

**SOP PICKING BY PART (PIK) TASKS**

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# SOP PICKING BY PART (PIK) TASKS

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## AIM

To pick inventory from storage bins that have been flagged for shipping, from the creation of a wave of pick tasks for designated parts, to task reporting, and finally creation of the relevant inventory document (Warehouse Transfer).

To create a PAK wave based on the PIK wave, resulting in the creation of PAK tasks and eventually a relevant inventory document (a packing slip or shipping document).

Note: when preparing shipping documents, the system opens either a customer shipment or a sales invoice, depending on the settings defined for the customer.

## WORKING ASSUMPTIONS

- The PAK task type has been defined so that all completed PAK tasks result in the creation of a packing slip or customer shipment (in the Warehouse Task Types form).
- The necessary setups have been performed for the WMS module (see the relevant standard operating procedure).
- A status has been defined for documents that are prepared automatically upon completion of the task (in the Document Types per Task Type form, a sub-level of Warehouse Task Types). Otherwise, the default initial status is assigned to these documents.
- There is sufficient inventory in at least one warehouse bin in the relevant storage zone.

## PROCEDURE

### STAGE ONE: CREATING A PICK WAVE

Aim: To open a PIK task, with which to pick batches of designated parts needed for sales orders.

1. Run the Create Pick Wave (by Part) program.
2. In the first input screen, choose the warehouse from which inventory will be picked.
3. In the next input screen, fill in the following details:
  - Pick Strategy- specify the desired pick strategy to determine which inventory will be picked when tasks are opened, as well as the sort order of order items in the wave when there are multiple order items for the same part.
  - From Zone/Main Zone- Specify the storage zone (or main zone) from which inventory will be picked. If you want to pick from multiple zones, specify the main zone under which these zones are grouped.
  - From Velocity- to pick inventory only from those bins with a specific part velocity, designate the velocity in question. Alternatively, leave this column blank to pick inventory from bins with different velocities.
  - To Zone- choose the storage zone (that is not subject to bin control) to which picked goods will be transferred.
  - Task date- Designate the date on which tasks are 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- Indicate the method of retrieval to use when choosing inventory to be replenished in this wave
- Notes:
- Press F1 in the column to view a detailed explanation of each retrieval type
  - This value determines what input you will be requested to provide in the next screen.
- If you want the wave to include only those orders that are linked to the storage zones in this wave, regardless of the designated retrieval type, flag the Incl. Orders in Zone column.
  - If you wish to limit the number of lines that can be included in any picking task created by this wave, indicate the Max No. of Lines.
  - If you want to display each order item on a separate line even when the part numbers are identical, select the Sep. Part per Ord Ln option.
  - Flag the Auto Flagging column to indicate that all order items in the specified orders should be flagged for inclusion (in the form that will open). Leave this column blank to specify exact order items and quantities to be included in the pick wave.  
Tip: if you have flagged this column, and you want to enable revision of the flagged items, leave the No Auto Flag Check column blank. Flag the column if there is no further need to review the items to be included in the wave.
  - Make sure the Auto Release column is flagged to assign any tasks created by the wave the Execute status.
4. A parameter input screen or a query form will open (in keeping with the specified retrieval type). Retrieve and select the sales orders to be included in the current wave.
  5. Finish running 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.
- The items in each task are arranged by part number.

## STAGE TWO: MANUALLY REPORTING TO A PIK TASK

Aim: To report performance of a PIK task.

Note: This stage is relevant for 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 being picked.
6. Make sure that the source warehouse and bins specified in the From Warehouse and From Bin columns are those that were actually used for picking.
7. In the upper-level form, 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 THREE: PREPARING INVENTORY DOCUMENTS

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

**Note:** This stage is relevant for 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. To create a warehouse transfer document, select Prepare Documents from the list of Direct Activations.

**Note:** The transfer document will be finalized if a final status was defined for inventory documents prepared upon completion of a PIK task (in the Document Types per Task Type sub-level of the Warehouse Task Types form). Otherwise, see the relevant standard operating procedure for further instructions on handling this document.

## RESULTS

- Inventory balances have been updated in the system, and a warehouse transfer document has been created, recording the transfer of goods from the specified source bin to the specified target bin (e.g., a bin in the loading deck).
- Quantities in the sales orders on which these PIK tasks are based have not yet been updated (reported quantities have not yet been linked to a specific sale order).

## STAGE FOUR: CREATING A PACK WAVE

**Aim:** To open a PAK task.

1. Run the Create Pack Wave program.
2. In the input screen, fill in the following details:
  - Task Splitting Method- Specify the splitting method to be used when tasks are opened in the current wave.
  - Source Wave- Choose the PIK wave created in Stage 1.
  - 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.
  - If you wish to limit the number of lines that can be included in any picking task created by this wave, indicate the Max No. of Lines.
  - Flag the Auto Flagging column to indicate that all order items in the specified orders should be flagged for inclusion (in the form that will open). Leave this column blank to specify the exact order items and quantities to be included in the pack wave.  
Tip: if you have flagged this column, and you want to enable revision of the flagged items, leave the No Auto Flag Check column blank. Flag the column if there is no further need to review the items to be included in the wave.

- Make sure the Auto Release column is flagged to assign any tasks created by the wave the Execute Status.

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#### RESULT

Packing (PAK) tasks have been opened with the "Execute" status.

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#### STAGE FIVE: MANUALLY REPORTING TO A PAK TASK

Aim: To report performance of a PAK task.

Note: This stage is relevant for 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 packed, indicate the Actual Qty being packed.
6. Make sure that the source warehouse and bins specified in the From Warehouse and From Bin columns are those that were actually used for the task. Revise them as necessary.
7. In the upper-level form, change the task Status to "Fully Reported".

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#### RESULT

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

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#### STAGE SIX: PREPARING INVENTORY DOCUMENTS

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

Note: This stage is relevant for warehouse personnel who do not use mobile devices  
Note: This stage is relevant for 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. To create a packing slip (or customer shipment, depending on task definitions), select Prepare Documents from the list of Direct Activations.

Note: The document will be finalized if a final status was defined for inventory documents prepared upon completion of a PAK task (in the Document Types per Task Type sub-level of the Warehouse Task Types form). Otherwise, see the relevant standard operating procedure for further instructions on handling this document.

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## RESULTS

- Inventory balances have been updated in the system, and a packing slip (or shipping document) has been created, recording the transfer of goods from the specified source bin to the specified target bin (e.g., a bin in the loading deck). In the case of a packing slip, the status of the packed goods has been updated to the number of the customer for which they were packed.
- In the case of a packing slip, packed quantities in the sales orders on which the PAK tasks are based have been updated based on the packed quantities reported for these tasks.
- In the case of a customer shipment, order balances in the sales orders have been updated based on the reported quantities in these tasks.