



# Warehousing





# **Warehousing Tasks**

Goods Receipt
Put-Away
Stock Relocation

### **Physical Inventory**

Work w/ Physical Inventories

#### **Product Tools**

- Product Review
- Product Kardex
- Stock Location

### **Picking Tickets**

- Printing (Print Station)
- Generating & Printing
- Verifying

### **Pending Shipment Register**

### **Shipping Setup**

- Delivery Routes
- Shipping Vehicles
- Trip Templates

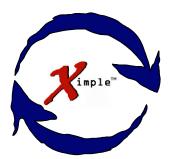


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# **The Warehouse Scenario**



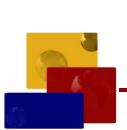
Shipping/Receiving



Inventory/Sales



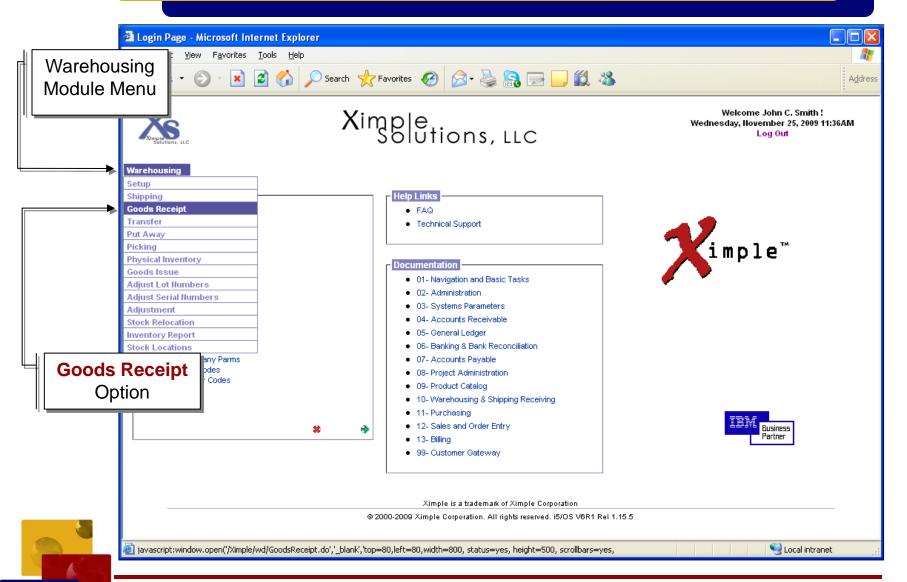
**Put Away** 



Picking/Packaging

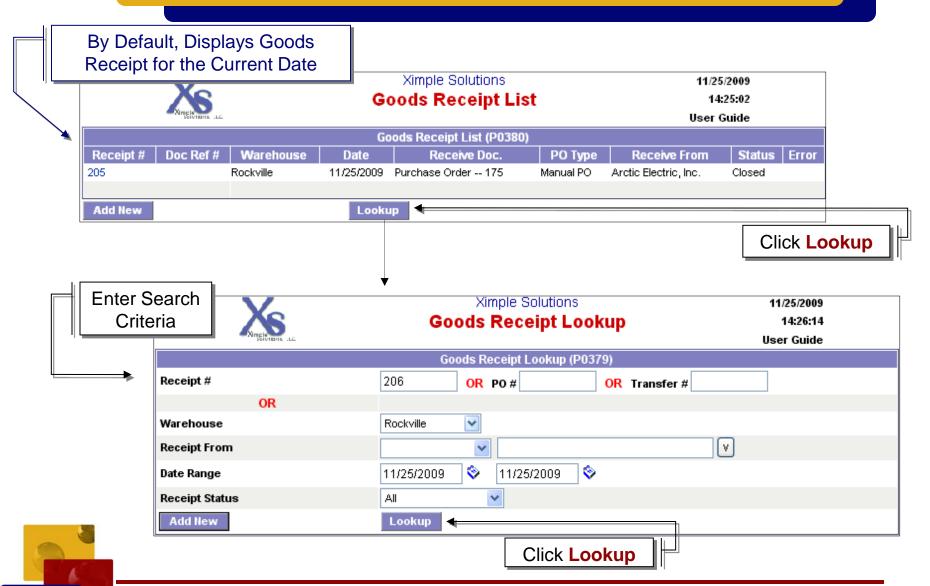


# **Goods Receipt**





# Goods Receipt - Lookup





# **Goods Receipt – Verify**



**Popup Menu:** 

**View:** View goods receipt information

**Edit:** Edit goods receipt (Received Doc # & WH cannot be edited)

**Delete:** Delete goods receipt

**Verify:** Verify receipt (check for errors)

**Complete:** Complete goods receipt process

**Print:** Generate pdf file of goods receipt

**Putaway Ticket:** Generates pdf file of putaway ticket

**Vendor Wrong/Sub Report:** Generates pdf file of items received in

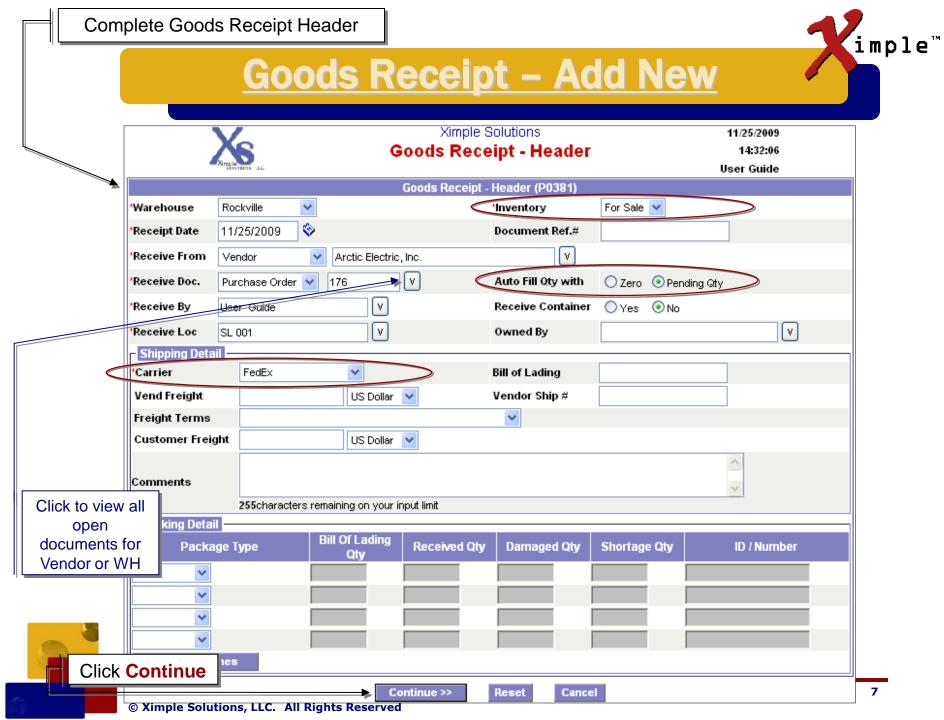
error or substitute

**Short/Over/Dmg Report:** Generates pdf file of items received

damaged or wrong quantity



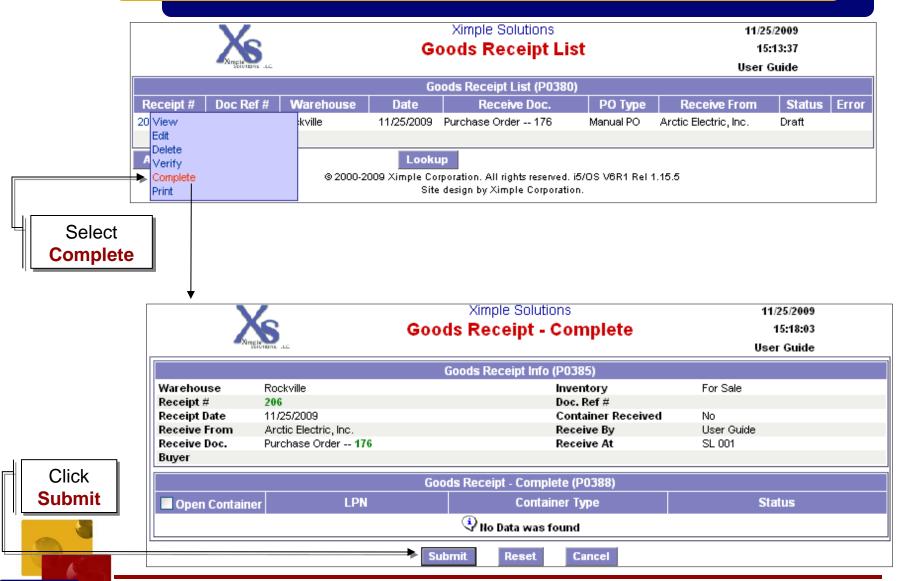
Add New





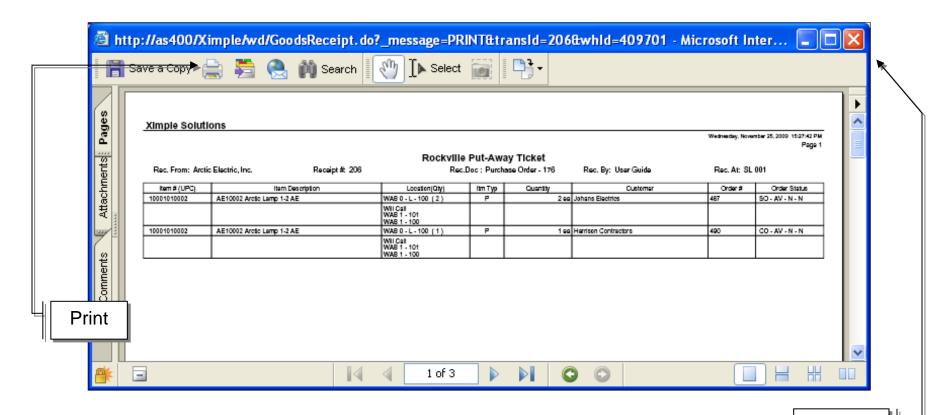


# **Goods Receipt - Post**





# Goods Receipt - (Put-Away Ticket)



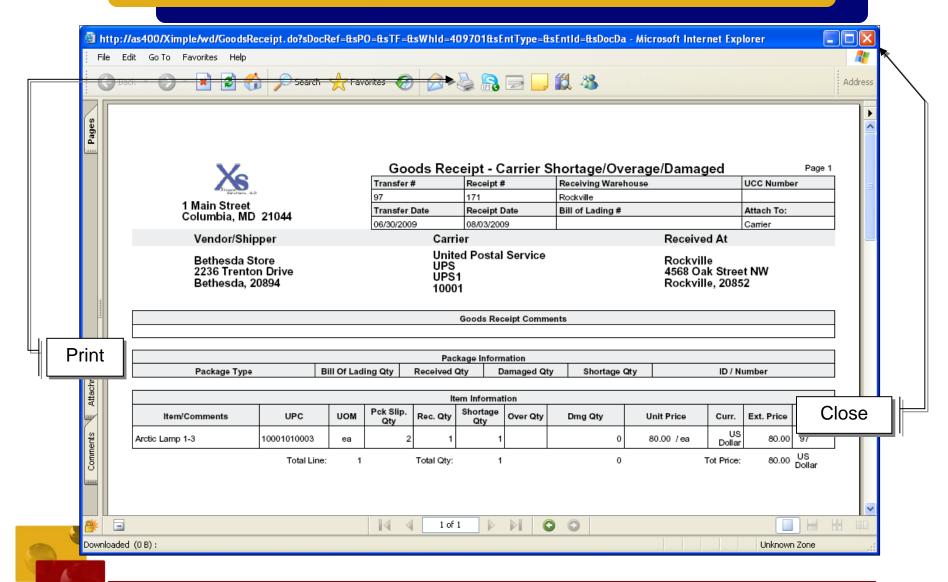
#### **Item Types**

- X = Seasonal
- T = Temporary (When Stock Item flag = N -> Checked at the product level only)
- P = Permanent (all other cases)



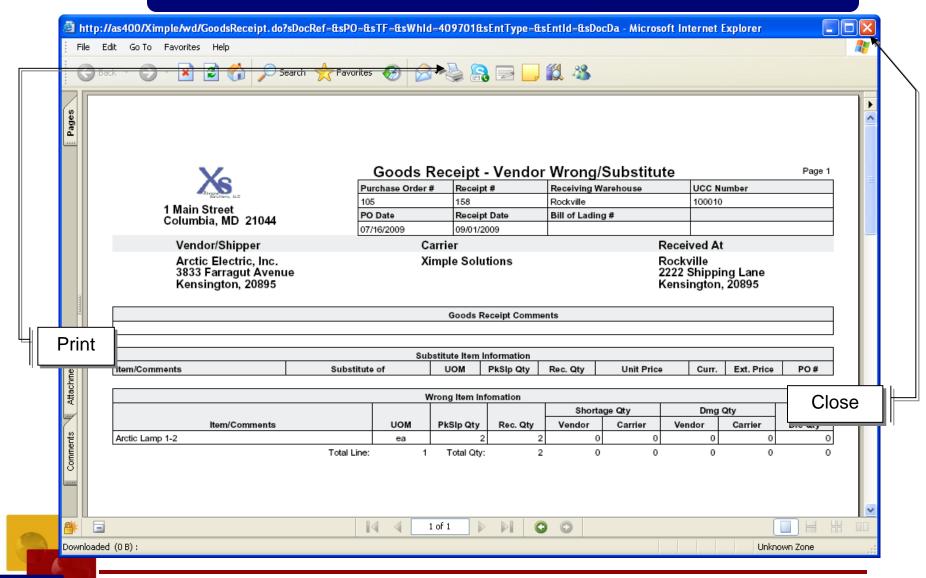
Close

# Goods Receipt - (Short/Over/Dmg Report)



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# Goods Receipt - (Vendor Wrong/Sub Report)



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# GR - Certification 1

## 1. Lookup Goods Receipt

## 2. Enter Goods Receipt

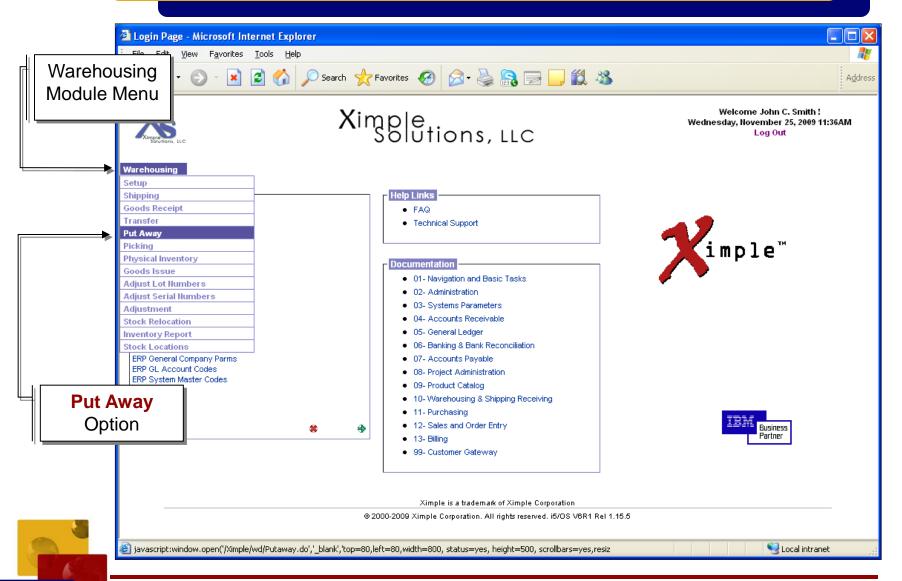
- Pending Qty
- Zero Qty
- Receive in Short / Over
- Wrong Items

## 3. Print GR Reports



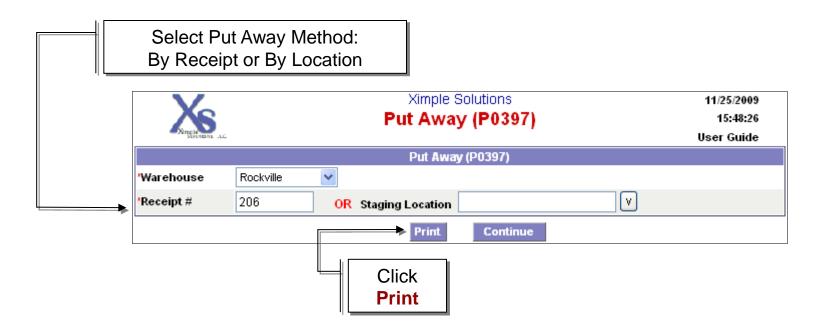


# **Put Away Ticket**





# **Print Put Away Ticket**







# **Print Put Away Ticket**

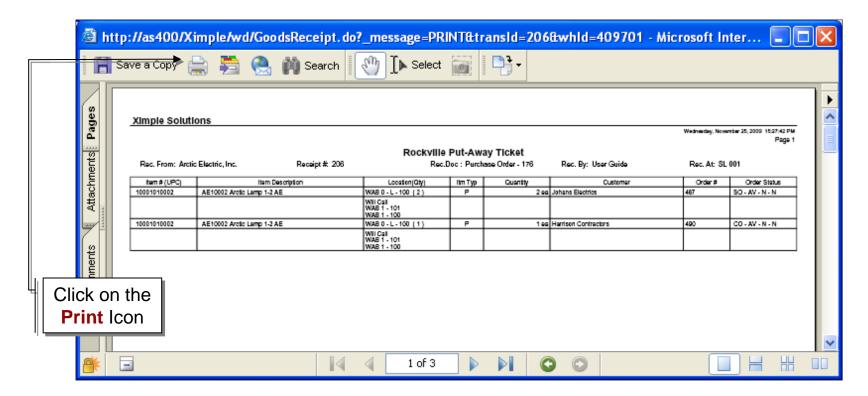
### <u>Tickets – Item Groupings</u>

- **Group 1:** Products received that are already committed to a sales order or to a transfer order.
- Group 2: Products with no stock location assigned (these can be stock type P or T).
- Group 3: Products with a stock location already in the system (either because they are in stock or predefined). These are further printed by Zone. For example, your warehouse has five zones, and you GR has five items, each of them stocked in a different zone. When you go to print the put away ticket you will generate five pages, one for each item that is located in a different zone.





# **Print Put Away Ticket**



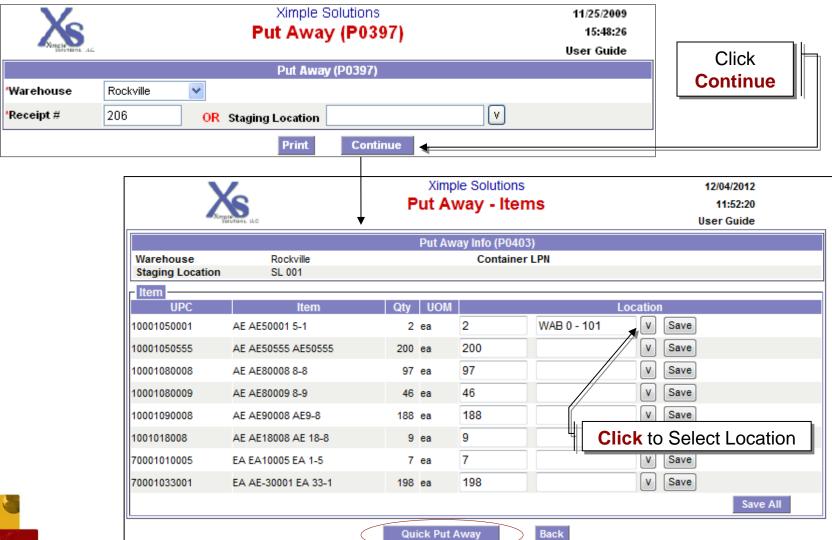
### **Item Types**

- X = Seasonal
- T = Temporary (When Stock Item flag = N -> Checked at the product level only)
- P = Permanent (all other cases)





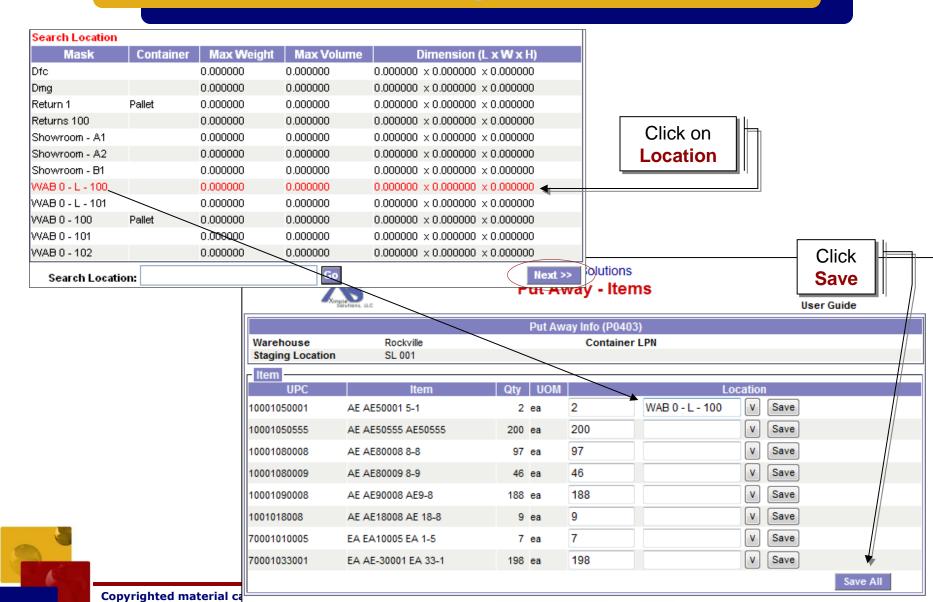
# **Put Away Item**





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# **Put Away Item**



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Back

**Quick Put Away** 



# Put Away - Certification <sup>2</sup>

## 1. Print Put Away Tickets

- By Specific Goods Receipt
- By Location

## 2. Put Away Items

- For Specific GR
- For Location



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# **Pick Tickets & Picking**

### **Printing: 2 Ways:**

- 1. Setup Print station to automatically print out generated pick tickets (computer that will create the pdf file and send that file to the printer)
- 2. Call Out pick tickets one at a time using the Queue Control

### **Generating & Picking:**

• Generate pick tickets for Sales Orders, Transfers and Goods Issues as well as print or reprint generated tickets.

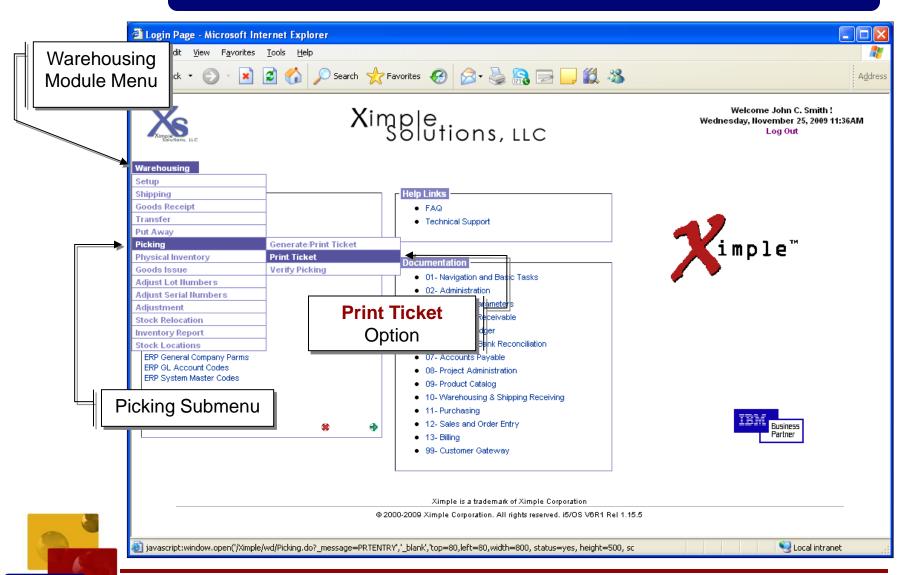
### **Verifying:**

Verify the picking of goods and close the pick ticket.





# **Setup Print Station**





# **Setup Print Station**

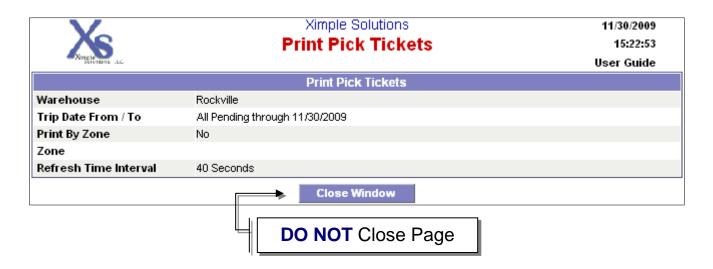
V	Ximple Solutions	11/30/2009								
78	Print Pick Tickets	15:22:34								
Xmcle solvitons .LC		User Guide								
Print Pick Tickets										
'Select Warehouse	Rockville									
*Trip Date From / To	<b>\$</b> 11/30/2009									
Print By Zone										
Zone	V	No Zone Only								
Refresh in Seconds	40 (Minimum 40 Seconds)									
	Continue >>									
	Click Continue'									

**Note:** Will only generate pdf for tickets that <u>HAVE NOT</u> been printed.





# **Setup Print Station**

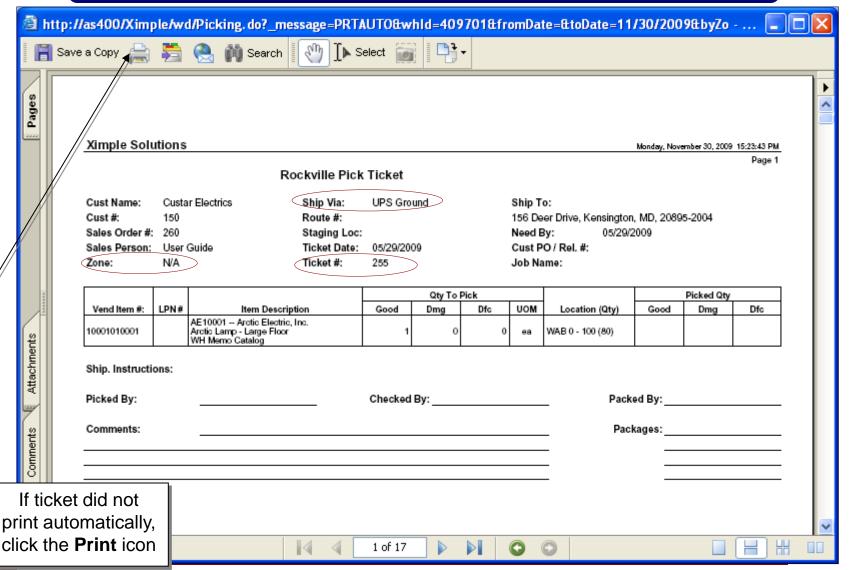


Note: Closing this page will close the print client. Any tickets that were sent to the client that did not generate pdf due to client being closed prior to the pdf being generated WILL be MARKED as PRINTED.



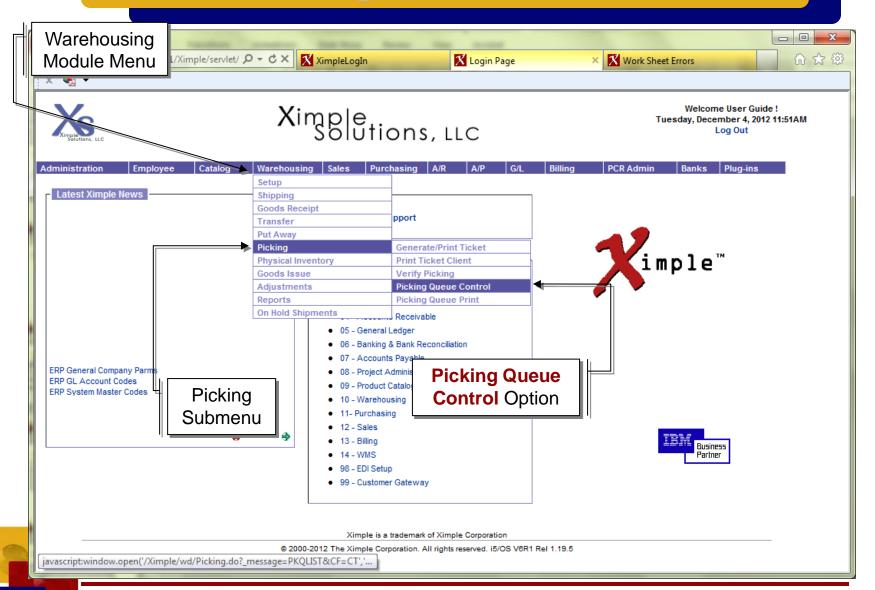


## **Print Pick Ticket**





# **Picking Queue Control**





# Picking Queue Control (Mngrs)

Click **Print** 

Warehouse

# Ximple Solutions 2 10/05/2012 Picking Print Queue 12:08:54 User Guide

	400	more											
Refresh Print Next													
Ticket#	Line Cnt	Ticket Date	Trip#	Doc Type	Doc.#	Customer	Need By	Ship Method	Ship Priority	Sales Person	Current Priority	Change Priority	
1331	1	09/14/2012		Sales Order	1581	Custar Electric	09/14/2012	UPS Ground	Normal	User Guide	High 1	Chg To	•
1343	1	09/17/2012	426	Sales Order	990	A K Steel Corporation	09/21/2010	Our Truck	Normal	Ina Schoffstall	High 2	Chg To	-
1348	1	09/18/2012		Sales Order	1560	Custar Electric	09/10/2012	UPS Ground	Normal	User Guide	High 2	Chg To	•
1352	1	09/18/2012	430	Other Issue	4566	Arctic Electric	09/05/2012	Our Truck 27	Normal		Low 2	Chg To	-
1364	1	09/19/2012	435	Other Issue	4560	RX Romex	09/05/2012		Normal		Low 2	Chg To	•
1365	1	09/19/2012	436	Other Issue	4867	Norfolk Southern Corp	09/19/2012	Best Way	Normal		Low 2	Chg To	•
1371	1	09/20/2012	441	Sales Order	1635	Buch Electric Company	09/20/2012	Best Way	Normal	Lisa Nybeck	High 1	Chg To	•
1369	1	09/20/2012	214	Sales Order	1505	*arthur	04/24/2012	Will Call		User Guide	High 2	Chg To	-
													_



Tickets are sorted by Date (ascending order) and then by Priority level.

#### **Example:**

Sales Order

Sales Order

Sales Order

Sales Order

Sales Order

09/20/2012 440

09/20/2012 437

09/21/2012 214

09/21/2012 443

10/04/2012 444

Date	Ticket#	Priority
08/01/12	2	High 1
08/01/12	1	Low 2
08/05/12	4	Low 1
08/07/12	5	High 2
08/07/12	7	High 2
08/09/12	10	High 1



1370

1366

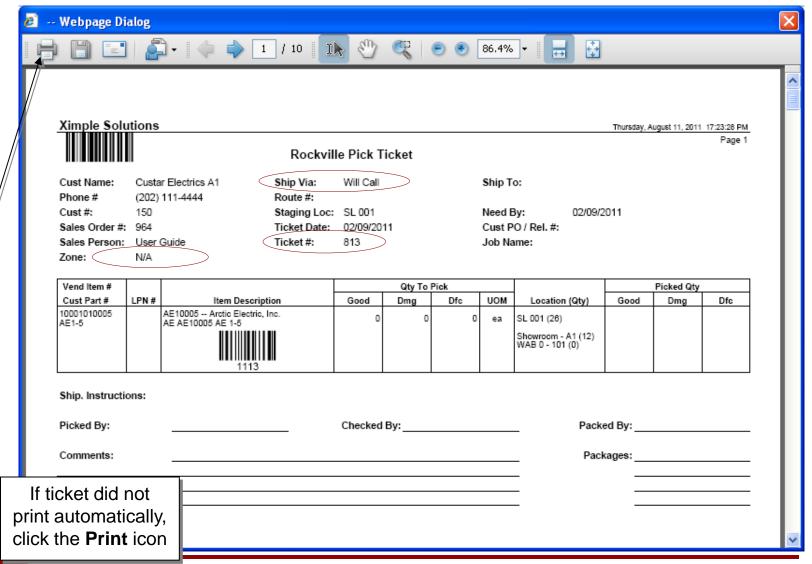
1372

1374

1375

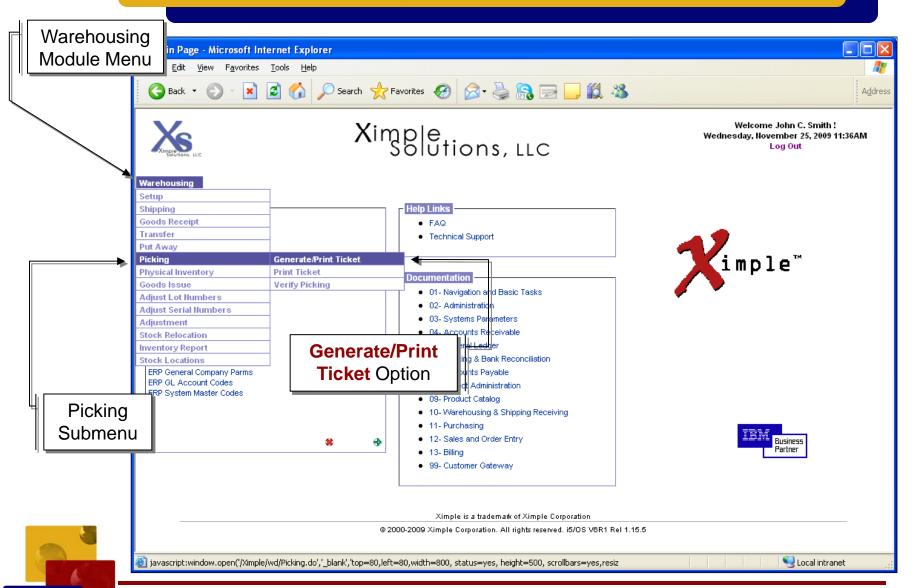


## **Print Pick Ticket**



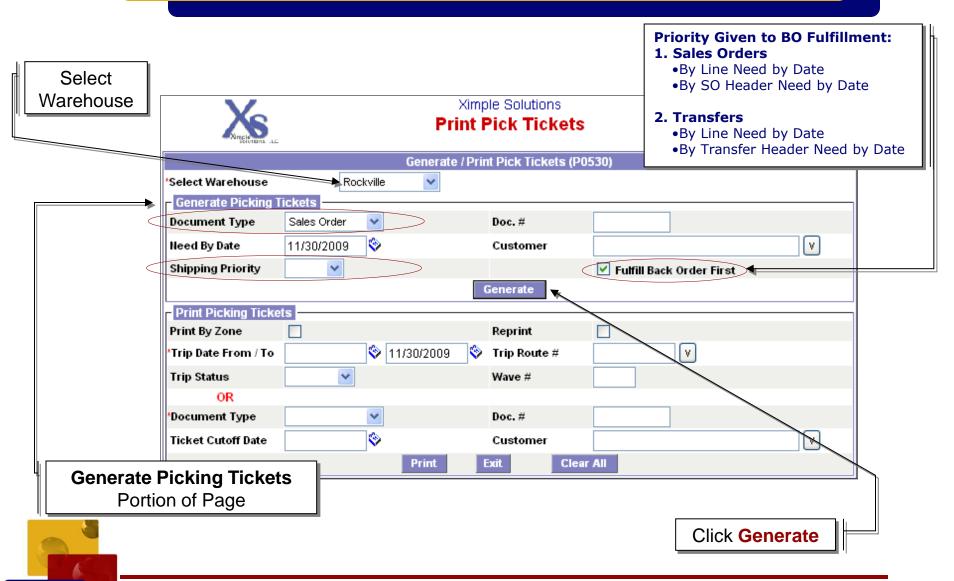


# **Generate/Print Pick Ticket**



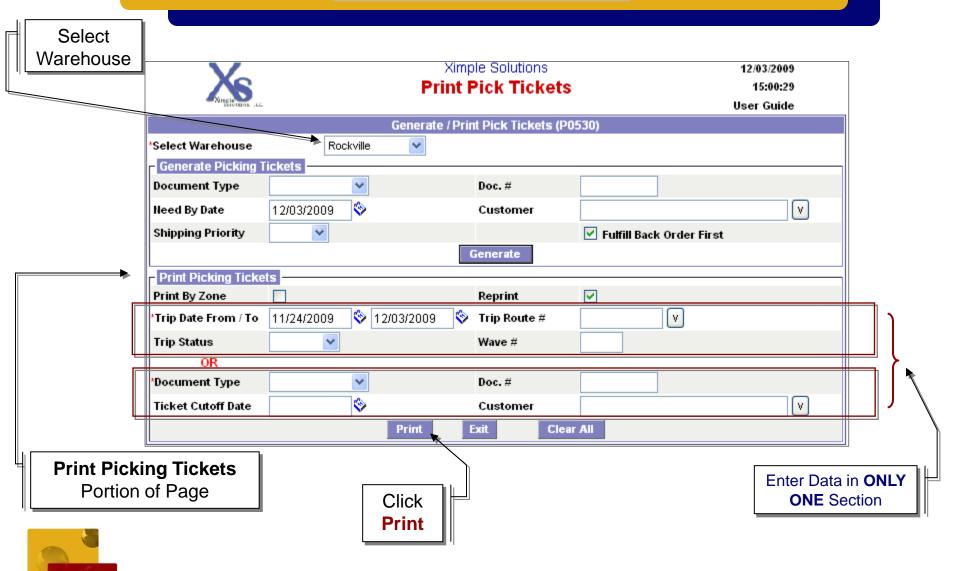


# **Generate Pick Ticket**



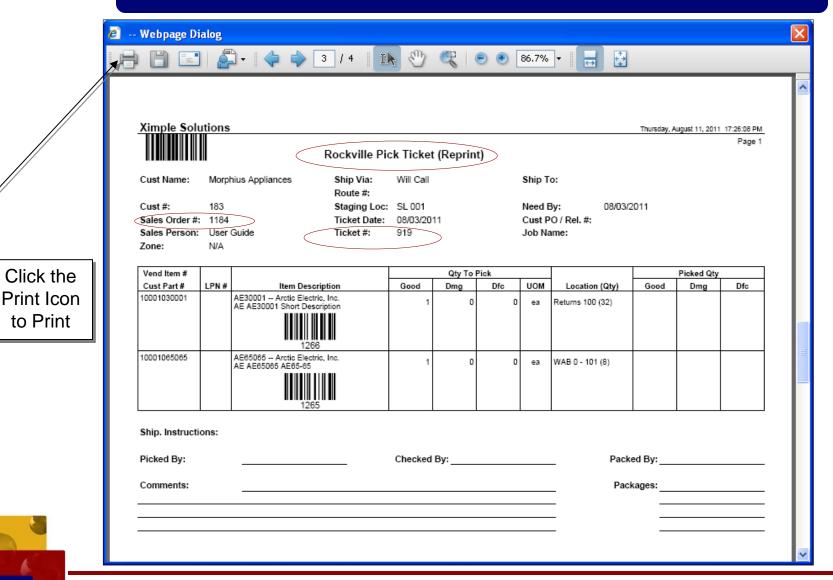


# **Print Pick Ticket**





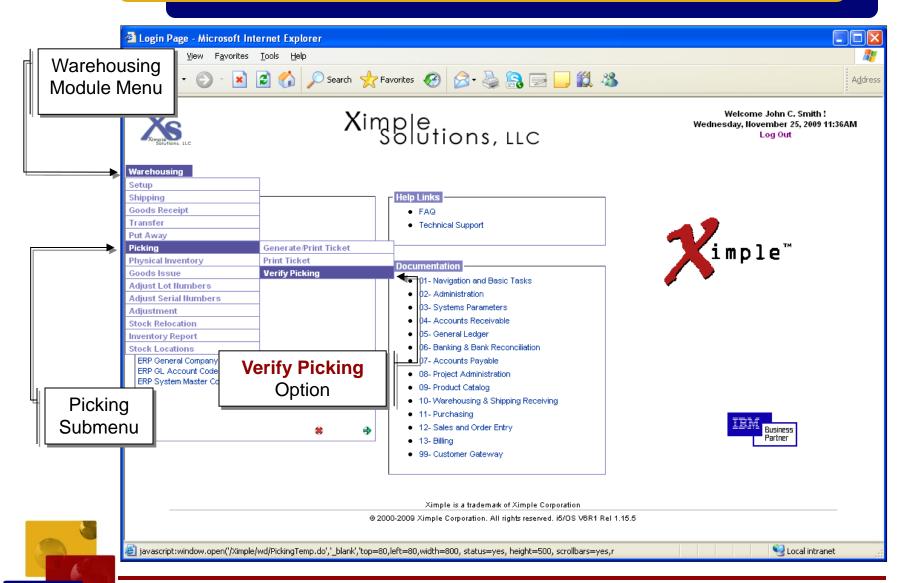
# **Print Pick Ticket**







# **Verify Picking**





# **Verify Picking – Ticket List**



Ximple TEST - CLOUD

**Picking Ticket List** 

08/29/2017 10:58:36 Ximple Admin

										Ample Admin				
* Back	Order	Ticket	🔥 Has	Cancel	Qty									
Ticket	#Trip#	Ticket Dat	te Store	Doc	. Type	Doc.#	Doc. Ref	Entity	Ship. Method	Sales Rep	Status		ick 3y	
1304	363	08/24/2017	Harrisburg	Sales	Order	1639	N/A	Barton Electric 1A	Our Trucks	Ximple Admin	Not Started	No		
1303	363	08/24/2017	Harrisburg	Sales	Order	1636	N/A	Barton Electric 1A	Our Trucks	Ximple Admin	Not Started	No		
1302	363	08/24/2017	Harrisburg	Sales	Order	1640	N/A	Barton Electric 1A	Our Trucks	Ximple Admin	Not Started	No		
1301	363	08/24/2017	Harrisburg	Sales	Order	1637	N/A	Barton Electric 1A	Our Trucks	Ximple Admin	Not Started	No		
1300	362	08/23/2017	Harrisburg	Sales	Order	1638	N/A	Barton Electric 1A	Our Trucks	Ximple Admin	Not Started	No		
1298	361	08/21/2017	Harrisburg	Sales	Order	1631	N/A	Barton Electric 1A	Our Trucks	Ximple Admin	Not Started	No		
1291	358	08/07/2017	Harrisburg	Sales	Order	1532	N/A	Barton Electric 1A	Our Trucks	Ximple Admin	Not Started	Yes		
1290	357	08/07/2017	Harrisburg	Sales	Order	750	Yyyyy	Steiners Construction	Our Trucks	Ximple Admin	Not Started	Yes		
1284	356	07/25/2017	Harrisburg	Sales	Order	1148	N/A	Barton Electric 1A	FAST	Ximple Admin	Not Started	Yes		
1283	356	07/25/2017	Harrisburg	Sales	Order	1106	N/A	Barton Electric 1A	FAST	Ximple Admin	Not Started	No		
1263	352	06/13/2017	Harrisburg	Sales	Order	1593	test	Milton Hershey Medical C	Center UPS Groun	dXimple Admin	Not Started	Yes		
1254	351	06/12/2017	Harrisburg	Transf	er Orde	r56	N/A	Lebanon	Our Trucks	1	Not Started	Yes		
1253	350	06/10/2017	Harrisburg	Sales	Order	750	Yyyyy	Steiners Construction	Our Trucks	Ximple Admin	Not Started	Yes		
1213	339	03/30/2017	Harrisburg	Sales	Order	1526	1234	Barton Electric 1A	Our Trucks	Ximple Admin	Not Started	Yes		
1204	338	03/29/2017	Harrisburg	Sales	Order	1303	sam	Snap Drape Brands	UPS Groun	dTraining 01 N	Not Started	Yes		
1191	327	03/16/2017	Harrisburg	Sales	Order	1500	ALLOW BO	Custar Electric	Our Trucks	Ximple Admin	Not Started	Yes		
1187	326	02/20/2017	Harrisburg	Sales	Order	1493	N/A	Barton Electric 1A	Our Trucks	Ximple Admin	Not Started	Yes		
1178	321	01/05/2017	Harrisburg	Sales	Order	1475	N/A	Barton Electric 1A	Our Trucks	Ximple Admin	Not Started	Yes		
1176	319	12/13/2016	Harrisburg	Sales	Order	750	Yуууу	Steiners Construction	Our Trucks	Ximple Admin	Not Started	Yes		
1153	299	12/05/2016	Harrisburg	Sales	Order	1441	1231211231	FORD HOTEL SUPPLY	UPS Blue	Training 01	Not Started	Yes		
Ticket	#	Orde	r#	G	o St	ow N	on-Pickup ▼	Refresh	Back To Looku	Repo	rt Low Stk	Next >>	1	

**Note:** By default, this page displays tickets for:

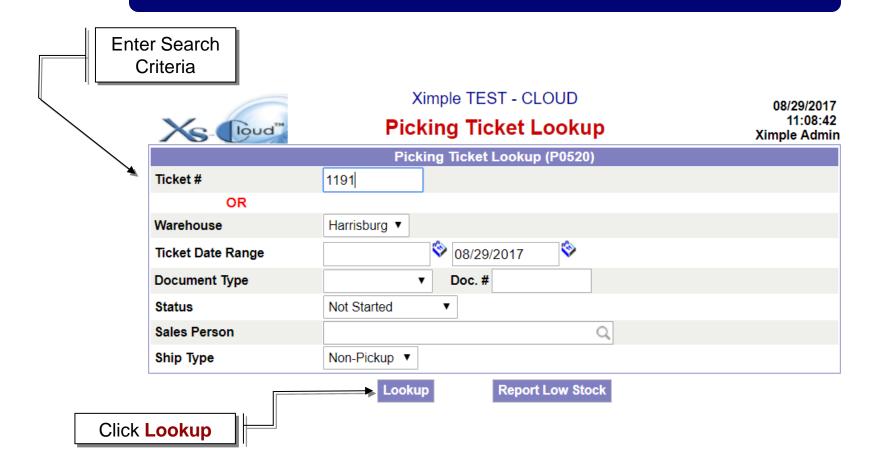
- Status = Not Started
- Default WH set by employee

Click **Back** to go to Lookup Pick Ticket Page





# **Verify Picking - Lookup**







# <u>Verify Picking – Verify</u>



**View:** View pick ticket information

**Verify:** Verify picking of items.

To be Printed: Resend ticket to printer (option only for WC Counter SO).

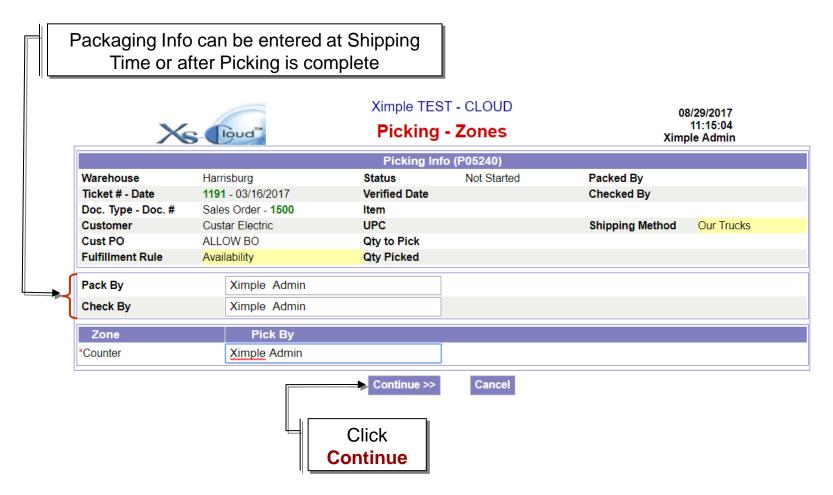
**Trip #:** Link to Shipment Packaging Information page.

Doc #: Link to Document.





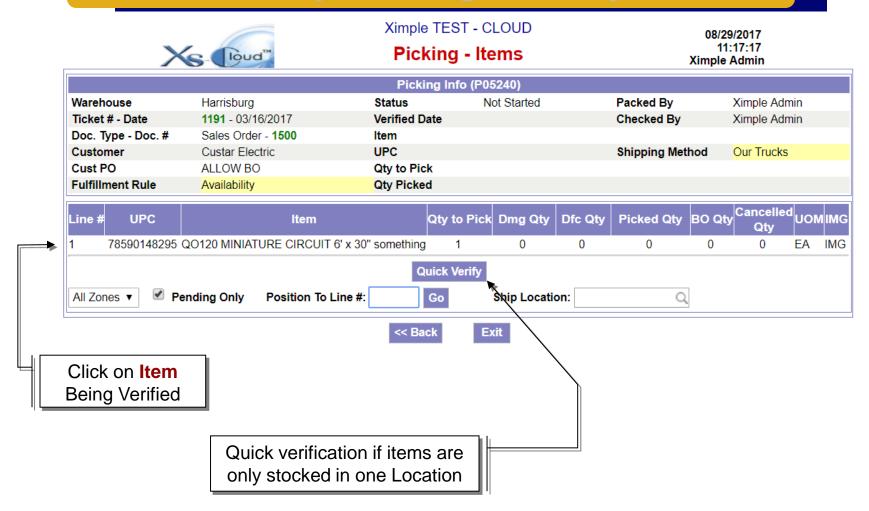
# Verify Picking - Verify







#### **Verify Picking – Verify**







#### <u>Verify Picking – Verify</u>



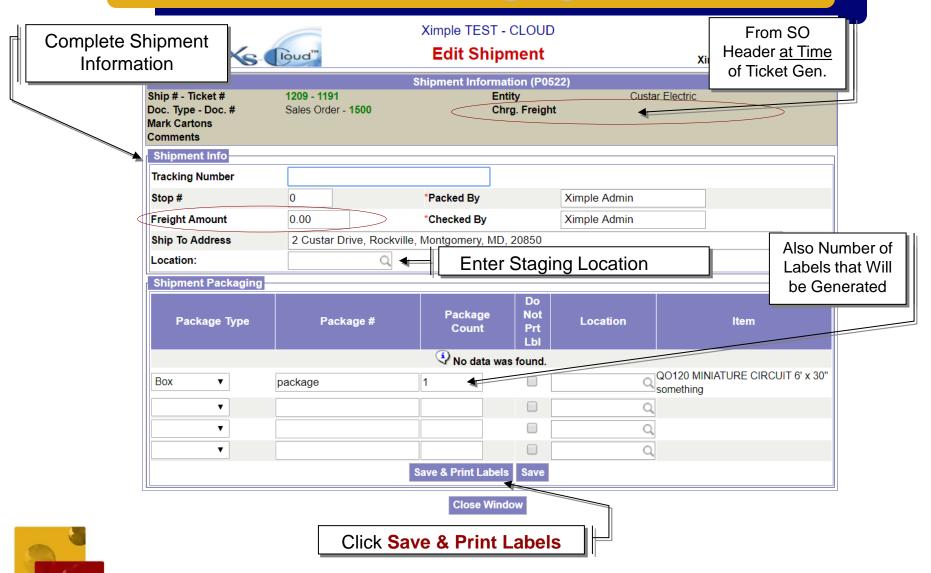
# Verify Picking - Verify & Packaging





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# **Shipping Label**

		Harrisburg
None:	oud™	
Ship To:	-	1 Of 1
Custar Elec	tric	
Rockville, I		
Trip Number: 327 - Route:	- 03/16/2017	
Sales Order Number	1500	)
Packing Slip Number	1209	
Cust PO / Rel. #: A	ALLOW BO /	
Package Numb	ber: package	
Job:		
Allow BO		
Mark Carton:		



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# Picking Certification 3

#### 1. Setup Print Station

- By Zone
- No Zone

#### 2. Generate Pick Tickets

- All Document Types
- By Document Type
- Specific Document

#### 3. Print Pick Ticket

- Print Client
- Generate/Print Ticket Option
- For a Specific Document
- 4. Re-print Pick Ticket
- 5. Re-send Ticket to Printer



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#### **Shipments**

#### **3 Options to Manage Shipments**

- 1. Trips
  - Shipments are being shipped/delivered to:
    - Customer
    - Employee
    - Warehouse
    - Vendor

#### 2. Dispatch

- Shipments are being dispatched at the WH
  - Will Call
- 3. Pending Shipment Register
  - Used to:
    - View all shipments that have been picked
    - Un-enroll & Enroll Shipments (picked) into trips
    - Dispatch Will Call Shipments (picked)





- Automatically generated by the system
- Shipments get automatically enrolled into trips.
   User can manually add or remove shipments from trips
- Trips can be manually created and shipments added manually

#### **Conducting a Trip Consists of:**

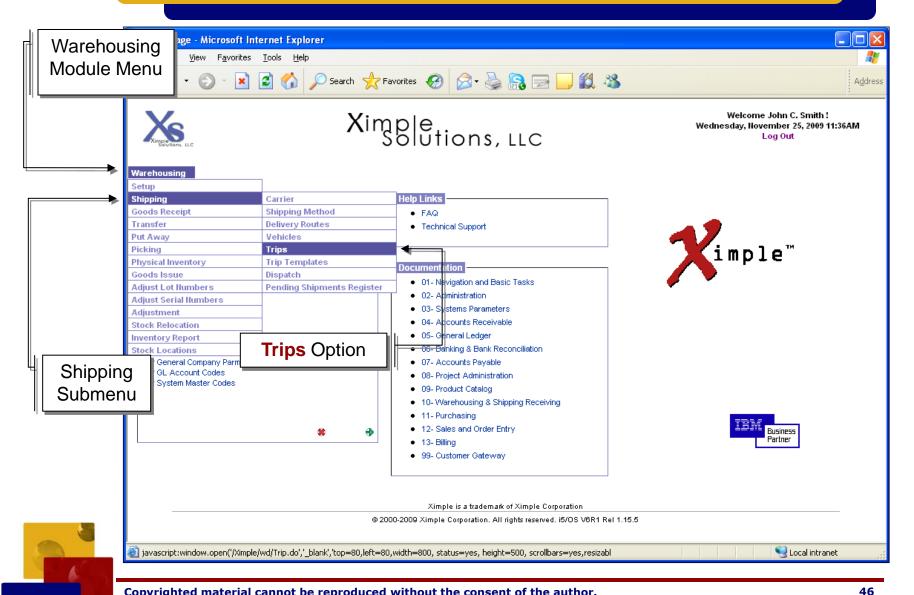
- 1. Edit trip header (Edit)
- 2. Edit Shipments (Shipments)
  - Packaging Information
  - Print labels
- 3. Start Loading (items for all shipments must have been picked)
  - Print Packing Slip
  - Print Shipping Manifest
    - COD Amount is calculated at time Trip status changes to 'Loading'
- 4. Depart
- 5. Confirm/Close
- 6. Deposit COD



45

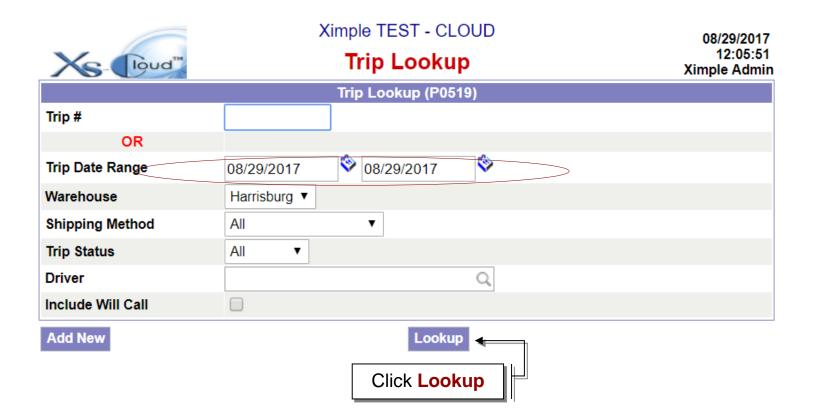


#### <u>Trips</u>





#### <u>Trips – Lookup</u>







#### **Trips Page**



#### Ximple TEST - CLOUD

#### Trips

08/29/2017 12:07:23 Ximple Admin

		Trips (P0365)									
	Trip #	Departure	Warehouse	Shipping Method	Driver	Truck	Route	Wave	Stg Location	Dock Door	Status
	361	View	isburg	Our Trucks							Planned
	362	Shipments	isburg	Our Trucks							Planned
-	/	Start Loading	isburg	Our Trucks							Planned
//	.0();)	Merge Into Delete	risburg	UPS Blue					Shipping Lane 1	Dock 1	Closed
		Cancel Multimedia		Back Re	fresh						

Popup Menu Select **Edit** 

#### **Popup Menu:**

View: View trip information

Edit: Edit trip header

**Shipments:** Edit/Add/Remove shipments in a trip (Enter Packaging Info &

Print Labels)

**Start Loading:** Start loading (changes trip status)

**Merge Into:** Merge ALL shipments from Trip A to Trip B

**Delete:** Delete trip

**Print Manifest:** Generate pdf file of trip manifest

**Print Packing Slip:** Generate pdf files of all packing slips for trip

Cancel: Cancel trip

**Depart:** Change status of trip to show it has departed

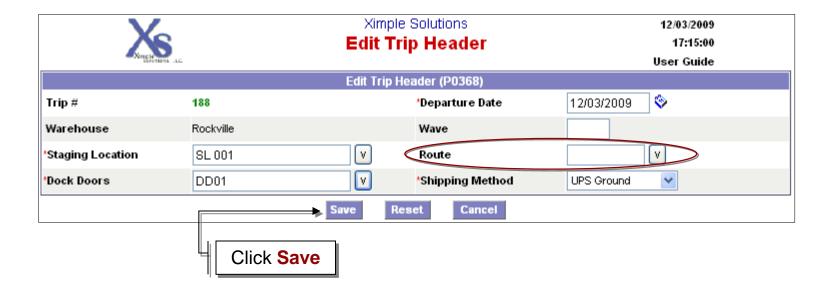
Confirm/Close: Close/Confirm the trip

Multimedia: Add or view Multimedia





## <u>Trips – Edit (Header)</u>

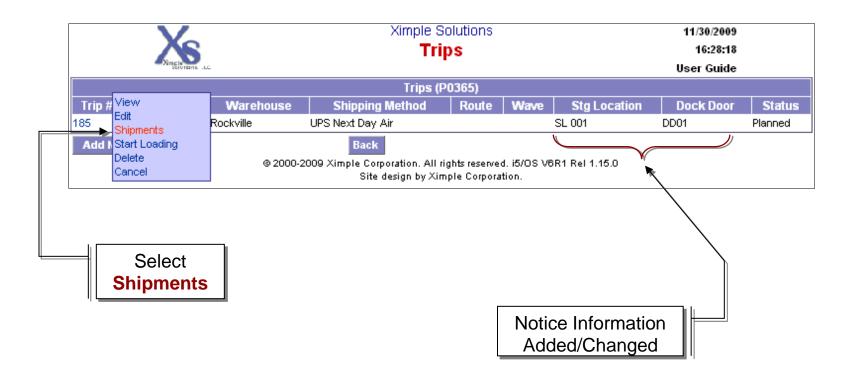


**Note:** Shipping route is only required if the shipping method uses the company's vehicles





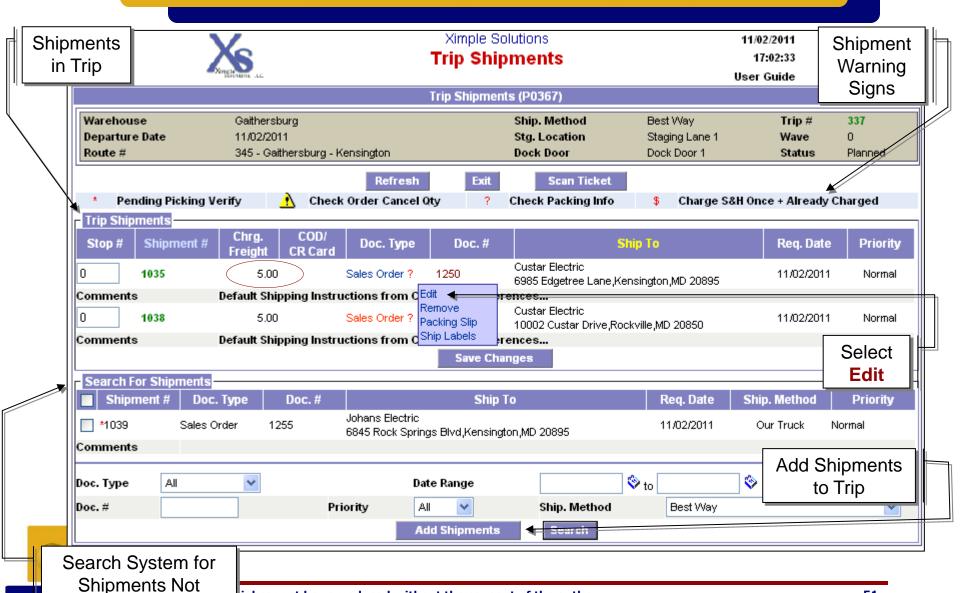
#### **Trips - Shipments (Edit)**







#### <u>Trips – Shipments (Edit)</u>



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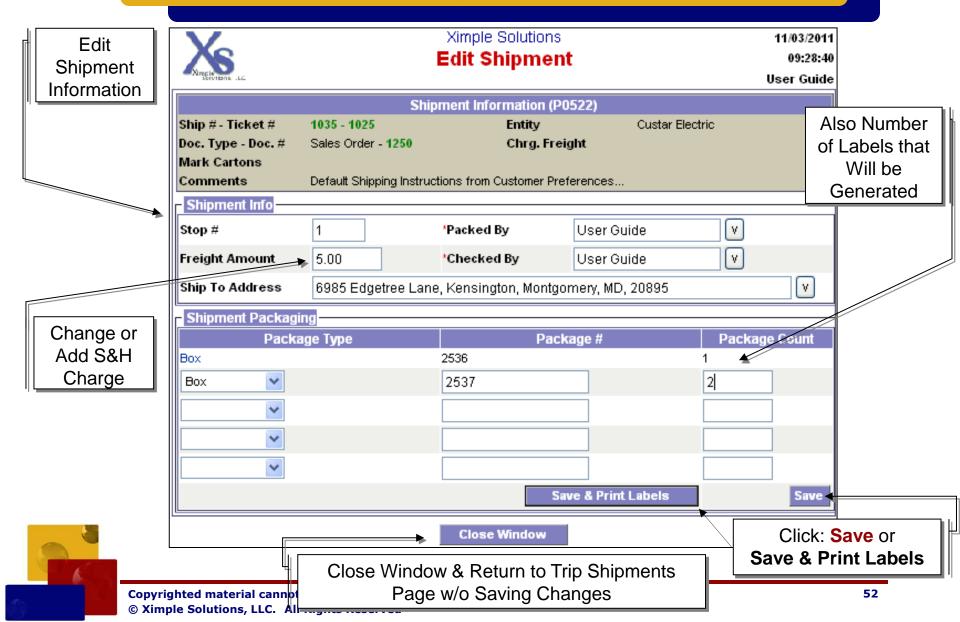
s, LLC. All Rights Reserved

Assigned to a Trip

51

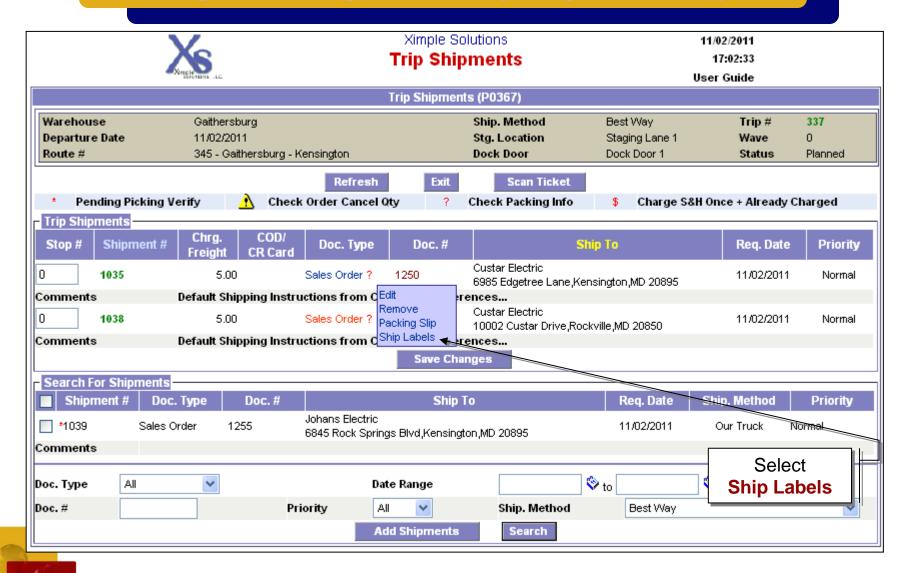


#### <u>Trips – Shipments (Edit)</u>



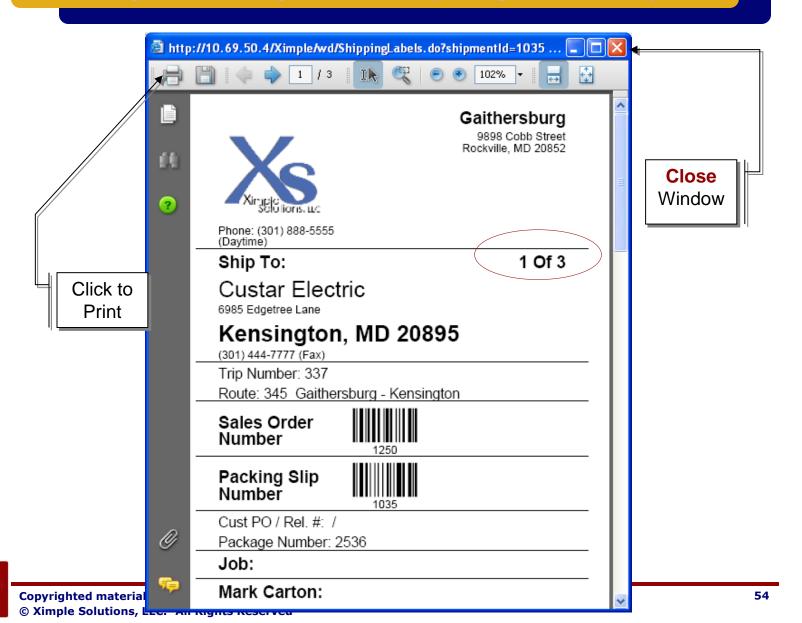


## **Trips - Shipments (Ship Labels)**



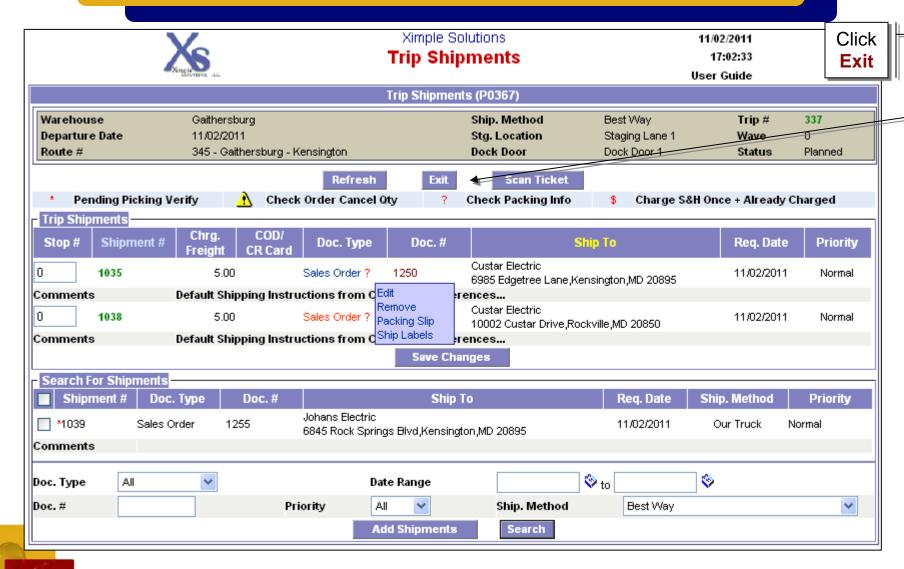


## **Trips - Shipments (Ship Labels)**



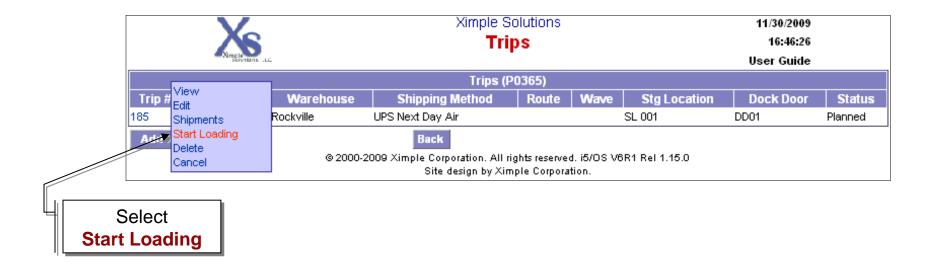


## Trips - Shipments (Edit)





## **Trips – Start Loading**







#### **Trips - Print Packing Slip**

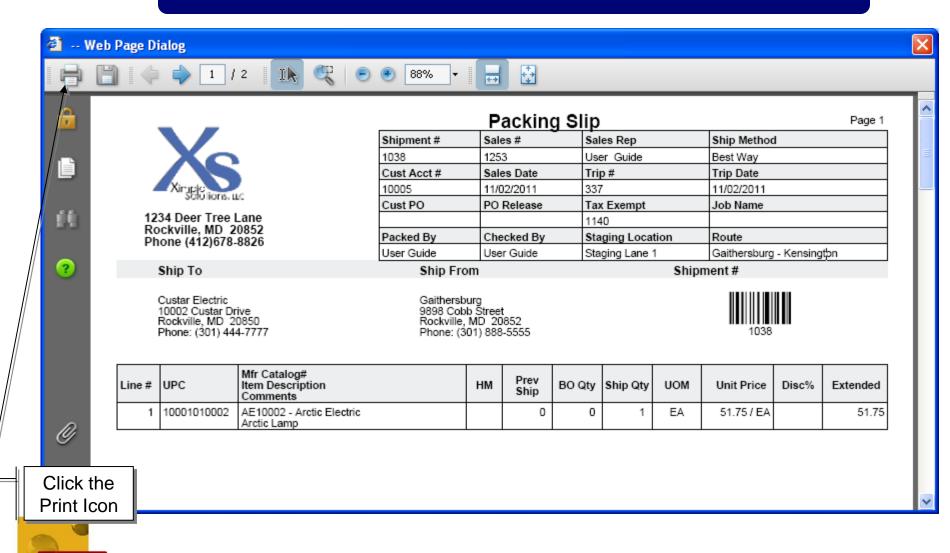


**Note:** Packing Slips can only be printed for Trips whose status has already changed to **Loading**.



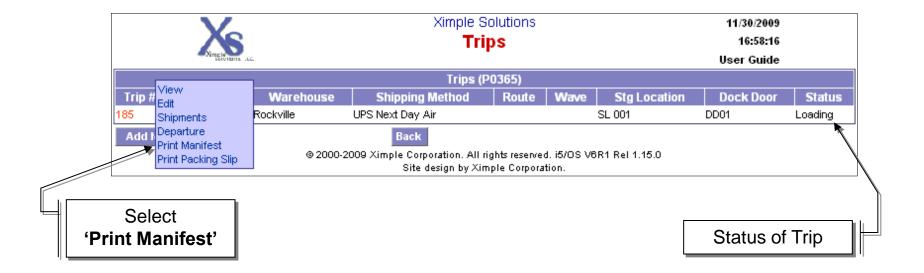


## **Trips - Print Packing Slip**





#### <u>Trips – Print Manifest</u>

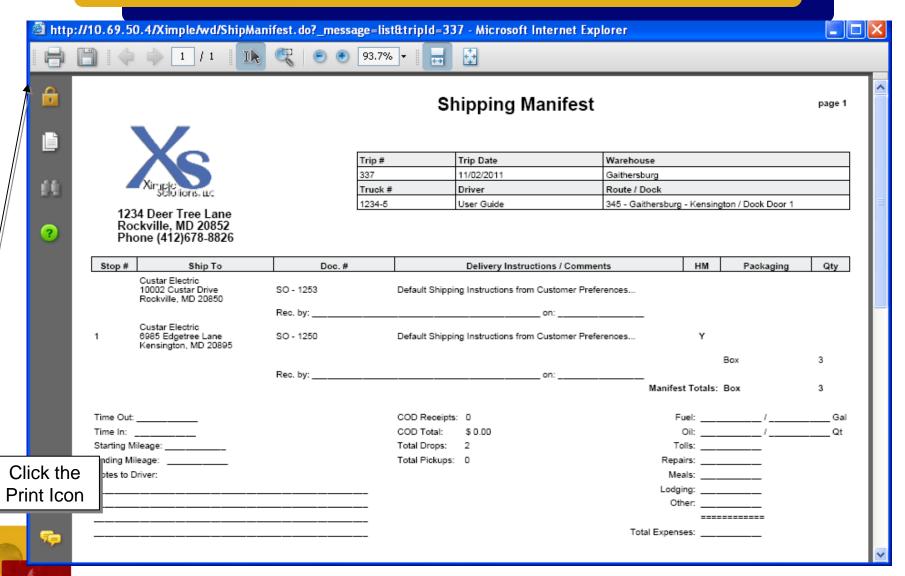


**Note:** Manifests can only be printed for Trips whose status has already changed to **Loading**.



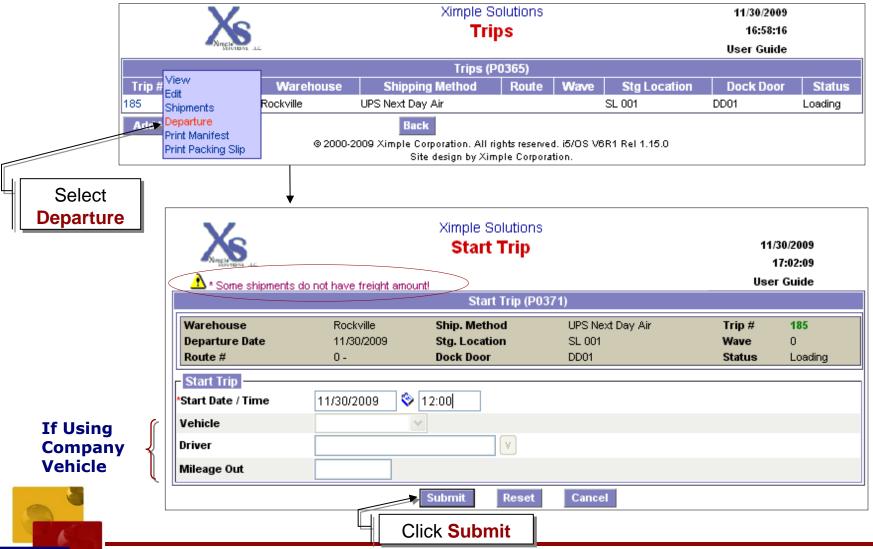


## **Trips - Print Manifest**



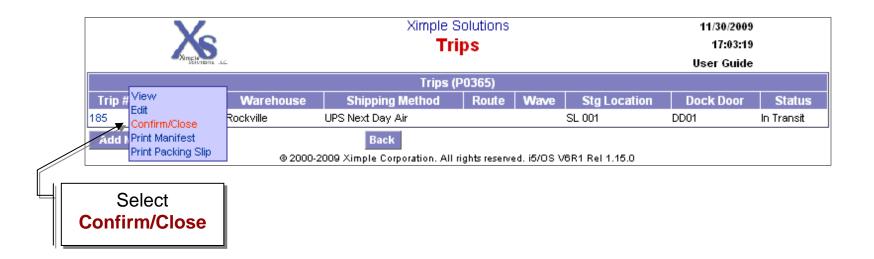


#### <u>Trips – Departure</u>





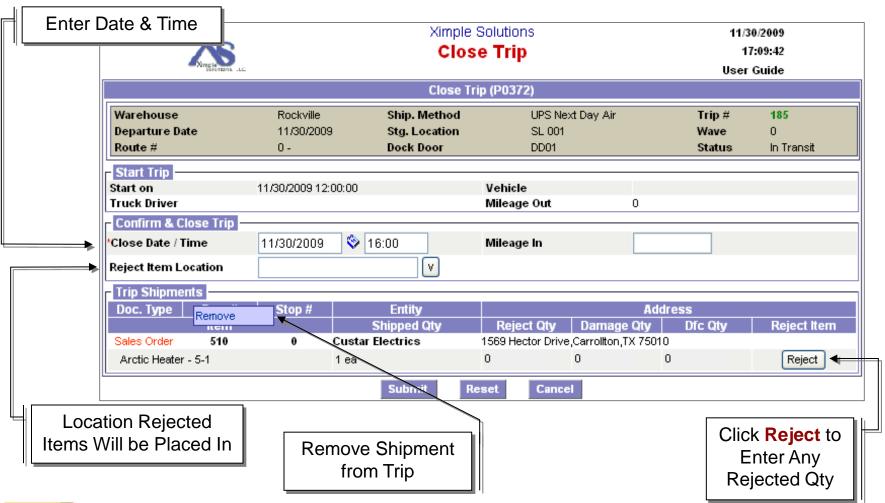
#### Trips - Confirm/Close







#### Trips - Confirm/Close







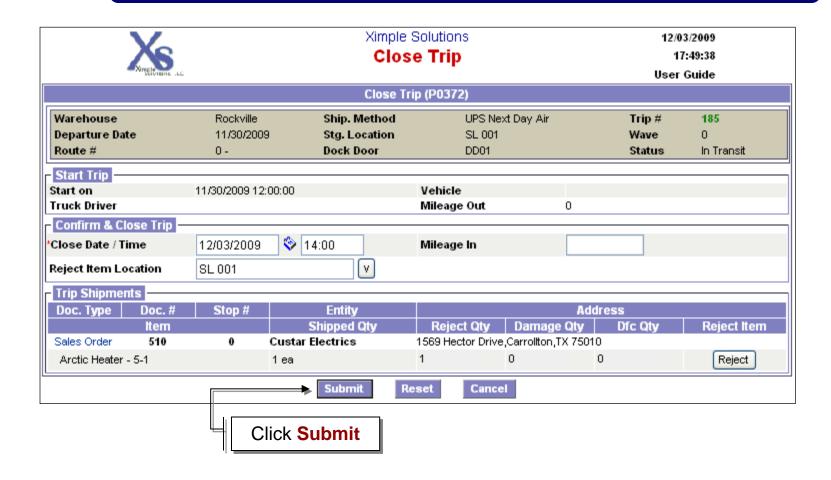
#### Trips - Confirm/Close (Reject Qty)







#### Trips - Confirm/Close

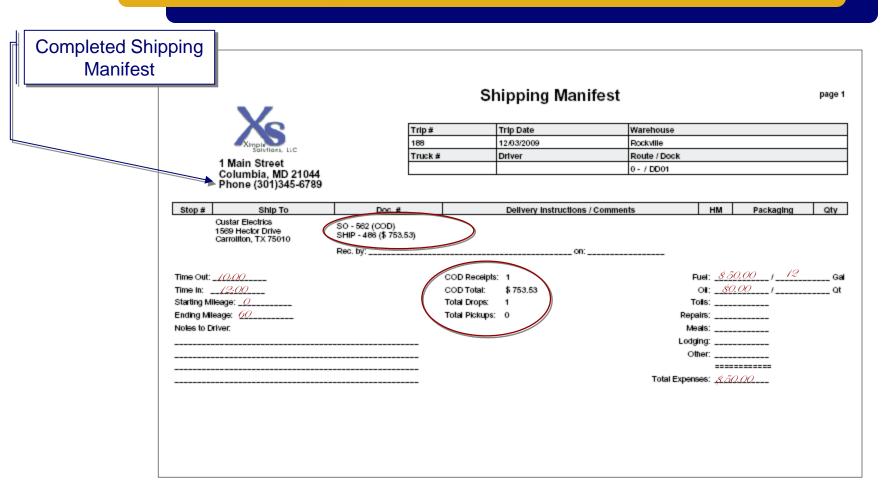




**Note:** Only items received by customer will be invoiced. Briefcase notice will be sent to Sales Person informing them that shipment for their SO has rejected items. SO is put on Hold and must be released prior to any changes being made to it.



## **Trips - COD Received**







#### **Trips - COD Received**

Packing Slip Needs to be Presented to Cashier Along w/ Collected \$\$



1 Main Street Columbia, MD 21044 Phone (301)345-6789

Pac	cking	gilS	

Page 1

		_		
Shipment #	Sales #	Sales Rep	Ship Method	
486	562	User Guide	UPS Ground	
Cust Acct #	Sales Date	Trip #	Trip Date	
150	12/03/2009	188	12/03/2009	
Cust PO	PO Release	Tax Exempt	Job Name	
Packed By	Checked By	Staging Location	Route	
		SL 001		

Ship To

Custar Electrics 1569 Hector Drive Carrollton, TX 75010 Phone: (301) 929-5728 Ship From

Rockville 4568 Oak Street NW Rockville, MD 20852 Shipment #



Line #	UPC	Mfr Catalog# Item Description Comments	нм	Prev Ship	BO Qty	Ship Qty	иом	Unit Price	Disc%	Extended
1	10001050001	AE50001 - Arctic Electric, Inc. 5-1		0	0	1	ea	527.28/ea		527.28
2	10001010001	(NOT RETURNABLE) AE10001 - Arctic Electric, Inc. Arctic Lamp - Large Ficor Self Memo Catalog		0	0	3	ea	74.75/ea		224.25

 Sub Total
 751.53

 Shipping & Handling
 2.00

 Total
 753.53
 US Dollar

 COD Amount
 753.53
 US Dollar





# **Manually Create New Trip**

	Ximple Solutions	11/30/2009
<b>76</b>	Trip Lookup	16:15:15
Ningle LC		User Guide
	Trip Lookup (P0519)	
Trip#		
OR		
Trip Date Range	11/30/2009	
Warehouse	Rockville	
Shipping Method	All	
Trip Status	All 💌	
Add New	Lookup	
Click		
Add New		





#### Manually Create New Trip (Header)

Complete Header

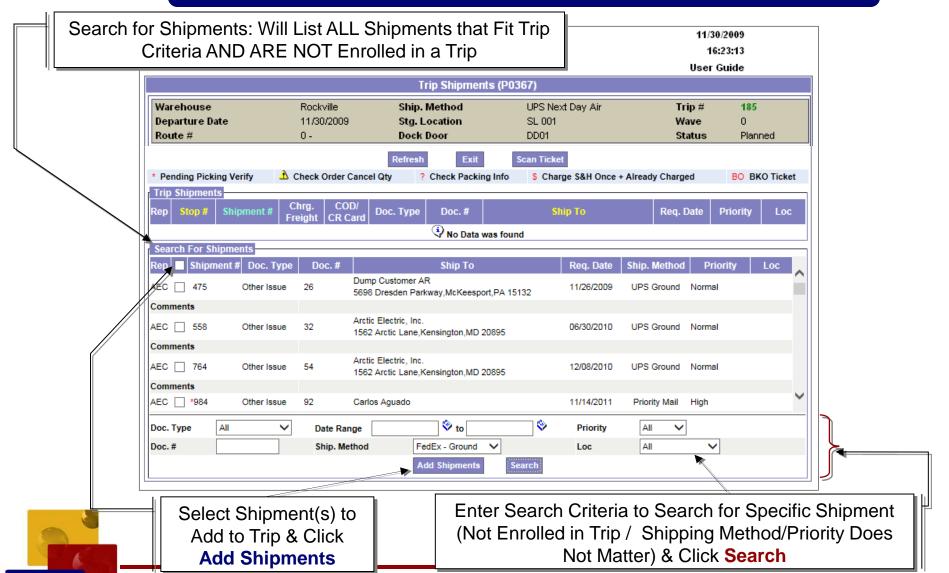






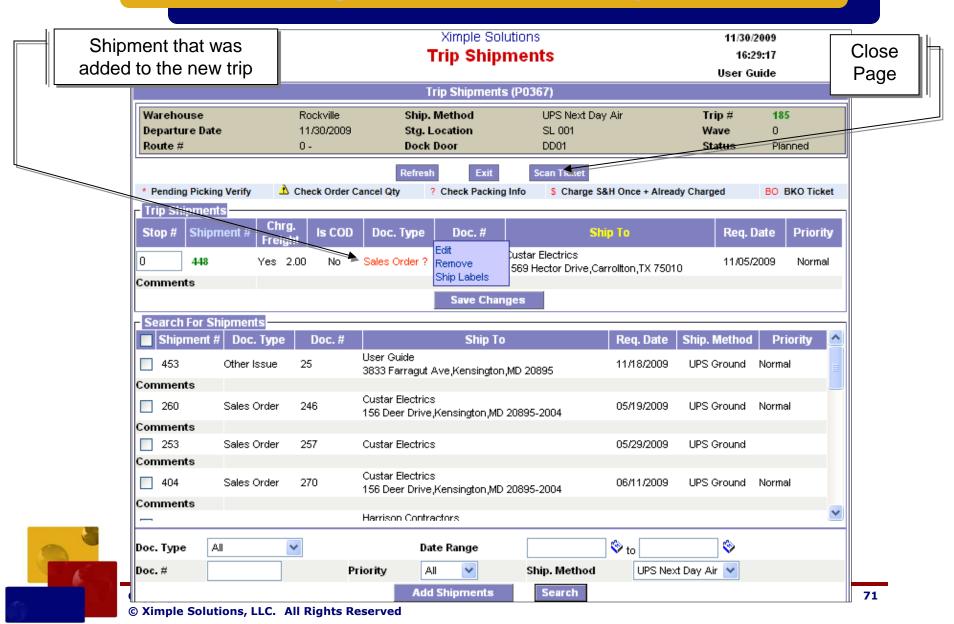


#### Manually Create New Trip (Shipments)





#### Manually Create New Trip (Shipments)



# imple'

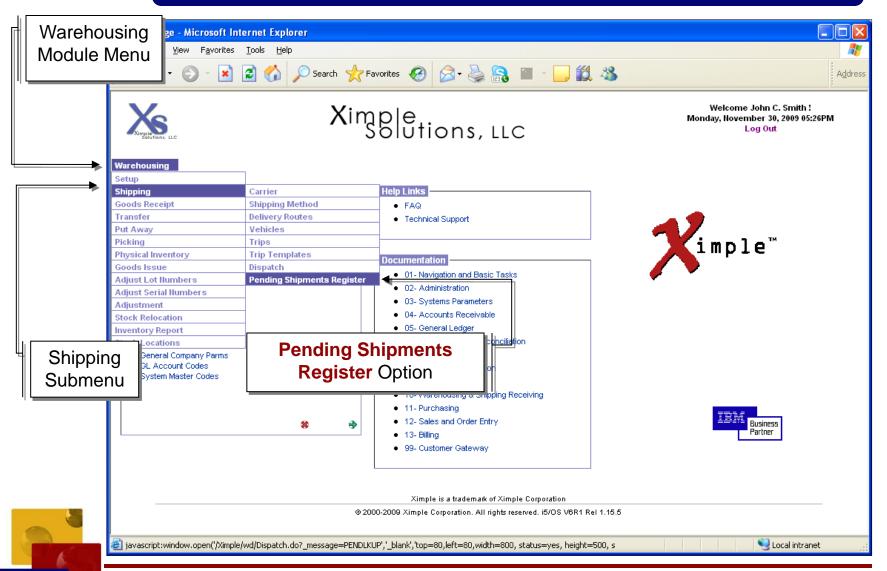
# **Trips Certification** 4

- 1. Manually Enter a Trip
- 2. Edit Shipments
  - Stop Numbers, Packaging information
  - Change S & H
  - Change Ship to Address
  - Print Labels
  - Add & Remove Shipments
- 3. Print Manifest & Packing Slips
- 4. Depart Trip
- 5. Close Trips
  - Reject Items
  - Remove Shipments



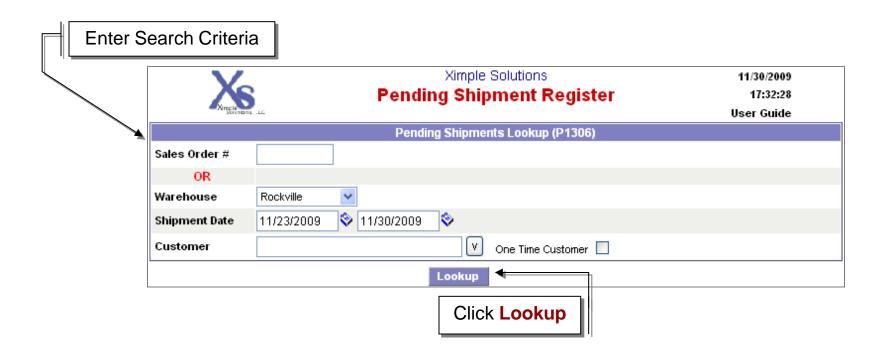


### **Pending Shipments Register**





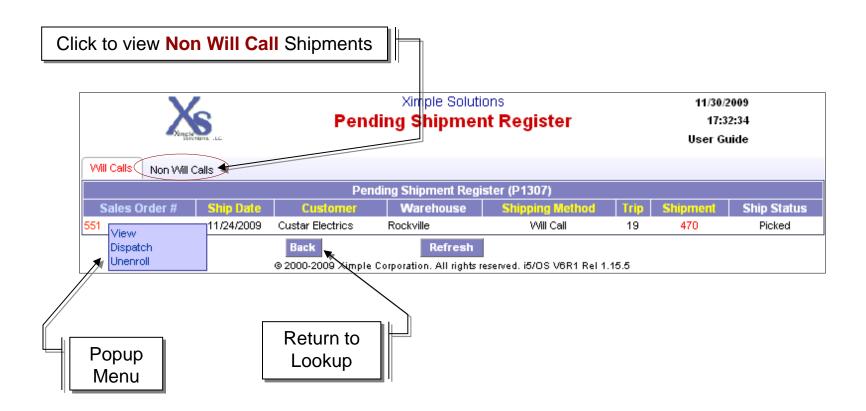
### **Pending Shipments Register**







### **Pending Shipments Register**





### Pending Shipments Register (un-enroll)





imple™



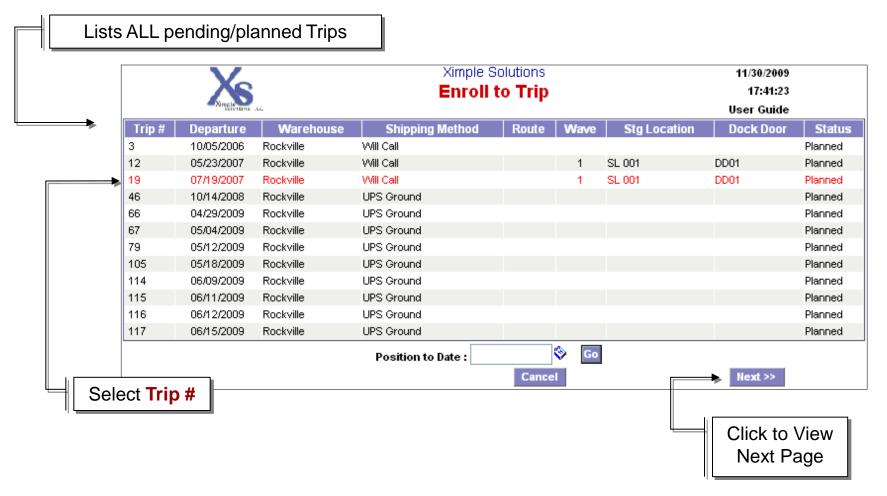






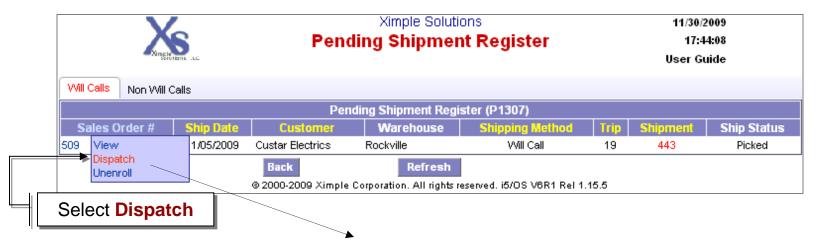








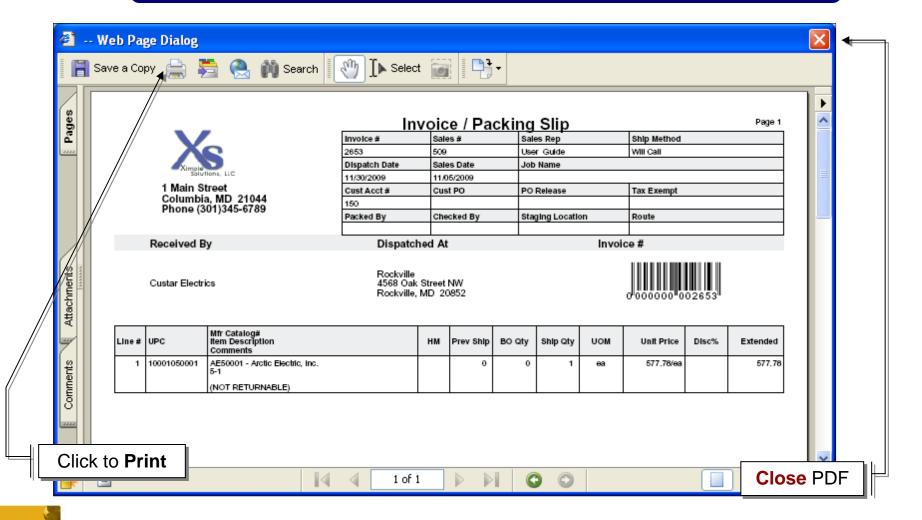
### Pending Shipments Register (Dispatch)





imple™

### Pending Shipments Register (Dispatch)



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#### 1. Dispatch Shipment

- Using Dispatch Option
- Using Pending Shipments Register

#### 2. Lookup Shipments

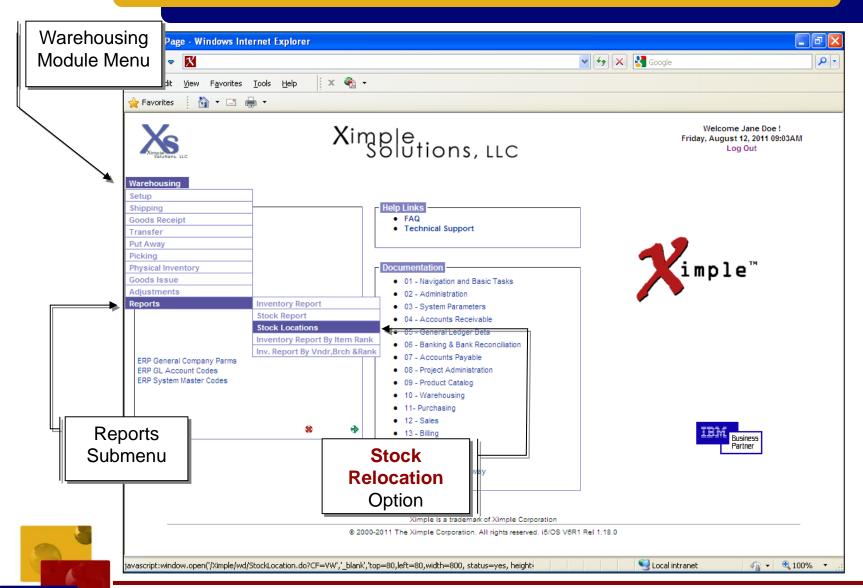
- From Dispatch Lookup
- From Pending Shipments Lookup

#### 3. Un-enroll & Enroll Shipments



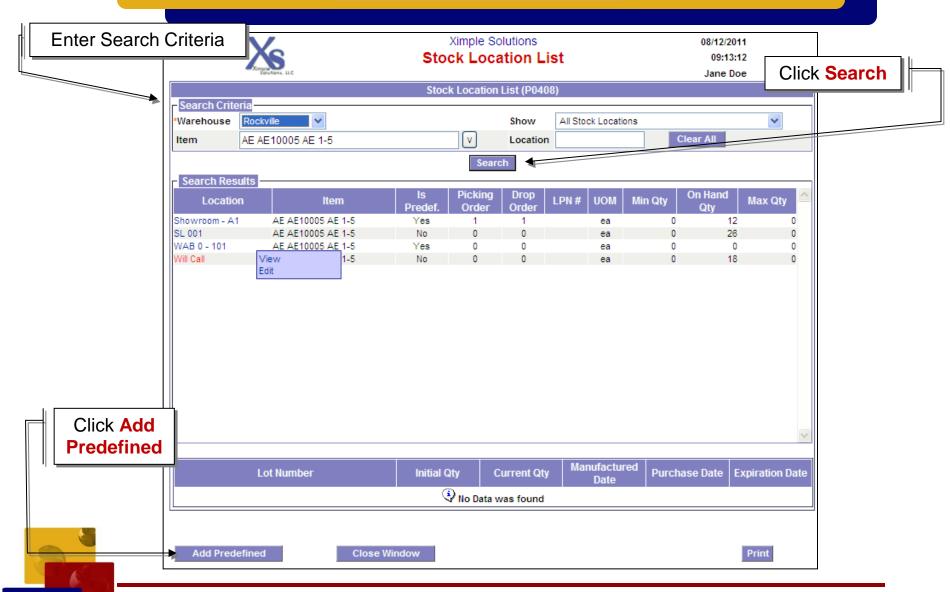


### **Stock Locations**





### **Stock Locations**





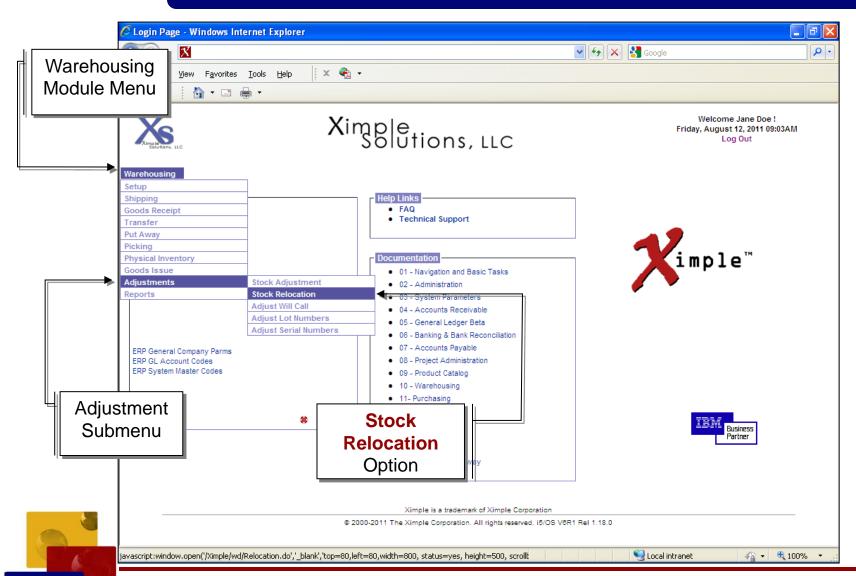
# **Stock Locations – Add Predefined**

V	Ximp	12/16/2009	
<b>AS</b>	New St	13:38:45	
Anicie Solvibria .LC		User Guide	
	New Stock	Location (P0409)	
Warehouse/Store	Rockville		
*Location	Showroom - A1		
*Stock Item	AE10001 Arctic Lamp 1-1 AE	٧	
Container	V	Is Predefined	
Picking Order	1	Min. Qty.	1
Drop Order	1	Max. Qty.	3
	Save	Reset Cancel	
	Click Save		



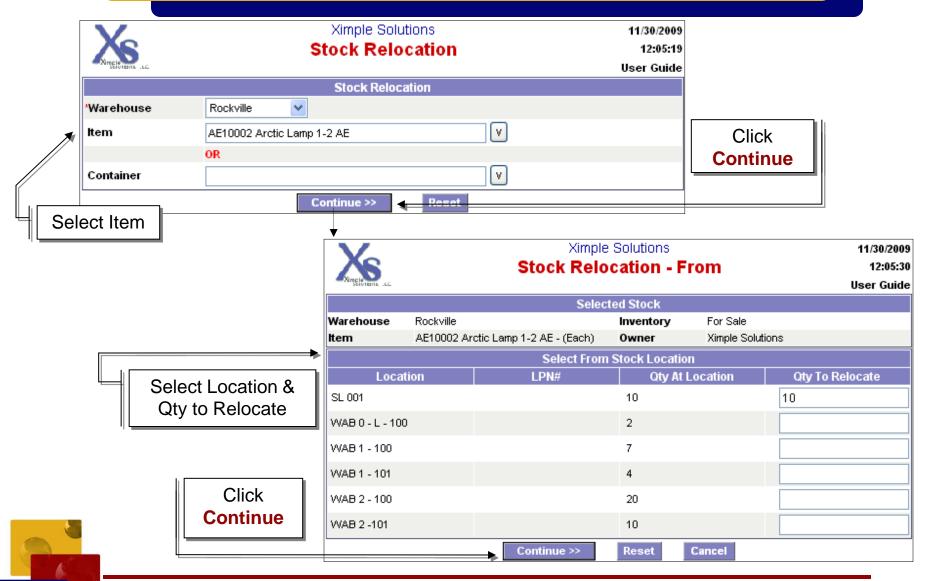


### **Stock Relocation**



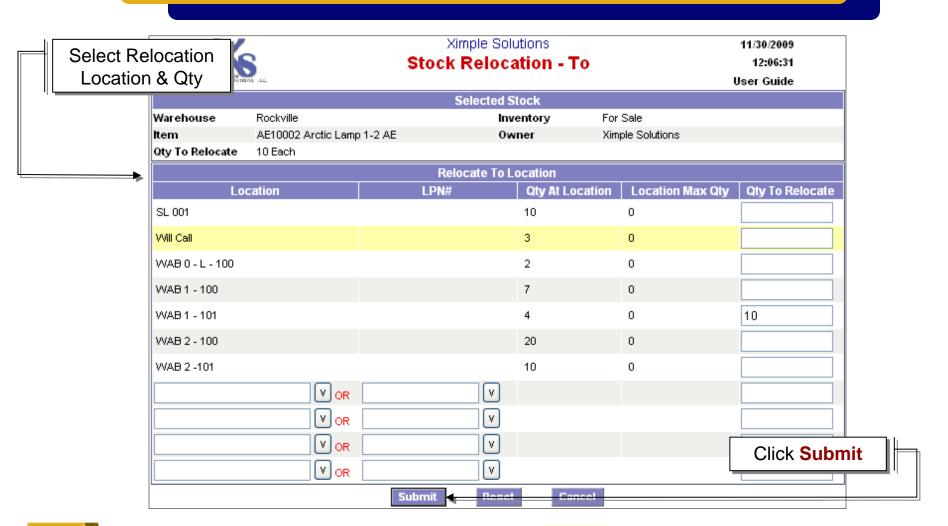


### **Stock Relocation**





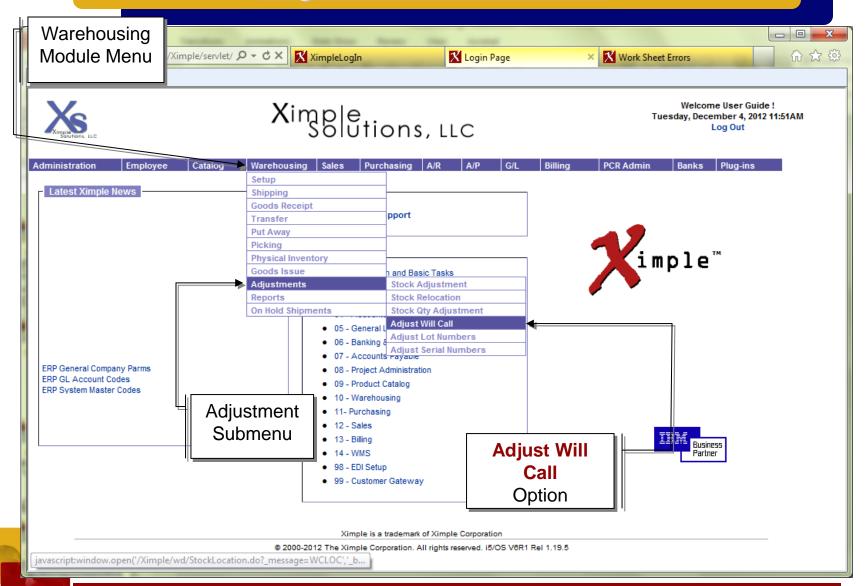
### **Stock Relocation**



\*Note: Will Call locations will be displayed in Yellow



### **Adjust WC Location**





# **Adjust Will Call Location**

	V		Ximple S	Solu	tions				07/19/2010	
Will Call Stock Location List						List	12:21:36			
Ningh and LC							U	ser Guide		
	Stock Location List (P0408)									
Search Criteria										
			••							
*Warehouse	Rockville	~	Item					V		
			Sea	rch						
Canada Da	- Mari									
Search Re	Suits	Marine		34.	Ham	E JA	les es est e es e		0	
Location	0.0540000 0 H L	Item				Edit		Vissala Calatina	Owner	
Will Call	ACE10002 Apelton Lamp				ea		For Sale	Ximple Solutions		
Will Call	ACE10003 Apelton Lamp				ea		For Sale	Ximple Solutions		
Will Call	AE10001 AE AE10001 - F	Product Level AE			ea		For Sale	Ximple Solutions		
VVIII Call	AE10002 Arctic 1-2 AE	_		-	ea		For Sale	Ximple Solutions		
VVIII Call	AE10003 AE AE10003 AE				ea		For Sale	Ximple Solutions		
VVIII Call	AE10005 AE AE10005 AE			_	ea		For Sale	Ximple Solutions		
VVIII Call	AE10009 Arctic Lamp 1-9				ea		For Sale	Ximple Solutions		
Will Call	AE50001 Arctic Heater -			13			For Sale	Ximple Solutions		
Will Call	EA10001 Ertime Lamp 1-1						For Sale	Ximple Solutions		
Will Call	ACE10002 Apelton Lamp	1-2		5	ea	Edit	For Sale	Rigel Electrical Co	orporation 01	
Add New	4_	Class	Window							
Add New	1	Close	Window							
		C	Click Add N	<b>Vev</b>	N II	H				





# **Adjust Will Call Location**

Ningle Services .cc	Ximple Solutions Add Will Call Stock Location	07/19/2010 12:47:14 User Guide	
	Add Will Call Stock Location		
*Warehouse	Rockville		
*Item	AE10009 Arctic Lamp 1-9 AE		
<b>'Qt</b> y	1		
	Save Cancel	,	
	Click Save		





# **Stock Relocation Certification**<sup>6</sup>

#### 1. Relocate Item

- Relocate to a Location item is already stored in
- Relocate to a new Location item is not stored in
- Adjust Will Call location





### **END Warehousing Overview**

