

**SOP SETTING UP WAREHOUSE
MANAGEMENT (WMS LITE)**

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TABLE OF CONTENTS

- Aim 2
- Working Assumptions 2
- Procedure 3
 - Stage One: Assigning a Task Template to a Warehouse 3
 - Result 3
 - Stage Two: Defining Storage Zones 3
 - Stage Three: Defining Bin Types 3
 - Stage Four: Defining Warehouse Bins 4
 - Stage Five: Task Type Definitions (PIK and SHP) for Specific Customers 4
 - Result 4
 - Stage Six: Defining Pallet Types 4
 - Results 5
 - Stage Seven: Delivery Definitions for Specific Customers 5
 - Stage Eight: Defining Work With Mobile Devices 5
 - Result 5
- Process Summary 5

AIM

To set up definitions required for working with Priority's WMS Lite module.

WORKING ASSUMPTIONS

- The company from which the WMS module is being run has been flagged as the WMS Company in the Companies form.
- Warehouses have been set up in the Warehouses form (see the relevant standard operating procedure), the default 0 bin is defined in each warehouse, and warehouses have been flagged in the AutoShip Pack Crates column in the WMS tab.
- The AutoShip Pack Crates column in the Shipments tab of the Customers form has been flagged for all customers for which you will be opening shipping documents/sales invoices from pick tasks that conclude with a packing slip.
- Task numeration has been set up in the Warehouse Task Templates form.
- Pallet numeration has been set up in the Pallet Number Templates form.
- Label numeration has been set up in the Label Templates form.
- Separators (e.g., period or hyphen) have been defined for use in bin numeration, either by means of the IBinSeparate constant (in the Logistic Constants form) or in the Separators for Warehouse Bins form.
- Bin types have been defined in the Bin Types form.
- Shipping pallets have been defined in the Shipping Pallets form.
- The following constants have been set up in the Logistic Constants form:
 - IVolumeCoef – The coefficient that is used to calculate volume. This is the ratio between the product of dimensions (length, width and height) that are measured in the "std length unit" and a volume measured in the "std volume unit". The default is 1,000,000. Note: In the Financial Parameters for Parts and Bin Types forms, after recording an item's length, width and height, the volume is calculated automatically by multiplying these three values and then dividing the result by this value. For example, for an item with the dimensions 100x100x100, and given the default value of this coefficient, the volume in the "std volume unit" is 1.
 - SCratesQuant – Determines whether, when recording a shipping document based on packing slips, the contents of the packing crates (including quantities) are automatically approved for inclusion in the document.
- A Default-Pack Slips has been defined in the Packing Crate Codes form. This will serve as the default crate in packing tasks handled via a mobile device.
- Possible reasons have been defined in the Reasons for Pick/Put Exceptions form.
- Shipping pallets have been defined in the Shipping Pallets form.
- A primary weight unit has been defined by running the Flag Primary Weight Unit program.
- A volume and/or weight has been defined for all parts in the Financial Parameters for Parts form.
- Warehouse employees (e.g., storekeepers, pickers, forklift operators) have been defined as system users and assigned the necessary privileges to work in the WMS module and to create inventory documents in the Inventory Control module.
- The relevant employee is flagged as a Main Warehs Employee in the Company-Specific Information sub-level of the Personnel File form.

- The appropriate print program and print format are defined in the Inv. Transaction Documents form. The inventory documents that are prepared at the conclusion of the tasks will be printed using these definitions.

PROCEDURE

STAGE ONE: ASSIGNING A TASK TEMPLATE TO A WAREHOUSE

1. Enter the Warehouses form.
2. Retrieve the relevant warehouse (one with a 0 bin).
3. In the WMS tab, specify the Template used to number tasks created for this warehouse.
4. Specify the Label Template used to number labels created for inventory documents associated with this warehouse.

RESULT

Tasks created for this warehouse (either manually or automatically), as well as labels created for inventory documents associated with this warehouse, will be numbered according to the defined templates.

STAGE TWO: DEFINING STORAGE ZONES

1. Enter the Storage Zones form.
2. For each zone, specify the Warehouse in which the current storage zone is located.
3. Fill in the Storage Zone and Zone Description columns.
4. For each zone, fill in the appropriate values and flag the appropriate columns:
 - Velocity – Select the default part velocity of new bins in this zone.
 - Unloading Deck – Select the unloading deck in this warehouse that is assigned to this zone.
 - Main Zone – Flag this column if this zone is used to group together a number of secondary storage zones.
 - Unloading Deck – Flag this column if this zone is used to receive incoming goods.
 - Main Unloading Deck – Flag this column if this is the default unloading deck assigned to GRVs that are recorded for the current warehouse.
 - Loading Deck – Flag this column if this is the zone from which goods are shipped.
 - Returns – Flag this column if this zone is used for returned goods. Note: When a sales invoice is cancelled, goods are transferred to the returns zone and not to the bin from which they were originally picked.
 - Bin Control – Flag this column if this zone is used mainly for storage.
5. Enter the Aisles in Storage Zone sub-level form and define the aisles in this storage zone.

STAGE THREE: DEFINING BIN TYPES

1. Enter the Bin Types form.
2. For each type of warehouse bin, define a Bin Type Code and Bin Type Description. Specify the Maximum Weight and Maximum Volume that can be stored in bins of this type, and/or the Maximum Qty.

3. If bins of this type include pallets, flag the Pallet Control column and specify the appropriate Maximum No. Pallets. If bins of this type are only used to store one type of pallet, specify the Pallet Type Code.

STAGE IV: DEFINING WAREHOUSE BINS

1. Enter the Warehouses form and retrieve the relevant warehouse with a 0 bin.
2. Enter the Storage Zones in Warehouse sub-level form and move to the line for the desired storage zone.
3. Enter the Bins in Storage Zone sub-level form.
4. Indicate the Aisle, Row, Level and Slot in which the bin is located. A Bin code is filled in automatically.
5. Specify the Velocity of inventory stored in this bin (A – fast, B – medium or C – slow).
6. Specify the appropriate Bin Type Code. Additional columns (such as Pallet Control, Maximum No. Pallets, Pallet Type Code, Maximum Weight and Maximum Volume) are filled in automatically, based on the attributes defined for the specified bin type in the Bin Types form.
7. In the Report Display Order column, you can indicate the order in which the current bin will appear in various reports (bins with a lower number appear first).
8. If the current bin is linked to a specific project, specify the Project Number.

STAGE FIVE: TASK TYPE DEFINITIONS (PIK AND SHP) FOR SPECIFIC CUSTOMERS

1. Enter the Target Doc per Task Type/Cust. form.
2. Specify the customer in question.
3. Choose a Warehouse Task Type (PIK or SHP).
4. In the Document Code column, select the type of inventory transaction document to be prepared upon the completion of tasks of that type that were opened for the customer in question.

RESULT

When the Prepare Documents program is run for a PIK or SHP task opened for this customer (via a mobile device or by Direct Activation from the Warehouse Tasks form), the appropriate target document will be opened. This definition overrides the general task type definitions recorded for the task type in the Warehouse Task Types form.

STAGE SIX: DEFINING PALLET TYPES

Aim: To define pallet types and assign them a numeration template.

1. Enter the Pallet Types form.
2. For each type of pallet, specify a Pallet Type Code, Pallet Type Desc. and indicate the maximum loaded Weight of a pallet of this type.
3. Specify a Template to be used when assigning pallet numbers to new pallets of this type.
4. Flag one pallet type as the Initial Pallet Type. This will serve as the default type for all new pallets, even those that are opened via a mobile device.

RESULTS

- It will not be possible to store goods on pallets of a given type if their total weight exceeds the maximum defined for that pallet type.
- Pallet numbers are generated automatically based on the template assigned to the relevant pallet type.

STAGE SEVEN: DELIVERY DEFINITIONS FOR SPECIFIC CUSTOMERS

Aim: To define the type of document to be sent when delivering picked goods to customers (a sales invoice or a shipping document).

1. Enter the Financ. Parameters for Customers form and retrieve the customer in question.
2. Click the Invoices tab. Flag the Delivery with Sales Inv column. Note: Leave this column blank to deliver goods together with a shipping document, and to bill customers for these goods via a multi-shipment invoice.
3. If you want orders to be delivered with sales invoices only up until a particular day of the month, indicate the day in question in the To Day of Month column.

Note: If the Delivery with Sales Inv column is not flagged or if the designated day of the month has already passed, shipping documents will be opened instead.

STAGE EIGHT: DEFINING WORK WITH MOBILE DEVICES

1. Open the Mobile Device Screens form, and set up the appropriate device screens.
2. For each screen, define the users that are authorised to use it in the Users Authorized for Screen sub-level form, including the Main Warehs Employee (as defined in the Company-Specific Information sub-level of the Personnel File form; see "Error! Reference source not found.").
3. Define the permitted storage zones for the main warehouse employee in the next sub-level, Authorized Zones.

RESULT

On the mobile device, all users will see those warehouse tasks assigned to the main warehouse employee performed in storage zones for which that employee is authorised.

PROCESS SUMMARY

Warehouses, storage zones and warehouse bins have been defined, enabling you to maintain inventory data and plan warehouse tasks.