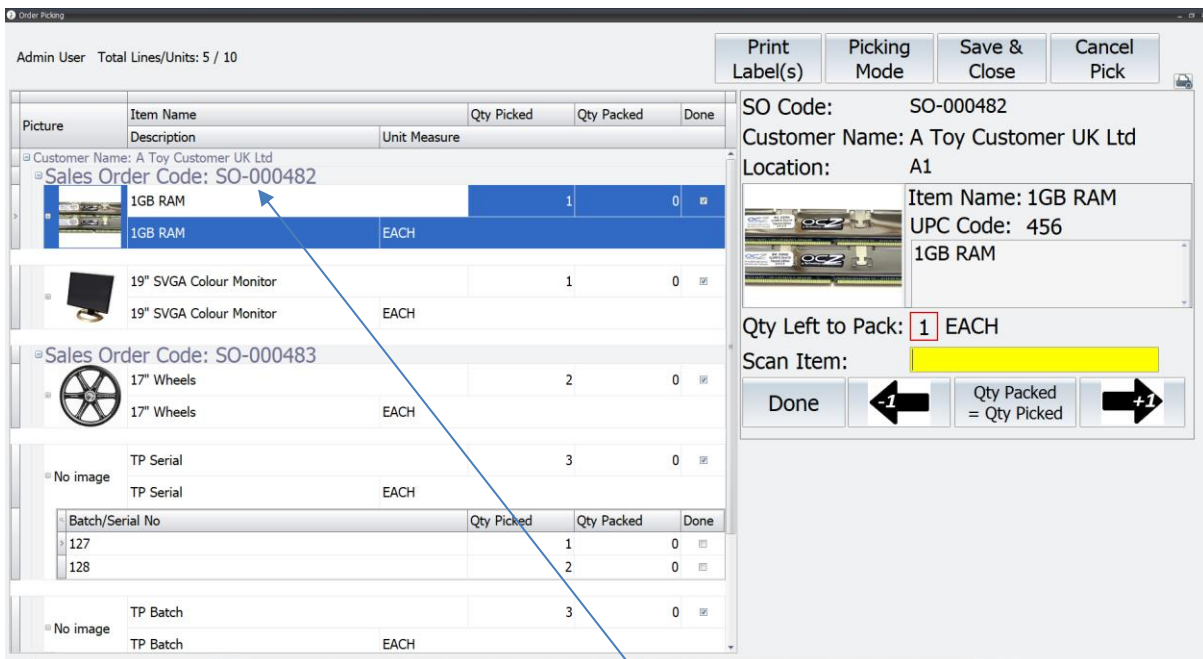
SO Code: SO-000482
Customer Name: A Toy Customer UK Ltd
Location: A1



Item Name: 19" SVGA Colour
UPC Code: 345
19" SVGA Colour Monitor

Qty Left to Pick: 0 EACH

Done Qty Picked = Qty Allocated

When you have picked the items you can click the packing mode button.



Picture	Item Name Description	Unit Measure	Qty Picked	Qty Picked	Done
Customer Name: A Toy Customer UK Ltd					
Sales Order Code: SO-000482					
	1GB RAM		1	0	<input type="checkbox"/>
	1GB RAM	EACH			
Sales Order Code: SO-000483					
	17" Wheels		2	0	<input type="checkbox"/>
	17" Wheels	EACH			
Location: A1					
	TP Serial		3	0	<input type="checkbox"/>
	TP Serial	EACH			
Location: A2					
	TP Batch		3	0	<input type="checkbox"/>
	TP Batch	EACH			

Admin User Total Lines/Units: 5 / 10

Print Label(s) Picking Mode Save & Close Cancel Pick

SO Code: SO-000482
Customer Name: A Toy Customer UK Ltd
Location: A1

Item Name: 1GB RAM
UPC Code: 456
1GB RAM

Qty Left to Pack: 1 EACH

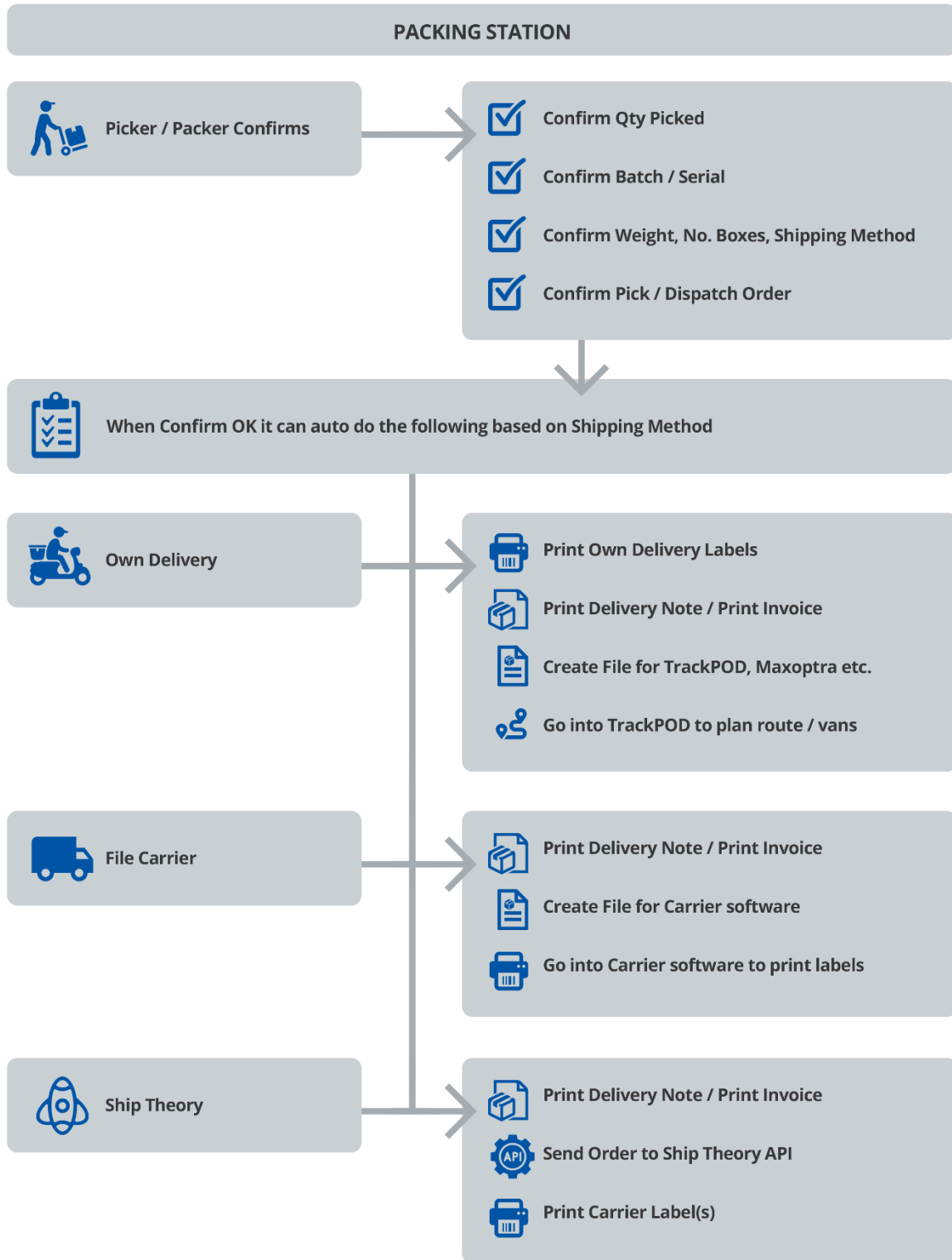
Scan Item:

Done Qty Picked = Qty Picked

Packing mode displays the item lines grouped by customer order. You can scan the items again or enter the qty or use the confirm qty picked "Qty Picked = Qty Picked" button. If picking multiple sales orders this is what can help you split up the items by sales order.



[See the Carrier Integration / Packing Station Documentation.](#) Workflow below:

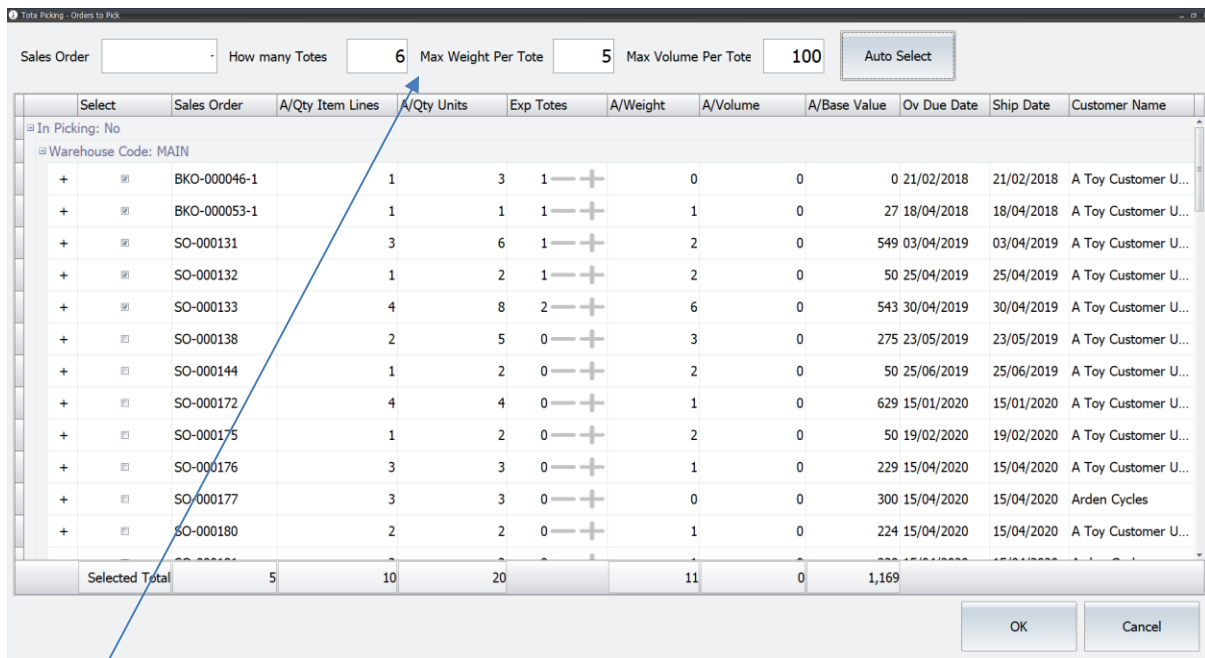


Tote (Cluster) Picking

An example of Tote picking is a picker having a trolley with maybe 6 boxes or bins on it. So weight and volume allowing we could pick 6 sales orders at once and split the items up at pick into the correct sales order box.

The issue with Tote picking is when the number of items on an order require another Tote box. i.e. they don't all fit into the box. Tote picking in some systems can use media with its own ID Code but we are simplifying it here by using sales order code.

Media with its own ID Code has the advantage of just adding another as you go i.e. if one fills up you use another. However, if you only have 6 totes boxes on your trolley and you are already picking 6 orders you are stuck as you cannot simply add another. So here the weight, volume, qty of items etc will help you identify that you need more than 1 tote for an order at the time of deciding which orders to pick this time.

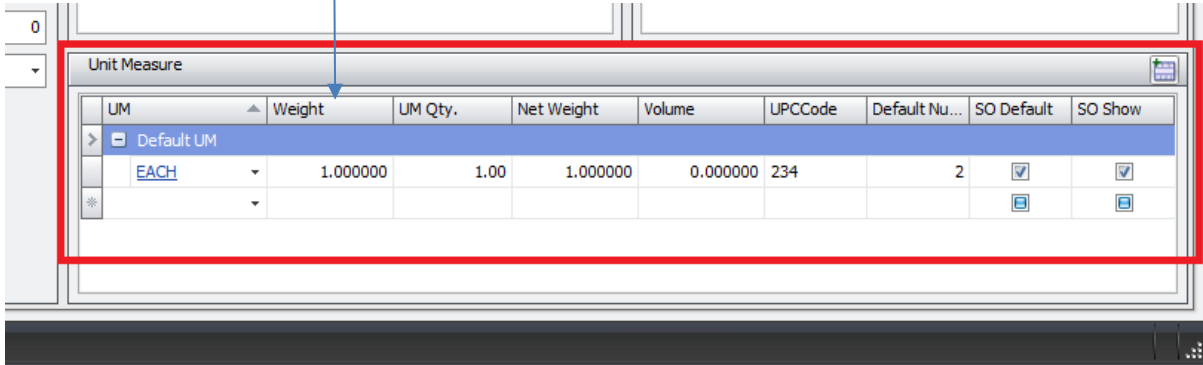


Select	Sales Order	A/Qty Item Lines	A/Qty Units	Exp Totes	A/Weight	A/Volume	A/Base Value	Ov Due Date	Ship Date	Customer Name
+ <input checked="" type="checkbox"/>	BKO-000046-1	1	3	1	0	0	0	21/02/2018	21/02/2018	A Toy Customer U...
+ <input checked="" type="checkbox"/>	BKO-000053-1	1	1	1	1	0	27	18/04/2018	18/04/2018	A Toy Customer U...
+ <input checked="" type="checkbox"/>	SO-000131	3	6	1	2	0	549	03/04/2019	03/04/2019	A Toy Customer U...
+ <input checked="" type="checkbox"/>	SO-000132	1	2	1	2	0	50	25/04/2019	25/04/2019	A Toy Customer U...
+ <input checked="" type="checkbox"/>	SO-000133	4	8	2	6	0	543	30/04/2019	30/04/2019	A Toy Customer U...
+ <input type="checkbox"/>	SO-000138	2	5	0	3	0	275	23/05/2019	23/05/2019	A Toy Customer U...
+ <input type="checkbox"/>	SO-000144	1	2	0	2	0	50	25/06/2019	25/06/2019	A Toy Customer U...
+ <input type="checkbox"/>	SO-000172	4	4	0	1	0	629	15/01/2020	15/01/2020	A Toy Customer U...
+ <input type="checkbox"/>	SO-000175	1	2	0	2	0	50	19/02/2020	19/02/2020	A Toy Customer U...
+ <input type="checkbox"/>	SO-000176	3	3	0	1	0	229	15/04/2020	15/04/2020	A Toy Customer U...
+ <input type="checkbox"/>	SO-000177	3	3	0	0	0	300	15/04/2020	15/04/2020	Arden Cycles
+ <input type="checkbox"/>	SO-000180	2	2	0	1	0	224	15/04/2020	15/04/2020	A Toy Customer U...
Selected Total		5	10	20	11	0	1,169			

When selecting which orders to pick we have an option at the top that's asks how many Totes on your trolley and what is the max weight and volume per tote? We have an auto select option that will assign the number of Totes to the orders in the list. E.g. you have 6 Totes on your trolley, each can take 10Kg and 50 Volume. It would look at the first sales order in the list and if it was 15KG and 30 Volume it would put 2 Totes next to it. i.e. because of the 15KG compared to the 10Kg tote capacity it knows it will need 2 totes. If the sales order was 25KG and 40 Volume then 3 Tote boxes. If the sales order was 9KG and 70 Volume it would put 2 Totes this time because the volume requires more.

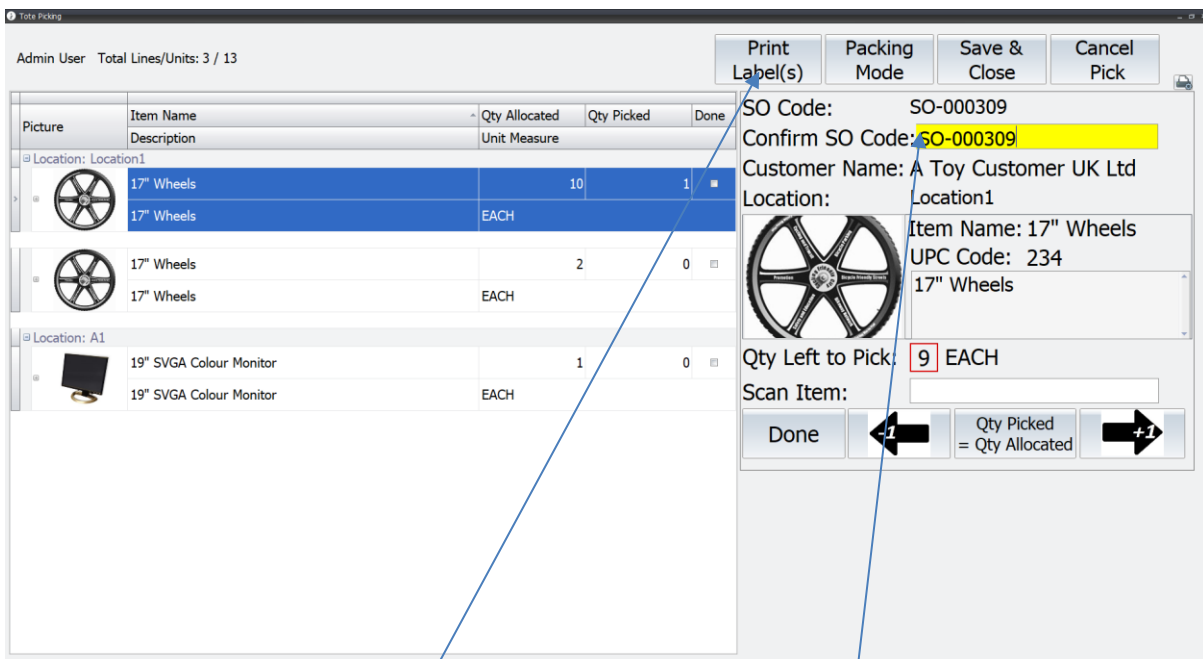


For this to work the weights and volumes need to be setup on items. All items by UM have a volume and weight. Weight is in KG. Let us assume that Volume would be done in 1 = 1cm sq. So if a tote box had a max volume of 50 that would mean 50 cm sq. If an item is volume 10 then we know we should get about 5 of them into a tote. It is not exact as different volume items will be different shapes so not fit per perfectly together.



UM	Weight	UM Qty.	Net Weight	Volume	UPCCode	Default Nu...	SO Default	SO Show
Default UM								
EACH	1.000000	1.00	1.000000	0.000000	234	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
*							<input type="checkbox"/>	<input type="checkbox"/>

The picker can select any orders manually and change the qty of totes per order as well.

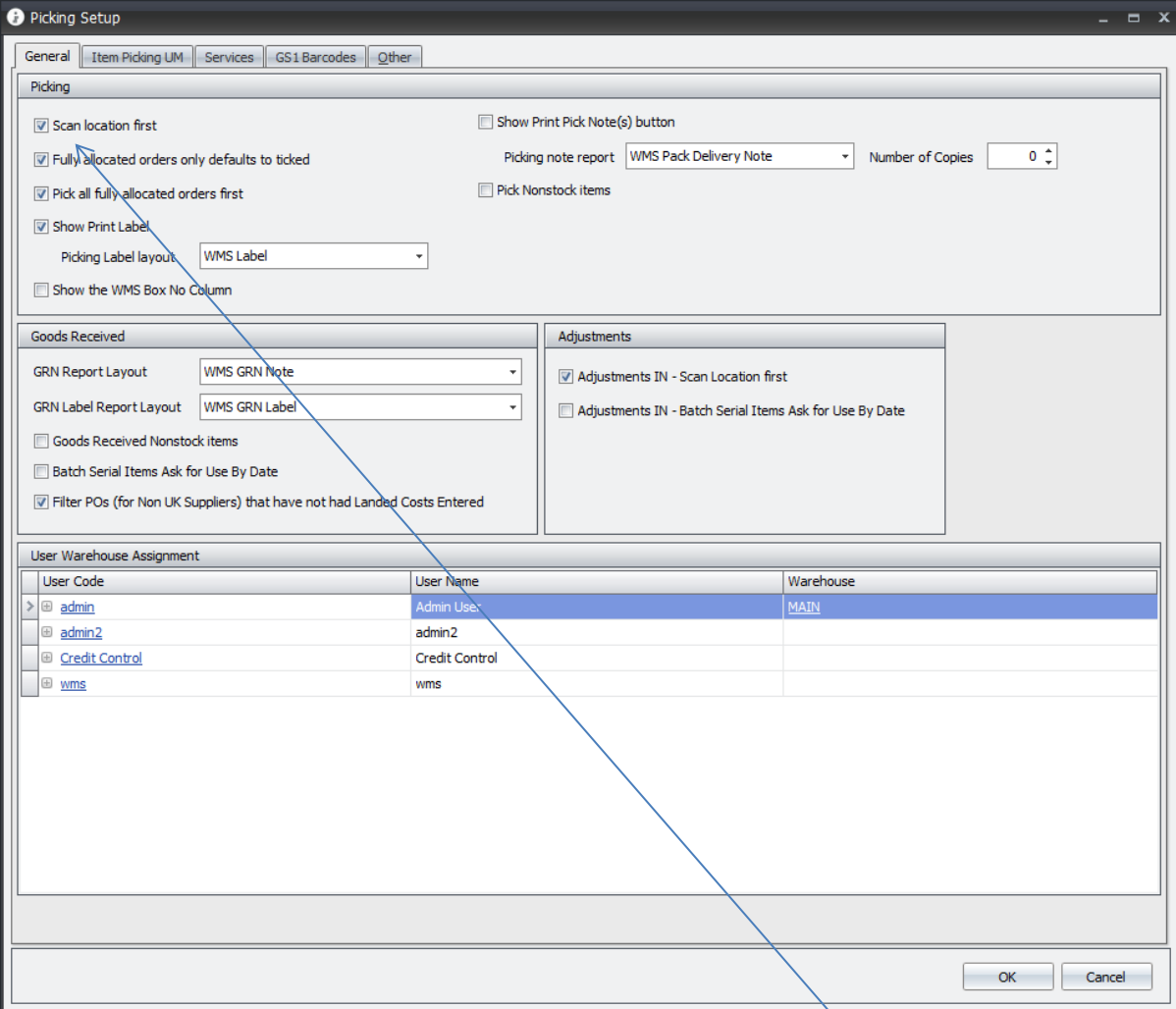


When in picking you could print labels for the orders chosen to stick on the Totes or Boxes. These have the Tote Box 1 of 1 and the SO Code in bar code to scan confirm you put things in the right box.

A procedure could be select the orders, print the labels for the tote boxes, Pick the goods putting them into the tote boxes, save and close the digital pick note, at the packing station finish the packing process printing delivery note, carrier label etc.

The tote pick process is scan the item and then confirm the tote box (SO Code) you are putting the item into which should have a label with this on. If you use the Qty Picked = Qty Allocated or +1 buttons the picker is not asked to confirm the SO code.

Setup Options



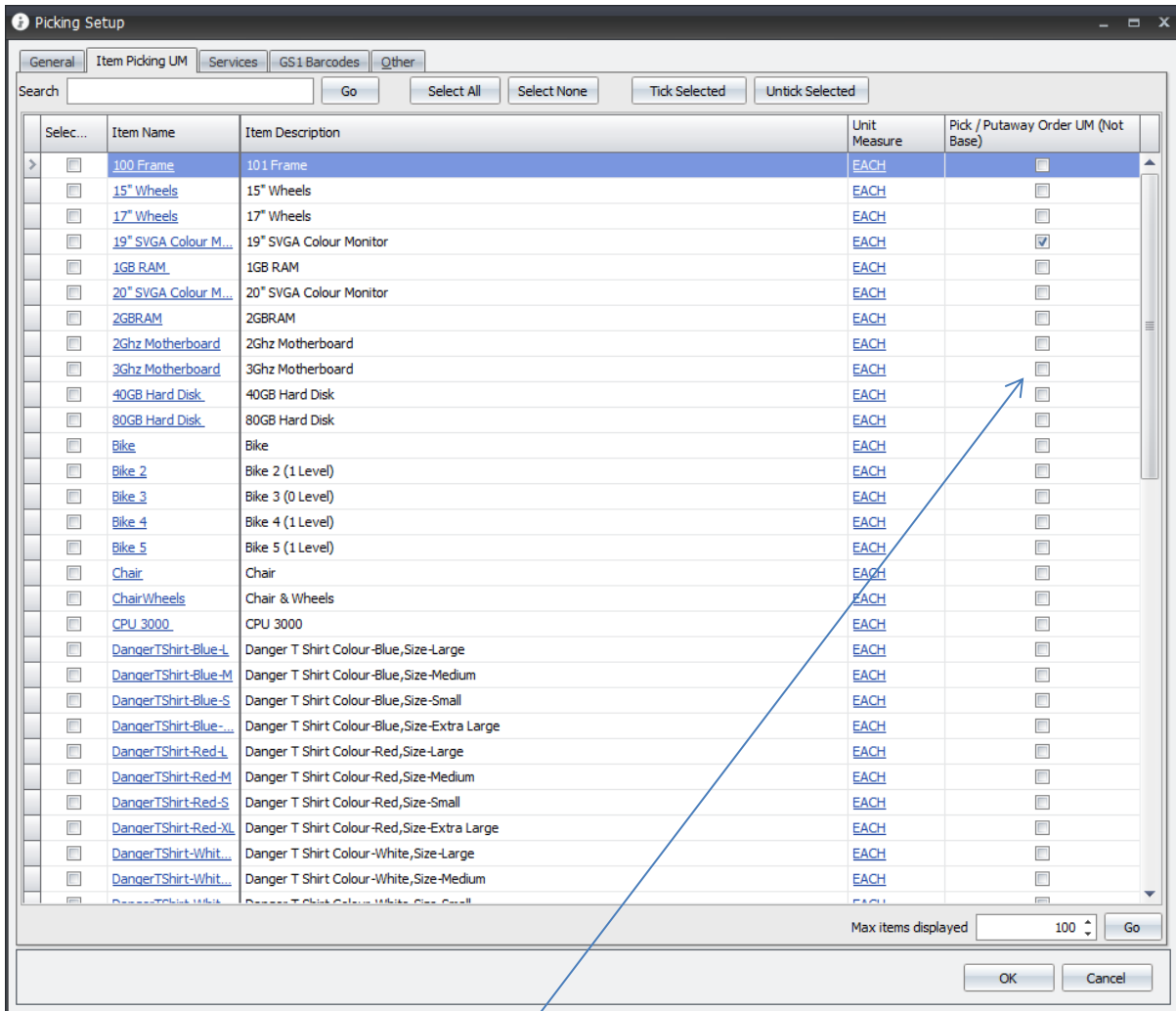
User Code	User Name	Warehouse
admin	Admin Use	MAIN
admin2	admin2	
Credit Control	Credit Control	
wms	wms	

Picking setup options ask do you want the picker to have to confirm the location before picking items at that location.

Against each username a user can default to a warehouse so it only shows that warehouse's orders or if they go to pick next order it would default to the next order for that warehouse. etc. If left blank the picker can see all orders across all warehouses.

If you display the Print labels button then you can pick the layout that will apply as it goes straight to print.

Depending on how you pick will decide which buttons you want to show on the picking form. You may or may not want to confirm pick or create an invoice/dispatch etc.

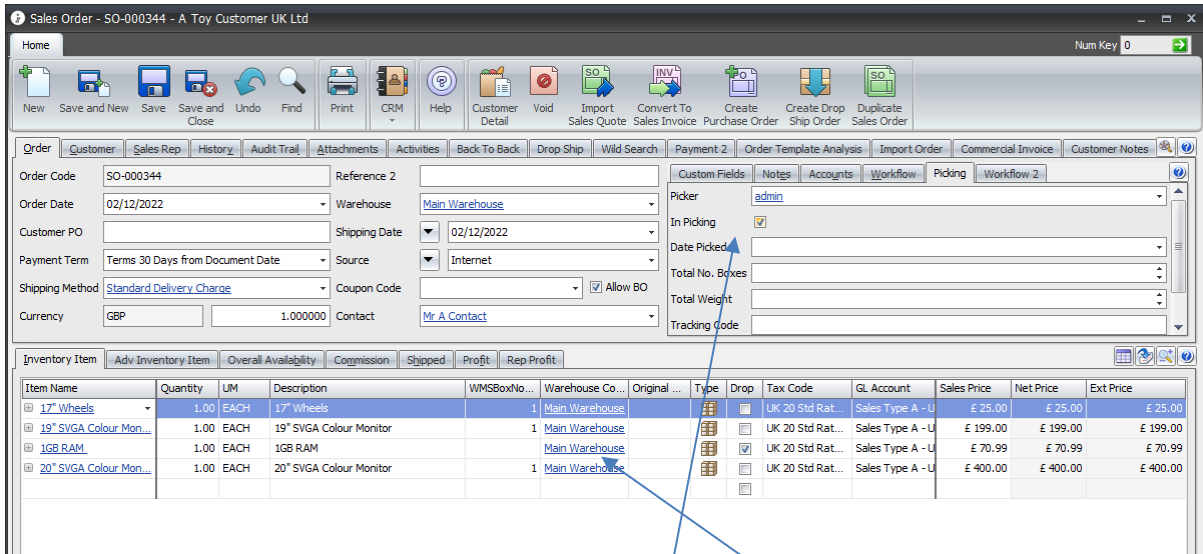


There is an Item Picking UM tab in setup.

As default picking is done in the base unit of measure. So if you sold 1 each that would be 1 to pick. If you sold 1 x UM 10 then that's 10 to pick.

The option above allows you pick in the sales order unit of measure which in this example could be Box of 10 or Each. Different Ums would have their own UPC code. NB that for serial/batch items they are always picked in the base unit of measure as they are stored by base UM.

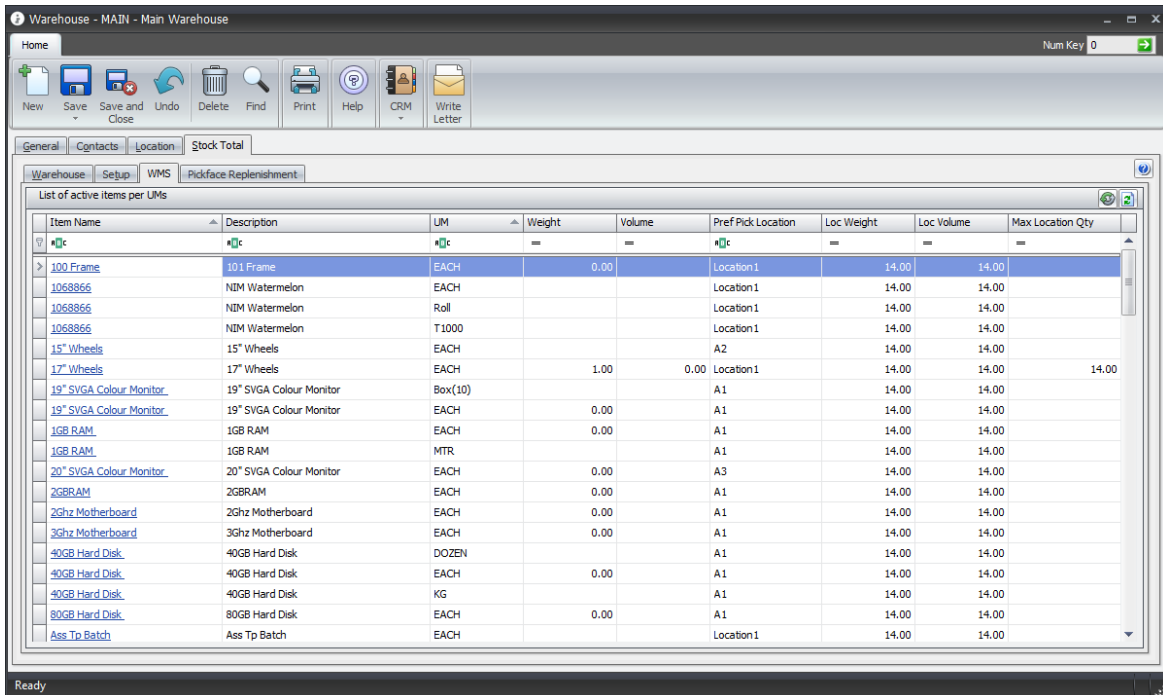
General Picking Information



When an order is in picking it is flagged as "in picking" so it cannot be chosen by another picker. i.e. if 2 pickers click get next order to pick they will get different orders as it does it in a serial sequence. When its picked the order is updated with the picker and date picked.

NB WMS Barcode Picking only allows for sales order item lines coming from one warehouse per sales order. i.e. it does not support picking for 1 sales order with different item lines coming from different warehouses.

WMS tab in Warehouse



If we enter the volume and weight for locations and items then we can calc the Pref Pick Location Max Qty. Designed to help with replenishment.