

# Warehouse Insight

## User Guide

## 2.3

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# Version

| Date | Author | Version | Change |
|---|---|---|---|
| April 7, 2014 | Tim Dimsdale | 1.0 | Initial Version |
| May 3, 2017 | R. Trudeau | 1.8 | Updated for 1.8 |
| February 1, 2019 | R. Trudeau | 2.0 | Re-written for 2.0 (Android) |
| May 14, 2020 | R. Trudeau | 2.1 | Updated for 2.1 and Business Central SaaS |
| July 31, 2020 | R. Trudeau | 2.2 | Updated for 2.2 |
| October 1, 2020 | R. Trudeau | 2.3 | Updated for 2.3 |

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# 1 Introduction

This document is intended to provide an overview of the basic usage and capabilities of the Warehouse Insight application.

The Warehouse Insight software behaves significantly different based on your Business Central configuration choices. This document will attempt to illustrate the most common scenarios and practices but will undoubtedly not cover every possible combination of choices or scenarios. Your specifics may be different for your installation however the flow and general concepts will be largely the same.

Please contact your partner to discuss your detailed configuration and customization needs.

For additional assistance contact Support:

**E-Mail**: support@dynms.com

**Phone**: 1-877-440-7543

**Support Portal**: http://support.dynms.com/

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# 2 Overview

There are concepts that apply for the most part throughout the application. This section will describe those general concepts and subsequent sections will detail individual modules. Where applicable the individual modules will override the general behavior described here.

## 2.1 General Terminology and Phrases

| Terminology | Description |
|---|---|
| Scanning Items | When asked to "Scan an Item" this refers to the act of scanning a physical piece of inventory (Item). Item barcodes can be as simple as the Item number or contain complex data such as lot numbers, quantities and expiration dates. What happens after an Item barcode is scanned depends on the application, Item configuration, the data contained in the barcode and the 'Scan Behaviors' configuration. For instance, on some screens a Quantity dialog may appear while on the same screen if it is serial tracked and the barcode has a serial number in it the dialog may not display at all. |
| Scanning Bins | When asked to "Scan a Bin" this refers to the act of scanning a Bin label. The Bin labels may be just the Bin Code from Business Central or be prefixed with the '%B%' and then the Bin Code. Typically, after scanning a Bin the screen will update to indicate what your active Bin is and most often then wait for a corresponding Item scan. |
| Scanning Documents | When asked to "Scan a Document" this refers to scanning a specific document barcode. The document types (Sales Order, Purchase Order, Whse. Receipt, Pick, etc.) each have their own special barcode format. More information on the barcode formats can be found on in the Data Encoding section below.<br><br>Typically, users will be asked to scan a Document barcode when on the lookup screen for a particular application. Scanning a Document barcode is optional but will avoid the extra step of having to search/filter for the appropriate document to work on. E.g. Users could scan a Pick barcode and have it automatically open the correct Pick rather than searching the list for the Pick. |
| Enter Quantity | When "Enter Quantity" is referred to this indicates that users will be asked to enter a quantity to handle (receive, ship, pick, count, move, etc.). The Quantity dialog displayed to the user will be dependent on the Item Tracking requirements and application needs. For instance, if the Item requires lot information then users will be asked to specify the lot number as well as the quantity. |

## 2.2 Barcodes

Barcoding is a key feature of Warehouse Insight. When discussing barcodes there are two primary focuses:

1. Symbology

This refers to the type of barcode. E.g. Data Matrix, Code 39, UPC, GS128, QR.

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Warehouse Insight does not interact with the Symbology directly. Instead the handheld devices/scanners are configured to read these symbology's and on a successful scan send the data to the application as text.

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 Note: If your scanner is not reading (e.g. light stays red) please consult the device's scanner settings for how to configure various barcode symbology's. If the scan is read correctly (e.g. light turns green or beeps) but nothing occurs in the Warehouse Insight software contact support for additional assistance.

---

## 2. Data Encoding

This refers to the data encoded inside the barcode. The data (barcode formats) that Warehouse Insight supports are contained in the following table. Item and Bin barcodes are discussed in additional detail in the subsequent sections.

| Type | Format | Example(s) |
|---|---|---|
| Bin | %B%BinCode | %B%A01-03 |
| Count Sheet | %C%CountSheetName | %C%TEAM-01 |
| Count Tag | %TG%BinCode/ShelfNumber<br>%TG%BinCode/TagNo | %TG%A01-03/ShelfC<br>%TG%A01-03/4786 |
| License Plate | %LP%LicensePlateNumber | %LP%LP00001 |
| License Plate Template | %LPT%LicensePlateTemplateCode | %LPT%8INCHBOX |
| Location | %LOC%LocationCode | %LOC%WHITE |
| Production Order | %P%ProdOrderNumber LineNumber LN:LotNumber (optional) SN:SerialNumber (optional) | %P%RP00001 10000<br>%P%RP00001 10000 LN:001<br>%P%RP00001 10000 SN:001 |
| Purchase Order | %PO%PurchaseOrderNumber | %PO%PO000001 |
| Sales Order | %S%SalesOrderNumber | %S%SO000001 |
| Transfer Order | %T%TransferOrderNumber | %T%TO000001 |

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| | | |
|---|---|---|
| Whse. Activity | %A%ActivityNumber ActivityType | (whse. put-away) %A%PU00001 1<br>(whse. pick) %A%PI00001 2<br>(whse. move) %A%WM00001 3<br>(invt. put-away) %A%IPU00001 4<br>(int. pick) %A%IPI00001 5 |
| Whse. Receipt | %R%ReceiptNumber | %R%WR000001 |
| Whse. Shipment | %WS%ShipmentNumber | %WS%WS000001 |
| Assembly Order | %AO%AssemblyOrderNumber | %AO%A00007 |

Examples of the various barcodes can be found on the Support Portal.

### 2.2.1 Bin Barcodes

Bin barcodes are a core requirement for Warehouse Insight (if Bins are enabled for your location). Bin barcodes can either be just the Bin Code or can be prefixed with the "%B%" as shown in the Barcode Formats table.

If you do not already have your warehouse labeled with Bin barcodes it is advisable to print them with the "%B%" format and to set the "Force Bin Prefix" option to "Yes" on the Device Configuration Card as this will cut down the communication from the handhelds to Business Central.

Note: You may use the Bin Label report in Business Central to print out labels for your warehouse or to serve as a starting point for developing your own label.

If your Bins are already labelled (typically just the Bin Code) then you do not need to re-label.

Note: With "Force Bin Prefix" set to No in Business Central you cannot have items that are numbered the same as a Bin as the software will always assume it's a bin when scanned.

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## 2.2.2 Item Barcodes

Item barcodes can come in a wide range of formats. They can be vendor or customer supplied (e.g. UPC Codes, GS1 formatted) or client supplied/generated and can include numerous pieces of information not limited to just the Item number (quantities, variants, units of measure, expiration dates, etc.).

If designing your own Item Barcode labels Warehouse Insight provides several samples in the Warehouse Insight department menu that you can use as a reference. The sample labels provided come in two types of symbology's:

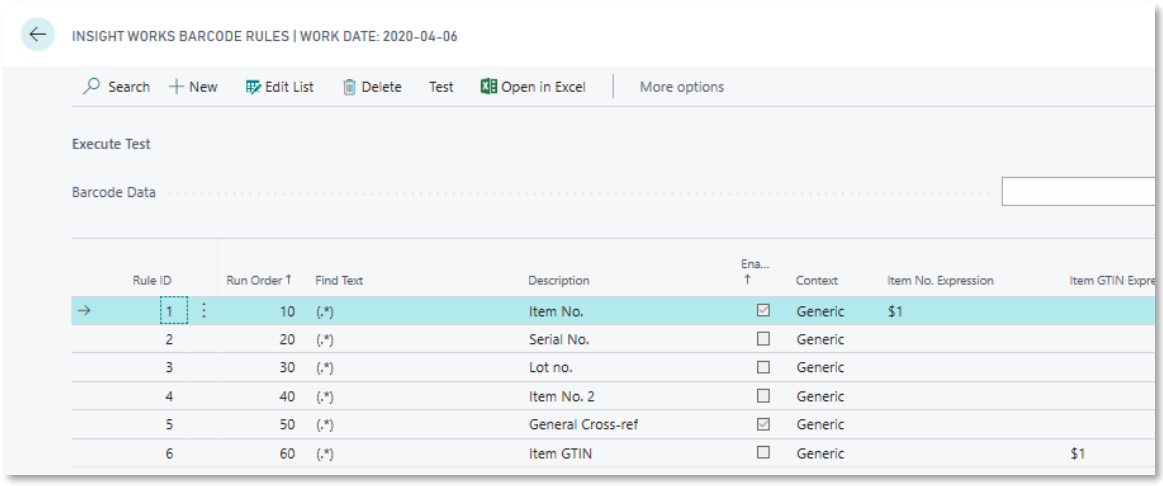
- Data Matrix
  - 2D barcode
- Code 39
  - 1D barcode

You may copy, renumber and or modify the reports as desired. When choosing a barcode symbology, it is best to use a 2D barcode (e.g. Data Matrix) if the data you wish to encode is long and/or contains special characters.

Note: If further assistance is required please contact support and a development team member will be able to assist.

### *2.2.2.1 Item Barcode Rules*

Depending on your environment you may have a mix of barcodes and data formats. In order to handle this requirement, the application uses the Barcode Rules page. The Barcode Rules allow you to configure the logic used to decode each barcode data to correctly return the various pieces of information.




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By default, the installation process will preload a number of common rules. However, as a best practice it is best to review the ones provided and disable any rules that do not pertain to your organizational needs.

Configuring the Item Barcode Rules to correctly interpret/parse a barcode requires a knowledge of Regular Expression syntax.

Barcode Rules break out into the following pieces:

- Run Order
    - Use this to indicate the order rules are processed in. If a successful match is made no further rules are processed. Therefore, your most common rules should come first to avoid unnecessary processing.
- Find Text
    - This is the regular expression string used to parse the barcode data
        - Example: 01(.*)17([0-9]{6})10(.*)
- Expression Groups
    - For each 'group' matched by the regular expression use the "$1", "$2", "$3"… in the "Expressions" to set the appropriate value

Barcode rules can be used to capture/interpret the following information:

- Item No.
- Item No. 2
    - This will be used to find the Item No. if not already part of the barcode
- Variant Code
- Serial No.
    - This will be used to find the Item No. if not already part of the barcode
- Lot No.
    - This will be used to find the Item No. if not already part of the barcode
- Expiry Date
- Cross Reference No.
    - This will be used to find the Item No. if not already part of the barcode
- Unit of Measure
- Quantity

If the regular expressions are not sufficient (e.g. referencing additional tables) AL code can be written by subscribing to the appropriate events.

The data parsed by the rule will be sent back to the devices and will be used if possible to help minimize data entry or to take additional actions.

For example, consider a barcode in the format: "[Item Number] [LotNumber]" with a physical scan of: "80216-T LOT123".

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Scanning the item during shipping will cause the correct line to be selected and the quantity dialog to appear with the lot number entry already filled in with "LOT123".

The same scenario though with a barcode format of: "[Item Number]" with a physical scan of: "80216-T" will still select the correct line but the quantity dialog when displayed will have the lot number entry blank requiring the user to type in the correct value manually.


Note: If the Item barcode contains a Serial or Lot number the barcode rules can be used to automatically retrieve the Item number, expiration, variant and even quantity which can often improve performance, reduce errors and reduce barcode/label sizes.


Note: For additional assistance interpreting or creating Item Barcode Rules contact Support.

### 2.2.3 Example – Creating a Barcode Rule

This section will guide you step by step in the process of defining and configuring a sample barcode rule.

Goal: Create a rule that will be able to parse a barcode that has Item, Variant Code and Quantity in the barcode data.

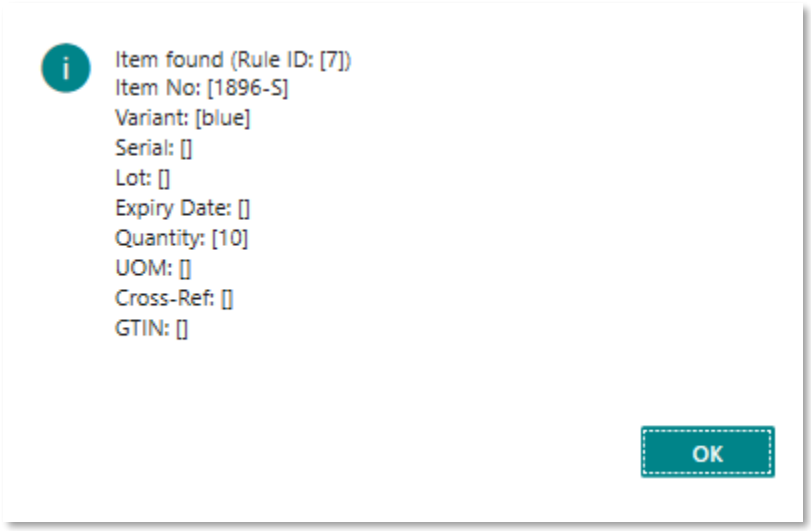
Steps:

1. Open the Barcode Rules page in Business Central
2. Create a new line
3. Set the following fields:
    a. **Run Order**: "70"
        i. This will indicate in which order the rule should be processed. Lower numbers will be processed first and if a match is found no other rules will be looked at.
    b. **Find Text**: "(.*)/(.*)/(.*)
        i. This is the regular expression that we will use to parse our barcode data with. In this case we are saying we will have 3 groups separated by a "/".
    c. **Description**: "Item + Variant + Quantity"
        i. This can be anything you like and is just used to let others know at a quick glance what the rule is looking for.

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d. **Enabled**: "Checked"
    i. If the rule is disabled it will not be processed by the system.
e. **Item No. Expression**: "$1"
    i. The "$1" means that the first group result, whatever that is, will be put into the "Item No. Result" when the barcode is processed.
f. **Variant Expression**: "$2"
    i. The "$2" means that the second group result, whatever that is, will be put into the "Variant Result" when the barcode is processed.
g. **Quantity Expression**: "$3"
    i. The "$3" means that the third group result, whatever that is, will be put into the "Quantity Result".

To test the barcode rule you've just created you can use the "Test All Rules" action on the page. Type "1896-S/blue/10" and press the "Test All Rules". You should see a dialog similar to this:

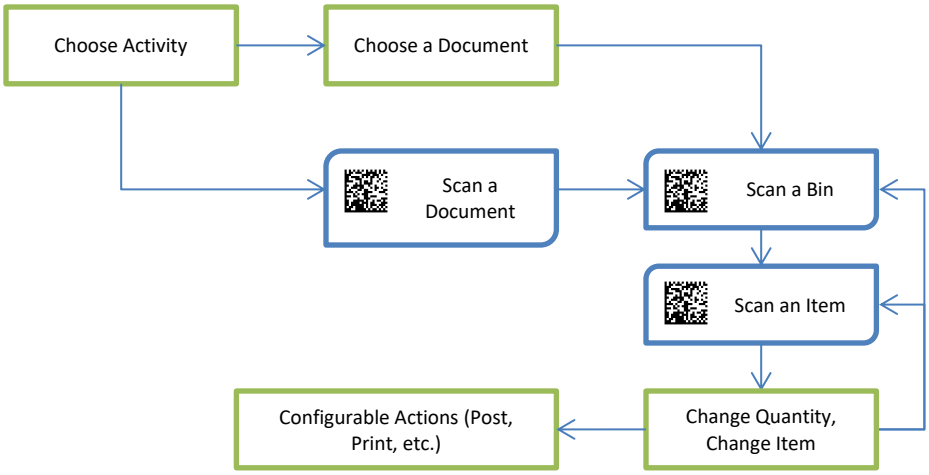



## 2.3 General Document Handling

Although specific activities can be found in each area the patterns are almost always the same:

1. Choose or scan a document to open
2. Scan a bin (when bins are mandatory for a location)
3. Scan an item
4. Enter Quantity (change quantity, record lot/serial info)

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When on a document application "Posting" will normally close the current document and bring the user back to the lookup screen.

***Note:*** *Users must close the current document before opening another.*

## 2.4 General Item Scanning Behavior

When scanning an Item to start an action there is "typical" behavior depending on the Item configuration but may be overridden/customized by the Scan Behaviors page in Business Central (default quantities, units of measure, if dialog is shown, etc.) and the Find Line Templates page.

When an Item is scanned on a document the application will normally first attempt to find a matching line based on the Bin (if applicable) and Item combination (see Find Line Templates in Business Central for more information on line matching). If a suitable line is found the line will be selected and a Quantity dialog displayed.

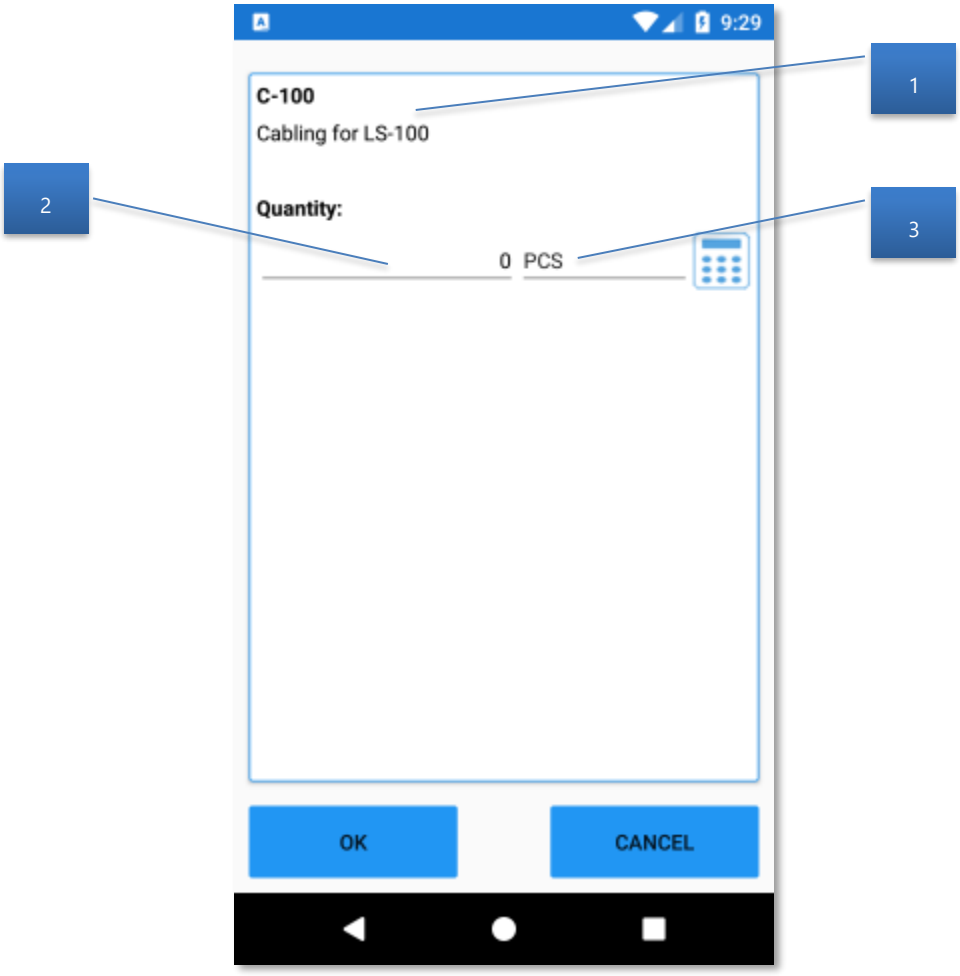
***Note:*** *If you use Variants, the default Find Line Templates will expect an exact match. If you wish for a more lenient match or your barcodes do not include variant information you will need to add additional template lines.*

The following sections are intended to be guidelines for general scanning item behavior but depending on the actual screen may be different. Any differences will be noted in the application specific section.

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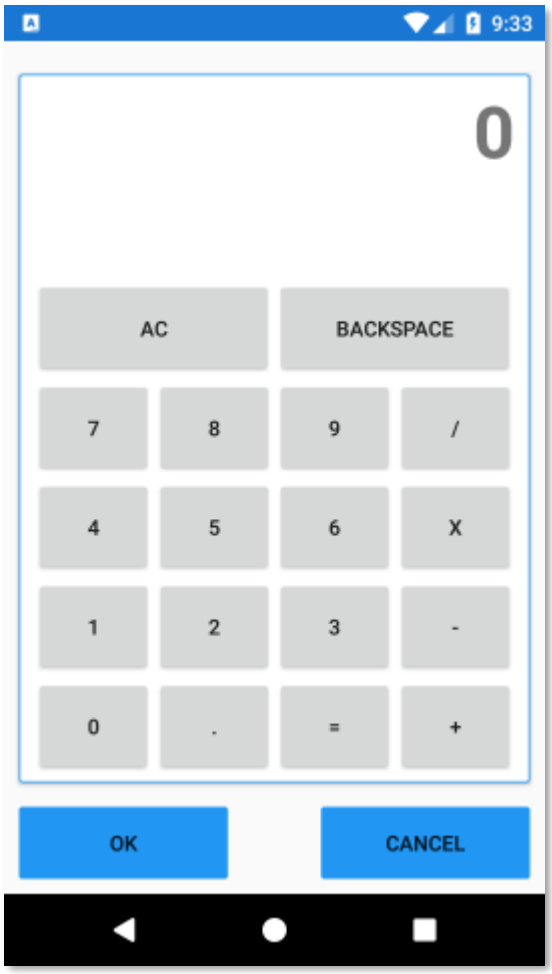
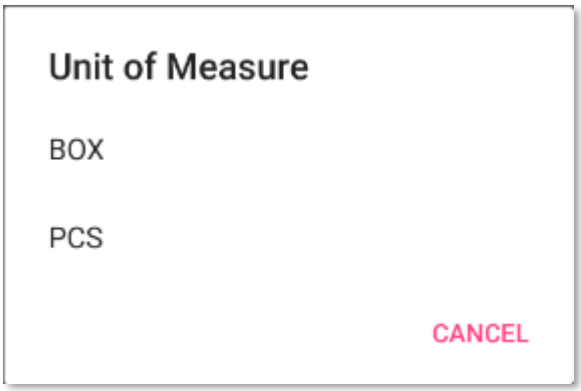
### 2.4.1 Scanning a Non-Tracked Item

When scanning an Item that does not require Item Tracking for the relevant document you will typically be presented with a Quantity dialog asking for Quantity and Unit of Measure.




| Callout ID | Description |
|---|---|
| 1 | Item Number and Description 1 & 2 |
| 2 | Quantity. When the  is pressed a calculator will be opened allowing the user to add/subtract to the quantity entered on the line. This is useful in some |

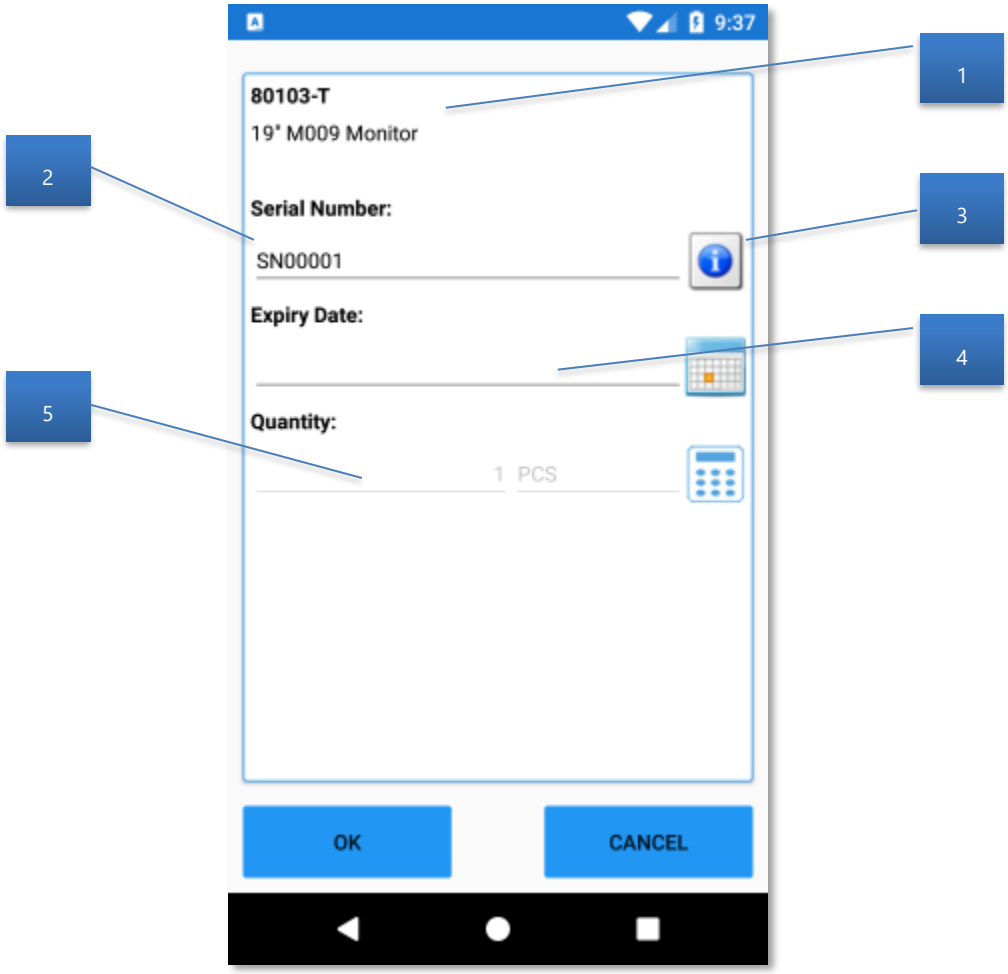
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| | |
|---|---|
| | circumstances like counting/receiving additional goods (multiple scans) or working with complex numbers (decimal places, large numbers).<br> |
| 3 | Unit of Measure. The default is usually the Line unit of measure (though can be configured via the Scan Behaviors). Users may choose an alternate Unit of Measure to work with by pressing the Unit of Measure field and the result will be converted to the source lines Unit of Measure.<br> |

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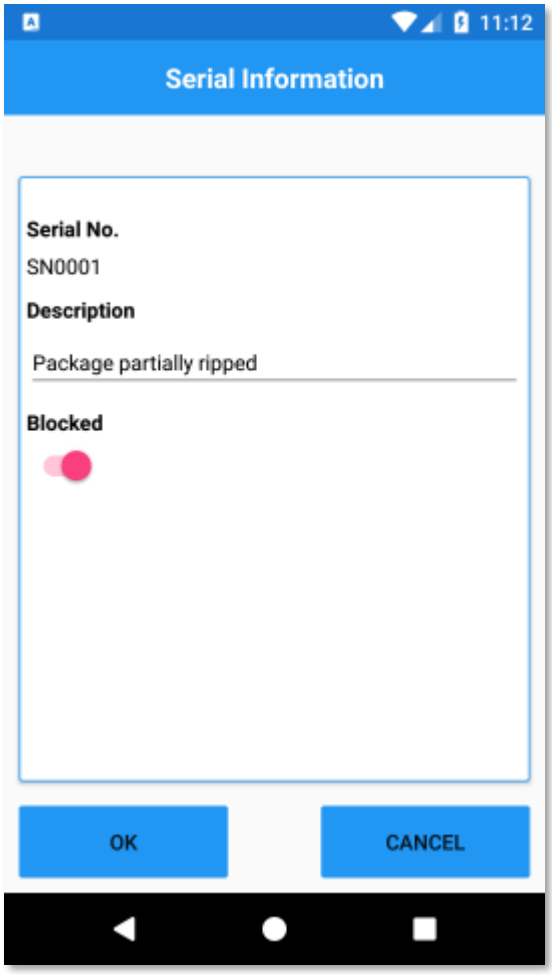
## 2.4.2 Scanning a Serial Tracked Item

When scanning an Item barcode that requires Serial numbers the Quantity dialog will typically be displayed asking for the Serial number. No quantity field is available as the amount is always assumed to be one. If the barcode scanned contains the Serial number, then the dialog will not typically be displayed but instead the source line will be incremented by one.

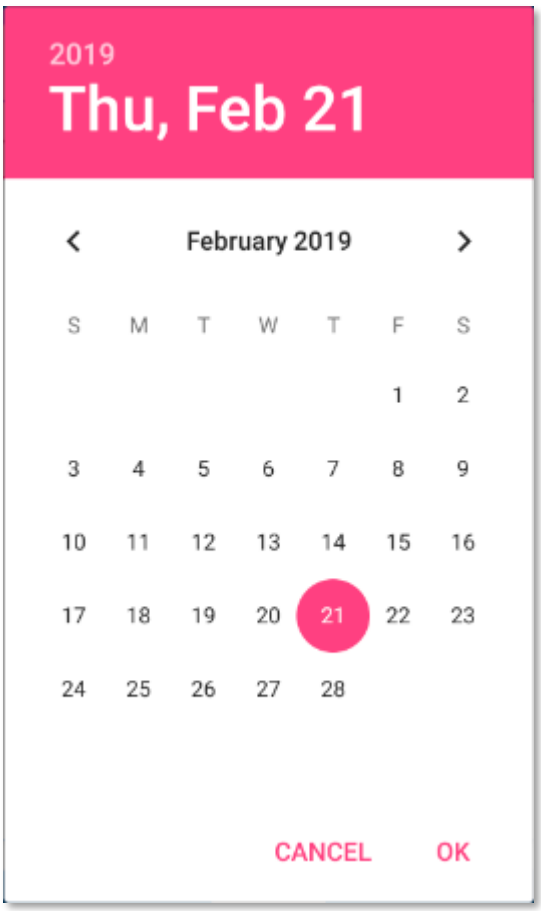



| Callout ID | Description |
|---|---|
| 1 | Item Number and Description 1 & 2 |
| 2 | Serial Number |
| 3 | Serial Information. When the  is pressed a serial Information Card will be created and users can fill in additional data for the Serial number. |

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| | |
|---|---|
| |  |

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| | |
|---|---|
| 4 | Expiration Date. When the  is pressed users will be able to select an expiration date.<br> |
| 5 | Quantity and unit of measure are not editable. Serialized items will always increment the quantity by 1 (base UOM). |

***Note:*** *If auto-generation of tracking information is configured (see Device Configuration in Business Central) then the Serial number will be pre-filled.*

***Note:*** *Warehouse Insight treats Serial Numbers as being unique and defaulting quantities of one. For situations where this may not apply or to allow Serial number and Lot numbers on the same Item please contact support for additional assistance.*

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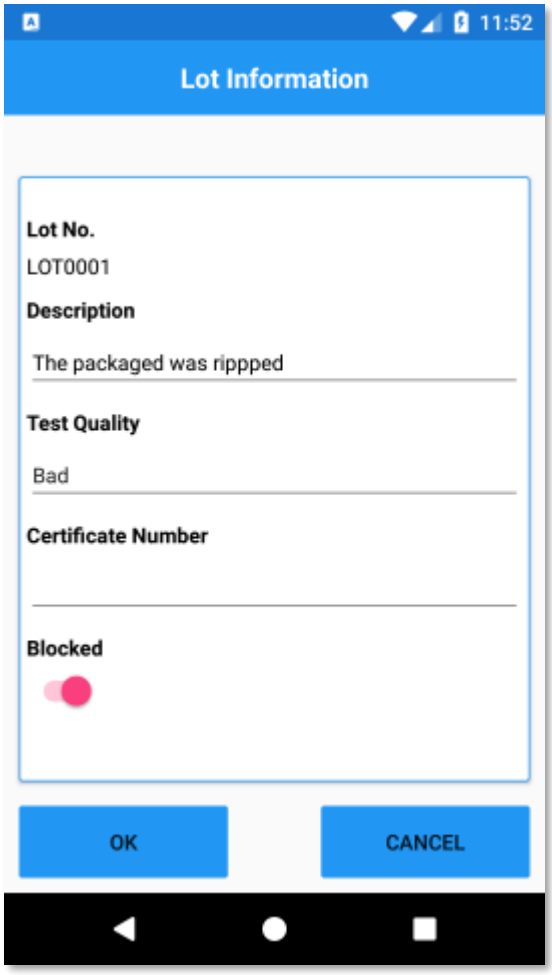
## 2.4.3 Scanning a Lot Tracked Item

When scanning an Item barcode that requires Lot numbers the Quantity dialog will typically be displayed asking for the Lot number and quantity. If the barcode scanned contains the Lot number, then the Lot number will be pre-filled in on the quantity dialog.

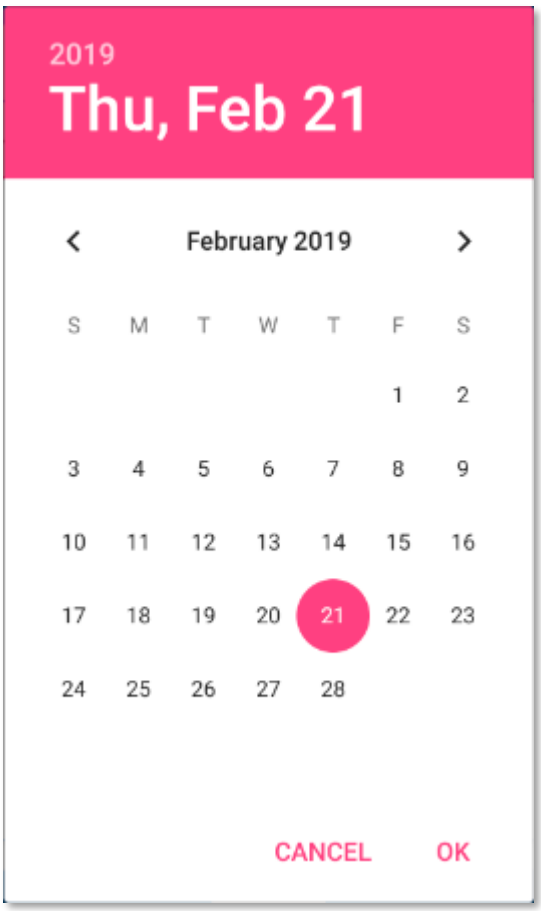



| Callout ID | Description |
|---|---|
| 1 | Item Number and Description 1 & 2 |
| 2 | Lot number |
| 3 | Lot Information. When the  is pressed a serial Information Card will be created and users can fill in additional data for the Serial number. |

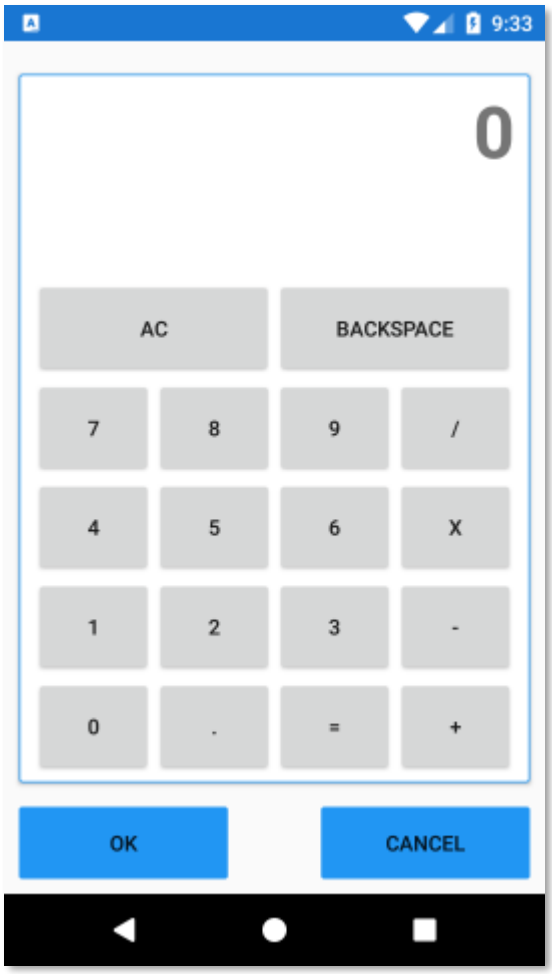
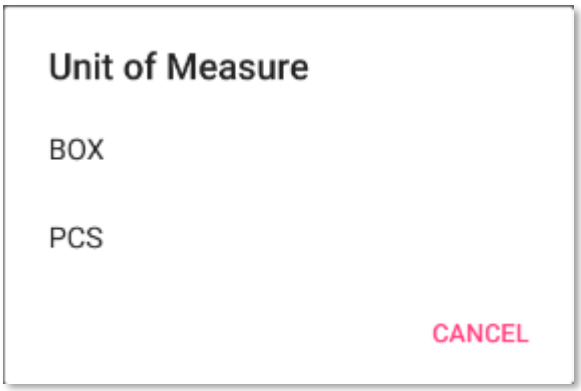
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| | |
|---|---|
| |  |

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| | |
|---|---|
| 4 | Expiration Date. When the  is pressed users will be able to select an expiration date.<br> |
| 5 | Quantity. When the  is pressed a calculator will be opened allowing the user to add/subtract to the quantity entered on the line. This is useful in some |

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| | |
|---|---|
| | circumstances like counting/receiving additional goods (multiple scans) or working with complex numbers (decimal places, large numbers).<br> |
| 6 | Unit of Measure. The default is usually the Line unit of measure (though can be configured via the Scan Behaviors). Users may choose an alternate Unit of Measure to work with by pressing the Unit of Measure field and the result will be converted to the source lines Unit of Measure.<br> |

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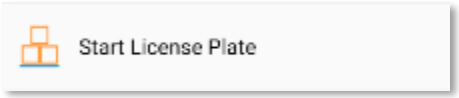
***Note:*** *If auto-generation of tracking information is configured (see Device Configuration in Business Central) then the Lot number will be pre-filled.*

## 2.5 Building a License Plate

Most applications allow for building of License Plates as part of the normal document handling. For example: creating a pallet during the picking process. If the document supports building a License Plate a menu option will be available called "Start License Plate".

To Build a License Plate the following steps would normally be taken:

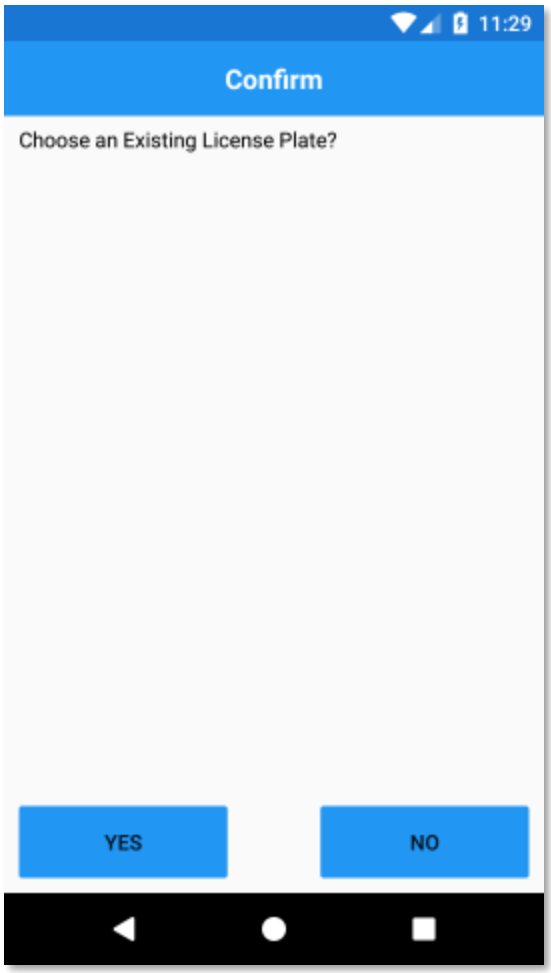
1. Press the "Start License Plate" menu option




***Note:*** *Alternately, users may scan a License Plate Template barcode to create a new License Plate instead of using the Start License Plate menu option. In addition, an existing License Plate label may be scanned to re-open that for processing.*

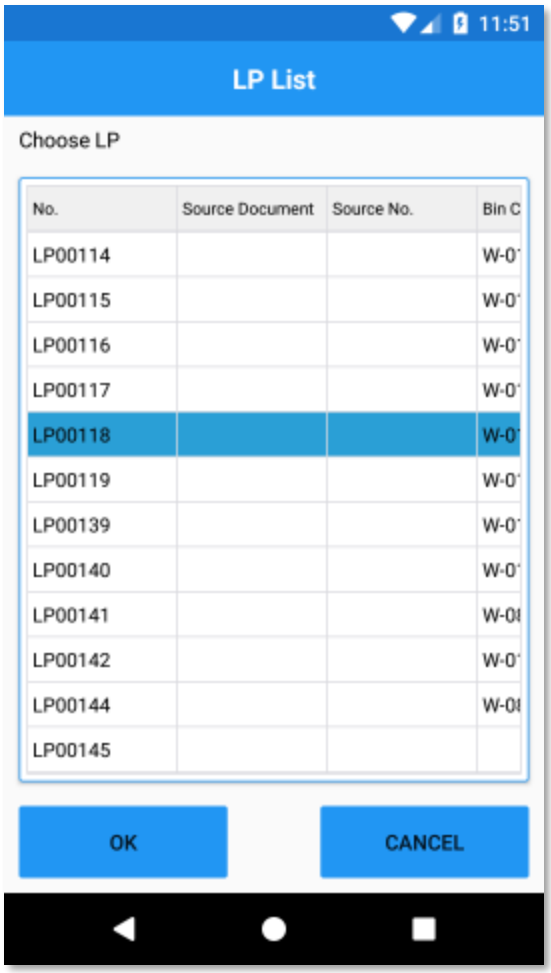
2. Users will be prompted whether they wish to re-open an existing License Plate or create a new one.

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3. If re-opening an existing License Plate is chosen a list of possible License Plates will be shown.

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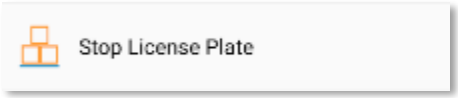



The list will be those that are un-assigned or already assigned to the document.

4. After selecting or creating a new License Plate the status bar will typically indicate which License Plate is being built.

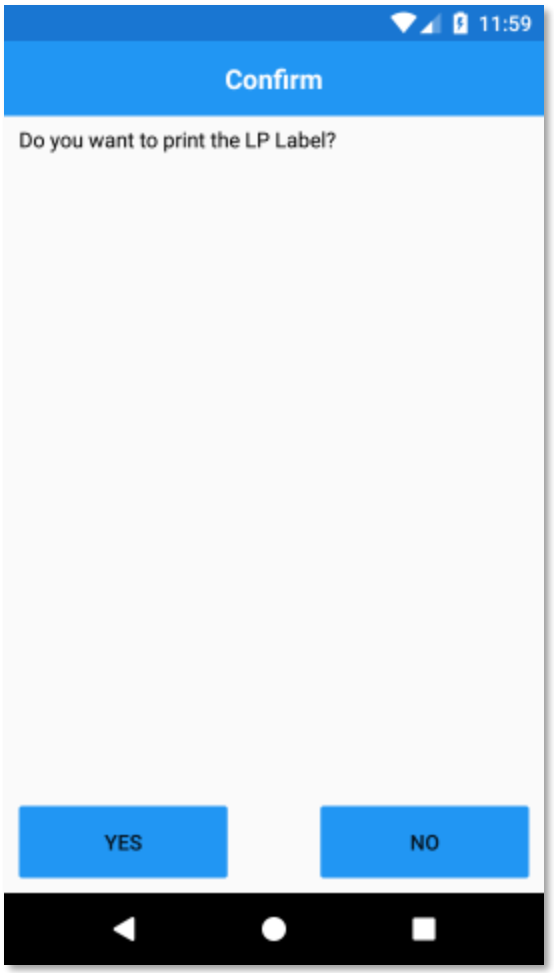



5. Proceed to handle the document as usual (scanning items, entering quantity). In most cases the Bin must be the same across all lines. Notable exceptions to this rule are when building a License Plate for a Pick/Shipment document.
6. When the License Plate is done, press the "Stop License Plate" menu option.




This will prompt the user whether a Label should be printed.

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***Configuration:*** *The License Plate Label that is printed is configured in the "Report Selections – Insight Works" page in Business Central.*

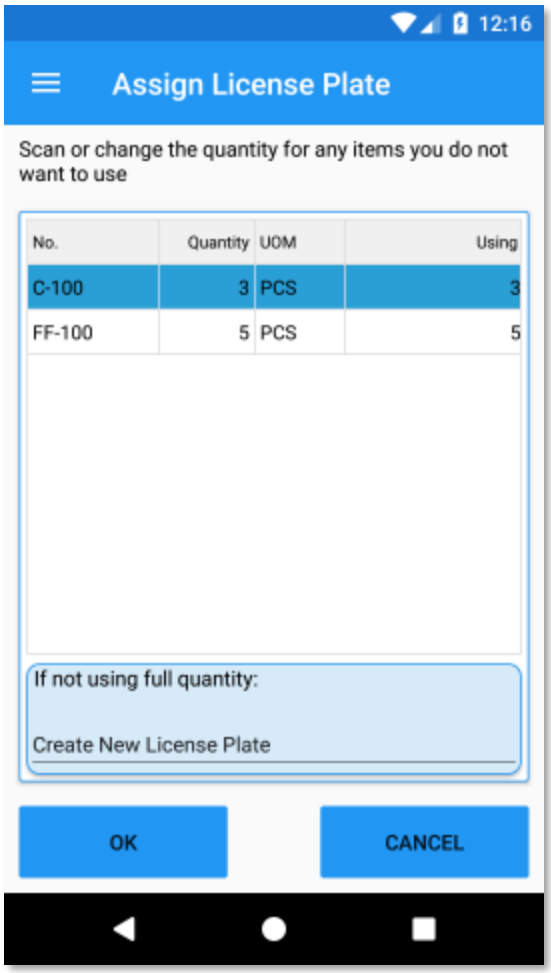
## 2.6 Using a License Plate

Most applications allow for using a pre-built License Plate as part of the normal document handling. For example: scanning a License Plate to pick from.

To use a License Plate the following steps would normally be taken:

1. Scan the Bin the License Plate is in
2. Scan the License Plate barcode
3. Users will be prompted to take an action based on the contents of the License Plate

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If the full quantity of the License Plate is not being used the possible handling options are:

- Create New License Plate

The unused Items will be moved to a new License Plate and the used Items will remain on the original License Plate and assigned to the document.

- Remove Excess

The unused Items will be removed from the License Plate (and left in the Bin) and the used Items will remain on the original License Plate and assigned to the document.

- Remove Used Portion

The used Items will be removed from the License Plate and assigned added to the document. The License Plate will remain in the Bin and not assigned to the document.

- Unbuild License Plate

The License Plate will be marked as "unbuilt" (e.g. destroyed). The used items will be added to the document and not License Plate assigned. The unused Items will no longer be in the License Plate and simply be left in the Bin.

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***Configuration:*** *The default option can be specified in the Device Configuration page in with the "LP Usage Action Behavior".*

4. Scan Items (or use the Change Quantity) menu option to change the Quantity to be used.
5. Press "OK" to accept the usage and assign (if applicable) the License Plate

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# 3 Configuration

There are two primary configuration points that need to be set up prior to utilizing the device software.

1. Business Central Device Configuration Code
2. Software Configuration

## 3.1 Business Central Device Configuration Code

Each handheld device must be pointed to a Device Configuration entry in Business Central. To configure a Device Configuration, open the Device Configurations page.

When creating a Device Configuration, the following fields are of particular importance:

| Field | Description |
|---|---|
| Code | The Code will be a unique identifier for this entry. E.g. DEVICE1, RECEIVING, TEST, etc.<br>If the Code is to be a specific login name, then you can leave the Code blank on the device and it will try to find a matching Device Configuration based on the login username. |
| Location Code | Each configuration can only reference a single Location Code. Use this field to indicate which Location the configuration is pointed to (and subsequently the handheld).<br>Typically, handhelds are for single locations but in some cases it's required that a single handheld reference multiple locations (E.g. Quarantine locations). In this case the handheld must switch 'Device Configurations' before working in the new location. This can either be done manually by the user or by scanning an appropriate "Device Configuration" barcode. |
| Label/Regular Printer Name | Specify a valid printer in these fields if users will be printing labels/documents from the handhelds.<br>Business Centrl: PrintNode must also be configured to print.<br>NAV On Premise: The printer chosen must be installed on the service tier server and be accessible to the user configured to run the NAV service. |
| Device Logo | Specify an appropriate company logo to display on the handhelds. By default, the Insight Works logo will be displayed on the handhelds. A nice practice is to also include in the logo the "Location" and whether it is a "Test" or "Live" company in order to avoid potentially confusing users. |
| Use Device Logo | Check this if you are using a logo and want it to show up on the device. |
| Extensibility Codeunit | If the Warehouse Insight installation has been customized/extended, you may specify the Extensibility Codeunit that was created in this field. |

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| | |
|---|---|
| Reclass/Whse. Reclass Batch Names | If using the Ad-Hoc Movement application these batch names should be unique to the Device Configuration and device to avoid overlap conflicts with other devices. If using logins, the batch name can be left blank but a corresponding batch name with the username must exist. |

When creating Device Configurations, it is not required to have a one-to-one relationship with the devices. A single configuration can be used for all devices if needed. Configurations can be created for any number of reasons (functional area separation like Receiving/Shipping vs. Warehouse operations), per device (Device1, Device2, etc.) or even per user (one Configuration for every user).

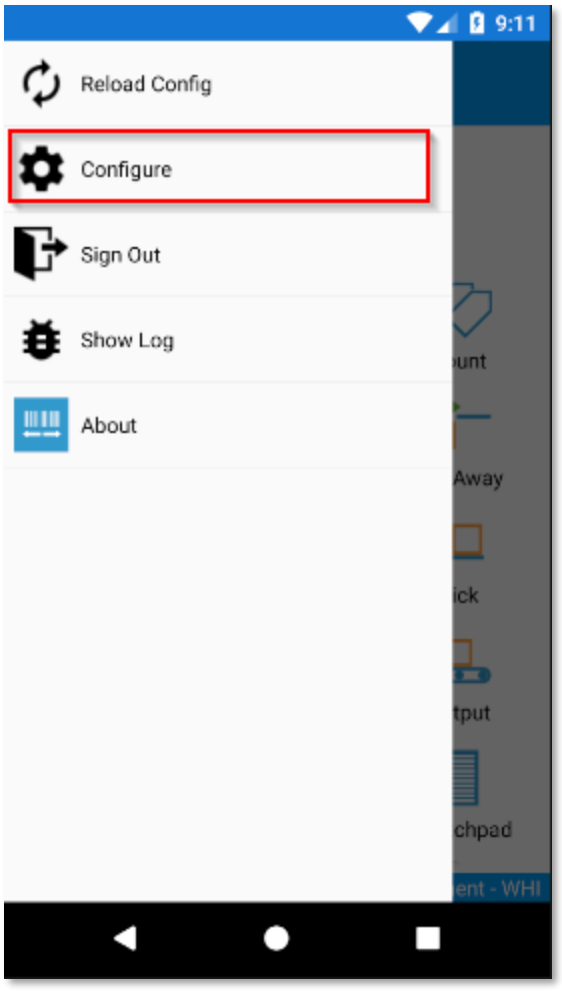
Splitting configurations often makes sense, but is not limited to, for the following reasons:

- Printers are different
    - If different areas have different printers it makes sense to use a Device Configuration relevant to that area
- Batch names conflict
    - If multiple people would end up using the same batch it is advisable to split out the configurations so no conflicts occur
- Setting mismatches per configuration
    - If a setting or menu needs to be toggled per configuration (says one device can "post" while another might not be able to)

## 3.2 Software Configuration

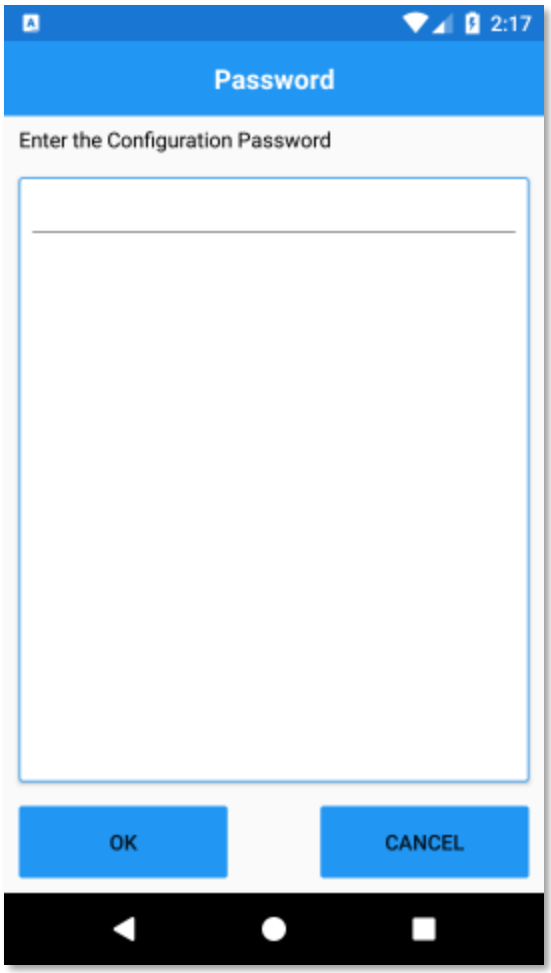
Software configuration is done by launching the Warehouse Insight application and selecting the "Configure" menu option.

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You will be asked for the Configuration password.  If you have not changed it, the default value will be “1234”.

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The configuration pages are broken down into 6 pages:

- System
- Logins
- Device
- Barcoding
- Logging
- Data

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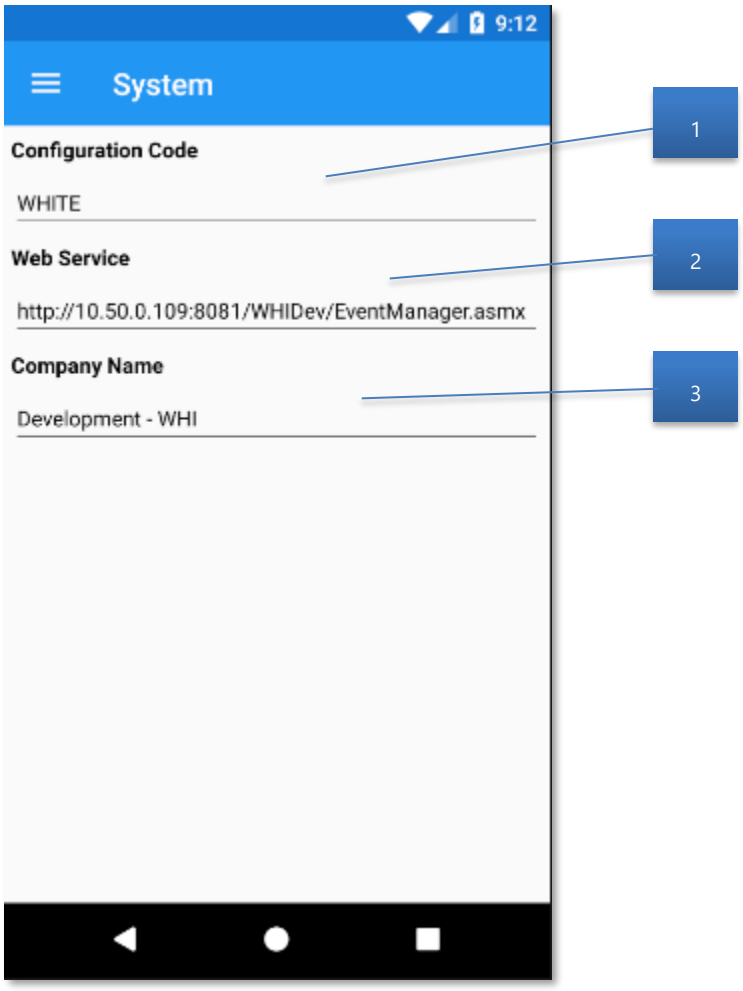
***Note:*** *It is possible to configure the primary settings by scanning a Configuration barcode. See the "Device Configuration Barcode" report in Business Central.*

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### 3.2.1 System Configuration Page

The System Configuration page is used to enter the primary connection details for connecting to Business Central.

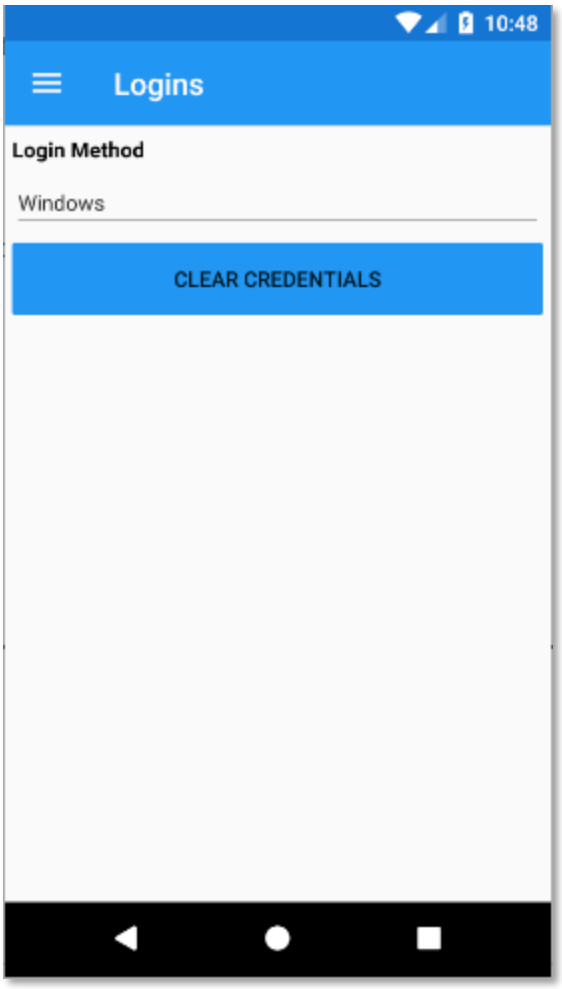



| Callout ID | Description |
|---|---|
| 1 | The Device Configuration Code created in Business Central. |
| 2 | The Warehouse Insight Web Service created during the initial installation process. |
| 3 | The Company name to connect to (case sensitive) |

### 3.2.2 Logins Configuration Page

The Logins Configuration page is used to toggle the login requirements for connecting to Business Central.

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Warehouse Insight supports a few levels of logins. The following table briefly describes these options.

| Option | Description |
|---|---|
| None | The device will not prompt for logins. Instead all transactions will be executed in under a single account (web service application pool).<br>This option is only available for NAV on premise installations. |
| User | The device will prompt for logins. Logins are validated against the IWX User table.<br>In Business Central, you will be prompted for an additional Windows login. All transactions will be executed under the Windows login but the relevant entries will have the User ID fields set to the IWX User used to log in.<br>In NAV on premise, all transactions will be executed in NAV under a single account (the web service application pool) but the relevant entries will have the User ID fields set the username used to log in. |

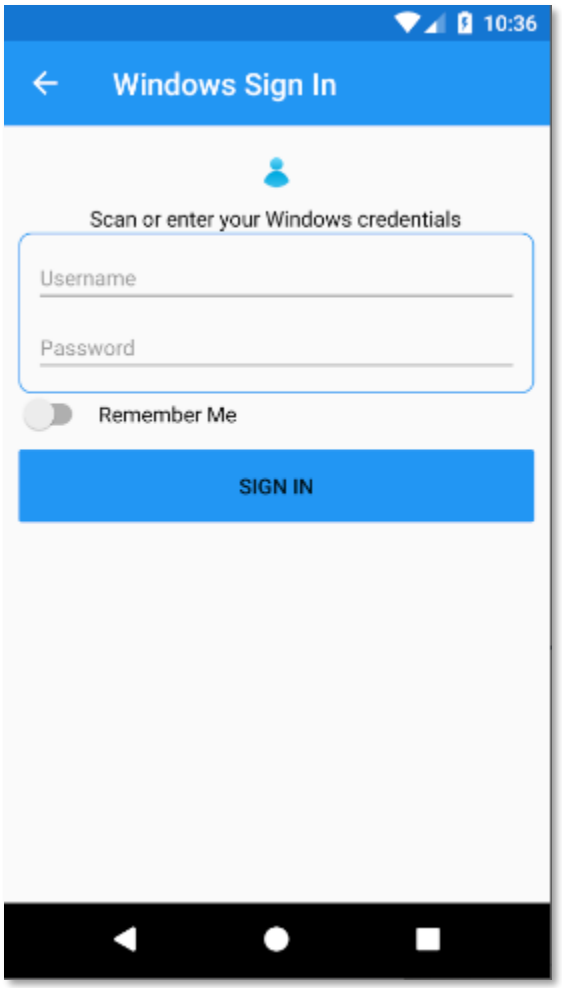
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| | |
|---|---|
| Windows | The handhelds will prompt for logins. Logins are validated against Business Central users (windows authentication) and all transactions will be executed under the users account. |

In addition to the basic authentication process occurring during application start-up, using Logins will also have impacts in various other situations:

- Transaction auditing
  - Using Logins will ensure that any Device Activity Entries are associated to the username used to log in with
  - Document List lookups will be filtered to those that are assigned to the user or are unassigned
  - Opening a document will automatically assign it to the user if the Device Configuration option is set to do so

When using Logins, the device will first prompt the user for their credentials prior to opening the application.




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***Note:*** *Use the "Remember Me" option to bypass the login prompts on future connections. This setting can be toggled for both Windows login prompts and User login prompts.*

#### 3.2.2.1 No Logins

This option only applies to NAV on premise installations.

To configure Warehouse Insight to not use Logins the following steps should be taken:

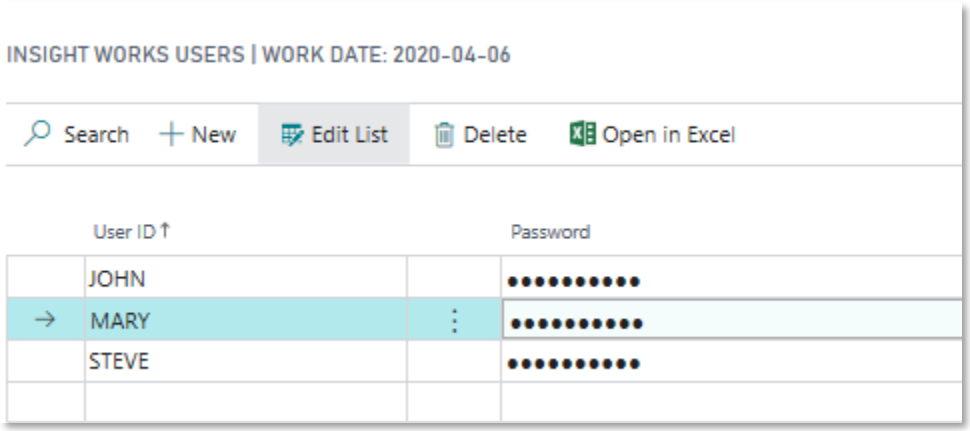
1. Ensure that the Warehouse Insight Application Pool account is set to a valid NAV user with appropriate permissions.
    a. Assigning the 'SUPER' role is usually advisable
    b. If using "Device Licenses" this account should be set to a "Device Only User" in NAV
2. Set the handheld configuration "Login Method" to "None"

All transactions are still executed under the Web Service Application Pool account.

#### 3.2.2.2 User Logins

To configure Warehouse Insight to use User Logins the following steps should be taken:

1. Set the handheld configuration "Login Method" to "User"
2. Create IWX Users in NAV




The IWX Users do not have to be valid Business Central accounts. All transactions are still executed under the Windows account. However, any entries made in Business Central will have the User ID set to the IWX User ID used to log in. Such entries as:

- Value Entries
- Warehouse Entries
- Assigned User ID

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For NAV on premise solutions:

- Ensure that the Warehouse Insight Application Pool account is set to a valid NAV user with appropriate permissions.
  - Assigning the 'SUPER' role is usually advisable
  - If using "Device Licenses" this account should be set to a "Device Only User" in NAV

The IWX Users do not have to be valid NAV accounts. All transactions are still executed under the Web Service Application Pool account. However, any entries made in NAV will have the User ID set to the IWX User ID used to log in. Such entries as:

- Value Entries
- Warehouse Entries
- Assigned User ID

#### *3.2.2.3 Windows Logins*

To configure Warehouse Insight to use Windows logins the following steps should be taken:

1. Set the handheld configuration "Login Method" to "Windows"
2. Create Users in Business Central and generate Web Service Access Keys for each user

For NAV on premise solutions:

- Create Users in NAV
  - Ensure the NAV users have appropriate Permission Sets applied
  - If using "Device Licenses" ensure the users are set to "Device Only User"
- Modify the Web.Config file to indicate Windows Authentication
  - Set "AuthenticationMode" to "2"

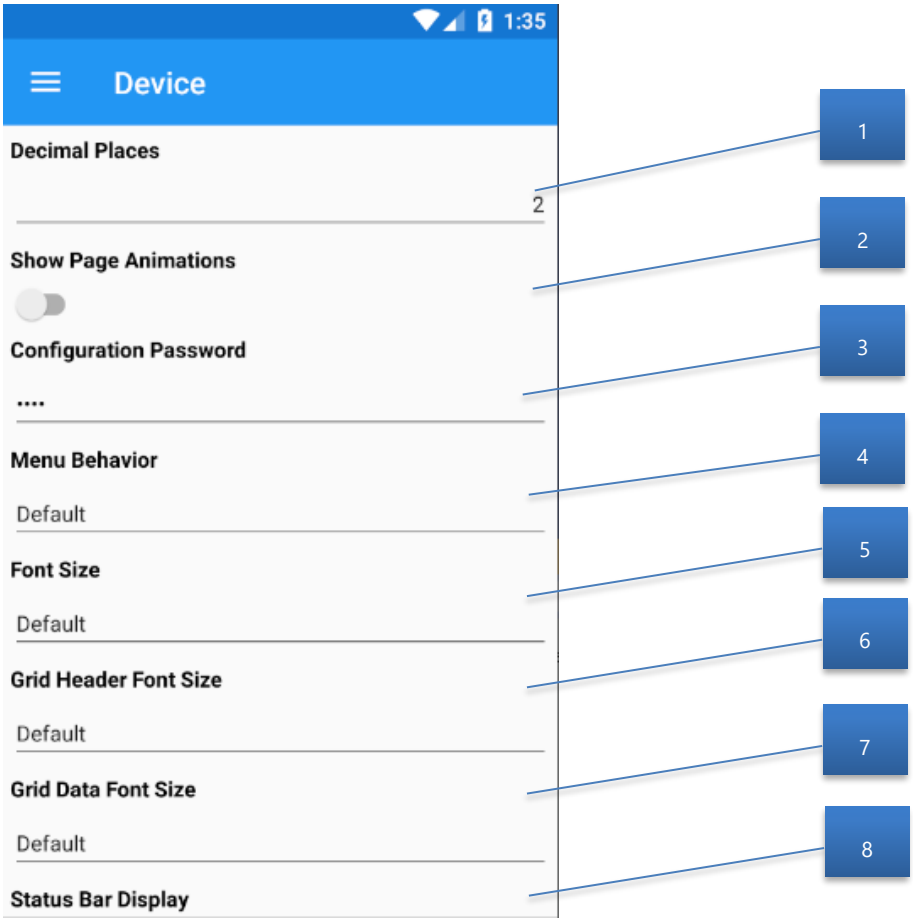
```
<setting name="AuthenticationMode" serializeAs="String">
        <value>2</value>
</setting>
```

All transactions will be processed under the account used to log in with.

### 3.2.3 Device Configuration Page

The Device Configuration page is used to manage miscellaneous optional behaviors on the device.

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| Callout ID | Description |
|---|---|
| 1 | The number of decimal places to show/allow when a decimal field is displayed. Entries will be rounded to the number of decimal places when needed. |
| 2 | Toggle the page transition animation. This will provide a more traditional UI experience when switching pages but may have a performance impact. |
| 3 | The configuration password required to access the configuration pages. Default is 1234. |

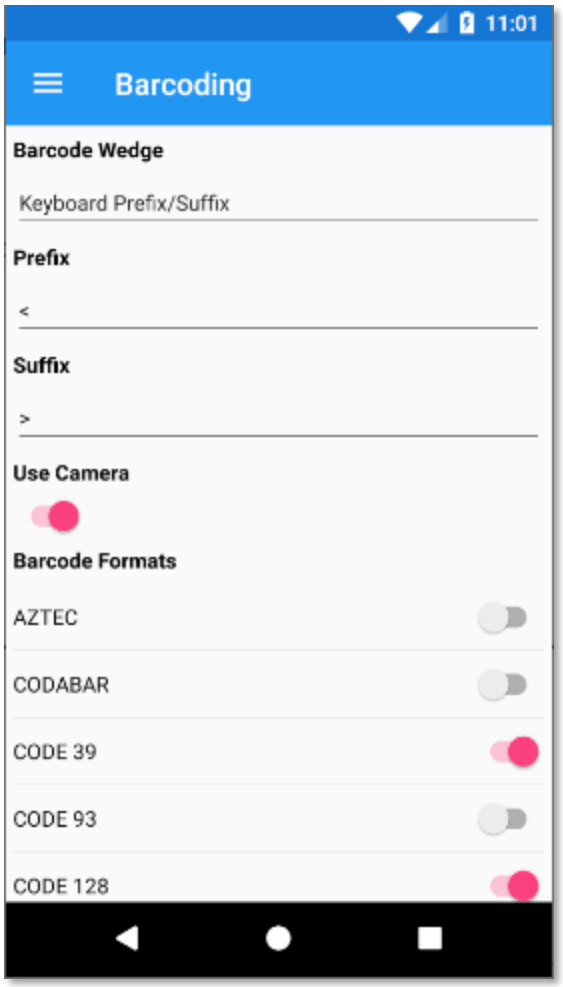
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| | |
|---|---|
| 4 | Controls the menu behavior/visibility. Options are:<br>• Default<br>  ○ Behavior will be whatever the native OS/Device utilizes<br>• Split on Landscape<br>  ○ Menu will always be shown on the side when in landscape mode<br>• Split<br>  ○ Force the menu to always be shown on the side when in landscape or portrait mode<br>• Popover<br>  ○ Prevent the menu from being split and always use the hamburger menu<br>• Split on Portrait<br>  ○ Menu will always be shown on the side when in portrait mode |
| 5 | Specify the default font size to use on the controls/labels |
| 6 | Specify the default font size to use on any grid headers |
| 7 | Specify the default font size to use on any grid rows |
| 8 | Specify what additional information to display in the status bar:<br>• Blank<br>• Company Name<br>• Location Code |

### 3.2.4 Barcoding Configuration Page

The Barcoding Configuration page is used to manage how the device receives barcode scans.

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The barcode wedge options are:

- Android Intent
- Keyboard Prefix/Suffix

---

***Note:*** *Changing the Barcode Wedge settings requires closing and re-opening the application.*

---

#### *3.2.4.1 Android Intent*

Most Android scanners provide a mechanism for signaling barcode scans via “Intents”. The intent strings/keys will be specific to the particular device but should look similar to these:

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### 3.2.4.2 *Keyboard Prefix/Suffix*

The scanner can be configured to require that all scans submit a predefined prefix and suffix prior to submitting the barcode data.

For example, if the barcode data scanned was: "C-100" the device would instead send "<C-100>" to the Warehouse Insight application (presuming the prefix/suffix was "<" and ">" respectively).

The prefix/suffix will be set on the device (exact location/method of doing so dependent on the device). Once done, the same prefix/suffix will be set on the configuration page. The software will listen/look for these special tags and when received know how to correctly interpret/recognize the scan.

This option should be used if your device does not support Scanning Intents.

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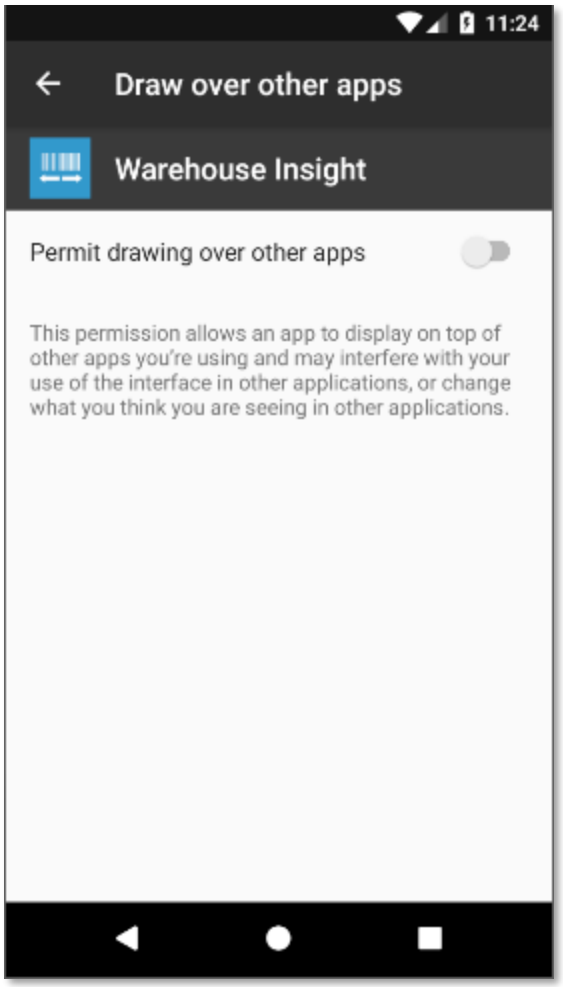



### 3.2.4.3 *Using the Camera Scanner*

You can also use the devices Camera to scan barcodes by enabling the "Use Camera" option. When toggled on you will prompted to enable the "Draw over other apps" permission.

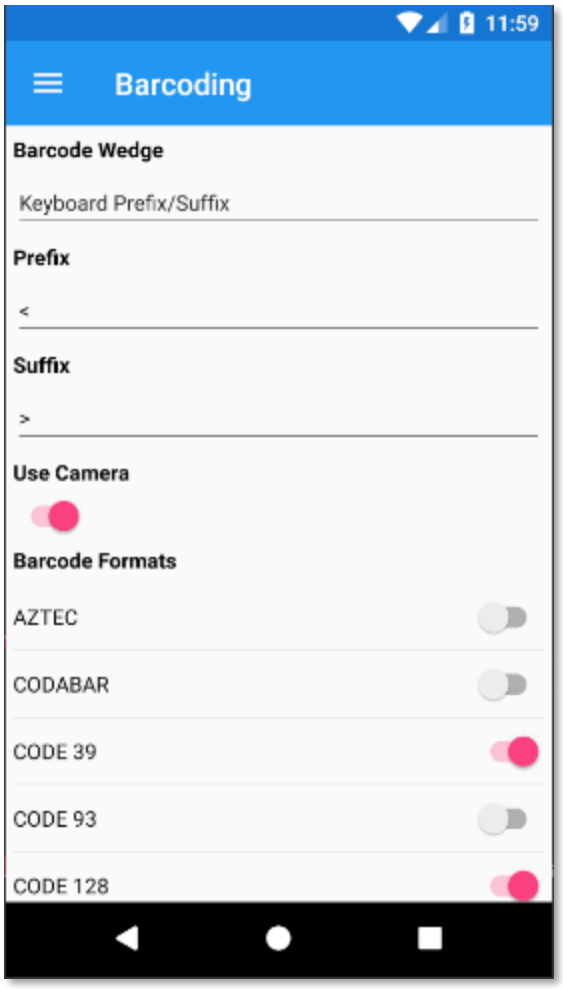
Find the Warehouse Insight application in the list shown and enable the required permission.

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Once enabled you can toggle barcode symbologies required.  Reducing the amount of enabled symbologies will make the camera scanning more reliable and potentially faster.

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When activated the “Camera Scanning” button will appear over most pages and look like this:



Users can move the button around as needed and the last position will be remembered.

### 3.2.5 Logging Configuration Page

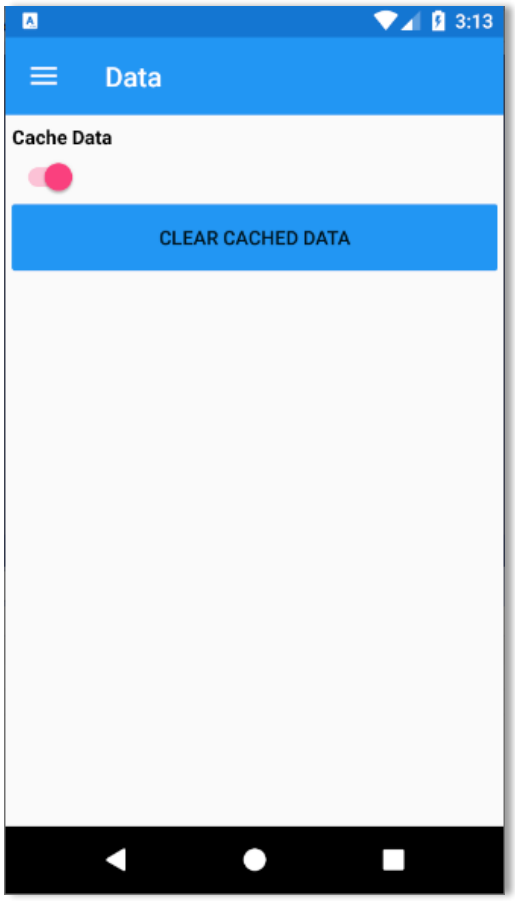
The Logging Configuration page is used to change the logging level, clear and copy the current log file.

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### 3.2.6 Data Configuration Page

The Data Configuration page is used to configure whether Business Central data should be cached on the device as it pertains to Item and Bin scanning.




The following table indicates what data is cached and frequencies.

| Table | Frequency |
|---|---|
| IWX Barcode Rule | When the application is launched |
| Bin | When the application is launched |
| Item Cross Reference | When the application is launched |
| Item Ledger Entry | Every 5 minutes |
| Item | When the application is launched |
| Item Unit of Measure | When the application is launched |

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## 3.3 Regionalization

Warehouse Insight supports multiple language options both from Business Central and the handhelds. The following languages are currently supported:

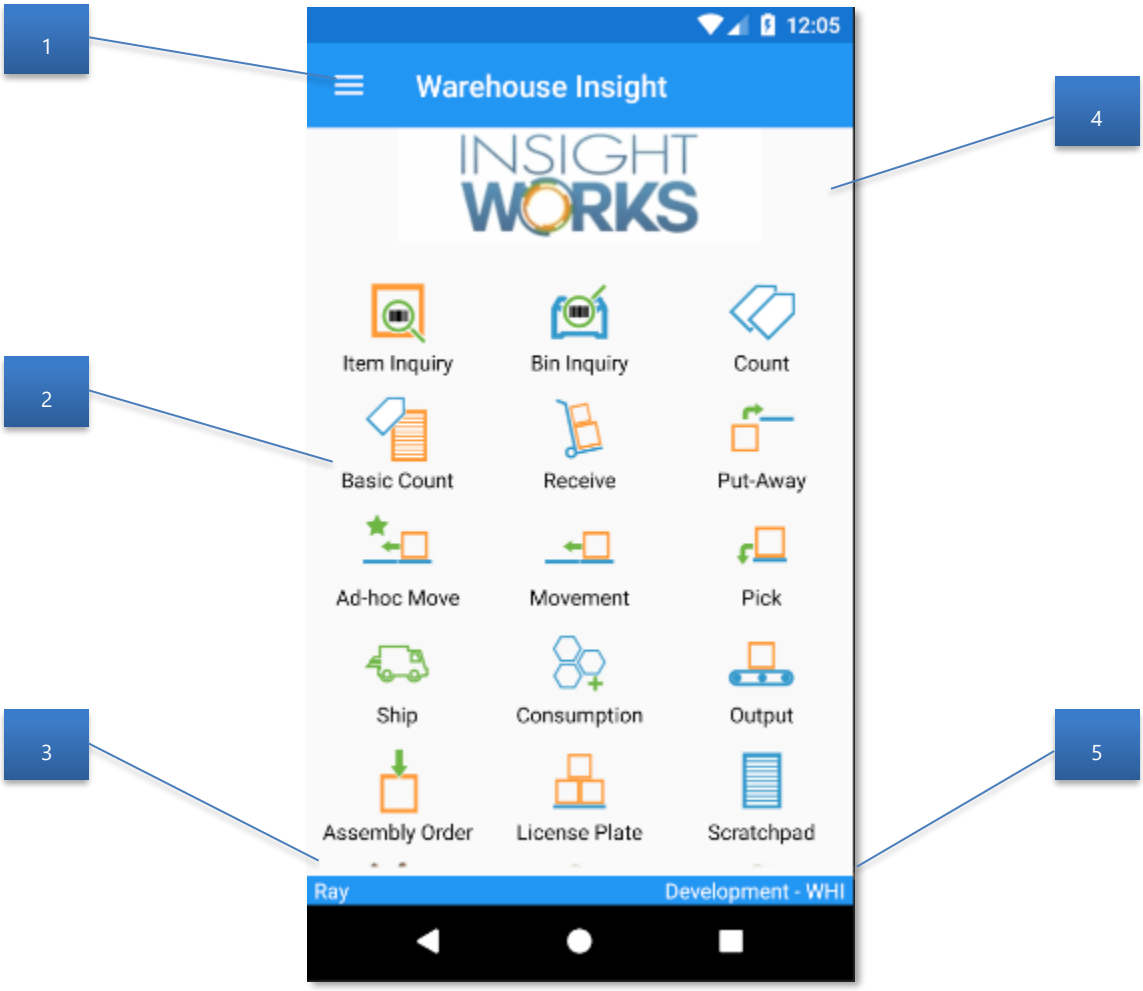
- English (Canada)
- English (United States)
- Spanish (Mexico)
- French (Canada)

In order to utilize the Warehouse Insight in alternate languages you will need to configure the devices regional setting to be the language desired.

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# 4 Main Landing Page

The initial interface is broken into several applications. The typical default installation will look like this:




| Callout ID | Description |
|---|---|
| 1 | The main landing page menu options. |
| 2 | The Applications available for execution |
| 3 | The currently logged in user name (if applicable) |
| 4 | The Device Logo (if applicable). This can be changed via the Device Configuration card in Business Central. |
| 5 | The company name or location code |

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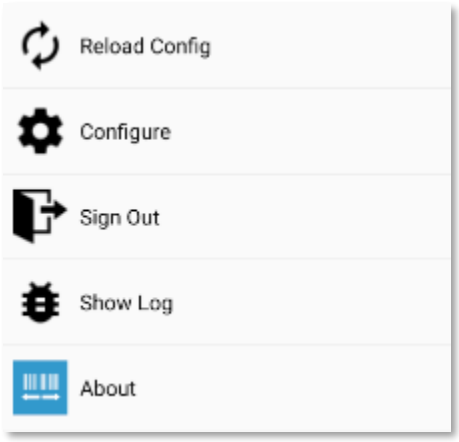
Each of the Applications when clicked on will launch the appropriate module and are covered in subsequent sections.

***Customization:*** *The application choices can be configured via the Device Menus page in Business Central. Application choices may be modified, hidden, re-ordered and even new 'custom' options created as needed.*

## 4.1 Landing Page Menu Options

The landing page menu options consist of the following:

- Reload Config
- Configure
- Sign Out
- Show Log
- About




Unlike other applications within Warehouse Insight these menu options are static and cannot be changed.

### 4.1.1 Reload Config (Menu)

Use the "Reload Config" menu option to update any cached settings like: Device Configuration changes, Application changes, menu changes.

***Note:*** *The option can also be used to "Log Out" if logins have been enabled and the "Remember Me" option is not set.*

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### 4.1.2 Configure (Menu)

Use the "Configure" menu option to make configuration changes specific to the software installation. See "Software Configuration" for more details.

### 4.1.3 Sign Out

The "Sign Out" menu will log the current user out and present the Login Page.

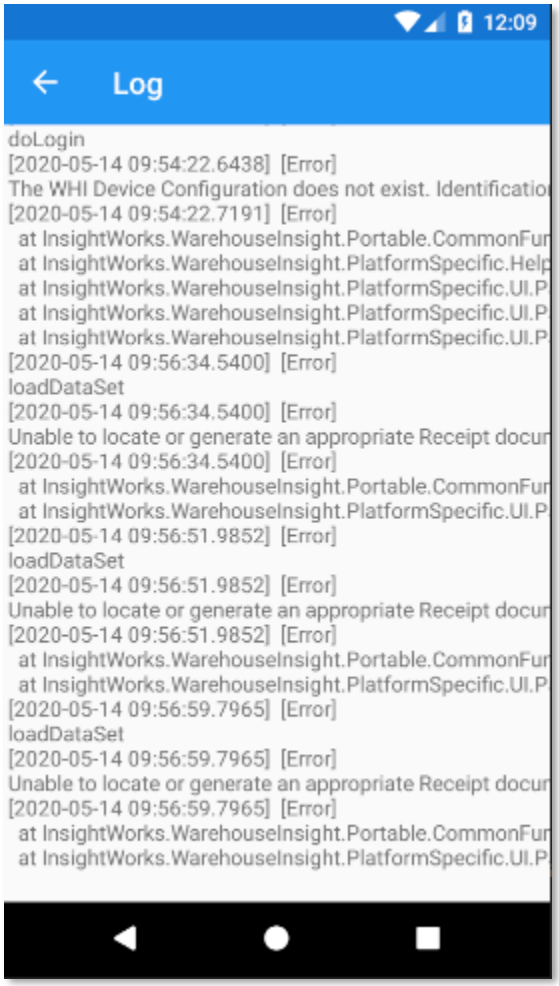
---

***Note:*** *If User Logins are being used only the User Login will be logged out. The Windows User will remain active.*

---

### 4.1.4 Show Log (Menu)

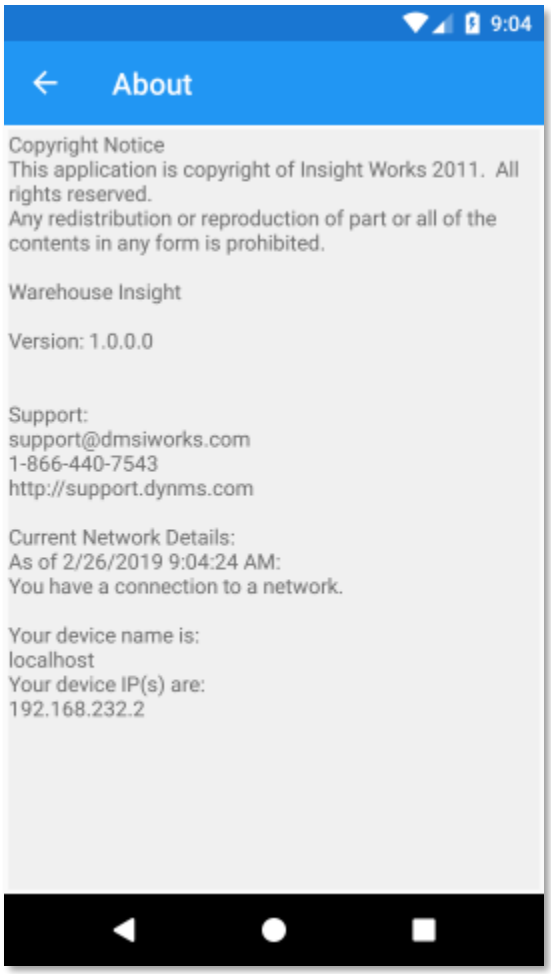
The "Show Log" menu option can be used to view any log statements generated.




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### 4.1.5 About (Menu)

The “About” menu option displays information concerning network connectivity and application versioning.



# 5 Item Inquiry

The “Item Inquiry” application provides information about Items the system.

Core features of this application include:

- General Item Information
    - Quantity on hand
    - Locations/Quantity per bin
    - Transaction History
- Printing labels

You can access the Item Inquiry application from the Home screen by clicking the “Item Inquiry” link.

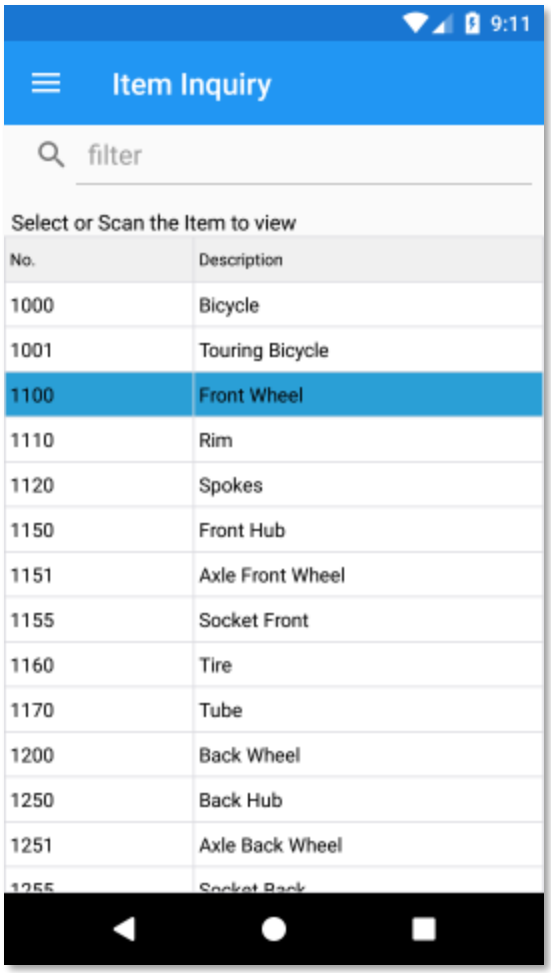



When launched the Item Lookup List page will be displayed.

## 5.1 Item Inquiry Lookup List

The Lookup List page allows you to either scan or select the Item you wish to view.

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***Configuration:*** *The maximum number of items that appear in this list is configured in the Warehouse Insight Setup page in Business Central via the "Document Max List" property (defaults initially to 100).*

Use the filter bar to filter the lookup list to specific Items if required.

If a barcode is scanned the Barcode Rules will be executed as normal to decode the barcode and if the barcode returns a lot or serial number, then the Item information will be initially filtered to that specific lot or serial.

### 5.1.1 Item Inquiry Lookup List Columns

The Item Inquiry Lookup List can show the following columns.

| Column | Description |
|---|---|
| No. | The Item "No." |

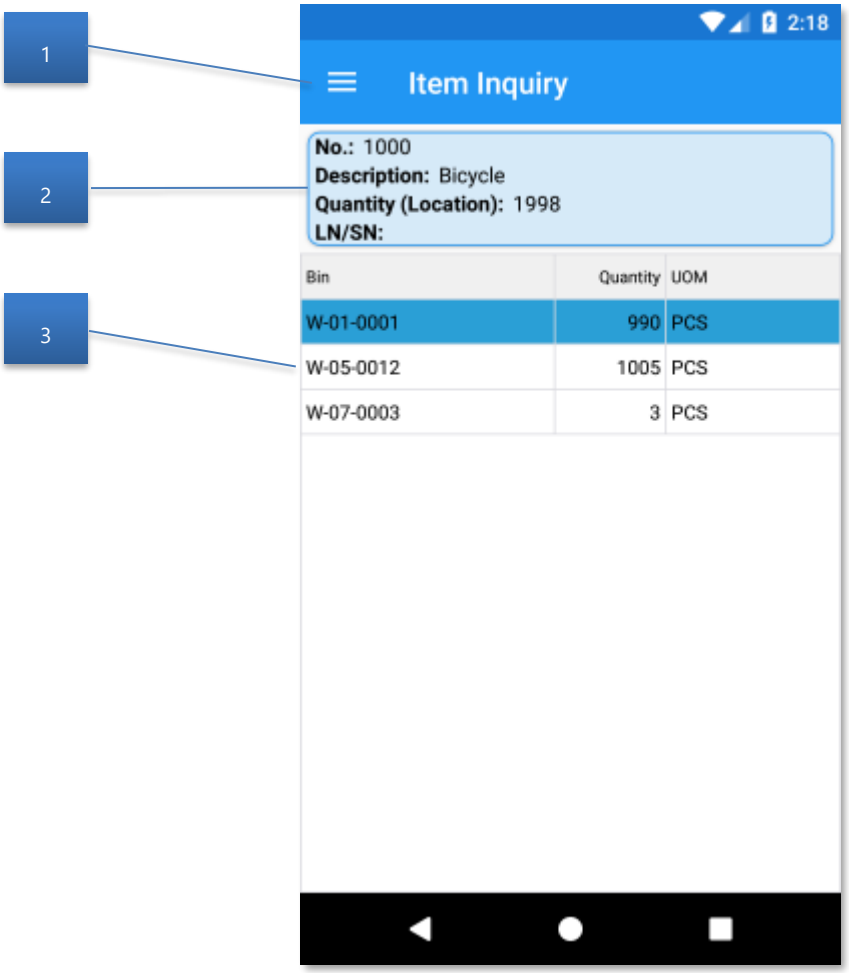
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| | |
|---|---|
| Description | The Items “Description” |
| Description 2 | The Items “Description 2” |

***Extensibility:*** *You may add additional columns by configuring the Device Columns for event “INV INQ::GetItemList” (ID: 10013).*

## 5.2 Item Management

When you scan or enter an Item in the “Lookup List” you will be shown the Item details page.




| Callout ID | Description |
|---|---|
| 1 | The available menu options: |

| | |
|---|---|
| | • Close<br>• Recent Transactions<br>• Show Picture<br>• Print<br>• Select Serial/Lot |
| 2 | Item details |
| 3 | Bin contents for the Item |

You can also switch Items by scanning a different Item barcode from this screen as well without needing to exit back to the Lookup List page.

***Note:*** *If a Lot or Serial number has been selected the Quantity on Location will be filtered based on the selection.*

## 5.2.1 Bin Contents

The Bin Contents displays all the Bins that the Item is currently located in. This information is driven from the Bin Contents but any lines with a quantity of zero have been filtered out.

***Extensibility:*** *The Bin Contents are not broken down by Lot or Serial number and do not consider the currently selected lot or serial number. To achieve this result you will need to override the event "ITEM INQ::GetItemDetails" (ID: 10014) to implement the required logic.*

### *5.2.1.1 Item Inquiry Bin Contents Columns*

The Bin Contents can show the following columns.

| Column | Description |
|---|---|
| Bin | The Bin the Item is currently in |
| Qty | The Quantity of that item in the bin |
| Pick Qty. | The Quantity currently on Pick documents |
| Put-away Qty. | The Quantity currently on Put-away documents |
| Available Qty. to Take | The Quantity that can currently be taken |

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| | |
|---|---|
| Unit of Measure Code | The Unit of Measure for the Bin Content entry |

***Extensibility:*** *You may add additional columns by configuring the Device Columns for event "INV INQ::GetItemDetails" (ID: 10014).*

## 5.2.2 Item Inquiry Menus

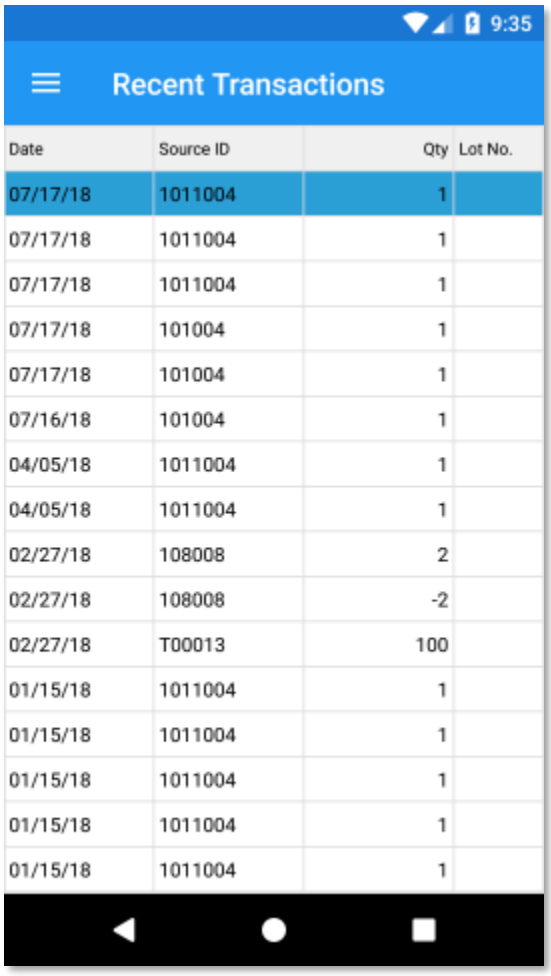
The following menus are available when viewing an Item. Menus may be added or removed as required from the Device Menus page under the "ITEM_INQ_DOC" Application.

### *5.2.2.1 Close (Menu)*

This will close the screen and bring the user back to the Lookup List screen.

### *5.2.2.2 Recent Transactions (Menu)*

The Recent Transactions page provides a brief summary of the most recent activity for the Item.




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You may control the number of transactions shown by setting “Item Inquiry Max. Transactions” in the Warehouse Insight Setup page.

***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event “INQ::GetItemTransactions” (ID: 10015).*

#### 5.2.2.3 *Show Picture (Menu)*

If you have specified a picture for the Item (Item Card -> Picture) it will be displayed when the Show Picture menu is pressed.




***Note:*** *You can have the picture display each time an Item is scanned when processing documents by enabling the “Display Item Picture” option on the Device Configuration card.*

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#### 5.2.2.4 *Print (Menu)*

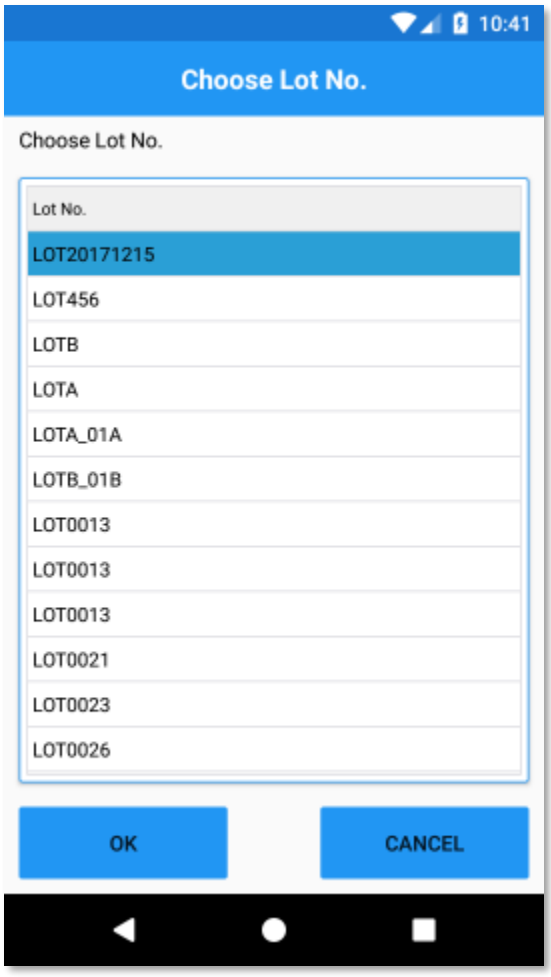
When you press the menu “Print” a request will be sent to Business Central to print an Item label. You can configure which label report is run in the IWX Report Selections with the “Item Label” usage.

The software provides a sample report that can be used as a reference for printing Item Labels (report “WMDM Item Barcode Label”, ID: 23044511). If designing your own label report, it may be worth reviewing the internal structure of this report as it is designed to work in a variety of printing scenarios (Business Central, Item Inquiry, Receiving and Output).

If a Lot or Serial number has been selected this will also be passed to the label report for inclusion.

#### 5.2.2.5 *Choose LN/SN (Menu)*

When the menu “Choose LN/SN” is pressed a list of in stock lot/serial numbers for the handheld location will be shown.




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Selecting a Serial/Lot number and pressing "OK" will cause the Item Inquiry screen to refresh with your selection.  This can be useful for re-printing labels for specific lot/serial numbers or viewing lot/serial information when you don't have the item label currently available for scanning.



***Extensibility:*** *The columns are not currently configurable.  Any changes to this view will require overrides or adjustments to the ITEM_INQ_DOC application.*

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# 6 Bin Inquiry

The “Bin Inquiry” application provides information about Bins the system.

Core features of this application include:

- General Bin information
- Items contained in the Bin
    - Quantity
    - Lot/Serial Numbers
    - Descriptions
- License Plates contained in the Bin
- Recent Bin transactions
- Printing labels

You can access the Bin Inquiry application from the Home screen by clicking the “Bin Inquiry” link.

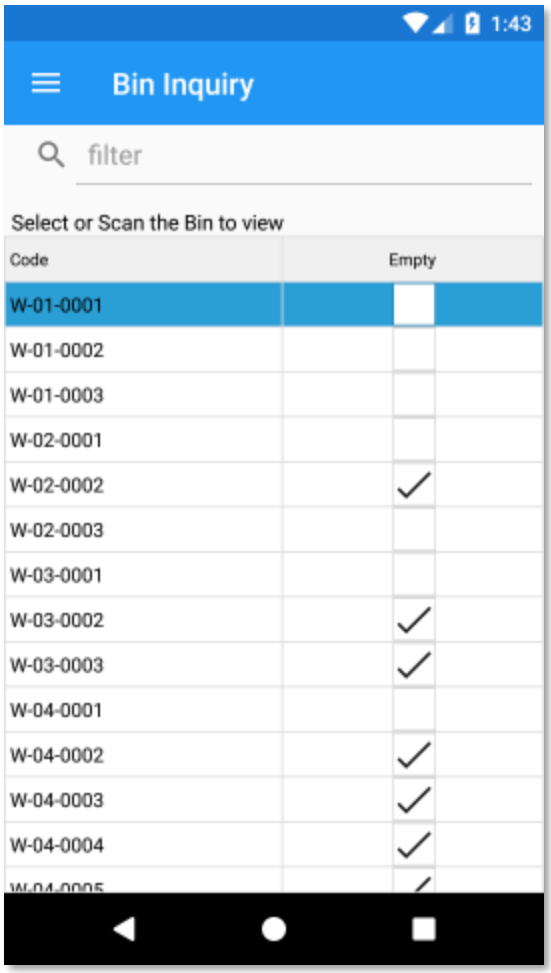



When launched the Bin Lookup List page will be displayed.

## 6.1 Bin Inquiry Lookup List

The Lookup List page allows you to either scan or select the Bin you wish to view.

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***Configuration:*** *The maximum number of Bins that appear in this list is configured in the Warehouse Insight Setup page in Business Central via the "Document Max List" property (defaults initially to 100).*

Use the filter bar to filter the lookup list to specific Bins if required.

### 6.1.1 Bin Inquiry Lookup List Columns

The Bin Inquiry Lookup List can show the following columns.

| Column | Description |
|---|---|
| Code | The Bin "Code" |
| Empty | The Bins "Empty" flag |
| Description | The Bins "Description" |
| Zone Code | The Bins "Zone Code" |

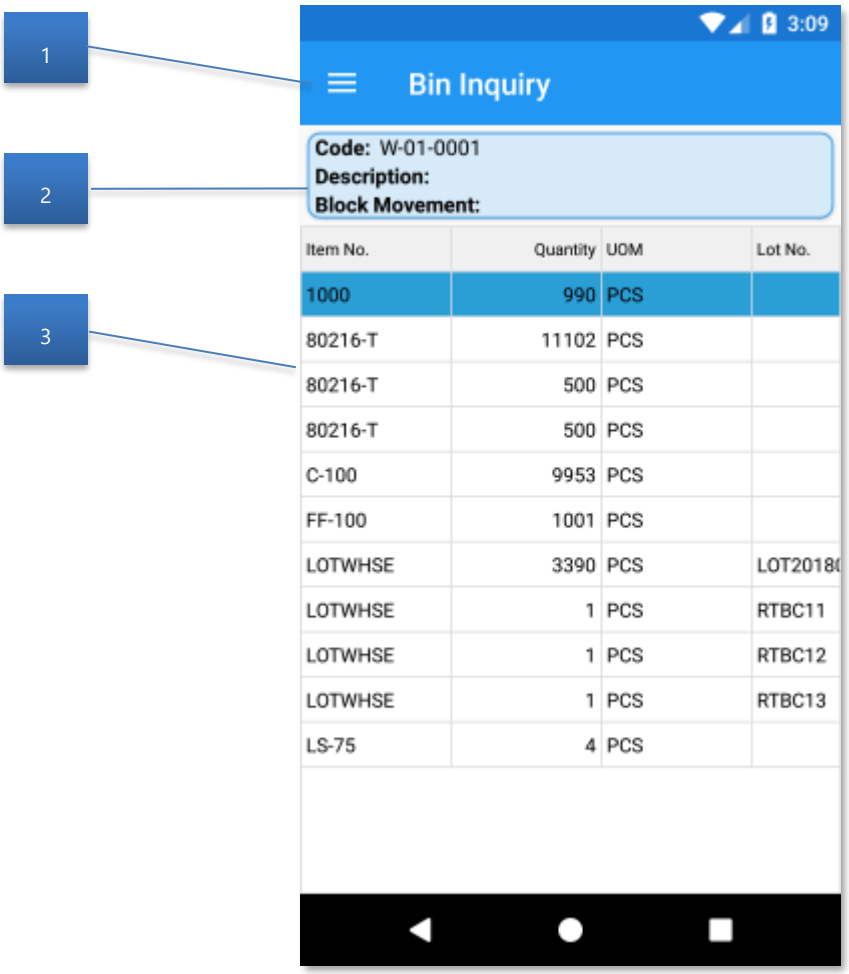
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| | |
|---|---|
| Dedicated | The Bins “Dedicated” flag |

***Extensibility:*** *You may add additional columns by configuring the Device Columns for event “INV INQ::GetBinList” (ID: 10020).*

## 6.2 Bin Management

When you scan or enter a Bin in the “Lookup List” you will be shown the Bin details page.




| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close |

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| | |
|---|---|
| | • Whse. Entries<br>• Print<br>• License Plates |
| 2 | Bin details |
| 3 | Bin contents for the Bin |

You can also switch Bins by scanning a different Bin barcode from this screen as well without needing to exit back to the Lookup List page.

 ***Note:*** *If a Lot or Serial number has been selected the Quantity on Location will be filtered based on the selection.*

## 6.2.1 Bin Contents

The Bin Contents displays all the Items that are in the Bin. This information is driven from the Bin Contents but any lines with a quantity of zero have been filtered out.

***Configuration:*** *The Bin Contents can be broken down by lot/serial number by setting the "Bin Contents Inquiry Mode" to "Group by Lot" in the "Device Configuration" page in Business Central.*

### *6.2.1.1 Bin Inquiry Bin Contents Columns*

The Bin Contents can show the following columns.

| Column | Description |
|---|---|
| Item No. | The Item number entry |
| Variant | The Variant Code for the entry |
| Quantity | The Quantity of that item in the bin |
| UOM | The Unit of Measure for the Bin Content entry |
| Description | The Item "Description" |
| Description 2 | The Item "Description 2" |
| Lot No. | The Lot No. of the Bin Content entry (if grouping by lot) |
| Serial No. | The Serial No. of the Bin Content entry (if grouping by lot) |

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***Extensibility:*** *You may add additional columns by configuring the Device Columns for event "INV INQ::GetBinDetails" (ID: 10021) when not grouping by lot/serial number.*

## 6.2.2 Bin Inquiry Menus

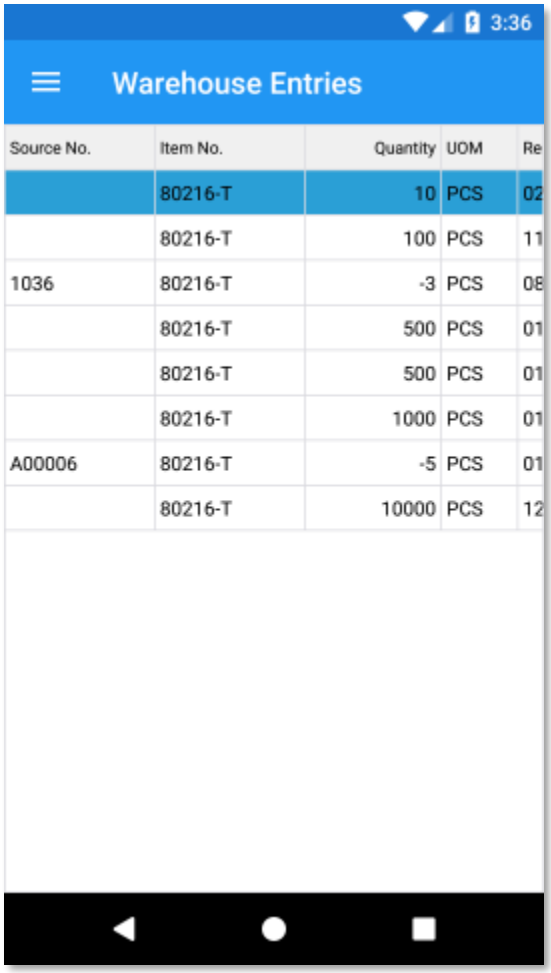
The following menus are available when viewing a Bin. Menus may be added or removed as required from the Device Menus page under the "BIN_INQ_DOC" Application.

### *6.2.2.1 Close (Menu)*

This will close the screen and bring the user back to the Lookup List screen.

### *6.2.2.2 Whse. Entries (Menu)*

The Warehouse Entries page provides a brief summary of the most recent activity for the Bin. The entries are filtered based on the selected Bin Content record selected.




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You may control the number of transactions shown by setting “Item Inquiry Max. Transactions” in the Warehouse Insight Setup page.

***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event “INQ::GetWhseEntries” (ID: 10005).*

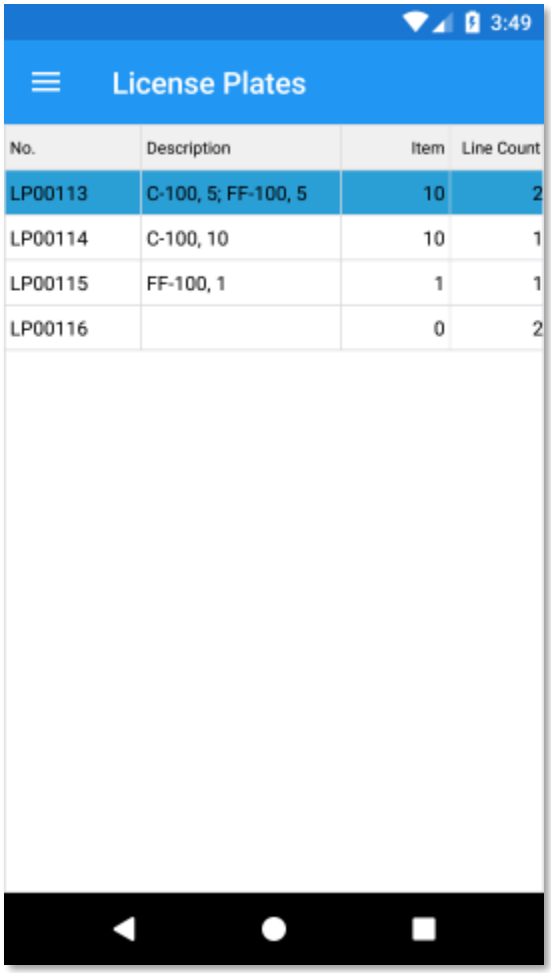
#### 6.2.2.3 *Print (Menu)*

When you press the menu “Print” a request will be sent to Business Central to print a Bin label. You can configure which label report is run in the IWX Report Selections with the “Bin Label” usage.

The software provides a sample report that can be used as a reference for printing Bin Labels (report “WMDM Bin Label”, ID: 23044513).

#### 6.2.2.4 *License Plates (Menu)*

The License Plates page lists the License Plates that are currently in the Bin.




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You may view the License Plate in more detail by selecting a License Plate and pressing the “Show License Plate” menu.

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# 7 Advanced Inventory Count

The "Count" application is used to perform inventory counts. The application acts as an interface for the "Advanced Inventory Count" product and is an optional purchase. If you have not purchased the product you may instead use the "Basic Count" application.

Core features of this application include:

- Manual Counting
- Cycle Counting
- Multiple Count Sheets/Teams

You can access the Advanced Inventory Count application from the Home screen by clicking the "Count" link.




When launched the Count Lookup List page will be displayed.

---

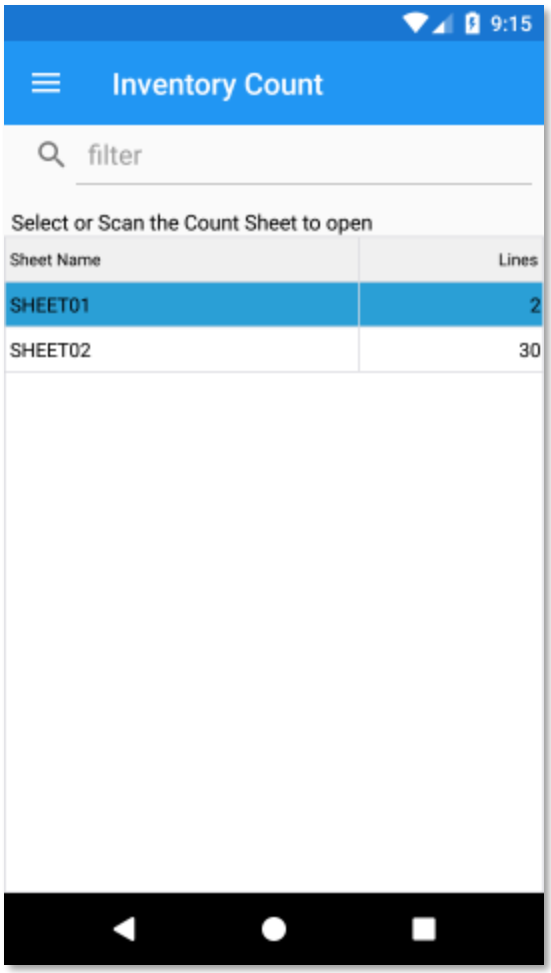
***Note:*** *For more information on configuring and using the Advanced Inventory Count product consult the product documentation.*

---

## 7.1 Advanced Inventory Count Lookup List

The Lookup List page allows you to either scan or select the Sheet you wish to view.

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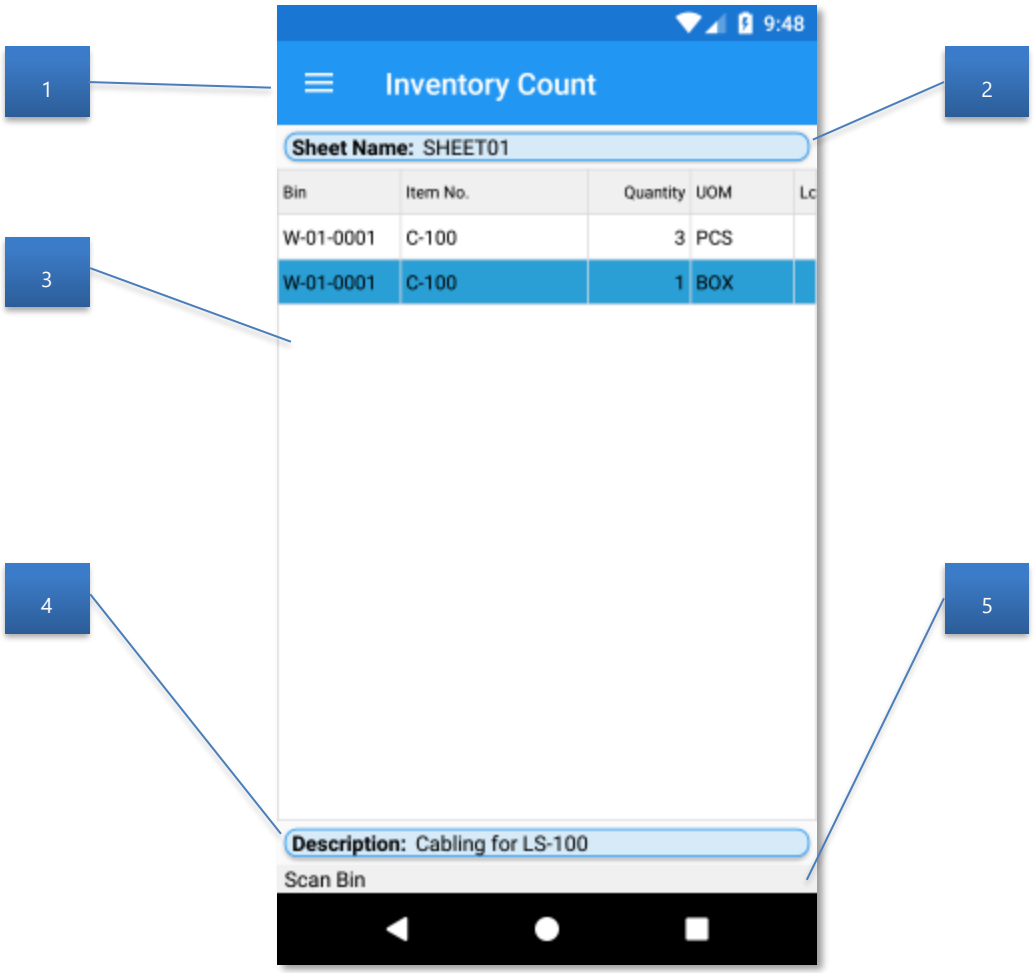

Only active Count Sheets for the device location will be shown.

Use the filter bar to filter the lookup list to specific Sheets if required.

## 7.2 Count Sheet

When you select a Count Sheet to open a screen similar to this will be shown:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Delete Line<br>• Change Qty<br>• Enter Bin<br>• Enter Item<br>• Enter License Plate<br>• Comments<br>• Item Inquiry<br>• Bin Inquiry |
| 2 | The Sheet Name |
| 3 | The Count Lines on the current Sheet |
| 4 | The selected line Item Description |
| 5 | Status bar indicating status messages or instructions |

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***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event "ADVCOUNT::GetLines" (ID: 30009).*

### 7.2.1 Counting Items

The standard process flow should be used when counting Items:

1. Scan the Bin to Count in
2. Scan the Item to Count
3. Enter the Quantity counted and Item Tracking Information (if required)

See General Document Handling for more information.

If the Sheet already contains the counted Item, the line will be updated. If the entry does not already exist a new line will be added to the Sheet instead. If the line already exists but the User chooses a different Unit of Measure, they will be prompted whether a new line should be created or the existing one update.

If your location does not require Bins you may also scan shelf numbers via the Tag barcode.

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure to count in.

### 7.2.2 Menus

The following menus are available by default for Advanced Inventory Count. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "ADVCOUNT_DOC" for the Application.

#### *7.2.2.1 Close (Menu)*

Closes the Count Sheet and brings the user back to the Lookup List page.

#### *7.2.2.2 Delete Line (Menu)*

Deletes the currently selected Count Sheet line.

#### *7.2.2.3 Change Quantity (Menu)*

Launches the Quantity dialog for the selected line.

#### *7.2.2.4 Enter Bin (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Bin that they wish to simulate scanning.

This option can be useful if Bin labels have become damaged or are inaccessible.

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***Note:*** *It is usually more advisable to open the Bin Inquiry module (see menu options) and reprint the label.*

#### *7.2.2.5 Enter Item (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Item that they wish to simulate scanning.

This option can be useful if Item labels have become damaged or are no longer readable.

***Note:*** *It might be more advisable to open the Item Inquiry module (see menu options) and reprint the item label depending on downstream process requirements (e.g. further scanning or item handling may be required).*

#### *7.2.2.6 Enter License Plate (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

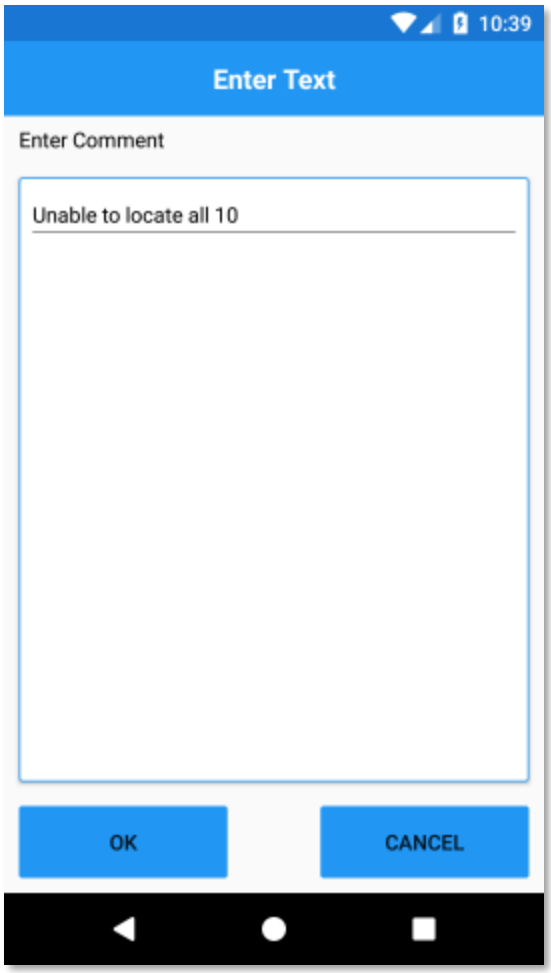
Users will be prompted to type in the License Plate number they wish to simulate scanning.

***Note:*** *License Plate labels can be reprinted via the License Plate module on the handhelds but will require exiting the application.*

#### *7.2.2.7 Comments (Menu)*

Allows users to set/view the selected lines comments.

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#### *7.2.2.8 Item Inquiry (Menu)*

Launches the Item Inquiry management screen pre-filtered to the selected line.

#### *7.2.2.9 Bin Inquiry (Menu)*

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

## 7.3 Common Configurations and Requests

This section is intended to describe the most common scenarios, requests and features concerning Inventory. While some topics may require development or customizations, they are included here in order to provide a greater understanding of what the software is capable of.

Further information may be obtained from Support Portal.

### 7.3.1 Forcing Each Scan to a New Line

By default, the Count application will attempt to match on existing lines and if found update them. However, if it is easier or better that each subsequent scan instead creates

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new lines it may be done by setting the “Inventory Scan Item Behavior” to “Always Add New Line” on the Device Configuration card.

### 7.3.2 Clearing Bins Between Scans

By default, the Count application will not clear the current/active Bin between scans. This allows users to quickly scan multiple items in the same Bin without having to rescan it. However, this does potentially introduce risk if the users forget to scan the new Bin when moving to the next Bin to count. If desired, the current/active Bin can be cleared after each item scan by setting the “Clear Bin on Inventory Count” option to true on the Device Configuration card.

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# 8 Basic Count

The "Basic Count" application can be used to perform inventory counts, when the Advanced Inventory Count application has not been purchased. The Basic Count primarily acts an interface around the Physical Inventory Journal. If the Advanced Inventory Count application has been purchased it should be used instead of the Basic Count.

Core features of this application include:

- Manual Counting
- Cycle Counting

---

***Note:*** *Basic Count does not support Lot/Serial number tracking.*

---

You can access the Basic Count application from the Home screen by clicking the "Basic Count" link.




When launched the Basic Count Lookup List page will be displayed.

---

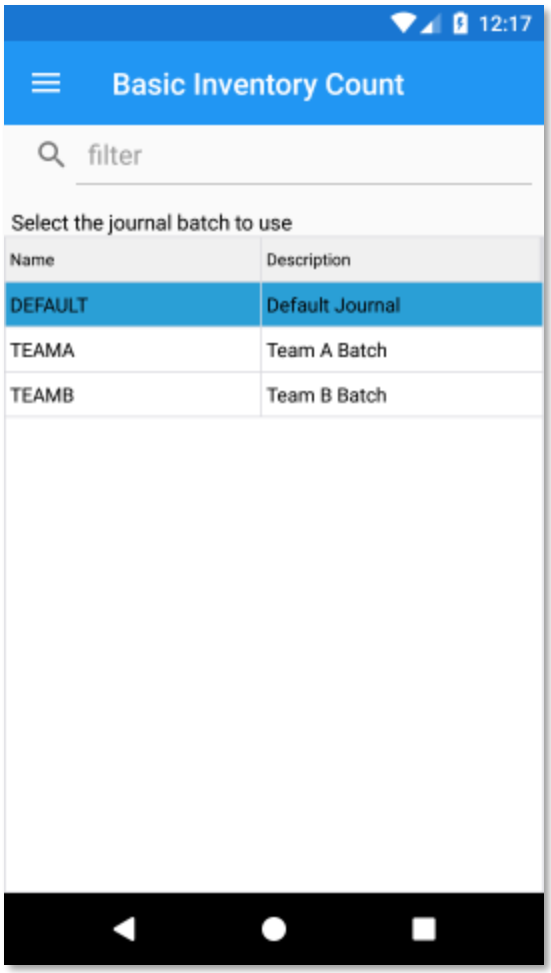
***Note:*** *If you have purchased the Advanced Inventory Count application then the Basic Count menu can be hidden via the Device Menus page.*

---

## 8.1 Basic Count Lookup List

The Lookup List page allows you to select the Physical Inventory Batch you wish to view.

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Only Physical Inventory journal batches will be displayed.

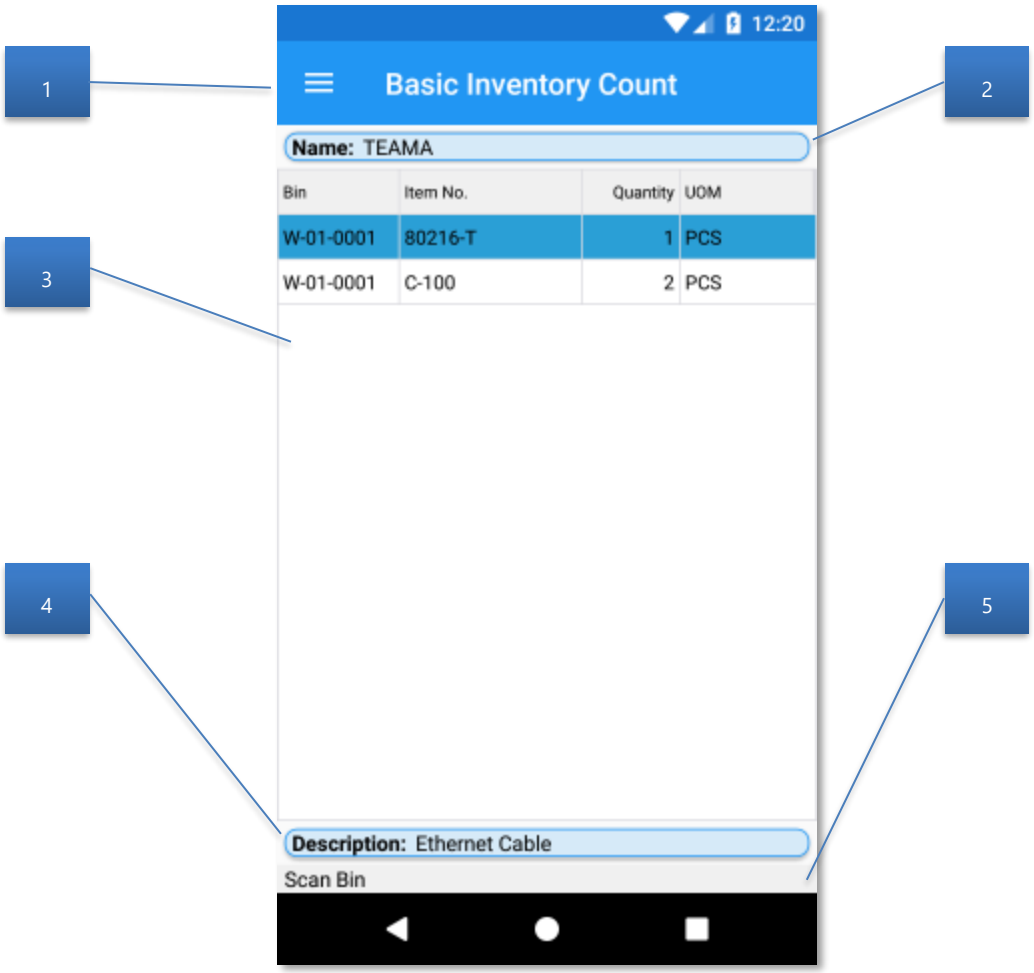
Use the filter bar to filter the lookup list to specific Batches if required.

***Note:*** *The Journal Batches must have a "Posting No. Series" defined and the "Default No. Series" must be blank.*

## 8.2 Basic Count Batch

When you select a Basic Count Batch to open a screen similar to this will be shown:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Delete Line<br>• Change Qty<br>• Enter Bin<br>• Enter Item<br>• Item Inquiry<br>• Bin Inquiry |
| 2 | The Batch Name |
| 3 | The Journal Lines on the current Batch |
| 4 | The selected line Item Description |
| 5 | Status bar indicating status messages or instructions |

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***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event "BASICCOUNT::GetBatch" (ID: 97001).*

### 8.2.1 Counting Items

The standard process flow should be used when counting items:

1. Scan the Bin to Count in
2. Scan the Item to Count
3. Enter the Quantity counted

See General Document Handling for more information.

***Note:*** *Basic Count does not support Lot/Serial number tracking.*

If the Batch already contains the counted Item, the line will be updated. If the entry does not already exist a new line will be added to the Batch instead.

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure to count in.

### 8.2.2 Menus

The following menus are available by default for Basic Count. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "BASICCOUNT_DOC" for the Application.

#### *8.2.2.1 Close (Menu)*

Closes the Count Batch and brings the user back to the Lookup List page.

#### *8.2.2.2 Delete Line (Menu)*

Deletes the currently selected Journal line.

#### *8.2.2.3 Change Quantity (Menu)*

Launches the Quantity dialog for the selected line.

#### *8.2.2.4 Enter Bin (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Bin that they wish to simulate scanning.

This option can be useful if Bin labels have become damaged or are inaccessible.

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***Note:*** *It is usually more advisable to open the Bin Inquiry module (see menu options) and reprint the label.*

#### *8.2.2.5 Enter Item (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Item that they wish to simulate scanning.

This option can be useful if Item labels have become damaged or are no longer readable.

***Note:*** *It might be more advisable to open the Item Inquiry module (see menu options) and reprint the item label depending on downstream process requirements (e.g. further scanning or item handling may be required).*

#### *8.2.2.6 Item Inquiry (Menu)*

Launches the Item Inquiry management screen pre-filtered to the selected line.

#### *8.2.2.7 Bin Inquiry (Menu)*

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

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# 9 Receiving

The “Receive” application is responsible for handling inbound transactions.  Supported inbound transactions are:

- Purchase Orders
- Transfer Orders
- Warehouse Receipts

Core features of this application include:

- Lookup Lists for Inbound Transactions
- Auto creation of Warehouse Receipts if required
- Specifying Quantity to Receive
    - Including Item Tracking information
- Posting

You can access the Receiving application from the Home screen by clicking the “Receive” link.




When launched the Receiving Lookup List page will be displayed.

---

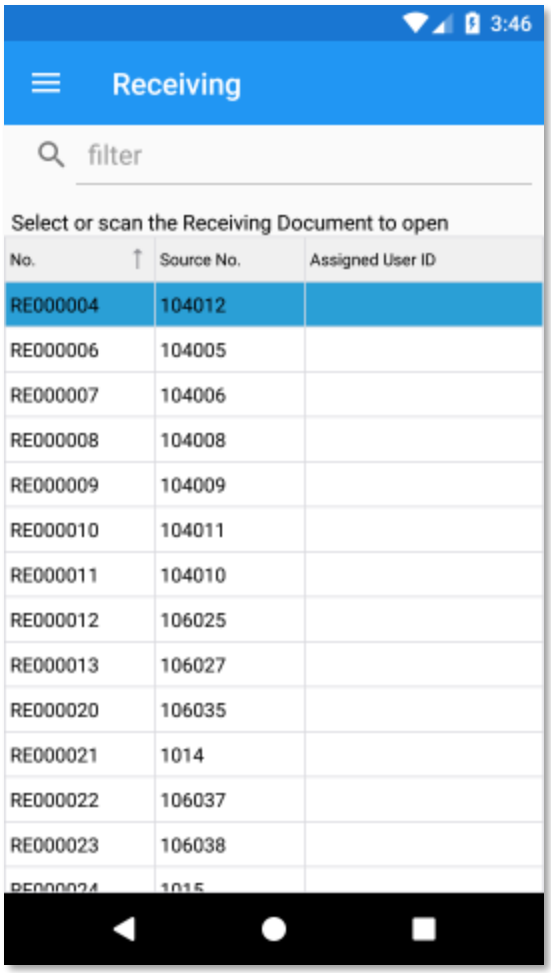
***Note:*** *This document will describe processes specific to Warehouse Receipts. Purchase/Transfer Order handling is almost identical and has been left out.  For specific differences or questions please contact support.*

---

## 9.1 Receiving Lookup List

The Lookup List page allows you to either scan or select the Receiving Document you wish to view.

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***Configuration:*** *The maximum number of Documents that appear in this list is configured in the Warehouse Insight Setup page in Business Central via the "Document Max List" property (defaults initially to 100).*

Use the filter bar to filter the lookup list to specific Documents if required.

The Receiving Lookup List can be filtered by typing into the Search Filter. The following data is supported for searching:

- Document Number
  - Receiving Documents that have a No. matching the filter will be displayed
- Vendor Shipment No.
  - Documents that have a Vendor Shipment No. matching the filter will be displayed
- Source No.
  - Any Warehouse Receipts that have a "Source No." (Purchase Order, Transfer Order) on the lines that match the filter will be displayed

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By default, only "Released" receiving documents are shown. However, you may toggle this to show "Open" documents as well by setting the "Only Show Released Receipts" option to "No" in the Device Configuration page.

If you have Logins enabled only documents that are un-assigned or explicitly assigned to the logged in user will be shown. If you wish to see all documents regardless of assignment the "Show All Documents" option must be checked on the Device Configuration page.

The following table indicates the effect of scanning various barcodes.

| Barcode | Effect |
|---|---|
| Purchase Order | The Purchase Order application will be shown. If your location uses Warehouse Receipts a Warehouse Receipt will be created for the Purchase Order and then the Warehouse Receipt application will be shown. |
| Transfer Order | The Transfer Order application will be shown. If your location uses Warehouse Receipts a Warehouse Receipt will be created for the Transfer Order and then the Warehouse Receipt application will be shown. |
| Warehouse Receipt | The Warehouse Receipt application will be shown. |
| Item Barcode | The Receiving Lookup List will be filtered to those Documents that have the scanned Item on it. |
| Text Barcode | The Receiving Lookup List will be filtered as if you had typed the text into the Search Filter. |

If your location requires Warehouse Receipts and you scan a Purchase/Transfer Order barcode or choose one from the Lookup List then an appropriate Warehouse Receipt will be opened or created automatically. You are not required to make Warehouse Receipts prior to using on the handhelds.

 ***Extensibility:*** *To further enhance or change the Lookup List logic you will need to override event RECEIVING::GetDocumentList (ID: 50010) to implement the required logic.*

### 9.1.1 Receiving Lookup List Columns

The Receiving Lookup List can show the following columns.

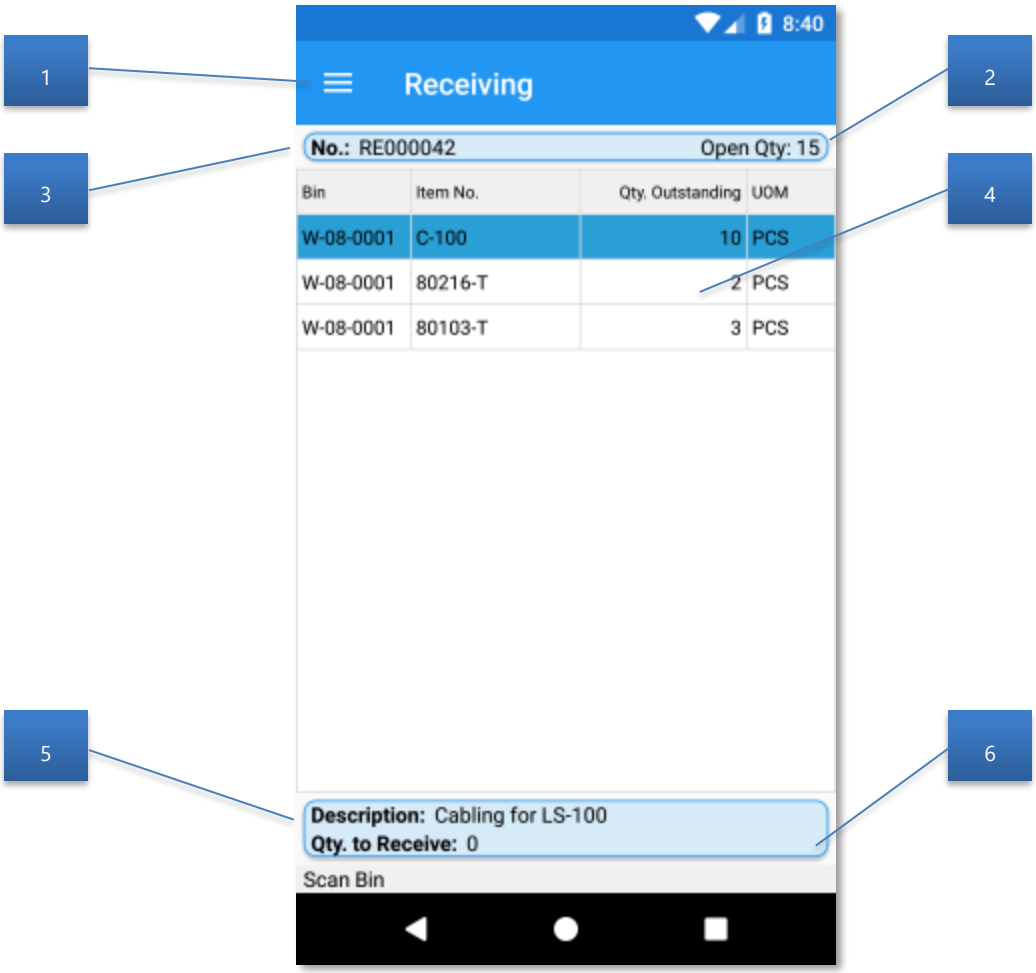
| Column | Description |
|---|---|
| No. | This will either be the Purchase Order, Transfer Order or Warehouse Receipt number. If the Device Configuration Card is set to "Use Source Doc." and using Warehouse Receipts this column will always be the Purchase Order or Transfer |

| | |
|---|---|
| | Order number. The Warehouse Receipt number can instead be reference in the "Doc #" column if needed. |
| Document No. | This will either be the Purchase Order, Transfer Order or Warehouse Receipt number. |
| Assigned User ID | The User ID the document is assigned to. |
| Due Date | The data the document is due by:<br>• Warehouse Receipt Line ->Due Date<br>• Purchase Header -> Due Date<br>• Transfer Header -> Receipt Date |
| Reference No. | • Warehouse Receipt Header -> Vendor Shipment No.<br>• Purchase Header -> Vendor Shipment No.<br>• Transfer Header -> External Document No. |
| Source No. | The source document for the Warehouse Receipt. For locations not using Warehouse Receipts this column will always be blank. |
| Vendor Name | The Buy-From Vendor Name. For Transfer Orders this column will always be empty. |
| Barcode | The generated barcode that will be used if a line is selected. This column does not usually need to be shown. |

## 9.2 Receipt Document

When your location requires Warehouse Receipts the Receiving application page will look like so:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Post<br>• Print<br>• Change Quantity<br>• Enter Bin<br>• Enter Item<br>• Enter License Plate<br>• Start/Stop License Plate<br>• Hide/Show Completed<br>• Item Inquiry<br>• Bin Inquiry |
| 2 | Document number and related header information |
| 3 | The Total Remaining Quantity or Lines to receive for the document |

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| | |
|---|---|
| 4 | The Document Lines |
| 5 | Quantity to Receive, Description and other Line details |
| 6 | Status bar indicating status messages or instructions |

***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the events "RECEIVING::GetReceiptDocument" (ID: 50001), "RECEIVING::GetPurchaseOrder" (ID: 50005) and "RECEIVING::GetTransferOrder" (ID: 50013).*

***Note:*** *If you have Logins enabled on the handheld the Receipt when opened may be automatically assigned to the user logged depending on the Device Configuration setting: "Assign Document".*

### 9.2.1 Receiving Items

The standard process flow should be used when receiving Items:

1. Scan the Bin to receive into
2. Scan the Item to receive
3. Enter the quantity received and Item Tracking Information (if required)

See General Document Handling for more information.

However, most often when using Warehouse Receipts items are always received to a common Bin. If this is the case it makes sense to not require users to scan the Bin to Receive into as there is little chance the user will be making a mistake.

To not require scanning bins during Receiving the "Ignore Bins" option should be checked on the Device Configuration page. If done so then the processes will instead be:

1. Scan the Item to receive
2. Enter the quantity received and Item Tracking Information (if required)

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure to receive.

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***Configuration:*** *Since Warehouse Receipts typically only Receive to a single Bin it is often beneficial to hide the "Bin" column to save view space on the device.*

## 9.2.2 Menus

The following menus are available by default for Receiving. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "WHSE_RECEIPT_DOC", "PURCHASE_IN_DOC" or "TRANSFER_IN_DOC" for the Application.

### *9.2.2.1 Close (Menu)*

Closes the Receiving Document and brings the user back to the Lookup List page.

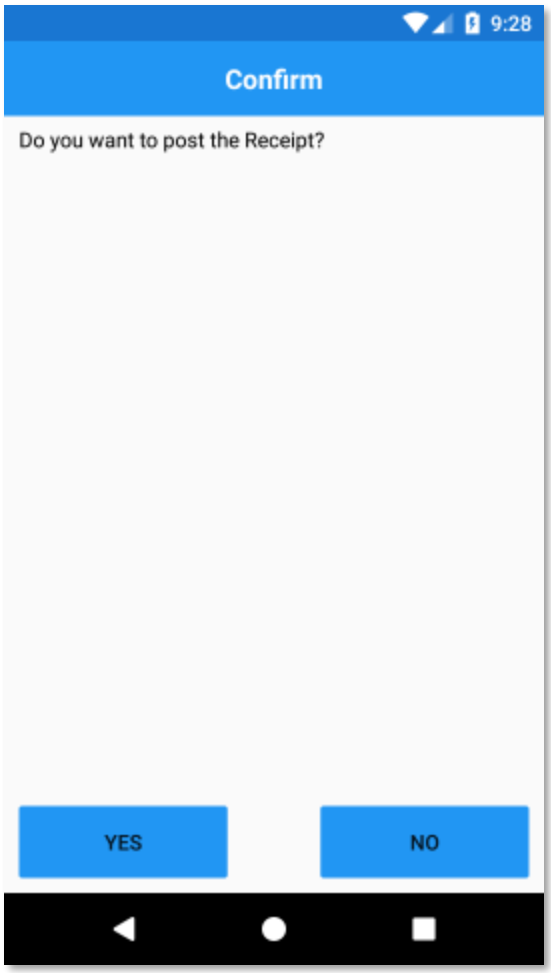
If a License Plate is currently being built the user will be prompted to print the label.

If auto post is enabled, then the document will be posted prior to closing.

### *9.2.2.2 Post (Menu)*

Post the Receiving Document. Users will be prompted to confirm that the post should occur.

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After posting of the document is complete the page will be closed, and the user brought back to the Lookup List page.

---

***Extensibility:*** *To extend or customize the post routine (Post + Print, etc.) you will need to override events: "RECEIVING::PostWhseReceipt" (ID: 50004), "RECEIVING::PostPurchaseOrder" (ID: 50008) or "RECEIVING::PostTransferOrder" (ID: 50015).*

---

#### 9.2.2.3 *Print (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Sends a request to print any configured report(s). You can configure which reports are printed in the IWX Report Selections with the "Whse. Receipt", "Purchase Order" or "Transfer Order" usage.

By default, the reports must be built with a top level DataItem of the type of document being printed. Example: Report "Whse. - Receipt" (ID: 7316) if printing a Warehouse Receipt.

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#### 9.2.2.4 *Enter Bin (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Bin that they wish to simulate scanning.

This option can be useful if Bin labels have become damaged or are inaccessible.



***Note:*** *It is usually more advisable to open the Bin Inquiry module (see menu options) and reprint the label.*

#### 9.2.2.5 *Enter Item (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Item that they wish to simulate scanning.

This option can be useful if Item labels have become damaged or are no longer readable.

***Note:*** *It might be more advisable to open the Item Inquiry module (see menu options) and reprint the item label depending on downstream process requirements (e.g. further scanning or item handling may be required).*

#### 9.2.2.6 *Enter License Plate (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the License Plate number they wish to simulate scanning.

***Note:*** *License Plate labels can be reprinted via the License Plate module on the handhelds but will require exiting the application.*

#### 9.2.2.7 *Start/Stop License Plating (Menu)*

Will initiate a process flow in which Items are received and added to a License Plate.

See Building a License Plate for more information.

#### 9.2.2.8 *Hide/Show Completed (Menu)*

Toggles whether the received lines (those without Outstanding Quantity) are shown or hidden.



***Note:*** *The state of this menu option is saved when the application closes so that next time a Receipt document is opened the hide/show state last used will be applied.*

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#### 9.2.2.9 *Item Inquiry (Menu)*

Launches the Item Inquiry management screen pre-filtered to the selected line.

#### 9.2.2.10 *Bin Inquiry (Menu)*

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

## 9.3 Common Configurations and Requests

This section is intended to describe the most common scenarios, requests and features concerning Receiving. These topics should apply the same to all document types (Purchase Orders, Transfer Orders, Whse. Receipts). While some topics may require development or customizations, they are included here in order to provide a greater understanding of what the software is capable of.

Further information may be obtained from the Support Portal.

### 9.3.1 Printing Labels

Printing labels for Items as they come in the warehouse is often required if there are no existing barcodes on the Items. Where possible existing barcodes should be used (UPC codes, vendor barcodes, etc.). However, if required Warehouse Insight does provide some mechanisms in which to help with printing labels.

For most cases the report to be printed must be configured in the IWX Report Selections page with the "Item Label" usage.

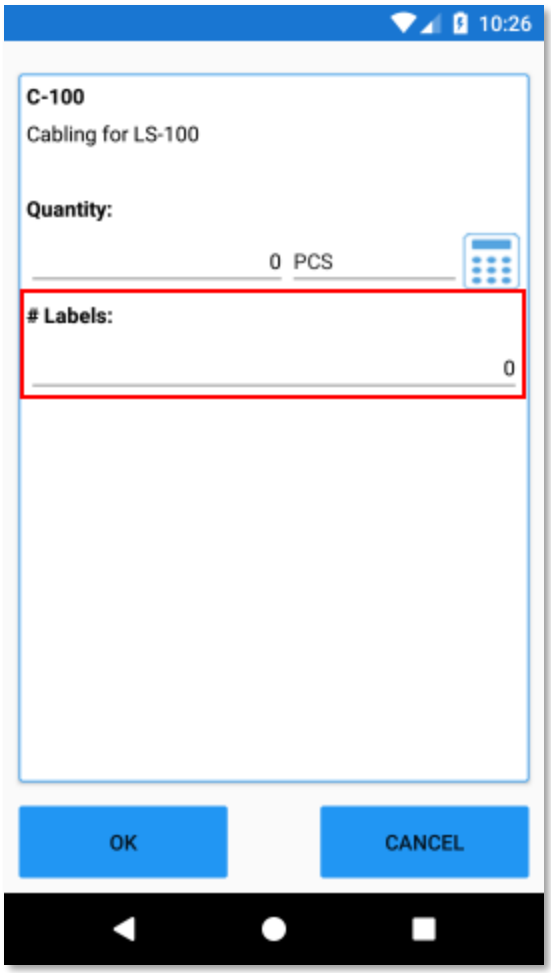
The software provides a sample report that can be used as a reference for printing item labels (report "WMDM Item Barcode Label", ID: 23044511). If designing your own label report, it may be worth reviewing the internal structure of this report as it is designed to work in a variety of printing scenarios (Business Central, Item Inquiry, Receiving, Output).

#### 9.3.1.1 *Label on Quantity Change*

If you would like to print labels after a user has entered a quantity to receive you may enable the "Print on Qty. Change" option on the Device Configuration page. This will send to the label report the receiving particulars (Item, lot/serial number, expiration date, quantity).

If this option is enabled the Quantity dialog will automatically include an additional field or number of labels to be printed, as shown in the screenshot below.

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#### 9.3.1.2 *Pre-Printing Labels*

Sometimes it is desirable to pre-print labels prior to even commencing Receiving. This typically is only an option when Lot/Serial information is not required. Most commonly the existing "Print" menu option is overridden. One method of achieving this is to create a label report that has a top level DataItem of the document in question (e.g. Warehouse Receipt Header) and then have that report iterate the document lines and print Item labels. This option can be achieved without any additional modifications beyond the initial report.

Another option is to use the selected line and implement a custom event to handle the printing based on the selected line. Typically, this is the required approach if you need to prompt for number of labels or any other data. Note though this option will require custom development.

#### 9.3.1.3 *Post & Print*

Another option commonly taken when printing labels is to print them when the document is posted. This has the advantage of knowing all the Serial/Lot numbers and

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thus printing the labels with that information. However, it is not feasible to ask for how many of each item should be printed.

To implement a Post & Print label functionality you must implement a custom event or override the existing Post event.

### 9.3.2 Auto-Generation of Lot/Serial Numbers

If Receiving Lot/Serial tracked items that do not have existing tracking numbers, you may have the system auto-assign an appropriate tracking number when the quantity dialog is displayed. To do so you will need to enable the "Auto Create Lot/Serial Numbers" option on the Device Configuration page. For this option to work the Item must be configured with an appropriate "Serial Nos." or "Lot Nos." defined.

### 9.3.3 Ignoring Bins

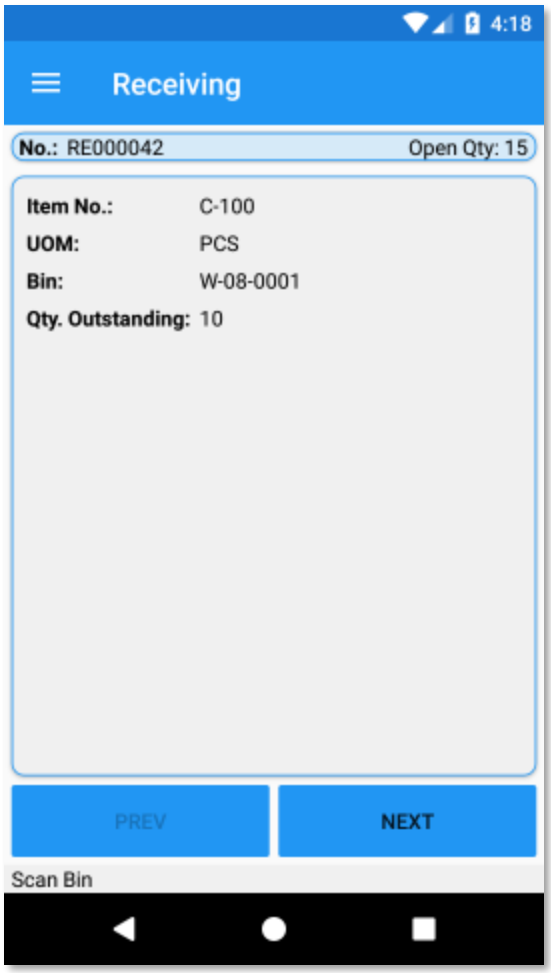
You may ignore Bins during the Receiving process by enabling the "Ignore Bins" option on the Find Lines Templates page in Business Central. This is mostly applicable when using Warehouse Receipts but can also be beneficial when using Purchase Orders or Transfer Orders and the Bins do not need to be validated.

### 9.3.4 Card View

By default, the document screens are shown in "Grid" mode. This allows a user to see all expected Receiving lines and scroll through them. If you wish to limit the display to a single line at a time you may switch the "Display Mode" to "Card View" on the Device Configuration page.

In "Card View" the display will change to appear similar to this:

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Users may still cycle through the lines by pressing the "Previous" and "Next" buttons.

Scanning an Item will find the appropriate line and advance the view to that line as needed (E.g. users do not need to scan the item currently shown on the screen).

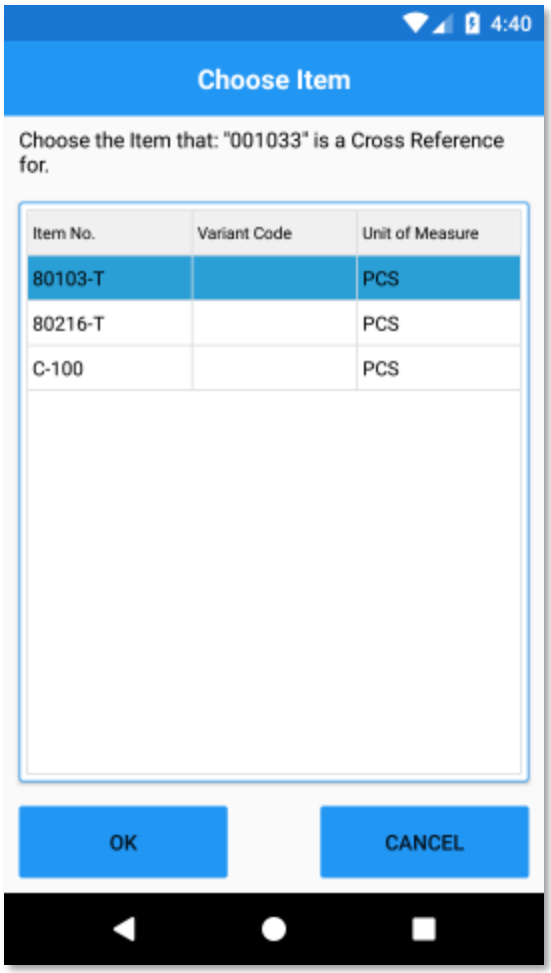
***Note:*** *The data displayed in the "Card" is based on the Device Columns visibility. To show/hide fields you may do so by configuring the Device Columns for the appropriate document event.*

### 9.3.5 Mapping Vendor Barcodes (Cross References)

When possible, Vendor barcodes should be pre-assigned to the relevant Items. However, if it is not possible to do so ahead of time there is an option in Warehouse Insight that will prompt users to create that mapping if an unknown barcode is scanned.

To utilize this feature set the "Unknown Scan Behavior" to "Ask User" in the Device Configuration page. When set, if a barcode is scanned that cannot be interpreted the following dialog will be displayed to the user:

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If it is a Vendors barcode users can then select the appropriate line and press "OK". The barcode will automatically be added to the Items Cross References so that on next scan of the Item it will be properly interpreted.

---

***Note:*** *Only lines that do not have a Quantity to Receive set will be shown. If the quantity has already been set (either fully or partially) it's assumed that the Item has a valid barcode.*

---

### 9.3.6 Capturing Additional Information

If additional information needs to be captured at the time of Receiving, there are a few options available.

1. Add additional fields to the Lot/Serial Information card
2. Extend the Quantity dialog with additional fields

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#### 9.3.6.1 *Adding Fields to Lot/Serial Information Card*

If Receiving a Lot or Serial tracked Items, the Lot/Serial Information card can be shown (when entering quantity). The information card allows users to enter/modify the record and automatically write back.



***Extensibility:*** *Adding additional columns to the Lot/Serial Information card that is shown to users during Receiving can be done by modifying the Device Columns for event "COMMON::GetLotSerialInfo" (ID: 701).*

#### 9.3.6.2 *Extending the Quantity Dialog*

Additional fields may be added directly to the Quantity dialog or displayed on immediately on close of the Quantity dialog. In order to achieve this a Quantity Extension must be created and associated to the relevant Scan Behavior. This method will also require overriding or extending the Update Line events for the document in order to process/utilize the additional data.

For more information on Quantity Extensions reference the Support Portal for examples.



***Note:*** *The Update Line events are: "RECEIVING::UpdateReceiptLine" (ID: 50002), "RECEIVING::UpdatePurchaseLine" (ID: 50006) and "RECEIVING::UpdateTransferLine" (ID: 50014).*

### 9.3.7 Building a License Plate

If required a License Plate may be built up during the Receiving process using the steps outline in Building a License Plate.

All Receiving lines must have the same Bin.

### 9.3.8 Using a License Plate

If required a License Plate that has been previously built can be scanned to Receive. See Using a License Plate for more information.



***Note:*** *The Receipt lines must all have the same bin and match the License Plate Bin. It is not currently possible to receive a License Plate across multiple Bins.*

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# 10 Put-Aways

The "Put-Away" application is responsible for handling Inventory Put-aways and Warehouse Put-aways.

Core features of this application include:

- Lookup Lists for Put-away documents
- Specifying Quantity to Put-away
- Splitting lines and changing Bins
- Posting

You can access the Put-away application from the Home screen by clicking the "Put-away" link.



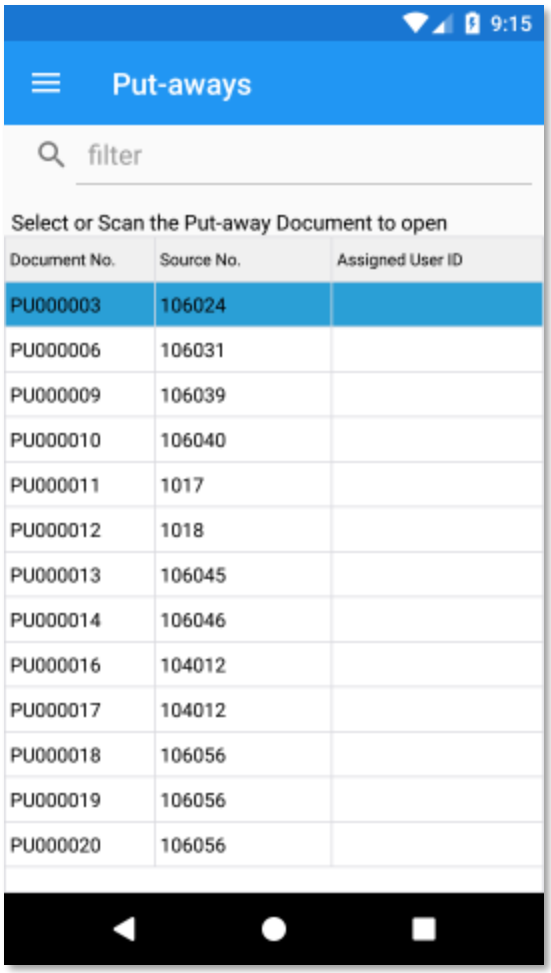

When launched the Put-away Lookup List page will be displayed.

***Note:*** *Inventory Put-aways can often be considered "Receiving" but are handled in this application rather than the "Receiving" application.*

## 10.1 Put-away Lookup List

The Lookup List page allows you to either scan or select the Put-away Document you wish to view.

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***Configuration:*** *The maximum number of Documents that appear in this list is configured in the Warehouse Insight Setup page via the "Document Max List" property (defaults initially to 100).*

Use the filter bar to filter the lookup list to specific Documents if required.

The Put-away Lookup List can be filtered by typing into the Search Filter. The following data is supported for searching:

- Document Number
  - Put-away Documents that have a No. matching the filter will be displayed
- External Document No.
  - Documents that have an External Document No. matching the filter will be displayed
- Source No.
  - Documents that have a "Source No." (Purchase Order, Transfer Order) on the lines that match the filter will be displayed
- Whse. Document No.

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- Documents that have a “Whse. Document No.” (Whse. Receipt) on the lines that match the filter will be displayed

If you have Logins enabled only documents that are un-assigned or explicitly assigned to the logged in user will be shown. If you wish to see all documents regardless of assignment the “Show All Documents” option must be checked on the Device Configuration page.



***Extensibility:*** *To further enhance or change the Lookup List logic you will need to override event: “WHSE ACTIVITY::GetDocumentList” (ID: 20008) to implement the required logic. However, the event is also used for Picks and Movements so additional care must be taken.*

### 10.1.1 Put-Away Lookup List Columns

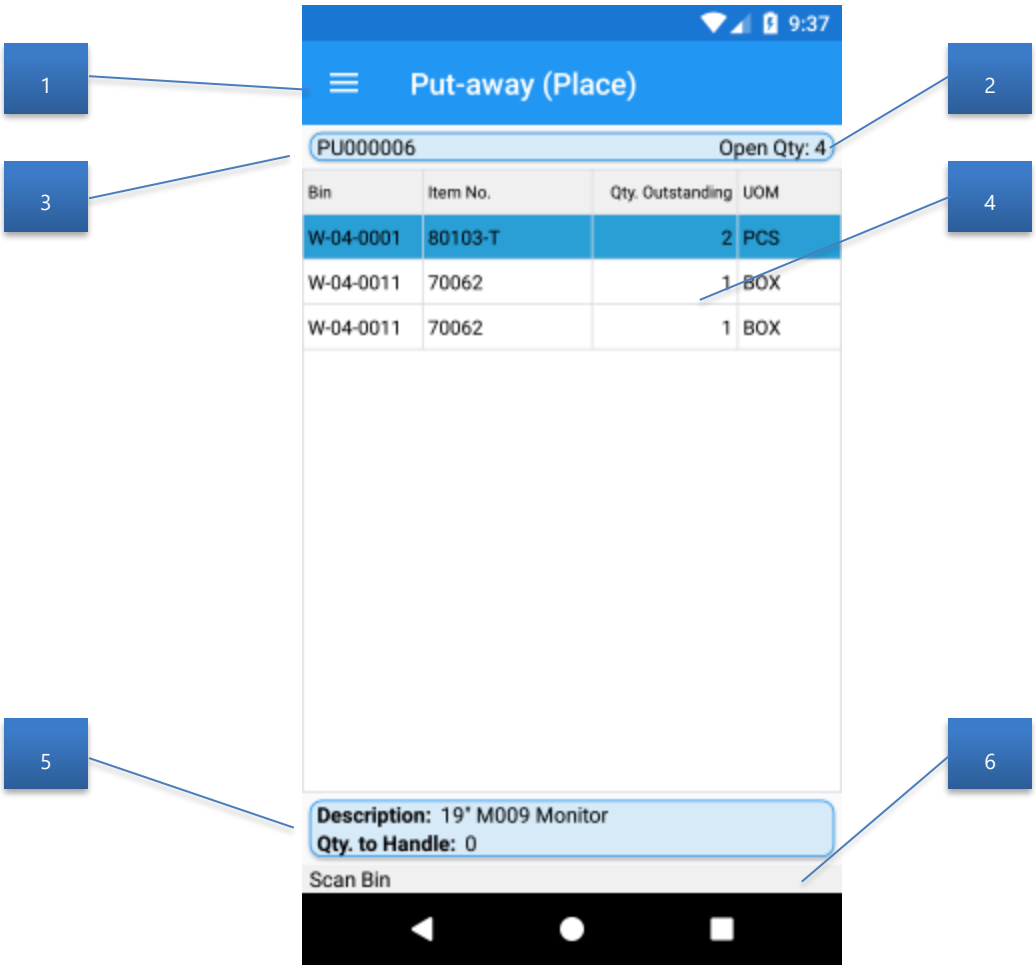
The Put-away Lookup List can show the following columns.

| Column | Description |
|---|---|
| No. | This will either be the Purchase Order, Transfer Order or Put-away number. If the Device Configuration Card is set to “Use Source Doc.” column will always be the Purchase Order or Transfer Order number. The Put-away number can instead be referenced in the “Doc #” column if needed. |
| Document No. | This will be the Put-away number. |
| Assigned User ID | The User ID the document is assigned to. |
| Due Date | The activity lines “Due Date”. |
| Reference No. | The activity lines “External Document No.” |
| Source No. | The source document for the Put-away. |
| Name | The Buy-From Vendor Name for Purchase Orders. For Transfer Orders this column will always be empty. |
| Barcode | The generated barcode that will be used if a line is selected. This column does not usually need to be shown. |

## 10.2 Put-Away Document

When a Put-away is opened the application page will look like so:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Post<br>• Print<br>• Change Quantity<br>• Split Line<br>• Enter Bin<br>• Enter Item<br>• Enter License Plate<br>• Start/Stop License Plate<br>• Hide/Show Completed<br>• Change Bin<br>• Switch Take/Place<br>• Item Inquiry<br>• Bin Inquiry |
| 2 | The Total Remaining Quantity or Lines to put-away for the document |

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| | |
|---|---|
| 3 | Document number and related header information |
| 4 | The Document Lines |
| 5 | Quantity to Handle, Description and other Line details |
| 6 | Status bar indicating status messages or instructions |

***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event "WHSE ACTIVITY::GetDocument" (ID: 20001). However, the columns are currently shared across Picks and Movements so additional care must be taken.*

***Note:*** *If you have Logins enabled on the handheld the Put-away when opened may be automatically assigned to the user logged depending on the Device Configuration setting: "Assign Document".*

## 10.2.1 Putting Away Items

The standard process flow should be used when putting away Items:

1. Scan the Bin to place into
2. Scan the Item to put away
3. Enter the quantity to handle and Item Tracking Information (if required)

See General Document Handling for more information.

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure to put-away.

## 10.2.2 Menus

The following menus are available by default for Put-aways. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "PUT_DOC" for the Application.

### *10.2.2.1 Close (Menu)*

Closes the Put-away document and brings the user back to the Lookup List page.

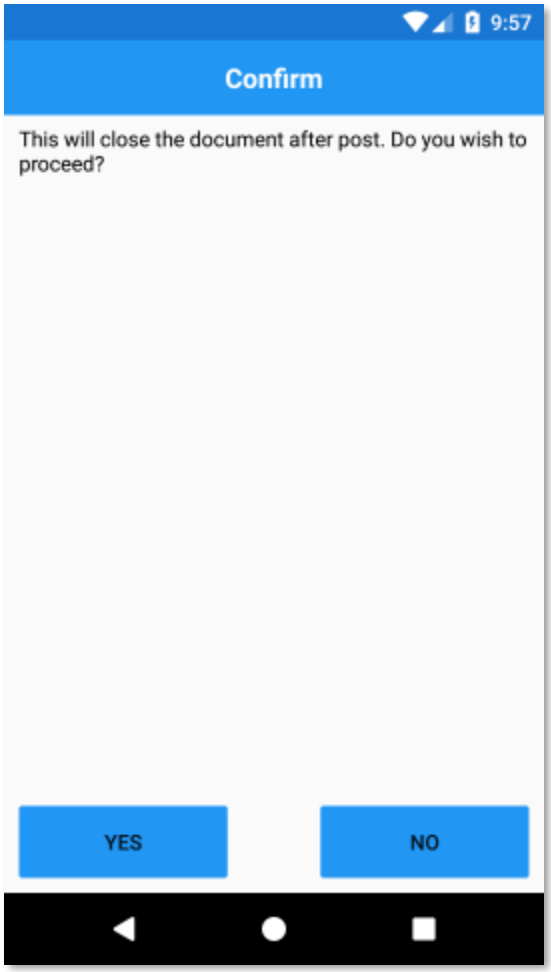
If a License Plate is currently being built the user will be prompted to print the label.

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If auto post is enabled, then the document will be posted prior to closing.

#### 10.2.2.2 *Post (Menu)*

Posts the Put-away document.  Users will be prompted to confirm that the post should occur.




After posting of the document is complete the page will be closed, and the user brought back to the Lookup List page.

***Extensibility:*** *To extend or customize the post routine (Post + Print, etc.) you will need to override event: "WHSE ACTIVITY::Post" (ID: 20003). However, the event is also used for Picks and Movements so additional care must be taken.*

#### 10.2.2.3 *Print (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

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Sends a request to print any configured report(s). You can configure which reports are printed in the IWX Report Selections with the "Put-away" usage.

By default, the reports must be built with a top level DataItem of the type of document being printed. Example: Report "Put-away List" (ID: 5751).

#### *10.2.2.4 Change Quantity (Menu)*

Launches the Quantity dialog for the selected line.

#### *10.2.2.5 Split Line (Menu)*

Will split any un handled quantity to a new line. The place bin will be cleared on the new line.

#### *10.2.2.6 Enter Bin (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Bin that they wish to simulate scanning.

This option can be useful if Bin labels have become damaged or are inaccessible.



***Note:*** *It is usually more advisable to open the Bin Inquiry module (see menu options) and reprint the label.*

#### *10.2.2.7 Enter Item (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Item that they wish to simulate scanning.

This option can be useful if Item labels have become damaged or are no longer readable.

***Note:*** *It might be more advisable to open the Item Inquiry module (see menu options) and reprint the item label depending on downstream process requirements (e.g. further scanning or item handling may be required).*

#### *10.2.2.8 Enter License Plate (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the License Plate number they wish to simulate scanning.

***Note:*** *License Plate labels can be reprinted via the License Plate module on the handhelds but will require exiting the application.*

#### *10.2.2.9 Start/Stop License Plating (Menu)*

Will initiate a process flow in which Items are received and added to a License Plate.

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See Building a License Plate for more information.

#### 10.2.2.10 *Hide/Show Completed (Menu)*

Toggles whether the received lines (those without Outstanding Quantity) are shown or hidden.



***Note:*** *The state of this menu option is saved when the application closes so that next time a Put-away document is opened the hide/show state last used will be applied.*

#### 10.2.2.11 *Change Bin (Menu)*

Changes the Bin for the selected line.

#### 10.2.2.12 *Switch Take/Place (Menu)*

Toggles whether the Take or Place lines are shown. For Inventory Put-aways there will be no "Take" lines.

***Configuration:*** *Normally the "Take" lines would automatically be handled without the user needing to do so. However, if desired it is possible to require processing of both the Take and Place lines by setting the Device Configuration "Auto Handle Put-Away Takes" to false.*

#### 10.2.2.13 *Item Inquiry (Menu)*

Launches the Item Inquiry management screen pre-filtered to the selected line.

#### 10.2.2.14 *Bin Inquiry (Menu)*

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

## 10.3 Common Configurations and Requests

This section is intended to describe the most common scenarios, requests and features concerning Put-aways. While some topics may require development or customizations they are included here in order to provide a greater understanding of what the software is capable of.

Further information may be obtained from the Support Portal.

### 10.3.1 Printing Labels

Printing labels for Items as they come in the warehouse is often required if there are no existing barcodes on the Items. Where possible existing barcodes should be used (UPC codes, vendor barcodes, etc.). However, if required Warehouse Insight does provide some mechanisms in which to help with printing labels.

For most cases the report to be printed must be configured in the IWX Report Selections page with the "Item Label" usage.

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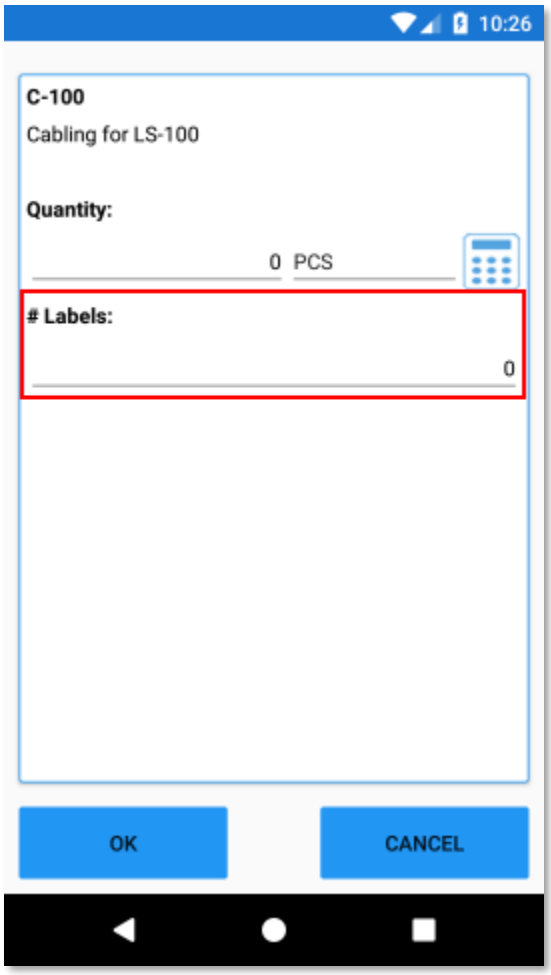
The software provides a sample report that can be used as a reference for printing item labels (report "WMDM Item Barcode Label", ID: 23044511). If designing your own label report, it may be worth reviewing the internal structure of this report as it is designed to work in a variety of printing scenarios (Business Central, Item Inquiry, Receiving, Output).

#### *10.3.1.1 Label on Quantity Change*

The ability to print labels when an item is put-away is incorporated automatically into Inventory Put-aways.

If using Inventory Put-aways and you would like to print labels after a user has entered a quantity to receive you may enable the "Print on Qty. Change" option on the Device Configuration page. This will send to the label report the receiving particulars (Item, lot/serial number, expiration date, quantity).

If this option is enabled the Quantity dialog will automatically include an additional field or number of labels to be printed, as shown in the screenshot below.




***Note:*** *This option is only available when using Inventory Put-aways.*

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#### *10.3.1.2 Pre-Printing Labels*

Sometimes it is desirable to pre-print labels prior to even commencing a Put-away. This typically is only an option when Lot/Serial information is not required. Most commonly the existing "Print" menu option is overridden. One method of achieving this is to create a label report that has a top level DataItem of the document in question (e.g. Warehouse Activity Header) and then have that report iterate the document lines and print Item labels. This option can be achieved without any additional modifications beyond the initial report.

Another option is to use the selected line and implement a custom event to handle the printing based on the selected line. Typically, this is the required approach if you need to prompt for number of labels or any other data. This option will require custom development.

#### *10.3.1.3 Post & Print*

Another option commonly taken when printing labels is to print them when the document is posted. This has the advantage of knowing all the Serial/Lot numbers and thus printing the labels with that information. However, it is not feasible to ask for how many of each item should be printed.

To implement a Post & Print label functionality you must implement a custom event or override the existing Post event.

### 10.3.2 Auto-Generation of Lot/Serial Numbers

If Receiving Lot/Serial tracked items that do not have existing tracking numbers, you may have the system auto-assign an appropriate tracking number when the quantity dialog is displayed. To do so you will need to enable the "Generate Tracking Info" option on the Device Configuration page. For this option to work the Item must be configured with an appropriate "Serial Nos." or "Lot Nos." defined.

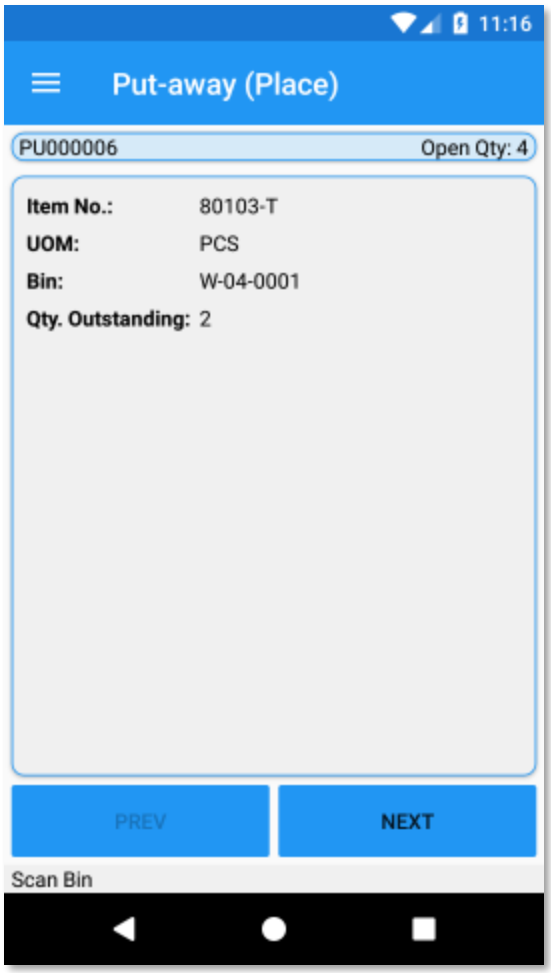


***Note:*** *This option is only available when using Inventory Put-aways.*

### 10.3.3 Card View

By default, the document screens are shown in "Grid" mode. This allows a user to see all expected Put-away lines and scroll through them. If you wish to limit the display to a single line at a time you may switch the "Display Mode" to "Card View" on the Device Configuration page.

In "Card View" the display will change to appear similar to this:




Users may still cycle through the lines by pressing the "Previous" and "Next" buttons.

Scanning an Item will **not** find the appropriate line. The currently shown Bin/Item must match the user scan or an error will be shown.

---

***Note:*** *The data displayed in the "Card" is based on the Device Columns visibility. To show/hide fields you may do so by configuring the Device Columns for the appropriate document event.*

---

### 10.3.4 Building a License Plate

If required a License Plate may be built up during the Put-away process using the steps outline in Building a License Plate.

All Put-away lines must have the same Place Bin.

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### 10.3.5 Using a License Plate

If required a License Plate that has been previously built (as part of the Receiving process) can be scanned to Put-away. See Using a License Plate for more information.



***Note:*** *The Put-away lines must all have the same bin which may require using the "Change Bin" menu option to set the Bins prior to scanning the License Plate. It is not currently possible to put-away a License Plate across multiple Bins.*

### 10.3.6 Auto Split on Quantity Change

When a Put-away cannot be fully placed in the suggested Bin a Split Line is usually required. While users can use the "Split Line" menu option to achieve this result it's often desirable to have the line automatically split. In this scenario as soon as the quantity dialog is closed any unplaced quantity will be automatically split out. To enable this option the "Auto-Split Behavior" on the Device Configuration should be set to "Auto-Split User Quantity".

### 10.3.7 Auto Post Put-away

A Put-away document can be set to auto post when the document is closed. This can prevent users from forgetting to post the document. The "Post" menu option can always be used to post the Put-away but if auto posting of the Put-away is desired, enable the "Auto Register Put-away" option on the Device Configuration.

The option should likely not be used if users are simply taking breaks and intend to come back to the document or might not have dropped the items off at their final location.

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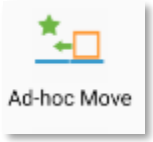
# 11 Ad-Hoc Movements

The “Ad-Hoc Movements” application allows users to move Items between Bins.

Core features of this application include:

- Moving Items without pre-defined instructions
- Ability to move Items to other Locations
- Posting

You can access the Ad-Hoc Movements application from the Home screen by clicking the “Ad-hoc Move” link.




When launched the Ad-Hoc page will be displayed.

---

***Note:*** *The application is essentially an Item Reclass Journal (or Whse. Reclass Journal).*

---

## 11.1 Ad-Hoc Movement Journal

When the application page opens it will look like this:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Post<br>• Print<br>• Delete Line<br>• Copy Line<br>• Change Quantity<br>• Enter Bin<br>• Enter Item<br>• Enter License Plate<br>• Switch Take/Place<br>• Item Inquiry<br>• Bin Inquiry |
| 2 | Current batch and related header information |
| 3 | The Items being moved |

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| | |
|---|---|
| 4 | Additional Line details |
| 5 | Status bar indicating status messages or instructions |



***Extensibility:*** *You may modify the available columns by modifying the Device Columns for the events "ADHOC MOVE::GetReclassJournal" (ID: 20009) and "WHSE ADHOC MOVE::GetJournal" (ID: 20070).*

### 11.1.1 Moving Items

The standard process flow should be used when moving Items:

1. Scan the Bin to move from
2. Scan the Item to move
3. Enter the quantity received and Item Tracking Information (if required)
4. Switch to Place mode
5. Scan the Bin to move to

See General Document Handling for more information.

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure to move.

### 11.1.2 Menus

The following menus are available by default for Ad-Hoc Movements. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "ADHOC_MOVE" for the Application.

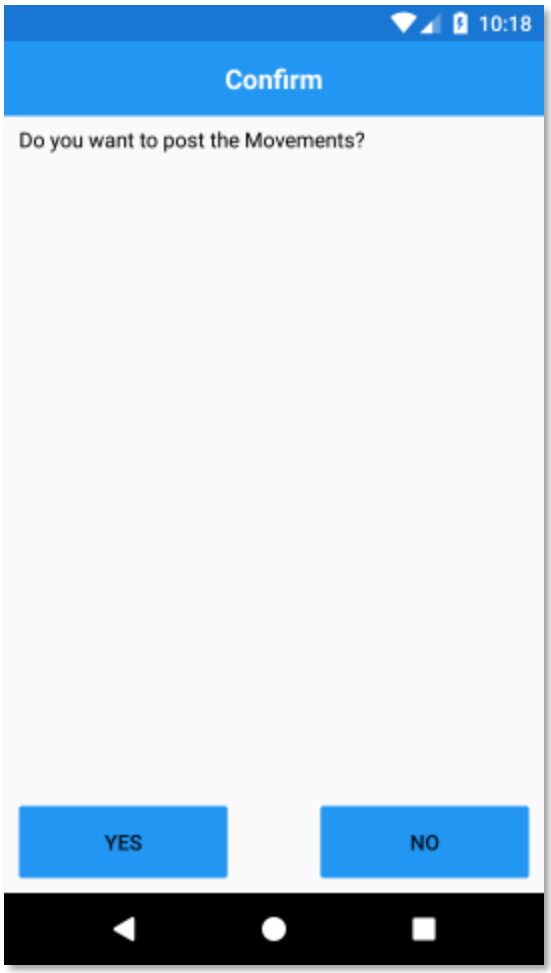
#### *11.1.2.1 Close (Menu)*

Closes the Movement journal and brings the user back to the Home page.

#### *11.1.2.2 Post (Menu)*

Post the journal lines. Users will be prompted to confirm that the post should occur.

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After posting of the document is complete the page will be closed, and the user brought back to the Home page.

***Extensibility:*** *To extend or customize the post routine you will need to override events: "ADHOC MOVE::Post" (ID: 20011) or "WHSE ADHOC MOVE::Post" (ID: 20075).*

#### *11.1.2.3 Print (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Sends a request to print any configured report(s). You can configure which reports are printed in the IWX Report Selections with the "Whse. Reclass Movement" or "Reclass Movement" usage.

By default, the reports must be built with a top level DataItem of the type of journal line being printed. Example: Report "Inventory Movement" (ID: 7321) if printing an Item Reclass Movement.

#### *11.1.2.4 Delete Line (Menu)*

Deletes the currently selected line.

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#### 11.1.2.5 Copy Line (Menu)

Copies the currently selected line. This option is required when taking multiples of the same Item from the same bin or placing into multiple different bins.

#### 11.1.2.6 Change Quantity (Menu)

Launches the Quantity dialog for the selected line.

#### 11.1.2.7 Enter Bin (Menu)

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Bin that they wish to simulate scanning.

This option can be useful if Bin labels have become damaged or are inaccessible.



***Note:*** *It is usually more advisable to open the Bin Inquiry module (see menu options) and reprint the label.*

#### 11.1.2.8 Enter Item (Menu)

This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Item that they wish to simulate scanning.

This option can be useful if Item labels have become damaged or are no longer readable.

***Note:*** *It might be more advisable to open the Item Inquiry module (see menu options) and reprint the item label depending on downstream process requirements (e.g. further scanning or item handling may be required).*

#### 11.1.2.9 Switch Take/Place

Will toggle between the take and place modes. In place mode, only the place Bin needs to be scanned. New lines can only be added while in take mode.

#### 11.1.2.10 Item Inquiry (Menu)

Launches the Item Inquiry management screen pre-filtered to the selected line.

#### 11.1.2.11 Bin Inquiry (Menu)

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

## 11.2 Common Configurations and Requests

This section is intended to describe the most common scenarios, requests and features concerning Receiving. These topics should apply the same to all document types (Purchase Orders, Transfer Orders, Whse. Receipts). While some topics may require development or customizations, they are included here in order to provide a greater understanding of what the software is capable of.

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Further information may be obtained from the Support Portal.

### 11.2.1 Moving Items to Different Locations

The Item Reclass Movements support moving Items from one Location to another, not just Bins. Only the place Location may be changed, the take location will always be the device's configured location. To specify a new Location, take the following steps:

1. Create Take line(s)
2. Switch to Place mode
3. Select a Take line
4. Scan the Location barcode
    a. If the new Location does not require Bins the New Location will be updated
5. Scan the Bin to move to
    a. The New Bin and New Location fields will be updated

---

***Note:*** *If handling multiple lines going to the same Location (requiring Bins) you do not need to scan the Location again as all subsequent Bin scans will update the Location.*

---

### 11.2.2 Moving License Plates

The Ad-Hoc movement supports scanning License Plates to move. When a License Plate is scanned the entire License Plate must be moved to the new Bin. To move License Plates, take the following steps:

1. Switch to Take mode
2. Scan the Bin the License Plate is in
3. In the LP Assignment dialog change quantities and usage actions
    a. See Using a License Plate for more information
4. Switch to Place mode
5. Scan the Bin to move to
    a. All License Plate generated Lines will be updated (unless the usage action indicated the LP was not to be used).

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# 12 Directed Movements

The “Directed Movements” application is responsible for handling Inventory Movements and Warehouse Movements.

Core features of this application include:

- Lookup Lists for Movement documents
- Specifying Quantity to Move
- Changing Bins
- Posting

You can access the Movement application from the Home screen by clicking the “Movement” link.

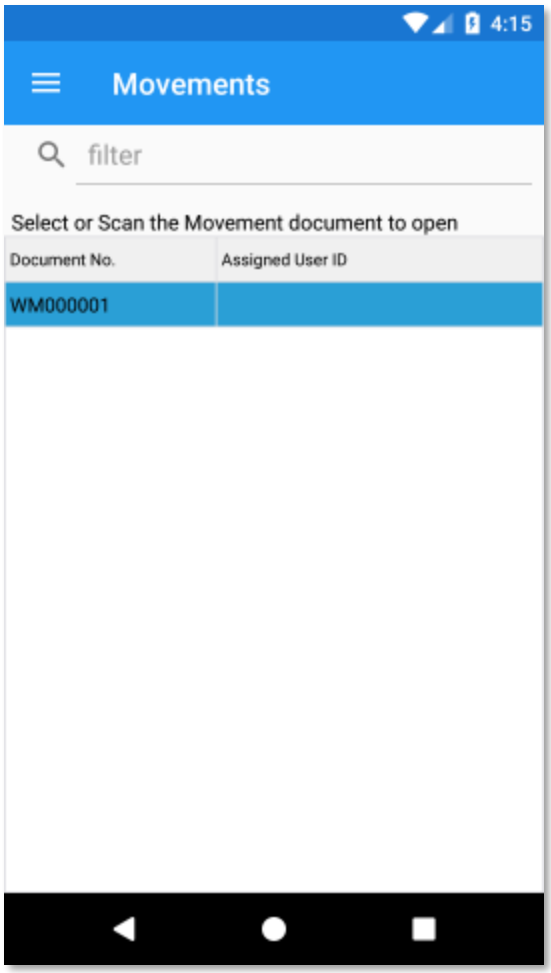



When launched the Movement Lookup List page will be displayed.

## 12.1 Movement Lookup List

The Lookup List page allows you to either scan or select the Movement Document you wish to view.

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***Configuration:*** *The maximum number of Documents that appear in this list is configured in the Warehouse Insight Setup page via the "Document Max List" property (defaults initially to 100).*

Use the filter bar to filter the lookup list to specific Documents if required.

The Movement Lookup List can be filtered by typing into the Search Filter. The following data is supported for searching:

- Document Number
  - Movement Documents that have a No. matching the filter will be displayed
- External Document No.
  - Documents that have an External Document No. matching the filter will be displayed
- Source No.
  - Documents that have a "Source No." on the lines that match the filter will be displayed

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If you have Logins enabled only documents that are un-assigned or explicitly assigned to the logged in user will be shown. If you wish to see all documents regardless of assignment the "Show All Documents" option must be checked on the Device Configuration page.



***Extensibility:*** *To further enhance or change the Lookup List logic you will need to override event: "WHSE ACTIVITY::GetDocumentList" (ID: 20008) to implement the required logic. However, the event is also used for Picks and Put-aways so additional care must be taken.*

### 12.1.1 Movement Lookup List Columns

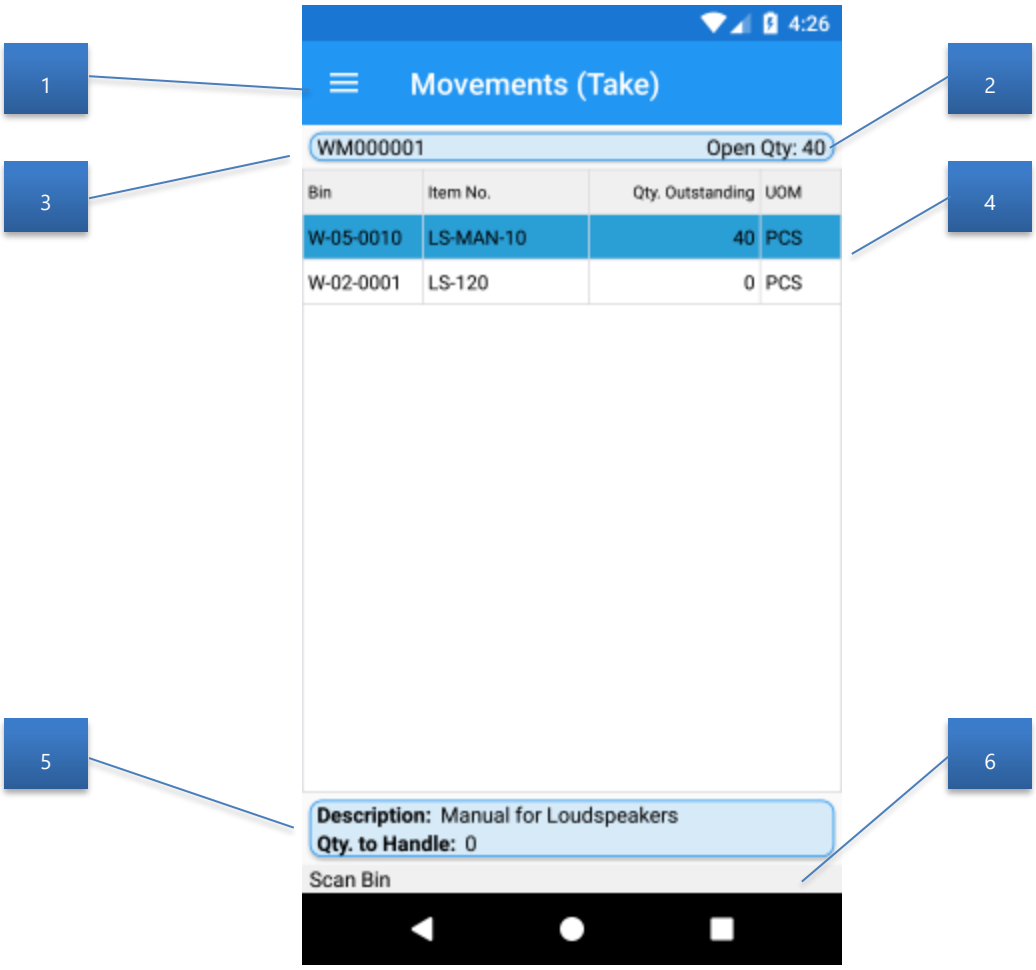
The Movement Lookup List can show the following columns.

| Column | Description |
|---|---|
| No. | This will either be the Source number or Movement number. If the Device Configuration Card is set to "Use Source Doc." column will always be the Source number. The Movement number can instead be referenced in the "Doc #" column if needed. |
| Document No. | This will be the Movement number. |
| Assigned User ID | The User ID the document is assigned to. |
| Due Date | The activity lines "Due Date". |
| Reference No. | The activity lines "External Document No." |
| Source No. | The source document for the Movement. |
| Name | This column will always be empty. |
| Barcode | The generated barcode that will be used if a line is selected. This column does not usually need to be shown. |

## 12.2 Movement Document

When a Movement is opened the application page will look like so:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Post<br>• Print<br>• Change Quantity<br>• Enter Bin<br>• Enter Item<br>• Enter License Plate<br>• Start/Stop License Plate<br>• Hide/Show Completed<br>• Change Bin<br>• Switch Take/Place<br>• Item Inquiry<br>• Bin Inquiry |
| 2 | The Total Remaining Quantity or Lines to move for the document |

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| | |
|---|---|
| 3 | Document number and related header information |
| 4 | The Document Lines |
| 5 | Quantity to Handle, Description and other Line details |
| 6 | Status bar indicating status messages or instructions |



***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event "WHSE ACTIVITY::GetDocument" (ID: 20001). However, the columns are currently shared across Picks and Put-aways so additional care must be taken.*



***Note:*** *If you have Logins enabled on the handheld the Movement when opened may be automatically assigned to the user logged depending on the Device Configuration setting: "Assign Document".*

## 12.2.1 Moving Items

The standard process flow should be used when moving Items:

1. Scan the Bin to move from
2. Scan the Item to move
3. Enter the quantity to handle and Item Tracking Information (if required)

See General Document Handling for more information.

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure to move.

## 12.2.2 Menus

The following menus are available by default for Movements. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "MOVE_DOC" for the Application.

### *12.2.2.1 Close (Menu)*

Closes the Movement document and brings the user back to the Lookup List page.

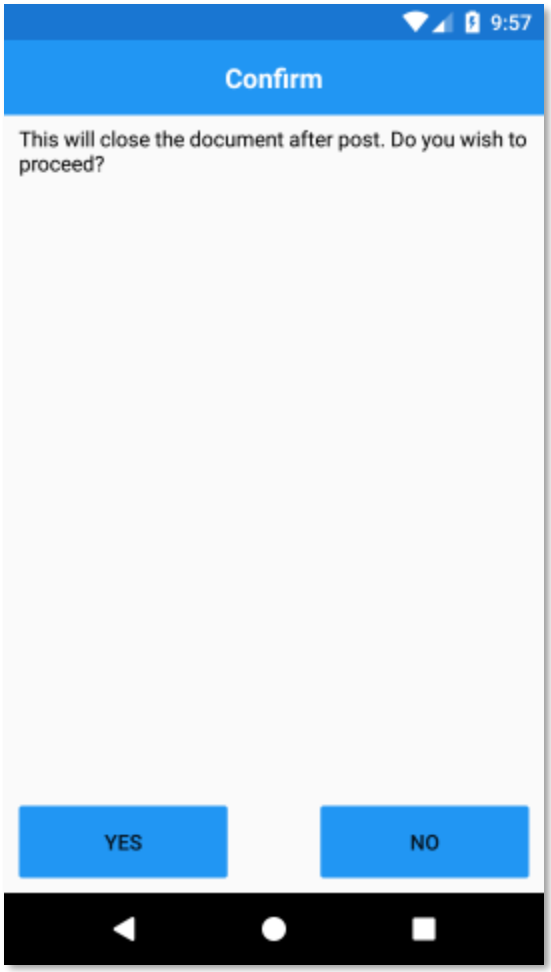
If a License Plate is currently being built the user will be prompted to print the label.

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If auto post is enabled, then the document will be posted prior to closing.

#### 12.2.2.2 Post (Menu)

Posts the Movement document. Users will be prompted to confirm that the post should occur.




After posting of the document is complete the page will be closed, and the user brought back to the Lookup List page.

***Extensibility:*** *To extend or customize the post routine (Post + Print, etc.) you will need to override event: "WHSE ACTIVITY::Post" (ID: 20003). However, the event is also used for Picks and Put-aways so additional care must be taken.*

#### 12.2.2.3 Print (Menu)

This option his hidden by default but can be made visible via the Device Menus page.

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Sends a request to print any configured report(s). You can configure which reports are printed in the IWX Report Selections with the "Movement" or "Inv. Move" usage.

By default, the reports must be built with a top level DataItem of the type of document being printed. Example: Report "Movement List" (ID: 7301).

#### *12.2.2.4 Change Quantity (Menu)*

Launches the Quantity dialog for the selected line.

#### *12.2.2.5 Enter Bin (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Bin that they wish to simulate scanning.

This option can be useful if Bin labels have become damaged or are inaccessible.

---

 ***Note:*** *It is usually more advisable to open the Bin Inquiry module (see menu options) and reprint the label.*

---

#### *12.2.2.6 Enter Item (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Item that they wish to simulate scanning.

This option can be useful if Item labels have become damaged or are no longer readable.

---

***Note:*** *It might be more advisable to open the Item Inquiry module (see menu options) and reprint the item label depending on downstream process requirements (e.g. further scanning or item handling may be required).*

---

#### *12.2.2.7 Enter License Plate (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the License Plate number they wish to simulate scanning.

---

***Note:*** *License Plate labels can be reprinted via the License Plate module on the handhelds but will require exiting the application.*

---

#### *12.2.2.8 Start/Stop License Plating (Menu)*

Will initiate a process flow in which Items are received and added to a License Plate.

#### *12.2.2.9 Hide/Show Completed (Menu)*

Toggles whether the received lines (those without Outstanding Quantity) are shown or hidden.

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***Note:*** *The state of this menu option is saved when the application closes so that next time a Movement document is opened the hide/show state last used will be applied.*

#### *12.2.2.10 Change Bin (Menu)*

Changes the Bin for the selected line.

#### *12.2.2.11 Switch Take/Place (Menu)*

Toggles whether the Take or Place lines are shown.

***Configuration:*** *Normally the user must handle both the "Take" and "Place" operations. However, if desired it is possible to not require processing of the Place lines by setting the Device Configuration "Auto Handle Move Placements" to true.*

#### *12.2.2.12 Item Inquiry (Menu)*

Launches the Item Inquiry management screen pre-filtered to the selected line.

#### *12.2.2.13 Bin Inquiry (Menu)*

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

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# 13 Picking

The “Pick” application is responsible for handling Warehouse and Inventory Pick transactions.

Core features of this application include:

- Lookup Lists for Pick documents
- Picking to License Plates
- Picking to Totes
- Line Splitting
- Updating Warehouse Shipment quantities/tracking (if desired)
- Posting

You can access the Picking application from the Home screen by clicking the “Pick” link.



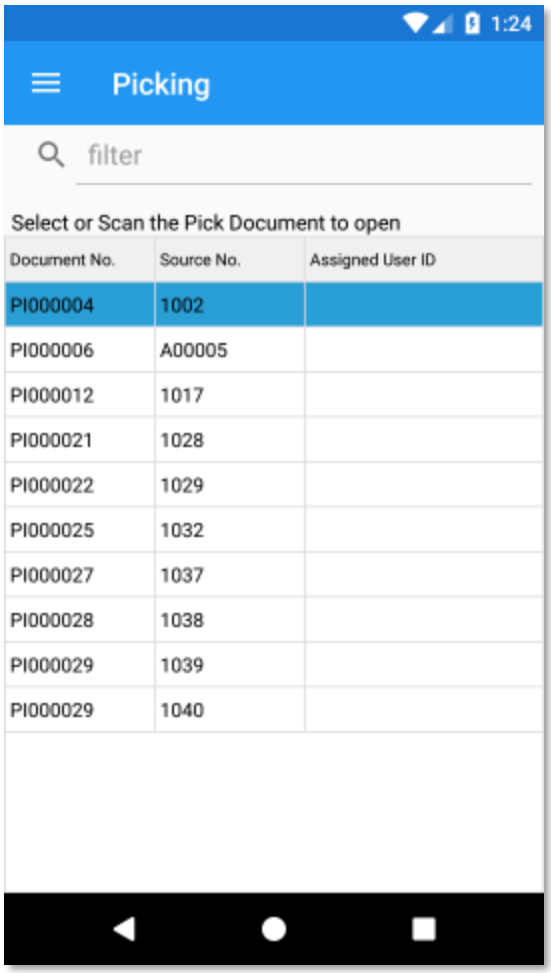

When launched the Picking Lookup List page will be displayed.

***Note:*** *Inventory Picks function almost identically to Warehouse Picks.*

## 13.1 Picking Lookup List

The Lookup List page allows you to either scan or select the Pick Document you wish to view.

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***Configuration:*** *The maximum number of Documents that appear in this list is configured in the Warehouse Insight Setup page via the "Document Max List" property (defaults initially to 100).*

Use the filter bar to filter the lookup list to specific Documents if required.

The Picking Lookup List can be filtered by typing into the Search Filter. The following data is supported for searching:

- Document Number
  - Pick Documents that have a No. matching the filter will be displayed
- External Document No.
  - Documents that have an External Document No. matching the filter will be displayed
- Source No.
  - Documents that have a "Source No." (Sales Order, Transfer Order, Assembly Order) on the lines that match the filter will be displayed
- Whse. Document No.

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- Documents that have a “Whse. Document No.” (Whse. Shipment) on the lines that match the filter will be displayed

If you have Logins enabled only documents that are un-assigned or explicitly assigned to the logged in user will be shown. If you wish to see all documents regardless of assignment the “Show All Documents” option must be checked on the Device Configuration page.



***Extensibility:*** *To further enhance or change the Lookup List logic you will need to override event: “WHSE ACTIVITY::GetDocumentList” (ID: 20008) to implement the required logic. However, the event is also used for Put-aways and Movements so additional care must be taken.*

### 13.1.1 Picking Lookup List Columns

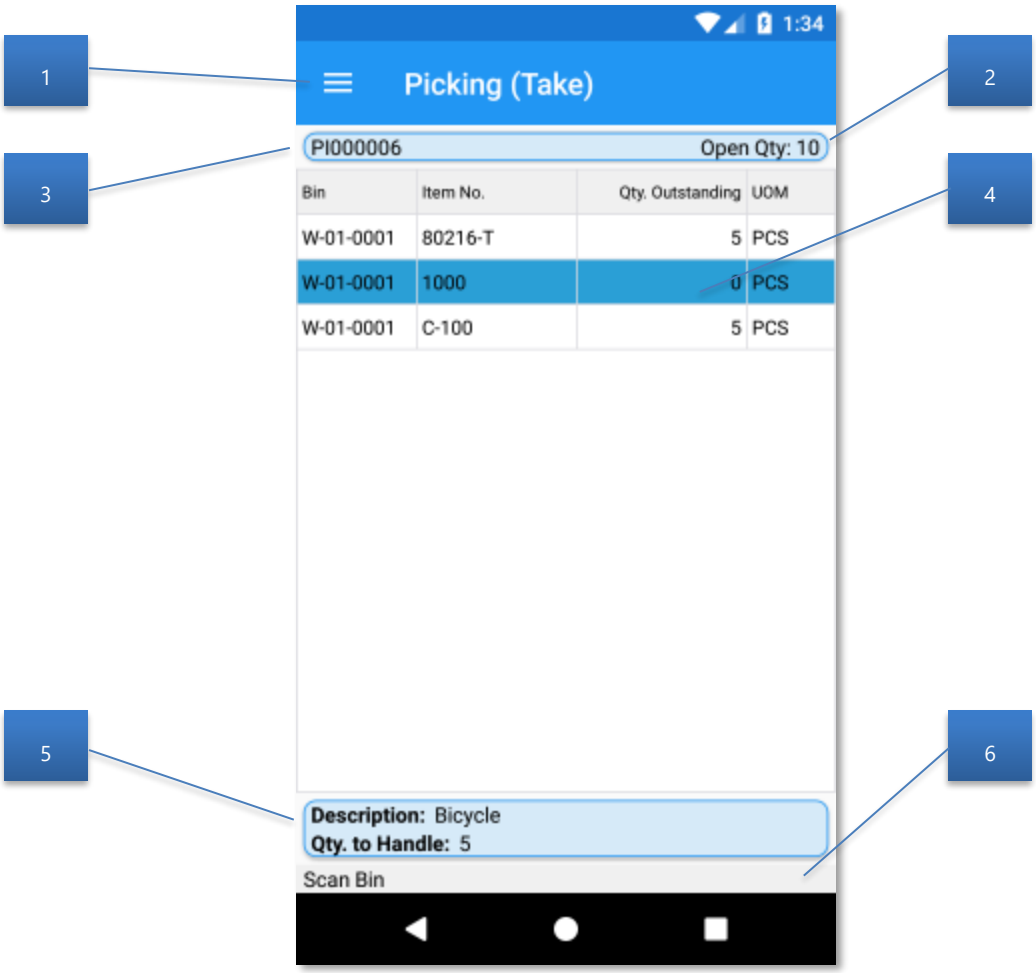
The Picking Lookup List can show the following columns.

| Column | Description |
|---|---|
| No. | This will either be the Sales Order, Transfer Order, Assembly Order or Pick number. If the Device Configuration Card is set to “Use Source Doc.” column will always be the Sales Order or Transfer Order number. The Pick number can instead be referenced in the “Doc #” column if needed. |
| Document No. | This will be the Pick number. |
| Assigned User ID | The User ID the document is assigned to. |
| Due Date | The activity lines “Due Date”. |
| Reference No. | The activity lines “External Document No.” |
| Source No. | The source document for the Pick. |
| Name | The Sell-to Customer Name for Sales Orders. For Transfer Orders this column will always be empty. |
| Barcode | The generated barcode that will be used if a line is selected. This column does not usually need to be shown. |

## 13.2 Pick Document

When a Pick is opened the application page will look like so:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Post<br>• Print<br>• Change Quantity<br>• Split Line<br>• Enter Bin<br>• Enter Item<br>• Enter License Plate<br>• Start/Stop License Plate<br>• Hide/Show Completed<br>• Change Bin<br>• Switch Take/Place<br>• Item Inquiry<br>• Bin Inquiry |
| 2 | The Total Remaining Quantity or Lines to pick for the document |

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| | |
|---|---|
| 3 | Document number and related header information |
| 4 | The Document Lines |
| 5 | Quantity to Handle, Description and other Line details |
| 6 | Status bar indicating status messages or instructions |



***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event "WHSE ACTIVITY::GetDocument" (ID: 20001). However, the columns are currently shared across Put-aways and Movements so additional care must be taken.*



***Note:*** *If you have Logins enabled on the handheld the Pick when opened may be automatically assigned to the user logged depending on the Device Configuration setting: "Assign Document".*

### 13.2.1 Picking Items

The standard process flow should be used when picking Items:

1. Scan the Bin to take from
2. Scan the Item to pick
3. Enter the quantity to handle and Item Tracking Information (if required)

See General Document Handling for more information.

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure to pick.

### 13.2.2 Menus

The following menus are available by default for Picks. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "PICK_DOC" for the Application.

#### *13.2.2.1 Close (Menu)*

Closes the Pick document and brings the user back to the Lookup List page.

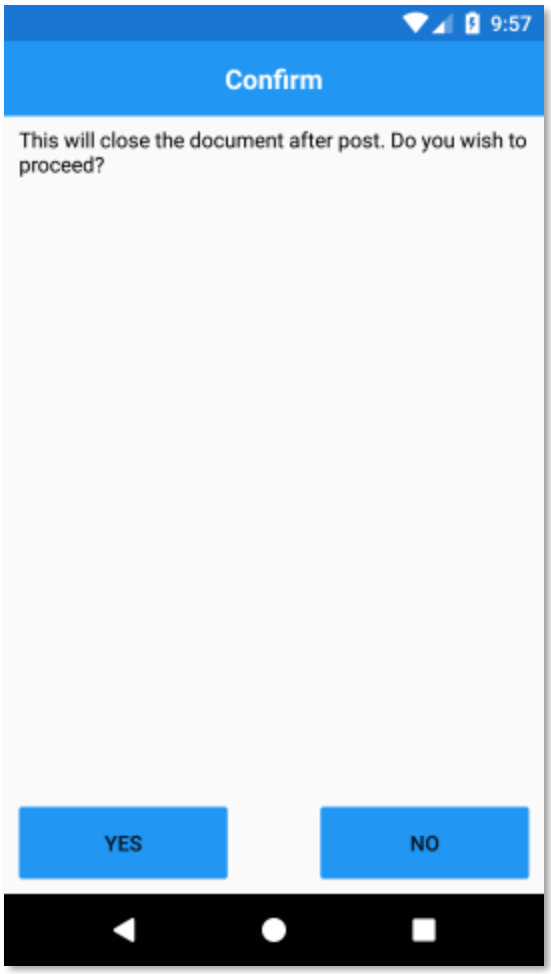
If a License Plate is currently being picked to the user will be prompted to print the label.

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If auto post is enabled, then the document will be posted prior to closing.

#### 13.2.2.2 Post (Menu)

Posts the Pick document.  Users will be prompted to confirm that the post should occur.




After posting of the document is complete the page will be closed, and the user brought back to the Lookup List page.

---

***Extensibility:*** *To extend or customize the post routine (Post + Print, etc.) you will need to override event: "WHSE ACTIVITY::Post" (ID: 20003). However, the event is also used for Put-aways and Movements so additional care must be taken.*

---

#### 13.2.2.3 Print (Menu)

This option his hidden by default but can be made visible via the Device Menus page.

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Sends a request to print any configured report(s). You can configure which reports are printed in the IWX Report Selections with the "Pick" usage.

By default, the reports must be built with a top level DataItem of the type of document being printed. Example: Report "Picking List" (ID: 5752).

#### *13.2.2.4 Change Quantity (Menu)*

Launches the Quantity dialog for the selected line.

#### *13.2.2.5 Split Line (Menu)*

Will split any un handled quantity to a new line. The take bin and lot/serial numbers will be cleared on the new line.

#### *13.2.2.6 Enter Bin (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Bin that they wish to simulate scanning.

This option can be useful if Bin labels have become damaged or are inaccessible.



***Note:*** *It is usually more advisable to open the Bin Inquiry module (see menu options) and reprint the label.*

#### *13.2.2.7 Enter Item (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Item that they wish to simulate scanning.

This option can be useful if Item labels have become damaged or are no longer readable.

***Note:*** *It might be more advisable to open the Item Inquiry module (see menu options) and reprint the item label depending on downstream process requirements (e.g. further scanning or item handling may be required).*

#### *13.2.2.8 Enter License Plate (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the License Plate number they wish to simulate scanning.

***Note:*** *License Plate labels can be reprinted via the License Plate module on the handhelds but will require exiting the application.*

#### *13.2.2.9 Start/Stop License Plating (Menu)*

Will initiate a process flow in which Items are received and added to a License Plate.

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See Picking to License Plates for more information.

#### 13.2.2.10 Hide/Show Completed (Menu)

Toggles whether the received lines (those without Outstanding Quantity) are shown or hidden.



***Note:*** *The state of this menu option is saved when the application closes so that next time a Pick document is opened the hide/show state last used will be applied.*

#### 13.2.2.11 Change Bin (Menu)

Changes the Bin for the selected line.

#### 13.2.2.12 Switch Take/Place (Menu)

Toggles whether the Take or Place lines are shown. For Inventory Picks there will be no "Place" lines.

***Configuration:*** *Normally the "Place" lines would automatically be handled without the user needing to do so. However, if desired it is possible to require processing of both the Take and Place lines by setting the Device Configuration "Auto Handle Pick Placements" to false.*

#### 13.2.2.13 Item Inquiry (Menu)

Launches the Item Inquiry management screen pre-filtered to the selected line.

#### 13.2.2.14 Bin Inquiry (Menu)

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

#### 13.2.2.15 Assign Totes

This option his hidden by default but can be made visible via the Device Menus page.

Pressing this menu option will mark the Pick for "Tote Picking" and prompt the user to assign totes to the source documents.

See Picking to Totes for additional information.

## 13.3 Common Configurations and Requests

This section is intended to describe the most common scenarios, requests and features concerning Put-aways. While some topics may require development or customizations they are included here in order to provide a greater understanding of what the software is capable of.

Further information may be obtained from the Support Portal.

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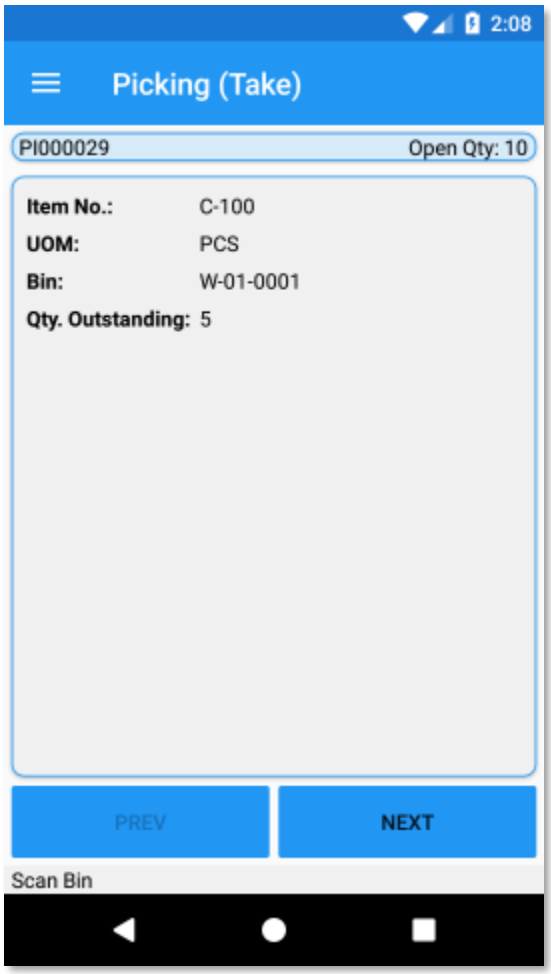
#### *13.3.1.1 Post & Ship*

If required, the posting of a Warehouse Pick may be overridden to also post the associated Warehouse Shipment(s). In order to do so the Pick posting event must be extended to also cycle through the Warehouse Shipments and call the shipping post codeunits. This will require custom development.

### 13.3.2 Card View

By default, the document screens are shown in "Grid" mode. This allows a user to see all expected Pick lines and scroll through them. If you wish to limit the display to a single line at a time you may switch the "Display Mode" to "Card View" on the Device Configuration page.

In "Card View" the display will change to appear similar to this:




Users may still cycle through the lines by pressing the "Previous" and "Next" buttons.

Scanning an Item will **not** find the appropriate line. The currently shown Bin/Item must match the user scan or an error will be shown.

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***Note:*** *The data displayed in the "Card" is based on the Device Columns visibility. To show/hide fields you may do so by configuring the Device Columns for the appropriate document event.*

### 13.3.3 Picking to License Plates

If required a License Plate may be built up during the Pick process using the steps outline in Building a License Plate.

***Note:*** *The Pick lines do not need to all come from the same Bin. The first Bin picked from will be set on the License Plate. When the Pick is posted the License Plate will update to the Shipment Bin (if Warehouse Shipments are used).*

### 13.3.4 Using a License Plate

If required, a License Plate that has been previously can be scanned to Pick. See Using a License Plate for more information.

***Note:*** *The Pick lines must all have the same bin which may require using the "Change Bin" menu option to set the Bins prior to scanning the License Plate. It is not currently possible to pick a License Plate across multiple Bins.*

### 13.3.5 Picking to Totes

Picking to Totes allows users to pick items based on the Source document into specified "totes" that are used to facilitate shipping and packing. This option is useful when pack and ship is separate from the picking process.

Tote Picking is currently only supported on Picks associated with Warehouse Shipments.

Totes are special purpose License Plates that have the "Tote" flag set to "Yes". These License Plates are intended to be re-used between Picks and not to be shipped out. If you need to ship the totes, consider using the "Picking to License Plates" process instead.

In order to use Tote Picking the following steps should be taken:

1. Mark the Pick as Needing Totes

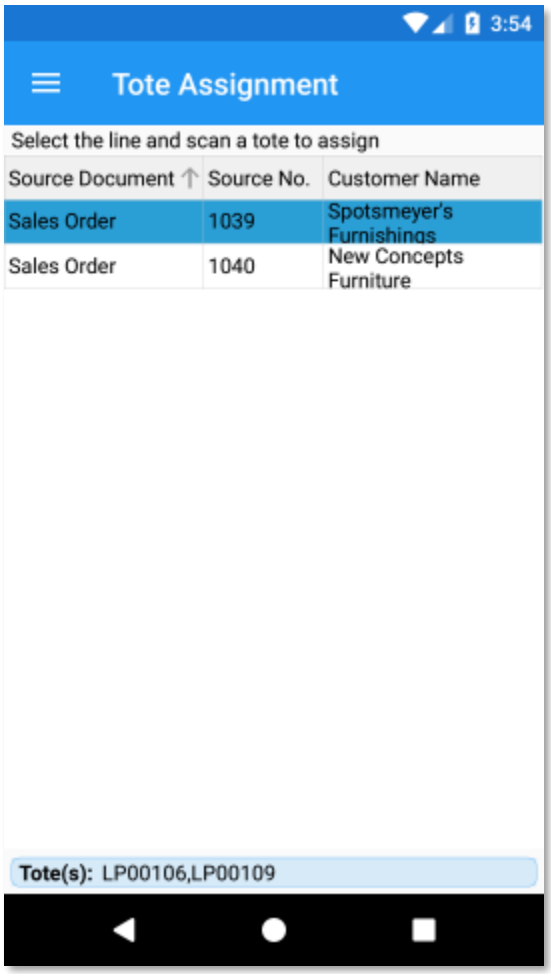
When the Pick document has been opened press the "Assign Totes" menu option. This will flag the pick as requiring Totes.

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***Note:*** *If the document is closed and then reopened and the user wishes to continue tote picking they must press the "Assign Totes" menu option again though no totes need to be assigned. Similarly, if mixing the order to only partially tote pick some lines then the user must finish the tote picks, close and reopen the document. Then the non-tote pick lines may be picked.*

2. Assign the Totes

When opened a dialog indicating the source documents and any associated totes will be shown, similar to this:




A source document may have multiple totes assigned to it. However, a tote may only be assigned to a single source document. If you wish to change the assignment simply select the appropriate line and scan the tote again.

The License Plates "Tote Whse. Document No." and "Tote Source No." fields will be updated behind the scenes to reflect the tote assignment.

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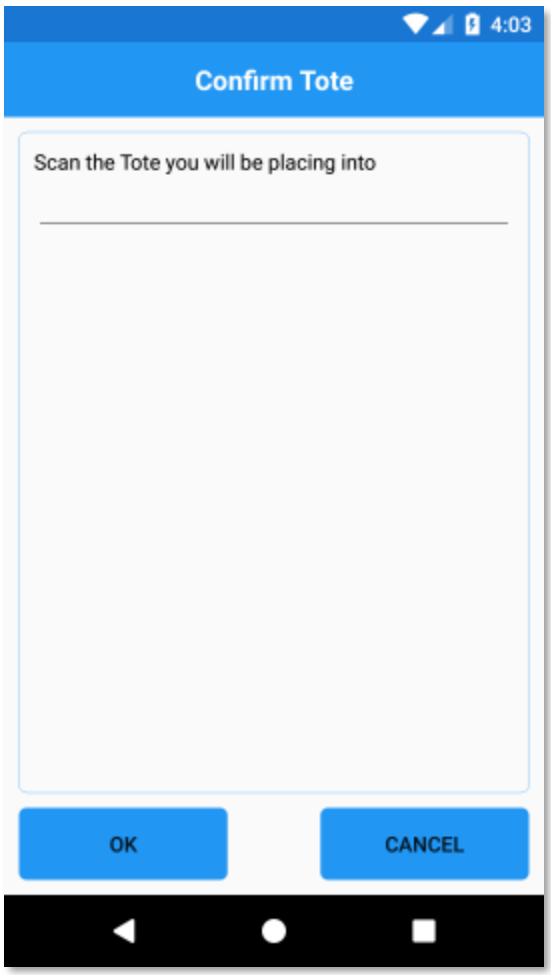
***Note:*** *It is possible to pre-assign totes in Business Central however the "Assign Totes" menu option must still be pressed in order to put the Pick into Tote Assignment mode.*

3. Scan the Bins and Items to Pick

Follow the normal processes for picking Items. Scan the Bin to take from, the Item to take and the quantity to pick.

4. Confirm the Tote Placement

After the quantity has been entered there will be an additional dialog presented asking the user to confirm the tote that the item is being placed into.




If an incorrect tote is scanned an error will be displayed and the user must repeat the change quantity process again.

5. Post the Pick

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When the Pick is posted the items and License Plates will not be automatically transferred to the Warehouse Shipment. However, the "Tote Whse. Document No." will be updated to reflect that it is now associated with the shipment.



***Note:*** *Regardless of the "Update Shipment on Pick" setting totes will not be 'assigned' to the Warehouse Shipment and tracking information will not be updated.*

6. Post the Warehouse Shipment

When the Warehouse Shipment is posted the Tote will be reset. All lines, usage and tote assignments will be cleared, and the tote will now be available for picking.

A Tote may also be emptied prior to posting by scanning the Tote. Scanning the Tote will prompt the user if they wish to empty it.



***Note:*** *A Tote may be scanned on the shipping lookup list to bring up the associated Warehouse Shipment.*

### 13.3.6 Auto Split on Quantity Change

When a Pick cannot be fully handled by the suggested Bin a Split Line is usually required. While users can use the "Split Line" menu option to achieve this result it's often desirable to have the line automatically split. In this scenario as soon as the quantity dialog is closed any unplaced quantity will be automatically split out. To enable this option the "Auto-Split Behavior" on the Device Configuration should be set to "Auto-Split User Quantity".

### 13.3.7 Auto Post Pick

A Pick document can be set to auto post when the document is closed. This can prevent users from forgetting to post the document. The "Post" menu option can always be used to post the Pick but if auto posting of the Pick is desired, enable the "Auto Register Pick" option on the Device Configuration.

The option should likely not be used if users are simply taking breaks and intend to come back to the document or might not have dropped the items off at their final location.

### 13.3.8 Override Blank Bins

Sometimes a Pick line can be generated without a suggested Bin to pick from. In these cases, the "Change Bin" menu option can be used to update to an appropriate one as identified by the user. However, if efficiency is of critical importance the "Take Bin

Handling" option on the Device Configuration can be set to "Overwrite if Blank". In which case users can select the line, scan the Bin to take from and the blank bin will be automatically changed to match.

### 13.3.9 Wave Picking

Warehouse Insight does not have any built-in mechanisms for generating Pick documents. Instead, if wave picking is required the Pick documents must be created in Business Central (typically via the Pick Worksheet) and then optionally pre-assigned to users.

### 13.3.10 Pick Sorting

Often, it's desirable to sort the Pick documents by some criteria (typically Bin or Zone). Warehouse Insight supports two methods of sorting the Pick documents.

First, users can utilize the Grid sorting methods (clicking of a column to sort ascending or descending). This sort method will be maintained for all Picks going forward or until cleared by the user. However, the sort is limited to a single column and based on a text-based sort.

The second option is to use the Business Central "Sorting Method" on the Pick document. Any sorting method applied there will be respected on the devices as well (but can be overridden by a user defined column sort).

### 13.3.11 Update Shipment Tracking Information

If the Device Configuration "Update Shipment on Pick" option is enabled, then any tracking information entered by the user will be automatically added to the corresponding Shipment document. This is often required when the user performing the pick is also the user shipping the items and no additional scanning is desired. If enabled, the shipping process can be as simple opening the shipment and hitting post, posting from Business Central or even extending the Pick registration to post the Shipment at the same time.

If the option is not enabled, then users would typically after posting the Pick then open the Warehouse Shipment document and rescan the items. See "Shipping" for more information.

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# 14 Shipping

The “Ship” application is responsible for handling outbound transactions. Supported outbound transactions are:

- Sales Orders
- Transfer Orders
- Warehouse Shipments

Core features of this application include:

- Lookup Lists for Outbound Transactions
- Specifying Quantity to Ship
  - Including Item Tracking information
- Posting

You can access the Shipping application from the Home screen by clicking the “Ship” link.




When launched the Shipping Lookup List page will be displayed.

---

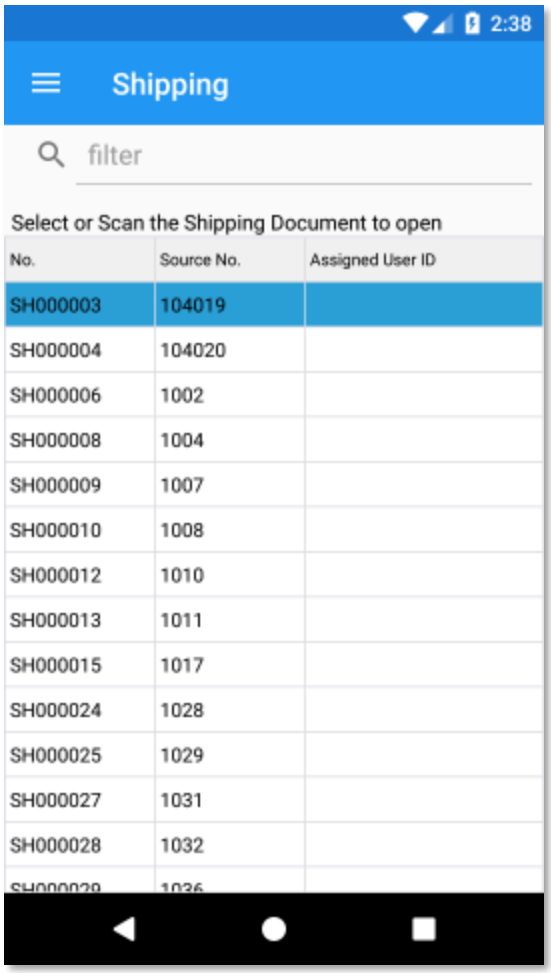
***Note:*** *This document will describe processes specific to Warehouse Shipments. Sales/Transfer Order handling is almost identical and has been left out. For specific differences or questions please contact support.*

---

## 14.1 Shipping Lookup List

The Lookup List page allows you to either scan or select the Shipping Document you wish to view.

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***Configuration:*** *The maximum number of Documents that appear in this list is configured in the Warehouse Insight Setup page via the "Document Max List" property (defaults initially to 100).*

Use the filter bar to filter the lookup list to specific Documents if required.

The Shipping Lookup List can be filtered by typing into the Search Filter. The following data is supported for searching:

- Document Number
  - Shipping Documents that have a No. matching the filter will be displayed
- External Document No.
  - Documents that have an External Document No. matching the filter will be displayed
- Source No.
  - Any Warehouse Shipments that have a "Source No." (Sales Order, Transfer Order or Assembly) on the lines that match the filter will be displayed

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By default, only "Released" shipping documents are shown. However, you may toggle this to show "Open" documents as well by setting the "Only Show Released Shipments" option to "No" in the Device Configuration page.

If Logins are enabled only documents that are un-assigned or explicitly assigned to the logged in user will be shown. If you wish to see all documents regardless of assignment the "Show All Documents" option must be checked on the Device Configuration page.



***Extensibility:*** *To further enhance or change the Lookup List logic you will need to override event "SHIPPING::GetDocumentList" (ID: 70002) to implement the required logic.*

### 14.1.1 Shipping Lookup List Columns

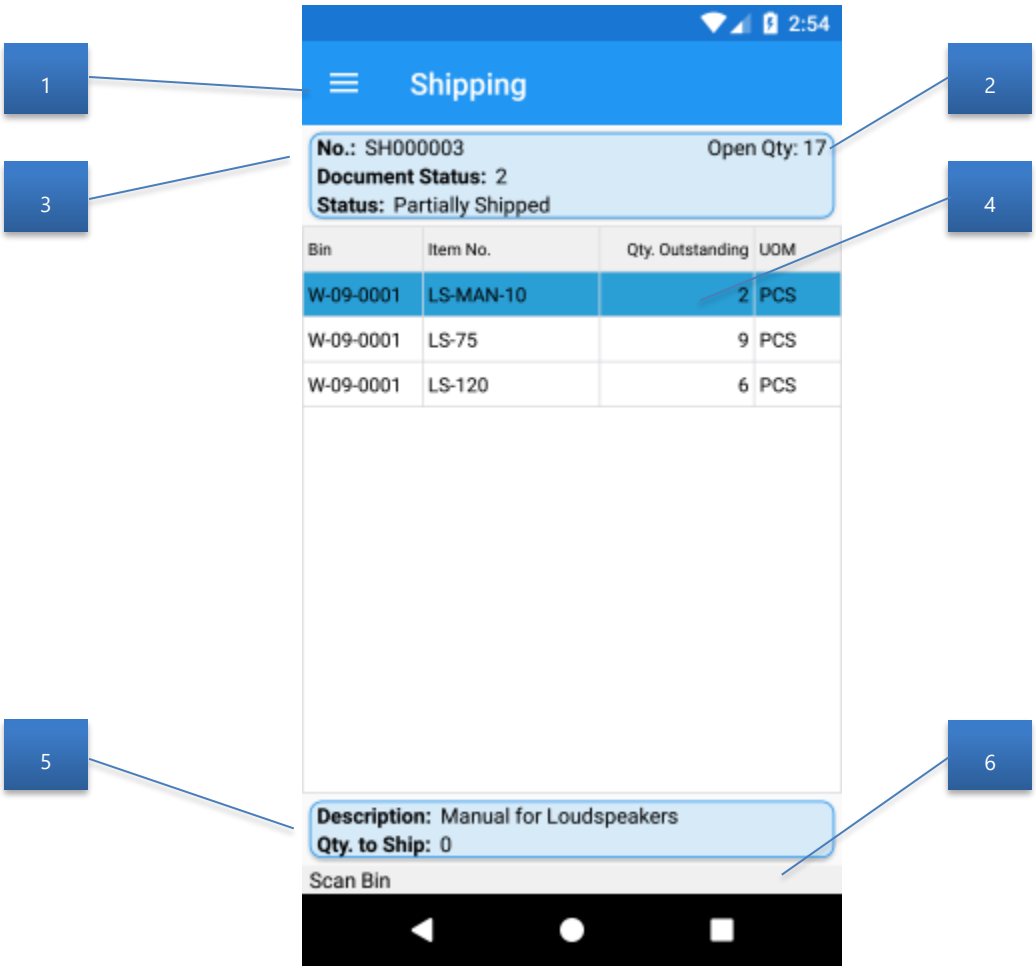
The Shipping Lookup List can show the following columns.

| Column | Description |
|---|---|
| No. | This will either be the Sales Order, Transfer Order, Assembly Order or Warehouse Shipment number. If the Device Configuration Card is set to "Use Source Doc." and using Warehouse Shipments this column will always be the Sales Order, Transfer Order or Assembly Order number. The Warehouse Shipment number can instead be reference in the "Doc #" column if needed. |
| Document No. | This will either be the Sales Order, Transfer Order or Warehouse Shipment number. |
| Assigned User ID | The User ID the document is assigned to. |
| Due Date | The data the document is due by:<br>• Warehouse Shipment Line ->Due Date<br>• Sales Header -> Due Date<br>• Transfer Header -> Shipment Date |
| Reference No. | • Warehouse Shipment Header -> External Document No.<br>• Purchase Header -> External Document No.<br>• Transfer Header -> External Document No. |
| Source No. | The source document for the Warehouse Shipment. For locations not using Warehouse Shipments this column will always be blank. |
| Customer Name | The Sell-to Customer Name. For Transfer Orders this column will always be empty. |
| Barcode | The generated barcode that will be used if a line is selected. This column does not usually need to be shown. |

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## 14.2 Shipment Document

When your location requires Warehouse Shipments the Shipping application page will look like so:




| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Post<br>• Print<br>• Change Quantity<br>• Enter Bin<br>• Enter Item<br>• Enter License Plate<br>• Start/Stop License Plate<br>• Hide/Show Completed<br>• Item Inquiry<br>• Bin Inquiry |

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| | |
|---|---|
| 2 | The Total Remaining Quantity or Lines to ship for the document |
| 3 | Document number and related header information |
| 4 | The Document Lines |
| 5 | Quantity to Ship, Description and other Line details |
| 6 | Status bar indicating status messages or instructions |



***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the events "SHIPPING::GetSalesOrder" (ID: 70000), "SHIPPING::GetWhseShipment" (ID: 70005) and "SHIPPING::GetTransferOrder" (ID: 70011).*



***Note:*** *If you have Logins enabled on the handheld the Shipment when opened may be automatically assigned to the user logged depending on the Device Configuration setting: "Assign Document".*

### 14.2.1 Shipping Items

The standard process flow should be used when shipping Items:

1. Scan the Bin to ship from
2. Scan the Item to ship
3. Enter the quantity shipped and Item Tracking Information (if required)

See General Document Handling for more information.

However, most often when using Warehouse Shipments items are always shipped from a common Bin. If this is the case it makes sense to not require users to scan the Bin to Ship from as there is little chance the user will be making a mistake.

To not require scanning bins during Shipping the "Ignore Bins" option should be checked on the Device Configuration page. If done so then the processes will instead be:

1. Scan the Item to ship
2. Enter the quantity shipped and Item Tracking Information (if required)

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure to ship.

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***Configuration:*** *Since Warehouse Shipments typically only Ship from a single Bin it is often beneficial to hide the "Bin" column to save view space on the device.*

## 14.2.2 Menus

The following menus are available by default for Shipping. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "WHSE_SHIPMENT_DOC", "SALES_OUT_DOC" or "TRANSFER_OUT_DOC" for the Application.

### *14.2.2.1 Close (Menu)*

Closes the Shipping Document and brings the user back to the Lookup List page.

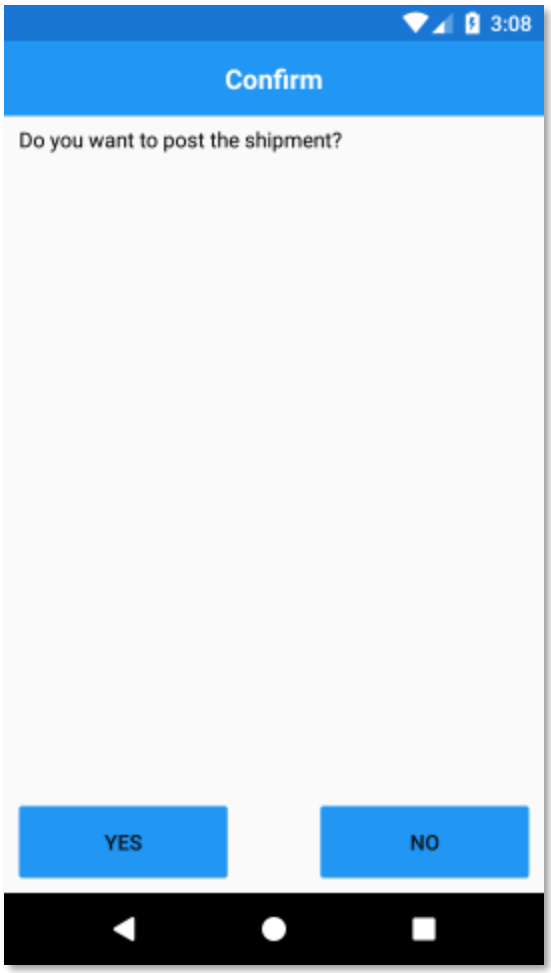
If a License Plate is currently being built the user will be prompted to print the label.

If auto post is enabled, then the document will be posted prior to closing.

### *14.2.2.2 Post (Menu)*

Post the Shipping Document. Users will be prompted to confirm that the post should occur.

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After posting of the document is complete the page will be closed, and the user brought back to the Lookup List page.

---

***Extensibility:*** *To extend or customize the post routine (Post + Print, etc.) you will need to override events: "SHIPPING::PostSalesOrder" (ID: 70004), "SHIPPING::PostWhseShipment" (ID: 70008) or "SHIPPING::PostTransferOrder" (ID: 70013).*

---

#### *14.2.2.3 Print (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Sends a request to print any configured report(s). You can configure which reports are printed in the IWX Report Selections with the "Whse. Shipment", "Sales Order" or "Transfer Order" usage.

By default, the reports must be built with a top level DataItem of the type of document being printed. Example: Report "Whse. - Shipment" (ID: 7317) if printing a Warehouse Shipment.

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#### 14.2.2.4 *Change Quantity (Menu)*

Launches the Quantity dialog for the selected line.

#### 14.2.2.5 *Enter Bin (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Bin that they wish to simulate scanning.

This option can be useful if Bin labels have become damaged or are inaccessible.



***Note:*** *It is usually more advisable to open the Bin Inquiry module (see menu options) and reprint the label.*

#### 14.2.2.6 *Enter Item (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Item that they wish to simulate scanning.

This option can be useful if Item labels have become damaged or are no longer readable.

#### 14.2.2.7 *Enter License Plate (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the License Plate number they wish to simulate scanning.

***Note:*** *License Plate labels can be reprinted via the License Plate module on the handhelds but will require exiting the application.*

#### 14.2.2.8 *Start/Stop License Plating (Menu)*

Will initiate a process flow in which Items are shipped and added to a License Plate.

See Building a License Plate for more information.

#### 14.2.2.9 *Hide/Show Completed (Menu)*

Toggles whether the received lines (those without Outstanding Quantity) are shown or hidden.



***Note:*** *The state of this menu option is saved when the application closes so that next time a Shipment document is opened the hide/show state last used will be applied.*

#### 14.2.2.10 *Item Inquiry (Menu)*

Launches the Item Inquiry management screen pre-filtered to the selected line.

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#### *14.2.2.11 Bin Inquiry (Menu)*

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

## 14.3 Common Configurations and Requests

This section is intended to describe the most common scenarios, requests and features concerning Shipping. These topics should apply the same to all document types (Sales Orders, Transfer Orders, Whse. Shipments). While some topics may require development or customizations they are included here in order to provide a greater understanding of what the software is capable of.

Further information may be obtained from the Support Portal.

### 14.3.1 Ignoring Bins

You may ignore Bins during the Shipping process by enabling the "Ignore Bins" option on the Device Configuration page. This is mostly applicable when using Warehouse Shipments but can also be beneficial when using Sales Orders or Transfer Orders and the Bins do not need to be validated.

### 14.3.2 Card View

By default, the document screens are shown in "Grid" mode. This allows a user to see all expected Shipping lines and scroll through them. If you wish to limit the display to a single line at a time you may switch the "Display Mode" to "Card View" on the Device Configuration page.

In "Card View" the display will change to appear similar to this:

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Users may still cycle through the lines by pressing the "Previous" and "Next" buttons.

Scanning an Item will find the appropriate line and advance the view to that line as needed (E.g. users do not need to scan the item currently shown on the screen).

---

***Note:*** *The data displayed in the "Card" is based on the Device Columns visibility. To show/hide fields you may do so by configuring the Device Columns for the appropriate document event.*

---

### 14.3.3 Building a License Plate

If required a License Plate may be built up during the Shipping process using the steps outline in Building a License Plate.

---

***Note:*** *The Shipment lines do not need to all come from the same Bin. The first Bin shipped from will be set on the License Plate.*

---

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### 14.3.4 Using a License Plate

If required a License Plate that has been previously built can be scanned to Ship. See Using a License Plate for more information.



***Note:*** *The Shipment lines must all have the same bin and match the License Plate Bin. It is not currently possible to ship a License Plate across multiple Bins.*

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# 15 Production Order Consumption

The “Consumption” application allows users to record Consumption against Production Orders.

Core features of this application include:

- Lookup Lists for Production Orders
    - Broken down by Item Tracking if required
- Recording consumption against specific produced Lot/Serial numbers
- Options around BOM enforcement
- Posting

You can access the Consumption application from the Home screen by clicking the “Consumption” link.

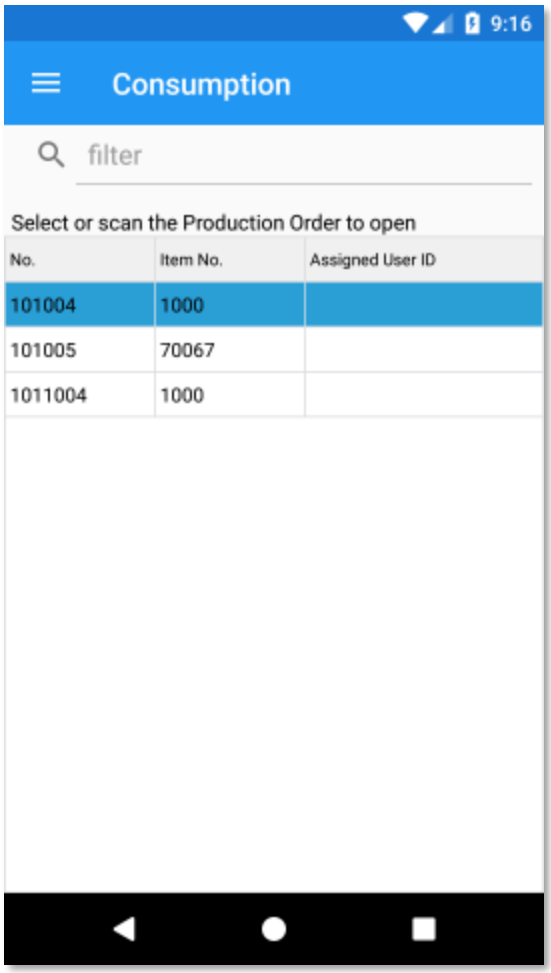



When launched the Consumption Lookup List page will be displayed.

## 15.1 Consumption Lookup List

The Lookup List page allows you to either scan or select the Production Order you wish to view.

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Use the filter bar to filter the lookup list to specific Production Orders if required.

The Consumption Lookup List can be filtered by typing into the Search Filter. The following data is supported for searching:

- Document Number
  - Production Orders that have a No. matching the filter will be displayed

---

***Configuration:*** *The Lookup List can be grouped by Lot/Serial number by setting the Device Configuration option "List Per Tracking Line" to true.*

---

If Logins are enabled only documents that are un-assigned or explicitly assigned to the logged in user will be shown. If you wish to see all documents regardless of assignment the "Show All Documents" option must be checked on the Device Configuration page.

---

***Extensibility:*** *To further enhance or change the Lookup List logic you will need to override event "PRODUCTION::GetDocumentList" (ID: 40006) to implement the required*

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*logic. The lookup list event is also used for Production Output so care should be taken when modifying.*

### 15.1.1 Consumption Lookup List Columns

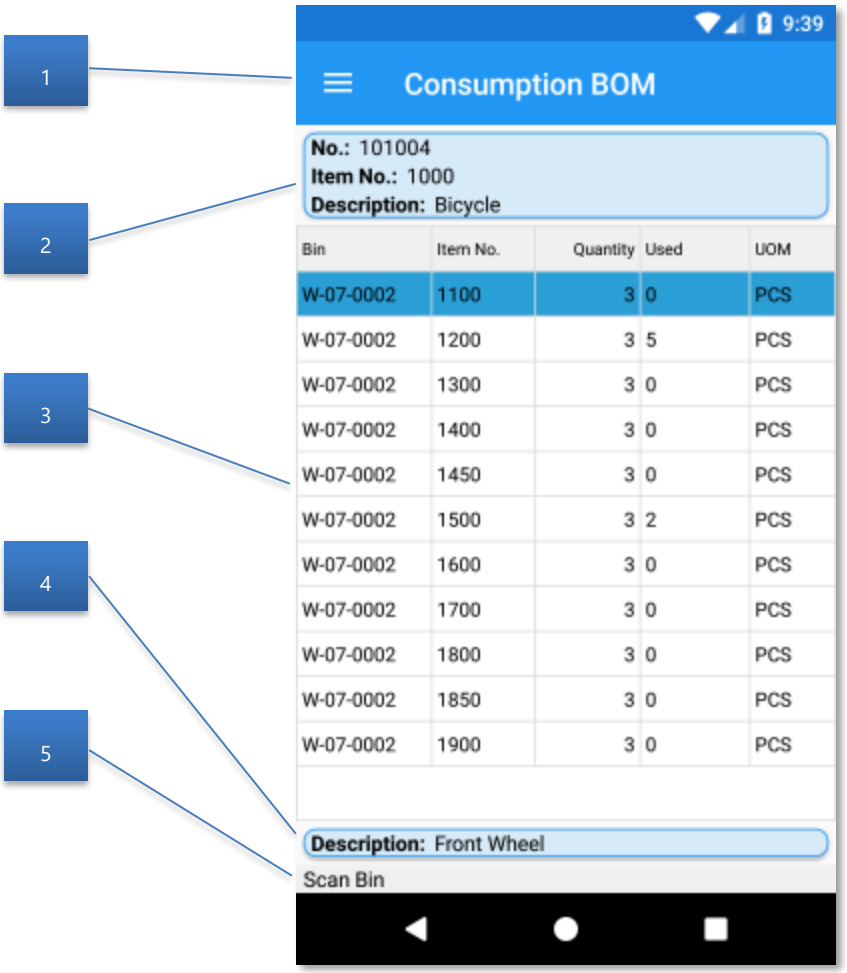
The Consumption Lookup List can show the following columns.

| Column | Description |
|---|---|
| No. | The Production Order number. |
| Line No. | The Production Order Line number. |
| Item No. | The Production Order Line number |
| Lot No. | The Production Order Lot number (if "List Per Tracking Line" enabled) |
| Serial No. | The Production Order Serial number (if "List Per Tracking Line" enabled) |
| Assigned User ID | The User ID the document is assigned to. |
| Barcode | The generated barcode that will be used if a line is selected. This column does not usually need to be shown. |

## 15.2 Consumption BOM Document

When a Production Order has been chosen the application page will look like so:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Post<br>• Enter Bin<br>• Enter Item<br>• Show Usage<br>• Item Inquiry<br>• Bin Inquiry |
| 2 | Production Order number and related header information |
| 3 | The Production Order Component Lines (BOM) |
| 4 | Component Line additional details |
| 5 | Status bar indicating status messages or instructions |

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***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event "PRODUCTION::GetBOM" (ID: 40005).*

## 15.2.1 Consuming Items

The standard process flow should be used when consuming Items:

1. Scan the Bin to ship from
2. Scan the Item to ship
3. Enter the quantity consumed and Item Tracking Information (if required)

See General Document Handling for more information.

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure to consume.



***Note:*** *Consumption entries are recorded in the Consumption Entry table temporarily and can be transferred to an appropriate journal at a later time or when Posted.*

## 15.2.2 Menus

The following menus are available by default for Consumption. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "PROD_CONS_BOM" for the Application.

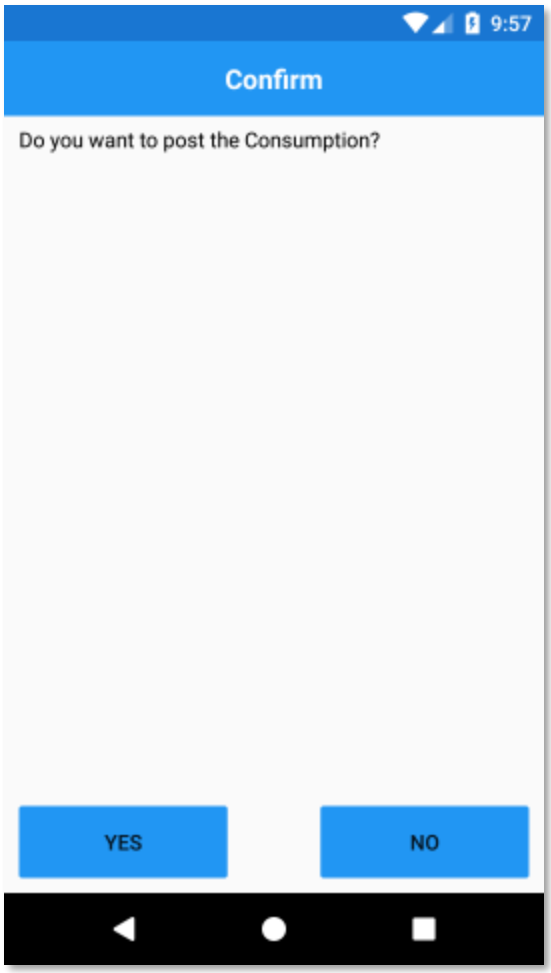
### *15.2.2.1 Close (Menu)*

Closes the Production Order and brings the user back to the Lookup List page.

### *15.2.2.2 Post (Menu)*

Posts the recorded consumption. Users will be prompted to confirm that the post should occur.

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After posting of the consumption is complete the page will be closed, and the user brought back to the Lookup List page.

---

***Configuration:*** *Users may only Post if the "Allow Post" option is enabled in the Device Configuration card. If posting is not enabled the consumption entries will need to be copied/posted in Business Central. See Transferring Consumption Entries for more information.*

---

#### *15.2.2.3 Change Quantity (Menu)*

Launches the Quantity dialog for the selected line.

#### *15.2.2.4 Enter Bin (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Bin that they wish to simulate scanning.

This option can be useful if Bin labels have become damaged or are inaccessible.

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***Note:*** *It is usually more advisable to open the Bin Inquiry module (see menu options) and reprint the label.*

#### 15.2.2.5 *Enter Item (Menu)*

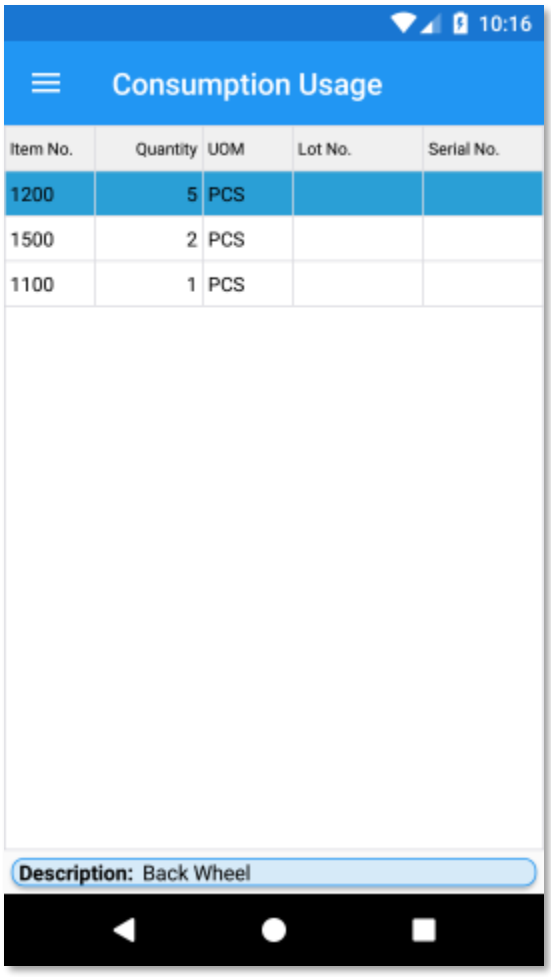
This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Item that they wish to simulate scanning.

This option can be useful if Item labels have become damaged or are no longer readable.

#### 15.2.2.6 *Show Usage (Menu)*

Opens the Consumption Usage page.  Users will be able to modify/delete recorded consumption entries.




***Note:*** *Consumption cannot be recorded on this screen and must be done on the Consumption BOM page.*

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#### 15.2.2.7 *Item Inquiry (Menu)*

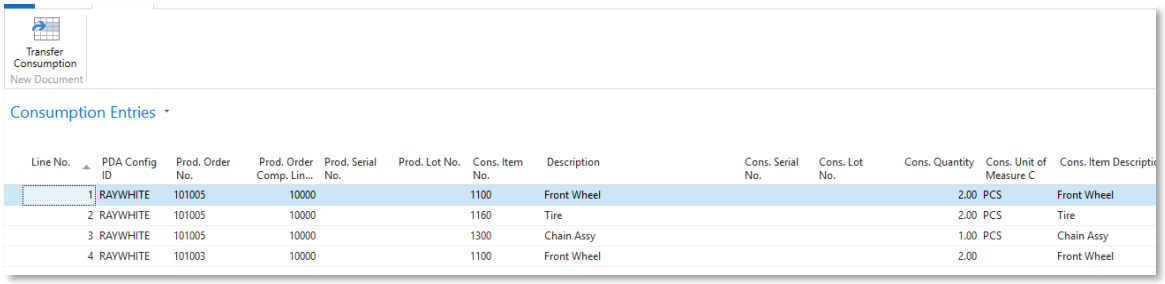
Launches the Item Inquiry management screen pre-filtered to the selected line.

#### 15.2.2.8 *Bin Inquiry (Menu)*

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

## 15.3 Transferring Consumption Entries

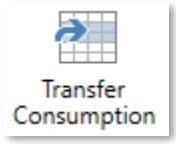
After the devices have recorded consumption against a Production Order the entries will appear in on the "Consumption Entries" page. From this page, the consumption entries can then be transferred to the Consumption Journal for processing/posting after reviewing or when appropriate.




The entries contain all the information captured at time of scanning but can be modified as needed prior to sending to the appropriate consumption journal. When transferred the consumption entries will be added to the Batch Name specified on the entry line.

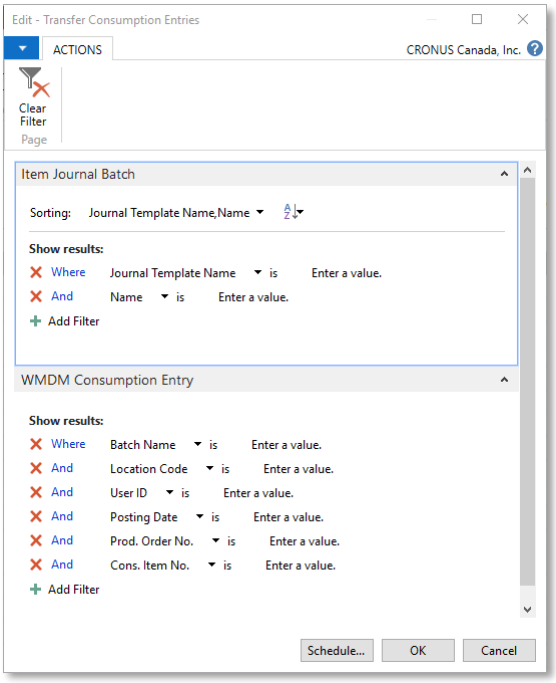
To transfer/post the consumption entries the following steps should be taken:

1. Press the "Transfer Consumption" menu button




2. In the report dialog specify any filters for lines you may want to transfer (certain production orders, specific user entries, etc.). Leave blank to transfer all entries.

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When done open the appropriate Consumption Journal Batch and "Post" the entries.

## 15.4 Common Configurations and Requests

This section is intended to describe the most common scenarios, requests and features concerning Consumption. While some topics may require development or customizations they are included here in order to provide a greater understanding of what the software is capable of.

Further information may be obtained from the Support Portal.

### 15.4.1 BOM Enforcement

The allowed consumption can be validated against the BOM in a variety of ways by setting the "Enforce BOM" option on the Device Configuration page. The available options are:

- No Enforcement
  - Users will be allowed to record consumption for any item and any amount of quantity regardless of the BOM. This is the default option.
- Enforce Item
  - Users will be allowed to over consume any item currently on the BOM. Items not on the BOM will not be allowed to be consumed.
- Enforce Quantity
  - Users will not be allowed to over consume Items. Items not on the BOM will not be allowed to be consumed.

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### 15.4.2 Consuming License Plates

It is not currently possible to consume a License Plate. However, a custom menu could be created, and appropriate logic implemented in order to achieve this, depending on requirements. Contact Customer Support for more information.

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# 16 Production Order Output

The “Output” application allows users to record Output against Production Orders.

Core features of this application include:

- Lookup Lists for Production Orders
- Auto generation of Lot/Serial numbers (if required)
- Label printing for output Items
- Building of License Plates during output
- Posting

You can access the Output application from the Home screen by clicking the “Output” link.

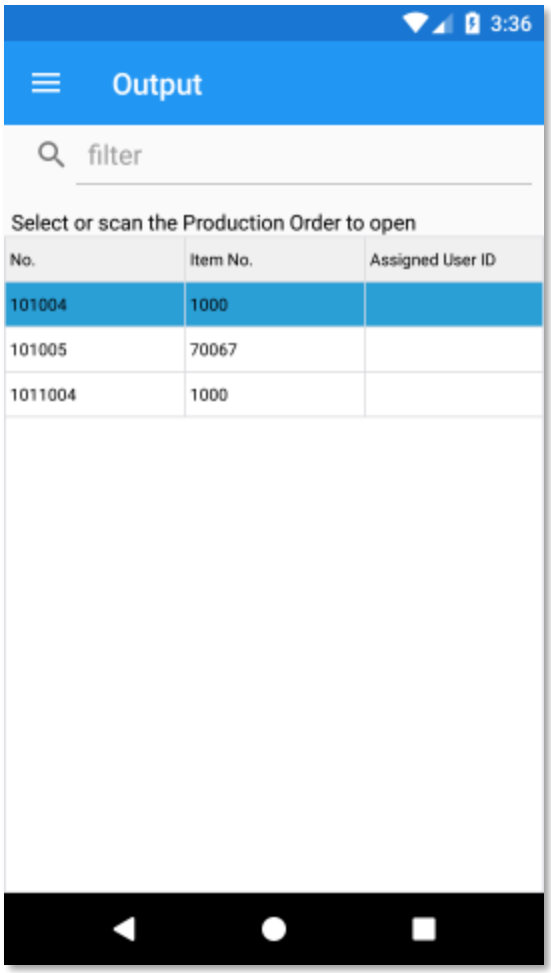



When launched the Output Lookup List page will be displayed.

## 16.1 Output Lookup List

The Lookup List page allows you to either scan or select the Production Order you wish to view.

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Use the filter bar to filter the lookup list to specific Production Orders if required.

The Output Lookup List can be filtered by typing into the Search Filter. The following data is supported for searching:

- Document Number
  - Production Orders that have a No. matching the filter will be displayed

---

***Configuration:*** *The Lookup List can be grouped by Lot/Serial number by setting the Device Configuration option "List Per Tracking Line" to true.*

---

If Logins are enabled only documents that are un-assigned or explicitly assigned to the logged in user will be shown. If you wish to see all documents regardless of assignment the "Show All Documents" option must be checked on the Device Configuration page.

---

***Extensibility:*** *To further enhance or change the Lookup List logic you will need to override event "PRODUCTION::GetDocumentList" (ID: 40006) to implement the required*

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*logic. The lookup list event is also used for Production Output so care should be taken when modifying.*

### 16.1.1 Output Lookup List Columns

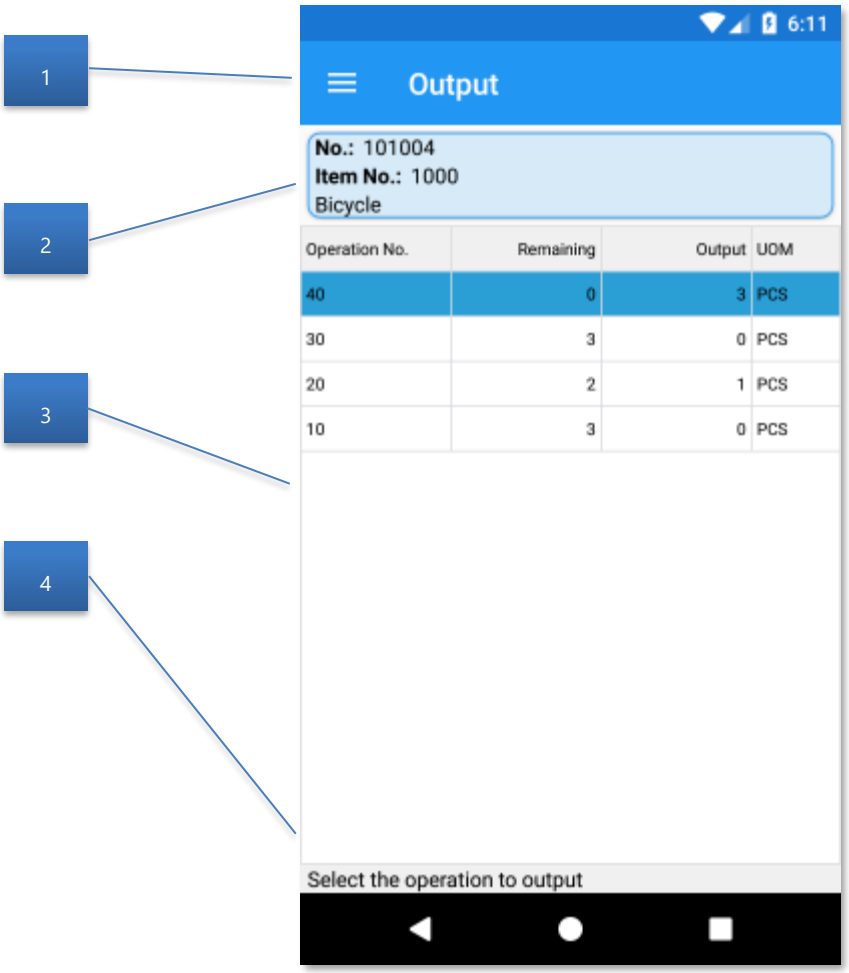
The Output Lookup List can show the following columns.

| Column | Description |
|---|---|
| No. | The Production Order number. |
| Line No. | The Production Order Line number. |
| Item No. | The Production Order Line number |
| Lot No. | The Production Order Lot number (if "List Per Tracking Line" enabled) |
| Serial No. | The Production Order Serial number (if "List Per Tracking Line" enabled) |
| Assigned User ID | The User ID the document is assigned to. |
| Barcode | The generated barcode that will be used if a line is selected. This column does not usually need to be shown. |

## 16.2 Output Document

When a Production Order has been chosen the application page will look like so:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Output<br>• Start/Stop License Plate |
| 2 | Production Order number and related header information |
| 3 | The Production Order Routing Lines (Operations) |
| 4 | Status bar indicating status messages or instructions |

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***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event "PRODUCTION::GetOutput" (ID: 40007).*

### 16.2.1 Outputting Items

The process flow should be used when outputting Items:

1. Select the Operation to output
2. Select the Output menu action
3. Enter the quantity to Output and Item Tracking Information (if required)

See General Document Handling for more information.

The Scan Behaviors page can also be further configured to control aspects of this process as well.

***Note:*** *Only the last Operation will create inventory. Other operations may be used to track progress.*

### 16.2.2 Menus

The following menus are available by default for Output. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "PROD_OUTPUT_DOC" for the Application.

#### *16.2.2.1 Close (Menu)*

Closes the Production Order and brings the user back to the Lookup List page.

#### *16.2.2.2 Output (Menu)*

Launches the Quantity dialog for the selected operation.

#### *16.2.2.3 Start/Stop License Plating (Menu)*

Will initiate a process flow in which Items when Output are added to a License Plate.

## 16.3 Common Configurations and Requests

This section is intended to describe the most common scenarios, requests and features concerning Output. While some topics may require development or customizations, they are included here in order to provide a greater understanding of what the software is capable of.

Further information may be obtained from the Support Portal.

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### 16.3.1 Limiting Last Operation

By default, all Operations are shown. This will all allow users to record output against preceding steps which can be useful when tracking the progress of the order or flushing linked components. However, if desired the Operation list can be limited to the only the final Operation by checking the "Only Show Last Operation" option in the Device Configuration card.

### 16.3.2 Auto-Generation of Lot/Serial Numbers

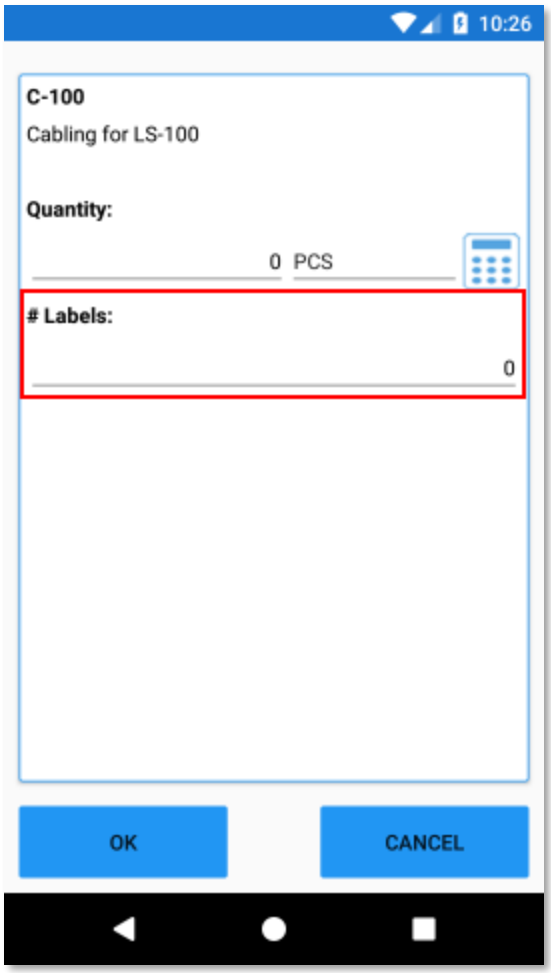
If the outputted Item requires Item Tracking, you may have the system auto-assign an appropriate tracking number when the quantity dialog is displayed. To do so you will need to enable the "Auto Generate Lot/Serial Numbers" option on the Device Configuration page. For this option to work the Item must be configured with an appropriate "Serial Nos." or "Lot Nos." defined.

### 16.3.3 Printing Item Labels

If you would like to print labels after a user has entered a quantity to output, you may enable the "Auto Print on Output" option on the Device Configuration page. This will send to the label report the output particulars (Item, lot/serial number, expiration date, quantity).

If this option is enabled the Quantity dialog will automatically include an additional field or number of labels to be printed, as shown in the screenshot below.

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For most cases the report to be printed must be configured in the IWX Report Selections page with the "Item Label" usage.

The software provides a sample report that can be used as a reference for printing item labels (report "WMDM Item Barcode Label", ID: 23044511). If designing your own label report, it may be worth reviewing the internal structure of this report as it is designed to work in a variety of printing scenarios (Business Central, Item Inquiry, Receiving, Output).

### 16.3.4 Capturing Scrap and Other Information

If additional information is required at time of output (Scrap, run/setup time, etc.) this information can be captured by utilizing the Quantity Extensions framework or custom menus.

---

***Note:*** *Note this will require additional development. For further assistance contact support.*

---

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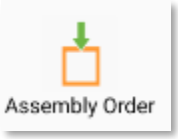
# 17 Assembly Orders

The “Assembly Order” application is responsible for processing mainly “Assemble to Stock” orders with limited support for “Assemble to Order” documents.

Core features of this application include:

- Lookup List for Released Assembly Orders
- Entering quantity and tracking details for consumed items
- Output/Posting of assembled items

You can access the Assembly Order application from the Home screen by clicking the “Assembly Order” link.

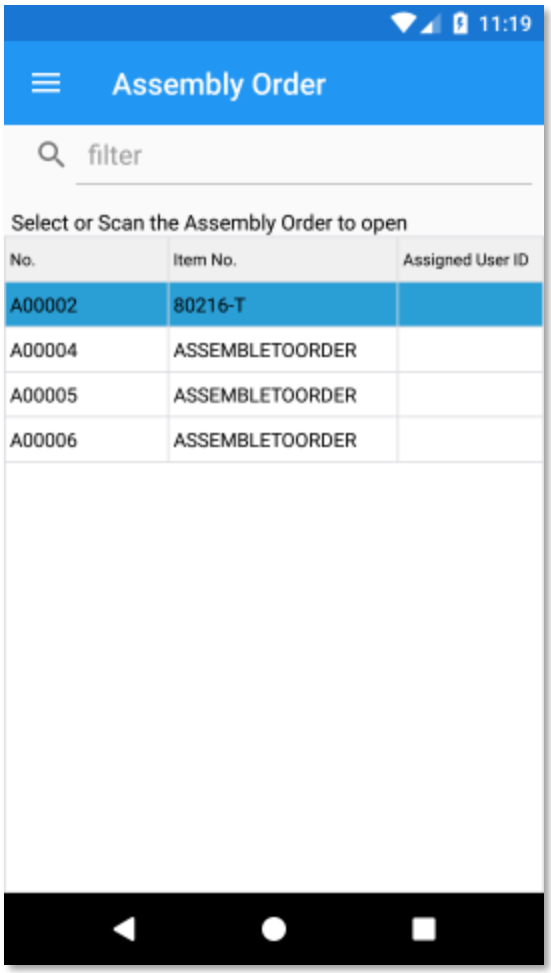



When launched the Shipping Lookup List page will be displayed.

## 17.1 Assembly Order Lookup List

The Lookup List page allows you to either scan or select the Assembly Order you wish to view.

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***Configuration:*** *The maximum number of Documents that appear in this list is configured in the Warehouse Insight Setup page via the "Document Max List" property (defaults initially to 100).*

Use the filter bar to filter the lookup list to specific Documents if required.

The Assembly Order Lookup List can be filtered by typing into the Search Filter. The following data is supported for searching:

- Document Number
  - Receiving Documents that have a No. matching the filter will be displayed

By default, only "Released" Assembly Orders are shown. However, you may toggle this to show "Open" documents as well by setting the "Show All Documents" option to "Yes" in the Device Configuration page.

If Logins are enabled only documents that are un-assigned or explicitly assigned to the logged in user will be shown. If you wish to see all documents regardless of assignment the "Show All Documents" option must be checked on the Device Configuration page.

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***Extensibility:*** *To further enhance or change the Lookup List logic you will need to override event "ASSEMBLY::GetDocList" (ID: 97200) to implement the required logic.*

### 17.1.1 Assembly Order Lookup List Columns

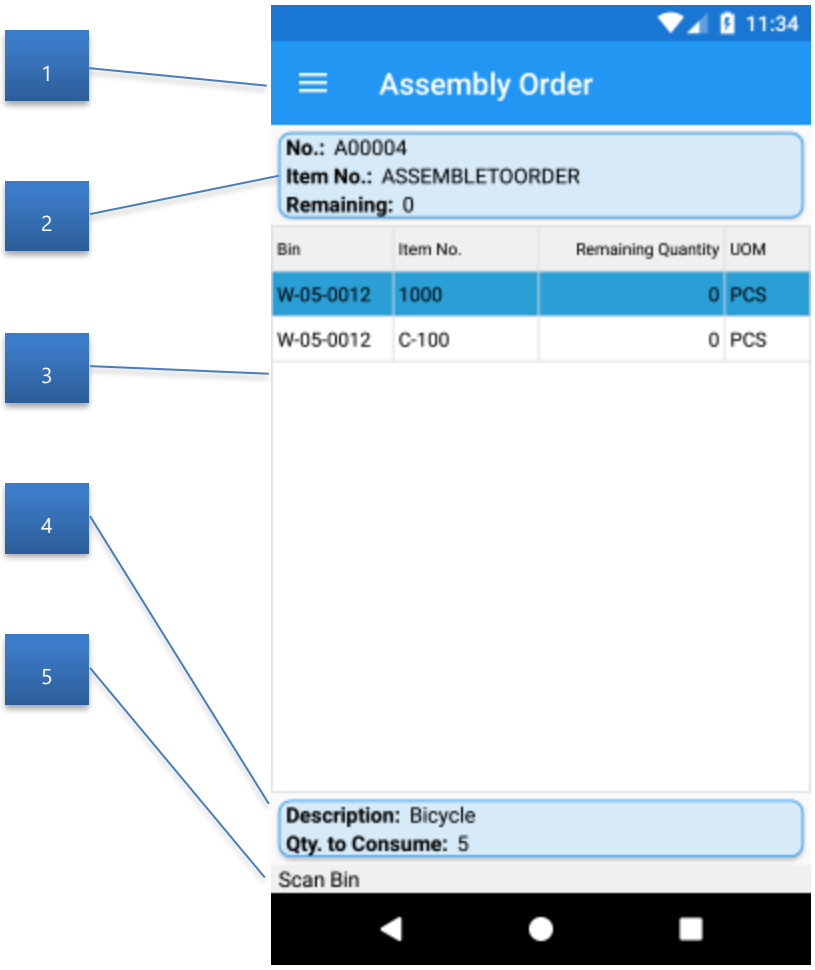
The Assembly Order Lookup List can show the following columns.

| Column | Description |
|---|---|
| No. | The Assembly Order number. |
| Description | The Assembly Order description. |
| Assigned User ID | The User ID the document is assigned to. |
| Due Date | The date the order is due by. |
| Item No. | The Item number being assembled. |

## 17.2 Assembly Order

When an Assembly Order is chosen the following page will be displayed:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Output<br>• Change Quantity<br>• Enter Bin<br>• Enter Item<br>• Item Inquiry<br>• Bin Inquiry |
| 2 | Assembly Order number and related header information |
| 3 | The Assembly Lines for the document |
| 4 | The consumed quantity and other line details |
| 5 | Status bar indicating status messages or instructions |

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***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event "ASSEMBLY::GetDocument" (ID: 97201).*

***Note:*** *If you have Logins enabled on the handheld the Assembly Order when opened may be automatically assigned to the user logged depending on the Device Configuration setting: "Assign Document".*

### 17.2.1 Consuming Items

The standard process flow should be used when consuming items on an Assembly Order:

1. Scan Bin to Consume from
2. Scan the Item to Consume
3. Enter Quantity to Consume and Item Tracking Information (if required)

See General Document Handling for more information.

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure to consume.

***Note:*** *The quantity being consumed is stored in the "Qty. Picked" column (not the "Qty. to Consume" column.*

### 17.2.2 Menus

The following menus are available by default for Shipping. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "ASSEMBLY_ORDER" for the Application.

#### *17.2.2.1 Close (Menu)*

Closes the Assembly Order and brings the user back to the Lookup List page.

#### *17.2.2.2 Output (Menu)*

Outputs an assembled Item for the Assembly Order. Users will be prompted to enter the number of assembled items to output.

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***Note:*** *The output dialog will not ask for Item Tracking information. The Lot/Serial numbers must already be defined on the Order prior to output.*

If the user has not consumed the required component quantities and error will be displayed indicating the quantity cannot be output. The Posting Date on the Assembly Order will be set to the current data prior to posting.

***Note:*** *The Output menu cannot be used for "Assemble to Order" documents.*

After output is complete the page will be closed, and the user brought back to the Assembly Order lookup screen.

#### *17.2.2.3 Enter Bin (Menu)*

This option is hidden by default but can be made visible via the Device Menus page.

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Users will be prompted to type in the Bin that they wish to simulate scanning.

This option can be useful if Bin labels have become damaged or are inaccessible.

---

***Note:*** *It is usually more advisable to open the Bin Inquiry module (see menu options) and reprint the label.*

---

#### *17.2.2.4 Enter Item (Menu)*

This option his hidden by default but can be made visible via the Device Menus page.

Users will be prompted to type in the Item that they wish to simulate scanning.

This option can be useful if Item labels have become damaged or are no longer readable.

#### *17.2.2.5 Item Inquiry (Menu)*

Launches the Item Inquiry management screen pre-filtered to the header Item.

#### *17.2.2.6 Bin Inquiry (Menu)*

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

## 17.3 Common Configurations and Issues

This section is intended to describe the most common issues and are included here in order to provide a greater understanding of what the software is capable of.

Further information may be obtained from the Support Portal.

### 17.3.1 Printing Labels

Printing labels for Assembled items will require either a custom menu option (Print) or an override to the Output menu (e.g. Post & Print). For assistance with these customizations contact support or consult the Support Portal for tutorials on extensibility.

### 17.3.2 Changing Consumption Bin

If the location requires bins the Bin can be changed by scanning a bin. If the Bin does not match the currently selected line the user will be prompted if they want to change the bin.

Alternately, a menu option may be added to explicitly allow changing of the bin.

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### 17.3.3 Working with Warehouse Picks

Consumption cannot be recorded when use of warehouse picks is enabled. Instead, only "Output" will be supported. Picking/consumption is to be handled via the Picking module.

### 17.3.4 Working with Assemble to Order Documents

Output is not supported when assembling to orders (Business Central will process the output as part of the source document handling, e.g. shipping). However, the document can still be used to gather item tracking details for the consumed components if required.

# 18 License Plates

The “License Plates” application is responsible for managing License Plates independently of any specific document.

Core features of this application include:

- Lookup Lists for License Plates
- Creating new License Plates
- Moving License Plates
- Managing/Adjusting License Plates

You can access the License Plates application from the Home screen by clicking the “License Plate” link.

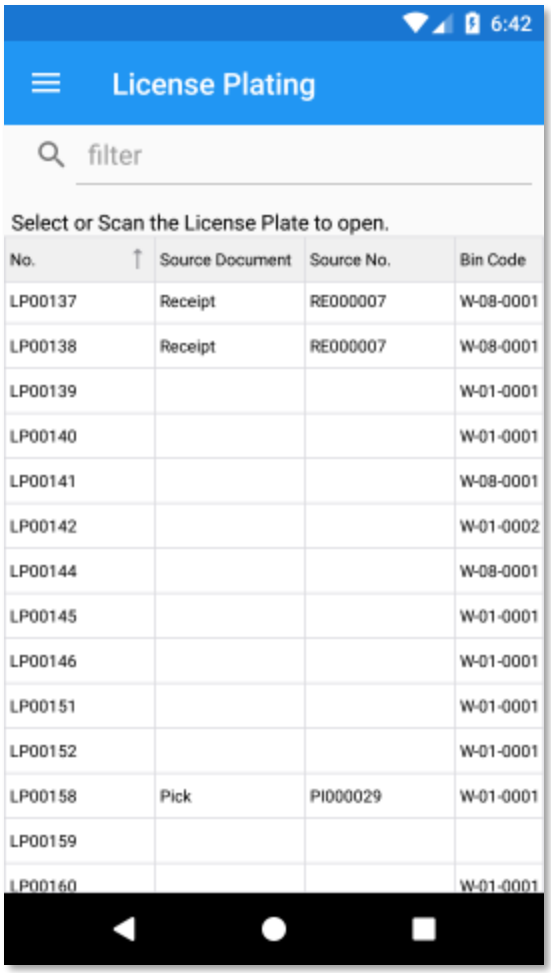



When launched the License Plate Lookup List page will be displayed.

## 18.1 License Plate Lookup List

The Lookup List page allows you to either scan or select the License Plate you wish to view.

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***Configuration:*** *The maximum number of Documents that appear in this list is configured in the Warehouse Insight Setup page via the "Document Max List" property (defaults initially to 100).*

Use the filter bar to filter the lookup list to specific License Plates if required.

***Extensibility:*** *To further enhance or change the Lookup List logic you will need to override event: "LICENSE PLATE::GetDocumentList" (ID: 95007) to implement the required logic.*

### 18.1.1 License Plate Lookup List Columns

The License Plate Lookup List can show the following columns.

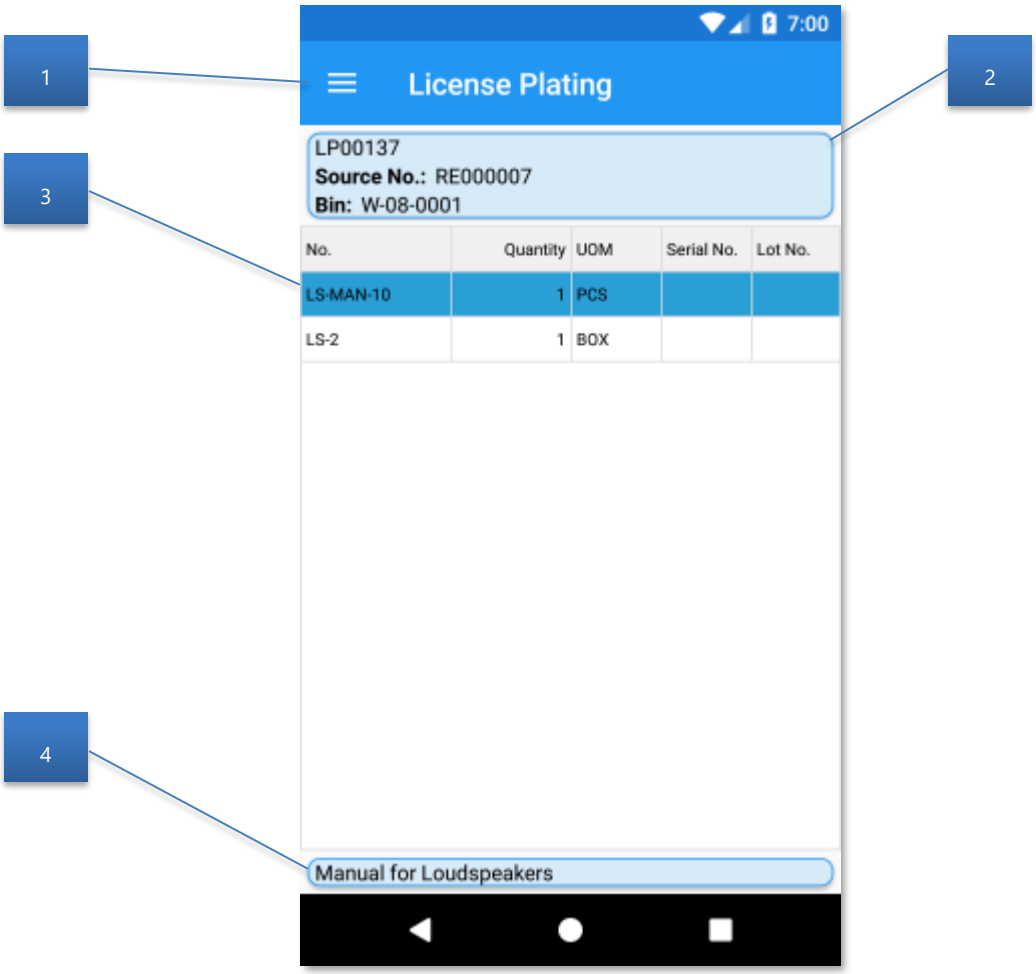
| Column | Description |
|---|---|

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| | |
|---|---|
| No. | This is the License Plate number. |
| Source Document | The type of document the License Plate is currently assigned to. |
| Source No. | The document number the License Plate is currently assigned to. |
| Bin Code | The Bin the License Plate is currently in. |
| Barcode | The generated barcode that will be used if a line is selected. This column does not usually need to be shown. |

## 18.2 License Plate Document

When a License Plate is opened the application page will look like so:




| Callout ID | Description |
|---|---|

| | |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Change Quantity<br>• Delete Line<br>• Transfer<br>• Print<br>• New License Plate<br>• Change Properties<br>• Item Inquiry<br>• Bin Inquiry |
| 2 | Document number and related header information |
| 3 | The License Plate lines |
| 4 | Description and other Line details |



***Extensibility:*** *You may modify the columns shown by modifying the Device Columns for the event "LICENSE PLATE::GetLicensePlate" (ID: 95001).*

### 18.2.1 Adding Items

To add Items to the License Plate the following process should be followed:

1. Scan the Item to add
2. Enter the quantity and Item Tracking Information (if required)

The Scan Behaviors page can also be further configured to control aspects of this process as well. For instance, it is possible to configure it such that a quantity dialog does not ever appear but instead increments the count by one, or to change the default quantity or unit of measure.



***Note:*** *A License Plate cannot have Items added, modified or removed when it is assigned to document.*

### 18.2.2 Menus

The following menus are available by default for License Plating. Menus may be added or removed as required from the Device Menus page under the "Application" Form with a selection of "LP_DOC" for the Application.

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#### 18.2.2.1 *Close (Menu)*

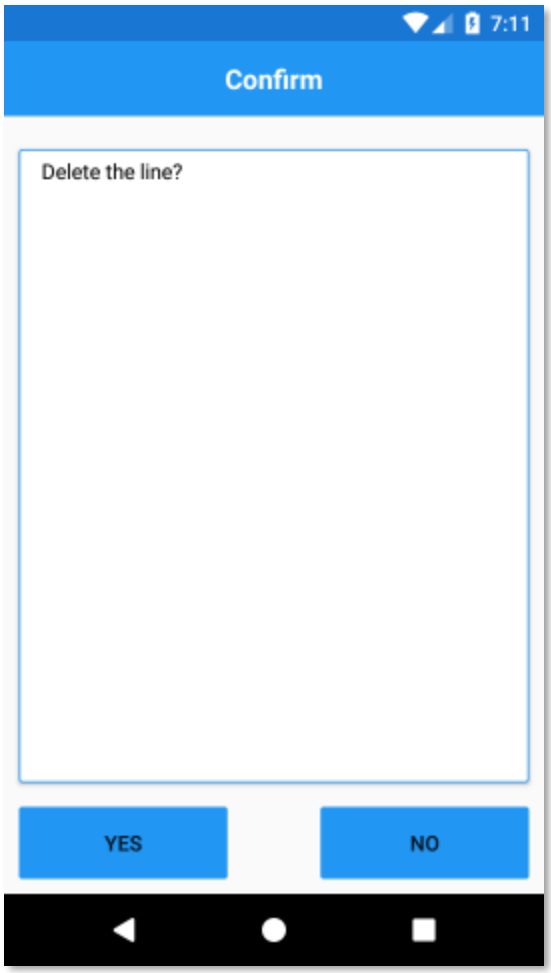
Closes the License Plate document and brings the user back to the Lookup List page.

#### 18.2.2.2 *Change Quantity (Menu)*

Launches the Quantity dialog for the selected line.

#### 18.2.2.3 *Delete Line (Menu)*

Deletes the selected line.  Users will be prompted to confirm the deletion.




#### 18.2.2.4 *Transfer (Menu)*

This menu option will allow users to transfer Items from the current License Plate to another License Plate.

#### 18.2.2.5 *Print (Menu)*

Sends a request to print any configured report(s).  You can configure which reports are printed in the IWX Report Selections with the “LP Label” usage.

By default, the reports must be built with a top level DataItem of the type of document being printed.  Example: Report “WMDM License Plate Label” (ID: 23044512).

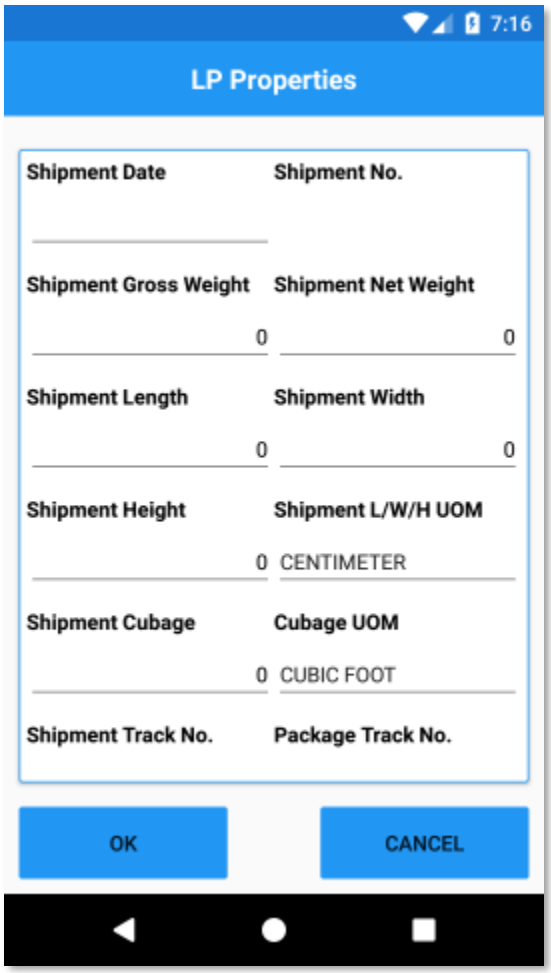
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#### 18.2.2.6 *New License Plate (Menu)*

Creates a new License Plate and is opened automatically. If a label is required it can be printed via the Print menu option.

#### 18.2.2.7 *Change Properties (Menu)*

Allows users to modify some of the License Plate properties. When selected the following screen will be shown:




#### 18.2.2.8 *Item Inquiry (Menu)*

Launches the Item Inquiry management screen pre-filtered to the selected line.

#### 18.2.2.9 *Bin Inquiry (Menu)*

Launches the Bin Inquiry management screen pre-filtered to the active Bin.

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# 19 Scratchpad

The “Scratchpad” application is an “Offline Application” and can be used to gather various information.

Core features of this application include:

- Ability to capture entries for various documents, including counts
- Offline data capture
- Processing of entries in Business Central

You can access the Scratchpad application from the Home screen by clicking the “Scratchpad” link.




When launched the Scratchpad page will be displayed.

---

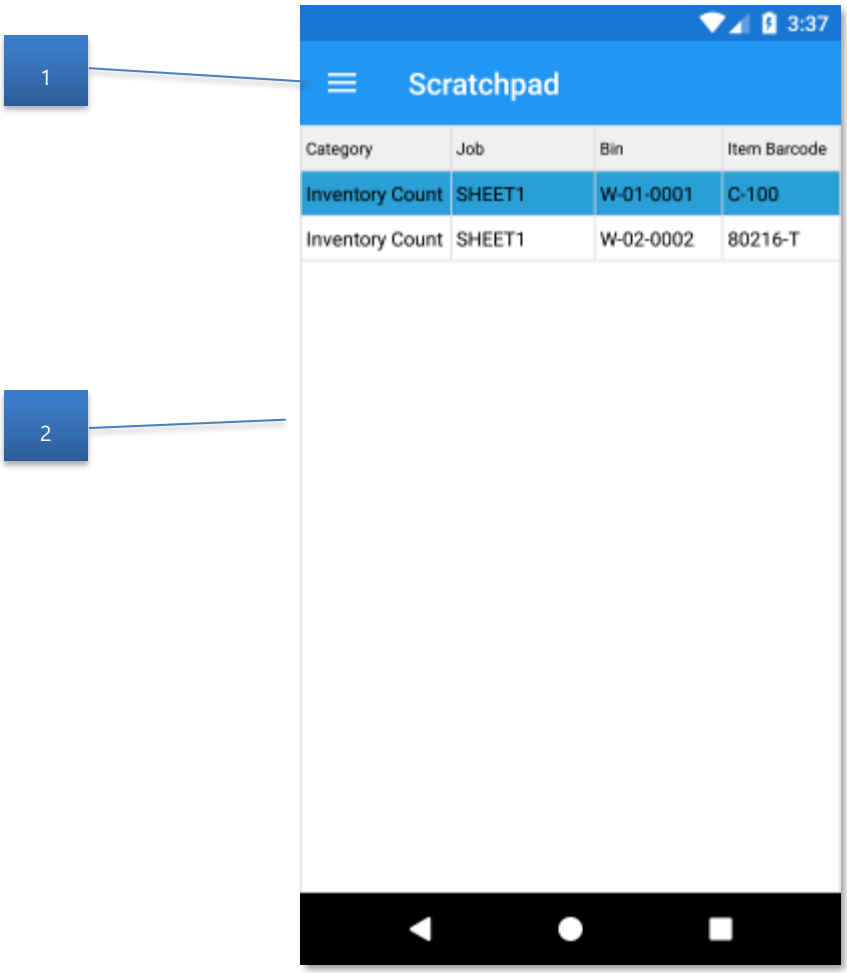
***Note:*** *Further information about Offline Applications may be obtained from the Support Portal.*

---

## 19.1 Scratchpad Document

When the Scratchpad link is pressed the Scratchpad application page will look like so:

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| Callout ID | Description |
|---|---|
| 1 | The available menu options:<br>• Close<br>• Add<br>• Modify<br>• Delete<br>• Send |
| 2 | The currently unsent entries |

***Extensibility:*** *You may modify the columns and behavior by modifying the Offline Application "SCRATCHPAD" in Business Central.*

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### 19.1.1 Menus

The following menus are available for all Offline Applications.

#### *19.1.1.1 Close (Menu)*

Closes the Offline Application and brings the user back to the Main page.

Entries as per all Offline Applications will be save/persisted on the device until sent.

#### *19.1.1.2 Add (Menu)*

Prompts the user to enter data. See Creating Entries for more information.

#### *19.1.1.3 Modify (Menu)*

Allows the user to edit the entry details.

#### *19.1.1.4 Delete (Menu)*

Allows the user to delete the selected entry.

#### *19.1.1.5 Send (Menu)*

Sends the current entries to Business Central to be stored in the "Scratchpad Entries" table.

Once completed the entries will be cleared.

## 19.2 Creating Entries

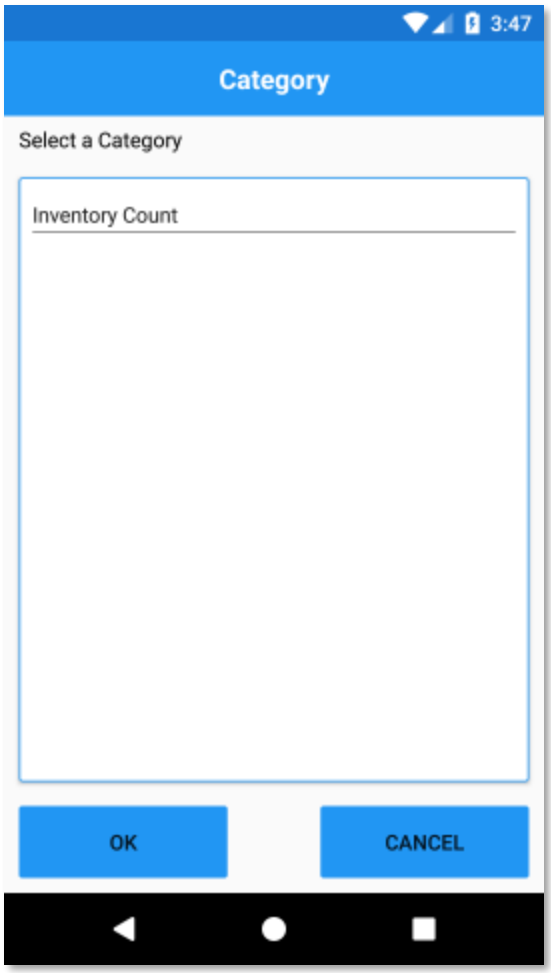
The Scratchpad application follows the standard Offline Applications in that the fields requested/prompted for are configured in the Offline Application definition.

When the user presses the "Add" menu the following dialogs will be presented, in sequence:

1. Category

Allows users to specify the high level category this entry belongs to.

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The configured options are:

- Receiving
- Shipping
- Consumption
- Pick
- Put
- Move
- Other
- Inventory Count

---

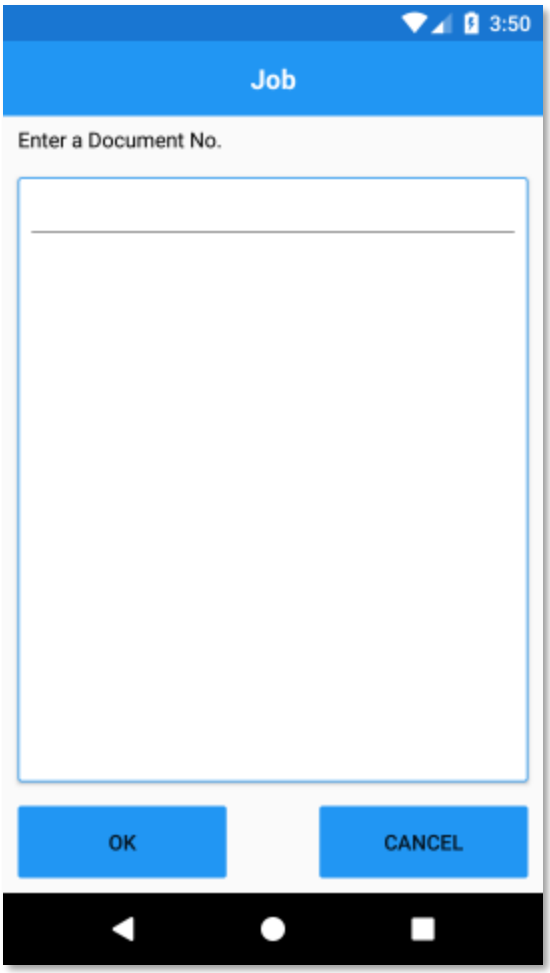
***Note:*** *This dialog will not be show for subsequent entries and instead new entries will retain the previously entered value.*

---

2. Document No.

Allows users to enter the relevant document number these entries belong to.

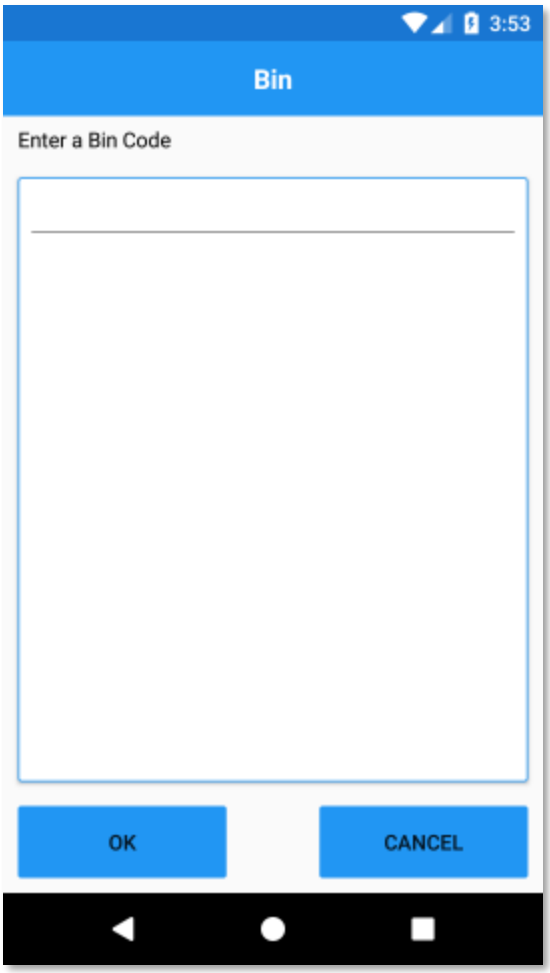
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***Note:*** *This dialog will not be show for subsequent entries and instead new entries will retain the previously entered value.*

3. Bin Code

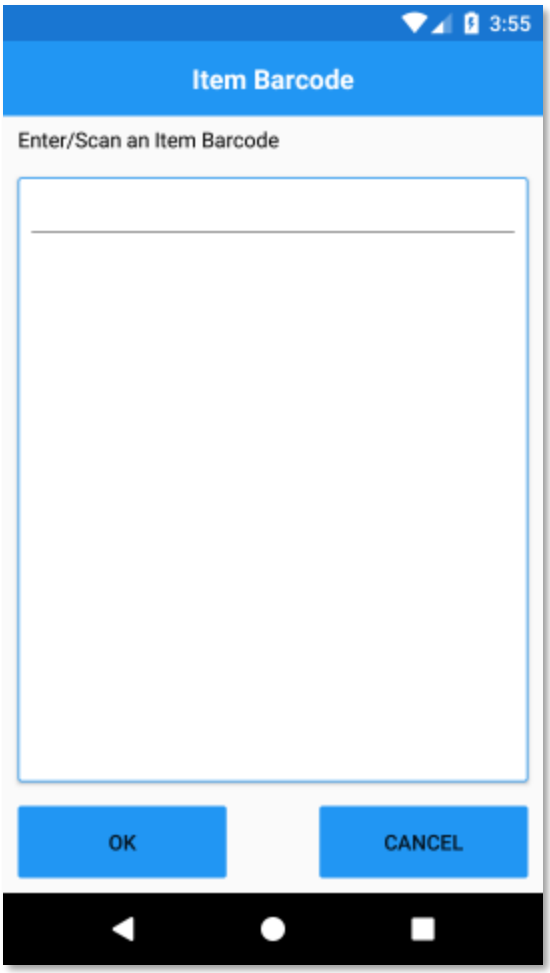
Allows users to enter the Bin for the entry.




4. Item

Allows users to enter the Item for the entry.

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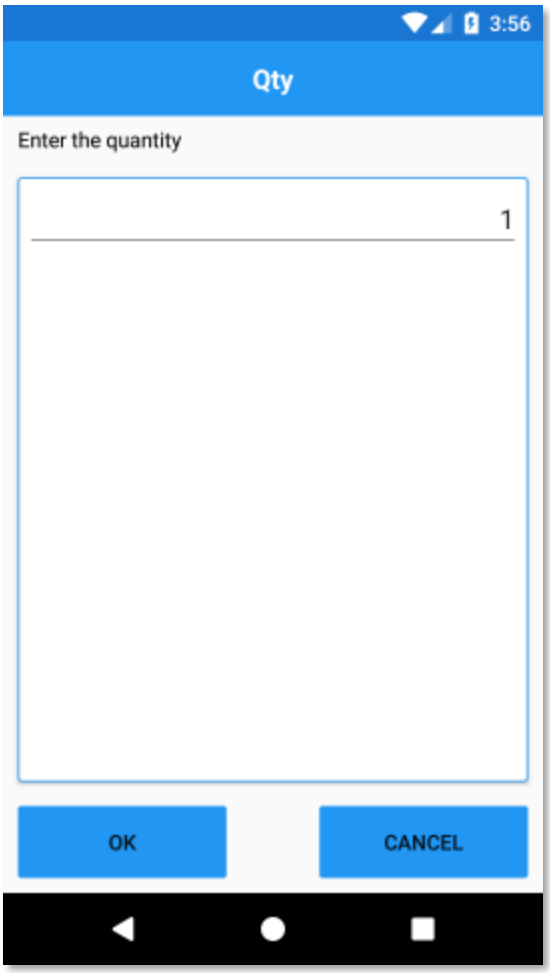



***Note:*** *The entry will be run against the Barcode Rules when the entry is sent.*

5. Quantity

Allows users to enter the Quantity for the entry.

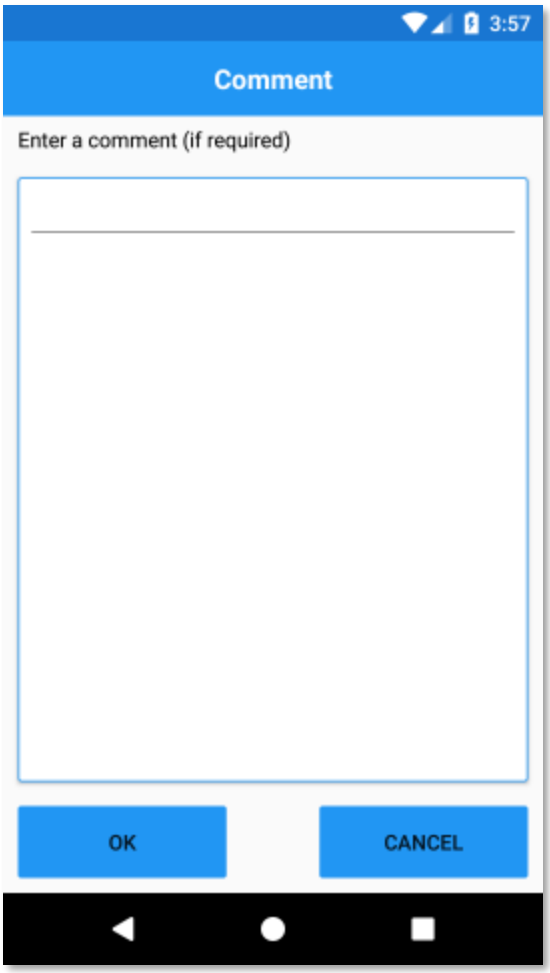
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6. Comment

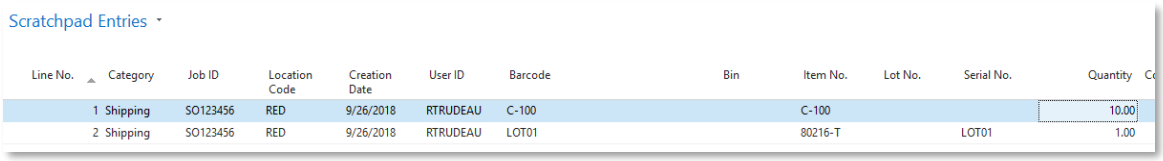
Allows users to enter a Comment for the entry.

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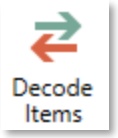

## 19.3 Processing Scratchpad Entries

After the Scratchpad Entries have been sent from the handheld they can be further processed.



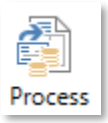

The entries contain all the information present at the time of the scanning. If the "Item No.", "Lot No." or "Serial No." fields are blank but there is a "Barcode" you can use the "Decode Items" menu option to try and determine the missing information from the barcode using the existing barcode rules.

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There are typically two ways to process the scratchpad entries. The first method is to process the entries manually. In this scenario the Business Central user will review each entry and take the appropriate actions. This could mean updating documents to reflect the scans taken, creating new documents as needed or any number of other activities.

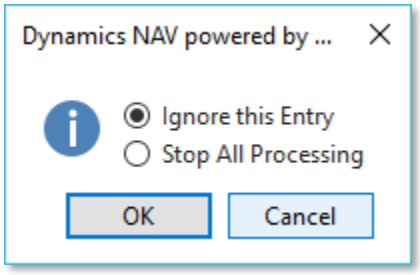
The second method is to utilize the "Process" menu option.




The Process action will attempt to process each entry in the scratchpad. For most entries this entails finding a corresponding document (based on Category and Job ID) and then from there locating a line with a matching Item No.

If a line can be found the quantity to ship/receive/handle will be updated by the amount indicated on the entry and any tracking information set. The exception to this is Inventory Counts where if a matching line cannot be found it will create the entry.

If the scratchpad entry was successfully processed the "State" will be set to "Processed". If the entry cannot be processed a dialog will be displayed to the user asking if processing should continue or stop.




If the "Ignore this Entry" option is selected the entry "State" will be set to "Ignore" and processing will continue.

If the "Stop All Processing" option is selected the entry "State" will be left blank and no further entries will be processed.

---

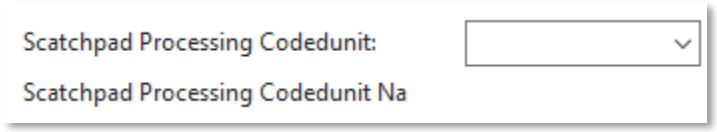
***Note:*** *The Decode Items routine will be automatically run when the Process menu option is pressed.*

---

If the default processing rules are insufficient for your needs, there exists an option to implement your own processing logic. The custom processing logic is defined in a

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codeunit and specified in the Warehouse Insight Setup “Scratchpad Processing Codeunit”.




***Note:*** *More information and examples of creating a custom processing codeunit can be found on the customer Support Portal.*

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