



BellHawk Picking Module User Manual

Introduction

This module provides a unified picking experience for materials handlers in warehouses and stock rooms. This module supports the generation of Pick Orders for Move Tickets, fetching materials for a Work Order Operation from a stock room, and Picking Products from a Warehouse for a customer order.

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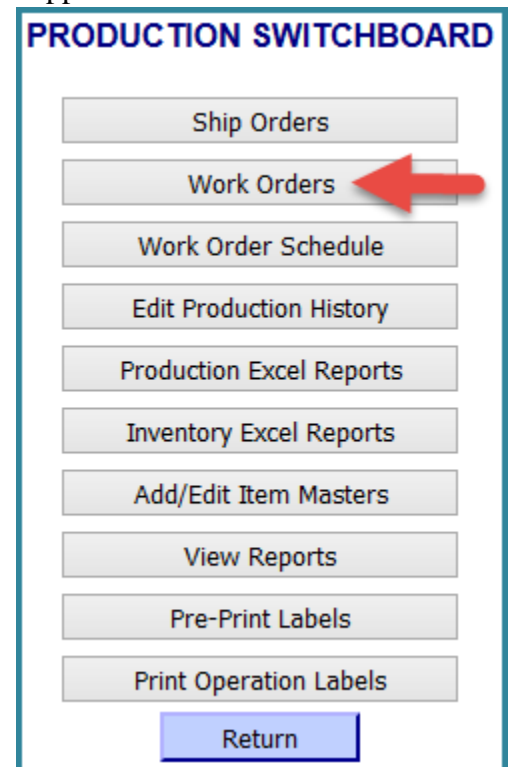
Functions Performed by the Pick Module

The functions of the Pick Module are:

1. To create a barcoded Pick Sheet to pick materials for consumption on a Work Order Step.
2. To create a barcoded Pick Sheet for a Ship Order (with the SO Module).
3. To manually create a barcoded Pick Sheet to move Material from one facility to a location in another facility (Move Ticket).
4. To record the picking of materials for a Move Ticket, Work Order Step, or Ship Order to one or more containers. These containers can then be recorded as being moved to the destination location, consumed on a Work Order step, or shipped.

Creating a Pick Order for Materials Needed for a Work Order Step

This process starts from the Production Switchboard, which is reached from the Main Switchboard. Selecting Work Orders/Work Orders brings up the list of Work Orders, as shown below. From here new Work Orders can be Added or existing Work Orders viewed or edited, using the Edit button for each Work Order.



WORK ORDER LIST										
Work Order Number	Work Order Type	Item Number or Instructions	Quantity on Order	Quantity Complete	Date Released	Date Last Action	Date Wanted	Importance	Status	
BWRK00000001	Processing	SGR6	100	50	Mar 09, 2017	Mar 9 2017 11:15AM	Apr 25, 2017	Standard	Production: Slit Coated Rolls	Edit
BWRK00000002	Processing	SGR6	20000	0	Mar 09, 2017	Mar 9 2017 12:00AM	Apr 24, 2017	Standard	Released	Edit
--Show All--								--Show All--	--Show All--	

Filter Add Work Order Return

Selecting the Edit button, on the above screen, for a specific Work Order, brings up the Work

WORK ORDER DETAIL

Work Order Number:

Work Order Type:

Status: Released

Item Number: ...

Item Description: 6 inch wide Green Coated Roll

Quantity: (feet)

Instructions: (255 char max)

Date Wanted:

Scheduled Start Date:

Customer: ...
Smithfield Printing

Ship Order Number:

Ship Order Line: ...

Importance:

Item is Customer Owned:

Release Work Order

Edit Route

Traveler

Update Work Order

Copy Work Order

Return

Reopen Work Order

Complete Work Order

Cancel Work Order

From the Work Order Detail screen selecting the Edit Route button brings up a list of Route steps as shown here:

WORK ORDER ROUTE EDIT

BWRK00000002

Finished Item: SGR6

6 inch wide Green Coated Roll

	Step #	Step Code	Operation	Work Center	Instructions	
↑	↓	1	1	Slit Coated Rolls	Production	Slit Coated Rolls
						Edit

Add Route Template
--Select a Route Template--

Add Step
Return

From the Work Order Route Edit screen, selecting the route step will bring up the Route Step detail screen, as shown at right.

From here the user can select the Create Pick Order button to create a pick order for the material needed for the Work Order step.

On the resultant Create Pick Order step:

BellHawk will automatically fill in the Work Order Number and the Step (1)

The user can select the Facility (2) from which to fetch the material. This can be useful as you may have multiple warehouses and stock rooms and this enables material handlers or stock room clerks to just to select Pick Orders for their facility.

ROUTE STEP SETUP
BWRK00000002
Finished Item: SGR6
6 inch wide Green Coated Roll

Step 1
 Work Center: Production
 Operation: Slit Coated Rolls
 Instructions: Slit Coated Rolls
 Step Code: 1
 Scheduled Date: 4/24/2017
 Status: Ready

Buttons: Update, Resources, Create Pick Order, View Pick Sheet, Return, Delete Step

CREATE PICK ORDER
For Work Order
 BWRK00000002
 Step Number: 1
 To Location (Optional): Production
 Description (Optional): Order by Joe Smith
 Date Wanted (Optional): 04/24/2017
 Buttons: Create, View, Return

The user can then select the destination Facility (3) and Location (4) within that facility. These will appear on the Pick Sheets as guidance for the material handler. The description (5) and date wanted (6) are optional.

Please note that, if you do not have any Facilities setup in your system then the To and From Facilities will not be requested.

Selecting the Create button (7) will bring up an acknowledgement, as shown here:

Once the user has clicked on OK, the same screen as above will be displayed, except that the View button will no longer be grayed out. Clicking on the View button will bring up the

pick order print screen:


OK. Pick Order successfully generated for:
 BWRK00000001
 OK

PICKING SHEET

Pick Order # P001003
Work Order # BWRK00000001
WO Step Code 1

From Facility
To Facility
To Location
Issued By: Green, Eric

Date Wanted
Description

Item Number / Description	Quantity	Quantity Picked	Quantity To Be Picked
 SGR6 6 inch wide Green Coated Roll <i>Configuration</i>	1000 ft	0 ft	1000 ft

Suggested Location:

Initials: _____

From this screen, the user can print the Picking Sheet (1) to give to a material handler or they can save it as a PDF file (2) and Email it to the warehouse manager (for example) to be picked.

The Kit Picking Sheet itself has a Pick Order Number barcode (3) accompanied by information (4) from the Pick Order creation screen. It also has line item barcodes (5), one for each item to be picked.

On each line is shown the quantity needed for the Work Order step (6) and the quantity already picked, along with the quantity to be picked (7) and a space for the Initials of a Picker (8).

Please note that any materials specified to be taken automatically from an auto-reduce location when the Work Order step is completed is not included in the pick sheet.

ROUTE STEP SETUP
BWRK0000001
Finished Item: SGR6
6 inch wide Green Coated Roll

Step 1

Work Center: Production

Operation: Slit Coated Rolls

Instructions: Slit Coated Rolls

Step Code: 1

Scheduled Date: 4/25/2017

Status: In-Progress

Update Resources

Create Pick Order (2) View Pick Sheet (1) Return

Delete Step

On return to the Route Step Screen, the View Pick Sheet button (1) can be used to view and print the current pick sheet for the Work Order step.

If some material has been picked for a Work Order step and a new pick order is generated for a Work Order step, by again selecting the Create Pick Order button (2), the original pick order will be closed and a new pick order created with the quantity already picked shown and the quantity still to be picked shown. This process allows for a modification of the materials required for a Work Order step and the generation of a new pick order, based on these changes.

When a pick order is closed then no further picking against this pick order will be allowed with the Pick transaction.

Materials Managers View of a Pick Order

As an alternative to simply handing a Pick Sheet to a material handler or Emailing a copy to the Warehouse Manager, a Materials Manager can see a list of active Pick Orders. This is reached from the Pick Orders button on the Materials Managers switchboard, which is reached from the Main Switchboard.

This brings up a list of open pick orders, as shown below:

MATERIALS MANAGEMENT SWITCHBOARD

View Containers

Pick Orders

Inventory Excel Reports

Available Inventory

Add/Edit Item Masters

View Reports

Pre-Print Labels

Print Location Labels

Return

Pick Order #	Order Type	Reference	From Facility	To Facility	Customer Name	Date Wanted	Status	View	Edit
P000001	Ship Order	SO1002			Smithfield Printing	04/24/2017	Shipped	View	Edit
P000002	Ship Order	SO1002			Smithfield Printing	03/11/2014	Shipped	View	Edit
P000003	Ship Order	SO1002			Smithfield Printing	03/11/2014	Shipped	View	Edit
P001003	Work Order Step	TBWRK00000001.1					Ready To Pick	View	Edit
--Show All--		--Show All--		--Show All--		--Show All--		--Show All--	

Filter Add New Return

On this screen, we see a list of Pick orders, listed by Pick Order Number (1). The order type (2) can be for a Work Order Step, a Ship Order, a Move Ticket or picking for a BOM Kit. The Reference (3) is the Work Order Step barcode or the Ship Order Number. The From Facility (4) can be filtered so that only Picking Orders for a specific warehouse or stock room can be shown. Similarly the filter for the To Facility (5) can be filtered to group Pick Orders to be moved at the same time. The Customer Name (6) is used for Ship Orders. Each entry shows the Date Wanted (7) and the Status (8), so these can be filtered using the Filter boxes.

The View button (9) shows the current Picking Sheet for the Pick Order. The Edit button (10) brings the Materials Manager to the Pick Order detail screen, shown below:

On this screen, the Materials Manager or Warehouse Manager can:

1. See the information about the Pick Order (1) that cannot be modified.
2. Modify information about the Pick Order (2) and the Save (3) the changes.
3. View and edit the Line Items (4) for the Pick Order.

Selecting the Line Items button brings up the screen shown below:

PICK ORDER SETUP

Pick Order Number: P001003

Pick Order Type: Work Order Step 1

Picking Status: Ready To Pick

Reference: TBWRK00000001.1

Description:

From Facility: 2

To Facility:

To Location: Production

Date Wanted: 04/24/2017

3 Save
 4 Print
 5 Close Order
 Return

List of Pick Order Lines						
Pick Order Number: P001003						
Line Number	Item Number	Item Description	Quantity	Unit Name	Quantity Picked	To Be Picked
1	SGR6	6 inch wide Green Coated Roll	1000	feet	0	1000
				--Show All--		

Filter Add New Return

From this list of line items, the materials manager can view or edit the details of each pick order line, as shown at right.

Alternately they can choose to add lines to the Pick Order.

These are the same screens that are used when creating manual move tickets.

ORDER LINE ITEM DETAIL
Pick Order P001003

Line Number:

Item Number: ...

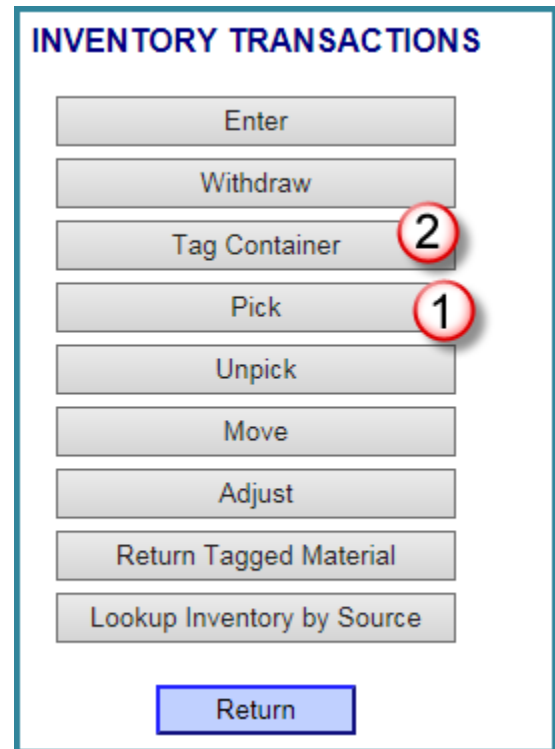
Units: ▼

Quantity:

Picking Materials for a Work Order Step

This is done using the Pick transaction (1), which is selected from the Inventory Transaction switchboard, which is reached from the main Transaction Switchboard, which is reached from the Main Switchboard.

Please note that if the material handler is picking the materials into a tote or some other container, then this container must have previously been recorded into the system using the Tag Container transaction (2). Totes and other containers setup for this use should be designated as multi-use (Type 2).



PICK

Employee Badge 1

Pick Order Number 2
 ...

Pick Order Line 3
 ...

SUGARS, GRANULATED	
Item Number:	RM130001
Quantity Left To Pick:	1.3
Units:	Pounds

Source Barcode 4
 ...

Stock Room Location #01513
 Available Qty: 50
 Pick Whole Container 5

Destination Barcode 6
 ...

Warehouse 7

When the Pick transaction is selected the screen art right appears. Here the material handler must enter their employee badge (1).

Then they can scan or select the pick order number (2) and the pick order line (3). After which they are presented with the quantity of which material to pick.

In (4) they can scan the barcode on the container of material they are picking or they can use the ellipses to get a list of the available material by lot number by location in expiration date order. Materials without an expiration date are shown in FIFO order.

Materials, such as bags of sugar, are typically picked as whole containers and then materials are withdrawn from them in production. Electronic components, for example, are typically picked as individual components from the boxes or bags and so the Pick Whole Container checkbox, would be checked in the former case but not in the latter.

The Destination Barcode is typically the tracking barcode fixed to the tote or pallet on which the materials are to be moved to their destination.

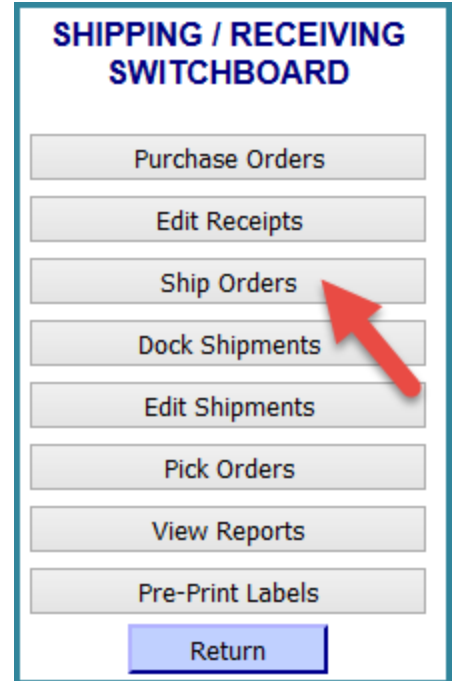
After selecting Pick (7), the material handler can cycle round more materials by scanning other line items on the pick order and scanning them into the tote or onto the pallet.

The movement of the materials from the warehouse or stock room to their final destination in production can then be recorded using an inventory Move transaction.

Creating a Pick Order from a Ship Order

After a Ship Order (SO) has been created as described in the SO User's Manual, a Pick Order will be generated for the Ship Order when the SO is released, provided that the PICK module is licensed.

The Pick Order can be printed out by the Shipping/Receiving Supervisor from his switchboard by clicking on Ship Orders. This brings up the screen shown below:



Order Number	Customer Name	Order Notes	Date Placed	Date Wanted	Importance	Status	Last Action		
SO1003	Smithfield Printing	Test Order	03/01/2017	04/16/2014	Standard	Not Released	03/01/2017	View Order	Pick Order
SO1002	Smithfield Printing		03/01/2017	03/11/2014	Standard	Back Ordered	03/27/2017	View Order	Pick Order
	--Show All--		--Show All--	--Show All--	--Show All--	--Show All--	--Show All--		

Filter Return

By clicking on the Pick Sheet button, this brings up the Pick Sheet, as shown here:

PICKING SHEET				
<i>Pick Order #</i>	P000003			
<i>Ship Order #</i>	SO1002			
<i>Customer Name</i>	Smithfield Printing			
<i>Customer Order #</i>		<i>Date Wanted</i>	03/11/2014	
<i>From Facility</i>		<i>Description</i>		
<i>To Facility</i>				
<i>To Location</i>				
<i>Issued By:</i>	Green, Eric			
<i>Shipping Instructions:</i>				
Item Number / Description	Quantity Ordered	Quantity Shipped	Quantity Picked	Quantity To Be Picked
	100 ft	100 ft	100 ft	0 ft
SGR6 6 inch wide Green Coated Roll <i>Configuration</i>	<i>Suggested Location:</i>		<i>Initials:</i> _____	
	200 ea	0.51 ea	51 ft	19949 ft
SGR6 6 inch wide Green Coated Roll <i>Configuration</i>	<i>Suggested Location:</i>		<i>Initials:</i> _____	

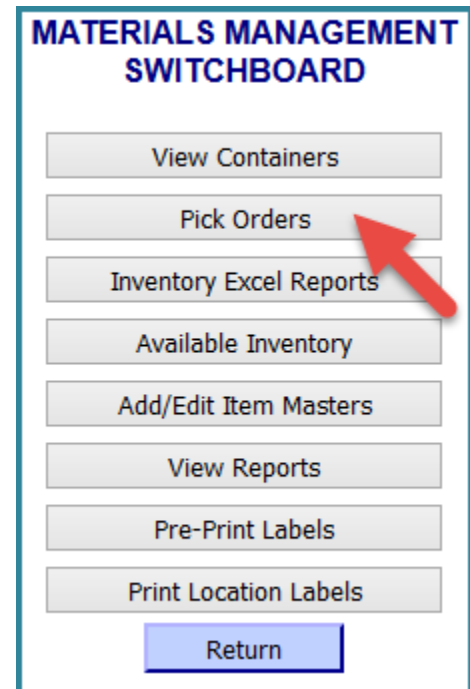
This can be then used to record the picking of the materials and their packing into shipping containers and/or their movement to a staging area. From here, all the materials picked on the pick sheet can be recorded as having been shipped using a Ship Picked transaction or the individual containers can be recorded as having been shipped, using a simple Ship transaction.

Manually Entering a Move Ticket

On the Materials Management Switchboard (reached from the Main Switchboard) the Pick option introduces a Pick Orders button.

Clicking on this button brings up a list of Pick orders as shown previously

From the List of Pick Orders screen, click on the "Add New" button and this will bring up a Pick Order Setup screen on which to enter the Move Ticket.



The

The screenshot shows the 'PICK ORDER SETUP' form. It has several input fields: 'Pick Order Number' (PM0000001), 'Pick Order Type' (Move Ticket), 'Reference', 'Description', 'From Facility', 'To Facility', 'To Location', and 'Date Wanted'. There are four buttons at the bottom: 'Save', 'Line Items', 'Return', and 'Close Order'. Red circles with numbers 1, 2, and 3 are placed over the 'Pick Order Number', 'Description', and 'Save' buttons respectively.

system will automatically assign a unique Pick Ticket number (1) and assign a type of Move Ticket. A Materials Manager can then enter information about the move ticket (2) and finally select Save (3).

Once the Move Ticket is saved, it can be edited by selecting the line item from the List of Pick Orders and clicking on the Edit button which brings up this screen in Update mode.

From this screen, a Materials Manager can Close the pick order, which inhibits further scanning on the Pick order or they can click on the Line Items button to add or edit line items, which brings up the screen below:

List of Pick Order Lines						
Pick Order Number: PM0000001						
Line Number	Item Number	Item Description	Quantity	Unit Name	Quantity Picked	To Be Picked
No Results Found.						
				--Show All--	▼	
Filter	Add New	Return				

Line items can be added to the Pick Order by selecting the Add New button (1), which brings up the screen shown below.

On this screen the Materials Manager can enter a unique Line Number (1), select the Item Number to be moved, using the ellipses, select the UOM and quantity (3) and then click on Add Line to add the line to the Pick Order.

Subsequently the line item can be edited by selecting the Edit button on the List of Pick Order Lines.

Having setup the line items, the Materials Manager can then print out the Pick Sheet from the List of Pick Orders using the view button and hand it to a materials handler to pick and move the materials.

ADD LINE ITEM
Pick Order PM0000001

Line Number: 1

Item Number: GCR12 ...

Units: feet

Quantity: 10

Add Line Return