



Kensium WMS Configuration

To accomplish this allocation by UOM, KensiumWMS introduces two elements:

- **Primary Pick Zone (PPZ)** consists of one or more Acumatica warehouse locations and is used to restrict allocations by UOM.
- **Stock UOM** is the unit of measure in which the item is typically handled in the warehouse. If no Stock UOM is defined then Kensium Optimization is not imposed on the SO line item and the Acumatica base UOM is used for allocations.

Depending on the configuration KensiumWMS will either restrict all optimized picks to the PPZ or will assume picks in the Stock UOM to be outside the PPZ and all other UOMS from within the PPZ. After installing the KensiumWMS Optimization Customization Package, there are two options available under Pick Optimization Settings.

1. Configuring the Primary Pick Zone:
 - a. Set up the Acumatica Location KensiumWMS will use to identify locations in the PPZ.



FR Warehouses Preferences

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* Warehouse ID: 🔍

LOCATION CROSSDOCK X LOCATION ZONE

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			* Zone ID	Description	Primary Pick Zone
			1FL	First Floor	<input type="checkbox"/>
			2FL	SECOND Floor	<input type="checkbox"/>
			6-G	6-G	<input type="checkbox"/>
			ABC123	ABC123	<input type="checkbox"/>
			BULK	Bulk Storage	<input type="checkbox"/>
			CDPROD1	Cross dock for Production Cente...	<input type="checkbox"/>
			CDREC	Cross-Dock for Receiving	<input type="checkbox"/>
			PICK	Each Pick	<input type="checkbox"/>
			PPZ	Primary Pick Zone	<input checked="" type="checkbox"/>
>			TESTCD	atest	<input type="checkbox"/>

b. Assign Acumatica locations to be included in the PPZ.

FR Warehouses Preferences



Warehouse ID:

[LOCATION](#) [CROSSDOCK X LOCATION](#) [ZONE](#)

Location

* Location ID	Description	Cross Dock	Zone
R1S3	Row 1 Shelf 3	<input type="checkbox"/>	
R2S1	Row 2, Shelf 1	<input type="checkbox"/>	PPZ
R2S2	Row 2, Shelf 2	<input type="checkbox"/>	
R2S3	Row 2, Shelf 3	<input type="checkbox"/>	
R3S1	Row3, shelf 1	<input type="checkbox"/>	PPZ
REC1	Receiving 1	<input type="checkbox"/>	
REC2	Receiving 2	<input type="checkbox"/>	
RECEIVING	Receiving	<input type="checkbox"/>	
SHIP	Shipping	<input type="checkbox"/>	
SORT1	Sort Station 1	<input type="checkbox"/>	
SORT2	Sort Station 2	<input type="checkbox"/>	
STORAGE		<input type="checkbox"/>	
TESTCD	Test Cross Dock	<input type="checkbox"/>	TESTCD
THISISAVERYLONGLOCATIONID	crossdock	<input checked="" type="checkbox"/>	

- Identify the Stock UOM. Taken from the Item Cross Reference tab, this is the UOM in which this item is normally carried in the warehouse. Note if no Kensium Stock UOM is defined then Optimization will not be imposed on this item and conventional Acumatica allocations will be used.

Stock Items

CONBABY3 - Grac Pack N Play with Newborn Napperstation



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* Inventory ID:	CONBABY3 - Grac Pack N Play with N	Product Workgroup:	
Item Status:	Active	Product Manager:	
Description:	Grac Pack N Play with Newborn Napperstation		
UPC:	CONBABY3		

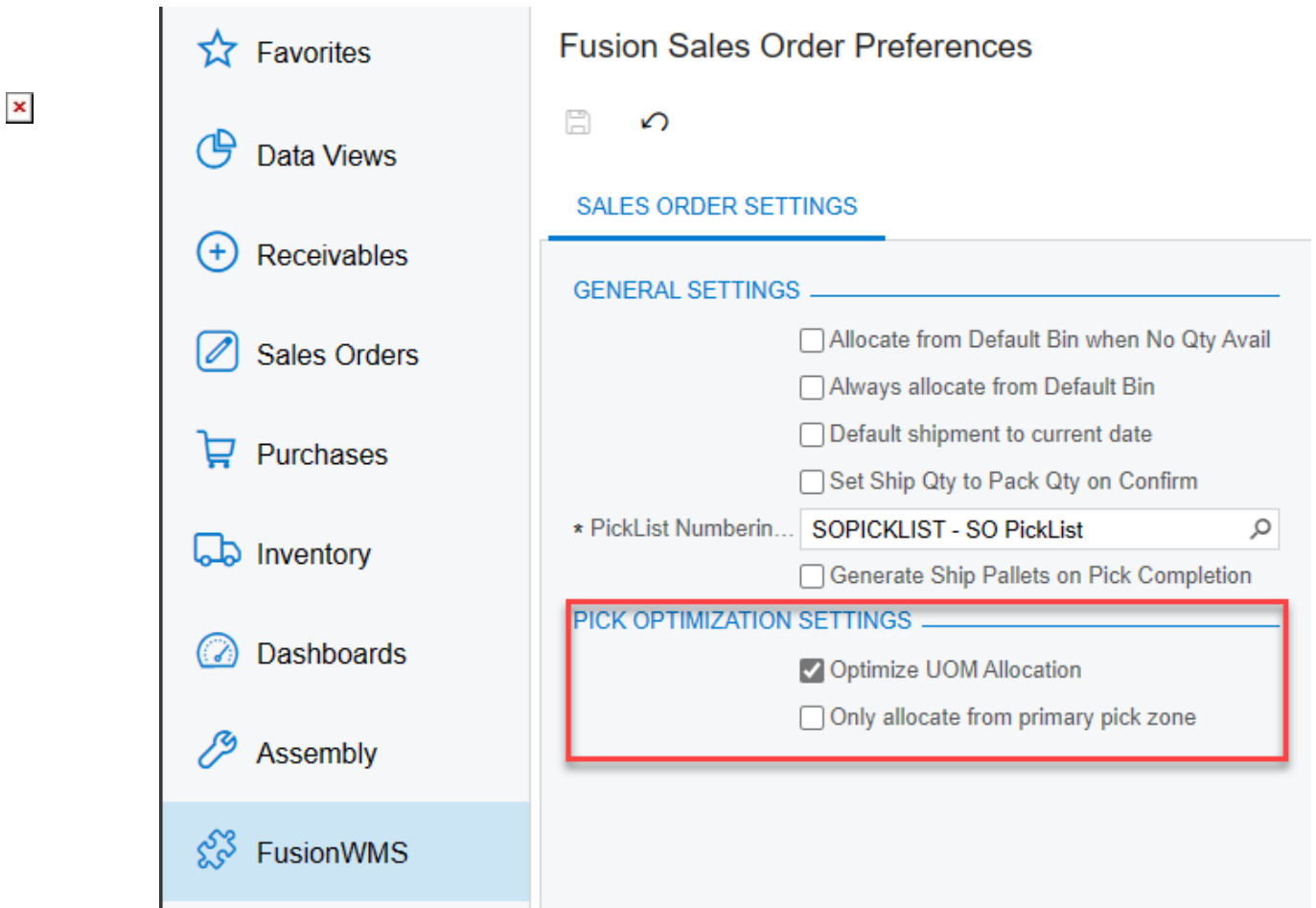
GENERAL | PRICE/COST | MANUFACTURING | WAREHOUSES | VENDORS | ATTRIBUTES | PACKAGING | CROSS-REFER

Template ID:		UNIT OF MEASURE																	
ITEM DEFAULTS		Base Unit:	EA	<input type="checkbox"/> Divisible Unit															
* Item Class:	CONSUMER -100-BABY - Baby Prod	* Sales Unit:	EA	<input type="checkbox"/> Divisible Unit															
Type:	Finished Good	* Purchase Unit:	BOX20	<input type="checkbox"/> Divisible Unit															
	<input type="checkbox"/> Is a Kit	Fusion Stock Unit:	BOX20	<input type="checkbox"/> Weight Item															
Valuation Method:	Average	<table border="1"> <thead> <tr> <th>* From Unit</th> <th>Multiply/I</th> <th>Conversion Factor</th> <th>To Unit</th> <th>Barcode</th> </tr> </thead> <tbody> <tr> <td>> BOX10</td> <td>Multiply</td> <td>10.000000</td> <td>EA</td> <td></td> </tr> <tr> <td>BOX20</td> <td>Multiply</td> <td>20.000000</td> <td>EA</td> <td></td> </tr> </tbody> </table>			* From Unit	Multiply/I	Conversion Factor	To Unit	Barcode	> BOX10	Multiply	10.000000	EA		BOX20	Multiply	20.000000	EA	
* From Unit	Multiply/I	Conversion Factor	To Unit	Barcode															
> BOX10	Multiply	10.000000	EA																
BOX20	Multiply	20.000000	EA																
* Tax Category:	TAXABLE - Taxable Goods and Servic																		
* Posting Class:	CON - Consumer Goods																		
* Lot/Serial Class:	NOTTRACKED - Not Tracked																		
Auto-Incremental Value:																			
Country Of Origin:																			

WAREHOUSE DEFAULTS

3. Determine Optimization methodology

- a. There are two ways to impose optimization. The first, and most common approach is to restrict picks in any UOM other than the Stock UOM to the PPZ. This eliminates the potential for open cases to remain on shelves with full cases.



Fusion Sales Order Preferences

SALES ORDER SETTINGS

GENERAL SETTINGS

- Allocate from Default Bin when No Qty Avail
- Always allocate from Default Bin
- Default shipment to current date
- Set Ship Qty to Pack Qty on Confirm
- * PickList Numberin... SOPICKLIST - SO PickList
- Generate Ship Pallets on Pick Completion

PICK OPTIMIZATION SETTINGS

- Optimize UOM Allocation
- Only allocate from primary pick zone

In the aforementioned case of the SO line quantity of 100 with a case of 24 as the Stock UOM this would result in a pick list with four individual items from the PPZ and four cases from a location outside the PPZ.

- A second approach restricts all picks to the PPZ. This approach could be used where all items are to be picked from the grade-level locations.



Fusion Sales Order Preferences



SALES ORDER SETTINGS

GENERAL SETTINGS

Allocate from Default Bin when No Qty Avail

Always allocate from Default Bin

Default shipment to current date

Set Ship Qty to Pack Qty on Confirm

* PickList Numberin...

Generate Ship Pallets on Pick Completion

PICK OPTIMIZATION SETTINGS

Optimize UOM Allocation

Only allocate from primary pick zone

4. Restock / Down Stock

Essential to pick optimization and manage inventory levels before shipments are created to make sure sufficient quantities are in the PPZ when shipments are created. To do that the first step in the Optimization process is to identify which Sales Orders, if shipments were to be created, would ship complete given current inventory levels. To accomplish this, after loading the Create Shipment Action select Optimize Shipments.

Process Orders CUSTOMIZA

↻ ↶ PROCESS PROCESS ALL ↻ DOWN STOCK OPTIMIZE SHIPMENTS ⏪ ⏩ 🔍 ⏴

Action: Create Shipment ⌵ Customer: ⌵ Primary Pick Zone Only
 Select By: Ship Date ⌵ Carrier: ⌵
 Start Date: ⌵ Ship Via: ⌵
 * Shipment Date: 10/25/2023 ⌵ Warehouse: ⌵
 * End Date: 10/25/2023 ⌵

ALL RECORDS REQUESTED THIS MONTH

Order Type	Customer Name	Order Nbr.	Ship Via	Ordered Qty.	Order Weight	Sched. Shipment	Shipping Zone	Order Total	Ship Via Description	Requested On
SO	USA Bartending School	SO006717		3.00	57.300000	5/2/2023		1,809.85		5/2/2023
SO	ABC Studios Inc	SO006633		1.00	19.100000	5/3/2023		599.95		5/3/2023
SO	ABC Holdings Inc	SO006718		7.00	133.700000	5/3/2023		4,199.65		5/3/2023
TR	Products Retail	SO006728		5.00	4.000000	5/5/2023		0.00		5/5/2023
SO	ABC Holdings Inc	SO006719		10.00	0.000000	5/8/2023		0.00		5/8/2023
SO	ABC Holdings Inc	SO006732		130.00	8,939.200000	5/11/2023		46,435.40		5/11/2023
SO	ABC Studios Inc	SO006722		10.00	191.000000	5/25/2023		5,999.50		5/25/2023
SO	ABC Studios Inc	SO006748		225.00	607.500000	7/5/2023		12,918.00		7/5/2023
SO	USA Bartending School	SO006749		10.00	58.900000	8/22/2023		5,736.41		8/22/2023
SO	Alfa Ace	SO006759		35.00	4,020.450000	9/20/2023		6,198.50		9/20/2023

Sales Orders / Process Orders / Optimize Sales Orders

Optimize Sales Orders displays Sales Orders in color format reflecting the following:

- Green. These are Sales Orders that would ship complete with current inventory levels* if shipments were created.
- Yellow. These are sales Orders that could ship complete given current inventory levels, * however some of the required inventory would be allocated to other shipments given the current priorities. The operator may want to reprioritize sales orders to reallocate the inventory.
- Red. These are Sales Orders that cannot ship complete because one or more items are out of stock.

*Note the proposed inventory allocations used in the Optimize Sales Orders include all available inventory anywhere in the warehouse or only in the PPZ if the Primary Pick Zone Only check box is selected.

Once the desired Sales Orders are selected (before Process) selecting Down Stock will tell which items and in what quantities need to be transferred to the Primary Pick Zone to have enough to meet demand when shipments are created.



Process Orders

PROCESS PROCESS ALL DOWN STOCK OPTIMIZE SHIPMENTS

Action: Create Shipment
Select By: Ship Date
Start Date: 10/25/2023
Shipment Date: 10/25/2023
End Date: 10/25/2023

Customer: [Search]
Carrier: [Search]
Ship V: [Search]
Wareh: [Search]

Primary Pick Zone Only

ALL RECORDS REQUESTED THIS MONTH

Order Type	Customer Name	Order
SO	ABC Studios Inc	SO
SO	USA Bartending School	SO
SO	Asahi Sun Tours	SO
SO	Antun's of Westchester	SO
SO	USA Bartending School	SO
SO	Alphabelland School Center	SO
SO	ABC Holdings Inc	SO
SO	ABC Studios Inc	SO
SO	Jevy Computers	SO
SO	Active Staffing Service	SO
SO	USA Bartending School	SO
SO	Bestype Image	SO
SO	ABC Capital Ventures	SO

Down Stock

Destination Warehouse	Destination Zone	Inventory Item	Quantity	UOM
WHOLESALE	PPZ	CONBABY2	2.00	BOX10
WHOLESALE	PPZ	CONBABY3	2.00	BOX20
WHOLESALE	PPZ	CONBABY1	1.00	BOX20

OK

135.00 1,904.050000 7/6/2022 05C 35,573.10 7/6/2022

Sales Orders / Process Orders / Down Stock