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AMI AutoAGENT

AutoAGENT
Warehouse Management

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INTRODUCTION

Introduction

Welcome to AutoAGENT Warehouse Management an important component within AutoAGENT. AutoAGENT Warehouse Management system spans the areas of warehouse resource management, warehouse configuration, task management, advanced and pick methodologies.

AutoAGENT Warehouse Management optimizes the material handling business processes for warehouses, manufacturing facilities, and distribution centers. AutoAGENT Warehouse Management supports both paper-based and automated environments with material handling systems and radio frequency (RF) hand-held computers.

AutoAGENT Warehouse Management also provides an easy-to-use interface for mobile, wireless hand-held computers. Mobility, process automation, and bar code scanning greatly improve the efficiency of the Supply Chain Logistics business processes.

Features of AutoAGENT Warehouse Management

AutoAGENT Warehouse Management gives your organization the ability to leverage the Inventory BIN, lot and serial, functionality of Dynamics GP Inventory, Purchasing and AutoAGENT Ship Scheduler, Shipping Manager, and Shop Floor Manager. All inventory movements including, rezoning, picking for shipments, picking for production, will be facilitated via the scanning of barcode labels for all containers and palletized inventory.

- Lot Linking
- Receiving Inbound Material / Components
- Rezoning
- Pick for Production
- Pick for Shipping

Warehouse Management provides for seamless integration to key AutoAGENT Modules including:

- Inventory
- Barcode Manager
- Ship Scheduler
- Production Manager
- Shop Floor Manager
- Manufacturing

What's in this manual?





This manual is designed to give you an in-depth understanding of how to use the features of the Warehouse Management, and how it integrates with the AutoAGENT.

The manual is divided into the following parts:

- [Part 1, Warehouse Management Location Setup](#), introduces Warehouse Management and explains the setup of the module.
- [Part 2, Receiving Inbound](#), provides information about receiving inbound material and components from vendors.
- [Part 3, Lot Linking](#), provides information about linking inbound vendor lot numbers to Warehouse Management lot number.
- [Part 4, Pick for Production](#), provides for information about picking material and components for production work centers.
- [Part 4, Pick for Shipping](#), provides for information about picking finished goods to stage for shipping.

Symbols and Conventions

This manual uses the following symbols to highlight specific types of information.

	<p>Light Bulb - The light bulb symbol indicates helpful tips, shortcuts, and suggestions.</p>
	<p>Warning Symbol - The warning symbol indicates situations you should be especially aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information may be affected.</p>
	<p>Drop-down button - This button allows you to select a single option from a list by clicking the arrow button to the right of the field.</p> <p>See AutoAGENT Setup User Guide for more navigation and windows tips.</p>
	<p>Lookup button - The lookup button indicates that a lookup window – a list of items already entered in the system – is available for a particular field or window. You’ll select an item from the list to enter in the window.</p> <p>See AutoAGENT Setup User Guide for more navigation and windows tips.</p>

This manual uses the following conventions to refer to sections, navigation and other information.

<p><i>Building a Template</i></p>	<p>Italicized type indicates the name of a section or procedure.</p>
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File >>Print	The (>>) symbol indicates a sequence of actions, such as choosing items from a menu or a toolbar or choosing buttons in a window. This example directs you to pick File and then pick Print.
TAB or ENTER	Small capital letters indicate a key or a key sequence.
Underlined characters/fields on screen	An underlined field title on the screen indicates the ability to click on it to link to the screen where the record can be updated

**PART 1: Warehouse Management LOCATION SETUP and
CONFIGURATION**

Part 1: Warehouse Management Setup

You can setup up the Warehouse Management to the specific needs of your organization. This part of the documentation describes what you need to do to set up AutoAGENT Warehouse Management. This information includes the following topics:

This will require you to Setup and configure multiple modules with AutoAGENT including:

- Inventory
- Barcode Manager
- Manufacturing
- Production Manager
- Shop Floor Manager
- [Chapter 1, "Setup and Configuration"](#), describes how to set up Warehouse Management within AutoAGENT and Microsoft Dynamics GP.

Chapter 1: Inventory Warehouse Management Setup

The first step to Warehouse Management Setup is ready the inventory module to use Warehouse Management.

Inventory Control

The Dynamics GP Inventory Series used within AutoAGENT will require setup and configuration changes to utilize the Warehouse Management module. Following are the steps required to setup and configure Inventory Control for the Warehouse Management.

Inventory Setup for Warehouse Management

1. Open Inventory Control Setup
(Inventory >> Setup >> Inventory Control)

The screenshot shows the 'Inventory Control Setup' window. The 'User Category' is set to '1'. The 'Next Document Number' table is as follows:

Adjustment	00000000000000000005
Transfer	00000000000000000170
Variance	00000000000000000001
Production	00000000000000000001
In-Transit Transfer	000000000000000001

The 'Segment ID for Sites' is 'Segment1'. Under 'Allow:', 'Adjustment Overrides', 'Variance Overrides', and 'Transfer Overrides' are checked. 'Enable Multiple Bins' is checked and highlighted in yellow. 'Enable Picking Shortage Tasks' is unchecked. 'Autopost Stock Count Variances' and 'Use Existing Serial/Lot Numbers Only on Decrease and Transfer Transactions' are unchecked. 'Auto-assign Lot Numbers Based on' is set to 'Receipt Date'. Under 'Display:', 'Cost for Decrease Adjustments' is checked. Under 'Use Expired Lots in:', 'Inventory Adjustments and Transfers' and 'Other Transactions' are checked. The 'Classes' button is visible at the bottom right.

2. **Enable Multiple Bins** – Mark to use multiple bins. Turning on enable multiple bins will require all inventory movements with AutoAGENT to have a designated from and to bin to assign to the movement of inventory.
3. Press OK to save the change for enabling multiple bins.



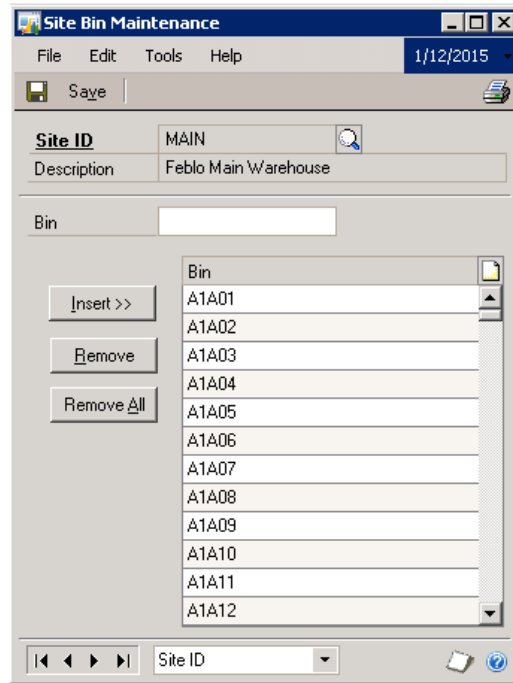
Once enable multiple bins is turned on, all inventory items for all sites will require a site-bin assignment.

Bins/Site

If you're using multiple bins, a bin must be specified for every transaction that involves inventory quantities: item transfers, purchase receipts, production transactions, shipments, and so on. You can define as many bins for each site as necessary. Later, you can transfer item quantities from one bin to another.

Bins/Site

1. Open Bins/Site
(Inventory >> Cards >> Bins/Site)



2. **Site ID** – Enter or select the site ID of MAIN. This is the default site for all inventory items within the AutoAGENT GP database.
3. **Bin** – Enter an up to 15 character (alpha numeric) Bin number and press the Insert button to assign this (new) Bin to the site of Main. Repeat this process for each new Bin to be entered.
4. **Save** - Press SAVE to save the changes.



You can add a note to any bin in the scrolling window. To do so, highlight the bin in the scrolling window and then choose the note icon button at the top of the scrolling window to open a note window. Enter information about the bin, being sure to save it before closing the window.

Item Class Setup

Use the Item Class Setup window to create and modify item classes. You can use item classes to help speed up data entry tasks when you're entering item records. You also can use item classes to "roll down" changes to the item class to all items that are members of the class.

Item Class Setup

1. Open Item Class Setup
(Tools >> Setup >> Inventory >> Item Class)

The screenshot shows the 'Item Class Setup' window with the following details:

- Class ID:** C-CAP
- Description:** Chrysler Button Caps
- Item Type:** Sales Inventory
- Valuation Method:** FIFO Periodic
- Track:** Lot Numbers
- Price Method:** Currency Amount
- Purchase Tax Option:** Nontaxable
- Quantity Decimals:** 0
- Currency Decimals:** (empty)
- U of M Schedule ID:** EA
- Price Group:** (empty)
- Default Price Level:** (empty)
- Sales Tax Option:** Nontaxable
- Tax Schedule ID:** (empty)
- Warn:** (unchecked)
- Days before lot expires:** 0
- Allow Back Orders:** (unchecked)
- Revalue Inventory for Cost Variance:** (unchecked)
- Tolerance Percentage:** 0.000%
- Maintain History:**
 - Calendar Year
 - Fiscal Year
 - Transaction
 - Distribution

2. **Class ID** – Enter or select the class ID that represents this inventory Item. For example C-CAP represents the Chrysler Button Caps class. Assigning this class to all Chrysler button cap items will ensure the correct general ledger accounts, currency and valuation method will be setup for the Chrysler Button Cap item.
3. **Save** – press save to save the item class record.

Chapter 2: Barcode Manager Warehouse Management Setup

The Barcode Manager stores all the barcode label formats within AutoAGENT to be used for receiving, shipping, shop floor reporting, and inventory control. Here you will be able to select and print individual bin location labels or ranges of labels to be used to identify the storage locations within your warehouse.

Bin Location Label

Allows you to look-up and select to print individual or ranges of bin location labels for each site.

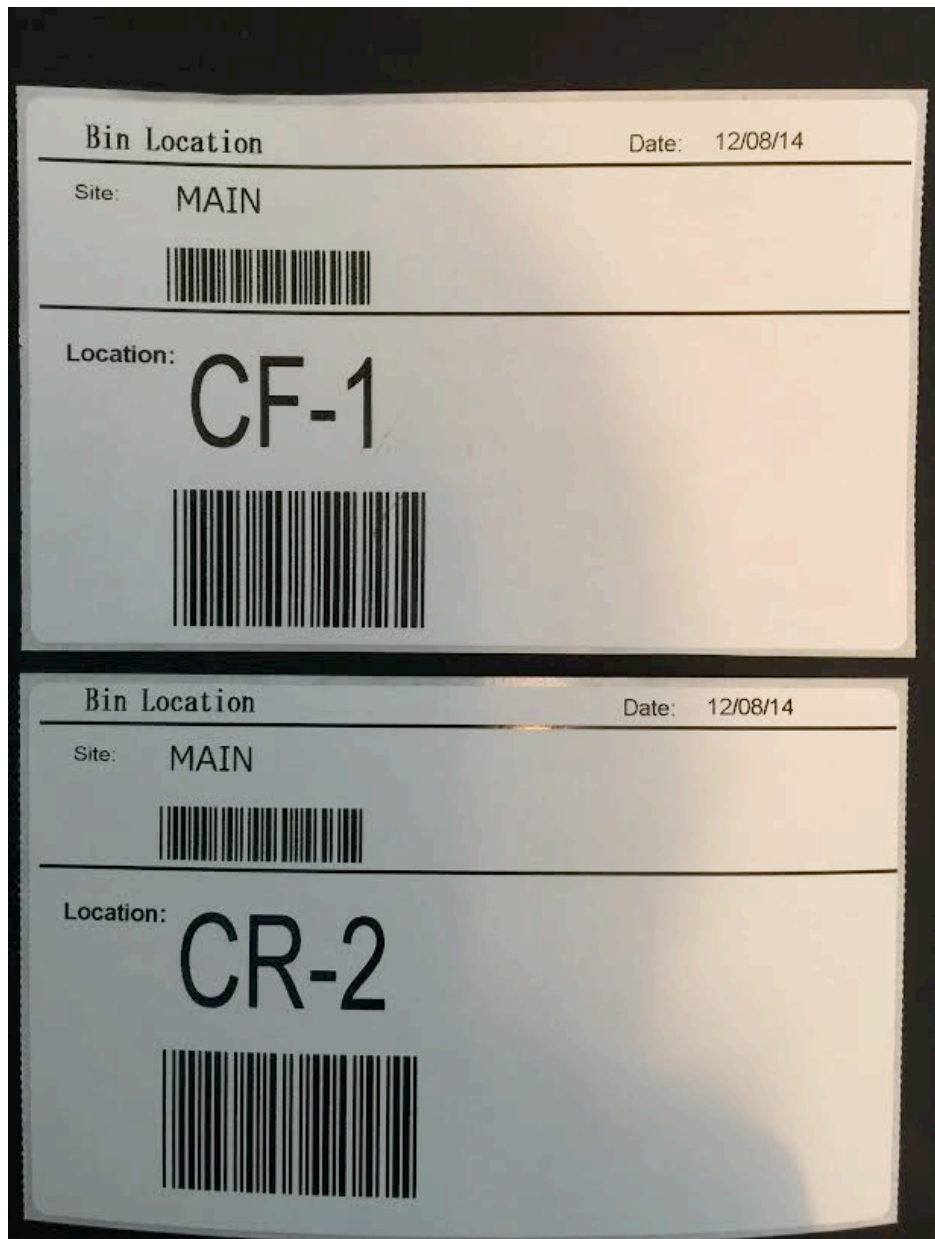
Barcode Manager for Warehouse Management

1. Open Bin Location Labels
(Barcode Manager >> Transactions >> Bin Location Labels)

The screenshot shows a software dialog box titled "Bin Location Labels." with a menu bar (File, Edit, Tools, Help) and a window title "markg Test Company (WMS) 12/5/2014". The dialog features a toolbar with "Cancel", "Clear", and "Print Label" buttons. It contains two main sections: "Site" and "Bin/Location". Each section has radio buttons for "All" and "From:". The "Site" section has "From:" and "To:" fields both set to "MAIN". The "Bin/Location" section has "From:" and "To:" fields set to "CR" and "CR-9" respectively. A "Number of Labels" field is set to "1". A "Ready" status bar is at the bottom.

2. **Site**– Enter or select the site **MAIN** for the (from and to) site range.
3. **Bin/Location** - Enter or select the bin location range to print bin locations labels for the corresponding bin location(s).
4. **Print Label** – press the print label button and select the appropriate barcode printer you wish to print the labels onto.

The following bin location label will print for the range of labels you selected.



Chapter 3: Setup Shop Floor Manager for Warehouse Management

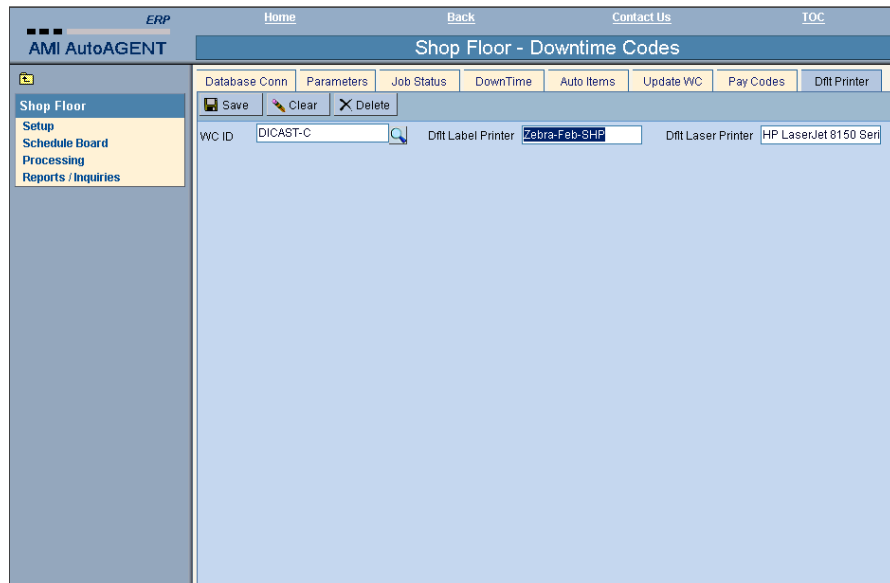
The Shop Floor Manager must be configured to use the Warehouse Management to allow pick lists to be printed for each job ticket (pick number) and for WIP labels to print to the appropriate barcode label printer for each work center defined within the Shop Floor Manager.

Shop Floor Manager – Work Center Default Printers

Define a default printer to print pick lists for each job ticket.

Shop Floor Manager for Warehouse Management

1. Open Default Printer for Shop Floor Work Center (Shop Floor Manager >> Setup >> Dflt Printer)



5. **WC ID**– Enter or select the work center ID to setup default printers.
6. **Dflt Label Printer** - Enter the name of the default barcode printer that is located in this work center. This name is synonymous with the name of the printer as defined in printer properties as follows:

Start >> Printers >> Right Click on the printer icon >> copy and paste printer name

7. **Dflt Laser Printer** - Enter the name of the default laser printer that is located in this work center.

- Each job ticket is assigned to a work center.
- Each job ticket has pick number.
- When the pick number is scanned a pick list report will print for the material handler to locate and pick the necessary components for this job ticket.
- The pick list will be printed on this printer located in this work center.

8. **Save** – Press Save to save the default printers.

Chapter 4: Setup Data Logic Scanners

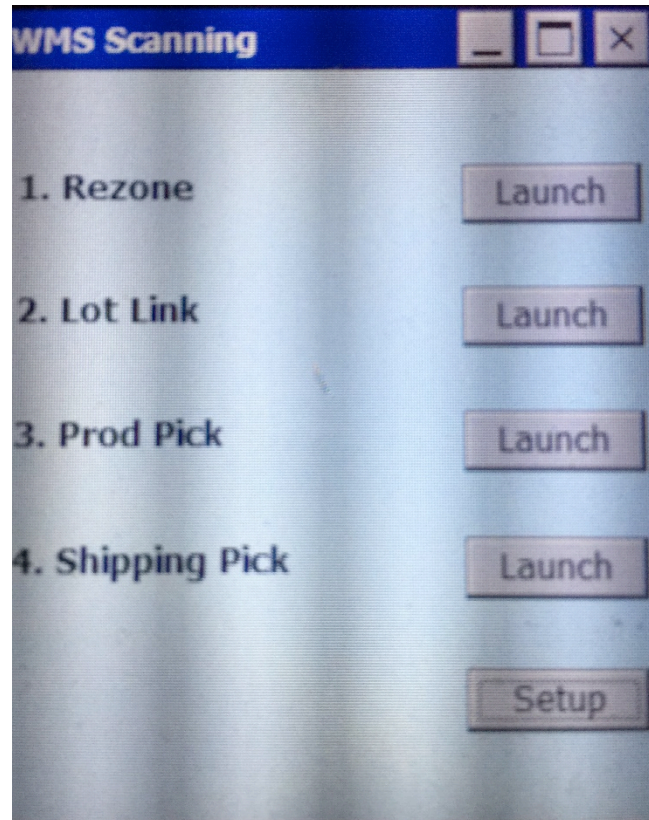
Warehouse Management utilizes hand held scanners to scan inventory locations and enter quantities for rezoning, picking for production, picking for shipping and processing job tickets. These hand held Data Logic scanners need to be configured for the Feblo shop floor environment before use. This setup routine must be performed for each new scanner or any scanner that may need to be reconfigured.

Data Logic Hand Held Scanner Setup

Each Data Logic hand-held scanner has a setup routine for the Warehouse Management modules on the scanner. The following instructions are to be followed for setting up a new scanner or reconfiguring an existing scanner.

Setup Data Logic Scanner

1. From the hand-held scanner default screen:
(Start >> Programs >> Warehouse Management Scanning



2. **Setup** - Press the Setup button to access the DATALOGIC scanner database configuration as pictured below:

The image shows a screenshot of a software setup window titled "Setup". The main section is "DATABASE CONFIGURATION". It contains five input fields: "Server" with the value "192.168.7.189", "Database" with "TCO", "User" with "sa", "Password" with "*****", and "Confirm Password" with "*****". At the bottom, there are three buttons: "Test", "Save", and "Clear".

3. **Server** – Enter the Feblo server IP address as follows: **192.168.189**
4. **Database** – Enter the database (3 character ID) as follows: **FEB**
5. **User** - Enter the User ID of system administrator as follows: **sa**
6. **Password** – Enter the password as follows: **Feblo1**
7. **Confirm Password** – Enter again as follows: **Feblo1**
8. **Test** – Press the Test button to test connection to database. If successful:
9. **Save** – Press save button to save configuration changes.

Trouble Shooting – DATALOGIC Scanner

If the scanner loses connection to the database immediately Call AMI for technical support. Rebooting the scanner may cause the Warehouse Management scanning application to be reconfigured for the Feblo database.

Mike Makled 313-937-5000 x 1117

Mark Gentile 248-318-3812 cell

Jim Thayer 313-937-5000 x 0 ask Joanne to contact Jim immediately

Part 2: Transaction Entry

This part of the documentation includes information about performing Warehouse Management transactions. This information includes the following topics:

- [Chapter 5, “Warehouse Management Scanning”](#), describes how to perform Warehouse Management scanning options within AutoAGENT Warehouse Management.
 1. Rezone
 2. Lot Link
 3. Production Pick
 4. Shipping Pick

- [Chapter 6, “Receiving Components in Warehouse Management”](#), describes how to receive inbound material and components, using the Warehouse Management functionality with AutoAGENT.
 1. [Master Pack Label](#)
 2. [Master Pack Safety Label](#)
 3. [Single Pack Label](#)
 4. [Single Pack Safety Label](#)
 5. [Mixed Load Label](#)

Chapter 5: Rezone

Use the Rezone option within the Warehouse Management scanning to



Each customer may require slightly different information for their own Warehouse Management Location label formats. This documentation is to be used as a guideline for how to manually enter each Warehouse Management (label type) for the majority of the fields required for the selected label type. Refer to the appendix A for the additional field descriptions for each customer label type that may not be defined here.

To Perform Manual Warehouse Management Location Data Entry:

1. Open the Manual Warehouse Management Location Data Entry Window.
(Transactions>> AutoAGENT >> Warehouse Management Location >> Manual Warehouse Management Location Data Entry)