

SOP PICKING BY ORDER WORK  
AREA

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# SOP PICKING BY ORDER WORK AREA

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## AIM

- To select order items for picking, designating quantities to pick, delivery order and other parameters.
- To create a wave of pick tasks based on the selected order items, report execution of the tasks and open the relevant inventory document (Packing Slip/Sales Invoice/Customer Shipment).

## WORKING ASSUMPTIONS

- The necessary setups have been performed for the module (see SOP: Setting Up Warehouse Management (WMS Pick)).
- There is sufficient inventory available in at least one warehouse bin in the relevant storage zone.

## PROCEDURE

### STAGE ONE: SELECTING OPEN ORDER ITEMS IN THE ORDER WORK AREA

Aim: To load the work area with open order items and to flag relevant lines for picking.

1. Run the Clear Order Work Area program to empty the work area of existing order items before loading new ones.
2. Run the Load and Refresh Order Work Area program.

Notes:

- In the input screen, indicate the orders to be loaded based on various criteria.
  - If the Choose Customer, Choose Orders and/or Choose Parts columns are flagged, additional input screens will open accordingly.
3. After the program is completed, open the Order Work Area form and retrieve the order items. Note: To change the order items loaded in the work area, repeat steps 1 and 2, selecting the appropriate items during parameter input.
  4. Record the desired quantities for picking in the Pick Qty column.
  5. In the Document Code column, you can define the type of document to be opened when the task for this order item is completed.

Note: The Document Code assigned in the work area will override the target document defined in the Warehouse Task Types and the Target Doc per Task Type/Cust. forms, as well as the value appearing in the Target Doc-WarhsTask column for the current order in the Sales Orders form.

6. You can update additional columns in the work area (e.g., Delivery Date, Delivery Order, Assigned Picker, Allowed Inv Age-Mos.) that will affect the pick tasks that are opened and the system recommendations that are made.
7. Flag the Approved for Picking column for those order items that should be picked.

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## STAGE TWO: CREATING A PICK WAVE

Aim: To open PIK tasks for the selected order items.

1. Run the Create Pick Wave (by Order) program.
2. In the first input screen, fill in the following parameters:
  - Task Split Method – Determine how the pick wave will be split into tasks. Select 001 (Per Order) to create a separate task for each order. For palletted goods, a separate task will be opened for each order and pallet.
  - Pick Strategy – Specify the strategy that will determine the pick order of the inventory for tasks opened by this wave.
  - Warehouse – Choose the warehouse from which inventory will be picked.
  - Assigned to – Designate the employee who will be responsible for each task created by this wave.
  - Task Date – Designate the date on which tasks generated by this wave will be opened. Today's date is filled in automatically but can be revised.
  - Priority – Indicate the relative importance to be assigned to warehouse tasks created by this wave.
  - Retrieval Type – Specify 6 to retrieve from the order work area.
  - Indicate a Shipping Pallet, where necessary.
  - Indicate the Max No. of Lines that can be included in each picking task created by this wave. This value affects the number of tasks created by the wave.
  - Indicate the Maximum Volume of items that can be included in each picking task created by this wave
  - Make sure the Auto Flagging and Auto Release columns are flagged. Note: To automatically open tasks based on the orders in the work area, without further inspection of the selected order items, flag the No Auto Flag Check column as well.
  - If you also want to generate replenishment tasks for the velocity A (fast) bins of the inventory to be picked, flag this wave for Hot Replenishment. Note: A detailed explanation of this subject can be found in the standard operating procedure ("SOP") on Setting Up Hot Replenishment.
3. In the next input screen, fill in the following parameters:
  - From Zone/Main Zone – Choose the storage zone from which inventory will be picked.
  - From Velocity – If you want to pick only from those bins that are assigned a specific part velocity, designate the velocity in question. Otherwise, leave this column blank.

Tip: You can select several velocities by using operators (greater than, less than, etc.)

- Incl. Orders in Zone – Flag this column to limit the orders to choose from to those linked to the designated storage zones, regardless of the retrieval type defined for the wave.
- If sufficient goods are not available for one or more of the parts to be picked, a message is displayed alerting you of this, with a link to a report listing missing inventory for items included in the wave.

## RESULTS

- Picking (PIK) tasks have been opened with the "Execute" status.
- Order items assigned the same Kit Number will be included in the PIK task only if sufficient inventory exists to fill all lines for that kit.
- Items linked to work orders containing a value in the Days Until Expirat'n, Quality Code or Allowed Inv Age-Mos. columns will be restricted to inventory available for picking that meet the work order criteria (expiration date of the lot, quality code or date code, respectively).

## STAGE THREE: MANUALLY REPORTING TO A PIK TASK

Aim: To report performance of a PIK task.

Note: This stage applies to warehouse personnel who do not use mobile devices for reporting.

1. Enter the Warehouse Tasks form.
2. Retrieve the task assigned to you with the "Execute" Status.
3. If necessary, you can print the task by selecting Print Warehouse Tasks from the list of Direct Activations.
4. Enter the Warehouse Task Items sub-level form.
5. For each part being picked, indicate the Actual Qty picked.
6. Make sure that the values specified in the From Warehouse and From Bin columns correspond with those that were actually used for picking. Revise them as necessary.
7. Return to the upper-level form and change the task Status to "Fully Reported".

## RESULT

The picked quantity has been reported, but inventory balances have not yet been updated in the system.

## STAGE FOUR: PREPARING INVENTORY DOCUMENTS

Aim: To update inventory balances in the system, as a result of the task reported by warehouse personnel.

Note: This stage applies to warehouse personnel who do not use mobile devices to prepare inventory documents.

1. Enter the Warehouse Tasks form.
2. Retrieve the task assigned to you with the "Fully Reported" Status.
3. Select Prepare Documents from the list of Direct Activations.

Note: The type of document that is created and the status it is assigned are determined by values recorded in the following forms, in accordance with the hierarchy below (arranged from highest to lowest):

- Order Work Area
- Sales Orders
- Warehouse Task Types
- Target Doc per Task Type/Cust.

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## RESULT

Inventory balances have been updated in the system, and the appropriate inventory document has been created.

## PROCESS SUMMARY

As a result of the reported PIK tasks, inventory has been picked and transferred to a target bin based on system recommendations and actual task reports.