

# Pick, Pack & Ship

## Acumatica Configuration:

### Warehouse:

- **Pallet Stock Location.** Set up PStock or PalletStock as an Active location in the warehouse to be included in the quantity available, with sales, receipts, transfers and assembly allowed. Set the Pick Priority to a relatively high number so other locations are allocated before Pallet Stock.
- **Pallet Ship Location.** Set up PShip or PalletShip as an Active location in the warehouse to be included in the quantity available, with sales, receipts, transfers, and assembly allowed. Set the Pick Priority to 999. This location is used to store pallet IDs and contents for shipments in process or completed.
- **Pick Sequence.** The Kensium WMS Pick Sequence overrides the Acumatica routing and allows for optimum pick flow. When used in tandem with Zones (Note: More recent versions of Acumatica allow the operator to define a "Path" which is redundant with Kensium WMS Pick Sequence.)
- **Zone.** If Zones are used, the user may also select the zone in which they are operating. Examples of a Zone would be an external yard, freezer, bulk storage, etc. If zones are used, KensiumWMS will split a single pick list by zone so that the user will only see picks within their zone. When their pick is complete, they can declare or view the staging area where the other picked items on the shipment are located.
- To use zones first go to the zone tab in the warehouse setup and add Zone IDs with their respective descriptions. Then put the zone adjacent to the Acumatica Location ID. When using zones, the Pick Sequence will now define the route within the zone as well as in the warehouse. From the handheld the operator may select one or all zones.

### Sales Order

- **Sales Order Preferences - Boxes.** Kensium WMS allows the operator to scan or enter the box to be packed. To limit the number of boxes visible to the handheld, Kensium WMS will only recognize those with a KensiumID. This may be a barcode which can be scanned. Also, there is the ability to provide a Default Box type. This will be the default Container presented on the handheld which may be overridden as necessary.

## Basic Methods:

**KensiumWMS Advanced provides two basic methods in the pick / pack process.**

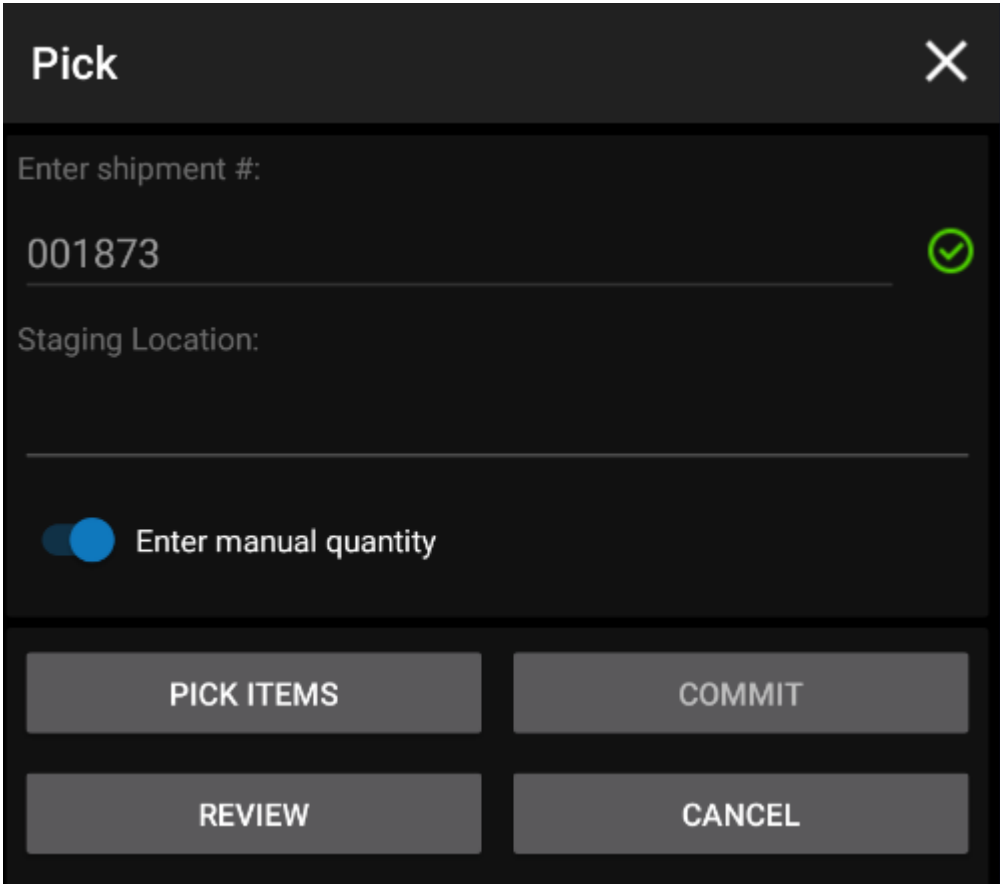
1. **Pick** and then **Pack.** This assumes a two-step process where shipments are first picked. This will move the picked items to a designated location (Typically SHIP). There, a second process, Pack,

allows for the assembly of containers.

- a. **SO Pick.** A shipment number may be scanned or entered into the Shipment field or the operator may select Get Next. Get Next will present the next available shipment available (See Zone Picking). LOAD will load the shipment to the handheld.

Once a shipment is loaded onto the handheld, the user is presented with the ability to REVIEW (the pick), CANCEL, or PICK ITEMS. PICK ITEMS will present the user with the items in pick sequence order. The process is to scan/enter the location, and the item and enter the quantity. If entering the lot or serial number is required the user will be prompted for the same for confirmation.

**Note:** there is the ability to scan each item rather than entering the quantity if desired.



Pick

Enter shipment #:

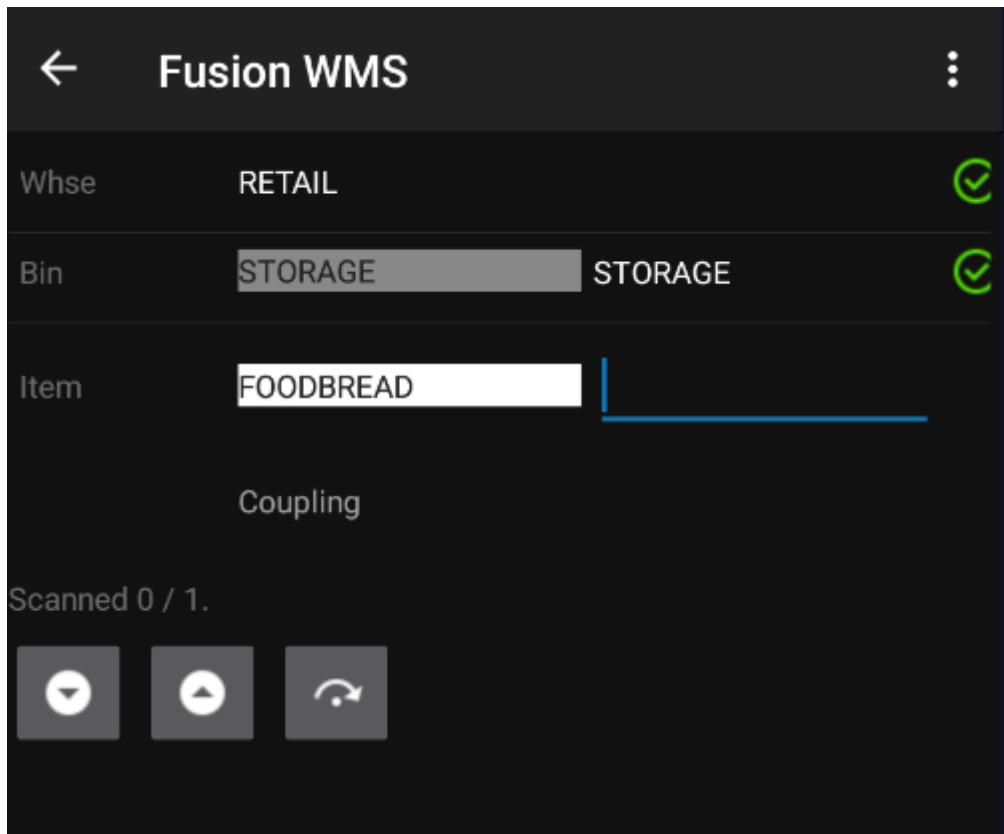
001873

Staging Location:

Enter manual quantity

PICK ITEMS COMMIT

REVIEW CANCEL



When all items have been picked, COMMIT will be available. COMMIT will create a transfer in Acumatica moving the items from their picked location to the Shipping Location for the Warehouse as defined. the Pick Status of the shipment in Acumatica to Picked.

- b. **Wave Pick.** Wave picking allows you to combine multiple shipments into a single pick list. The Wave Pick process is handled separately from that of standard picking. To wave pick you first must select the shipments to be included on the wave.

Please note: Wave Picking can be done via paper picking or paperless picking. The Wave Pick can be created in one of two areas:

To create a wave pick from the Process Shipments screen you will select the action Create Wave Pick.



Process Shipments

PROCESS PROCESS ALL

Action: **Create Wave Pick**  
Start Date: <SELECT>  
End Date:  
Invoice Date:

Customer:   
Carrier:   
Ship Via:   
Packaging Type: Auto and Manual

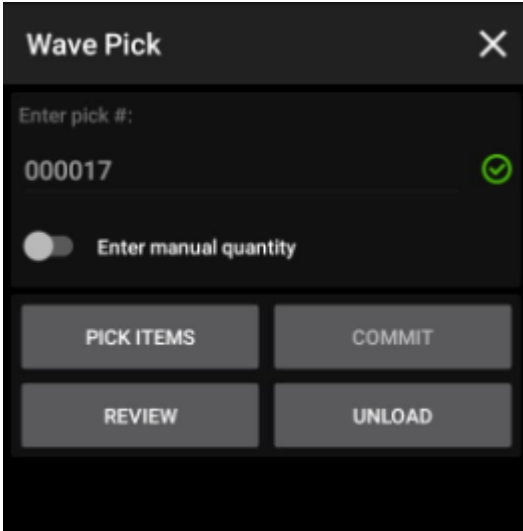
Inventory ID:   
Warehouse: WHOLESALE - Wholesale 1  
Location:   
Zone:

Print Options: Combined  
Max. Qty in Lines: 0  
Max. Number of L...

Shipment Nbr	Status	Shipment Date	Customer Name	Shipped Quantity	Shipped Weight	Shipped Volume	Created On	Order Priority
004179	Open	8/9/2022	ABC Holdings Inc	90.00	62.900000	165.000000	2022-08-09 12:21:08	3 - Standa
004197	Open	11/22/2022	USA Bartending School	500.00	24,500.000000	5,000.000000	2022-11-22 15:42:29	3 - Standa
004206	Open	12/8/2022	Antun's of Westchester	175.00	5,940.750000	930.000000	2022-12-08 13:12:08	3 - Standa
004207	Open	12/8/2022	Baker Development	1,018.00	43,714.020000	7,358.000000	2022-12-08 13:12:11	3 - Standa
004209	Open	12/8/2022	USA Bartending School	10.00	27.200000	30.000000	2022-12-08 13:12:16	3 - Standa
004213	Open	12/15/2022	Alta Ace	60.00	698.100000	500.000000	2022-12-15 12:31:57	3 - Standa
004214	Open	12/15/2022	USA Bartending School	125.00	527.500000	155.000000	2022-12-15 12:31:59	3 - Standa
004215	Open	12/15/2022	ABC Holdings Inc	150.00	14,370.000000	1,925.000000	2022-12-15 12:32:00	3 - Standa
004219	Open	12/15/2022	Products Retail	50.00	294.500000	300.000000	2022-12-15 14:26:23	3 - Standa
004227	Open	1/11/2023	Baker Development	175.00	339.250000	800.000000	2023-01-11 08:21:55	3 - Standa
004239	Open	2/3/2023	ABC Holdings Inc	3.00	0.000000	0.000000	2023-02-03 13:24:01	3 - Standa
004240	Open	2/21/2023	ABC Holdings Inc	4.00	201.480000	61.000000	2023-02-21 08:13:41	3 - Standa
004249	Open	2/27/2023	USA Bartending School	3.00	1.500000	0.900000	2023-02-27 08:27:21	3 - Standa
004257	Open	3/7/2023	USA Bartending School	6.00	0.000000	0.000000	2023-03-07 13:10:22	3 - Standa
004265	Open	3/10/2023	USA Bartending School	65.00	7,466.550000	975.000000	2023-03-10 13:27:45	3 - Standa
004287	Open	3/10/2023	Alta Ace	5.00	161.120000	41.000000	2023-03-10 14:11:37	3 - Standa

Kensium WMS has added certain desired fields such as Zone and Create Date / Time which are helpful when determining what shipments to include on a wave pick. When selected you will show a list of shipments available to be included in the wave pick. Once selected these shipments these shipments will be included in the wave Pick and not available for individual Pick.





The screenshot shows a mobile application interface titled "Wave Pick" with a close button (X) in the top right corner. Below the title, there is a text input field labeled "Enter pick #:" containing the number "000017" and a green checkmark icon to its right. Below the input field is a toggle switch labeled "Enter manual quantity" which is currently turned off. At the bottom of the screen, there are four buttons arranged in a 2x2 grid: "PICK ITEMS", "COMMIT", "REVIEW", and "UNLOAD".

Scan or enter the wave pick number and the operator will be routed through the warehouse in an optimum manner to pick all the items included on the wave. The handheld will reflect the location, items, and combined quantities. The paper pick list will reflect the distribution of those contents among the selected shipments.

- c. **Pack.** Select PACK to pack shipments which have been picked. Note to be eligible to PACK items must be in the Shipping Location and the shipment must be marked Picked. The capabilities of PACK will depend on what modules are installed.

After selecting the PACK icon from the handheld enter or scan the shipment number and you will be presented with the following menu:



As with other menus REVIEW will show each line item, the quantity on the order and the quantity packed thus far. Activity from previous sessions will also be highlighted.

Select Pack and Kensium WMS assumes you are packing a container i.e., box pallet, etc. and the default Box ID will be presented. In this case Pallet. This may be overridden by scanning or entering another Box ID. After confirming the Box, the item to be packed is presented along with the quantity. After scanning the item and entering the quantity the next item to be packed will be presented. At any time by selecting Container, you may create another box by either scanning an existing container or creating a new container.



### ← Fusion WMS

Whse: WHOLESALE ✓

Container: 001 - New Container1 ✓

Weight: 0

Box ID: Pallet ✓

Bin: SHIP ✓

Item: CONBABY1 CONBABY1 ✓  
South Shore Savannah Changing Table

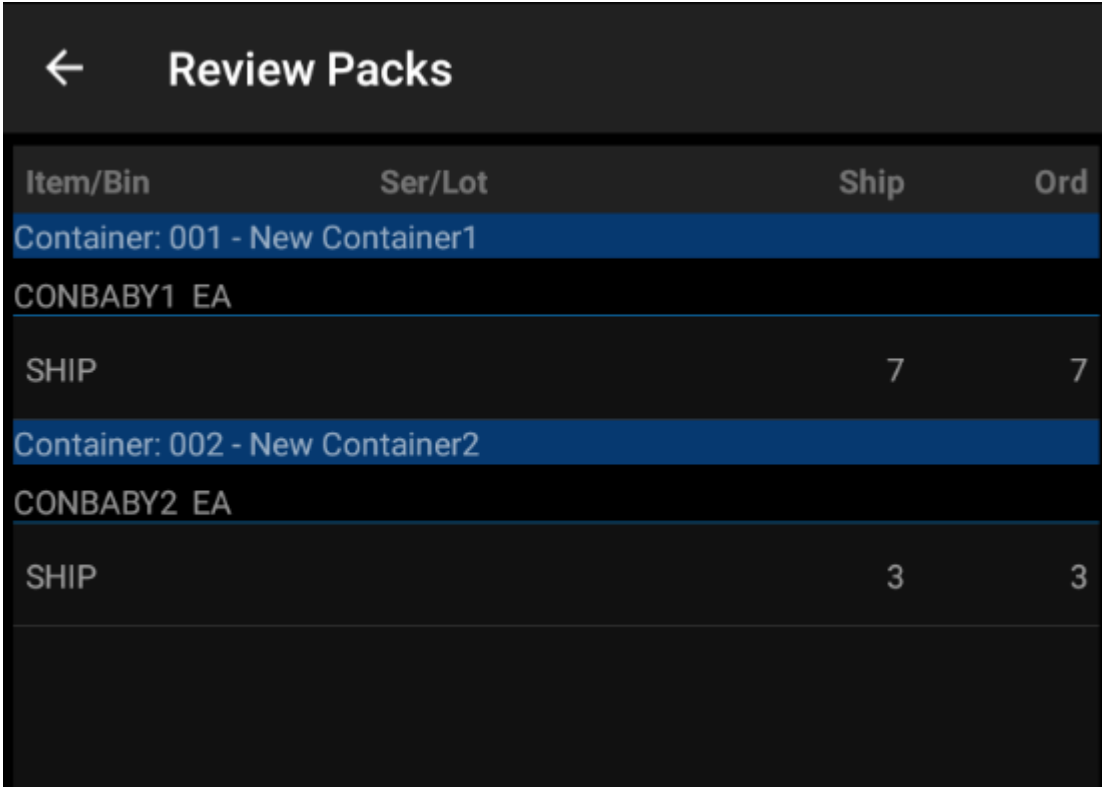
UOM: EA EA ✓

Photos

Qty:

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In this example two containers were created each with one item as seen in the REVIEW presented below:

Item/Bin	Ser/Lot	Ship	Ord
Container: 001 - New Container1			
CONBABY1 EA			
SHIP		7	7
Container: 002 - New Container2			
CONBABY2 EA			
SHIP		3	3

Selecting SAVE will create the containers in Acumatica. Note that Acumatica Packages are not created. Once saved, the weight can be entered, and a container label printed from the handheld. Containers can be unpacked and repacked as needed before Acumatica Packages are created. COMMIT will create the Packages on the Acumatica Shipment and change the Pick Status to Packed.



Shipments  
004346 - Alta Ace

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Shipment Nbr:	004346	Customer:	AACUSTOMER - Alta Ace	Shipped Quantity:	10.00
Type:	Shipment	Location:	MAIN - Primary Location	Shipped Weight:	300.190000
Status:	Open	Warehouse ID:	WHOLESALE - Wholesale Warehouse	Shipped Volume:	158.000000
Operation:	Issue	Order Priority:	3 - Standard	Packages:	2
Shipment Date:	6/29/2023	Workgroup:		Package Weight:	308.190000
		Owner:	Maxwell Baker	Staging Location:	
				Pick Status:	Packed

Description:

DETAILS ORDERS SHIPPING PACKAGES

GENERATE PACKAGES

Confirm	Box ID	Type	Description	Weight	Manuz Weigh	Custom Ref. Nbr. 2	UOM	Length	Width	Height	Declared Value	C.O.D. Amount	Tracking Number
<input type="checkbox"/>	PALLET	Manual		286.5200	<input type="checkbox"/>	PID-000330	KG	122	122	182	1,178.0300	0.0000	
<input type="checkbox"/>	PALLET	Manual		21.6700	<input type="checkbox"/>	PID-000331	KG	122	122	182	1,808.3400	0.0000	

Contents of Selected Package

ShipmentNbr	Shipmer	PackageLi	Shipmer Split Line Nbr.	Inventory ID	Lot/Serial Nbr.	UOM	Description	Quantity
004346	1	1	2	CONBABY1		EA	South Shore Savannah Changing Table	5.00
004346	3	1	4	CONBABY1		EA	South Shore Savannah Changing Table	2.00

2. **PICK to PACK.** This requires Kensium WMS Advanced and assumes that containers are assembled during the pick. For a large LTL or TL shipment the picker will grab a pallet or stack of boxes and begin assembling one or more container(s) while picking. The picker is required to select a container before beginning picking.
  - a. **Pick to Container** Once a shipment has been loaded into the handheld the user is presented with several options: PICK ITEMS, REVIEW, CANCEL. Select PICK ITEMS to begin.





### Pick & Pack ✕

Enter shipment #:

001941 ◆

Staging Location:

Enter manual quantity

PICK ITEMS      SAVE

REVIEW      CANCEL

WEIGHT & COMMIT

The next step is to select a container.

← Fusion WMS ⋮

Whse      RETAIL ◆

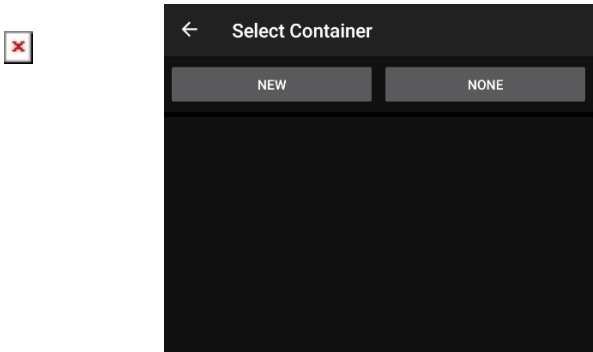
Container      (none) ⊕

Weight      0

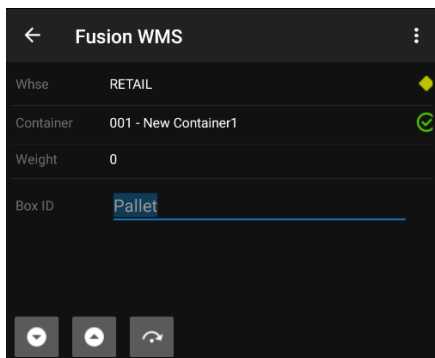
Box ID      Pallet

⏪   ⏩   ↺

## Select Container



## Select New or choose Container



## Pack Container

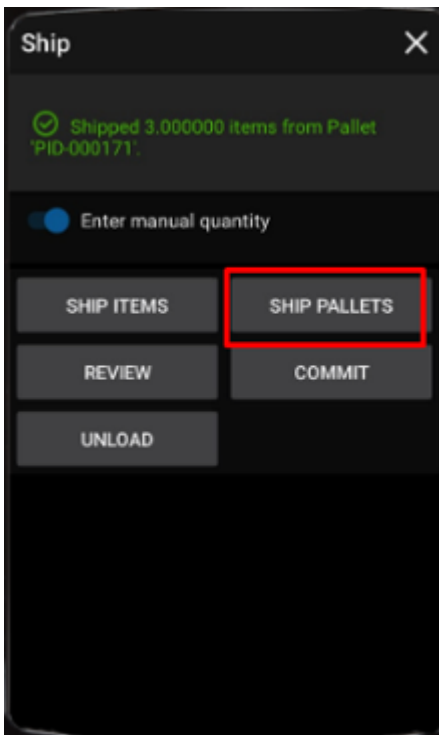
At any time, the user may move between containers by selecting the target container before scanning the next item.

- b. **REVIEW.** At any time before selecting SAVE, the user may review packed items by selecting REVIEW which will display the containers with contents.
- c. **SAVE.** When items are packed as desired, select SAVE which will create the containers in Acumatica. Note, that packages on the Acumatica shipment are not created until COMMIT.
- d. **WEIGH & COMMIT.** Once packed and created the user may now enter the weight of the user may now enter the weight of the container by scanning/selecting the container and entering the weight. With the weight entered, selecting COMMIT will create the packages on the Acumatica Shipment along with the box dimensions and weight.

## Ship

The ship is an elective final step in the shipping process. Elective because a shipment can be confirmed through the packing process if desired. However, in those cases where a shipment may be picked, packed, and staged for future completion, SHIP can be used to confirm the final shipment in Acumatica.

Select the Ship Icon and the operator will select items or containers. Selecting containers will present a list of containers on the shipment. When all of the containers are scanned, as indicated by the green check box, the operator may Commit the shipment which will Confirm the shipment in Acumatica.





KENSIUM  
WMS

