



# Warehouse Management System(WMS) For Sage 100 2018

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## Installation Instructions and Cautions

**PLEASE NOTE: SAGE 100** must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 installation and setup now; then allow any updating to be accomplished automatically. Once SAGE 100 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

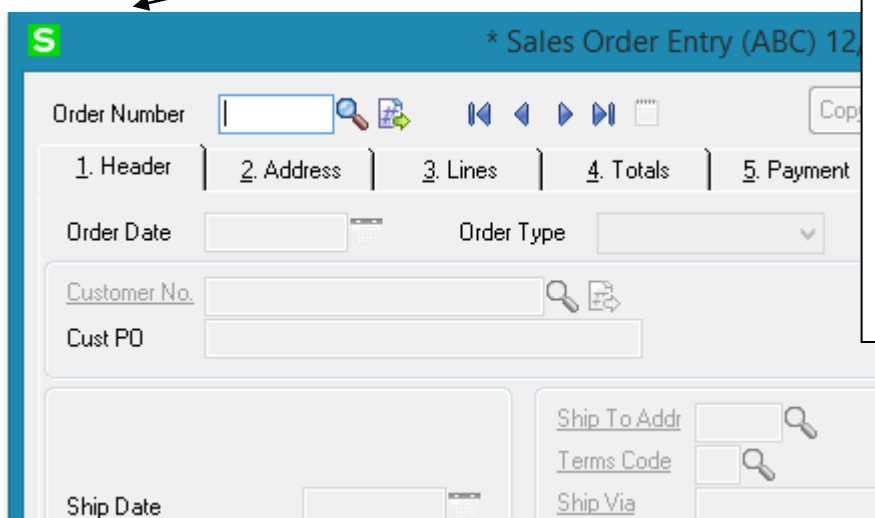
### Wait! Before You Install – Do You Use CUSTOM OFFICE?

**THIS IS AN IMPORTANT CAUTION:** If you have Custom Office installed, **and** if you have modified any SAGE 100 screens, you must run **Customizer Update** after you do an enhancement installation.

**But wait! BEFORE** you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



## Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the SAGE 100.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement	6.00		AAAAAAAAAAAAAAAAAA	BBBB

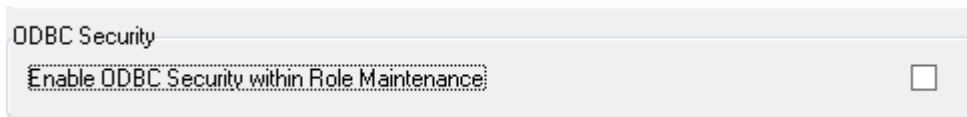
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

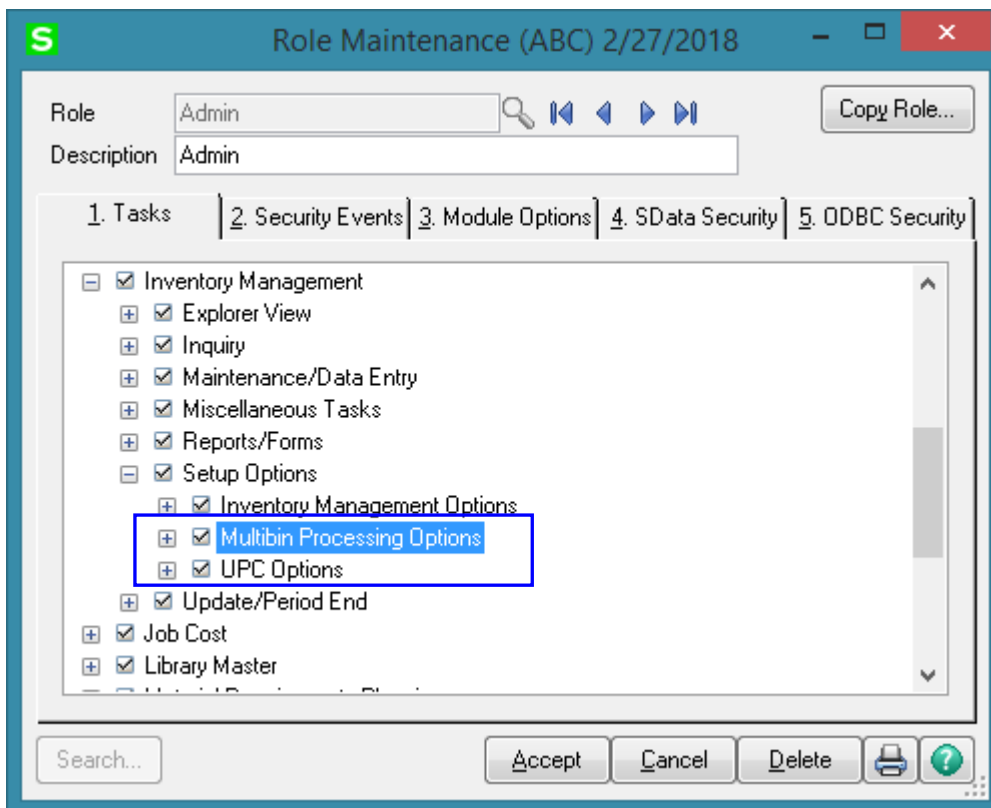
## ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.



## Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.



## Overview

With **IIG Warehouse Management System**, your warehouse processes can be performed using handheld devices that communicate over your wireless network. Whether you're tracking inventory or materials distribution the data is scanned and automatically transmitted directly into your Sage 100 system. Item Label generation program allows for generating inventory receipt labels and printing labels from your desk with all of the options you'll need. **IIG Bin Label Printing** allows for printing bin Labels and Bar Code Bin Labels.

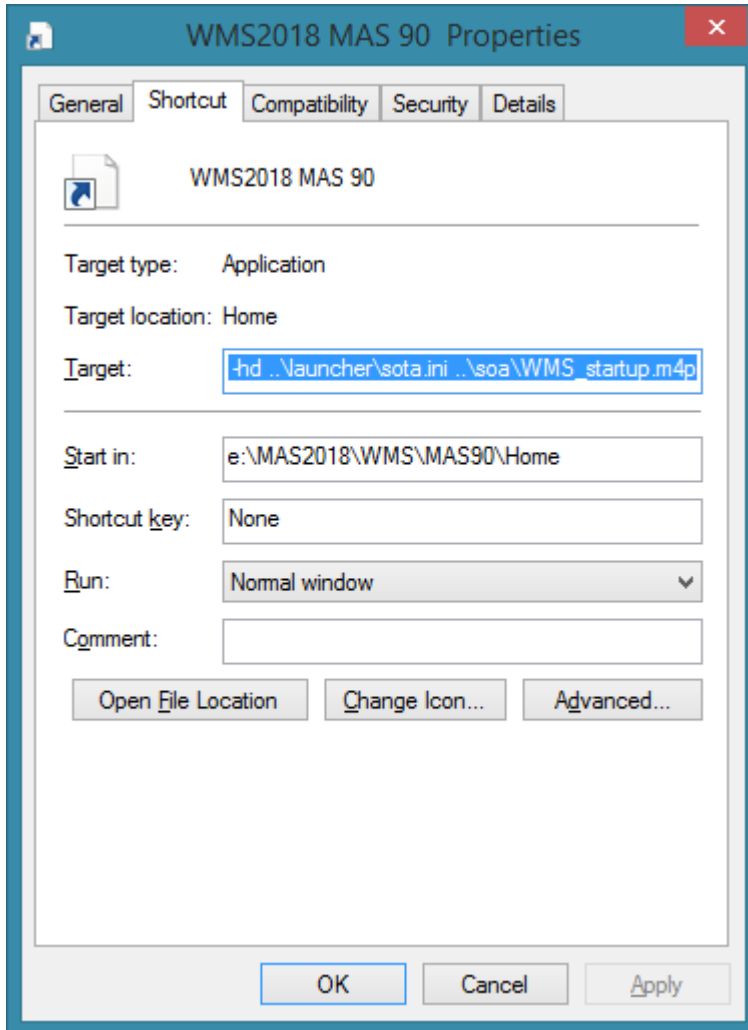
WMS enhancement allows for assigning Universal Product Codes (UPC) to items and recognizing items by UPC. Either of the following codes can be used: UCC-12, EAN/UCC-13, EAN/UCC-14. UPC codes can be assigned to each item manually or to group of items automatically (for details refer to the UPC manual "UPC.pdf" which can be launched through the Manual button added on the **Inventory Management->Setup->UPC Options** screen).

With IIG WMS solution you may track your Inventory in multiple bin locations. WMS is designed to run on handheld devices (such as the Symbol MC3000, MC9000 series) via Microsoft Terminal Services. The Bin Locations and other options related to automatic bin distribution in Sales Order Entry, Bin distribution during Picking Sheet Printing, etc. used for Warehouse Management, are setup and configured in Sage 100 system (for details refer to the MBN manual, which can be launched through the Manual button added on the **Inventory Management->Setup->Multibin Processing Options** screen) . Data is validated real-time, as it is entered. Multiple Bin Location capability is the core feature of WMS. The Bin label Bar code scanning is supported in Picking/Dropping process. The Item/Lot Bar code scanning is supported in all entries.

## Before you run WMS on Handheld

Before you start using **RF Warehouse Automation**, you must modify its desktop shortcut to be able to run it. Map the Network drive where your Sage 100 Standard (MAS90) system is located.

Right-click your MAS90 icon on the desktop, and select the **Properties** in the pop-up menu. Go to the **Shortcut** tab. In the **Target** field, type your path\MAS90\Home\pvxwin32.exe -hd ..\launcher\sota.ini ..\soa\WMS\_Startup.m4p.  
(where *your path* stays for the path to your Sage 100 system).



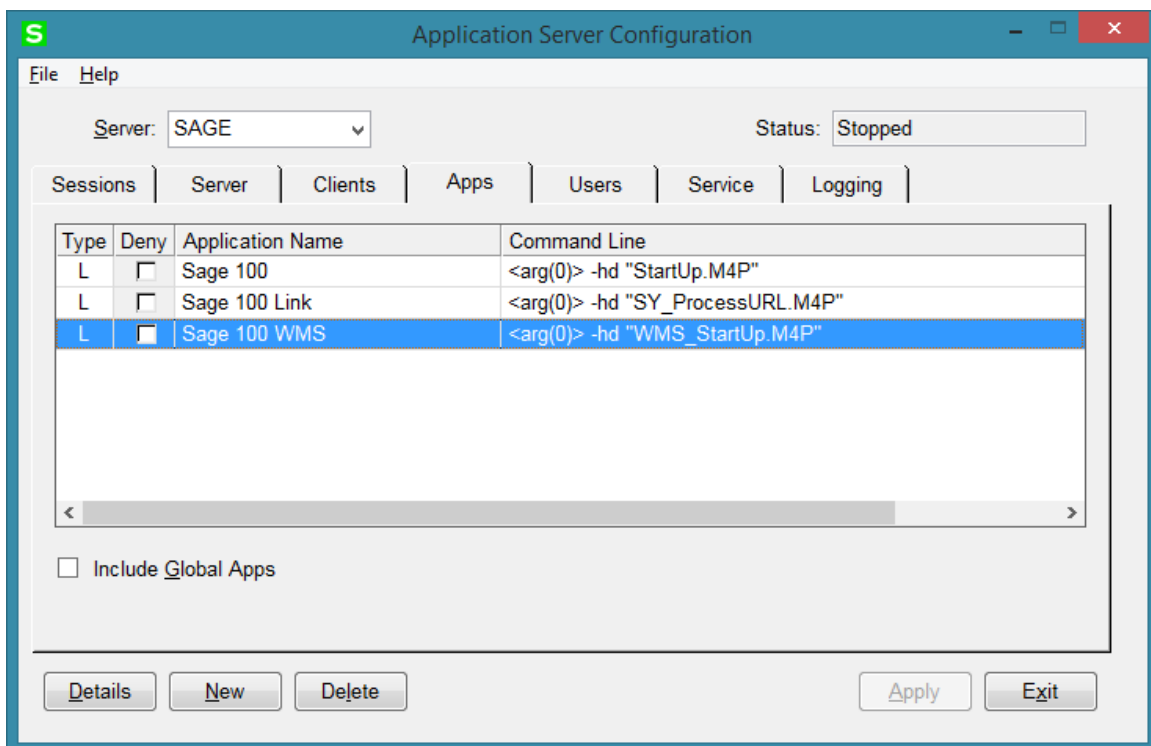


Type the path to the Sage 100 system using mapped drive.  
Click Ok or Apply to save this change.

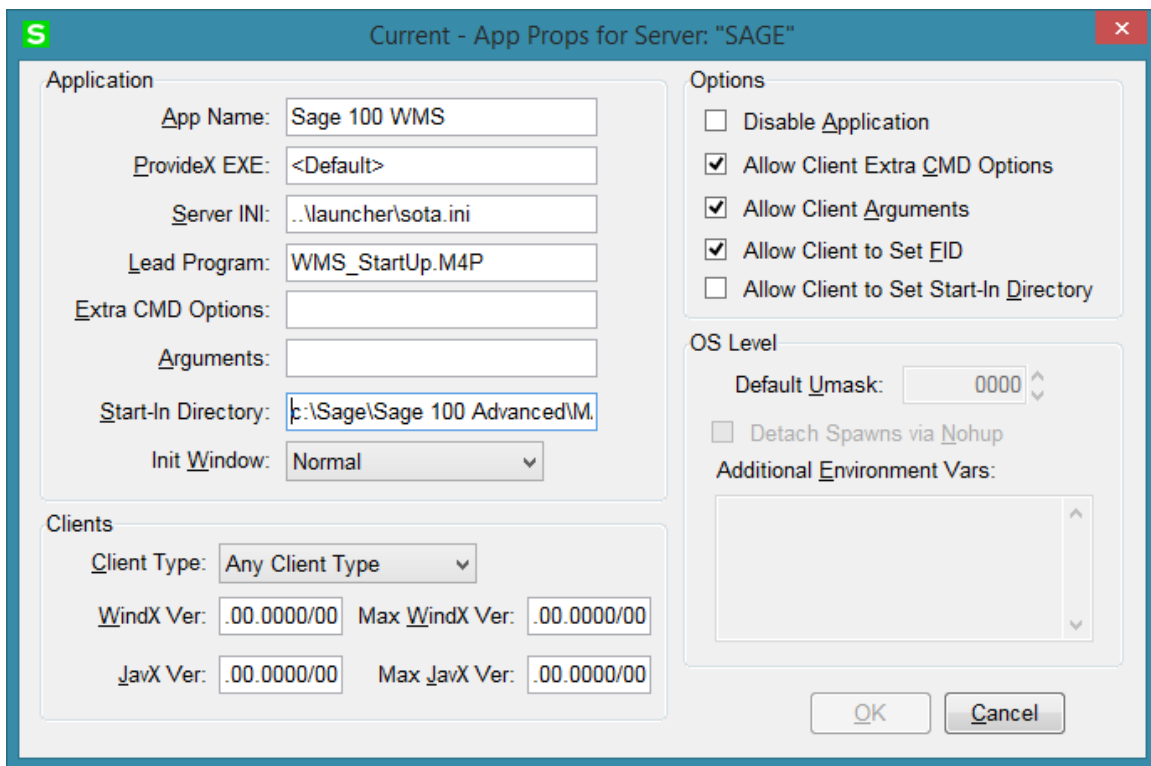
## WMS (Handheld) Client Configuration for Sage100 Advanced/Premium

To be able to run WMS in the client server mode it is necessary to copy the files from **WMS\_Workstation** folder to your **Sage100 Workstation-> MAS90** folder. New Application called **Sage 100 WMS** should be added into the **Application Server Configuration**.

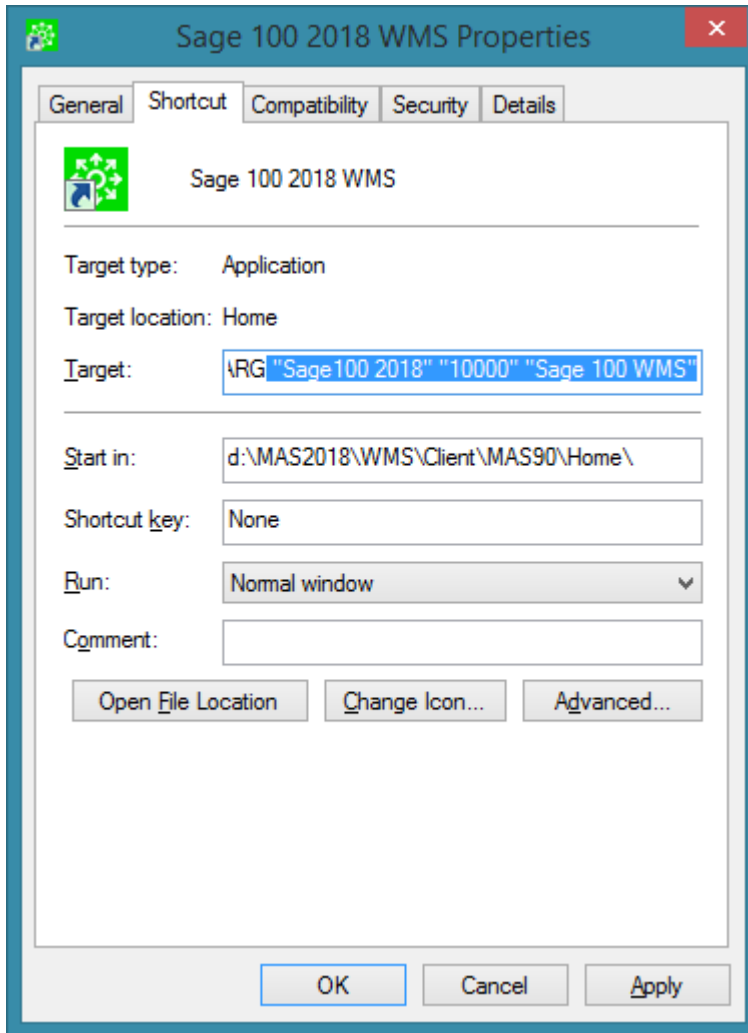
**Application Name: Sage 100 WMS**  
**Lead Program: WMS\_StartUp.M4P**



It is a copy of **Sage 100** application with the App Name changed to **Sage 100 WMS** and the Lead Program changed to **WMS\_StartUp.M4P**:



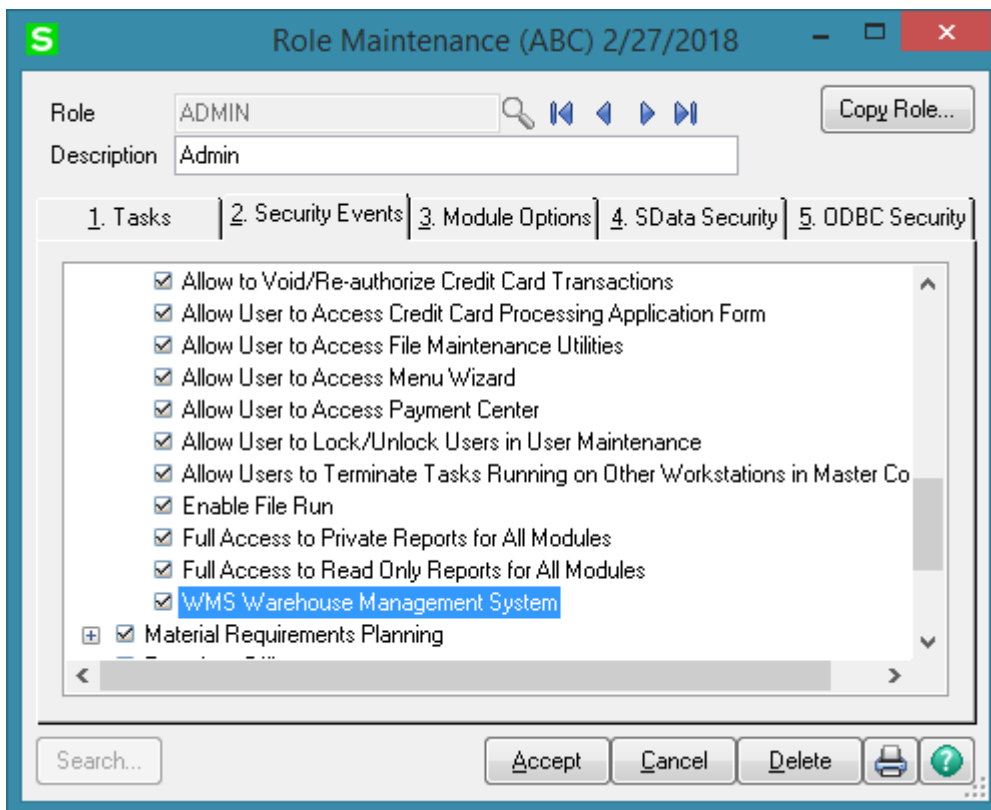
The **Sage 100 2018\_WMS** shortcut is the copy of Sage 100 2018 shortcut with the application name **Sage 100** changed to **Sage 100 WMS**:



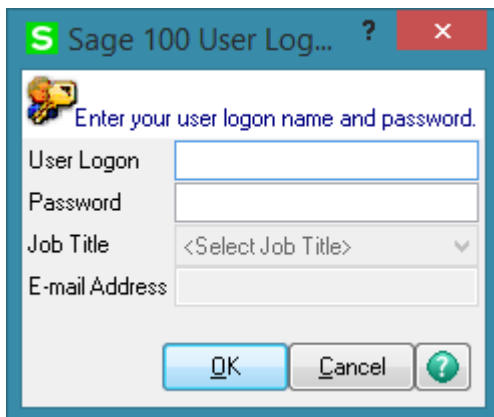
The path of your Workstation system is entered in the **Start in** field.

## IIG WMS - Handheld

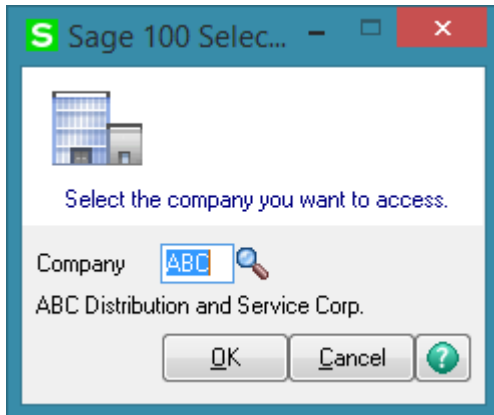
*Note: The **WMS Warehouse Management System** security event must be enabled in the Role Maintenance->Security Events->Library Master for the user's Role to allow running IIG WMS on Handheld.*



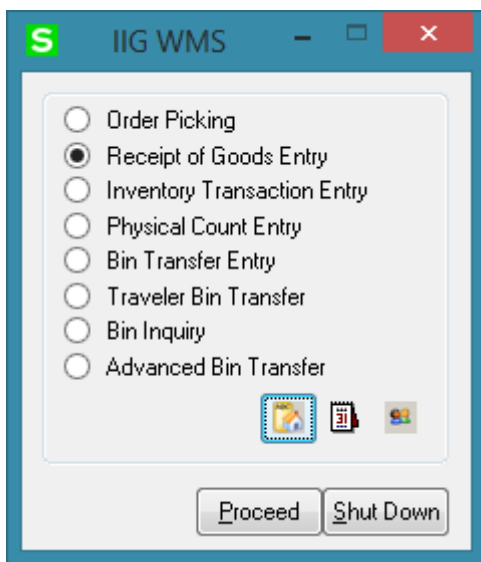
When running **WMS** on handheld, the first screen you see is the **User Logon** screen:



Enter your user logon and password.  
Then select the Company:



The IIG WMS launcher is opened:



To launch any of these options, select it and click the Proceed button, or simply double-click the option you want.

You can also change the active Company, Date, and User clicking the icons below.

The **Shut Down** button closes the system.

## Order Picking

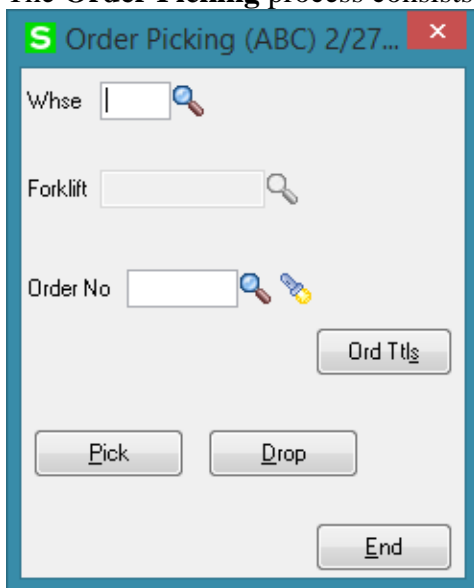
The WMS Order Picking process involves sending an employee through the warehouse or distribution center with an order list and a container. The order picker either walks or drives along aisles to retrieve items specified for orders one by one from a storage area, a forward area (also called a picking area). Typically the picker is directed on a route dictated by the pick list they are holding which uses the most efficient route possible for walking through the warehouse.

The **Order Picking** program allows for picking the orders (distributed by bins in Sage 100) and dropping to respective bins in the shipping area. Traveler Bins can be used in Picking/Dropping Bins if the Traveler Bin Processing is enabled in the system.(Refer to **MBN** manual for more details about Traveler Bins setup )

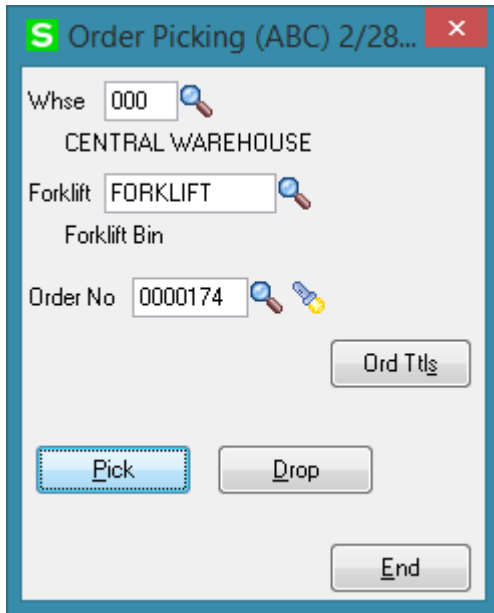
Only the Warehouses setup as **Use Bins** in the Sage 100 WMS system can be processed by Order Picking/Dropping.

Before starting order picking process it is preferable to have the Pick Sheets printed in Sage 100.

The **Order Picking** process consists of Picking and Dropping stages

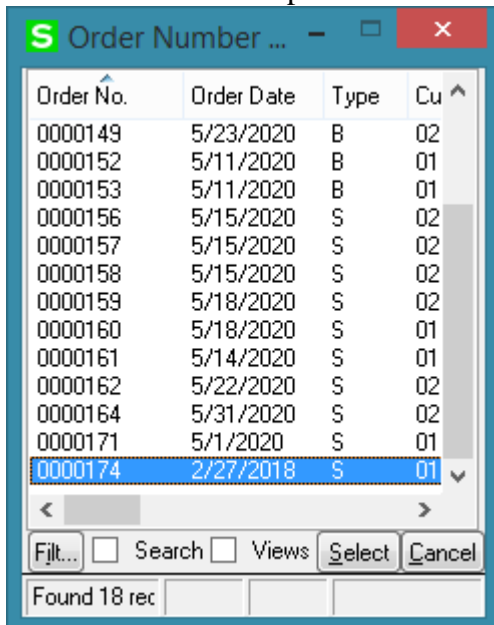


During Picking process product is picked from the Bin it is located to a Forklift Bin (it may be any Bin location with Bin Type set to "Forklift " in the Bin Code Maintenance ). Select the Warehouse. The **Forklift** Lookup button lists all Bin Locations of the selected Warehouse with Bin Type set to Forklift in the **Bin Code Maintenance**.



Select a Warehouse marked as Use Bins in the Warehouse Code Maintenance and a forklift Bin.

The **Order No** Lookup button lists the Orders to be picked.



The Flashlight button lists the orders already picked.

Select the Order to be picked.

The **Ord Ttl's** button opens the list of Sales Order Items with quantity Ordered and Picked:

Item Code	Ordered	Picked	UO
1001-HON-H252	5.00	.00	EAC
2480-8-50	3.00	.00	EAC

Buttons: Availability, Close

Select an Item and press the **Availability** button to view Item available quantity by bin at the time of picking.

For Lot/Serial Items the Lot/Serial number availability by bin is displayed:

Bin Number	On Hand	Available	Lot/Serial
C-100-10	9,694.00	9,691.00	101
C-100-10	200.00	200.00	10210
C-100-10	325.00	325.00	JAN10
C-100-10	850.00	850.00	MAR10
C-100-10	300.00	300.00	MAY20

Button: Close

Here is the Pick Sheet printed for an Order to be picked:



**Picking Sheet Printing**

Main Report

Page: 1

## Picking Sheet

Warehouse: 000 CENTRAL WAREHOUSE

Order Number: 0000174      Order Date: 2/27/2018  
 Customer Number: 01-ABF      Salesperson: 0100

**Sold To:**  
 American Business Futures  
 2131 N. 14th Street  
 Suite 100  
 Accounting Department  
 Milwaukee, WI 53205-1204  
 Confirm To: John Quirn

**Ship To:**  
 American Business Futures  
 Racine Warehouse  
 5411 Kendrick Place  
 Racine, WI 53120

---

Customer P.O.      Ship VIA      F. O. B.      Terms  
                              UPS RED                              Net 30 Days

Location	Item Code	Unit	Ordered	Bin Qty	Shipped	Backordered
C-100-10	2480-8-50 DESK FILE 8" CAP 50	EACH	3.00			
E-300-10	1001-HON-H252 HON 2 DRAWER LETTER FLEW/O LK	EACH	5.00	3.00		
	Lot Number: 101			5.00		

Current Page No.: 1      Total Page No.: 1      Zoom Factor: 100%

Press **Pick** button to open the Picking window and start picking process by scanning respective Bin and Item labels.

**Picking**

Whse 000      Ord No 0000174

Forklift FORKLIFT

From Bin E-300-10      **Clear**

Item Code 1001-HON-H252      **Clear**

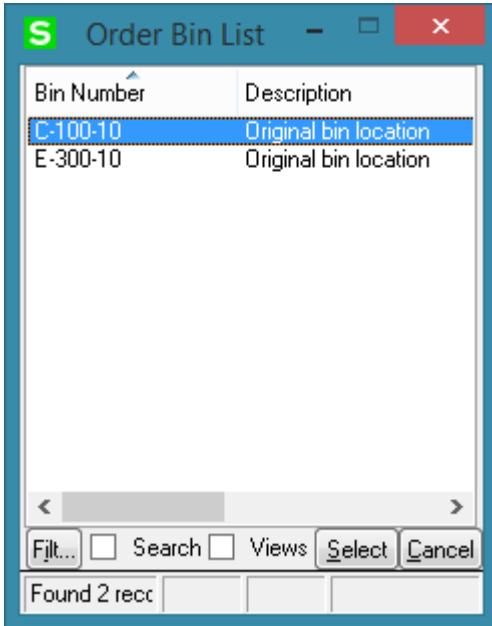
**OK**

**Edit**      **Del**      Qty .00      **Undo**

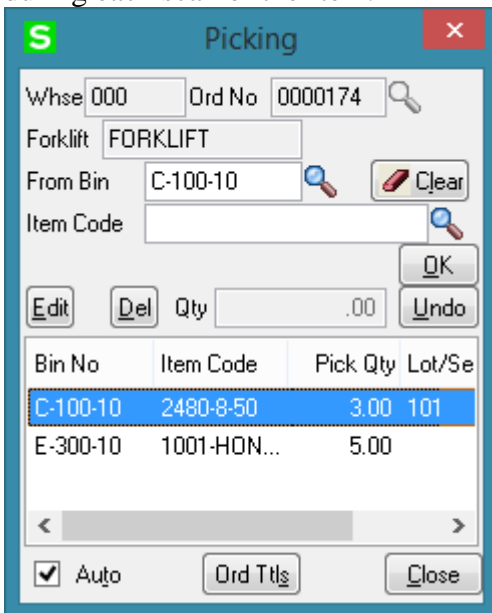
Bin No	Item Code	Pick Qty	Lot.

Auto      **Ord Ttl\$**      **Close**

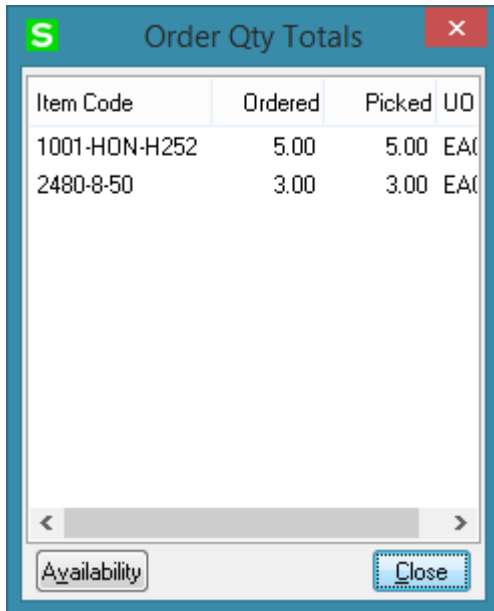
The **Pick From Bin** lookup lists the Bin Locations printed on the Picking sheet.



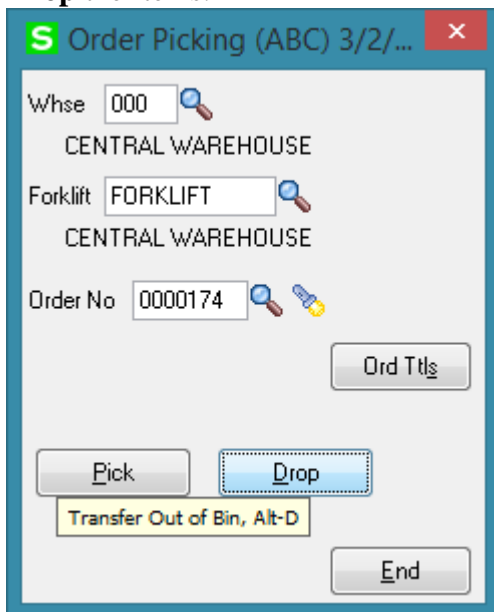
Scan the Bin Number. Check Auto checkbox to have Picked Qty incremented by one during each scan of the Item.



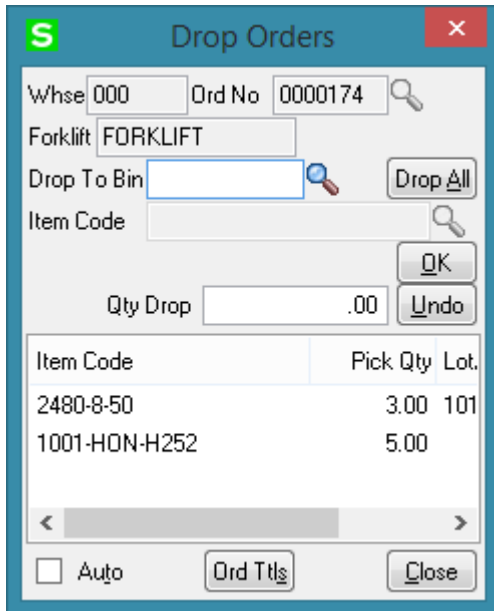
The Picked quantity is updated with respective values in the **Order Qty Totals** screen:



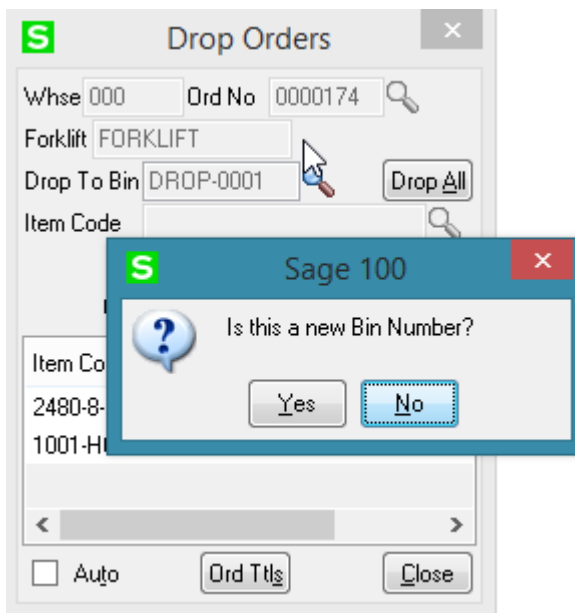
The next step is dropping picked Items to the Drop To Bin. Basically Items need to be dropped to the Shipping bin setup for a warehouse in the Warehouse Code Maintenance. Dropping can be done either by scanning each Item or dropping all Items at once by the **Drop All** button. Close the Picking screen to return to Order picking main screen and **Drop** the Items.

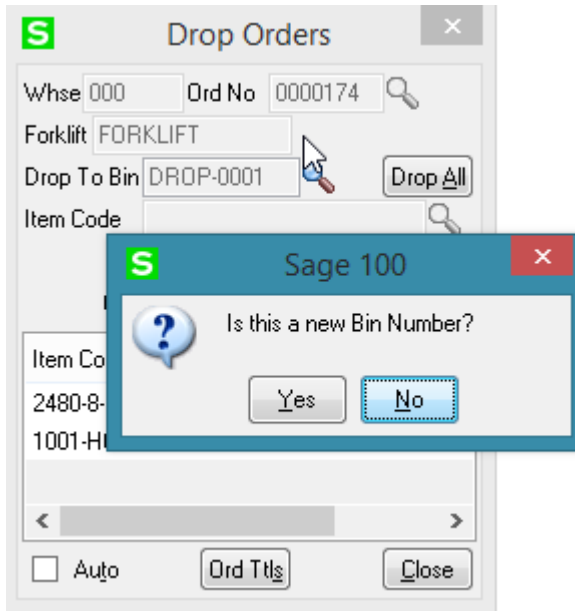


Pressing Drop button opens the Order Dropping screen allowing the user to select/scan a Bin for dropping Items.

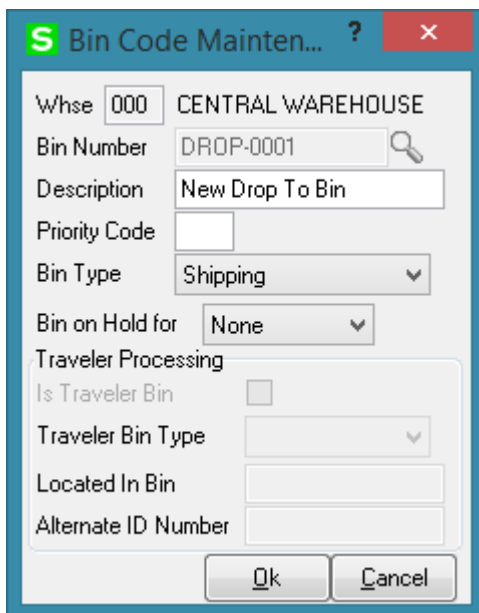


The Items can be dropped also to a newly created (not existing) Drop To Bin if the **Allow on the Fly Bin Number Entry** option is turned on in Sage 100 Multibin Options screen.

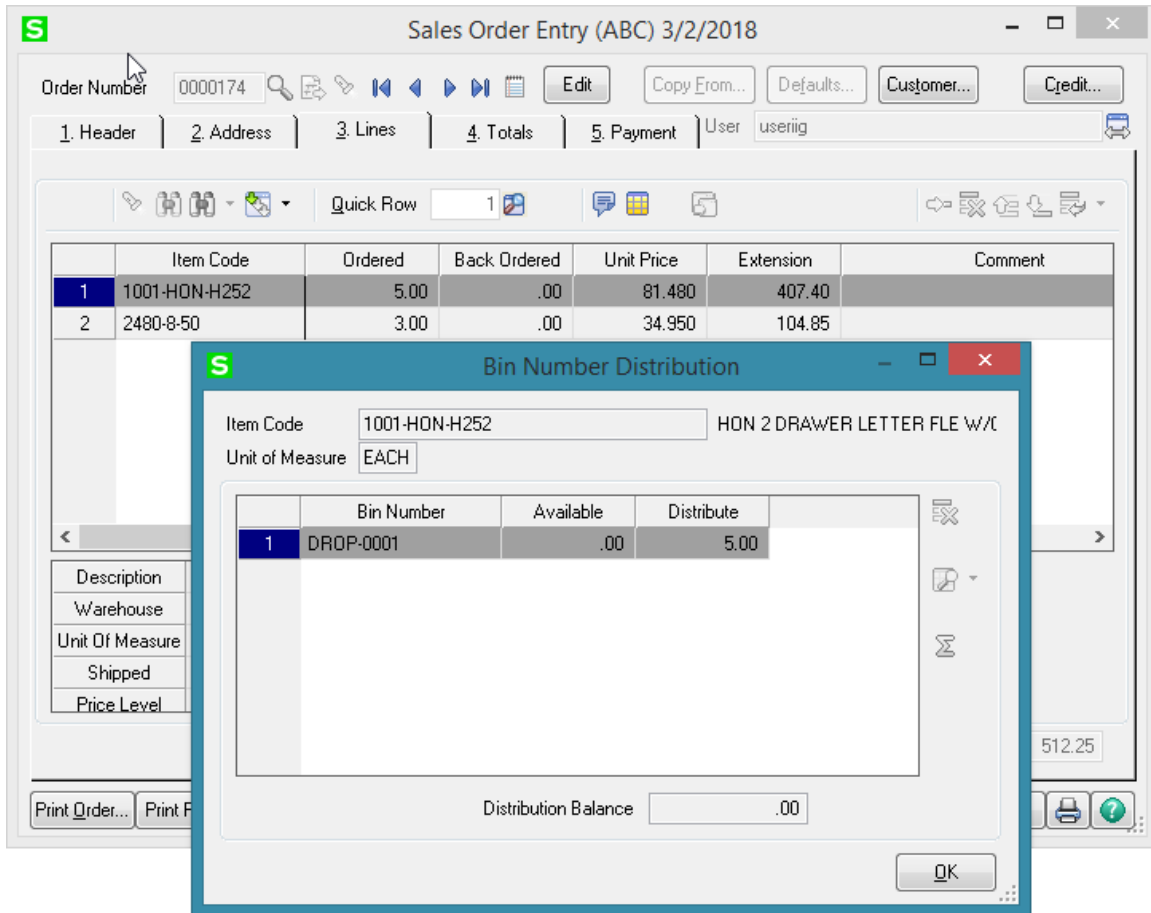




Upon selecting Yes the Bin Code Maintenance is opened allowing to setup the new Bin Location :



Select Drop All button to have all lines dropped automatically.  
After the Order Pick/Drop process is ended the Sales Order->Bin Number Distribution is updated to reflect the Bin Number where Items are dropped to:



After the Order is Picked and Dropped to a bin in shipping area the Shipper can easily ship the Order just by pressing the **Apply Order Distribution** button on the **Shipping Entry Lines** tab.

S Shipping Data Entry (ABC) 3/2/2018

Shipper ID:     Ship Date:     Order No.:   
 Shipping No.:     Ship Status:     SO Created By:   
 Customer No.:     American Business Futures

1. Lines    2. Shipping

Item Code:     Quick Row:     Pkg:

	Item Code	Ordered	Shipped	Back Ordered	Comment
1	1001-HON-H252	5.00	5.00	.00	
2	2480-8-50	3.00	3.00	.00	

S Bin Number Distribution

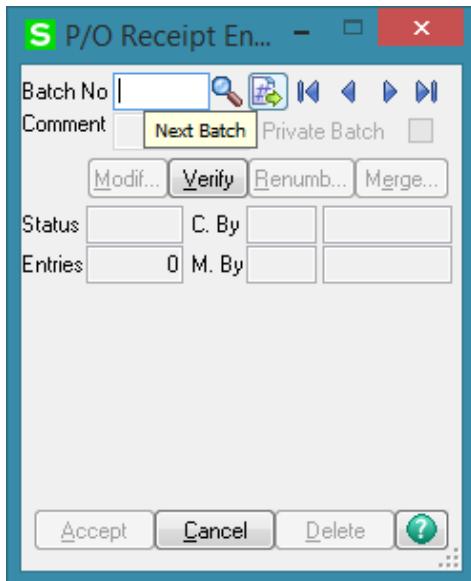
Item Code:     HON 2 DRAWER LETTER FILE W/C  
 Unit of Measure:

	Bin Number	Available	Distribute
1	DROP-0001	.00	5.00
2		.00	.00

Distribution Balance:

Receipt of Goods Entry

If Batch Entry is enabled in the **Purchase Order Options**, the **P/O Batch Number** screen is displayed before opening the **Receipt of Goods Entry** screen.

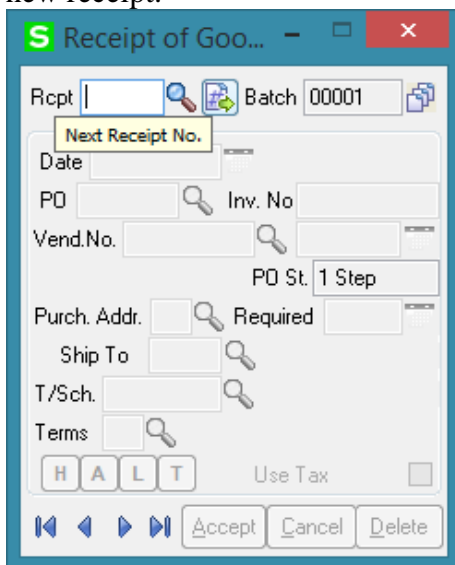


Click the **Next Batch Number** button to start a new batch, or select/enter an existing batch number.

In this case, the batch number is displayed on the **Receipt of Goods Entry** and can be changed by the **Batch Number** button.

The **Receipt of Goods Entry** screen allows for entry of new receipt of goods as well as reviewing the ones already created.

Enter Receipt Number in the **Rcpt No.** field or click the # (Next Number) button to create new receipt.





You can navigate through the orders using standard navigation arrow buttons at the bottom of the screen.

The **H**, **A**, **L**, **T** buttons open Header, Address, Lines, Totals screens respectively. These screens correspond to corresponding tabs of the Receipt of Goods Entry screen in the standard Sage 100 system.

Here is the **Header** screen opened with the **H** button:

Header

Whse 000

Ship Via UPS BLUE

FOB

Comment

Confirm Leo Henry

E-mail lhenry@sage.sample.com

Tel (714) 555-0980

Ext 5852

OK

Click the **A** button to display the **Purchase Address** screen:

Purchase Address

Name Airway Property

Address 7888 Saddlebush Trail

Bank Building

Suite 1008

ZIP 92669-0001 State CA

City Orange

Country USA

Phone (714) 555-0980 5852

Fax (714) 555-0900

Ship To OK

The **Ship To** button in this screen opens the **Ship To Address** screen:



**S** Ship To Address ? x

Name ABC Distributing Company

Address 3191 AIRPORT LOOP

ZIP 92626 State CA

City COSTA MESA

Country USA

OK

The **L** button on the **Receipt of Goods Entry** screen opens the **Lines** screen:



**S** Sage 100 x

Do you want to receive the complete purchase order?

Yes No

Select Yes to receive all Items. The Items will be received with quantity Received distributed to the **Receiving Bin** assigned to current warehouse if the **Auto Distribute to Receiving Bin During Receipt** option is enabled in the Multibin Processing Options:

1. Main | 2. Additional

Sale From Bin By  ▾

Sales Order Entry Commits Inventory in Bin

Pick Lot/Serial Numbers By Receipt Date

Pick Sheet Auto Distribution

Pick Sheet Ordering from Back Ordered

Pick Sheet Back Ordering from Ordered

Exclude Lines with Qty On Hand <=0 in Pick Sheet

Ship only from Shipping Bin

Enable Scan In Shipping

**Auto Distribute to Receiving Bin during Receipt**

Allow Negative Distribution

Enable Traveler Bin Processing

Description	Enable	Next Batch
Bin Transfer Entry	<input checked="" type="checkbox"/>	00002

Bin Transfer Entry

Next Automatic Bin Transfer Entry Number

Allow Bin Segment

Allow On the Fly Bin Number entry

Manual Accept Cancel

Select **No** in the message if you are going to receive the Items by scanning the Item/Lot labels.

The Bin is defaulted to the **Receiving Bin** assigned to current warehouse in the Warehouse Code Maintenance.

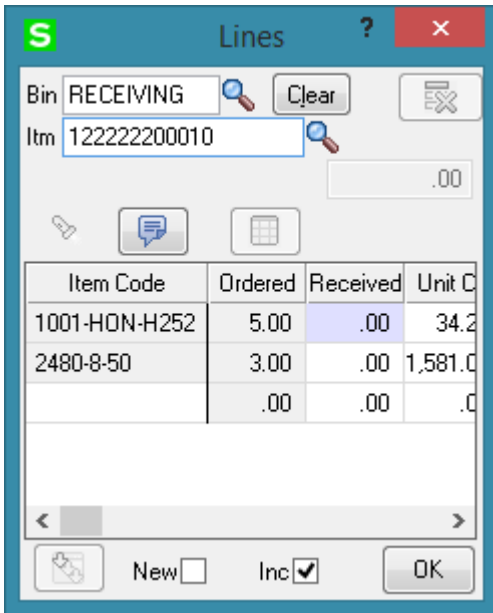
WMS Receipt of Goods works with bar code scanners.

If the **New** box is checked, the program will add items in new lines irrespective of their presence in the existing lines.

If the **Auto Increment** box is cleared, the program will find line with this item and select that line. You can increase the quantity on the line manually.

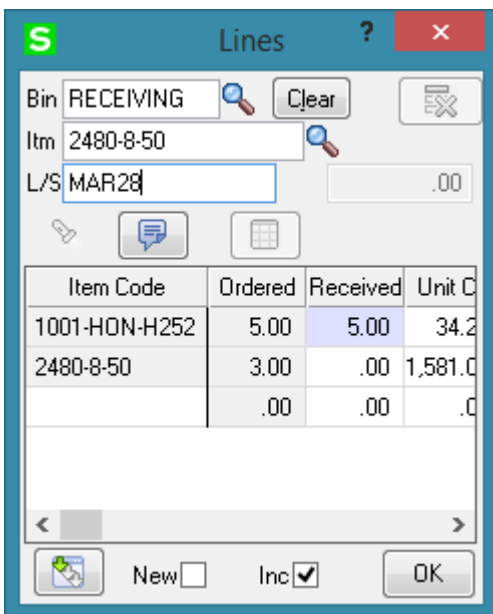
If the **Auto Increment** box is checked, the program will automatically increase the quantity of the item in the line where the received quantity does not exceed the ordered. (Auto Increment works only for the lines received from PO).

You can either check these boxes with the mouse or type in ++NEW++ or ++AUTO++ respectively in the Item Number field.

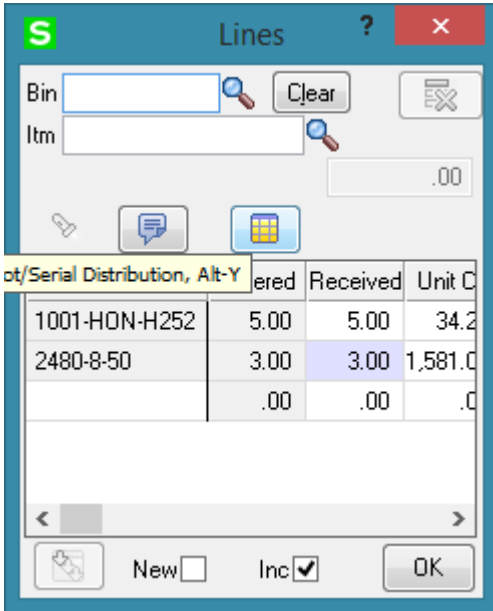


Select the **Inc** (Increment) checkbox to have the Received quantity increased by one upon each scan of the Item Code or the UPC Code.

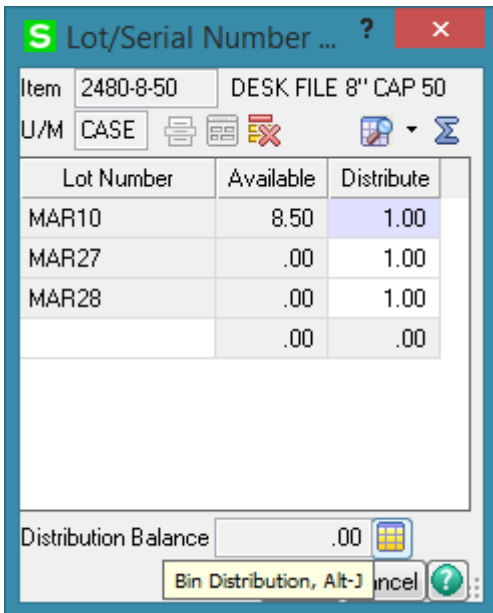
For Lot/serial Items L/S multiline is visible for scanning the Lot number:



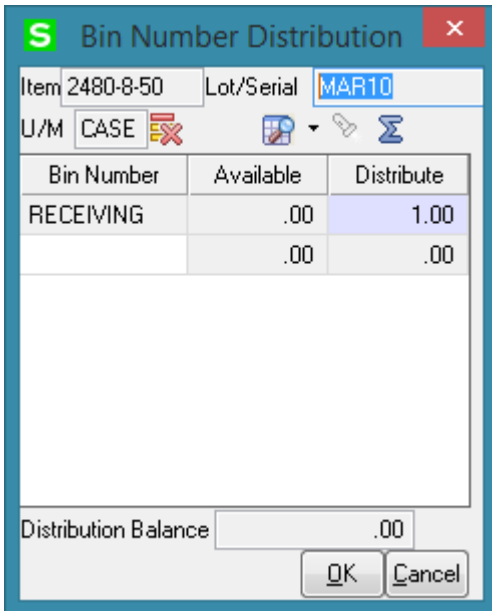
Scan/Enter the lot or serial number.



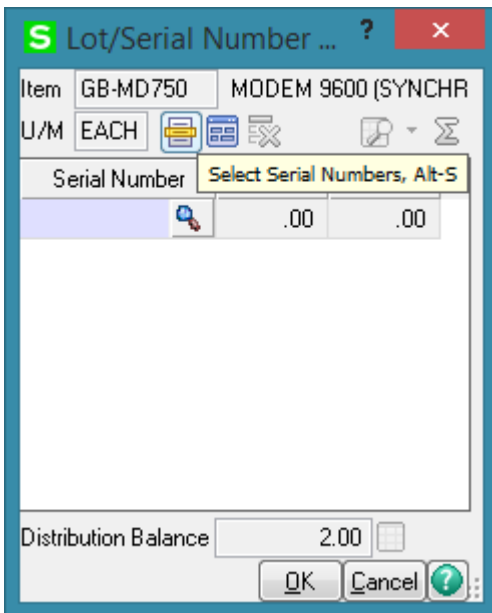
The Lot/serial distribution button allows for opening the Lot/Serial Number Distribution window:



The Bin Distribution button allows for viewing Lot distribution by Bins and change it as needed.

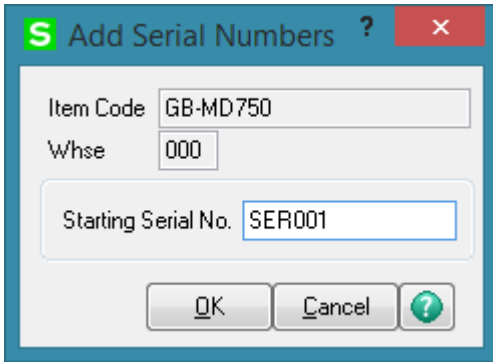


For Serial Items the Select Serial Items button is available:

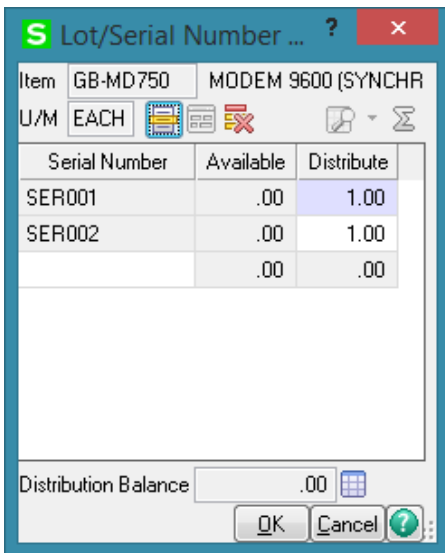


You can click the **Select Serial Numbers** button to select the available serial numbers for the item to be distributed.

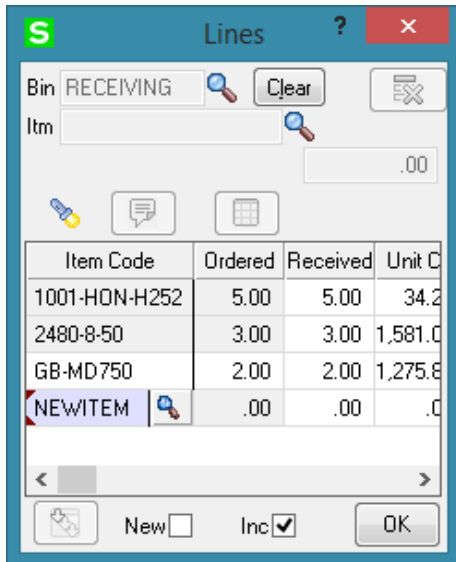
You may use the **Add Serial Numbers** button to create new serial numbers for items being received.



It is necessary to enter only the **Starting Serial No.** and sequential Serial numbers are automatically created based on the Serial Item total quantity received.



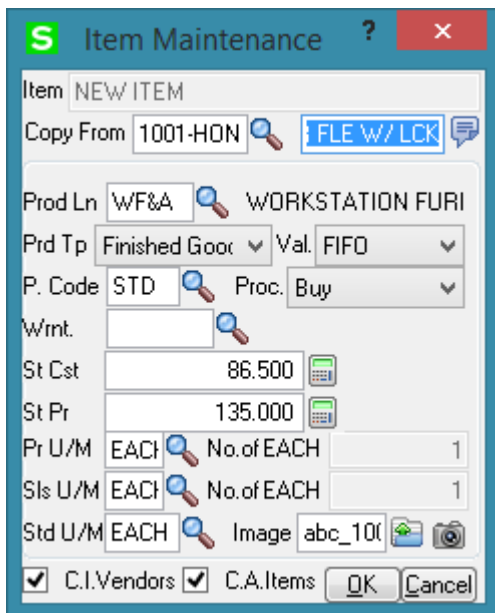
You can also add items on the fly.  
Enter an item number that doesn't exist in the **Inventory Management**.



The following message will appear asking whether or not to create new Item Code or Alias Item.



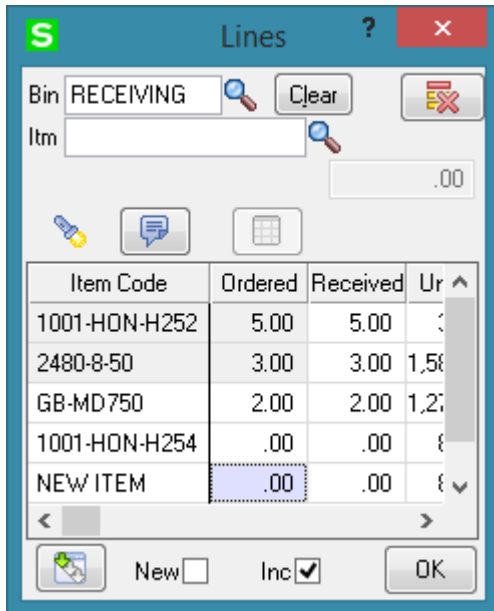
Upon clicking **Yes**, the **Item Maintenance** screen will appear for new item entry (**Item** number is the one entered on the **Lines** tab of the **Receipt of Goods Entry**).





You can use **Copy from** button to copy the fields of already existing items for the new one.

After filling in item related information in this screen and clicking **Ok**, you will be returned to the **Lines** tab of the **Receipt of Goods Entry**.



For Alias Items (when you click **Alias** button on the message box asking whether or not the entered item is a new item), the newly added **Alias Item Number Maintenance** screen will be displayed.



Upon clicking **OK** you will be returned to the **Lines** tab with the selected Item No automatically loaded into the Item Code field in the data entry.

Item Code	Ordered	Received	Unit C
1001-HON-H252	5.00	5.00	34.2
2480-8-50	3.00	3.00	1,581.0
GB-MD750	2.00	2.00	1,275.8
1001-HON-H254	.00	.00	83.5
	.00	.00	.0

If the Work Order or Job Cost module is integrated with Purchase Order, the fields related to Work Order/Job Cost are available in the lines grid:

Item Code	Work Order	Step
*TESTING	0095015	0072

Enter the **Work Order** number representing the work order to which you want to distribute the cost associated with the line item. Click the Lookup button to list all work order numbers. Select a **Transaction Type** to be used to record the cost of the line item. This field is available only if a work order number or step number was entered

Item Code	Job Number	Cost Code
EMT-1	EEC2140	100-010-000

Click the **T** button on the **Receipt of Goods Entry** screen to display the **Totals** screen:

Taxable Purchases	.00
Nontaxable Purchases	7,465.95
Freight Amount	.00
Sales Tax Amount	37.33
Invoice Total	7,503.28
Prepayment Available	.00
Prepayment Applied	.00
Prepaid Check Number	
Hold Payment	<input type="checkbox"/>

The **Landed Cost** button opens the **Landed Cost Entry** screen:

	escriptio	Method	Amount
1	Duty	Cost	10.00
2			.00

Total Landed Cost: 10.00

The **Add. Totals...** button in the Totals screen opens the **Totals Additional** screen:

COD Number:

Less COD Amount: .00

COD Check No:

Invoice Balance: 7,503.28

Invoice Due Date: 3/30/2018

Discount Date:

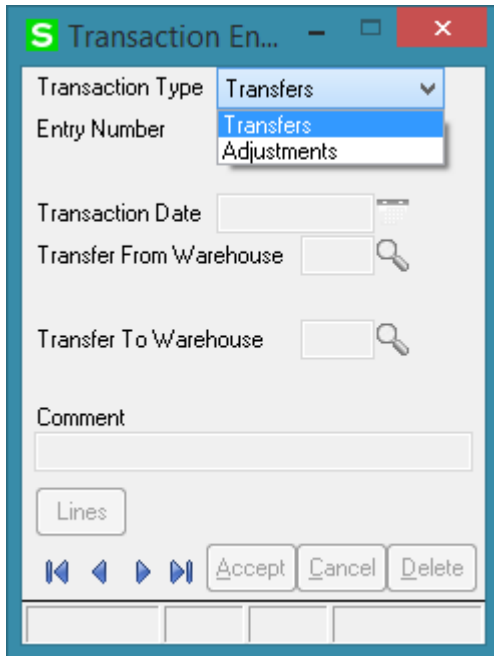
Discount Amount: .00

Prepaid Freight: .00

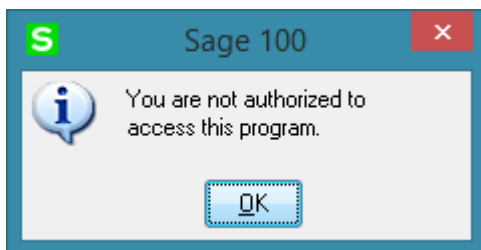
Bank Code:  Security Pacific Checki

### Inventory Transaction Entry

The **Inventory Transaction Entry** screen allows entering **Transfer** and **Adjustment** transactions.



If the **Allow Transaction Entry Adjustments** and **Allow Transaction Entry Transfers** options are not enabled for current user's role in the Role Maintenance - > I/M Module Options, the following message appears upon running the Inventory Transaction Entry:



Select **Transfers** in the **Transaction Type** drop-down list and click the **Next Entry Number** button.

The screenshot shows a software window titled "Transaction En...". Inside the window, there are several input fields and buttons. The "Transaction Type" is set to "Transfers". The "Entry Number" is "00000003". The "Transaction Date" is "3/6/2018". The "Transfer From Warehouse" is "000" with "CENTRAL WAREHOUSE" listed below it. The "Transfer To Warehouse" is "001" with "EAST WAREHOUSE" listed below it. The "Comment" field contains the text "Transfer for 001 warehouse". At the bottom of the form, there is a "Lines" button, a set of navigation arrows, and "Accept", "Cancel", and "Delete" buttons.

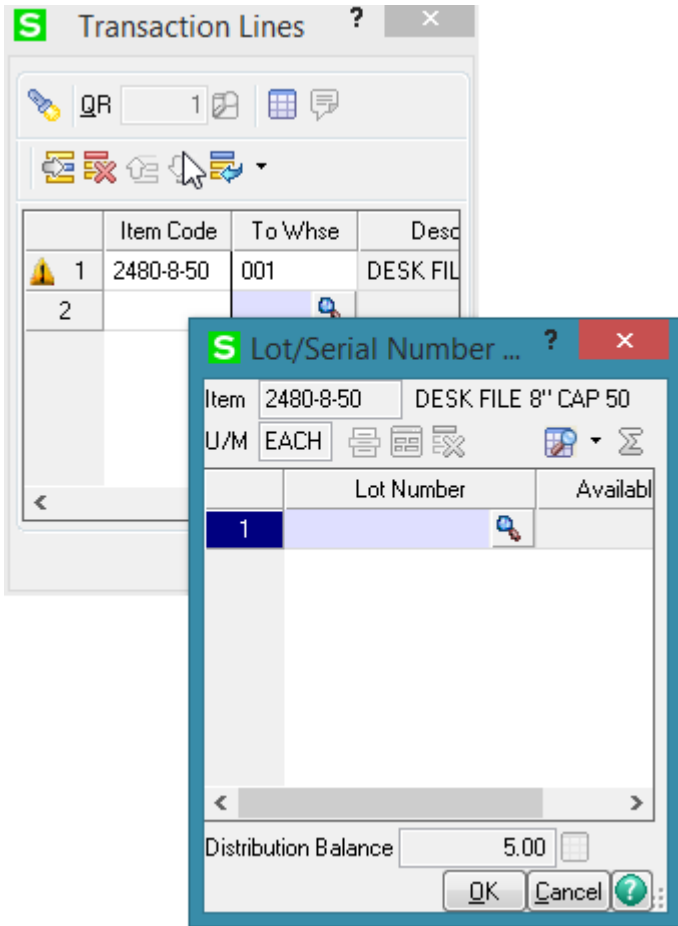
The **Transfer Date** is defaulted to current system date, **Transfer From Warehouse** is populated with **Default Warehouse Code** set in the **Inventory Management Options** and can be changed as required. Select the **To Warehouse**. Type a comment or description for this transaction entry number in the Comment field (up to 30 characters). The comment will be printed on the Transaction Register for reference.


You may navigate through the Transactions using standard navigation arrow buttons at the bottom of the screen.

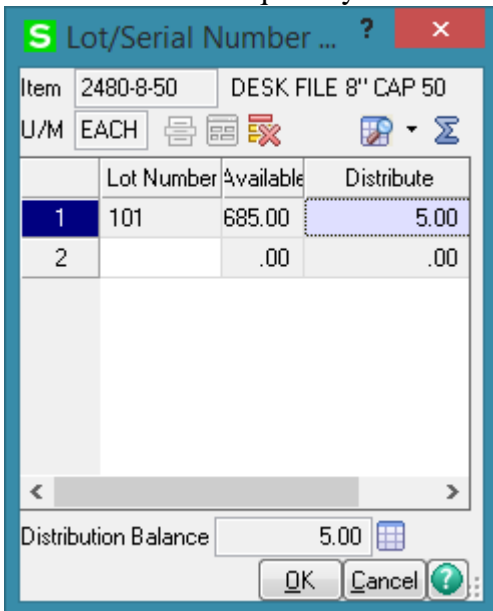
Click the **Lines** button to open the **Transaction Lines** screen.

Scan the Item or UPC code. The **To Warehouse** is defaulted from the header and may be changed for particular line. Enter the **Quantity** to be transferred, and click **OK**.

If the item is Lot/Serial, the **Lot/Serial Distribution** screen is popup.



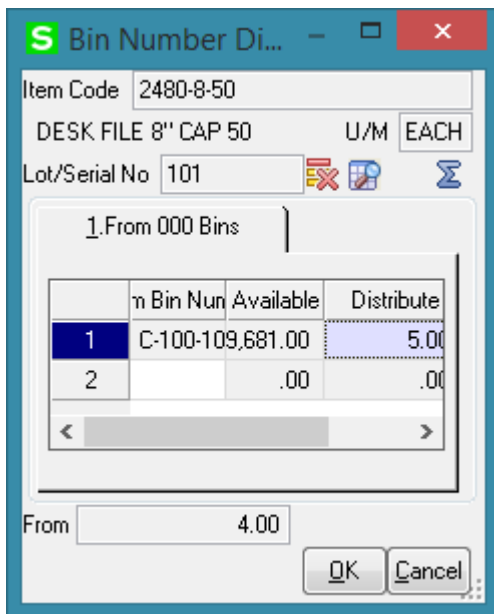
Enter Lot (Serial) Number and quantity to Distribute.  
 The **Show All Lots** button opens the list of all the Lot (Serial) numbers. Use the  button to distribute all the quantity to a selected Lot Number.



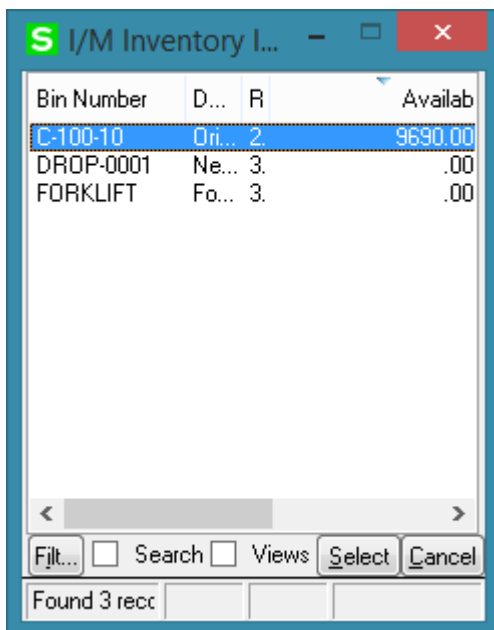
If the selected From/To Warehouse is setup as "Use Bins" the Bin Distribution screen is opened just after Lot Number distribution is completed.

The **Bin Number Distribution** screen consists of two tabs: one for specifying the "From Warehouse" bins and the other for the bins of "To Warehouse".

If either of the warehouses: "From Warehouse" or "To Warehouse" is not using bins only one tab is available. Here is the **Bin Number Distribution** for a transfer entry from a warehouse using bins to a warehouse not using bins.

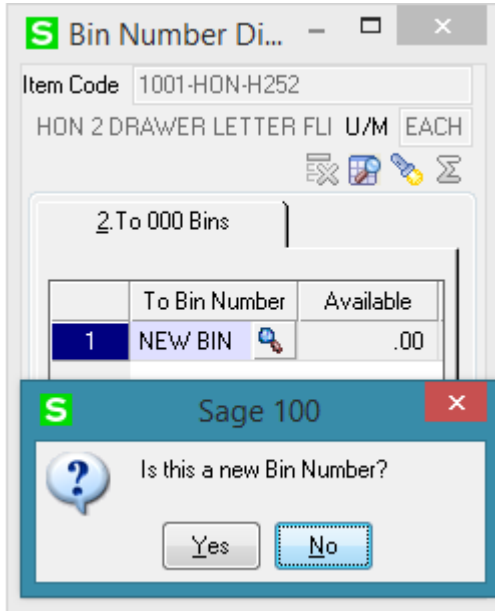


The Bin number lookup opens the list of Bins with quantity available from Item Bin Distribution table.

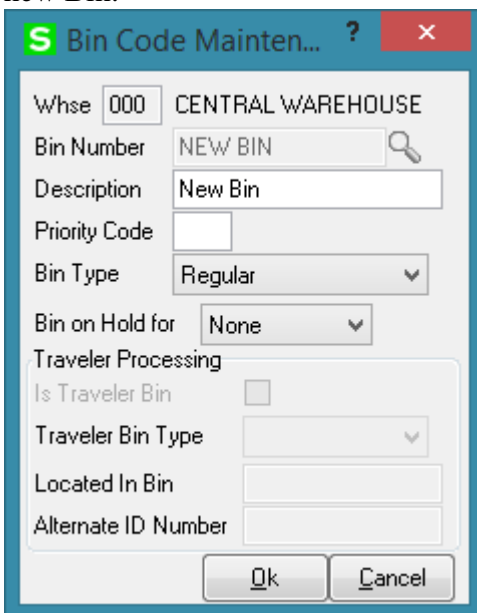




If the **Allow On the Fly Bin Number entry** option is enabled in the **Multibin Processing Options** the user is allowed to create a new bin number on the fly. For adding new Bin number, enter a Bin Number in the To Bin Number field. A message is popped up to confirm new Bin number creation:



Select Yes to launch the Bin Code Maintenance and configure respective settings for the new Bin.



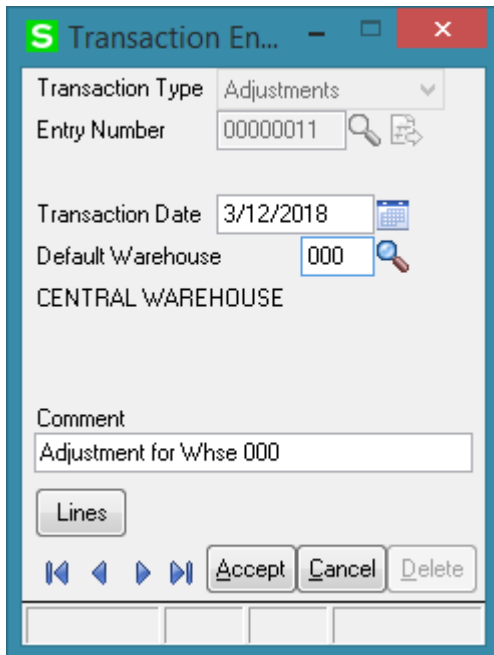
Press Ok to have the new bin created for current Warehouse.

New bin creation is available also in the following WMS entries:

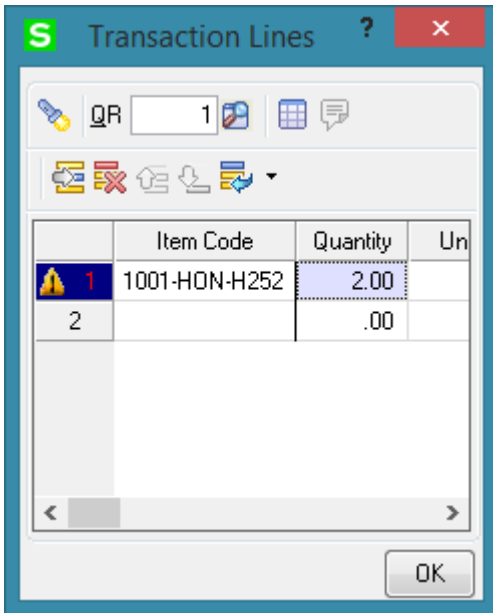
- Inventory Transactions => Adjustment
- Receipt of Goods Entry
- Order Picking => Drop To Bin
- Advanced Bin Transfer => Drop To Bin
- Bin Transfer Entry => To Bin

Select **Adjustments** in the **Transaction Type** drop-down list and click the **Next Entry Number** button.

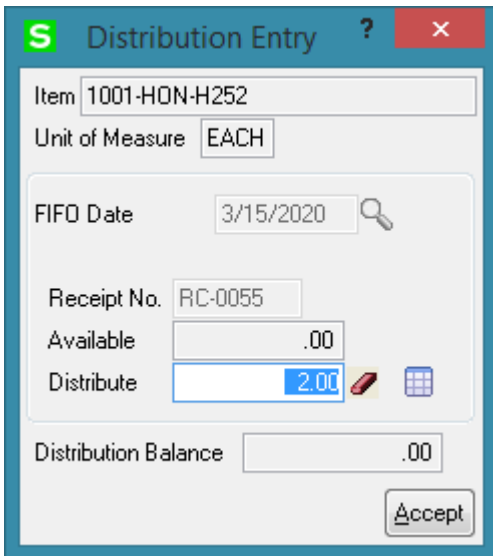
The **Transfer Date** is defaulted to current system date, **Transfer From Warehouse** is populated with **Default Warehouse Code** set in the **Inventory Management Options** and can be changed as required. Select the **To Warehouse**. Type a comment or description for this transaction entry number in the Comment field (up to 30 characters). The comment will be printed on the Transaction Register for reference.



Click the **Lines** button to open the **Transaction Lines** screen.



For items with LIFO/FIFO Valuation, the distribution screen is displayed upon entering the quantity.



If the warehouse is setup as "Use Bins" the **Bin Distribution** button is available on the **Distribution Entry** screen allowing the user to distribute the adjusted quantities by bins

Item 1001-HON-H2  
 U/M EACH

Bin Num		Distribute
E-300-10	2,672.00	2.00
	.00	.00

Distribution Balance .00

OK Cancel

For items with Lot/Serial Valuation, the Lot/Serial distribution screen is displayed upon entering the quantity.

Item 2480-8-50  
 Unit of Measure EACH

Lot Number  
 101


Available 9,681.00  
 Distribute 3.00

Distribution Balance .00

Accept

**S** Bin Number Distribution ✕

Item 2480-8-50 Lot/Serial 101

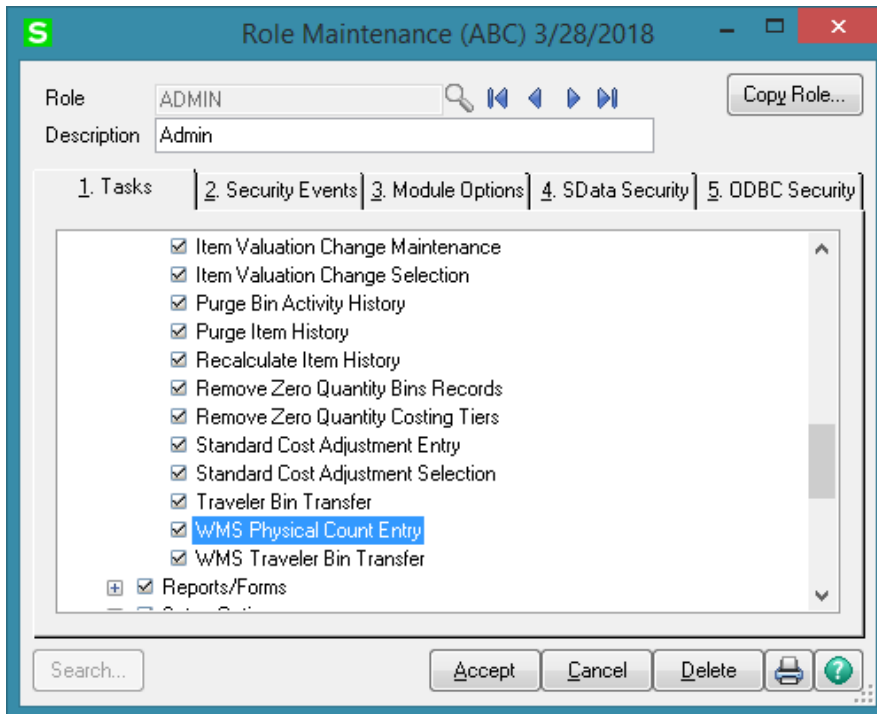
U/M EACH 

Bin Number	Available	Distribute
C-100-10	9,681.00	3.00
	.00	.00

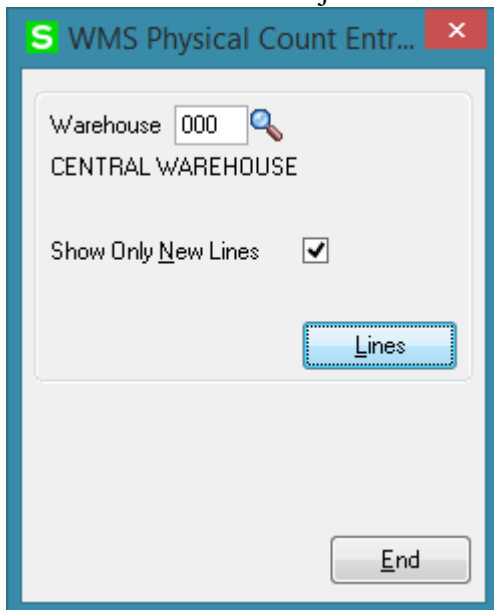
Distribution Balance

### Physical Count Entry

In the **Role Maintenance** select the **WMS Physical Count Entry** task added to the Inventory Management Miscellaneous Tasks menu to enable access to **WMS Physical Count Entry** for the current role.



On the **Physical Count Entry** screen, enter the **Warehouse Code**, and select if you wish to see all lines frozen or just the new lines you will enter.



On the Physical Count Lines scan/select the Bin location and Item Code.

Physical Count Lines

Bin Loc. A-100-10 Clear

Item Code 1001-HON-H252

Count 2.00 OK Undo

Bin Loc	Item Code	Counted	L
A-100-10	1001-HON-H252	2.00	

Incr.  Keep Bin  Accept Cancel

If the **Incr.** box is cleared, the program will find the item and select that line. You can increase the count manually.

If the **Incr. (Auto Increment)** box is checked, the program will automatically count up the item just after entering/scanning the Item Number/UPC Code.

You may scan the Item Code or it's UPC Code.

Physical Count Lines

Bin Loc. A-100-10 Clear

Item Code 122222200010

Count .00 OK Undo

Bin Loc	Item Code	Counted	L
A-100-10	1001-HON-H252	3.00	

Incr.  Keep Bin  Accept Cancel

Scanning the item's UPC code or the ITF-14 case code will select the item. If the ITF-14 case code is scanned the program will increment by the standard UOM conversion factor. So if the ITF-14 is for example a case of 12 and the standard UOM is EACH, the program will count 12 instead of 1. This is best used with the **Incr.** field checked.

If the scanned Item is Lot/Serial, the Lot/Serial field is available for scanning the Lot/serial number/

Bin Loc	Item ...	Counted	Lot/Ser No
A-200-10	2480-8...	2.00	MAR29

Scan the lot number in the **Lot Number** field and click **Ok**.

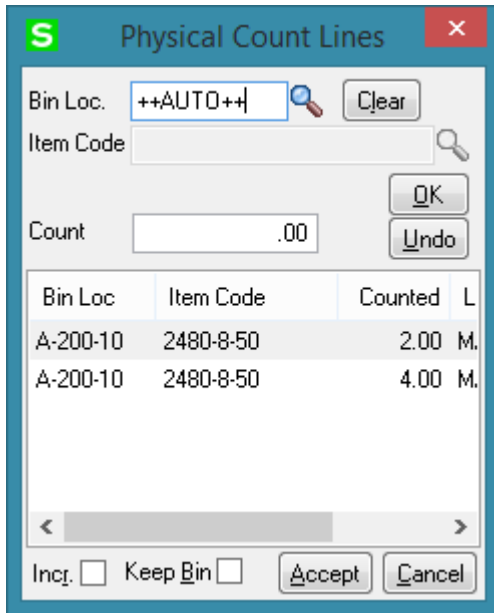
If the entered Lot Number exists in the list it will be selected, otherwise new Lot Number will be added in the list. The lookup will show you the lots for the selected warehouse.

If the **Incr.** box is cleared, the Lot number count will be 0 and it should be entered manually.

If the **Auto Increment** box is checked, the program will automatically increase the count of the lot.

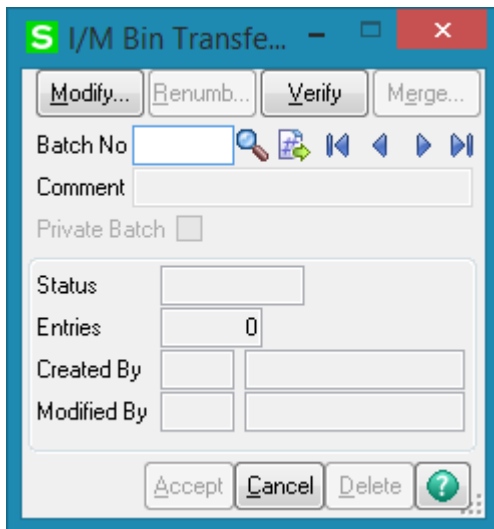
Enter ++**Auto**++ in the **Item Code** field and press Enter to check/uncheck the **Incr.** box automatically.





**Bin Transfer Entry**

**Bin Transfer Entry** allows transferring items from one Bin Location to another within the same warehouse.



The **I/M Bin Transfer Entry Batch** screen is popup if Batch processing for **Bin Transfer Entry** is enabled in the **MBN Options**.

Enter a batch number, or click the **Next Number** button to accept the next automatically incremented batch number. Click the **Lookup** button to list all batch numbers.

Click **Accept** to continue.

The **Bin Transfer Entry** screen is opened. **Enter the Transfer** entry number, or click the Lookup button to list all transfer entry numbers. Click the Next Bin transfer Number button to select the next automatically incremented number available for this field.

	arehou	Item Code	er	From Bin	To
1	001	1001-HON-H2	RECEIV	2.00	
2					.00

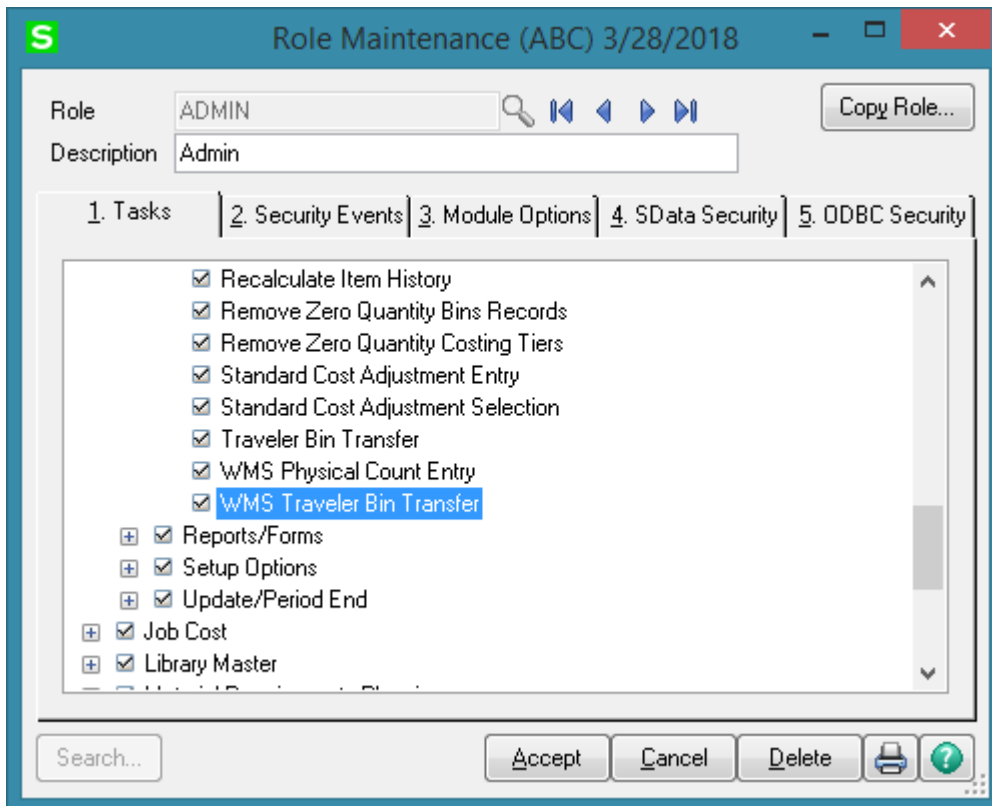
Select the Warehouse code, scan the Item Code/UPC Code and the Bin number from which you want the Item to be transferred. Enter the Quantity and the Bin Number to which the Item is transferred.

*Note: The transfers are not posted until the batch is printed and the Batch Transfer Register updated.*

Transfers are processed only with Standard Unit of Measure.

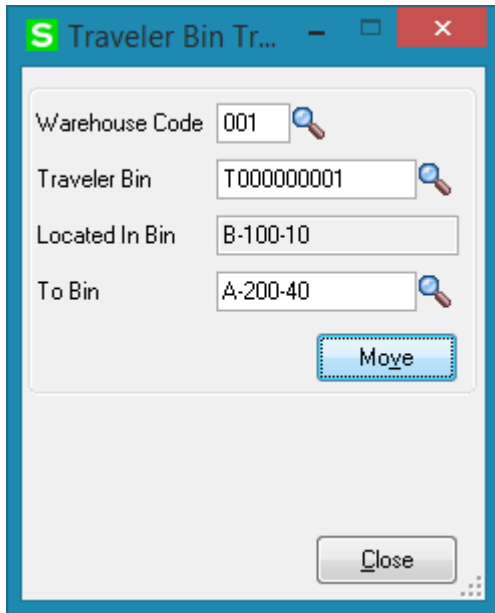
### Traveler Bin Transfer

To be able to run the Traveler Bin Transfer it is necessary to enable the **WMS Traveler Bin Transfer** task (Inventory Management ->Miscellaneous Tasks) for current user's role in the Role Maintenance.



The **Traveler Bin Transfer** program allows for easy transfer of traveler bin from its current bin location to the desired one inside the warehouse.

In the **Traveler Bin** field select the bin to be moved.  
Only Tote and Tare type Traveler Bins can be selected here.



Press Move button to move the traveler bin to the selected **To Bin** location.

Bin Inquiry

**Bin Inquiry** program allows for displaying active bin locations and Quantity on Hand for the scanned/entered Item number in the selected Warehouse.

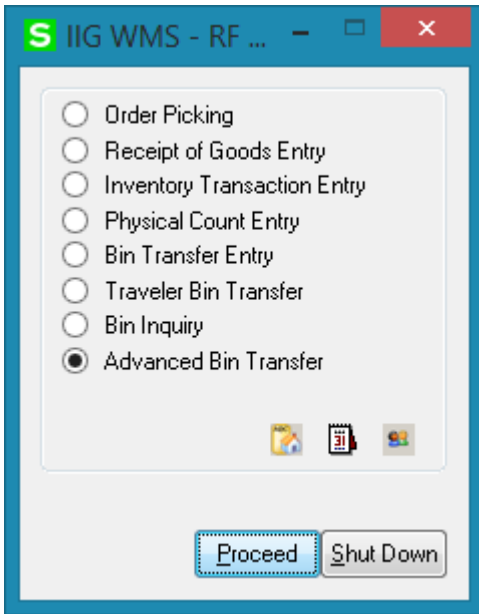
The screenshot shows a software window titled "Bin Inquiry" with a search bar and a table of bin data. The search bar contains "Whse 001" and "EAST WAREHOUSE" and "1001-HON-H252" and "HON 2 DRAWER LET1". The table has three columns: Bin Number, Committed, and On Hand. The data rows are: A-100-10 (Committed: .00, On Hand: 12.00), E-300-10 (Committed: .00, On Hand: 994.00), FORKLIFT (Committed: .00, On Hand: .00), RECEIVING (Committed: 3.00, On Hand: 5.00), and SHIPPING (Committed: 5.00, On Hand: 5.00). Below the table, the "On Hand Qty Total" is displayed as 1,016.00. There are "Ok" and "Close" buttons at the bottom.

Bin Number	Committed	On Hand
A-100-10	.00	12.00
E-300-10	.00	994.00
FORKLIFT	.00	.00
RECEIVING	3.00	5.00
SHIPPING	5.00	5.00

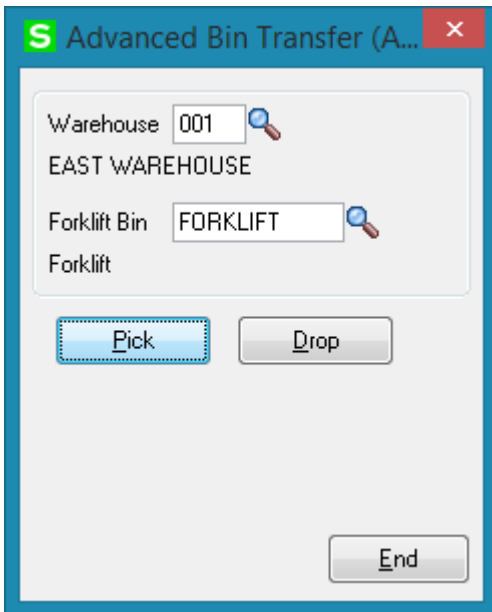
On Hand Qty Total: 1,016.00

Advanced Bin Transfer

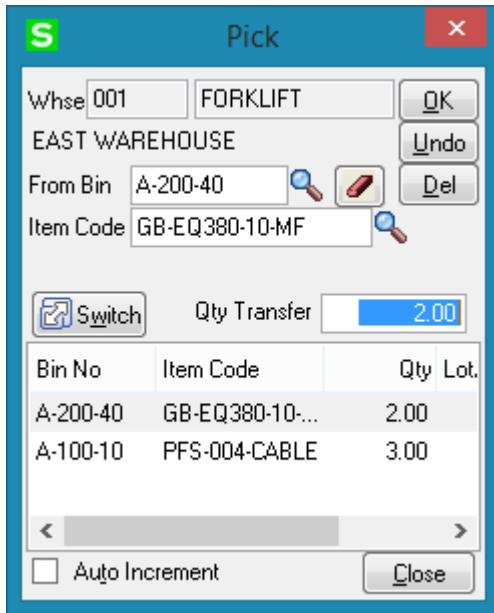
The **Advanced Bin Transfer** program allows for easy inventory transfer out of Bin and transfer into Bin procedure.



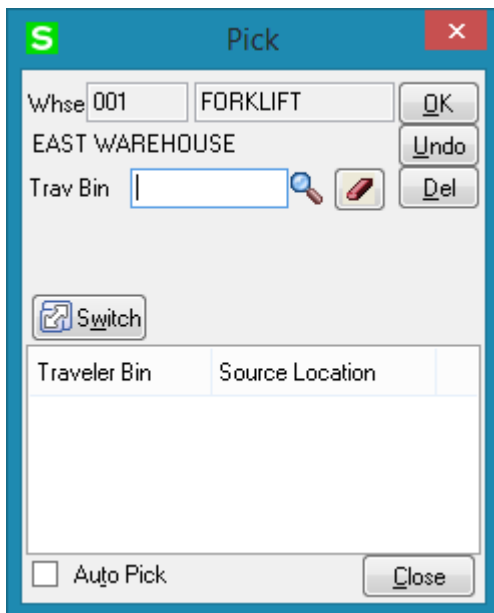
Press **Proceed** to open the Advanced Bin Transfer screen:



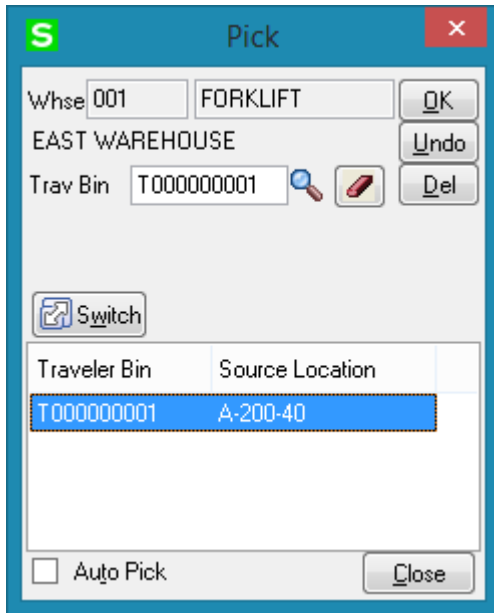
Pick button opens the Pick screen allowing the user to Pick Items for Forklift Bin:



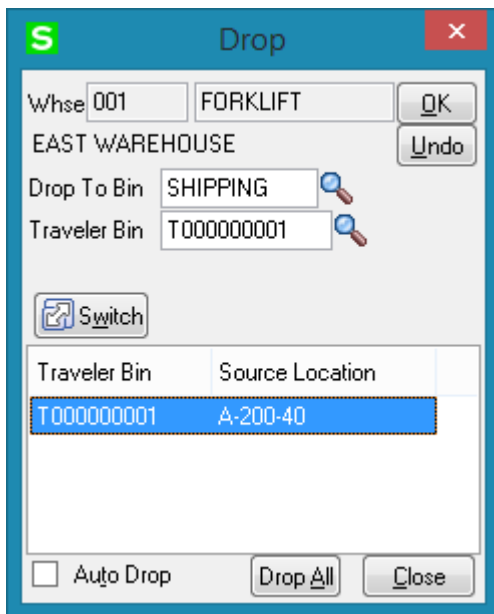
The **Switch** button (is available if Traveler Processing is enabled in the system) enables processing also Traveler Bins.



The user can pick Items and traveler bins at the same time just by the help of Switch button.



After the Items and traveler bins picking is completed, it is necessary to press Drop button to move the Items and Traveler Bin(s) from Forklift Bin to the specified Drop To Bin.



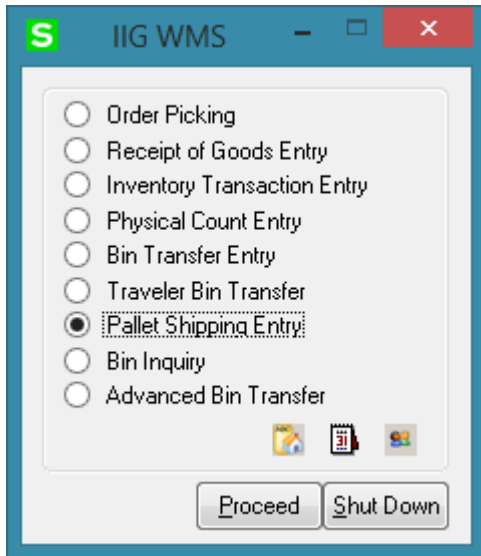
The WMS Advanced Bin Transfer program functions same way as the standard one.



## WMS with Shipping Automation (WSA)

### Pallet Shipping Entry

The **Pallet Shipping Entry** is available in the WMS launcher if IIG WSA enhancement is installed in the system.



The **WMS Pallet Shipping Entry** allows the user to scan what is picked for the order onto a pallet and accurately track what is on the pallet.

Select **Pallet Shipping Entry** from launcher menu and press Proceed to run the **Pallet Shipping Entry**.

The screenshot shows a software window titled "S Pallet Shipping...". It contains several input fields and buttons. The "Order No." field is empty. The "Pallet" field is empty. The "Item Code" field is empty. The "Pkg" field has a dropdown menu with "E" selected. Below the input fields is a table with three columns: "Pallet", "Item Number", and "Qty Picked". The table is currently empty. At the bottom of the window are three buttons: "Order Qty Totals", "Accept", and "Delete".

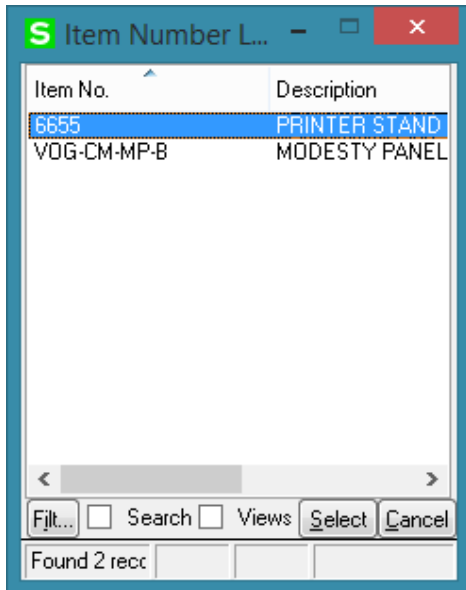
**Order Number** – Select Order number to process. The lookup button lists only Standard and Back Orders.

**Sales Order List** (flashlight button) – Lists the orders already processed.

The screenshot shows the same "S Pallet Shipping..." window. The "Order No." field now contains the value "0000162". The "Pallet" field contains the value "0001". The "Item Code" field is still empty. The "Pkg" field has a dropdown menu with "E" selected and "0001" entered. The table below is still empty. The "Order Qty Totals" button is highlighted with a dashed blue border.

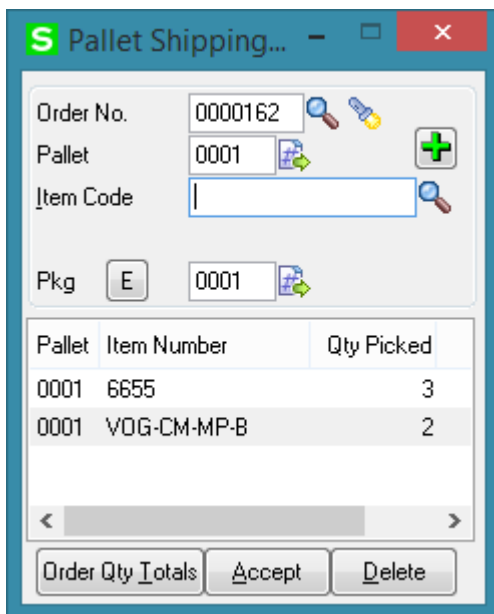
**Pallet** – Is the Pallet number being processed. The Next Pallet Number button generates the next sequential pallet number for current order.

**Item number** – This field allows for entry of item number

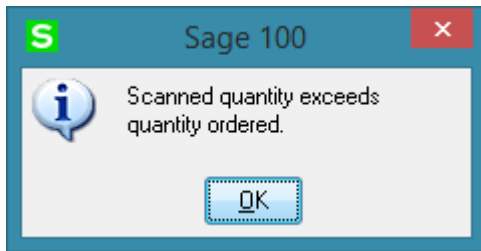


**Pkg** – Indicates the current Box number. The Box number is incremented as the boxes are scanned in UPC. Increments using the standard bar code like shipping data entry.

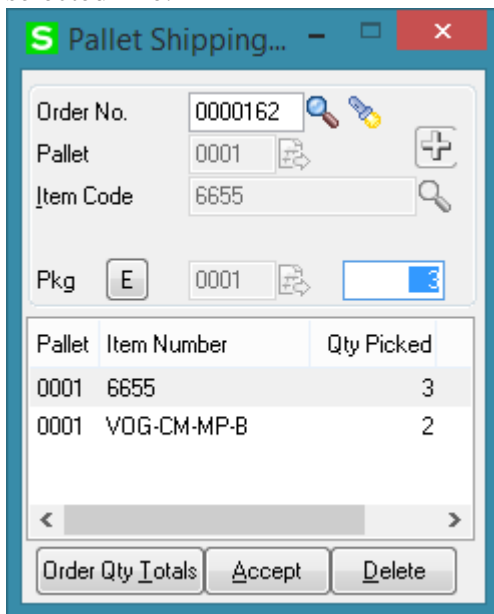
**Plus/Minus button (+/-)** – In **Plus** mode (default), upon scanning an item the quantity of the item is incremented by one if the Item Number is scanned. If UPC code for a box is scanned, the quantity is incremented by the UOM conversion factor. In **Minus** mode (pushed), while scanning the item the quantity is subtracted from quantity already entered. If the item quantity is zero it is removed from the list. After each scan, the button is reset to the **Plus** mode.



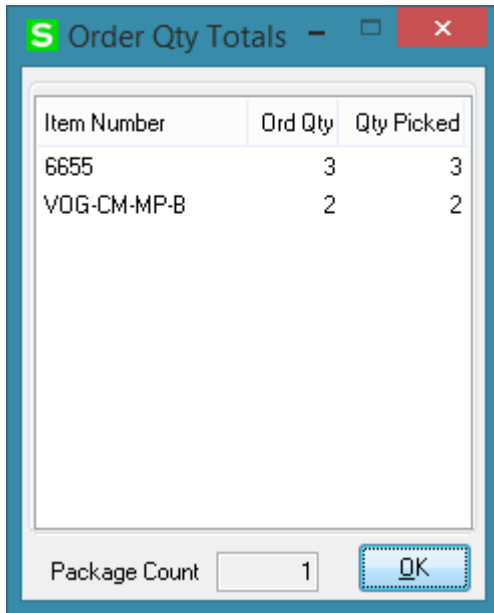
The following message will appear if the scanned quantity exceeds the quantity on the order.



The **E (Edit)** button next to the **Pkg** field allows for editing the Qty Picked on the selected line.



**Order Qty Totals** – this button allows for viewing the items ordered and the quantities picked.



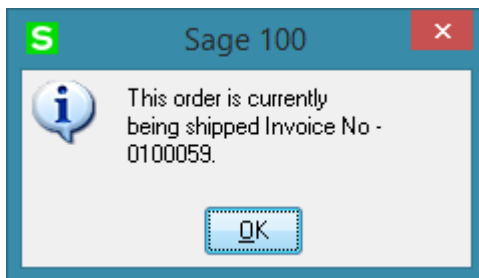
**Package Count** – this field displays the total number of packages.

**OK** – Click the OK button to return to the pallet entry.

**Accept** – This button writes the records in the list box and clears the screen for the next shipment.

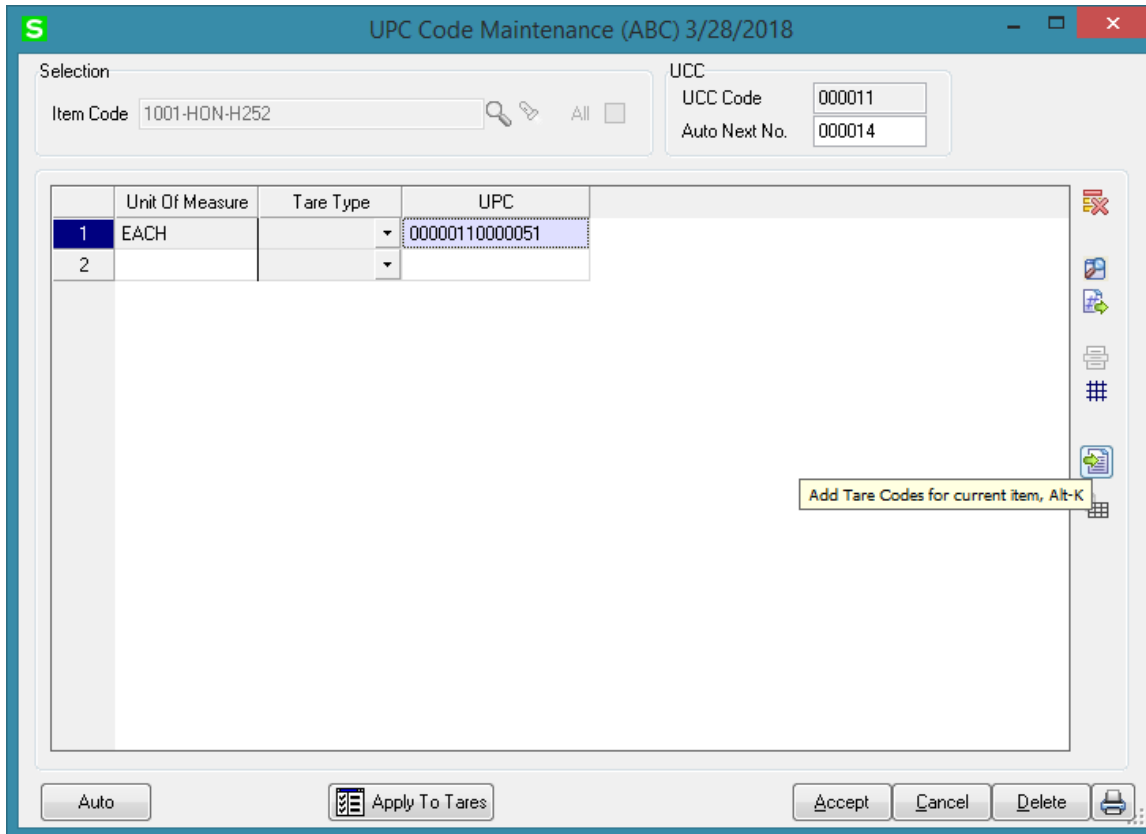
**Delete** – Deletes the entire order from the Pallet Shipping Entry.

The following message appears if the selected Order number is already Invoiced:



## UPC Code Maintenance

The **UPC Code Maintenance** allows for linking the ITF-14 code type to the WSA Tare fields.



Upon entry of Unit of Measure for an Item corresponding Tare Type is automatically loaded from the **IIG Item Freight Packaging/Tare Fields**.

The **Add Tare Codes for Current Item** and **Load All Items with corresponding Tare Codes setup** buttons added on the right of the grid allows for loading the Tare Types. The **Add Tare Codes for Current Item** allows for loading the Tare Types setup for the selected Item in the **IIG Item Freight Packaging/Tare Fields** entry.

Here is an example of an Item with Tare Types setup in the **IIG Item Freight Packaging/Tare Fields** screen.

Item Code: 1001-HON-H252      HON 2 DRAWER LETTER FILE

Packaging/Tare

Ship as one box:

	U/M	Box Code	Length	Width	Height	Default
Each Tare	EACH	000	000	000	000	<input type="checkbox"/>
Case Pack Tare	CASE	002	002	002	002	<input type="checkbox"/>
Master Pack Tare	BOX	001	002	002	002	<input type="checkbox"/>
Pallet Pack Tare	CART					<input type="checkbox"/>
Inner Pack Tare	PKG					<input type="checkbox"/>

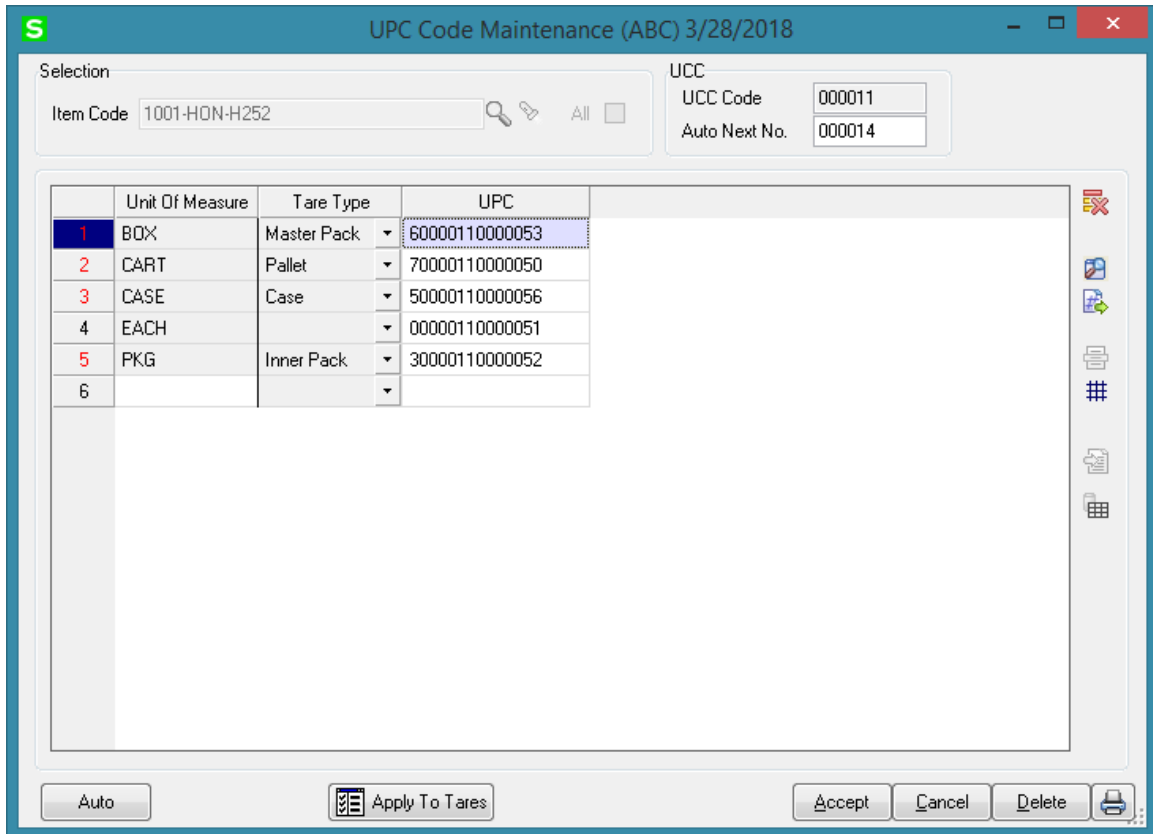
Buttons: OK, Cancel

Upon pressing the **Add Tare Codes for Current Item** respective Tare Type records are loaded in the grid:

Selection: Item Code: 1001-HON-H252      UCC: UCC Code: 000011, Auto Next No.: 000014

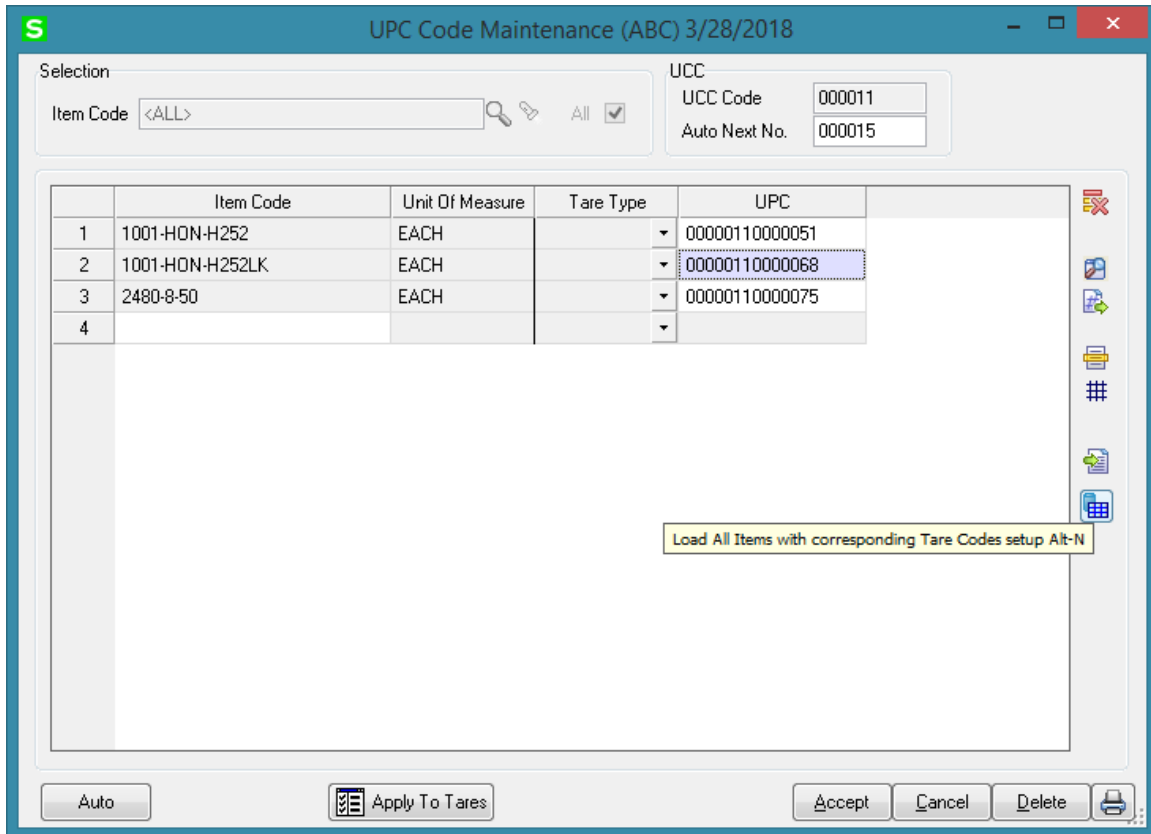
	Unit Of Measure	Tare Type	UPC
1	BOX	Master Pack	
2	CART	Pallet	
3	CASE	Case	
4	EACH	Inner Pack	00000110000051
5	PKG	Inner Pack	
6			

Buttons: Auto, Apply To Tares, Accept, Cancel, Delete



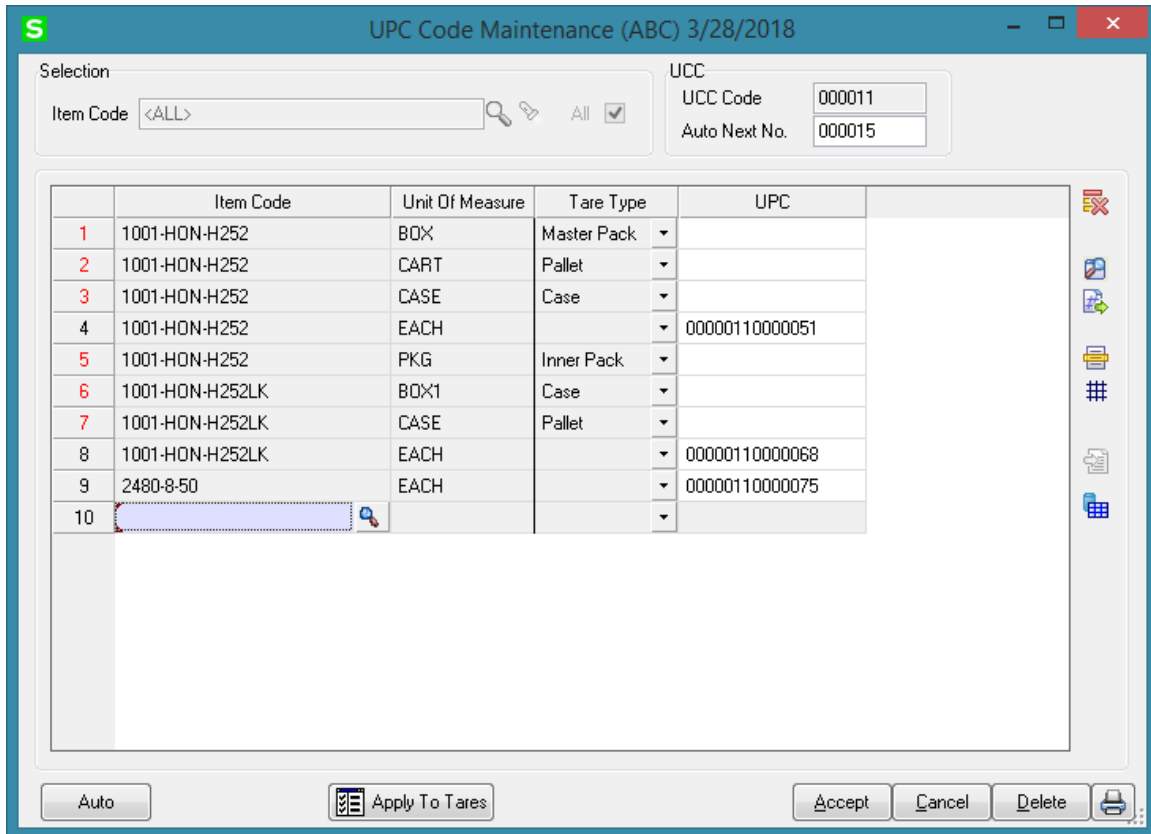
The **Load All Items with corresponding Tare Codes setup** button allows for loading into the grid all Items having Tare Types setup in the IIG Item Freight Packaging/Tare Fields.



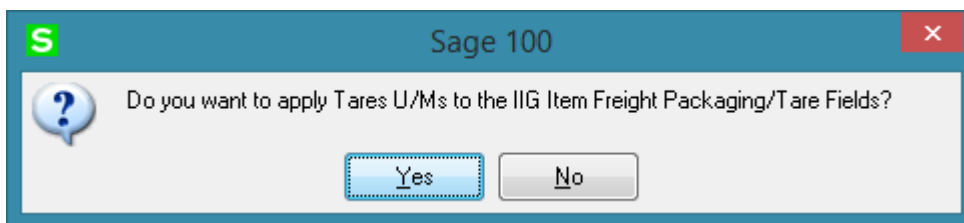


The **Load All Items with corresponding Tare Codes setup** button is enabled when Item Code selection is set to **All**.

Upon pressing the **Load All Items with corresponding Tare Codes setup** the Items having Tare Types (with a Unit of measure convertible to the Standard Unit of Measure) setup in the **IIG Item Freight Packaging/Tare Fields** are loaded in the grid.



The **Apply To Tares** button allows for updating the Tare Codes in the **IIG Item Freight Packaging/Tare Fields**. If the Unit of Measure and the Tare Type is added/changed for an Item in the UPC Code Maintenance, the changes can be applied to the IIG Item Freight Packaging/Tare Fields by pressing the **Apply To Tares** button. The following message appears upon pressing the **Apply To Tares** button:



Selecting Yes updates the Tare fields values in the **IIG Item Freight Packaging/Tare Fields** screen.

Here is an example of how Item Tare fields' values are updated after applying changes done in the UPC Code Maintenance:

Item Code: 2480-8-50    DESK FILE 8" CAP 50

Packaging/Tare

Ship as one box

	U/M	Box Code	Length	Width	Height	Default
Each Tare	EACH					<input type="checkbox"/>
Case Pack Tare						<input type="checkbox"/>
Master Pack Tare						<input type="checkbox"/>
Pallet Pack Tare						<input type="checkbox"/>
Inner Pack Tare						<input type="checkbox"/>

Buttons: OK, Cancel

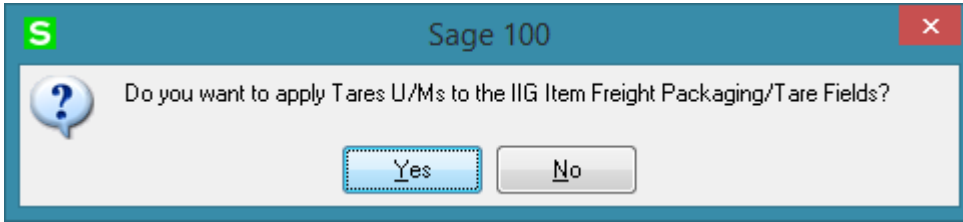
Tare Type UPC codes are added for an Item in the **UPC Code Maintenance**:

Selection: Item Code <ALL>    UCC: UCC Code 000011, Auto Next No. 000015

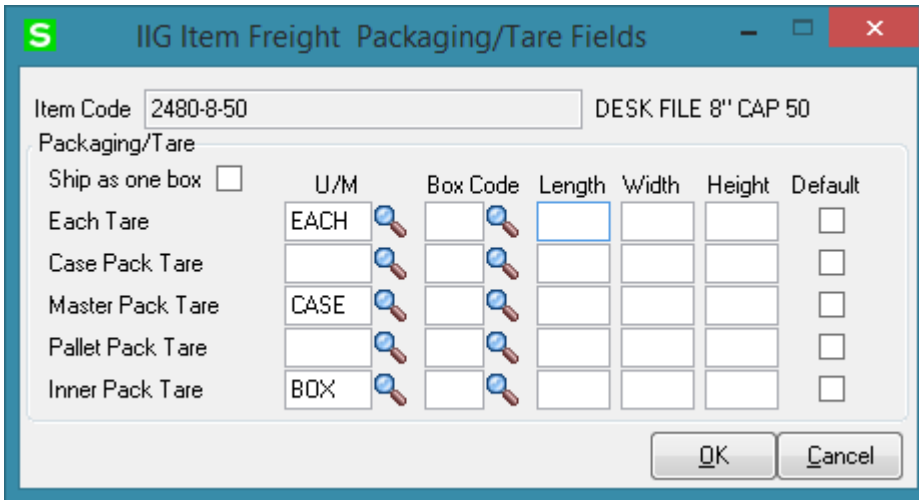
	Item Code	Unit Of Measure	Tare Type	UPC
1	1001-HON-H252	BOX	Master Pack	60000110000053
2	1001-HON-H252	CART	Pallet	70000110000050
3	1001-HON-H252	CASE	Case	50000110000056
4	1001-HON-H252	EACH		00000110000051
5	1001-HON-H252	PKG	Inner Pack	30000110000052
6	1001-HON-H252LK	BOX1	Case	50000110000063
7	1001-HON-H252LK	CASE	Pallet	70000110000067
8	1001-HON-H252LK	EACH		00000110000068
9	2480-8-50	EACH		00000110000075
10	2480-8-50	BOX	Inner Pack	30000110000076
11	2480-8-50	CASE	Master Pack	60000110000077
12				

Buttons: Auto, Apply To Tares, Accept, Cancel, Delete

Tooltip: Apply U/Ms to the IIG Item Freight Packaging/Tare Fields



Here is how the **IIG Item Freight Packaging/Tare Fields** values are updated after applying Tare U/M-s.



The UPC code scanning (for EACH UOM) is supported in the Order Picking Entry.

## Visual Integrator

The files listed below have been added, or changed, in the Data Dictionary by WMS enhancement for Visual Integrator purposes.

### Tables

IM068\_WMSUPCCodeMasterFile

### Fields

ItemCode  
UnitOfMeasure  
LotSerialNo  
UpcCode  
TareType

IM068\_WMSUPCItemLabelGenHeader

DocumentNo  
LotExpirationDefaultDate  
APDivisionNo  
VendorNo  
Comment

IM068\_WMSUPCItemLabelGenDetail

DocumentNo  
LineKey  
ItemCode  
Valuation  
WarehouseCode  
LotSerialNo  
LotExpirationDate  
PurchaseOrderNo  
UnitOfMeasure  
LabelQuantity  
LabelsToPrint

## ODBC Dictionary

The files listed below have been added or changed in the ODBC Dictionaries by this enhancement for Crystal Reports purposes.

### Tables

IM\_InventoryLabelsWrk

### Fields

IM068\_WMSUPCBaseCode  
IM068\_WMSUPCInnerPackCode  
IM068\_WMSUPCCaseCode  
IM068\_WMSUPCMasterPackCode  
IM068\_WMSUPCPalletCode  
IM068\_WMSUPCVariableCode

	IM068_WMSUPCLotExpirationDate
	IM068_WMSUPCPurchaseOrderNo
IM_ReceiptLabelsWork	IM068_WMSUPCBaseCode
	IM068_WMSUPCInnerPackCode
	IM068_WMSUPCCaseCode
	IM068_WMSUPCMasterPackCode
	IM068_WMSUPCPalletCode
	IM068_WMSUPCVariableCode
	IM068_WMSUPCLotExpirationDate
	IM068_WMSUPCPurchaseOrderNo