



WHITE PAPER

TRIMIT Warehouse Integration 22.1

This document contains information about the Warehouse Integration functionality in TRIMIT 22.1 for Microsoft Dynamics 365 Business Central 2022, Wave 1 (W1).

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INTRODUCTION

This document contains information regarding TRIMIT Integration with standard Business Central Warehousing Features on all different levels of complexity in TRIMIT 22.1.

It is neither the purpose of this White Paper to describe all possibilities in Warehousing nor the purpose how Business Central (BC) Warehousing works. Its focus will be on the functionality that TRIMIT has added, so that TRIMIT Customers can use the standard BC Warehousing Features.

Note that the goal of these additions is to have a working integration between TRIMIT functionality and BC Warehousing Features. It does not solve any gap that has its origin in BC in this version. Some of those gaps are identified and put into the TRIMIT Idea Catalogue, which means that they may be solved in a future version, preferably when there is a requirement in a project.

This document will only discuss the functionality and fields that has been added by TRIMIT. For information about standard BC fields, please see the documentation from Microsoft.

The license requirements for working with warehousing depends on the complexity – see below – of the required Warehousing. It effects only the BC part of the license. It has no effect on the TRIMIT parts of the license.

In this document is described how the integration works on the following levels of complexity.

1. Inventory Pick and -Put-away
2. Basic Warehousing including Warehouse Shipments and Warehouse Receipts
3. Advanced Warehousing including Warehouse Directed Put-away and Warehouse Pick

We will investigate this from Wholesale perspective and from TRIMIT Production perspective for both Fashion and Configurable Products (Furniture). This will be done by following several scenarios.

In addition, dos and don'ts will be described for a properly working interaction between TRIMIT and BC Warehousing including the necessary Setup.

We will go through the integration functionality based on Scenarios divided in six main groups based on the complexity level as described above and whether it involves TRIMIT Production or not.

The audience for this document is the BC Consultant or very skilled BC User. Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The functionality described is the functionality as of **TRIMIT 22.1 for Business Central W1 BC20.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 22.1**, which is based on Microsoft Dynamics 365 Business Central 2022 Release Wave 1, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Warehouse Integration contains the following objects:

Page	<i>6036779 trm Warehouse Receipts</i>
Codeunit	<i>6036615 trm Whse Post Event</i> <i>6036619 trm Whse.-Activity-Post Event</i> <i>6037030 trm Warehouse Handling</i>
Report	<i>6036781 trm Create Pick Whse.</i> <i>6037040 trm Prod. Whse. Shortage List</i> <i>6037310 trm WhseSource Create Doc.</i>

Many other objects (i.e., Page Extensions and Table Extensions on BC pages and BC tables) are involved because of the use of Warehouse Management but they will not be listed here. The above-mentioned objects are however directly related to **TRIMIT Warehouse Integration**.

BEFORE YOU START...

Before you start implementing the TRIMIT / BC Warehousing integration, you need to be aware of several important aspects:

1. Reading this Document and working with the TRIMIT/BC Warehousing Integration requires sufficient knowledge of the required TRIMIT areas (Wholesale and/or Production) and Microsoft Dynamics BC Warehousing.
2. Create yourself as a **Warehouse Employee** (via **Tell me Warehouse Employee**) of the Locations you want to work with that require Warehousing. In this White Paper, this will be the Locations *GREEN*, *BLACK*, *ORANGE*, and *GREY*. These locations have already been created in the TRIMIT Demo Company; each one with its own specific setup.
You can also include Location *CW* which is not mentioned in this White Paper.

Before you can allocate Locations to you as a Warehouse Employee, you will have to create yourself as a **User**. The moment that Users are setup in the database, you can only login to the system, if you are a User. Please consider if other Users should also have access to this database. Also consider creating the **User Setup** with the TRIMIT "Responsible" fields set to Yes.

3. In TRIMIT Production, it is possible to work with **negative stock**, if the **Costing Method** of the Item is *Standard*. This is however **NOT** accepted in standard BC Warehousing. The system will not be able to redirect negative stock to a specific **Bin**. This means that, if you want to do TRIMIT Production on a Location requiring Warehouse Activities, you should always have sufficient Raw Material stock to pick for Production Orders. The system will check on this.
4. Now, there is not a **Profile** available that supports all the Warehouse Activities in relationship with TRIMIT. For the moment, we advise to choose the **Role Warehouse Worker - Warehouse Management System** (Role Center ID 9009).
5. Due to the reasons above author advises to have **two Demo Companies**:
 - a. One for demos without Warehousing
 - b. One for demos with Warehousing

The difference between the two companies are just the parameters in the Inventory Setup (see [Inventory Setup](#)) but the company can become quite messy, if you switch on and off these checkmarks between different demos.

Therefore, you can use the data in the TRIMIT Demo Company for both situations, so it is quite easy to make a copy of the standard Demo Company and switch the Boolean to have a company for Warehousing demos. Please, keep in mind that only the **CRONUS TRIMIT W1 Ltd.** is connected to our Portals in case of using a TRIMIT Demo Site.

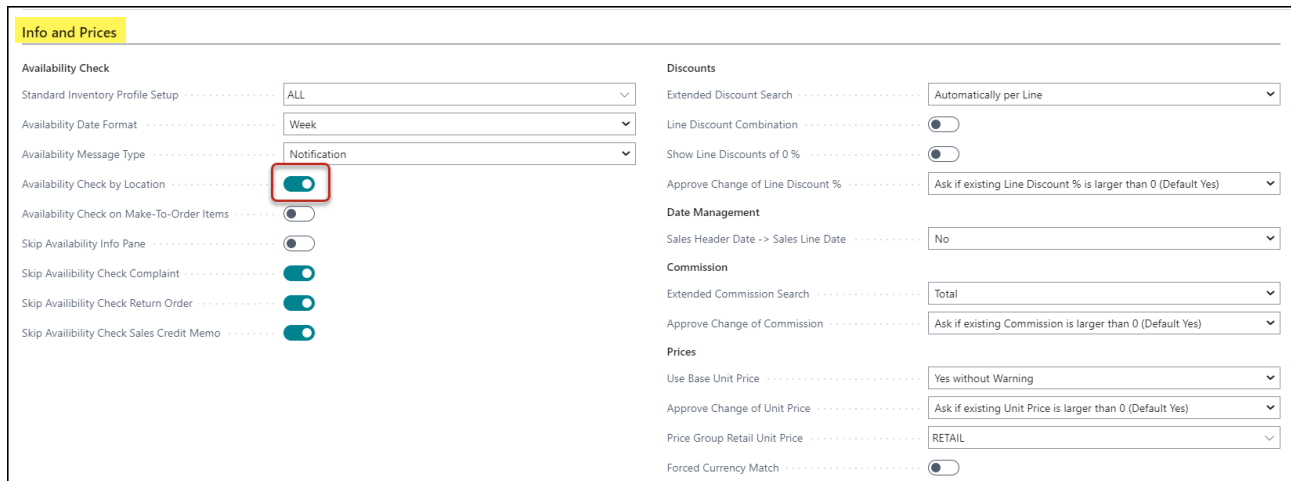
6. **Finish Related Production Order of Sales Order SWO01.**

SETUP FOR WAREHOUSE INTEGRATION

This chapter contains information regarding the Setups that you need to work with the standard BC Warehousing in a TRIMIT Database. This chapter excludes the Setup mentioned in the previous chapter, since they have been in the standard solution before the integration has been developed.

SALES & RECEIVABLES SETUP

In the **Sales & Receivables Setup** via *Tell me Sales & Receivables Setup*, there is one Parameter important regarding the Warehouse Integration:



The screenshot shows the 'Info and Prices' setup screen. The 'Availability Check by Location' toggle switch is highlighted with a red box and is turned on. Other visible settings include 'Standard Inventory Profile Setup' set to 'ALL', 'Availability Date Format' set to 'Week', 'Availability Message Type' set to 'Notification', 'Discounts' set to 'Automatically per Line', 'Line Discount Combination' set to 'Show Line Discounts of 0 %', 'Approve Change of Line Discount %' set to 'Ask if existing Line Discount % is larger than 0 (Default Yes)', 'Date Management' set to 'No', 'Commission' set to 'Total', 'Approve Change of Commission' set to 'Ask if existing Commission is larger than 0 (Default Yes)', 'Prices' set to 'Yes without Warning', 'Approve Change of Unit Price' set to 'Ask if existing Unit Price is larger than 0 (Default Yes)', 'Price Group Retail Unit Price' set to 'RETAIL', and 'Forced Currency Match' set to 'No'.

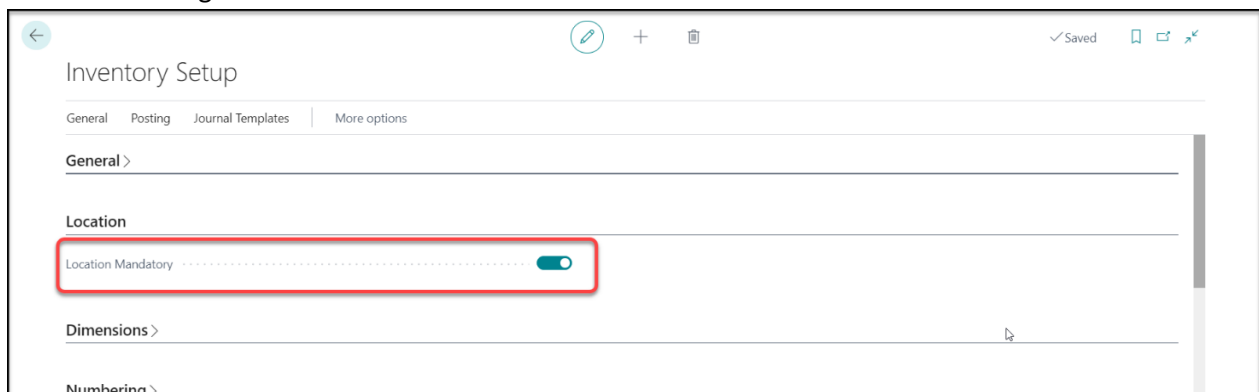
AVAILABILITY CHECK BY LOCATION

If you want TRIMIT Availability Check by Location, you must set this Parameter to Yes.

This Parameter must be set to Yes, if you want to use the full WMS functionality, and therefore will set the **Use Warehouse Functionality** in the Inventory Setup to Yes.

INVENTORY SETUP

In the **Inventory Setup** via *Tell me Inventory Setup*, there are several Parameters important regarding the Warehouse Integration:



The screenshot shows the 'Inventory Setup' screen. The 'Location Mandatory' toggle switch is highlighted with a red box and is turned on. Other visible settings include 'General', 'Posting', 'Journal Templates', and 'More options' tabs, and 'Location', 'Dimensions', and 'Numbering' sections.

Inventory

Filter Transfer Order Search Order Overlying Level ▾

Use Customer/Vendor Language Code ☒

Phys. Inventory Journal

Use TRIMIT Calculate Inventory Report ☐

Maintenance

Automatic Update Item from Master 100 ...

Automatic Update SKU from Master S... 19 ...

Pick

Delete Pick by Posting Pick Document Header ▾

Set Quantity Picked Quantity Picked = 0 ▾

Pick Set Await Posting Default ☐

Sales Posting Derived from Pick Ship and Invoice ▾

Suppress Dialogs at Pick Update & Po... ☐

Sales/Container Management Via Container Management ▾

Warehouse

Use Warehouse Functionality ☒

Warehouse Shipment/Receipt creatio... ▾ Per Order/Location

Require Pick Production ☒

LOCATION MANDATORY

To use the Warehouse Integration this Parameter needs to be set to Yes. It is advisable to have a mandatory Location unless the company only has one physical Warehouse and no virtual Warehouses.

USE TRIMIT CALCULATE INVENTORY REPORT

This Parameter must be set to No; otherwise, you cannot change **Use Warehouse Functionality** to Yes. Standard BC Warehousing has its own Inventory Reports.

USE WAREHOUSE FUNCTIONALITY

If this Parameter is Yes, you can use the specific TRIMIT functionality integrated with BC WM(S). Only then, some FastTabs, Fields and Actions will be visible on several Pages. An example of this is shown in the picture below. Here you see the FastTab **Warehouse** in the Master Card that would not be visible, if the Parameter above was No.

This field can only be set to Yes, if the **Check Availability by Location** in the Sales & Receivables Setup has been set to Yes; you need to check availability for every single Location, because the Location also determines the processes you need to go through.

Master Card | Work Date: 9/6/2020

2000 · Olivia Trousers

New Process Reports Actions Related Reports Fewer options

Net Weight 0.7

Unit Volume 0

Item Tracking

Item Tracking Code ▾

Serial Nos. ▾

Lot Nos. ▾

Expiration Calculation

Warehouse

Warehouse Class Code ▾

Special Equipment Code ▾

Put-away Template Code ▾

Put-away Unit of Measur... ▾

Phys Invt Counting Perio... ▾

Use Cross-Docking ☒

Exclude from Warehouse... ☐

Require Pick for Producti... ☒

Details Attachments (0)

Master Pictures ▾

Picture No. 000068 ...

Number of Pictures 1



WAREHOUSE SHIPMENT/RECEIPT CREATION PER CONTAINER

If you want to create Warehouse Shipments or Warehouse Receipts based on a Container, you need to choose on which level new Warehouse Shipments/-Receipts should be created.

You can choose between the following two options:

Per Order/Location	Per Order/Location a separate Warehouse Shipment or -Receipt will be created
Per Container/Location	Per Container/Location a separate Warehouse Shipment or -Receipt will be created.

NOTE

Only for Locations that require Warehouse Transactions, Warehouse Documents can be created.

Therefore, we advise not to take Sales Lines of various Locations in the same Container.

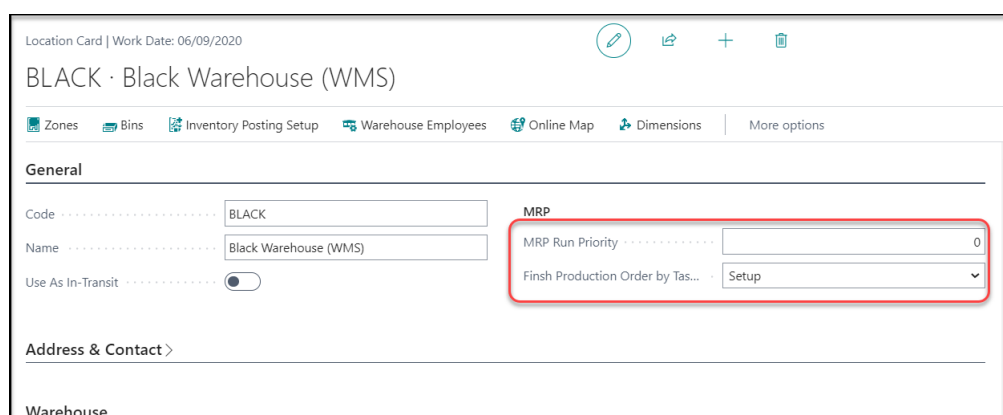
REQUIRE PICK FOR PRODUCTION

If this Parameter is Yes, you need to use the Warehouse Picks to pick the Raw Materials for the TRIMIT Production Orders.

This Parameter will be copied into the field **Require Pick for Production** of new created Masters. This Boolean is discussed later in this White Paper.

LOCATIONS

In the picture below, you can see a fragment of the Location *BLACK* of the TRIMIT Demo Company. TRIMIT has added two additional fields to the Location: **MRP Run Priority** and **Finish Production Order by Task Registration**. These fields have nothing to do with the integration of TRIMIT with Warehousing, so they will not be discussed here. You can find a description in the White Papers: *TRIMIT Material Requirement Planning* and the *TRIMIT Setups*, respectively.



Though no extra fields have been added on behalf of the Warehouse integration of TRIMIT, some of the existing fields are now used for TRIMIT Production Orders integration with standard BC Warehousing. Since the TRIMIT Production Orders have nothing to do with standard BC Production, the purpose of these fields is discussed below.

Bins	
Receipt Receipt Bin Code RECEIPT_STACKED	
Shipment Shipment Bin Code SHIP_STACKED	
Production Open Shop Floor Bin Code PROD_OPEN_RACK	
To-Production Bin Code PROD_OPEN_ROLL	
From-Production Bin Code PROD_FIN_RACK	
Adjustment Adjustment Bin Code ADJ_STACKED	
Cross-Dock Cross-Dock Bin Code	
Assembly To-Assembly Bin Code	
From-Assembly Bin Code	
Asm.-to-Order Shpt. Bin Code	

OPEN SHOP FLOOR BIN CODE FIELD

This field specifies the Bin Code that acts as the **Default Shop Floor Bin** for this Location. The Open Shop Floor Bin is typically a piece of space in the production area (Shop Floor) with enough stock of **Components**, which consumptions can be **automatically posted** (flushed) without requesting a Warehouse Activity to bring them to the Bin.

The value in this field is automatically inserted in the **Bin Code** Field on **Production Order Lines** (Component Lines) under the following conditions:

1. The Location Code on the Production Order Line points to this Location.
2. The field **Require Pick TRIMIT Production** on the Item is set to *No (FALSE)*.

Typically, this Bin is used for:

- Small Items, such as bolts, screws, thread, or other Items that you may not want to pick in the Warehouse per Production Order but are needed during the production process.
- Order specific Sub-Assemblies, which do not return to the Warehouse, but will be used for the next step in production.

Make sure that there is sufficient stock compared to the quantities to be consumed on the Production Order Lines pointed to this Bin.

NOTE

At the end of this paragraph, you can find a flow chart that describes how TRIMIT/BC finds an appropriate Bin Code.

TO-PRODUCTION BIN CODE FIELD.

This field specifies the default space in the production area (Shop Floor) on which **Components** (Raw Materials and/ or Sub-Assemblies) are placed that are picked for production. This Bin is typically used for Items that must be **consumed manually**.

The value in this field is automatically inserted in the **Bin Code** field on **Production Order Lines** (Component Lines) under the following conditions:

- The Location Code on the Production Order Line should point to this Location.
- The field **Require Pick TRIMIT Production** on the Item is set to *Yes (TRUE)* or
- **Material Consumption Method** on the Item is set on *Manually*.

Posting will decrease the stock as consumption from this Bin. This means that the stock level in this Bin must be equal or higher than the Quantity to Consume.

NOTE

At the end of this paragraph, you can find a flow chart that describes how TRIMIT/BC finds an appropriate Bin Code.

FROM-PRODUCTION BIN CODE FIELD.

This field specifies the space in the production area (Shop Floor) on which the **Production Output** (Finished Products) could be placed by default if the process requires Warehouse Activities.

The value in this field is automatically inserted in the **Bin Code** field on the **Production Order Header** if the Location on the Production Order Header points to this Location. This Bin will typically be used for Finished Products or Sub-Assemblies that must go back to the Warehouse where they will be stored until further actions are required.

NOTE

At the end of this paragraph, you can find a flow chart that describes how TRIMIT/BC finds an appropriate Bin Code.

ORDERS CREATED ON LOCATIONS WITH WAREHOUSING

In the TRIMIT Demo Company the following Orders have been created on behalf of the Warehousing Scenarios in this White Paper.

Order Type	Location	Order No.
Sales Order	ORANGE	SW004, SW005, SW006
	GREEN	SW007, SW008
	BLACK	SW001, SW002, SW003, SW009
	GREY	SW001
Purchase Order	ORANGE	PW0001
	GREEN	PW0002, PW0003
	BLACK	PW0004, PW0005
Transfer Order	BLUE -> ORANGE	T0001
Production Order	ORANGE	PIW002
	GREEN	PIW001
	GREY	PO000001
Prod. Col. Order	BLACK	PCOB0002

CONTAINERS CREATED ON BEHALF OF WAREHOUSING SCENARIOS

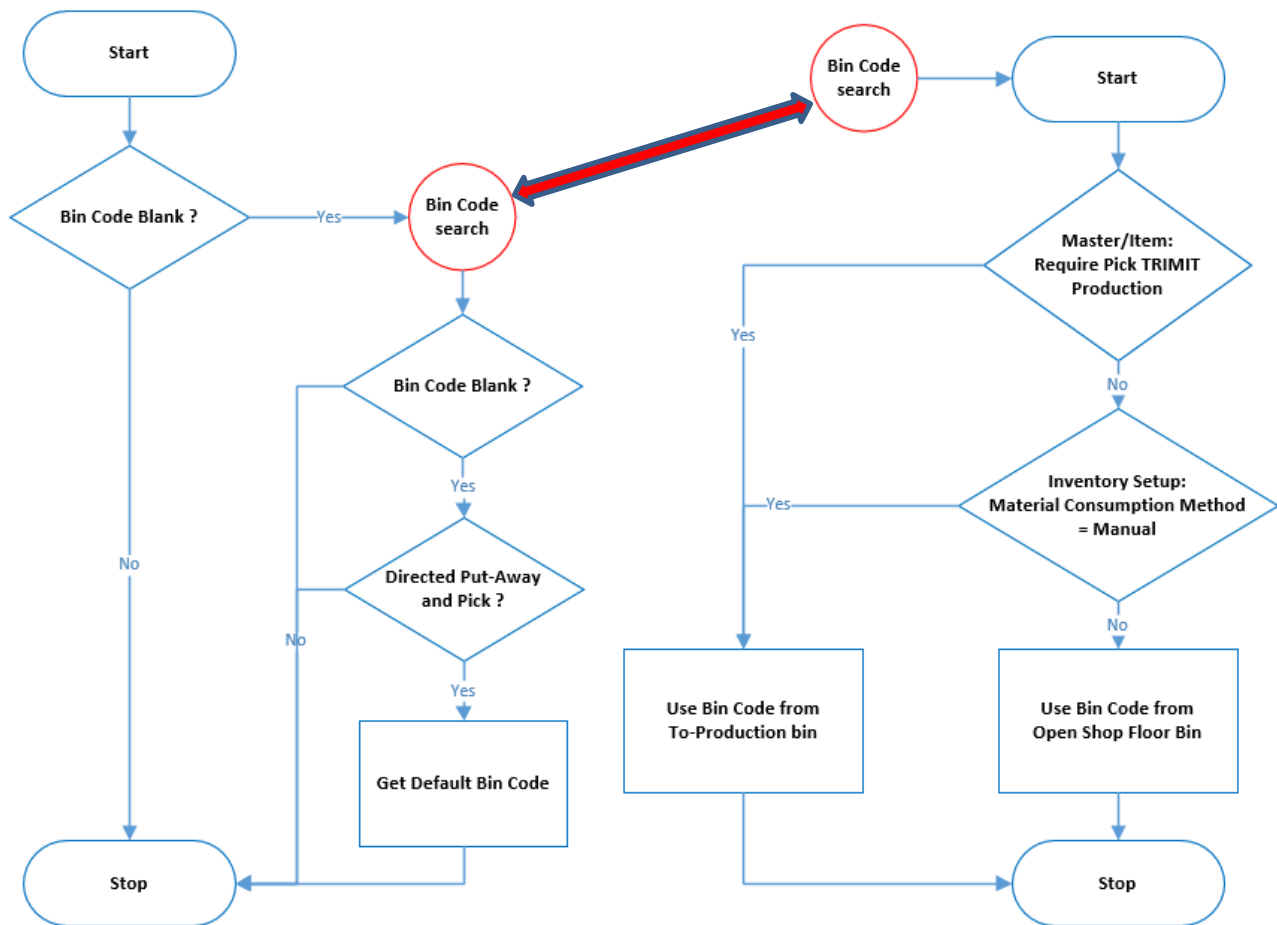
Also, the Container Management Feature in TRIMIT is integrated with BC Warehousing. The following two Containers are setup in the TRIMIT Demo Company and used in the scenarios in this White Paper.

Container No.	Type	Order no.	Location
CONT0005	Outbound	Sales Order SW005	ORANGE
CONT0006	Inbound	Purchase Order PW0003	GREEN

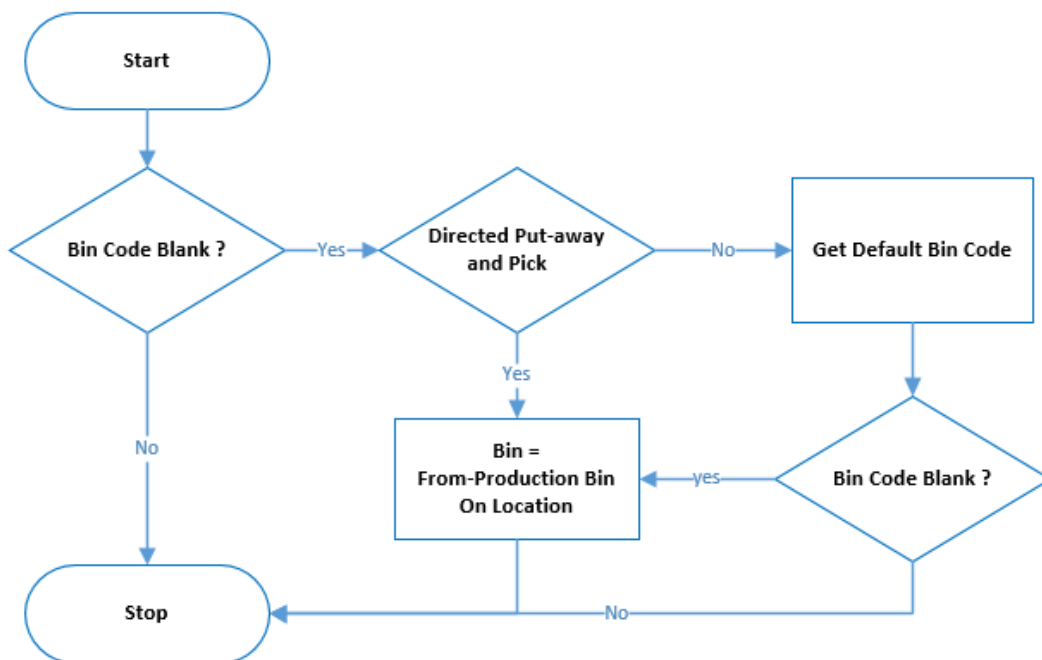
FINDING THE APPROPRIATE BINS ON TRIMIT PRODUCTION ORDER

In this Sub-paragraph is explained how TRIMIT/BC controls the Bins selection on the Production Orders. This is relevant for understanding the process in the back. However, it is not required for going through the scenarios in this White Paper.

On a Production Order we discriminate the Production Order Header and the Production Order Lines. The first flow chart shows you how the system finds the appropriate Bins on the **Production Order Lines**.



In the next flow chart is shown how TRIMIT/BC finds the appropriate Bin on the **Production Order Header**.



We will discuss examples of these in scenarios concerning TRIMIT Production integrated with BC Warehousing.

MASTER & ITEM SETUP

In this paragraph, the fields on the **Master** and the **Item** are discussed. These fields – shown from the Master Card – can also be found on the Item Card¹ and have the same function. The values of these fields on the Item Card are leading but are maintained from the Master Card to which the Item is related.

These fields are only shown, if the parameter **Use Warehouse Functionality** in the Inventory Setup is Yes (**TRUE**). All these fields are standard BC except **Exclude from Warehouse Transactions** and **Require Pick for Production**. These will be explained below. We will also mention which Masters/Items have a specific **Warehouse Class Code**.

Warehouse		Show less	
Warehouse Class Code		Phys Invt Counting Period Code	
Special Equipment Code		Use Cross-Docking	☒
Put-away Template Code		Exclude from Warehouse Transactions	☐
Put-away Unit of Measure Code		Require Pick for Production	☒

EXCLUDE FROM WAREHOUSE TRANSACTION

The **Exclude from Warehouse Transactions** field is used to exclude Items from Warehouse Transactions, such as Pick, Put-away, Warehouse Shipments and -Receipts. If this field on an Item is set to Yes (**TRUE**), this Item will not appear in the Warehouse Transactions mentioned above.

¹ **Item Cards** related to a **Master** can be opened from **Item List**. This list can be found on the **Master List/Card** under **Process, Item List**.

Examples of these Items can be Gift Cards, Brochures, Clips, Nails, Bolts, Glue, etc.

NOTE

Other Items that are excluded from Warehouse Transactions are Items that are **Blocked** or Items with **Type Non-Inventory**.

REQUIRE PICK FOR PRODUCTION

The **Require Pick for Production** field is controlling whether the Item must be on an **Inventory Pick** or a **Warehouse Pick** in connection with **TRIMIT Production**. It will be used for Items that are in the Component Lines of a TRIMIT Production Order.

This checkmark does not have any effect on Finished Products. Therefore, it could be useful to have the **Require Pick for Production** parameter set to *Yes* in the Inventory Setup (see above). This means that for all new Masters and Items the value of this field will be *Yes (TRUE)* by default.

WAREHOUSE CLASS CODE

The **Warehouse Class Code** defines how a particular product is stored. This is a standard BC field. This way you could determine, if a particular product needs to be stored in a specific way or in a specific environment (Cooled, Frozen, Dry, Humid, etc.). For Fashion products that could be for instance “Hanging” (*RACK*) or “Folded” (*STACK*). Fabrics are stored in “Rolls” (*ROLL*).

In the TRIMIT Demo Company we have setup the following Masters with a Warehouse Class Code:

Master No.	Description	Whse. Class Code
2330	Uma Skirt	STACKED
2200	Grace Bomber	RACK
M2000	Fabric 72 % Polyamide, 28 % Elastane	ROLL
M2030	Jaguar Print 72 % Polyamide, 28 % Elastane	ROLL
M2100	Thread 100% Cotton	RM
M2300	Zipper 10 - 100 cm	RM

INVENTORY PICK AND PUT-AWAY

Inventory Pick and **Inventory Put-away** are standard BC Features that enables to create a Pick and/or Put-away on a Location without any other complex Warehousing processes. This is the simplest way of Warehousing in the TRIMIT/BC system. In this chapter, we will discuss some scenarios for Inventory Pick and Put-away for Locations with only Wholesale activities.

SPECIFIC DATA FOR INVENTORY PICK AND PUT-AWAY

The specific data described in this chapter is additional to the setup discussed in the previous chapter. Its purpose is to show the appropriate data that can be used in the Demo Company.

LOCATION ORANGE

TRIMIT has introduced **Location ORANGE** in their Demo Company. This Location has been setup in such a way, that it enables the Inventory Pick and Put-away as shown in the picture below.

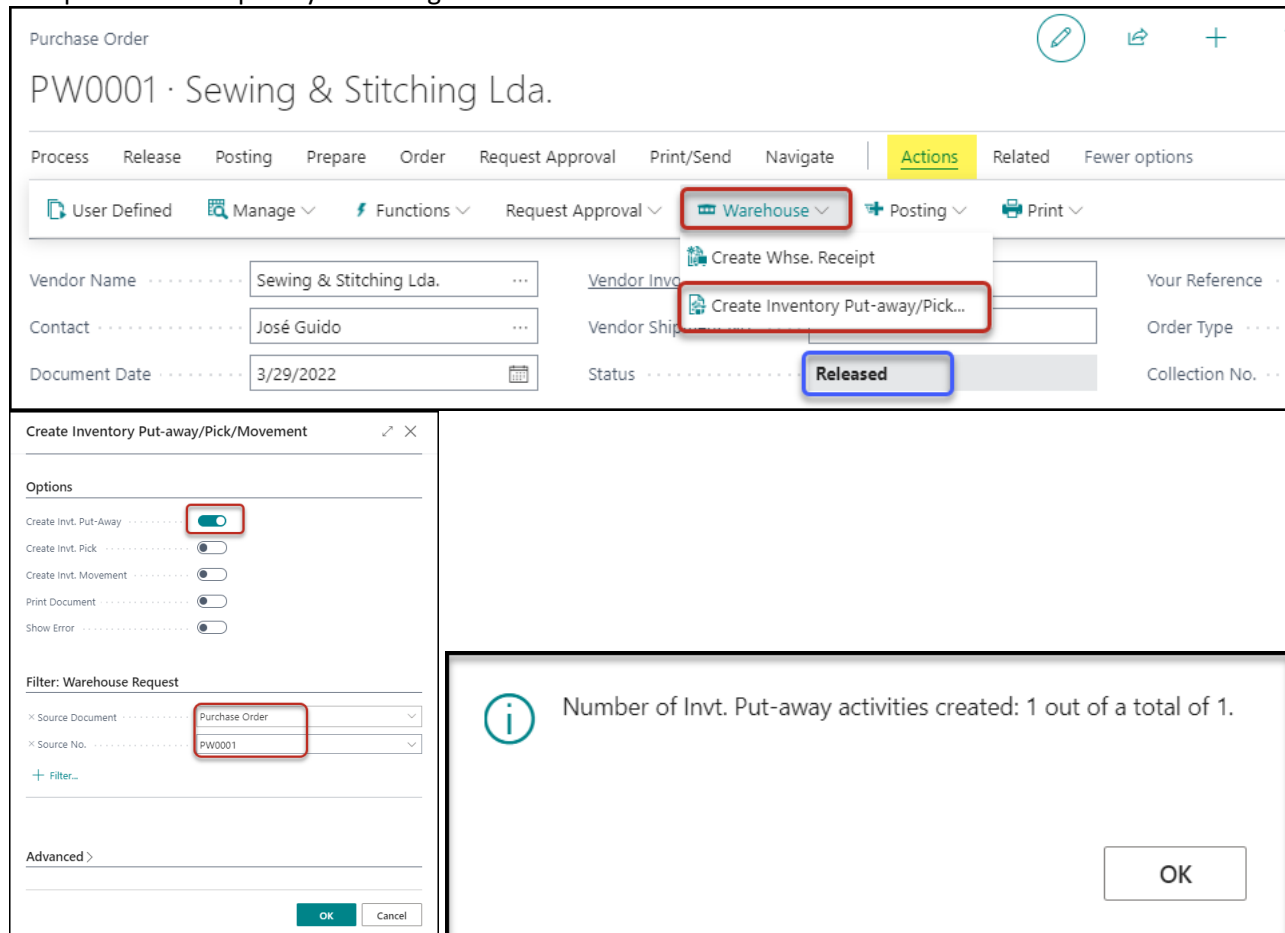
Warehouse	
Require Receive	☐
Require Shipment	☐
Require Put-away	☒
Use Put-away Worksheet	☐
Require Pick	☒
Bin Mandatory	☐
Directed Put-away and Pick	☐
Use ADCS	☐
Default Bin Selection	
Outbound Whse. Handling Time	
Inbound Whse. Handling Time	
Base Calendar Code	
Customized Calendar	No
Use Cross-Docking	☐
Cross-Dock Due Date Calc.	

INVENTORY PUT-AWAY FROM PURCHASE ORDER

In this paragraph we will discuss a scenario with simple Warehousing features. The scenario contains a **Purchase Order PW0001** with garments that we like to receive on **Location ORANGE** as we can see on the Purchase Lines

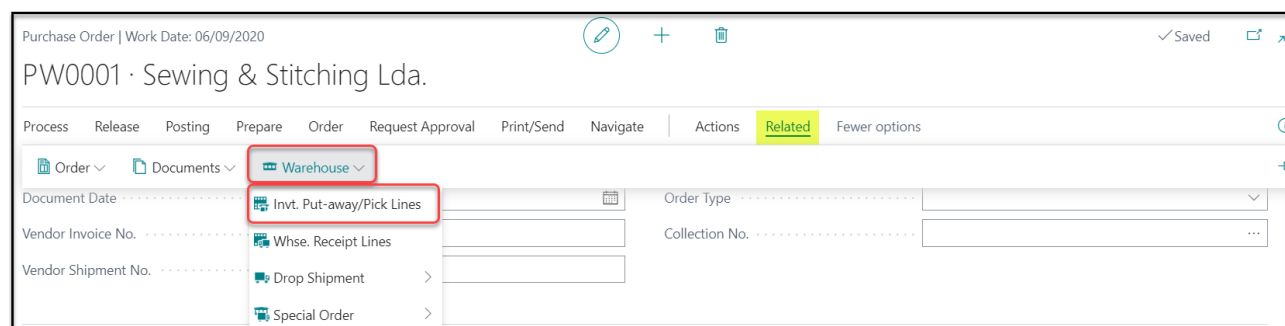
Purchase Order									
PW0001 · Sewing & Stitching Lda.									
Process Release Posting Prepare Order Request Approval Print/Send Navigate More options									
* General >									
Lines Manage Line Functions Order Fewer options									
Exp... Mat...	Type	No.	Description	Description 2	Location Code	Bin Code	Quantity	Unit of Measure Code	
→ ☒	Matrix	2120	Sophia Shirt		ORANGE		480	PCS	
☐	Item	21202001	Sophia Shirt	Royal Blue,XS	ORANGE		10	PCS	
☐	Item	21202002	Sophia Shirt	Royal Blue,S	ORANGE		20	PCS	
☐	Item	21202003	Sophia Shirt	Royal Blue,M	ORANGE		30	PCS	
☐	Item	21202004	Sophia Shirt	Royal Blue,L	ORANGE		40	PCS	
☐	Item	21202005	Sophia Shirt	Royal Blue,XL	ORANGE		30	PCS	

In the picture below, we can see how to create an **Inventory Put-away** from a Purchase Order Header: via **Actions, Warehouse, Create Inventory Put-away/Pick**. Note that the Order should be **Released**. In the screen that pops up: set the **Create Invt. Put-away** on Yes. Press **OK** and the Inventory Put-away will be created. For this a confirmation will show up after which you will also press **OK**. This process is completely according to Standard BC.



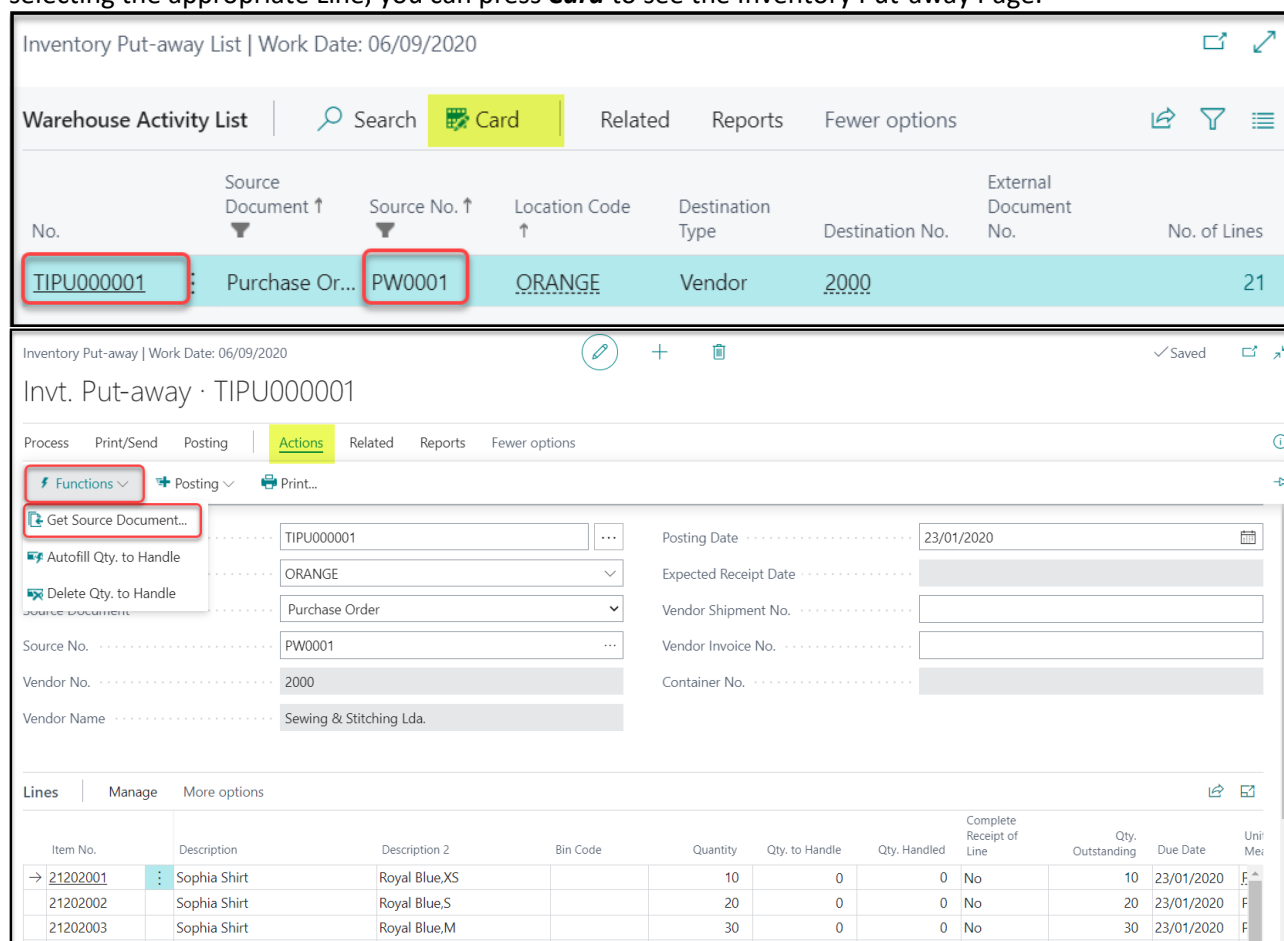
The screenshot displays the 'Purchase Order' header for 'PW0001 · Sewing & Stitching Lda.'. The 'Status' is 'Released'. The 'Actions' menu is open, showing 'Warehouse' and 'Create Inventory Put-away/Pick...'. The 'Create Inventory Put-away/Pick/Movement' dialog is shown with 'Create Invt. Put-Away' set to 'Yes'. The 'Filter: Warehouse Request' section shows 'Source Document' as 'Purchase Order' and 'Source No.' as 'PW0001'. A confirmation message states: 'Number of Invt. Put-away activities created: 1 out of a total of 1.' with an 'OK' button.

This means that 1 Put-away Activity has been created. You can search for this Inventory Put-away in the Inventory Put-away List and look for the appropriate Inventory Put-away, but there is also a direct link to this Inventory Put-away from the Purchase Order itself. Then you must click as shown in the screenshot below: **Related, Warehouse, Inv. Put-away/Pick Lines**.



The screenshot displays the 'Purchase Order' header for 'PW0001 · Sewing & Stitching Lda.'. The 'Related' tab is active, showing 'Warehouse' and 'Inv. Put-away/Pick Lines'. The 'Inv. Put-away/Pick Lines' section is highlighted, showing a list of lines with columns for 'Document Date', 'Vendor Invoice No.', 'Vendor Shipment No.', 'Order Type', and 'Collection No.'.

Then a Page with all appropriate Inventory Put-aways is shown. In this case we have only one. After selecting the appropriate Line, you can press **Card** to see the Inventory Put-away Page.



The screenshot shows two parts of the application. The top part is the 'Inventory Put-away List' for Work Date: 06/09/2020. It has a table with columns: No., Source Document, Source No., Location Code, Destination Type, Destination No., External Document No., and No. of Lines. The first row is highlighted in light blue and has red boxes around the 'No.' field (TIPU000001) and the 'Source No.' field (PW0001). The bottom part is the 'Inventory Put-away' page for TIPU000001, Work Date: 06/09/2020. It has a 'Functions' dropdown menu open, showing 'Get Source Document...' as the selected option. Below this, there are fields for 'Posting Date' (23/01/2020), 'Expected Receipt Date', 'Vendor Shipment No.', 'Vendor Invoice No.', 'Container No.', 'Source No.' (PW0001), 'Vendor No.' (2000), and 'Vendor Name' (Sewing & Stitching Lda.). At the bottom, there is a table with columns: Item No., Description, Description 2, Bin Code, Quantity, Qty. to Handle, Qty. Handled, Complete Receipt of Line, Qty. Outstanding, Due Date, and Unit Measure. The table has three rows of data for Sophia Shirt in Royal Blue, XS, S, and M sizes.

No.	Source Document	Source No.	Location Code	Destination Type	Destination No.	External Document No.	No. of Lines
TIPU000001	Purchase Or...	PW0001	ORANGE	Vendor	2000		21

Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Complete Receipt of Line	Qty. Outstanding	Due Date	Unit Measure
21202001	Sophia Shirt	Royal Blue,XS		10	0	0	No	10	23/01/2020	F
21202002	Sophia Shirt	Royal Blue,S		20	0	0	No	20	23/01/2020	F
21202003	Sophia Shirt	Royal Blue,M		30	0	0	No	30	23/01/2020	F

By clicking **Actions, Functions, Get Source Document...** it is possible to go from the Inventory Put-away document to the related Purchase Order document(s).

NOTE

To be able to create an Inventory Pick – further on in this White Paper - it is necessary that there is Stock, so you need to post the **Inventory Put-away**: Click **Actions, Functions, Autofill Qty. to Handle**.

Then click **Posting, Post** followed by the choice for **Receive** and then **OK**.

INVENTORY PICK ON SALES ORDER

Creating an Inventory Pick from a Sales Order follows an almost identical procedure as creating an Inventory Put-away from a Purchase Order. There are some slight differences. This is shown in this paragraph. In the screenshot below we will see as an example **Sales Order SW004** of **Customer 2000** on **Location Code ORANGE**.

We will use the products that we have received in the previous paragraph: **Master 2120**.

Sales Order | Work Date: 06/09/2020

SW004 · The Fashion Store UK

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

General >

23/01/2020 23/01/2020 23/01/2020 Released

Lines Manage Line Order Fewer options

Exp... Mat...	Type	No.	Item Reference No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	VAT Area C
→	Matrix	2120		Sophia Shirt		ORANGE	48	PCS	34.99	
☐	Item	21202001		Sophia Shirt	Royal Blue,XS	ORANGE	1	PCS	35.99	
☐	Item	21202002		Sophia Shirt	Royal Blue,S	ORANGE	2	PCS	35.99	
☐	Item	21202003		Sophia Shirt	Royal Blue,M	ORANGE	3	PCS	35.99	
☐	Item	21202004		Sophia Shirt	Royal Blue,L	ORANGE	4	PCS	35.99	
☐	Item	21202005		Sophia Shirt	Royal Blue,XL	ORANGE	3	PCS	35.99	
☐	Item	21202006		Sophia Shirt	Royal Blue,XXL	ORANGE	2	PCS	35.99	
☐	Item	21202007		Sophia Shirt	Royal Blue,3XL	ORANGE	1	PCS	35.99	
☐	Item	21202101		Sophia Shirt	Light Blue,XS	ORANGE	1	PCS	35.99	
☐	Item	21202102		Sophia Shirt	Light Blue,S	ORANGE	2	PCS	35.99	
☐	Item	21202103		Sophia Shirt	Light Blue,M	ORANGE	3	PCS	35.99	

After creating the Order, it has been **Released**. Then we can make an **Inventory Pick** by clicking **Actions, Warehouse, Create Inventory Put-away/Pick....** In the screen that pops up: set the **Create Invt. Pick** on Yes. Press **OK** and the Inventory Put-away will be created. For this a confirmation will show up after which you will also press **OK**. This is all according to Standard BC and comparable to creating an Inventory Put-Away.

Sales Order | Work Date: 06/09/2020

SW004 · The Fashion Store UK

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

User Defined Manage Functions Plan Request Approval Warehouse Posting Print Order Confirmation

Create Inventory Put-away/Pick... Released

Create Warehouse Shipment

Customer Name The Fashion Store UK

Contact Charley Nelson

Posting Date 23/01/2020

Order Date 23/01/2020

Due Date 23/01/2020

Requested Delivery Date

External Document No.

Blocked

Ignore Blocking

Skip Availability Check

Order Type

Collection No.

Create Inventory Put-away/Pick/Movement

Options

Create Invt. Put-Away

Create Invt. Pick

Create Invt. Movement

Print Document

Show Error

Filter: Warehouse Request

* Source Document Sales Order

* Source No. SW004

+ Filter...

OK Cancel

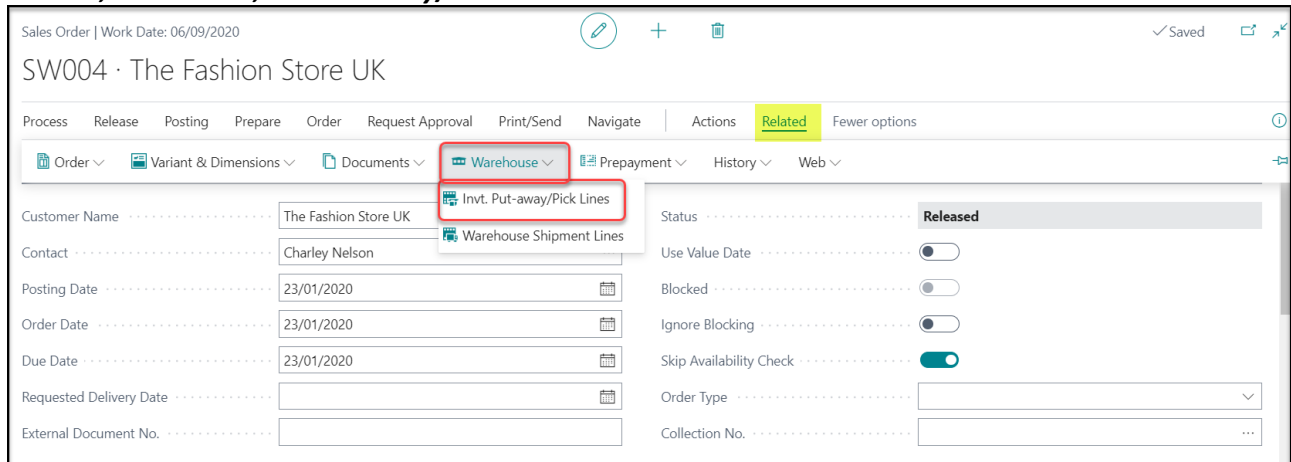
Number of Invt. Pick activities created: 1 out of a total of 1.

OK

This means that **1 Pick Activity** has been created. You can search for this Inventory Pick in the Inventory Pick List and look for the appropriate Inventory Pick, but there is also a direct link to this Inventory Pick

from the Purchase Order itself. Then you must click as shown in the screenshot below:

Related, Warehouse, Inv. Put-away/Pick Lines.



Sales Order | Work Date: 06/09/2020

SW004 · The Fashion Store UK

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions **Related** Fewer options

Order Variant & Dimensions Documents Warehouse **Inv. Put-away/Pick Lines** Warehouse Shipment Lines Prepayment History Web

Customer Name The Fashion Store UK Status Released

Contact Charley Nelson Use Value Date

Posting Date 23/01/2020 Blocked

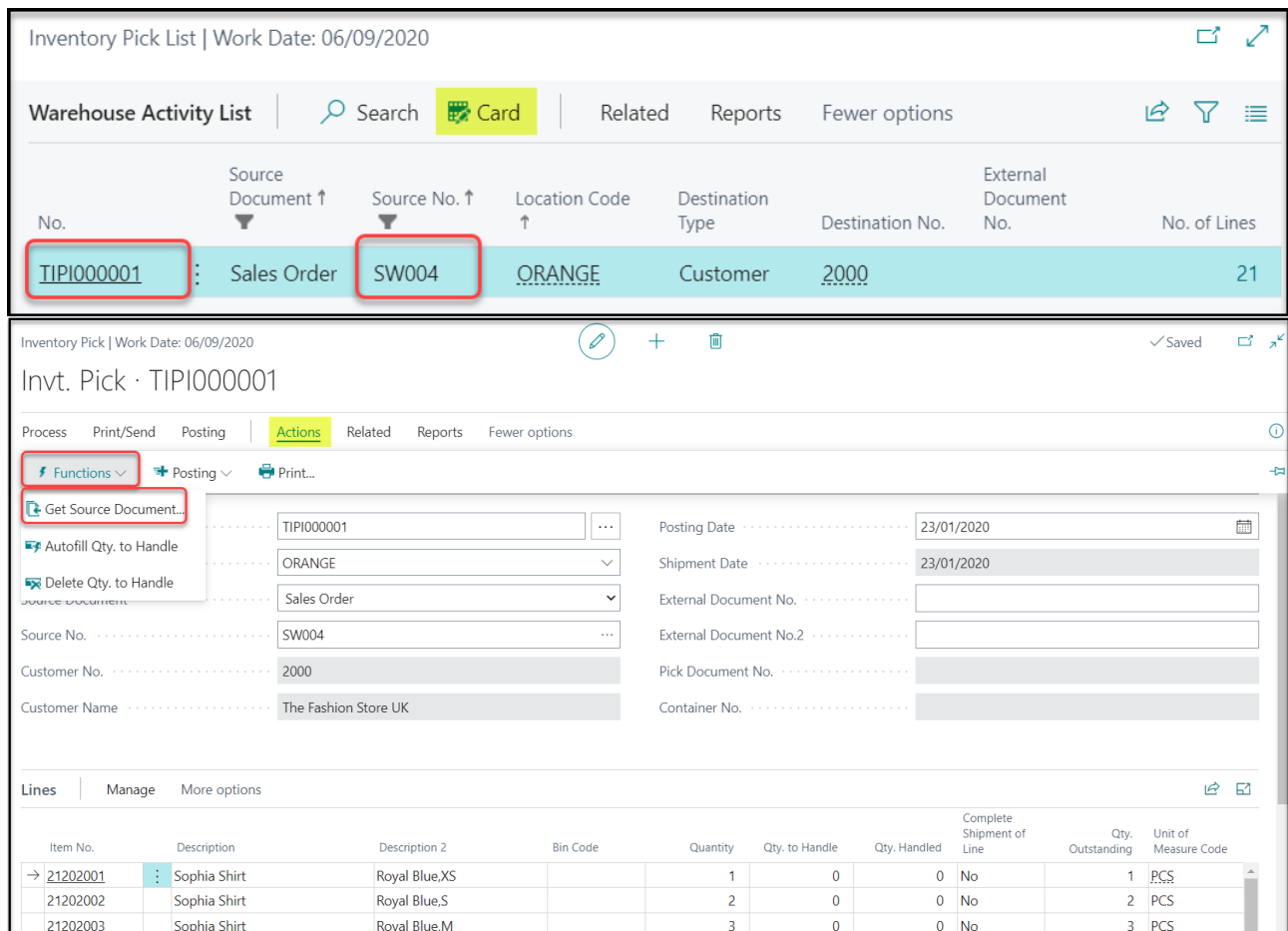
Order Date 23/01/2020 Ignore Blocking

Due Date 23/01/2020 Skip Availability Check

Requested Delivery Date Order Type

External Document No. Collection No.

Then a Page with all appropriate Inventory Picks is shown. In this case we have only one. After selecting the appropriate Line, you can press on Card to see the Inventory Pick Page. By clicking **Actions, Functions, Get Source Document...** it is possible to go from the Inventory Put-away document to the related Purchase Order document(s).



Inventory Pick List | Work Date: 06/09/2020

Warehouse Activity List Search Card Related Reports Fewer options

No.	Source Document	Source No.	Location Code	Destination Type	Destination No.	External Document No.	No. of Lines
TIPI000001	Sales Order	SW004	ORANGE	Customer	2000		21

Inventory Pick | Work Date: 06/09/2020

Inv. Pick · TIPI000001

Process Print/Send Posting **Actions** Related Reports Fewer options

Functions Posting Print...

Get Source Document...

Autofill Qty. to Handle

Delete Qty. to Handle

Source No. SW004

Customer No. 2000

Customer Name The Fashion Store UK

Posting Date 23/01/2020

Shipment Date 23/01/2020

External Document No.

External Document No.2

Pick Document No.

Container No.

Lines	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Complete Shipment of Line	Qty. Outstanding	Unit of Measure Code
→	21202001	Sophia Shirt	Royal Blue,XS		1	0	0	No	1	PCS
	21202002	Sophia Shirt	Royal Blue,S		2	0	0	No	2	PCS
	21202003	Sophia Shirt	Royal Blue,M		3	0	0	No	3	PCS

The next step is to enter in the Lines the **Qty. to Handle** for all the products that have been picked. That can also be done automatically by clicking **Actions, Functions, Autofill Qty. to Handle**. After that, the **Inventory Pick** can be posted by clicking **Posting** and then select **Ship** or **Ship&Invoice** followed by **OK**.

Inventory Pick | Work Date: 06/09/2020

Inv. Pick · TIPI000001

Process Print/Send Posting Actions Related Reports Fewer options

Functions Posting Print...

Get Source Document... The Fashion Store UK Container No.

Autofill Qty. to Handle

Delete Qty. to Handle

Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Complete Shipment of Line	Qty. Outstanding	Unit of Measure Code
21202001	Sophia Shirt	Royal Blue,XS		1	0	0	No	1	PCS
21202002	Sophia Shirt	Royal Blue,S		2	0	0	No	2	PCS
21202003	Sophia Shirt	Royal Blue,M		3	0	0	No	3	PCS

INVENTORY PICK AND -PUT-AWAY FROM TRIMIT CONTAINERS

In the paragraphs above all processes described are working according to standard BC. We only made it possible to work on TRIMIT. For instance: handling the Matrix Line. In this paragraph is described how this basic Warehousing functionality of Inventory Pick and Put-away is integrated with the TRIMIT Containers.

In the example below, we have attached Sales Orders on **Location Code ORANGE** and a Sales Order on **Location Code BLACK** to a Container. To do so, you may have to change in the **Inventory Setup** the Parameter **Sales/Container Management** to *Via Container Management*. In that case, the shipping always goes via Containers, and you are not able to connect a TRIMIT Pick Document to a Container in a TRIMIT Pick Document itself. Existing Pick Documents need to be removed or posted.

Inventory Setup

General Posting Journal Templates More options

Inventory

Filter Transfer Order Search Order Overlying Level

Use Customer/Vendor Language Code

Phys. Inventory Journal

Use TRIMIT Calculate Inventory Report

Maintenance

Automatic Update Item from Master 100

Automatic Update SKU from Master S... .. 19

Pick

Delete Pick by Posting Pick Document Header

Set Quantity Picked Quantity Picked = 0

Pick Set Await Posting Default

Sales Posting Derived from Pick Ship and Invoice

Suppress Dialogs at Pick Update & Po... ..

Sales/Container Management Via Container Management

NOTE

The setup above is only for outbound Containers. It is always possible to create *Inbound* Containers from Purchase Orders with no specific setup change.

Let us have a look first at **Container CONT00005**, which is an *Outbound* Container. By setting up the appropriate Filter for **Customer 2000** we have attached the lines (by clicking **Attach Line**) of Sales Order **SW005** to this Container. The content of the Container can be viewed by clicking on **Container Content**. After the Lines are attached, the Container **Status** should be put on *Ready* (or *Transport*).

Container Card | Work Date: 06/09/2020

CONT00005

Container Content
Set Status to Ready
Container Content
Workflow
Attach Lines
Update Date
Recalculate Info
Post Container

General

No.
CONT00005

Status
Ready

Type
Outbound

Status Code

Container ID
2000-SW005

Shipping Agent Code

Description
Customer 2000/SO SW005

Attached to Container No.

Description 2
Port of Chennai -> Port of London

Lines Attached

Dates >

Info >

Filter

Filter Vendor/Customer
2000

Season Filter

Edit - Container Content

Search
New
Edit List
Actions
Related
Fewer options

Container No. ↑	Origin ↑	Document No. ↑	Type	No.	Location Code	Description	Description 2	Quantity	Unit of Measure Code	Shipped Quantity	Received Quantity
→ CONT00005	Sales Order	SW005	Matrix	2120	ORANGE	Sophia Shirt		21	PCS		
CONT00005	Sales Order	SW005	Item	21202001	ORANGE	Sophia Shirt	Royal Blue,XS	1	PCS		
CONT00005	Sales Order	SW005	Item	21202002	ORANGE	Sophia Shirt	Royal Blue,S	1	PCS		
CONT00005	Sales Order	SW005	Item	21202003	ORANGE	Sophia Shirt	Royal Blue,M	1	PCS		
CONT00005	Sales Order	SW005	Item	21202004	ORANGE	Sophia Shirt	Royal Blue,L	1	PCS		
CONT00005	Sales Order	SW005	Item	21202005	ORANGE	Sophia Shirt	Royal Blue,XL	1	PCS		
CONT00005	Sales Order	SW005	Item	21202006	ORANGE	Sophia Shirt	Royal Blue,XXL	1	PCS		
CONT00005	Sales Order	SW005	Item	21202007	ORANGE	Sophia Shirt	Royal Blue,3XL	1	PCS		
CONT00005	Sales Order	SW005	Item	21202101	ORANGE	Sophia Shirt	Light Blue,XS	1	PCS		
CONT00005	Sales Order	SW005	Item	21202102	ORANGE	Sophia Shirt	Light Blue,S	1	PCS		
CONT00005	Sales Order	SW005	Item	21202103	ORANGE	Sophia Shirt	Light Blue,M	1	PCS		
CONT00005	Sales Order	SW005	Item	21202104	ORANGE	Sophia Shirt	Light Blue,L	1	PCS		
CONT00005	Sales Order	SW005	Item	21202105	ORANGE	Sophia Shirt	Light Blue,XL	1	PCS		

NOTE

If Matrix Lines are involved in the Container Content List, it is possible to **Collapse** or **Explode** the Line. You can find that Function under **Actions, Manage**.

It is possible to have Sales- or Purchase Lines attached to a Container with various Locations, but only the lines with Locations like **ORANGE** will be transferred to the **Inventory Pick or Put-away**. To do so, you will have to click **Actions, Warehouse, Create Inventory Put-away/ Pick**. A message will pop up that shows you the Number of Inventory Picks that are created. Click **OK** button afterwards.

Container Card | Work Date: 06/09/2020

CONT00005

Container Content | Set Status to Ready | Container Content | Workflow | Attach Lines | Update Date | Recalculate Info | Post Container | Comments | **Actions** | Related | ...

User Defined | Functions | Posting | **Warehouse**

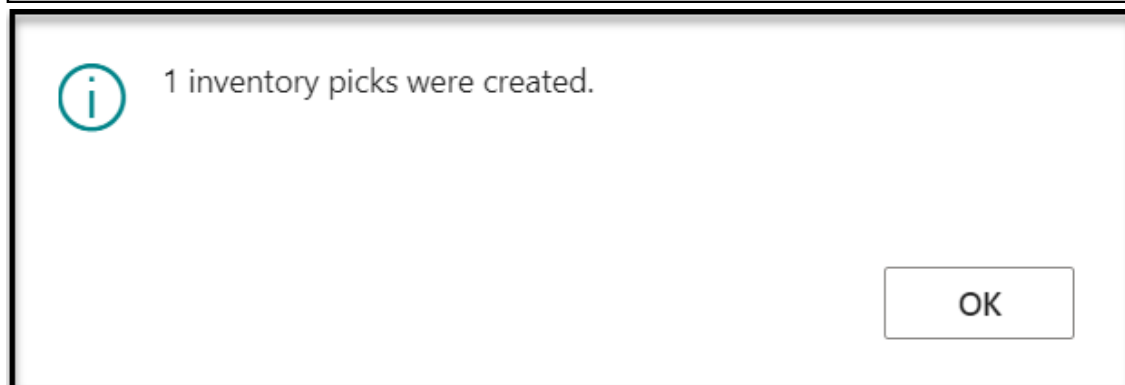
No. CONT00005 | Create Whse. Receipt/Shipment | Status Ready

Type Outbound | Create Inventory Put-away/Pick | Status Code

Container ID 2000-SW005 | Shipping Agent Code

Description Customer 2000/SO SW005 | Attached to Container No.

Description 2 Port of Chennai -> Port of London | Lines Attached



You can search for this Inventory Pick in the Inventory Pick List and look for the appropriate Inventory Pick, but there is also a direct link to this Inventory Pick from the Container itself. Then you must click as shown in the screenshot below: **Related, Warehouse, Inv. Put-away/Pick Lines**.

Container Card | Work Date: 06/09/2020

CONT00005

Container Content | Set Status to Ready | Container Content | Workflow | Attach Lines | Update Date | Recalculate Info | Post Container | Comments | Actions | **Related** | ...

Container | **Warehouse**

No. CONT00005 | Whse. Receipt Lines | Status Ready

Type Outbound | Whse. Shipment Lines | Status Code

Container ID 2000-SW005 | **Inv. Put-away/Pick Lines** | Shipping Agent Code

Description Customer 2000/SO SW005 | Attached to Container No.

Description 2 Port of Chennai -> Port of London | Lines Attached

A table with the **Warehouse Activity Lines** opens. You can click on **Card** to open the appropriate Inventory Pick Document. From there you can continue the process as described in the paragraph [Inventory Pick on Sales Order](#).

Inventory Pick Lines | Work Date: 06/09/2020

Warehouse Activity Lines | Search Card Show Whse. Document Related Fewer options

No.	Line No.	Source No. ↑	Source Line No. ↑	Source Document	Location Code	Shelf No.	Item No.	Unit of Measure Code ↑	Qty. per Unit of Measure	Description	Quantity
TIPI000002	90000	SW005	14920	Sales Order	ORANGE		21202102	PCS	1	Sophia Shirt	1
TIPI000002	100000	SW005	15158	Sales Order	ORANGE		21202103	PCS	1	Sophia Shirt	1
TIPI000002	110000	SW005	15396	Sales Order	ORANGE		21202104	PCS	1	Sophia Shirt	1
TIPI000002	120000	SW005	15634	Sales Order	ORANGE		21202105	PCS	1	Sophia Shirt	1
TIPI000002	130000	SW005	15872	Sales Order	ORANGE		21202106	PCS	1	Sophia Shirt	1
TIPI000002	140000	SW005	16110	Sales Order	ORANGE		21202107	PCS	1	Sophia Shirt	1
TIPI000002	150000	SW005	16904	Sales Order	ORANGE		21209901	PCS	1	Sophia Shirt	1
TIPI000002	160000	SW005	17142	Sales Order	ORANGE		21209902	PCS	1	Sophia Shirt	1
TIPI000002	170000	SW005	17380	Sales Order	ORANGE		21209903	PCS	1	Sophia Shirt	1
TIPI000002	180000	SW005	17618	Sales Order	ORANGE		21209904	PCS	1	Sophia Shirt	1
TIPI000002	190000	SW005	17856	Sales Order	ORANGE		21209905	PCS	1	Sophia Shirt	1
TIPI000002	200000	SW005	18094	Sales Order	ORANGE		21209906	PCS	1	Sophia Shirt	1
TIPI000002	210000	SW005	18332	Sales Order	ORANGE		21209907	PCS	1	Sophia Shirt	1

NOTE

Only for Locations like **ORANGE** **Inventory Pick Lines** will be created if there is Stock to pick. Therefore, for the example above, you should have posted the Inventory Put-away from the Purchase Order **PW0001**. Locations that have other Warehouse regimes – such as **BLACK**, **GREY** and **GREEN** – no **Inventory Pick Lines** will be created.

Above we have described the creation of an Inventory Pick from an Outbound Container based on Sales Lines. The process is comparable for creating **Inventory Put-aways** from an Inbound Container based on **Purchase Lines**. The third Container type is based on **Transfer Order Lines**. For the Inbound Transfer Lines an **Inventory Put-away** can be created and for the Outbound Transfer Lines an **Inventory Pick**. Needless to say, the **Warehouse Activity Lines** should have a **Location** like **ORANGE** with the appropriate setup.

INVENTORY PICK FROM TRIMIT PICK DOCUMENT

The purpose of the **TRIMIT Pick Document** is to allocate the products to a Sales Order. This is especially important when there are shortages. After the allocation, you can decide whether you want to use the TRIMIT Pick document as a Warehouse Document from which the products can be physically picked (for instance from **Location BLUE**) or that the standard BC warehousing should take over.

NOTE

Allocation of the Products to Sales Orders should be a Sales decision! Creating the TRIMIT Pick Document is therefore usually done by the Sales Department. The actual pick is an activity done by the Warehouse. Therefore, between the TRIMIT Pick Document and the Inventory Pick you can draw a virtual line that separates the Sales Department from the Warehouse.

As you can see there is a **Released Sales Order SW006** on **Location Code ORANGE**. For some of the sold Items there will not be enough stock. This is something that the **TRIMIT Pick Document** should calculate with, to get the appropriate quantities on the Inventory Picks. This is shown below.

Sales Order | Work Date: 06/09/2020

SW006 · The Fashion Store UK

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

General > 23/01/2020 23/01/2020 23/01/2020 Released

Exp... Mat...	Type	No.	Item Reference No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	VAT Area C
→	Matrix	2120		Sophia Shirt		ORANGE	210	PCS	34.99	
☐	Item	21202001		Sophia Shirt	Royal Blue,XS	ORANGE	10	PCS	35.99	
☐	Item	21202002		Sophia Shirt	Royal Blue,S	ORANGE	10	PCS	35.99	
☐	Item	21202003		Sophia Shirt	Royal Blue,M	ORANGE	10	PCS	35.99	
☐	Item	21202004		Sophia Shirt	Royal Blue,L	ORANGE	10	PCS	35.99	
☐	Item	21202005		Sophia Shirt	Royal Blue,XL	ORANGE	10	PCS	35.99	
☐	Item	21202006		Sophia Shirt	Royal Blue,XXL	ORANGE	10	PCS	35.99	
☐	Item	21202007		Sophia Shirt	Royal Blue,3XL	ORANGE	10	PCS	35.99	
☐	Item	21202101		Sophia Shirt	Light Blue,XS	ORANGE	10	PCS	35.99	
☐	Item	21202102		Sophia Shirt	Light Blue,S	ORANGE	10	PCS	35.99	
☐	Item	21202103		Sophia Shirt	Light Blue,M	ORANGE	10	PCS	35.99	
☐	Item	21202104		Sophia Shirt	Light Blue,L	ORANGE	10	PCS	35.99	

Let us create a new **TRIMIT Pick Document**. In this case we only want to see the effect on **Sales Order SW006**, so we put that Order No. in the Filter as shown below. We also do not want the system to add the Pick Document lines to existing Inventory Picks, so we must make sure of that.

After clicking on **+ New Pick Document** (in Role **TRIMIT Small Business**) or using **Tell me Create Sales Order Pick Document**, we fill the Request Page as shown below.

Actions

- + New Sales Order
- + New Sales Credit Memo
- + New Complaint
- + New Purchase Order
- + New Purchase Credit Memo
- + New Pick Document
- + New Master by Wizard
- > Sales Statistics
- > Task
- > Find
- > Setup
- > TRIMIT Help
- Reports

Create Sales Order Pick Document

Include Lines not Available: No

Suggest Bin: ☐

Sorting: Customer Allocation Priority

Pick Document Limitation: ☐

Add to existing Pick Documents: No

Filter: Sales Header

* No.: SW006

* Document Type:

* Sell-to Customer No.:

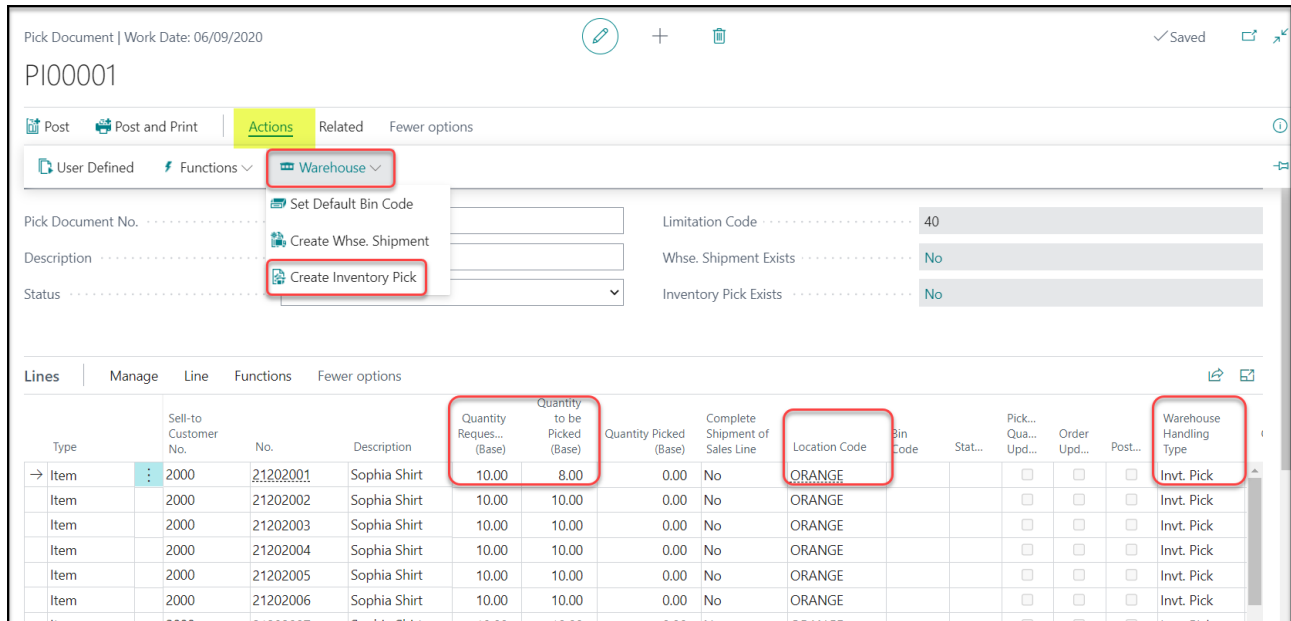
+ Filter...

Schedule... OK Cancel

Next, we go to Pick Documents (in Role **TRIMIT Small Business**) or use **Tell me Pick Documents** and notice that a **Pick Document** has been created. Let us open this document and have a look at the result of the Calculation.

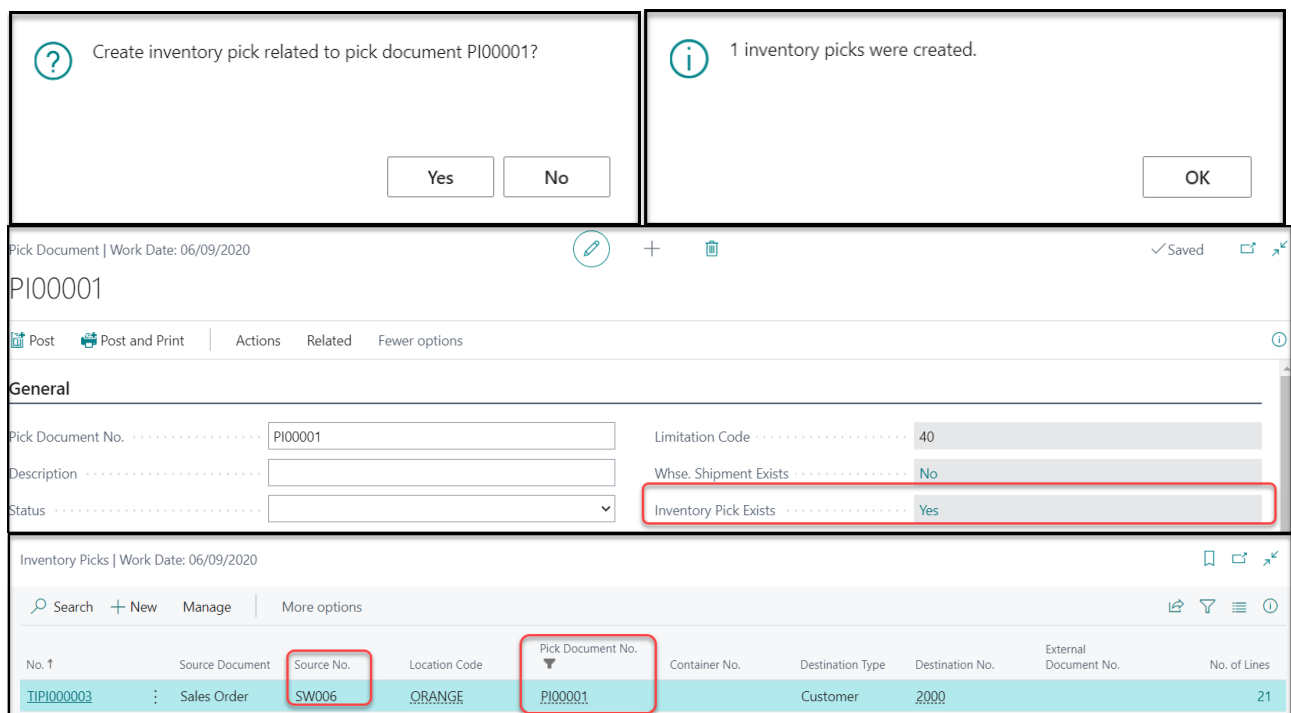
CRONUS RKL Finance Sales Purchase Product Design Logistics Production Portals Posted Documents											
Customers Vendors Sales Orders Complaints Purchase Orders Masters Pick Documents											
CRONUS RKL Finance Sales Purchase Product Design Logistics Production Portals Posted Documents											
Pick Documents: All Search New Delete Edit List More options											
Pick Document No. ↑	Limitation Code	Shipping Agent Code	Shipping Agent Name	Description	No. Series	Status	Quantity to be Picked (Base)	Quantity Picked (Base)	Net Weight	Gross Weight	Part
P100001	40				PICKDOC		201.00	0.00	100.50	110.55	

If you take a good look, you can see that some of the **Quantity to be Picked (Base)** are different from the quantities on the Sales Order (**Quantity Requested (Base)**). This is the result of not having enough stock. Notice that the **Warehouse Handling Type** is *Inv. Pick* because the **Location Code** is *ORANGE*.



Type	Item	Quantity Requested (Base)	Quantity to be Picked (Base)	Quantity Picked (Base)	Complete Shipment of Sales Line	Location Code	Bin Code	Stat...	Pick... Qua... Upd...	Order Upd...	Post...	Warehouse Handling Type
Item	2000	10.00	8.00	0.00	No	ORANGE						Inv. Pick
Item	2000	10.00	10.00	0.00	No	ORANGE						Inv. Pick
Item	2000	10.00	10.00	0.00	No	ORANGE						Inv. Pick
Item	2000	10.00	10.00	0.00	No	ORANGE						Inv. Pick
Item	2000	10.00	10.00	0.00	No	ORANGE						Inv. Pick
Item	2000	10.00	10.00	0.00	No	ORANGE						Inv. Pick

From the **Pick Document** we create an **Inventory Pick** by clicking: **Actions, Warehouse, Create Inventory Pick**. We get two warnings; click **Yes** first and then **OK**. The Inventory Pick is confirmed. Back in the Pick Document we can see that Inventory Picks Exist. By clicking on the field **Inventory Pick Exist**, you can drill down to see in the Inventory Picks List with the appropriate **Inventory Pick**. Clicking on that field will show you the Inventory Pick. (You can also go there by clicking **Related, Warehouse, Inv. Pick Lines** and from there click **Card**.)



Create inventory pick related to pick document PI00001?

Yes No

1 inventory picks were created.

OK

Pick Document | Work Date: 06/09/2020

PI00001

Post Post and Print Actions Related Fewer options

General

Pick Document No. PI00001 Limitation Code 40

Description Whse. Shipment Exists No

Status Inventory Pick Exists Yes

Inventory Picks | Work Date: 06/09/2020

Search + New Manage More options

No. ↑	Source Document	Source No.	Location Code	Pick Document No.	Container No.	Destination Type	Destination No.	External Document No.	No. of Lines
TIPI000003	Sales Order	SW006	ORANGE	PI00001		Customer	2000		21

Inventory Pick | Work Date: 06/09/2020





✓ Saved



Invt. Pick · TPI000003

Process
Print/Send
Posting
Actions
Related
Reports
Fewer options

General

No.
TPI000003

Posting Date
23/01/2020

Location Code
ORANGE

Shipment Date
23/01/2020

Source Document
Sales Order

External Document No.

Source No.
SW006

External Document No.2

Customer No.
2000

Pick Document No.
PI00001

Customer Name
The Fashion Store UK

Container No.

Lines
Manage
More options

Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Complete Shipment of Line	Qty. Outstanding	Unit of Measure Code
→ 21202001	Sophia Shirt	Royal Blue,XS		8	0	0	No	8	PCS
21202002	Sophia Shirt	Royal Blue,S		10	0	0	No	10	PCS
21202003	Sophia Shirt	Royal Blue,M		10	0	0	No	10	PCS

From here you can handle the Inventory Pick the same way as described in the previous paragraphs. The posting of the **Inventory Pick** will also post the corresponding Lines of the **Pick Document**. The Pick Document Lines will be deleted based on a Parameter in the Inventory Setup: **Delete Pick by Posting**. If all the Pick Document Lines are deleted, also the Pick Document itself will be deleted.

BC WAREHOUSING AND TRIMIT WHOLESALE

INTRODUCTION

In this chapter, the integration of BC Basic Warehousing and TRIMIT Wholesale is discussed.

The following scenarios are included in this discussion:

- Creating Warehouse Receipt based on Purchase Orders
- Creating Warehouse Receipt/ Shipment based on TRIMIT Containers
- Creating Warehouse Shipment based on Sales Orders
- Creating Warehouse Shipment based on TRIMIT Pick Document
- Using Filters to Create Warehouse Documents

Location *GREEN* or any other Location with the Setup below are suitable for the scenarios in this chapter.

Warehouse

Require Receive

Require Shipment

Require Put-away

Use Put-away Worksheet

Require Pick

Bin Mandatory

Directed Put-away and Pick

Use ADCS

CREATING WAREHOUSE RECEIPT FROM PURCHASE ORDER

With the **Warehouse Receipt**, we can receive **Purchase Orders** into a Warehouse with the setup as shown above. TRIMIT has added to this feature the possibility to have **Matrix Lines** on the Warehouse Receipt. Below several scenarios are described how a Warehouse Receipt can be created.

The first scenario is creating a **Warehouse Receipt** directly from the **Purchase Order**. This is a standard BC way of working. The Purchase Order *PW002* is on **Location Code GREEN**. Before we are going to receive **Master 2130 (Rose Shirt)** with all its variations, the Purchase Order needs to be *Released*. After that we can create the Warehouse Receipt by clicking: **Actions, Warehouse, Create Whse. Receipt**.

Purchase Order | Work Date: 06/09/2020

PW0002 · Sewing & Stitching Lda.

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

User Defined Manage Functions Request Approval Warehouse Posting Print

Vendor Name: Sewing & Stitching Lda. Contact: José Guido Document Date: 23/01/2020 Vendor Invoice No. * Vendor Shipment No.

Order Type: Order Reference: Your Reference: Collection No.

Released

Lines Manage Line Functions Order Fewer options

Exp... Mat...	Type	No.	Item Reference No.	Description	Description 2	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Excl.
→	Matrix	2130		Rose Shirt		GREEN		640	PCS	
☐	Item	21300101		Rose Shirt	White,XS	GREEN		10	PCS	
☐	Item	21300102		Rose Shirt	White,S	GREEN		20	PCS	
☐	Item	21300103		Rose Shirt	White,M	GREEN		30	PCS	

1 Warehouse Receipt Header has been created.

OK

The creation will be confirmed by the message above. After clicking on **OK**, notice that the **Warehouse Receipt Page** has been opened automatically. You can also open an already created Warehouse Receipt from an order by clicking: **Related, Warehouse, Whse. Receipt Lines**. Select a Line and click **Show Whse. Document** to open the appropriate Warehouse Receipt Page.

Purchase Order | Work Date: 06/09/2020

PW0002 · Sewing & Stitching Lda.

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

Order Documents Warehouse

Inv. Put-away/Pick Lines

Whse. Receipt Lines

Drop Shipment

Special Order

Vendor Name: Vendor Invoice No. Vendor Shipment No.

Status: Your Reference: Order Type: Collection No.

Whse. Receipt Lines Work Date: 06/09/2020										
Source No.	Source Line No.	Item No.	Variant Code	Description	Description 2	Quantity	Qty. Outstanding	Qty. Received	Unit of Measure Code	Qty. per Unit of Measure
PW0002	10000	2130		Rose Shirt		0	0	0	PCS	
PW0002	11971	21300101		Rose Shirt	White,XS	10	10	0	PCS	
PW0002	12067	21300102		Rose Shirt	White,S	20	20	0	PCS	
PW0002	12163	21300103		Rose Shirt	White,M	30	30	0	PCS	
PW0002	12259	21300104		Rose Shirt	White,L	40	40	0	PCS	
PW0002	12355	21300105		Rose Shirt	White,XL	30	30	0	PCS	

Warehouse Receipt | Work Date: 06/09/2020
TRE000001

Process
Print/Send
Posting
Receipt
Navigate
Prepare
Actions
Related
Fewer options

General

No. TRE000001
Vendor Shipment No.
Location Code GREEN
Assigned User ID
Zone Code
Assignment Date
Bin Code
Assignment Time
Document Status
Sorting Method
Posting Date 06/09/2020
Container No.

Lines
Manage
Line
Fewer options

Exp...	Mat...	Type	Source Document	Source No.	Source Line No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Receive	Complete Receipt of Line	Status
→	☒	Matrix	Purchase ...	PW0002	10000	2130	Rose Shirt			640	640	No	
	☐	Item	Purchase Or...	PW0002	11971	21300101	Rose Shirt	White,XS		10	10	No	
	☐	Item	Purchase Or...	PW0002	12067	21300102	Rose Shirt	White,S		20	20	No	

The **Warehouse Receipt** is standard BC functionality, but TRIMIT has modified it, so that it can work with **Matrix Lines** as you can see above. This allows the user to modify the **Qty. to Receive** in a Matrix. The Matrix cells have the following format: *Qty. to Receive[Quantity(org.)]*. The original Quantity is the Outstanding Quantity on the Purchase Line when the Warehouse Receipt is created. However, it is also possible to modify the **Qty. to Receive** in the appropriate column on the individual Warehouse Receipt Lines. (See screenshot above.)

General

No. TRE000001
Vendor Shipment No.
Location Code GREEN
Assigned User ID
Zone Code
Assignment Date
Bin Code
Assignment Time
Document Status
Sorting Method
Posting Date 06/09/2020
Container No.

Lines
Manage
Line
Fewer options

Source Document Line
Bin Contents List
Item Availability by
Item Tracking Lines
Matrix Quantity

Exp...	Mat...	Type	Source Document	Source No.	Source Line No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Receive	Complete Receipt of Line	Status
→	☒	Matrix	Purchase ...	PW0002	10000	2130	Rose Shirt			640	640	No	
	☐	Item	Purchase Or...	PW0002	11971	21300101	Rose Shirt	White,XS		10	10	No	
	☐	Item	Purchase Or...	PW0002	12067	21300102	Rose Shirt	White,S		20	20	No	

Edit - - No. 2130 - Rose Shirt -										
Search New Edit List Process Open in Excel Related Fewer options										
Variant 1	Variant Description	Line Quantity	XS	S	M	L	XL	XXL	3XL	
→ 01	White	160	10 [10]	20 [20]	30 [30]	40 [40]	30 [30]	20 [20]	10 [10]	
30	Yellow	160	10 [10]	20 [20]	30 [30]	40 [40]	30 [30]	20 [20]	10 [10]	
65	Lawn Green	160	10 [10]	20 [20]	30 [30]	40 [40]	30 [30]	20 [20]	10 [10]	
99	Black	160	10 [10]	20 [20]	30 [30]	40 [40]	30 [30]	20 [20]	10 [10]	

The next step is to receive the Items for real. For this, we need to post the receipt by clicking: **Actions, Posting, Post Receipt**. You can also choose one of the other options in the green frame, if you want to combine the posting with a printed document. When posting, the system asks for a confirmation. Click **Yes** and the posting will be executed.

Warehouse Receipt | Work Date: 06/09/2020

TRE000001

Process

Print/Send

Posting

Receipt

Navigate

Prepare

Actions

Related

Fewer options

Manage

Functions

Posting

Print...

Post Receipt

Post and Print

Post and Print Put-away

No.

Location Code

Zone Code

Bin Code

Document Status

Posting Date 06/09/2020

Vendor Shipment No.

Assigned User ID

Assignment Date

Assignment Time

Sorting Method

Container No.

Note that on **Location Code GREEN** we have setup, that we want to work with a **Put-away**. Therefore, after posting the **Receipt**, a Put-away will be created that will bring the received Items further into the Warehouse. So, in this case we get a confirmation that a **Put-away** has been created. Press **OK**, if you want to continue.

Do you want to post the receipt?

Yes

No

Number of source documents posted: 1 out of a total of 1.

Number of put-away activities created: 1.

OK

After Posting the Receipt, the **Warehouse Receipt** is deleted (because all the **Qty. to Receive** was equal to the **Quantity**) and you are back again in the Purchase Order **PW0002** from which you started.

HANDLING PUT-AWAY FOR BASIC WAREHOUSING

You can find the Put-away in the **Warehouse Put-away List**. Below we can see the screenshot of the Put-away created from the **Warehouse Receipt** in the previous paragraph. If the Put-away has not been registered, the Items are not available for picking. For this we need to **Register the Put-away**. That means that the **Qty. to Handle** will be registered on eventual chosen Bins.

Warehouse Put-away | Work Date: 06/09/2020

+

✓ Saved

Put-away · TPU000001

Register Put-away

Print...

Registered Put-aways

More options

General

No. TPU000001

Assignment Date

Location Code GREEN

Assignment Time

Breakbulk Filter ☐

Sorting Method

Assigned User ID

Lines

Manage

More options

Action Type	Source Document	Source No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Our
→	Purchase Or...	PW0002	21300101	Rose Shirt	White,XS		10	10	0	
	Purchase Or...	PW0002	21300102	Rose Shirt	White,S		20	20	0	
	Purchase Or...	PW0002	21300103	Rose Shirt	White,M		30	30	0	
	Purchase Or...	PW0002	21300104	Rose Shirt	White,L		40	40	0	
	Purchase Or...	PW0002	21300105	Rose Shirt	White,XL		30	30	0	
	Purchase Or...	PW0002	21300106	Rose Shirt	White,XXL		20	20	0	
	Purchase Or...	PW0002	21300107	Rose Shirt	White,3XL		10	10	0	

?

Do you want to register the Put-away Document?

Yes

No

For the rest of the process described in this White Paper we need to register this Put-away, so click **Yes** in the confirmation that pops up after registering. After registering, the **Put-away** document will be deleted.

NOTE

Handling the Put-away is a process that is completely according to standard BC. However, the **Warehouse Put-away** does not have a Matrix functionality. Working in Lines is more appropriate for Warehouse Activities, because for the Warehouse Employee every SKU is unique since it has its own Barcode and Bin.

CREATING WAREHOUSE SHIPMENT/ RECEIPT FROM CONTAINER

In **TRIMIT Container Management**, also functionality has been added for Warehousing.

Sales-, Transfer- and Purchase Order Lines can be attached to a specific **Container**. Make sure that these Orders are *Released*. The process of creating a Warehouse Shipment from an Outbound Container is identical to that of the Warehouse Receipt. In this paragraph, we will discuss the creation of a **Warehouse Receipt** from a Container.

Let us have a look first to **Container CONT00006**, which is an *Inbound* Container. By setting up the appropriate Filter for **Vendor 2000** we have attached the Lines (by clicking **Attach Line**) of Purchase Order *PW0003* to this Container. The content of the Container can be viewed by clicking **Container Content**. After the Lines are attached, the Container **Status** should be put on *Ready* or *Transport* before we can receive.

Container Card | Work Date: 06/09/2020

CONT00006

Container Content

Set Status to Ready

Container Content

Workflow

Attach Lines

Update Date

Recalculate Info

Post Container

Comments

General

No. CONT00006

Status Transport

Type Inbound

Status Code

Container ID 2000-PW0003

Shipping Agent Code

Description Vendor 2000/PW0003

Attached to Container No.

Description 2 Port of Chennai -> Port of London

Lines Attached

Dates

Info

Filter

Filter Vendor/Customer 2000

Season Filter

Filter Document No.

Filter From-Location

Edit - Container Content

Search

New

Edit List

Actions

Related

Fewer options

Container No. ↑	Origin ↑	Document No. ↑	Type	No.	Location Code	Description	Description 2	Quantity	Unit of Measure Code
CONT00006	Purchase ...	PW0003	Matrix	2130	GREEN	Rose Shirt		640	PCS
CONT00006	Purchase Or...	PW0003	Item	21300101	GREEN	Rose Shirt	White,XS	10	PCS
CONT00006	Purchase Or...	PW0003	Item	21300102	GREEN	Rose Shirt	White,S	20	PCS
CONT00006	Purchase Or...	PW0003	Item	21300103	GREEN	Rose Shirt	White,M	30	PCS
CONT00006	Purchase Or...	PW0003	Item	21300104	GREEN	Rose Shirt	White,L	40	PCS
CONT00006	Purchase Or...	PW0003	Item	21300105	GREEN	Rose Shirt	White,XL	30	PCS
CONT00006	Purchase Or...	PW0003	Item	21300106	GREEN	Rose Shirt	White,XXL	20	PCS
CONT00006	Purchase Or...	PW0003	Item	21300107	GREEN	Rose Shirt	White,3XL	10	PCS
CONT00006	Purchase Or...	PW0003	Item	21303001	GREEN	Rose Shirt	Yellow,XS	10	PCS
CONT00006	Purchase Or...	PW0003	Item	21303002	GREEN	Rose Shirt	Yellow,S	20	PCS
CONT00006	Purchase Or...	PW0003	Item	21303003	GREEN	Rose Shirt	Yellow,M	30	PCS

It is possible to have Sales- or Purchase Lines attached to a Container with various Locations, but only the lines with Locations setup as **GREEN** will be transferred to the **Warehouse Shipment** or **-Receipt**. To do so in this case, you will have click **Actions, Warehouse, Create Whse. Receipt/Shipment**. A message will pop up that shows you the Number of Warehouse Receipts that are created. Push **OK** button afterwards.

Container Card | Work Date: 06/09/2020

CONT00006

Container Content

Set Status to Ready

Container Content

Workflow

Attach Lines

Update Date

Recalculate Info

Post Container

Comments

Actions

Related

User Defined

Functions

Posting

Warehouse

No.

CONT00006

Create Whse. Receipt/Shipment

Type

Inbound

Create Inventory Put-away/Pick

Container ID

2000-PW0003

Description

Vendor 2000/PW0003

Description 2

Port of Chennai -> Port of London

Status

Transport

Status Code

Shipping Agent Code

Attached to Container No.

Lines Attached

☐

1 warehouse receipts have been created.

OK

It is possible to navigate to the created **Warehouse Receipt Lines** by clicking **Actions, Warehouse, Whse. Receipt Lines**. (When necessary, this pathway could be made shorter during an implementation). From the Warehouse Receipt Lines, you can select a Line and click **Show Whse. Document** and go to the **Receipt**.

Container Card | Work Date: 06/09/2020

CONT00006

Container Content

Set Status to Ready

Container Content

Workflow

Attach Lines

Update Date

Recalculate Info

Post Container

Comments

Actions

Related

Container

Warehouse

Whse. Receipt Lines

Whse. Shipment Lines

Invt. Put-away/Pick Lines

No.

INT00006

Status

Transport

Type

bound

Status Code

Container ID

00-PW0003

Shipping Agent Code

Description

Vendor 2000/PW0003

Attached to Container No.

Description 2

Port of Chennai -> Port of London

Lines Attached

Whse. Receipt Lines | Work Date: 06/09/2020

Search

Show Whse. Document

More options

Source No. ↑	Source Line No. ↑	Item No.	Variant Code	Description	Description 2	Quantity	Qty. Outstanding	Qty. Received	Unit of Measure Code	Qty. per Unit Measure
PW0003	11971	21300101		Rose Shirt	White,XS	10	10	0	PCS	
PW0003	12067	21300102		Rose Shirt	White,S	20	20	0	PCS	
PW0003	12163	21300103		Rose Shirt	White,M	30	30	0	PCS	
PW0003	12259	21300104		Rose Shirt	White,L	40	40	0	PCS	
PW0003	12355	21300105		Rose Shirt	White,XL	30	30	0	PCS	
PW0003	12451	21300106		Rose Shirt	White,XXL	20	20	0	PCS	
PW0003	12547	21300107		Rose Shirt	White,3XL	10	10	0	PCS	
PW0003	13846	21303001		Rose Shirt	Yellow,XS	10	10	0	PCS	

Warehouse Receipt | Work Date: 06/09/2020

TRE000002

Process Print/Send **Posting** Receipt Navigate Prepare Actions Related Fewer options

Post Receipt Post and Print Post and Print Put-away

No. TRE000002 Vendor Shipment No.

Location Code GREEN Assigned User ID

Zone Code Assignment Date

Bin Code Assignment Time

Document Status Sorting Method

Posting Date 06/09/2020 Container No. CONT00006

Lines Manage Line Fewer options

Exp... Mat...	Type	Source Document	Source No.	Source Line No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Receive	Complete Receipt of Line	Status
→	☒ Matrix	Purchase ...	PW0003	10000	2130	Rose Shirt			640	640	No	
	☐ Item	Purchase Or...	PW0003	11971	21300101	Rose Shirt	White,XS		10	10	No	
	☐ Item	Purchase Or...	PW0003	12067	21300102	Rose Shirt	White,S		20	20	No	

From the **Warehouse Receipt** you can create the **Put-away** (by posting the Receipt) and process the Warehouse document as you would in standard BC Warehousing as described in the previous paragraph [Handling Put-away for Basic Warehousing](#).

NOTE

If a **Container** has **Status Partly Posted**, you cannot create Warehouse Receipts or Shipments.

CREATING WAREHOUSE SHIPMENT FROM SALES ORDER

In this scenario, we will create a Warehouse Shipment directly from the Sales Order. The starting point will be **Released Sales Order SW007** on **Location Code GREEN**.

Sales Order | Work Date: 06/09/2020

SW007 · Sportswear A/S

Process Release Posting Prepare Order Request Approval Print/Send Navigate **Actions** Related Fewer options

User Defined Manage Functions Plan Request Approval **Warehouse** Posting Print Order Confirmation

Customer Name Sportswear A/S **Released**

Contact H.C. Andersen **Create Warehouse Shipment**

Posting Date 23/01/2020 Blocked

Order Date 23/01/2020 Ignore Blocking

Due Date 13/02/2020 Skip Availability Check

Requested Delivery Date Order Type

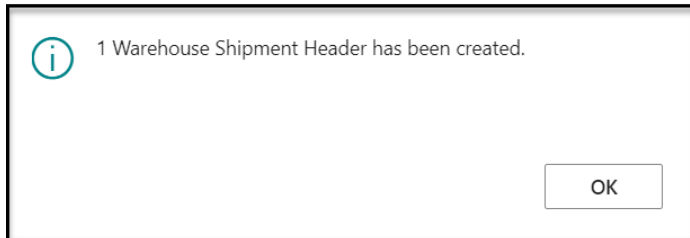
External Document No. Collection No.

Lines Manage Line Order Fewer options

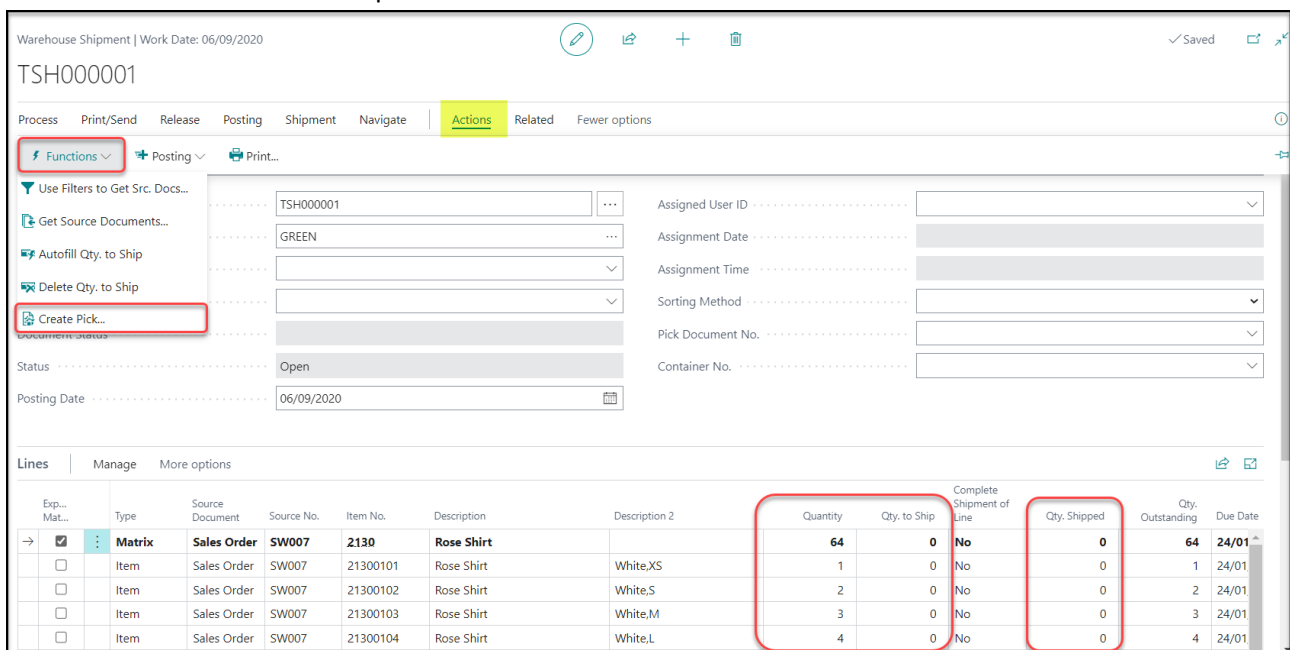
Exp... Mat...	Type	No.	Item Reference No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	VAT Area Code	VAT Group Code	Link
→	☒ Matrix	2130		Rose Shirt		GREEN	64	PCS	7.00			
	☐ Item	21300101		Rose Shirt	White,XS	GREEN	1	PCS	7.00			
	☐ Item	21300102		Rose Shirt	White,S	GREEN	2	PCS	7.00			
	☐ Item	21300103		Rose Shirt	White,M	GREEN	3	PCS	7.00			
	☐ Item	21300104		Rose Shirt	White,L	GREEN	4	PCS	7.00			

From this **Sales Order** we can create a **Warehouse Shipment** by clicking: **Actions, Warehouse, Create Warehouse Shipment**.

This is just according to standard BC procedure. After you have done this, a message confirms how many **Shipment Headers** are created. Click **OK** to continue. The system has automatically opened the **Warehouse Shipment** that has been created.



Looking at the **Warehouse Shipment**, you can see that TRIMIT has added the **Matrix** functionality to it. If the **Qty. to Ship** is still 0, the Shipment Lines cannot be posted. On **Location Code GREEN**, we must create a **Warehouse Pick** from the **Warehouse Shipment** first by clicking: **Actions, Functions, Create Pick....** This is the normal standard BC procedure.



Warehouse Shipment | Work Date: 06/09/2020

TSH000001

Process Print/Send Release Posting Shipment Navigate **Actions** Related Fewer options

Functions Posting Print...

Use Filters to Get Src. Docs... TSH000001 ... Assigned User ID ...

Get Source Documents... GREEN ... Assignment Date ...

Autofill Qty. to Ship ... Assignment Time ...

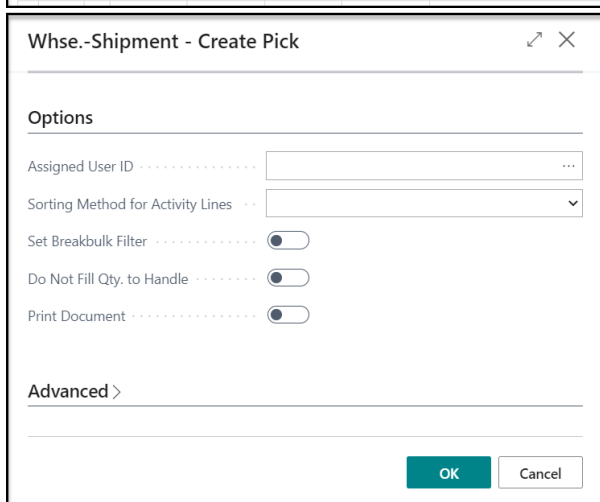
Delete Qty. to Ship ... Sorting Method ...

Create Pick... ... Pick Document No. ...

Status ... Open ... Container No. ...

Posting Date ... 06/09/2020 ...

Exp... Mat...	Type	Source Document	Source No.	Item No.	Description	Description 2	Quantity	Qty. to Ship	Complete Shipment of Line	Qty. Shipped	Qty. Outstanding	Due Date	
→	☒	Matrix	Sales Order	SW007	2130	Rose Shirt		64	0	No	0	64	24/01
	☐	Item	Sales Order	SW007	21300101	Rose Shirt	White,XS	1	0	No	0	1	24/01
	☐	Item	Sales Order	SW007	21300102	Rose Shirt	White,S	2	0	No	0	2	24/01
	☐	Item	Sales Order	SW007	21300103	Rose Shirt	White,M	3	0	No	0	3	24/01
	☐	Item	Sales Order	SW007	21300104	Rose Shirt	White,L	4	0	No	0	4	24/01



Whse.-Shipment - Create Pick

Options

Assigned User ID ...

Sorting Method for Activity Lines ...

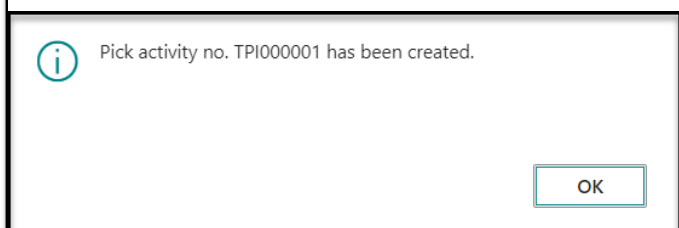
Set Breakbulk Filter ...

Do Not Fill Qty. to Handle ...

Print Document ...

Advanced >

OK Cancel



You can fill the **Options** before creating the **Warehouse Pick** as in standard BC. Then click **OK**.

Then a message confirms that a Warehouse Pick has been created. After confirming this message by clicking **OK** we can have a look at the **Warehouse Pick** by clicking: **Related, Shipment, Pick Lines**. And from the Pick Lines select a Line and then click **Card**.

Warehouse Pick Lines | Work Date: 06/09/2020

Warehouse Activity Lines | Search | **Card** | Show Whse. Document | More options

No.	Line No.	Source No.	Source Line No.	Source Document	Location Code	Shelf No.	Item No.	Unit of Measure Code	Qty. per Unit of Measure	Description	Quantity	Qty. (Base)	Outstand
TPI000001	10000	SW007	11971	Sales Order	GREEN		21300101	PCS	1	Rose Shirt	1	1	
TPI000001	20000	SW007	12067	Sales Order	GREEN		21300102	PCS	1	Rose Shirt	2	2	
TPI000001	30000	SW007	12163	Sales Order	GREEN		21300103	PCS	1	Rose Shirt	3	3	
TPI000001	40000	SW007	12259	Sales Order	GREEN		21300104	PCS	1	Rose Shirt	4	4	
TPI000001	50000	SW007	12355	Sales Order	GREEN		21300105	PCS	1	Rose Shirt	3	3	
TPI000001	60000	SW007	12451	Sales Order	GREEN		21300106	PCS	1	Rose Shirt	2	2	
TPI000001	70000	SW007	12547	Sales Order	GREEN		21300107	PCS	1	Rose Shirt	1	1	
TPI000001	80000	SW007	13846	Sales Order	GREEN		213003001	PCS	1	Rose Shirt	1	1	

Edit - Warehouse Pick - Pick - TPI000001

Manage Process Print/Send Pick Navigate **Actions** Related Fewer options

Functions **Registering** Print...

Autofill Qty. to Handle TPI000001 Assignment Date

Delete Qty. to Handle GREEN Assignment Time

Breakbulk Filter Sorting Method

Assigned User ID

Lines Manage More options

Source Document	Source No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Qty. Outstanding	Due Date	Unit of Measure Code	Qty. per Unit of Measure
Sales Order	SW007	21300101	Rose Shirt	White,XS		1	1	0	1	24/01/2020	PCS	
Sales Order	SW007	21300102	Rose Shirt	White,S		2	2	0	2	24/01/2020	PCS	
Sales Order	SW007	21300103	Rose Shirt	White,M		3	3	0	3	24/01/2020	PCS	
Sales Order	SW007	21300104	Rose Shirt	White,L		4	4	0	4	24/01/2020	PCS	
Sales Order	SW007	21300105	Rose Shirt	White,XL		3	3	0	3	24/01/2020	PCS	
Sales Order	SW007	21300106	Rose Shirt	White,XXL		2	2	0	2	24/01/2020	PCS	

Close

NOTE

The Warehouse Pick does not have a Matrix functionality. This is more appropriate for Warehouse activities, because for the Warehouse Employee every SKU is unique since it has its own barcode and Bin.

Next the Warehouse Pick can be handled and registered according to standard BC. After registering the Warehouse Pick has disappeared. When you go back to the **Warehouse Shipment** the column **Qty. to Ship** is now filled based on the registered quantities of the Warehouse Pick. Now we can post the Warehouse Shipment. This is all according to standard BC warehousing.

Warehouse Shipment | Work Date: 06/09/2020

TSH000001

Process Print/Send Release Posting Shipment Navigate **Actions** Related Fewer options

Functions Post Posting Print...

Post Shipment...

Post and Print...

No. TSH000001 Assigned User ID

Location Code GREEN Assignment Date

Zone Code Assignment Time

Bin Code Sorting Method

Document Status Completely Picked Pick Document No.

Status Released Container No.

Posting Date 06/09/2020

Lines Manage More options

Exp... Mat...	Type	Source Document	Source No.	Item No.	Description	Description 2	Quantity	Qty. to Ship	Complete Shipment of Line	Qty. Shipped	Qty. Outstanding	Due Date
→	Matrix	Sales Order	SW007	2130	Rose Shirt		64	64	No	0	64	24/01
	Item	Sales Order	SW007	21300101	Rose Shirt	White,XS	1	1	No	0	1	24/01
	Item	Sales Order	SW007	21300102	Rose Shirt	White,S	2	2	No	0	2	24/01
	Item	Sales Order	SW007	21300103	Rose Shirt	White,M	3	3	No	0	3	24/01
	Item	Sales Order	SW007	21300104	Rose Shirt	White,L	4	4	No	0	4	24/01

CREATING WAREHOUSE SHIPMENT FROM TRIMIT PICK DOCUMENT

In this paragraph is described how a **Warehouse Shipment** is created from a **TRIMIT Pick Document**, which will be the basis from where we start. Only Lines in the Pick Document originating from *Released* Sales Orders with a Location with Warehousing Setup comparable to *GREEN* will be transferred to a Warehouse Shipment. In the screenshot below we see **Pick Document P100002** that is based on **Sales Order SW008**. How to create a Pick Document is described in paragraph [Inventory Pick from TRIMIT Pick Document](#), but this time instead of *SW006* we enter *SW008* in the filter. The result is shown below.

Pick Document | Work Date: 06/09/2020

P100002

Post Post and Print **Actions** Related Fewer options

User Defined Functions Warehouse

Set Default Bin Code

Create Whse. Shipment

Create Inventory Pick

Pick Document No. Limitation Code 40

Description Whse. Shipment Exists No

Status Inventory Pick Exists No

Lines Manage More options

Type	Sell-to Customer No.	No.	Description	Quantity Requested (Base)	Quantity to be Picked (Base)	Quantity Picked (Base)	Complete Shipment of Sales Line	Location Code	Bin Code	Stat...	Pick... Qua... Upd...	Order Upd...	Post...	Warehouse Handling Type	Qty. Allocated to Pick (Base)	Initiating Order No.
→	Item	2010	21300101	Rose Shirt	2.00	2.00	0.00	No	GREEN					Whse. Ship...	0.00	SW008
	Item	2010	21300102	Rose Shirt	4.00	4.00	0.00	No	GREEN					Whse. Ship...	0.00	SW008
	Item	2010	21300103	Rose Shirt	6.00	6.00	0.00	No	GREEN					Whse. Ship...	0.00	SW008
	Item	2010	21300104	Rose Shirt	8.00	8.00	0.00	No	GREEN					Whse. Ship...	0.00	SW008
	Item	2010	21300105	Rose Shirt	6.00	6.00	0.00	No	GREEN					Whse. Ship...	0.00	SW008
	Item	2010	21300106	Rose Shirt	4.00	4.00	0.00	No	GREEN					Whse. Ship...	0.00	SW008
	Item	2010	21300107	Rose Shirt	2.00	2.00	0.00	No	GREEN					Whse. Ship...	0.00	SW008
	Item	2010	21303001	Rose Shirt	2.00	2.00	0.00	No	GREEN					Whse. Ship...	0.00	SW008
	Item	2010	21303002	Rose Shirt	4.00	4.00	0.00	No	GREEN					Whse. Ship...	0.00	SW008
	Item	2010	21302002	Rose Shirt	6.00	6.00	0.00	No	GREEN					Whse. Ship...	0.00	SW008

Since Sales Order **SW008** is **Released**, the creation of **Warehousing Activities** is permitted. To do so, click: **Actions, Warehouse, Create Whse. Shipment**.

After doing so, we get a request for confirmation first. Click **Yes** on this one and on the next confirmation click **OK**.



Create warehouse shipment for pick document lines related to pick document PI00002?



1 warehouse shipments have been created.

Back in the Pick Document we click: **Related, Warehouse, Whse. Shipment Lines** to open the page with **Warehouse Shipment Lines**. Select one Line and click **Show Whse. Document** to open the appropriate **Warehouse Shipment Document**.

Pick Document | Work Date: 06/09/2020

PI00002

Post

Post and Print

Actions

Related

Fewer options

Pick Document per Order

Warehouse

Whse. Shipment Lines

Inv. Pick Lines

Pick Document No.

Description

Status

Planned

Whse. Shipment Lines | Work Date: 06/09/2020

Search

Show Whse. Document

Show Source Document Line

More options

Source No.	Source Line No.	Item No.	Variant Code	Description	Quantity	Qty. Outstanding	Qty. Picked	Unit of Measure Code	Qty. per Unit of Measure	Status	Due Date	Shipment Date	No.
SW008	14326	21303006		Rose Shirt	4	4	0	PCS	1		24/01/2020	06/09/2020	TSH000002
SW008	14422	21303007		Rose Shirt	2	2	0	PCS	1		24/01/2020	06/09/2020	TSH000002
SW008	15721	21306501		Rose Shirt	2	2	0	PCS	1		24/01/2020	06/09/2020	TSH000002
SW008	15817	21306502		Rose Shirt	4	4	0	PCS	1		24/01/2020	06/09/2020	TSH000002
SW008	15913	21306503		Rose Shirt	6	6	0	PCS	1		24/01/2020	06/09/2020	TSH000002
SW008	16009	21306504		Rose Shirt	8	8	0	PCS	1		24/01/2020	06/09/2020	TSH000002

Warehouse Shipment | Work Date: 06/09/2020

TSH000002

Process

Print/Send

Release

Posting

Shipment

Navigate

Actions

Related

Fewer options

General

No.

Location Code

Zone Code

Bin Code

Document Status

Status

Posting Date

Assigned User ID

Assignment Date

Assignment Time

Sorting Method

Pick Document No.

Container No.

Lines

Manage

More options

Exp. Mat.	Type	Source Document	Source No.	Item No.	Description	Description 2	Quantity	Qty. to Ship	Complete Shipment of Line	Qty. Shipped	Qty. Outstanding	Due Date
→	Matrix	Sales Order	SW008	2130	Rose Shirt		128	0	No	0	128	24/01/2020
	Item	Sales Order	SW008	21300101	Rose Shirt	White,XS	2	0	No	0	2	24/01/2020
	Item	Sales Order	SW008	21300102	Rose Shirt	White,S	4	0	No	0	4	24/01/2020
	Item	Sales Order	SW008	21300103	Rose Shirt	White,M	6	0	No	0	6	24/01/2020
	Item	Sales Order	SW008	21300104	Rose Shirt	White,L	8	0	No	0	8	24/01/2020

From the Warehouse Shipment a Warehouse Pick needs to be created, which needs to be registered. That procedure is all according to standard BC and is as such described in the previous paragraph [Creating Warehouse Shipment from Sales Order](#).

USING FILTERS TO CREATE WAREHOUSE DOCUMENTS

In the paragraphs above has been described how to create Warehouse Receipts and Warehouse Shipments from Purchase- and Sales Orders: **Pushing** method.

However, in standard BC also a **Pulling** method is possible that enables you to get the Order Lines in with the Warehouse document as the basis. Two functions can be used:

- **Get Source Documents**
- **Use Filters to get Source Documents**

On the **Warehouse Shipment** and **-Receipt** you can find the following function: **Actions, Functions, Get Source Documents**. We are not getting into detail about how to get Source Documents, because this feature is exactly according to standard BC. This is also true for the procedure of **Use Filters to get Src. Docs.**, but TRIMIT has added to the **Source Document Filter Card** the possibility to filter on the **Master No.** So, we will have a look at that more closely. To get there, on the Warehouse Shipment or Receipt click: **Actions, Functions, Use Filters to Get Src. Docs....**

Let us have a look at a **Source Document Filter Card** by selecting a filter and click **Modify**. Now you can see the options for filtering including **Master No.**

Edit - Filters to Get Source Docs. - Outbound

General

Show Filter Request ····· ☐
Do Not Fill Qty. to Han... · ☐

Manage
Run
Modify
Open in Excel
More options

Code ↑	Description
→ CUSTOMERS	All customers
DHL_FILTER	Filters for Shipping agent DHL
OWNLOG	Trans. Ord. with Own Logistics

Edit - Source Document Filter Card - Outbound - Outbound · CUSTOMERS

Manage
Run
Page
More options

General

Code CUSTOMERS

Description All customers

Source No. Filter

Item No. Filter

Master No. Filter

Variant Code Filter

Unit of Measure Filter ...

Shipment Method Co...

Show Filter Request

Sales Return Orders

Shipping Agent Code ...

Shipping Agent Servic...

Do Not Fill Qty. to Ha...

Source Document:

Sales Orders

Service Orders

Purchase Return Orders ..

Outbound Transfers

Shipping Advice Filter:

Partial

Close

NOTE

As a filter possibility you see also the **Variant Code Filter**. This concerns the standard BC Variant Code and has nothing to do with the TRIMIT VarDim Type Values (also referred to as Variants). It does not make any sense to use this filter!

ADVANCED WAREHOUSING SETUP

Since TRIMIT 2013R2S it is possible to work with BC **WMS** integrated with TRIMIT. WMS stands for 'Warehouse Management Systems' and is the most advanced way of warehousing in standard BC. With WMS you can divide a warehouse **Location** into **Zones**. Each zone has one or more **Bins**; each with specific characteristics. WMS allows you to have a **Directed Pick and Put-away**. This means that the system tells you in which Zone/Bin you should put-away an Item and from which Bin you should pick it. It allows you to manage internal **Movements** of Items for instance, if you want to replenish Pick Bins from Bulk Bins.

The whole advanced warehousing process works according to standard BC. TRIMIT has integrated with it, but there are a couple of Do's and Don'ts. These will be described via scenarios in the chapters further down in this document. In this chapter we are discussing the Setup in the demo site, which are used for these scenarios.

Because WMS is standard BC functionality, some of its features are NOT discussed in this document. These are:

1. Bin Creation, Bin Content Creation Worksheets setting up Bin Types,
2. Bin Rankings (Prioritizing Bins on behalf of warehouse activities)
3. Put-away Templates
4. Cross-Docking
5. Stock Adjustments
6. Cycle Counting
7. Put-away worksheet

For working with these features is referred to standard BC feature documentation.

For scenarios describing the TRIMIT integration with BC warehousing TRIMIT has created two new Location Codes: *BLACK* (for Fashion products) and *GREY* (for Furniture products).

In this chapter the Setup is discussed for:

- **Locations** *BLACK* and *GREY*
- **Zones** and **Bins** on Location *BLACK* and *GREY*
- Working with **Warehouse Class Code**
- Setup **Masters**

SETUP LOCATIONS FOR DIRECTED PICK AND PUT-AWAY

In this paragraph the setup of Locations *BLACK* and *GREY* is described.

Location Code *BLACK* can be used for Fashion companies with a big warehouse that wants to use **Directed Put-away and Pick**. Directed Put-away and Pick means that the system determines to which **Bins** the products need to be stacked and from which they need to be picked. The latter is the case if the same Item can be picked from multiple Bins. This setup is also valid for **Location Code** *GREY* or any other Location that has Directed Put-away and Pick.

Location Card | Work Date: 06/09/2020

+

BLACK · Black Warehouse (WMS)

Zones
Bins
Inventory Posting Setup
Warehouse Employees
Online Map
Dimensions
More options

Address & Contact >

Warehouse

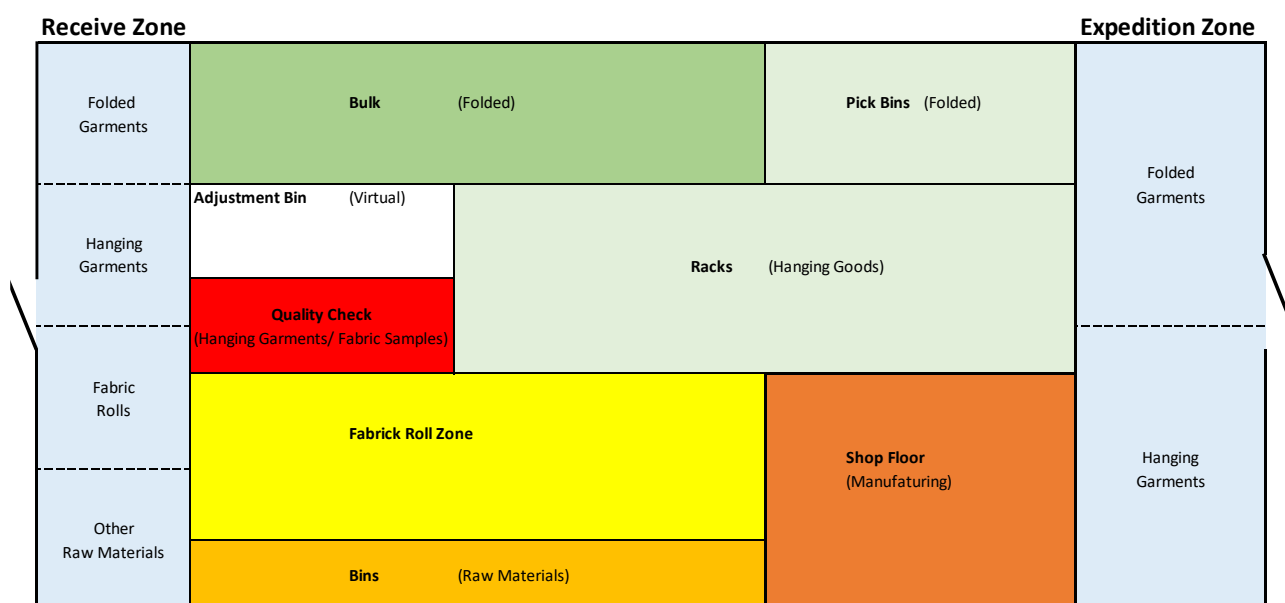
Require Receive
Require Shipment
Require Put-away
Use Put-away Worksheet
Require Pick
Bin Mandatory
Directed Put-away and Pick

Default Bin Selection
Outbound Whse. Handling Time
Inbound Whse. Handling Time
Base Calendar Code
Customised Calendar
Use Cross-Docking
Cross-Dock Due Date Calc.

It could be very well the case that some goods need to be stacked in the Warehouse in Bins, while others are hanging on racks or placed on pallets. That means that the system needs to direct incoming Items to the Bins with the correct characteristics. This could also be the case for Raw Materials. Where Fabrics come in in big rolls that need to be hanged in specific racks for Fabrics, while the other Raw Materials just get to be stocked in Bins or on pallets.

SETUP LOCATION BLACK (IN DETAIL)

Warehouse *BLACK* belongs to a company that purchase both hanging and folded Garments. They also manufacture in-house hanging Garments for which they receive Fabric rolls and other Raw Materials (Trimmings). Both purchased hanging Garments and Fabric rolls have a quality check. The folded Garments need to be put-away in Bulk **Zone** and picked from pick **Bins**.



Schematic Picture of Warehouse BLACK.

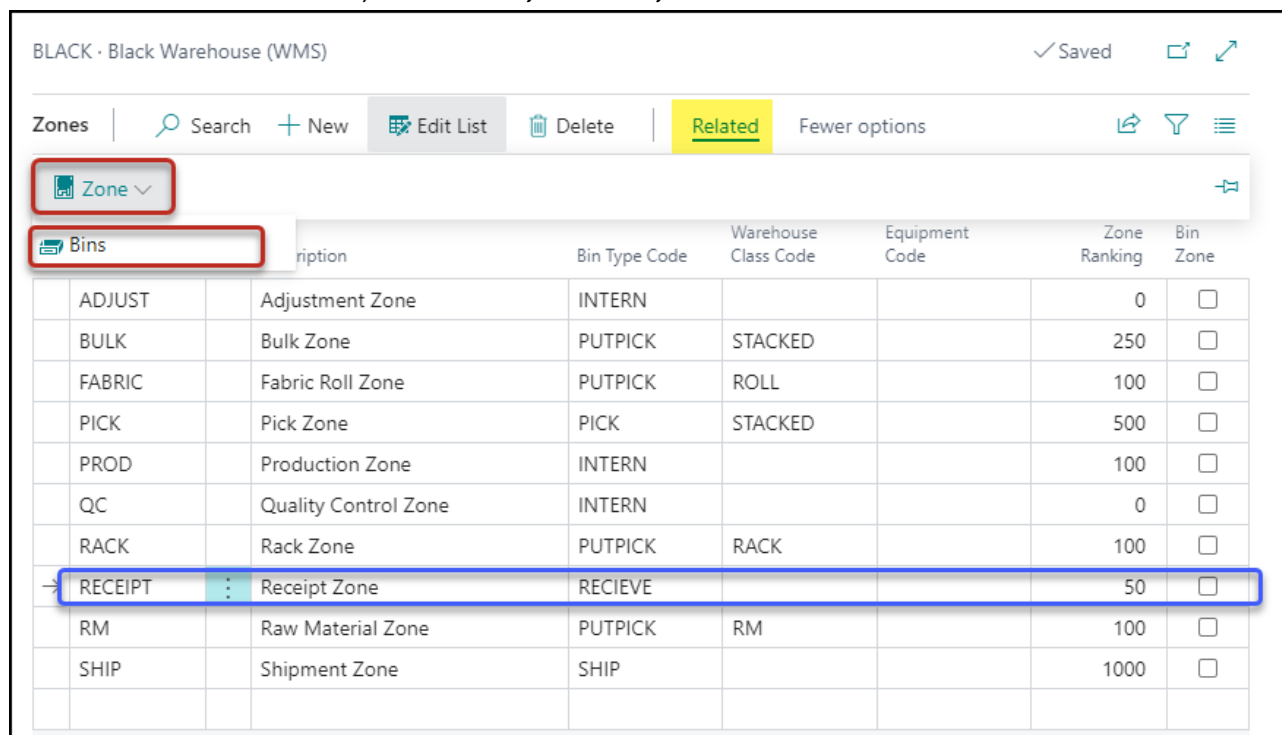
In the picture above we see a schematic view of warehouse **BLACK** for which several Zones are defined. This warehouse will be used for several scenarios described in the next chapter and further down in this document.

When finished Garments or Raw Materials are received, they arrive in the **Receive Zone**. Then they need to be directed to the appropriate Zones and Bins. To do so an Item has a **Warehouse Class Code**.

The system will direct the received Items to Bins with an identical Warehouse Class Code.

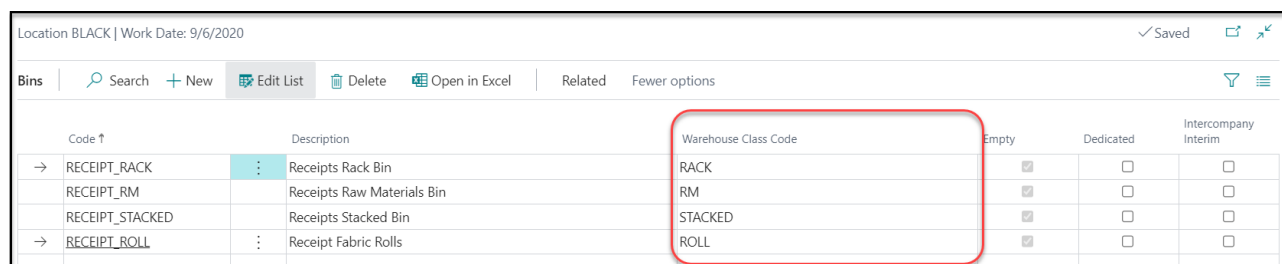
Warehouse Class Code is setup in a Zone. All the Bins belonging to that Zone get by default the same Warehouse Class Code when they are created.

In the Location Card of **BLACK**, click **Related, Locations, Zones** to see the Zones for this Location Code.



Code	Description	Bin Type Code	Warehouse Class Code	Equipment Code	Zone Ranking	Bin Zone
ADJUST	Adjustment Zone	INTERN			0	☐
BULK	Bulk Zone	PUTPICK	STACKED		250	☐
FABRIC	Fabric Roll Zone	PUTPICK	ROLL		100	☐
PICK	Pick Zone	PICK	STACKED		500	☐
PROD	Production Zone	INTERN			100	☐
QC	Quality Control Zone	INTERN			0	☐
RACK	Rack Zone	PUTPICK	RACK		100	☐
→ RECEIPT	Receipt Zone	RECIEVE			50	☐
RM	Raw Material Zone	PUTPICK	RM		100	☐
SHIP	Shipment Zone	SHIP			1000	☐

On an individual **Bin** a different **Warehouse Class Code** could be setup deviating from the Warehouse Class Code of the **Zone**. That is needed for the **RECEIPT** Zone and the **SHIP** Zone (=Expedition Zone). As you can see above these have no Warehouse Class Code. Let us have a look at the Bins belonging to **RECEIPT** Zone by clicking **Relation, Zone, Bins**.



Code	Description	Warehouse Class Code	Empty	Dedicated	Intercompany Interim
→ RECEIPT_RACK	Receipts Rack Bin	RACK	☒	☐	☐
RECEIPT_RM	Receipts Raw Materials Bin	RM	☒	☐	☐
RECEIPT_STACKED	Receipts Stacked Bin	STACKED	☒	☐	☐
→ RECEIPT_ROLL	Receipt Fabric Rolls	ROLL	☒	☐	☐

As you can see, the **RECEIPT** Zone has four Bins. Each **Bin** represent a **Warehouse Class Code** corresponding to the different Items that are arriving. You may have to personalize the Page to make Warehouse Class

Code visible. From these Receipt Bins the various products can be redirected to Zones/Bins with identical Warehouse Class Codes. These procedures are described further down in this document.

From **Location BLACK** not only Hanging and Folded Finished Products are shipped but also Rolls and Raw Materials can be shipped (i.e., to a Manufacturer). Below you can see the corresponding **Bins** in the Expedition Zone (**Zone SHIP**).

Location BLACK | Work Date: 9/6/2020

✓ Saved





Bins



Search



New



Edit List



Delete

More options







Code ↑	Description	Warehouse Class Code	Empty	Dedicated	Intercompany Interim
→ SHIP_RACK	 Shipments Rack Bin	RACK	☒	☐	☐
SHIP_RM	Shipments Raw Materials Bin	RM	☒	☐	☐
SHIP_ROLL	Shipments Fabric Rolls Bin	ROLL	☒	☐	☐
SHIP_STACKED	Shipments Stacked Bin	STACKED	☒	☐	☐

We have determined above that Quality Checks have to be made on incoming Fabrics, Hanging Goods, Folded Goods and Materials. Therefore, the **Zone QC** also needs at least four Bins with different **Warehouse Class Codes** as shown below.

Location BLACK | Work Date: 9/6/2020

✓ Saved





Bins

 Search

 New

 Edit List

 Delete

More options





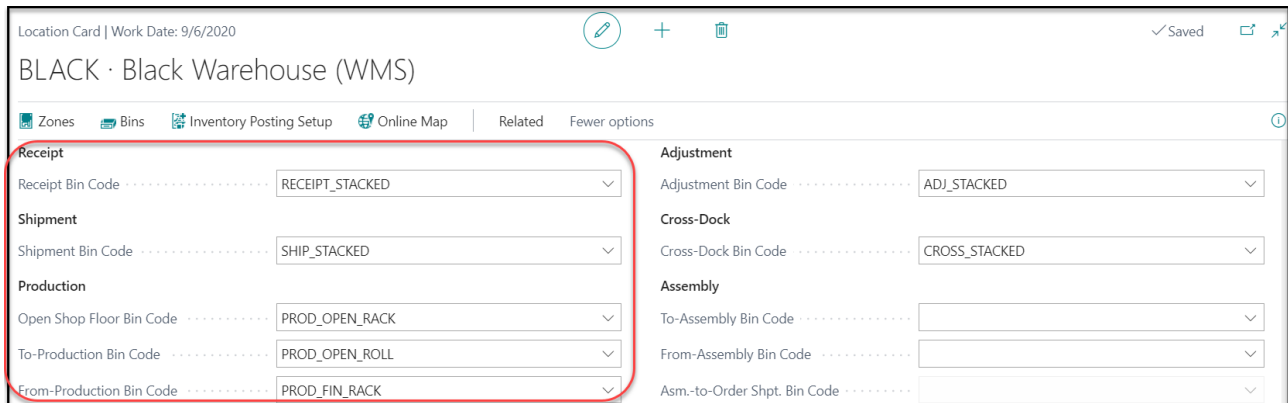


Code ↑	Description	Warehouse Class Code	Empty	Dedicated	Intercompany Interim
→ QC_RACK	Quality Control Rack Bin	RACK	☒	☐	☐
QC_RM	Quality Control Raw Materials Bin	RM	☒	☐	☐
QC_ROLL	Quality Control Fabric Rolls Bin	ROLL	☒	☐	☐
QC_STACKED	Quality Control Stacked Bin	STACKED	☒	☐	☐

This is also the case for the (virtual) **ADJUSTMENT Bin**. This Bin is required for negative or positive Stock Adjustments. Also, for this **Zone**, four different Bins have been setup; each for every appropriate **Warehouse Class Code** (comparable to the Zone **RECEIPT**). This procedure is completely according to standard BC and not specific for the Fashion of Furniture industry. Therefore, in this document we will not go into detail. This is not only the case for **Location BLACK**, but also for **Location GREY**. Cross-docking is also a standard feature that is not discussed in this document and therefore not setup on **Location BLACK** and **GREY** for different Warehouse Classes.

Also, the Production **Location** has a need for **Bins** with **Warehouse Class Codes**. These are discussed further below in this paragraph, but first we need to go into the Bins Setup on Location *BLACK*. This is shown in the screenshot below. Notice that these Bins have a default preference for Items with **Warehouse Class Code** *STACKED* concerning the **Receipt** and **Shipment**.

For the production Bins we use other **Warehouse Class Codes**.



Location Card | Work Date: 9/6/2020

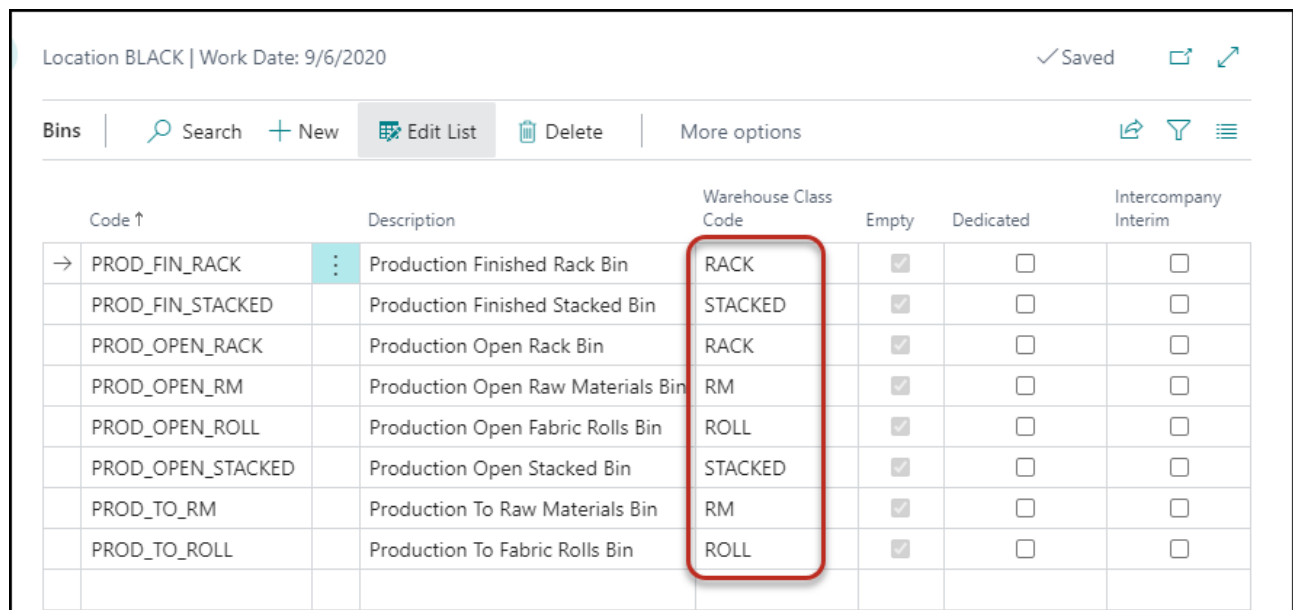
BLACK · Black Warehouse (WMS)

Zones Bins Inventory Posting Setup Online Map Related Fewer options

Receipt
 Receipt Bin Code RECEIPT_STACKED
Shipment
 Shipment Bin Code SHIP_STACKED
Production
 Open Shop Floor Bin Code PROD_OPEN_RACK
 To-Production Bin Code PROD_OPEN_ROLL
 From-Production Bin Code PROD_FIN_RACK

Adjustment
 Adjustment Bin Code ADJ_STACKED
Cross-Dock
 Cross-Dock Bin Code CROSS_STACKED
Assembly
 To-Assembly Bin Code
 From-Assembly Bin Code
 Asm.-to-Order Shpt. Bin Code

Let us have a look into detail of the **Bins** in the **Zone PROD (Production Zone)**. In the screenshot below you can see that also for this Zone Bins are required with different **Warehouse Class Codes**.



Location BLACK | Work Date: 9/6/2020

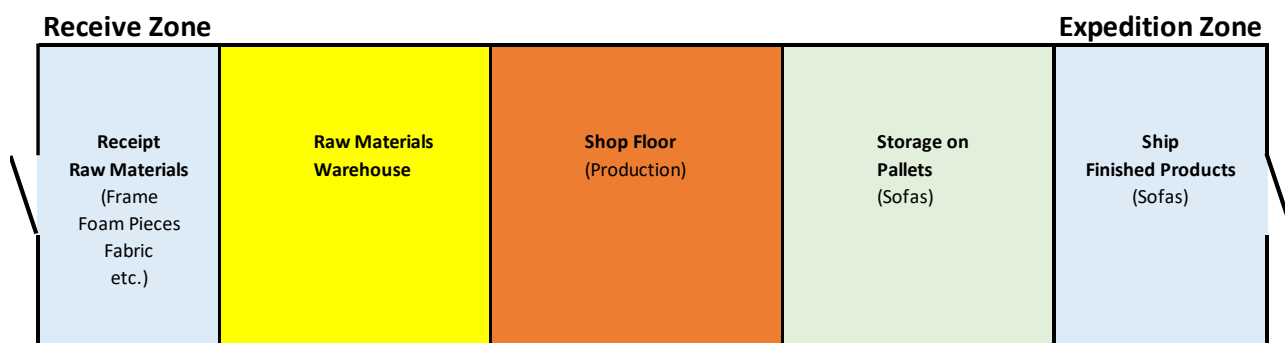
Bins Search + New Edit List Delete More options

Code ↑	Description	Warehouse Class Code	Empty	Dedicated	Intercompany Interim
→ PROD_FIN_RACK	Production Finished Rack Bin	RACK	☒	☐	☐
PROD_FIN_STACKED	Production Finished Stacked Bin	STACKED	☒	☐	☐
PROD_OPEN_RACK	Production Open Rack Bin	RACK	☒	☐	☐
PROD_OPEN_RM	Production Open Raw Materials Bin	RM	☒	☐	☐
PROD_OPEN_ROLL	Production Open Fabric Rolls Bin	ROLL	☒	☐	☐
PROD_OPEN_STACKED	Production Open Stacked Bin	STACKED	☒	☐	☐
PROD_TO_RM	Production To Raw Materials Bin	RM	☒	☐	☐
PROD_TO_ROLL	Production To Fabric Rolls Bin	ROLL	☒	☐	☐

SETUP LOCATION GREY (IN DETAIL)

In this paragraph **Location GREY** is discussed in detail. This Location belongs to a company that sells customer specific Sofas and assemble these Sofas from a basic frame, foam parts including the upholstery. Every single Sofa will be stored on a pallet before it is shipped. The Setup of this Location is easier than Location *BLACK*, because only manufacturing is involved. Because in the scenarios related to Location *BLACK*, the working with **Warehouse Class Codes** is discussed, we have not defined Warehouse Class Codes on Zones and Bins on Location *GREY*.

In the picture below we see a schematic view of warehouse *GREY* for which several Zones are defined. This warehouse will be used for several scenarios described further down in this document.



Schematic view of Location GREY.

Because we do not work with Warehouse Class Codes, only one **Bin** is required in the **Zone RECEIPT**. That is also the case for the **Zone SHIP**. The production zone requires three Bins. These Bins are shown in screenshot of a detail from the **Location Card**.

Bins	
Receipt	
Receipt Bin Code	RECEIPT_RM
Shipment	
Shipment Bin Code	SHIP_FP
Production	
Open Shop Floor Bin Code	PROD_SHOP
To-Production Bin Code	PROD_RM
From-Production Bin Code	PROD_FIN

For the Raw Materials (**Zone RM**) we have defined a 3-dimensional storage Bins (Aisle/Section/Shelf).

In the screenshot below a detailed list of the Bins in this Zone is shown.

We can also see below the list of Bins for the Finished Products storage Zone (**Zone FINISHED**), where the Sofas are stored on pallets.

Bins		Bins	
Search	New	Search	New
Edit List	Delete	Edit List	Delete
Open in Excel	Related	Open in Excel	Related
Fewer options		Fewer options	
Code ↑	Description	Code ↑	Description
X1-Y8-Z4	RM Bin Aisle X1 Section Y8 Shelf Z4	PAL0001	Pallet 0001
X1-Y8-Z5	RM Bin Aisle X1 Section Y8 Shelf Z5	PAL0002	Pallet 0002
X1-Y9-Z1	RM Bin Aisle X1 Section Y9 Shelf Z1	PAL0003	Pallet 0003
X1-Y9-Z2	RM Bin Aisle X1 Section Y9 Shelf Z2	PAL0004	Pallet 0004
X1-Y9-Z3	RM Bin Aisle X1 Section Y9 Shelf Z3	PAL0005	Pallet 0005
X1-Y9-Z4	RM Bin Aisle X1 Section Y9 Shelf Z4	PAL0006	Pallet 0006
X1-Y9-Z5	RM Bin Aisle X1 Section Y9 Shelf Z5	PAL0007	Pallet 0007
X2-Y1-Z1	RM Bin Aisle X2 Section Y1 Shelf Z1	PAL0008	Pallet 0008
X2-Y1-Z2	RM Bin Aisle X2 Section Y1 Shelf Z2	PAL0009	Pallet 0009
X2-Y1-Z3	RM Bin Aisle X2 Section Y1 Shelf Z3	PAL0010	Pallet 0010
X2-Y1-Z4	RM Bin Aisle X2 Section Y1 Shelf Z4		
X2-Y1-Z5	RM Bin Aisle X2 Section Y1 Shelf Z5		

SETUP MASTERS FOR WMS

Mentioned above is that an incoming Item needs to have an appropriate Warehouse Class Code – especially on **Location BLACK**. For the scenarios in this document, we have dedicated several Masters for **Location BLACK**. In the table below you can see those Masters based on their Warehouse Class Code.

Warehouse Class Code	Description	Master No.
Stack	Folded Garments	2330
Rack	Hanging Garments	2200
Roll	Fabric Rolls	M2000, M2030
RM	Trimmings & Other Raw Materials	M2100, M2300

The **Warehouse Class Code** can be entered on the **Master Card** in the FastTab **Warehouse**. An example (of Master 2330) is shown below. The value of this field is inherited to the Items created from that Master. We do not want to use Cross-Docking, so that checkmark is set off.

Warehouse

Show less

Warehouse Class Code

STACKED

Phys Invt Counting Period Code

Special Equipment Code

Use Cross-Docking

Put-away Template Code

Exclude from Warehouse Transaction...

Put-away Unit of Measure Code

Require Pick for Production

We also need **Masters** in scenarios on **Location GREY**. These include the Masters 5200 (Sofa Persephone) and all sub-assemblies and Raw Materials used for this sofa. On **Location GREY** we do not work with different **Warehouse Class Codes**. Therefore, Items of these Masters can be used for any kind of Warehousing except on **Location BLACK**.

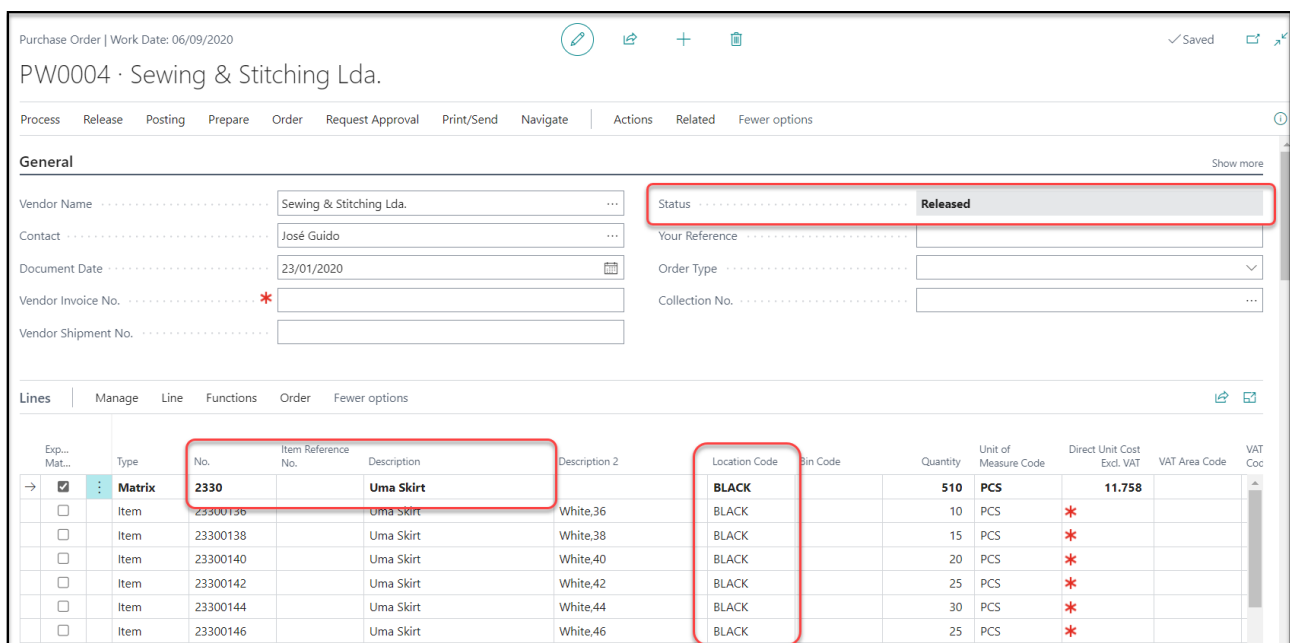
TRIMIT AND BC ADVANCED WAREHOUSING

In this and following chapters several scenarios are discussed concerning WMS in TRIMIT. The following topics are included in this discussion:

- Receive and Directed Put-away
- Directed Pick and Shipment
- Bin Replenishment
- Production Pick and Put-away
- Miscellaneous WMS Processes

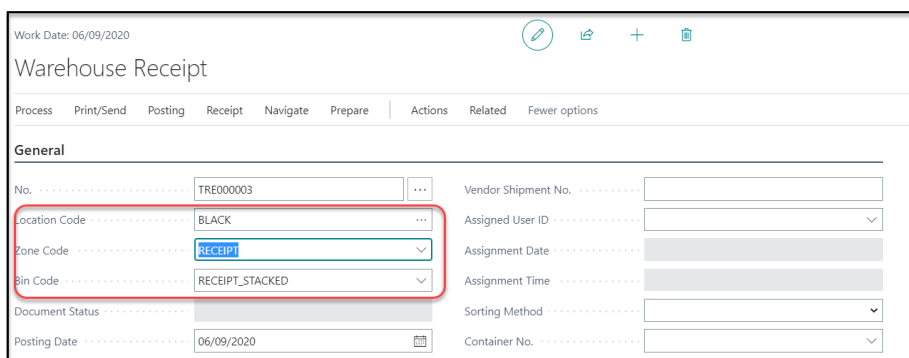
RECEIVE AND DIRECTED PUT-AWAY

For this scenario, we use Master *2230 Uma Skirt*. The Demo Company has already an example of a *released Purchase Order PW0004* on the **Location Code BLACK** (see below).



Exp... Mat...	Type	No.	Item Reference No.	Description	Description 2	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. VAT	VAT Area Code	VAT Coc
→	Matrix	2330		Uma Skirt		BLACK		510	PCS	11.758		
	Item	23300136		Uma Skirt	White,36	BLACK		10	PCS	*		
	Item	23300138		Uma Skirt	White,38	BLACK		15	PCS	*		
	Item	23300140		Uma Skirt	White,40	BLACK		20	PCS	*		
	Item	23300142		Uma Skirt	White,42	BLACK		25	PCS	*		
	Item	23300144		Uma Skirt	White,44	BLACK		30	PCS	*		
	Item	23300146		Uma Skirt	White,46	BLACK		25	PCS	*		

To receive this Purchase Order, we go to the **Warehouse Receipts**. We create a new one on **Location Code BLACK**. You will see that the **Receipt Zone** will be populated and the **Receipt Bin** that has **Warehouse Class Code STACKED**. This means that only Items with the same Warehouse Class Code can be received with this document.

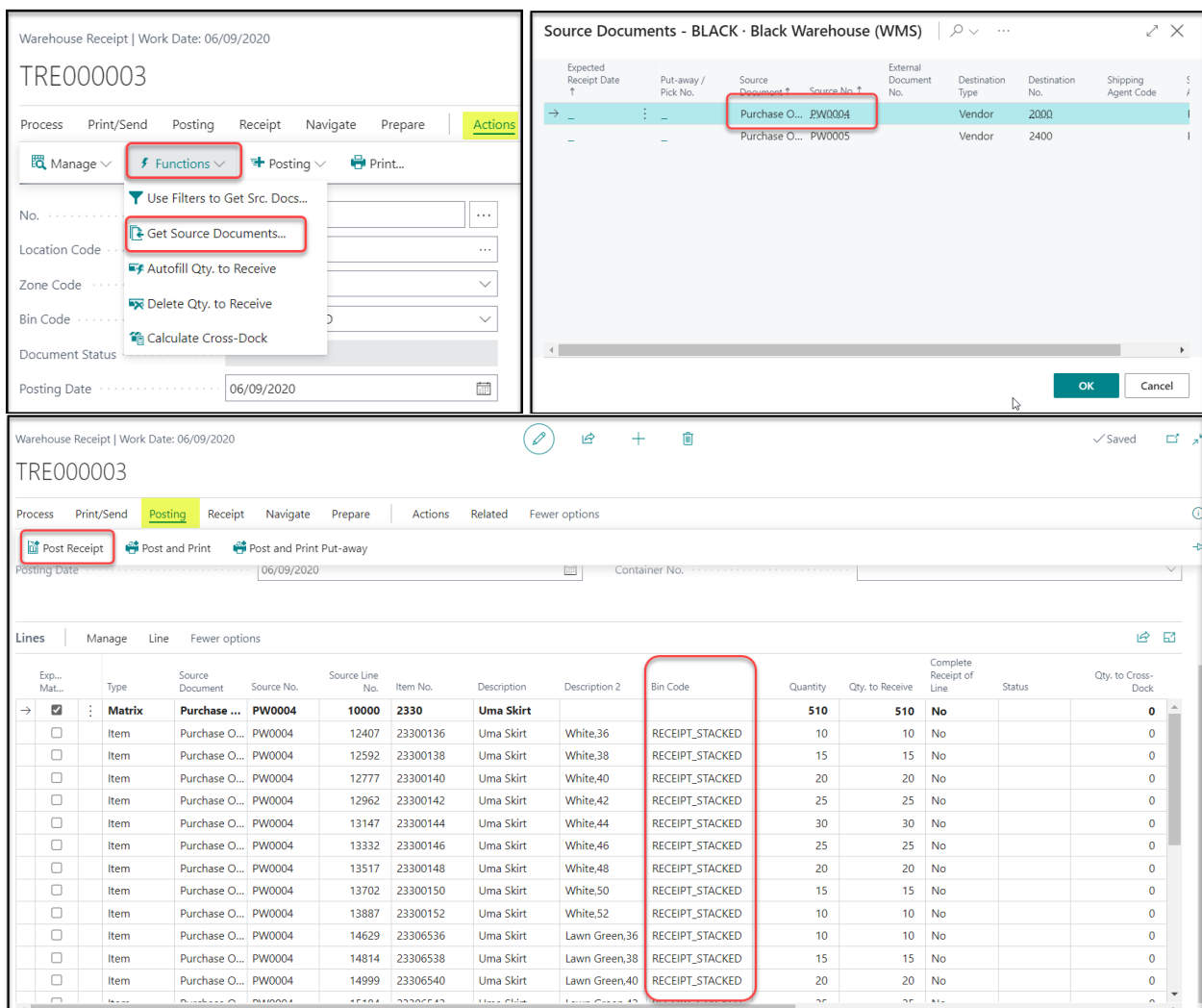


No.	Location Code	Zone Code	Bin Code	Document Status	Posting Date	Vendor Shipment No.	Assigned User ID	Assignment Date	Assignment Time	Sorting Method	Container No.
TRE000003	BLACK	RECEIPT	RECEIPT_STACKED		06/09/2020						

NOTE

In standard BC, you can only setup one default **Receipt Bin** per Location. This means that if the goods to receive have another **Warehouse Class Code**, then this default Bin, you will have to change the **Zone** and/or the **Bin** on the **Receipt Header** manually before you get the Source Documents or else you need to add the appropriate Zones and Bins on the individual Receipt Lines. This is explained in the next paragraph

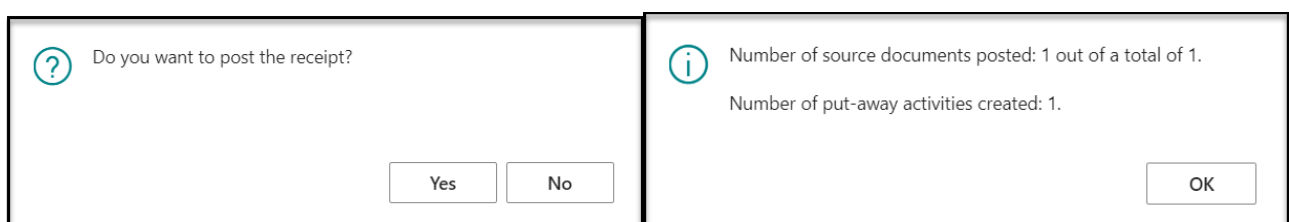
In this scenario we use the Function **Get Source Documents** to select which Purchase Orders we want to receive. Click **Actions, Functions, Get Source Documents....** In this case we select **Purchase Order PW0004** and click **OK**. The **Receipt Lines** will be populated including the **Matrix Line**. Notice that the **Bin Code** has the value **RECEIPT_STACK**.



The screenshot shows the 'Warehouse Receipt' window for 'TRE000003' with a work date of 06/09/2020. The 'Actions' menu is open, and 'Get Source Documents...' is selected. The 'Source Documents' window shows a list of purchase orders, with 'Purchase O... PW0004' selected. The 'Post Receipt' button is highlighted in the 'Posting' tab. The 'Lines' table below shows the receipt lines, including a 'Matrix' line and several 'Item' lines, all with a 'Bin Code' of 'RECEIPT_STACK'.

Exp... Mat...	Type	Source Document	Source No.	Source Line No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Receive	Complete Receipt of Line	Status	Qty. to Cross-Dock
→	Matrix	Purchase ...	PW0004	10000	2330	Uma Skirt		RECEIPT_STACK	510	510	No		0
	Item	Purchase O...	PW0004	12407	23300136	Uma Skirt	White,36	RECEIPT_STACK	10	10	No		0
	Item	Purchase O...	PW0004	12592	23300138	Uma Skirt	White,38	RECEIPT_STACK	15	15	No		0
	Item	Purchase O...	PW0004	12777	23300140	Uma Skirt	White,40	RECEIPT_STACK	20	20	No		0
	Item	Purchase O...	PW0004	12962	23300142	Uma Skirt	White,42	RECEIPT_STACK	25	25	No		0
	Item	Purchase O...	PW0004	13147	23300144	Uma Skirt	White,44	RECEIPT_STACK	30	30	No		0
	Item	Purchase O...	PW0004	13332	23300146	Uma Skirt	White,46	RECEIPT_STACK	25	25	No		0
	Item	Purchase O...	PW0004	13517	23300148	Uma Skirt	White,48	RECEIPT_STACK	20	20	No		0
	Item	Purchase O...	PW0004	13702	23300150	Uma Skirt	White,50	RECEIPT_STACK	15	15	No		0
	Item	Purchase O...	PW0004	13887	23300152	Uma Skirt	White,52	RECEIPT_STACK	10	10	No		0
	Item	Purchase O...	PW0004	14629	23306536	Uma Skirt	Lawn Green,36	RECEIPT_STACK	10	10	No		0
	Item	Purchase O...	PW0004	14814	23306538	Uma Skirt	Lawn Green,38	RECEIPT_STACK	15	15	No		0
	Item	Purchase O...	PW0004	14999	23306540	Uma Skirt	Lawn Green,40	RECEIPT_STACK	20	20	No		0

The next step is, we post this **Receipt** by clicking **Posting, Post Receipt**. Click **Yes** and **OK** to confirm. The Receipt has been posted and disappeared, while a **Put-away** has been created.



The screenshot shows a confirmation dialog with two panels. The left panel asks 'Do you want to post the receipt?' with 'Yes' and 'No' buttons. The right panel shows information: 'Number of source documents posted: 1 out of a total of 1.' and 'Number of put-away activities created: 1.' with an 'OK' button.

Let us go to the **Warehouse Put-aways** List and open the one we just created: *TPU00002*. Now you can see that for each Receipt Line two lines are created in the Put-away: a *Take* and a *Place* (see **Action Type**). The *Take* Actions means that you take the Items from a specific Bin. Then you walk through the warehouse and Place the Items in the Bin that is mentioned in the Line with the *Place* Action. You can post every individual Line here. That is very time consuming, and it is to be advised that this is handled by scanning devices. Note that the system has **directed** every single **variant** to its unique **Bulk Bin**.

Warehouse Put-aways | Work Date: 06/09/2020

Search Manage More options

No. ↑	Source Document	Source No.	Location Code	Destination Type	Destination No.	External Document No.	No. of Lines
PU000001	:		GREEN				2
TPU000002			BLACK				54

Warehouse Put-away | Work Date: 06/09/2020

Put-away · TPU000002

Register Put-away Print... Registered Put-aways More options

General

No. TPU000002 Assignment Date

Location Code BLACK Assignment Time

Breakbulk Filter Sorting Method

Assigned User ID

Lines Manage More options

Action Type	Source Document	Source No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Qty. Outstanding	Due Date	U
Take	Purchase O...	PW0004	23300136	Uma Skirt	White,36	RECEIPT_STA...	10	10	0	10	07/11/2020	
Place	Purchase O...	PW0004	23300136	Uma Skirt	White,36	BULK099	10	10	0	10	07/11/2020	
Take	Purchase O...	PW0004	23300138	Uma Skirt	White,38	RECEIPT_STA...	15	15	0	15	07/11/2020	
Place	Purchase O...	PW0004	23300138	Uma Skirt	White,38	BULK098	15	15	0	15	07/11/2020	
Take	Purchase O...	PW0004	23300140	Uma Skirt	White,40	RECEIPT_STA...	20	20	0	20	07/11/2020	
Place	Purchase O...	PW0004	23300140	Uma Skirt	White,40	BULK097	20	20	0	20	07/11/2020	
Take	Purchase O...	PW0004	23300142	Uma Skirt	White,42	RECEIPT_STA...	25	25	0	25	07/11/2020	
Place	Purchase O...	PW0004	23300142	Uma Skirt	White,42	BULK096	25	25	0	25	07/11/2020	
Take	Purchase O...	PW0004	23300144	Uma Skirt	White,44	RECEIPT_STA...	30	30	0	30	07/11/2020	

We will register the whole Put-away by clicking on **Register Put-away**. According to the system now all Items are stored on the appropriate Bins. The Put-away has disappeared.

RECEIVE AND DIRECTED PUT-AWAY DIFFERENT WAREHOUSE CLASS

Finished Products and Raw Materials can be stored in a different way. For instance, Garments can be hanging on racks or stacked on shelves folded. In this scenario we receive Fabrics Rolls that need to be stored on specific Racks. However, Trimmings (Buttons, Zippers, etc.) we are receiving are stored in boxes on shelves.

If you look at the schematic picture of Location *BLACK*, you can see that both types of Raw Materials are kept in the warehouse in different **Zones**. Each zone has its own **Warehouse Class Code** corresponding to the one on the different **Master Cards**.

In this scenario the Fabric Rolls and the Trimmings come from the same supplier. For this **Released Purchase Order PW0005** (Chihuahua Textiles) has been created. Materials can come also in different Variants. Some of them are setup as **Matrix** Items, for instance **Master M2300** (Zipper).

Purchase Order | Work Date: 06/09/2020

PW0005 · Chihuahua Textiles

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

General

Vendor Name Chihuahua Textiles

Contact Antonia Banderas

Document Date 23/01/2020

Vendor Invoice No. *

Vendor Shipment No.

Status Released

Your Reference

Order Type ▾

Collection No.

Lines | Manage Line Functions Order Fewer options

Exp... Mat...	Type	No.	Item Reference No.	Description	Description 2	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. VAT	VAT A
☐	Item	M200099		Fabric 72 % Polyamide, 28 % Elastane	Black	BLACK		500	M	4.927	
☐	Item	M203001		Jaguar Print 72 % Polyamide, 28 % Elastane	White	BLACK		500	M	5.922	
☐	Item	M203030		Jaguar Print 72 % Polyamide, 28 % Elastane	Yellow	BLACK		500	M	5.922	
☐	Item	M210020		Thread 100% Cotton	Black	BLACK		10	SPOOL	19.805	
→ ☐	Matrix	M2300		Zipper 10 - 100 cm		BLACK		900	PCS	0.182	

As described in the previous chapter we create a **Warehouse Receipt** on **Location Code BLACK**. But this time we must change the **Bin Code** from **RECEIPT_STACK** into **RECEIPT_ROLL**.

Work Date: 06/09/2020

Warehouse Receipt

Process Print/Send Posting Receipt Navigate Prepare Actions Related Fewer options

General

No. TRE000004

Location Code BLACK

Zone Code RECEIPT

Bin Code RECEIPT_ROLL

Document Status

Posting Date 06/09/2020

We follow the same procedure as in the previous paragraph [Receive and Directed Put-away](#) by clicking **Actions, Functions, Get Source Documents...** from which we select the appropriate **Source Document PW0005** according to the procedure described in the previous paragraph. However, this time we get the following warning:



One or more of the lines on this Warehouse Receipt Header require special warehouse handling. The Bin Code for such lines has been set to blank.

OK

The reason is that only the Fabrics have the same Warehouse Class Codes as setup in the Receipt Header. The Zippers and the Thread Cones have not. That is why the **Bin Code** for these Lines have been set to blank.

Lines	Manage	Line	Fewer options	Exp... Mat...	Type	Source Document	Source No.	Source Line No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Receive	Complete Receipt of Line	Status	Qty. to Cross-Dock
→	☐	☐	☐	☐	Item	Purchase O...	PW0005	10000	M200099	Fabric 72 % P...	Black	RECEIPT_ROLL	500	500	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	20000	M203001	Jaguar Print 7...	White	RECEIPT_ROLL	500	500	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	30000	M203030	Jaguar Print 7...	Yellow	RECEIPT_ROLL	500	500	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	40000	M210020	Thread 100% ...	Black		10	10	No		0
	☒	☐	☐	☐	Matrix	Purchase ...	PW0005	50000	M2300	Zipper 10 - 1...			900	900	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	51459	M230020012	Zipper 10 - 10...	Black,12 cm		300	300	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	51476	M230020014	Zipper 10 - 10...	Black,14 cm		300	300	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	51595	M230020060	Zipper 10 - 10...	Black,60 cm		100	100	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	51612	M230020070	Zipper 10 - 10...	Black,70 cm		100	100	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	51629	M230020080	Zipper 10 - 10...	Black,80 cm		100	100	No		0

NOTE

Because the **Matrix Line** is not a real Item to Receive, the **Zone** and **Bin** fields on those Lines will always be *empty*.

These Bin Codes need to be entered manually with **Bin Code** *RECEIPT_RM*. You can do that on the **Matrix Line** for a quick entry. The result is shown below. The other option is to remove these lines and create a new Receipt, but this time on **Bin Code** *RECEIPT_RM*. Next step is to post the **Warehouse Receipt** and a **Warehouse Put-away** is created. This process is in more detail described in the previous paragraph [Receive and Directed Put-away](#).

Lines	Manage	Line	Fewer options	Exp... Mat...	Type	Source Document	Source No.	Source Line No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Receive	Complete Receipt of Line	Status	Qty. to Cross-Dock
	☐	☐	☐	☐	Item	Purchase O...	PW0005	10000	M200099	Fabric 72 % P...	Black	RECEIPT_ROLL	500	500	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	20000	M203001	Jaguar Print 7...	White	RECEIPT_ROLL	500	500	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	30000	M203030	Jaguar Print 7...	Yellow	RECEIPT_ROLL	500	500	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	40000	M210020	Thread 100% ...	Black	RECEIPT_RM	10	10	No		0
	☒	☐	☐	☐	Matrix	Purchase ...	PW0005	50000	M2300	Zipper 10 - 1...			900	900	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	51459	M230020012	Zipper 10 - 10...	Black,12 cm	RECEIPT_RM	300	300	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	51476	M230020014	Zipper 10 - 10...	Black,14 cm	RECEIPT_RM	300	300	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	51595	M230020060	Zipper 10 - 10...	Black,60 cm	RECEIPT_RM	100	100	No		0
→	☐	☐	☐	☐	Item	Purchase O...	PW0005	51612	M230020070	Zipper 10 - 10...	Black,70 cm	RECEIPT_RM	100	100	No		0
	☐	☐	☐	☐	Item	Purchase O...	PW0005	51629	M230020080	Zipper 10 - 10...	Black,80 cm	RECEIPT_RM	100	100	No		0

Warehouse Put-away | Work Date: 06/09/2020

Put-away · TPU000003

Register Put-away | Print... | Registered Put-aways | More options

Breakbulk Filter: ☐ Sorting Method:

Assigned User ID:

Action Type	Source Document	Source No.	Item No.	Description	Description 2	Zone Code	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Outs
Take	Purchase O...	PW0005	M200099	Fabric 72 % Polyamide, 28 % EL...	Black	RECEIPT	RECEIPT_ROLL	500	500	0	
Place	Purchase O...	PW0005	M200099	Fabric 72 % Polyamide, 28 % EL...	Black	FABRIC	RR001	500	500	0	
Take	Purchase O...	PW0005	M203001	Jaguar Print 72 % Polyamide, 2...	White	RECEIPT	RECEIPT_ROLL	500	500	0	
Place	Purchase O...	PW0005	M203001	Jaguar Print 72 % Polyamide, 2...	White	FABRIC	RR002	500	500	0	
Take	Purchase O...	PW0005	M203030	Jaguar Print 72 % Polyamide, 2...	Yellow	RECEIPT	RECEIPT_ROLL	500	500	0	
Place	Purchase O...	PW0005	M203030	Jaguar Print 72 % Polyamide, 2...	Yellow	FABRIC	RR003	500	500	0	
Take	Purchase O...	PW0005	M210020	Thread 100% Cotton	Black	RECEIPT	RECEIPT_RM	10	10	0	
Place	Purchase O...	PW0005	M210020	Thread 100% Cotton	Black	RM	RM001	10	10	0	
Take	Purchase O...	PW0005	M230020012	Zipper 10 - 100 cm	Black 12 cm	RECEIPT	RECEIPT_RM	300	300	0	

In the generated **Warehouse Put-away** you can see that the Fabrics are directed to the **FABRIC Zone** with **Bin Codes** starting with **RR** and the Threads and Zippers the **Zone RM** with **Bin Codes** starting with **RM**. Let us register and the Put-away will disappear. Now all the Items are placed in their Bins according to the system.

BIN REPLENISHMENT

In the previous paragraph [Receive and Directed Put-away](#), we have received some *Uma Skirts* in the warehouse. They are stacked in the **BULK Zones**. However, we prefer to Pick them from the **PICK Zone**. Therefore, we must replenish the Pick **Bins** from the Bulk Bins. This scenario is described below.

In the screenshot below, you can see that we have setup fixed **Bin Codes** in the **Zone PICK** for the Items belonging to **Master 2330 (Uma Skirt)**. The replenishment parameters are set in such a way that, if the **Min. Qty.** comes below 2, then the system will suggest replenishing it until a **Max. Qty.** of 5 for all these Items. As you can see in this situation the Bins are empty (**Quantity (Base)**) – so below 2. So, this should trigger **Warehouse Movements** from the **BULK Zone** to the **PICK Zone**.

Bin Contents | Work Date: 9/6/2020

Options

Location Filter: Zone Filter:

Manage | Open in Excel | Related | Fewer options

Bin Code	Item No.	Unit of Measure Code	Def...	Ded...	Warehouse Class Code	Bin Type Code	Bin Ranking	Block Movement	Min. Qty.	Max. Qty.	Quantity	Quantity (Base)	Pick Quantity (Base)
X1-Y1-Z1	23300136	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0
X1-Y1-Z2	23300138	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0
X1-Y1-Z3	23300140	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0
X1-Y1-Z4	23300142	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0
X1-Y1-Z5	23300144	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0
X1-Y2-Z1	23300146	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0
X1-Y2-Z2	23300148	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0
X1-Y2-Z3	23300150	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0
X1-Y2-Z4	23300152	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0
X1-Y2-Z5	23306536	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0
X1-Y3-Z1	23309938	PCS	☐	☐	STACKED	PICK	500		2	5	0	0	0

Let us have a look at the **Movement Worksheet**. Before we can open this Page, you will have to make sure, that you are setup as a **Warehouse Employee** with a default **Location Code BLACK** as shown below. Then the Movement Worksheet will open on **Location Code BLACK**.

Warehouse Employees | Work Date: 9/6/2020

Search + New Edit List Delete Open in Excel

User ID ↑	Location Code ↑	Default
→ RKL@TRIMIT.COM	BLACK	☒
RKL@TRIMIT.COM	GREEN	☐
RKL@TRIMIT.COM	GREY	☐
RKL@TRIMIT.COM	ORANGE	☐

Movement Worksheets | Work Date: 06/09/2020

Name: DEFAULT

Location Code: BLACK

Sorting Method:

Manage Process Line Item More options

Create Movement... Autofill Qty. to Handle Delete Qty. to Handle Calculate Bin Replenishment... Get Bin Content... Warehouse Entries

Item No.	Description	Description 2	Code	From Bin Code	To Zone Code	To Bin Code	Quantity	Outstanding	Qty. to Handle	Qty. Handled	Due Date	Units of Measure Code
							0	0	0	0		

In the Movement Worksheet we can calculate the Bin Replenishment by clicking **Process, Calculate Bin Replenishment....** In the Request Page you can setup any appropriate Filters if necessary. For now, we don't set any and click **OK**. After this the system will make suggestions of moving Items from the **BULK Bin Codes** to the **PICK Bin Codes**.

Calculate Bin Replenishment

Options

Worksheet Template Name: MOVEMENT

Worksheet Name: DEFAULT

Location Code: BLACK

Allow Breakbulk: ☒

Do Not Fill Qty. to Handle: ☐

Filter: Bin Content

× Bin Code:

× Item No.:

+ Filter...

Schedule... OK Cancel

Note that we have created fixed Bins for any Variant combination of the *Uma Skirt* with a **Reorder Point** of 2 and a **Maximum Qty.** of 5 per Bin. Calculating **Bin Replenishment** will result in the following Worksheet.

Movement Worksheets | Work Date: 06/09/2020

✓ Saved

Name: DEFAULT

Location Code: BLACK

Sorting Method:

Manage Process Line Item More options

Create Movement... Autofill Qty. to Handle Delete Qty. to Handle Calculate Bin Replenishment... Get Bin Content... Warehouse Entries

Item No.	Description	Description 2	Code	From Bin Code	To Zone Code	To Bin Code	Quantity	Qty. Outstanding	Qty. to Handle	Qty. Handled	Due Date	Unit of Measure Code
23300136	Uma Skirt	White,36	BULK	BULK099	PICK	X1-Y1-Z1	5	5	5	0		PCS
23300138	Uma Skirt	White,38	BULK	BULK098	PICK	X1-Y1-Z2	5	5	5	0		PCS
23300140	Uma Skirt	White,40	BULK	BULK097	PICK	X1-Y1-Z3	5	5	5	0		PCS
23300142	Uma Skirt	White,42	BULK	BULK096	PICK	X1-Y1-Z4	5	5	5	0		PCS
23300144	Uma Skirt	White,44	BULK	BULK095	PICK	X1-Y1-Z5	5	5	5	0		PCS
23300146	Uma Skirt	White,46	BULK	BULK094	PICK	X1-Y2-Z1	5	5	5	0		PCS
23300148	Uma Skirt	White,48	BULK	BULK093	PICK	X1-Y2-Z2	5	5	5	0		PCS
23300150	Uma Skirt	White,50	BULK	BULK092	PICK	X1-Y2-Z3	5	5	5	0		PCS
23300152	Uma Skirt	White,52	BULK	BULK091	PICK	X1-Y2-Z4	5	5	5	0		PCS
23306536	Uma Skirt	Lawn Green,36	BULK	BULK090	PICK	X1-Y2-Z5	5	5	5	0		PCS
23306538	Uma Skirt	Lawn Green,38	BULK	BULK089	PICK	X1-Y3-Z1	5	5	5	0		PCS

If you are satisfied with the **Bin Replenishment** proposal in the Worksheet you can create the **Movement**. Click **Process, Create Movement...** and confirm with **OK** twice.

Whse.-Source - Create Document

Options

Assigned User ID:

Sorting Method for Activity Lines:

Set Breakbulk Filter:

Do Not Fill Qty. to Handle:

Print Document:

Advanced >

OK Cancel

Movement activity no. TWM000001 has been created.

OK

Warehouse Movement | Work Date: 06/09/2020

✓ Saved

Movement: TWM000001

Register Movement Print... More options

General

No.: TWM000001

Location Code: BLACK

Breakbulk Filter:

Assigned User ID:

Assignment Date:

Assignment Time:

Sorting Method:

Lines Manage More options

Action Type	Item No.	Description	Description 2	Zone Code	Bin Code	Quantity	Qty. to Handle	Qty. Outstanding	Qty. Outstanding (Base)	Due Date	Unit of Measure Code
Take	23309952	Uma Skirt	Black,52	BULK	BULK073	5	5	5	5		PCS
Place	23309952	Uma Skirt	Black,52	PICK	X1-Y6-Z2	5	5	5	5		PCS
Take	23309950	Uma Skirt	Black,50	BULK	BULK074	5	5	5	5		PCS
Place	23309950	Uma Skirt	Black,50	PICK	X1-Y6-Z1	5	5	5	5		PCS
Take	23309948	Uma Skirt	Black,48	BULK	BULK075	5	5	5	5		PCS
Place	23309948	Uma Skirt	Black,48	PICK	X1-Y5-Z5	5	5	5	5		PCS
Take	23309946	Uma Skirt	Black,46	BULK	BULK076	6	6	6	6		PCS
Place	23309946	Uma Skirt	Black,46	PICK	X1-Y5-Z4	6	6	6	6		PCS
Take	23309944	Uma Skirt	Black,44	BULK	BULK077	5	5	5	5		PCS

In the **Movement Lines** we can see the *Take* Actions from the **Bulk** Bin Codes and the *Place* Actions to the **Pick** Bin Codes. Let's Register the Movement. After confirmation the Movement will disappear, and the Items are all registered on the Pick Bins.

?

Do you want to register the Movement Document?

Yes

No

DIRECTED PICK AND SHIPMENT

In the previous paragraph, we have moved **Master 2330 Uma Skirt** from the Bulk Bins to the Pick Bins. In this paragraph, we will ship some of it to a Customer using the WMS Feature **Directed Pick**. For that reason, we have created a **Sales Order SW003**. Note that this Sales order is on **Location Code BLACK** and that it has been **Released**.

Sales Order | Work Date: 06/09/2020

✓ Saved

✕

SW003 · The Fashion Store UK

Process

Release

Posting

Prepare

Order

Request Approval

Print/Send

Navigate

Actions

Related

Fewer options

General >

23/01/2020

23/01/2020

23/01/2020

Released

Lines

Manage

Line

Order

Fewer options

Exp... Mat...	Type	No.	Item Reference No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	VAT Area Code	VAT Group Code	Link
→	Matrix	2330		Uma Skirt		BLACK	102	PCS	39.00			
☐	Item	23300136		Uma Skirt	White,36	BLACK	2	PCS	39.00			
☐	Item	23300138		Uma Skirt	White,38	BLACK	3	PCS	39.00			
☐	Item	23300140		Uma Skirt	White,40	BLACK	4	PCS	39.00			
☐	Item	23300142		Uma Skirt	White,42	BLACK	5	PCS	39.00			
☐	Item	23300144		Uma Skirt	White,44	BLACK	6	PCS	39.00			
☐	Item	23300146		Uma Skirt	White,46	BLACK	5	PCS	39.00			
☐	Item	23300148		Uma Skirt	White,48	BLACK	4	PCS	39.00			
☐	Item	23300150		Uma Skirt	White,50	BLACK	3	PCS	39.00			
☐	Item	23300152		Uma Skirt	White,52	BLACK	2	PCS	39.00			
☐	Item	23306536		Uma Skirt	Lawn Green,36	BLACK	2	PCS	39.00			
☐	Item	23306538		Uma Skirt	Lawn Green,38	BLACK	3	PCS	39.00			
☐	Item	23306540		Uma Skirt	Lawn Green,40	BLACK	4	PCS	39.00			
☐	Item	23306542		Uma Skirt	Lawn Green,42	BLACK	5	PCS	39.00			

NOTE

In the previous paragraph we have replenished the Pick Bins from the Bulk Bins to a maximum of 5 pieces. We have ordered 6 pieces for some Uma Skirt variants. This is more than the content in the Pick Bins. Below is described how the system handles this.

Although this scenario concerns Fashion products, we **skip** the creation of a Shipment from the **TRIMIT Pick Document**. This procedure is described in the previous chapter and is identical for a **Location Code** with **Directed Pick and Put-away**. Therefore, we are creating Shipment Lines directly from a **Warehouse Shipment**.

Choose **Location Code BLACK**. The default **Zone** Code and the **Bin** Code are entered automatically.

Warehouse Shipment | Work Date: 06/09/2020

TSH000003

Process | Print/Send | Release | Posting | Shipment | Navigate | Actions | Related | Fewer options

Autofill Qty. to Ship | Use Filters to Get Src. Docs... | **Get Source Documents...** | Create Pick...

No. TSH000003

Location Code BLACK

Zone Code SHIP

Bin Code SHIP_STACKED

Document Status

Status Open

Posting Date 06/09/2020

Click **Process, Get Source Documents...** and we select **Sales Order SW003**. The Shipment Lines will now be in the Warehouse Shipment.

Source Documents - BLACK · Black Warehouse (WMS)

Shipment Date ↑	Put-away / Pick No.	Source Document ↑	Source No. ↑	External Document No.	Destination Type	Destination No.	Shipping Agent Code	
23/01/2020	—	Sales Order	SW001		Customer	2000		
23/01/2020	—	Sales Order	SW002		Customer	2020	FEDEX	
→ 23/01/2020	—	Sales Order	SW003		Customer	2000		
23/01/2020	—	Sales Order	SW009		Customer	2000		

Warehouse Shipment | Work Date: 06/09/2020

TSH000003

Process | Print/Send | Release | Posting | Shipment | Navigate | Actions | Related | Fewer options

Autofill Qty. to Ship | Use Filters to Get Src. Docs... | Get Source Documents... | **Create Pick...**

Exp... Mat...	Type	Source Document	Source No.	Item No.	Description	Description 2	Quantity	Qty. to Ship	Complete Shipment of Line	Qty. Shipped	Qty. Outstanding	Due Date
→ ☒	Matrix	Sales Order	SW003	2330	Uma Skirt		102	0	No	0	102	23/01
☐	Item	Sales Order	SW003	23300136	Uma Skirt	White,36	2	0	No	0	2	23/01
☐	Item	Sales Order	SW003	23300138	Uma Skirt	White,38	3	0	No	0	3	23/01
☐	Item	Sales Order	SW003	23300140	Uma Skirt	White,40	4	0	No	0	4	23/01
☐	Item	Sales Order	SW003	23300142	Uma Skirt	White,42	5	0	No	0	5	23/01
☐	Item	Sales Order	SW003	23300144	Uma Skirt	White,44	6	0	No	0	6	23/01
☐	Item	Sales Order	SW003	23300146	Uma Skirt	White,46	5	0	No	0	5	23/01
☐	Item	Sales Order	SW003	23300148	Uma Skirt	White,48	4	0	No	0	4	23/01
☐	Item	Sales Order	SW003	23300150	Uma Skirt	White,50	3	0	No	0	3	23/01
☐	Item	Sales Order	SW003	23300152	Uma Skirt	White,52	2	0	No	0	2	23/01
☐	Item	Sales Order	SW003	23306536	Uma Skirt	Lawn Green,36	2	0	No	0	2	23/01
☐	Item	Sales Order	SW003	23306538	Uma Skirt	Lawn Green,38	3	0	No	0	3	23/01
☐	Item	Sales Order	SW003	23306540	Uma Skirt	Lawn Green,40	4	0	No	0	4	23/01
☐	Item	Sales Order	SW003	23306542	Uma Skirt	Lawn Green,42	5	0	No	0	5	23/01

NOTE

For Products with other Warehouse Classes, the Warehouse Zone and Bin Codes stay empty. These needs to be filled manually. Make them visible in the page if this is the situation.

From the **Warehouse Shipment** we create the **Warehouse Pick** by clicking **Process, Create Pick....**
Let us confirm this action by clicking **OK** twice. Now a Warehouse Pick has been created.

Whse.-Shipment - Create Pick

Options

Assigned User ID

Sorting Method for Activity Lines

Set Breakbulk Filter

Do Not Fill Qty. to Handle

Prioritize lines with item tracking

Print Document

Advanced

OK

Cancel

Pick activity no. TPI000002 has been created.

OK

Just as in the Warehouse Put-away and in the Movement, for every Warehouse Shipment Line two **Pick Lines** were created for the *Take* and the *Place* of the Items. However, there are exceptions. We can see that for instance for **Item 2300144** there are two sets of **Pick Lines** created. That has to do with the fact that the **Pick Bin** only contains 5 pieces. The Shipment, however, requires 6 pieces. Therefore, the system suggests picking the 6th one directly from the **Bulk Bin**.

Warehouse Pick | Work Date: 06/09/2020

Save

Pick · TPI000002

Process

Print/Send

Pick

Navigate

Actions

Related

Fewer options

Register Pick

Lines

Manage

Fewer options

Source Document	Source No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Qty. Outstanding	Due Date	Unit of Measure Code
→ Sales Order	SW003	23300136	Uma Skirt	White,36	X1-Y1-Z1	2	2	0	2	23/01/2020	PCS
Sales Order	SW003	23300136	Uma Skirt	White,36	SHIP_STACKED	2	2	0	2	23/01/2020	PCS
Sales Order	SW003	23300138	Uma Skirt	White,38	X1-Y1-Z2	3	3	0	3	23/01/2020	PCS
Sales Order	SW003	23300138	Uma Skirt	White,38	SHIP_STACKED	3	3	0	3	23/01/2020	PCS
Sales Order	SW003	23300140	Uma Skirt	White,40	X1-Y1-Z3	4	4	0	4	23/01/2020	PCS
Sales Order	SW003	23300140	Uma Skirt	White,40	SHIP_STACKED	4	4	0	4	23/01/2020	PCS
Sales Order	SW003	23300142	Uma Skirt	White,42	X1-Y1-Z4	5	5	0	5	23/01/2020	PCS
Sales Order	SW003	23300142	Uma Skirt	White,42	SHIP_STACKED	5	5	0	5	23/01/2020	PCS
Sales Order	SW003	23300144	Uma Skirt	White,44	X1-Y1-Z5	5	5	0	5	23/01/2020	PCS
Sales Order	SW003	23300144	Uma Skirt	White,44	SHIP_STACKED	5	5	0	5	23/01/2020	PCS
Sales Order	SW003	23300144	Uma Skirt	White,44	BULK095	1	1	0	1	23/01/2020	PCS
Sales Order	SW003	23300144	Uma Skirt	White,44	SHIP_STACKED	1	1	0	1	23/01/2020	PCS
Sales Order	SW003	23300146	Uma Skirt	White,46	X1-Y2-Z1	5	5	0	5	23/01/2020	PCS
Sales Order	SW003	23300146	Uma Skirt	White,46	SHIP_STACKED	5	5	0	5	23/01/2020	PCS

The moment the Garments have been transferred to the Expedition area; we can register the Warehouse Pick by clicking **Process, Register Pick**. After confirming the registering, the Warehouse Pick vanishes.

Do you want to register the Pick Document?

The next thing is to go back to the Shipment and Post this when the Garments leave the Warehouse. This process is identical to posting the Warehouse Shipment as described in the previous chapter and will not be discussed here.

TRIMIT PRODUCTION AND BC WAREHOUSING

INTRODUCTION

In this chapter, we will discuss the integration of **TRIMIT Production** with the standard BC Warehousing Features. Since TRIMIT Production has nothing in common with standard BC Manufacturing, this area contains the most extra developed Integration.

If the **Costing method** is *Standard Costing*, it is possible in TRIMIT to create negative stock after consumption of the Raw Materials. However, on Locations with Warehousing involved this is not allowed, because you cannot have negative stocks on Bins.

To see whether there is enough stock of Raw Materials or Sub-Assemblies available TRIMIT has developed a report called **Check Material Shortage** which can only be used via a (TRIMIT) Production Order or a Production Collecting Order.

In this chapter, we will discuss the following scenarios:

- Warehouse Activities on TRIMIT Production Orders
- Warehouse Activities on TRIMIT Related Orders (including Warehouse Movements)
- Warehouse Activities on TRIMIT Production Collecting Orders

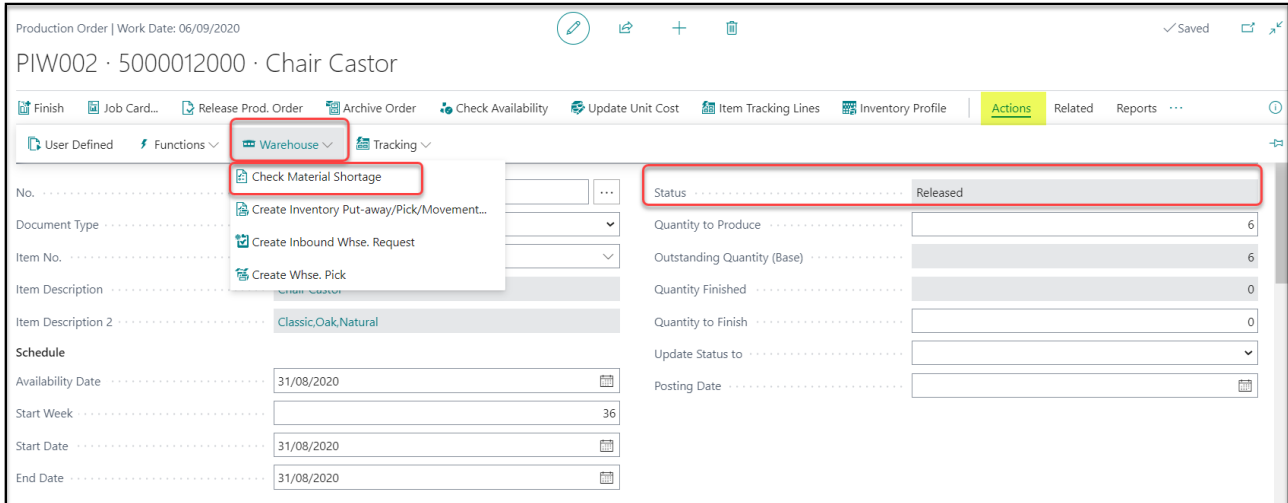
To show different warehousing scenarios combined with TRIMIT Production we have created in the Demo Company several Masters for which there is sufficient stock of Raw Materials in the Warehouse. These Masters are:

Master No.	Description	Production Location	Raw Materials Location
5000	Chair Castor	<i>ORANGE</i>	<i>ORANGE</i>
5000	Chair Castor	<i>GREEN</i>	<i>GREEN</i>
2200	Grace Bomber	<i>BLACK</i>	<i>BLACK</i>
5200	Sofa Persephone	<i>GREY</i>	<i>GREY</i>

SHORTAGE LIST

Before the Production Starts, it could be useful to check whether there is enough stock present on the production Location. To support this TRIMIT has developed a report called **Check Material Shortage**. This report can be used independent if a Location needs Warehouse Activities or not. Let us have a look at this report more closely.

Below you can see *Released Production Order PIW002* for 6 pieces of *Chair Castor (Classic, Oak, Natural)*. Let us have a look at the Check Material Shortage Report by clicking **Actions, Warehouse, Check Material Shortage**. In the standard filter the current Production Order is mentioned. In that case the Material Shortage will only be calculated for Production Order *PIW002*.



Production Order | Work Date: 06/09/2020

PIW002 · 5000012000 · Chair Castor

Finish Job Card... Release Prod. Order Archive Order Check Availability Update Unit Cost Item Tracking Lines Inventory Profile Actions Related Reports

User Defined Functions Warehouse Tracking

Check Material Shortage

Create Inventory Put-away/Pick/Movement...

Create Inbound Whse. Request

Create Whse. Pick

No.

Document Type

Item No.

Item Description

Item Description 2 ClassicOak,Natural

Schedule

Availability Date 31/08/2020

Start Week 36

Start Date 31/08/2020

End Date 31/08/2020

Status Released

Quantity to Produce 6

Outstanding Quantity (Base) 6

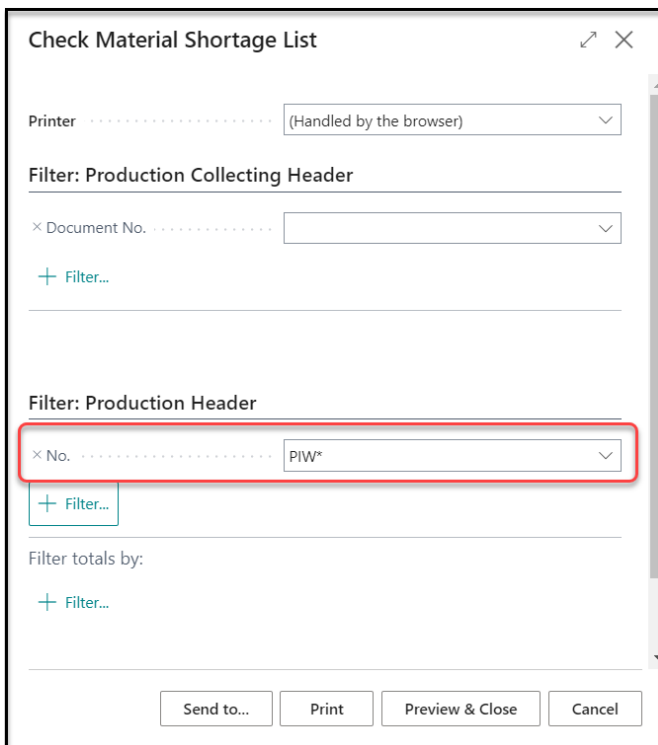
Quantity Finished 0

Quantity to Finish 0

Update Status to

Posting Date

However, in this special case I would like to calculate the Material Shortage for all Production Orders starting with PIW by placing PIW* in the **Production Order Filter**.



Check Material Shortage List

Printer (Handled by the browser)

Filter: Production Collecting Header

X Document No.

+ Filter...

Filter: Production Header

X No. PIW*

+ Filter...

Filter totals by:

+ Filter...

Send to... Print Preview & Close Cancel

NOTE

This way the **Check Material Shortage** report totalizes all the required Raw Materials and/or Sub-Assemblies for the sum of all Production Orders within the filter. It is not a report that tells you which Production Order can be executed based on the present stock of the components. It is all or nothing!

Below the report is shown. You can see the **Quantity (Outstanding Qty)** of components that is needed for this set of Production Orders and the quantity of these component that are presently on stock on all the

Locations. This means that you can see also the present stock on other Locations than on the Production Location. Therefore, we have introduced the **Shortage Indicator**.

Shortage List										
No.: PIW*										
24-11-2022										
Non Handled Items and Items in Progress										
Item No	Description	Description2	Location Code	Consumption Qty	Picked Qty	Pick Qty	Outstanding Qty	Available Qty Location	Available Qty All Locations	Shortage Indicator
M300501200000	Chair Seat	Classic,Oak,Wood,Natural	ORANGE	6.00	0.00	0.00	6.00	0.00	1,000.00	🟡
M300501200000	Alternative Location that demands Movement		BLUE	Blue Warehouse				1,000.00		
M300503300000	Chair Seat	Retro,Walnut,Wood,Natural	GREEN	10.00	0.00	0.00	10.00	100.00	100.00	🟢
M30100120B	Chair Legs	Classic,Oak,Back	ORANGE	12.00	0.00	0.00	12.00	0.00	3,000.00	🟡
M30100120B	Alternative Location that demands Movement		BLUE	Blue Warehouse				3,000.00		
M30100120F	Chair Legs	Classic,Oak,Front	ORANGE	12.00	0.00	0.00	12.00	0.00	3,000.00	🟡
M30100120F	Alternative Location that demands Movement		BLUE	Blue Warehouse				3,000.00		
M30100330B	Chair Legs	Retro,Walnut,Back	GREEN	20.00	0.00	0.00	20.00	200.00	200.00	🟢
M30100330F	Chair Legs	Retro,Walnut,Front	GREEN	20.00	0.00	0.00	20.00	200.00	200.00	🟢
M30200120	Chair Top Peace	Classic,Oak	ORANGE	6.00	0.00	0.00	6.00	0.00	1,800.00	🟡
M30200120	Alternative Location that demands Movement		BLUE	Blue Warehouse				1,800.00		
M30200330	Chair Top Peace	Retro,Walnut	GREEN	10.00	0.00	0.00	10.00	100.00	100.00	🟢
M30300120	Chair Bar	Classic,Oak	ORANGE	18.00	0.00	0.00	18.00	0.00	1,725.00	🟡
M30300120	Alternative Location that demands Movement		BLUE	Blue Warehouse				1,725.00		
M30300330	Chair Bar	Retro,Walnut	GREEN	10.00	0.00	0.00	10.00	0.00	0.00	🔴
M399500	Oil (for impregnation)	Clear	GREEN	3.80	0.00	0.00	3.80	50.00	550.00	🟢
M399500	Alternative Location that demands Movement		BLUE	Blue Warehouse				500.00		

A quick look at the Shortage Indicator provides insight regarding the Raw Materials:

- **Green:** There is enough available on Stock for this Raw Material on the Consumption Location.
- **Yellow:** There is enough on Stock, but not on the appropriate Consumption Location.
- **Red:** This Shortage Indicator tells you that you do not have enough of this Raw Material in Stock.

Normally you can start the Production only, if you have all the Raw Materials and Sub-Assemblies present. This means that all **Shortage Indicators** should be **Green**. You could make an exception, if one or more components are not present yet, but are expected shortly. You can start the production with the other components and add the incoming ones later. That is for the user to decide.

In case the **Shortage Indicator** is **Yellow**, extra lines are created that tell you the other Location(s) on which these components can be found. To fulfill this demand components can be transferred from one of those other Locations, received from a Purchase Order or finished from a lower-level Production Order. This can be done manually or calculated by the system via an **MRP**².

If the **Shortage Indicator** is **Red**, then the required component is not on stock. It could be that the Raw Materials still need to be received from a Purchase Order or a Sub-Assembly that still needs to be finished. However, it could also be that Raw Materials still need to be purchased. An MRP Run will provide the answer. Like with Yellow: the steps can also be taken manually.

Let us have a look now at the Check Shortage Report specifically for this **Production Order PIW002** by running the report without changing the Filter. Then we see only the components required for this Production Order.

² If you want to have the MRP calculating Transfer Orders, you may have to setup the appropriate Stock Keeping Units. This is not discussed in this document.

Shortage List										
No.: PIW002										
Non Handled Items and Items in Progress										
Item No	Description	Description2	Location Code	Consumption Qty	Picked Qty	Pick Qty	Outstanding Qty	Available Qty Location	Available Qty A77 Locations	Shortage Indicator
M300501200000	Chair Seat	Classic,Oak,Wood,Natura	ORANGE	6.00	0	0	6.00	0.00	1,000.00	1
M300501200000	Alternative Location that demands Movement		BLUE	BLUE				1,000.00		1
M30100120B	Chair Legs	Classic,Oak,Back	ORANGE	12.00	0	0	12.00	0.00	3,000.00	1
M30100120B	Alternative Location that demands Movement		BLUE	BLUE				3,000.00		1
M30100120F	Chair Legs	Classic,Oak,Front	ORANGE	12.00	0	0	12.00	0.00	3,000.00	1
M30100120F	Alternative Location that demands Movement		BLUE	BLUE				3,000.00		1
M30200120	Chair Top Peace	Classic,Oak	ORANGE	6.00	0	0	6.00	0.00	1,800.00	1
M30200120	Alternative Location that demands Movement		BLUE	BLUE				1,800.00		1
M30300120	Chair Bar	Classic,Oak	ORANGE	18.00	0	0	18.00	0.00	1,725.00	1
M30300120	Alternative Location that demands Movement		BLUE	BLUE				1,725.00		1

Note that the **Shortage Indicator** for all Components are Yellow: they are available on **Location Code BLUE** but not on **Location Code ORANGE**. For this scenario we have decided that we want to transfer the components from **Location Code BLUE** to **ORANGE**. A **Transfer Order** has already been created manually in the system: **T0001**.

Transfer Order | Work Date: 06/09/2020

+

✓ Saved

T0001

Report
Release
Posting
Order
Print/Send
Navigate
More options

General

Transfer-from Code
BLUE

In-Transit Code
OWN LOG.

Transfer-to Code
ORANGE

Posting Date
06/09/2020

Direct Transfer
☐

Status
Released

Lines
Manage
More options

Expa... Matrix	Type	Item No.	Description	Description 2	Quantity	Unit of Measure Code	Qty. to Ship	Quantity Shipped	Qty. to Receive	Quantity Received
→ ☐	Item	M3005012000...	Chair Seat	Classic,Oak,Wood,Natural	100	PCS	100	-	-	-
☐	Item	M30100120B	Chair Legs	Classic,Oak,Back	200	PCS	200	-	-	-
☐	Item	M30100120F	Chair Legs	Classic,Oak,Front	200	PCS	200	-	-	-
☐	Item	M30200120	Chair Top Peace	Classic,Oak	100	PCS	100	-	-	-
☐	Item	M30300120	Chair Bar	Classic,Oak	300	PCS	300	-	-	-

Let us ship this Transfer Order. Since **Location Code BLUE** does not require warehouse functionality, we can just **Post** this Transfer Order. Confirm the Shipping and the Raw Materials are on its way.

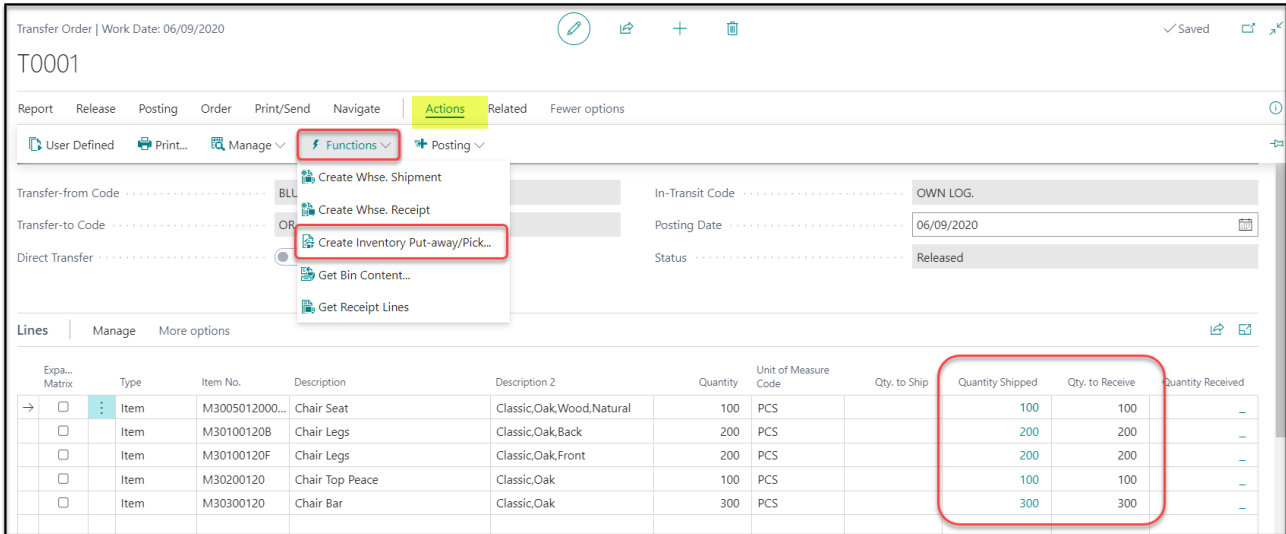
i

☒ Ship
☐ Receive

OK

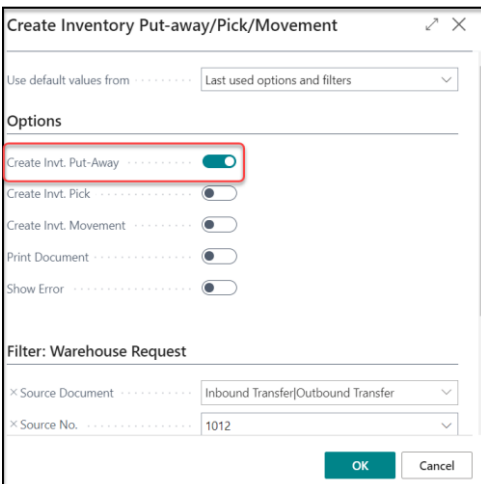
Cancel

In the Transfer Order we see that the Items are shipped, but still need to be received on **Location Code ORANGE**. **Location Code ORANGE** requires **Inventory Put-away**. To create the Inventory Put-away we click **Actions, Functions, Create Inventory Put-away/Pick....**



Exp... Matrix	Type	Item No.	Description	Description 2	Quantity	Unit of Measure Code	Qty. to Ship	Quantity Shipped	Qty. to Receive	Quantity Received
→	☐	Item	M3005012000...	Chair Seat	Classic,Oak,Wood,Natural	100	PCS	100	100	—
	☐	Item	M30100120B	Chair Legs	Classic,Oak,Back	200	PCS	200	200	—
	☐	Item	M30100120F	Chair Legs	Classic,Oak,Front	200	PCS	200	200	—
	☐	Item	M30200120	Chair Top Peace	Classic,Oak	100	PCS	100	100	—
	☐	Item	M30300120	Chair Bar	Classic,Oak	300	PCS	300	300	—

This works the same way as creating the Inventory Put-away on Purchase Orders. Make sure that you have the appropriate setting and click **OK**. Click a second time on **OK** to confirm that an **Inventory Put-away** has been created. We can see this document by clicking **Related, Warehouse, Invt. Put-away/Pick Lines....**



Use default values from: Last used options and filters

Options

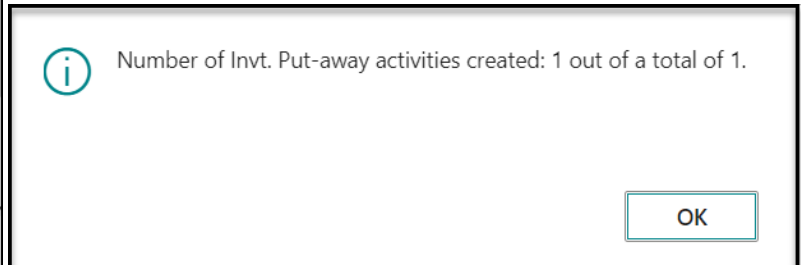
- Create Invt. Put-Away: ☒
- Create Invt. Pick: ☐
- Create Invt. Movement: ☐
- Print Document: ☐
- Show Error: ☐

Filter: Warehouse Request

× Source Document: Inbound Transfer/Outbound Transfer

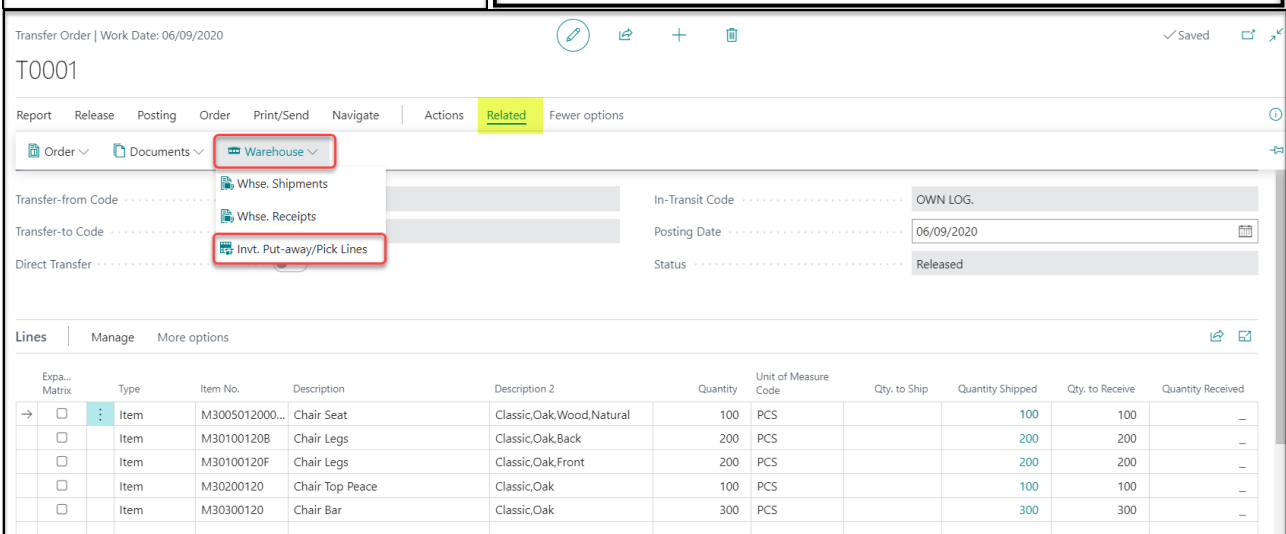
× Source No.: 1012

OK Cancel



Number of Invt. Put-away activities created: 1 out of a total of 1.

OK



Exp... Matrix	Type	Item No.	Description	Description 2	Quantity	Unit of Measure Code	Qty. to Ship	Quantity Shipped	Qty. to Receive	Quantity Received
→	☐	Item	M3005012000...	Chair Seat	Classic,Oak,Wood,Natural	100	PCS	100	100	—
	☐	Item	M30100120B	Chair Legs	Classic,Oak,Back	200	PCS	200	200	—
	☐	Item	M30100120F	Chair Legs	Classic,Oak,Front	200	PCS	200	200	—
	☐	Item	M30200120	Chair Top Peace	Classic,Oak	100	PCS	100	100	—
	☐	Item	M30300120	Chair Bar	Classic,Oak	300	PCS	300	300	—

The **Inventory Put-away** will be handled the same way as when you receive a Purchase Order. First thing is to **Autofill the Quantity to Handle** by clicking **Actions, Functions, Autofill Qty. to Handle**. And then Post the Inventory Put-away by clicking **Actions, Posting, Post**.

Inventory Put-away | Work Date: 06/09/2020

Inv. Put-away · TIPU000002

Process Print/Send Posting **Actions** Related Reports Fewer options

Functions **Autofill Qty. to Handle** Print...

Get Source Document... TIPU000002 Posting Date 06/09/2020

Autofill Qty. to Handle ORANGE Expected Receipt Date 06/09/2020

Delete Qty. to Handle Inbound Transfer External Document No.

Source No. T0001 External Document No.2

Location Code ORANGE Container No.

Location Name Orange Warehouse

Lines Manage More options

Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Complete Receipt of Line	Qty. Outstanding	Due Date	Unit of Measure Code
M3005012000...	Chair Seat	Classic,Oak,Wood,Natural		100	100	0	No	100	06/09/2020	PCS
M30100120B	Chair Legs	Classic,Oak,Back		200	200	0	No	200	06/09/2020	PCS
M30100120F	Chair Legs	Classic,Oak,Front		200	200	0	No	200	06/09/2020	PCS
M30200120	Chair Top Peace	Classic,Oak		100	100	0	No	100	06/09/2020	PCS
M30300120	Chair Bar	Classic,Oak		300	300	0	No	300	06/09/2020	PCS

Now we should have sufficient stock of the required components on **Location Code ORANGE**. Let us check that on **Production Order PIW002**. The Report Check Material Shortage shows that this time all Shortage Indicators are **Green**. (It is also possible to consume the Raw Materials together with posting. In that case the Shortage List will be empty.)

Shortage List 24-11-2022

No.: PIW002

Non Handled Items and Items in Progress

Item No	Description	Description2	Location Code	Consumption Qty	Picked Qty	Pick Qty	Outstanding Qty	Available Qty Location	Available Qty All Locations	Shortage Indicator
M300501200000	Chair Seat	Classic,Oak,Wood,Natural	ORANGE	6.00	0.00	0.00	6.00	100.00	1,000.00	✓
M300501200000	Alternative Location that demands Movement		BLUE	Blue Warehouse				900.00		
M30100120B	Chair Legs	Classic,Oak,Back	ORANGE	12.00	0.00	0.00	12.00	200.00	3,000.00	✓
M30100120B	Alternative Location that demands Movement		BLUE	Blue Warehouse				2,800.00		
M30100120F	Chair Legs	Classic,Oak,Front	ORANGE	12.00	0.00	0.00	12.00	200.00	3,000.00	✓
M30100120F	Alternative Location that demands Movement		BLUE	Blue Warehouse				2,800.00		
M30200120	Chair Top Peace	Classic,Oak	ORANGE	6.00	0.00	0.00	6.00	100.00	1,800.00	✓
M30200120	Alternative Location that demands Movement		BLUE	Blue Warehouse				1,700.00		
M30300120	Chair Bar	Classic,Oak	ORANGE	18.00	0.00	0.00	18.00	300.00	1,725.00	✓
M30300120	Alternative Location that demands Movement		BLUE	Blue Warehouse				1,425.00		

INVENTORY PICK ON PRODUCTION ORDER

However, before we can start manufacturing on **Location Code ORANGE**, we need to pick the components from the warehouse and bring them to the Shop Floor. In **Production Order PIW002** click **Actions, Warehouse, Create Inventory Put-away/Pick/Movement...** to we create an Inventory Pick for all the Raw Materials that require Warehouse Pick³.

³ Only Items for which **Require Pick for Production** has been set to YES. See paragraph [Master & Item Setup](#).

Production Order | Work Date: 06/09/2020

PIW002 · 5000012000 · Chair Castor

Finish Job Card... Release Prod. Order Archive Order Check Availability Update Unit Cost Item Tracking Lines Inventory Profile **Actions** Related Reports

User Defined Functions **Warehouse** Tracking

Check Material Shortage

Create Inventory Put-away/Pick/Movement...

Create Inbound Whse. Request

Create Whse. Pick

No.

Document Type

Item No.

Item Description

Item Description 2 Classic,Oak,Natural

Schedule

Availability Date 31/08/2020

Start Week 36

Start Date 31/08/2020

End Date 31/08/2020

Status Released

Quantity to Produce 6

Outstanding Quantity (Base) 6

Quantity Finished 0

Quantity to Finish 0

Update Status to

Posting Date

Create Inventory Put-away/Pick/Movement

Use default values from Last used options and filters

Options

Create Invt. Put-Away

Create Invt. Pick

Create Invt. Movement

Print Document

Show Error

Filter: Warehouse Request

× Source Document Prod. Consumption|Prod. Output

× Source No. PIW002

+ Filter...

OK Cancel

Number of Invt. Pick activities created: 1 out of a total of 1.

OK

Let us have a look at this Inventory Pick. One way is by clicking **Related, Warehouse, Put-away/Pick Lines/Movement Lines**. In the **Inventory Pick Lines**, we click **Card** to go to the **Inventory Pick**.

Production Order | Work Date: 06/09/2020

PIW002 · 5000012000 · Chair Castor

Finish Job Card... Release Prod. Order Archive Order Check Availability Update Unit Cost Item Tracking Lines Inventory Profile **Actions** **Related** Reports

Dimensions Edit VarDim Comments Where-Used List Inventory Profile Warehouse Entries

Lines Formula Lines Workflow Bill of Materials Production Entries **Warehouse**

Put-away/Pick Lines/Movement Lines

Registered Pick Lines

Registered Invt. Movement Lines

Document Type Order

Item No. 5000012000

Item Description Chair Castor

Item Description 2 Classic,Oak,Natural

Schedule

Availability Date 31/08/2020

Start Week 36

Start Date 31/08/2020

End Date 31/08/2020

Quantity to Produce 6

Outstanding Quantity (Base) 6

Quantity Finished 0

Quantity to Finish 0

Update Status to

Posting Date

Inventory Pick Lines | Work Date: 06/09/2020

Warehouse Activity Lines | Search | Card | Show Whse. Document | More options

No.	Line No.	Source No.	Source Line No.	Source Document	Location Code	Shelf No.	Item No.	Unit of Measure Code	Qty. per Unit of Measure	Description	Quantity	Qty. (Base)	Outstand
TIPI000004	10000	PIW002		Prod. Cons...	ORANGE		M300501200...	PCS	1	Chair Seat	6	6	
TIPI000004	20000	PIW002		Prod. Cons...	ORANGE		M30100120F	PCS	1	Chair Legs	12	12	
TIPI000004	30000	PIW002		Prod. Cons...	ORANGE		M30100120B	PCS	1	Chair Legs	12	12	
TIPI000004	40000	PIW002		Prod. Cons...	ORANGE		M30200120	PCS	1	Chair Top Peace	6	6	
TIPI000004	50000	PIW002		Prod. Cons...	ORANGE		M30300120	PCS	1	Chair Bar	18	18	

Edit - Inventory Pick - Invt. Pick - TIPI000004

Manage Process Print/Send Posting Actions Related Reports Fewer options

Functions Posting Print...

Get Source Document... ORANGE

Autofill Qty. to Handle

Delete Qty. to Handle

Item No. 5000012000

Item Description Chair Castor

External Document No. External Document No.2

Pick Document No. Container No.

Lines Manage Functions Line Fewer options

Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Complete Shipment of Line	Qty. Outstanding	Unit of Measure Code
M300501200000	Chair Seat	Classic,Oak,Wood,Natural		6	0	0	No	6	PCS
M30100120F	Chair Legs	Classic,Oak,Front		12	0	0	No	12	PCS
M30100120B	Chair Legs	Classic,Oak,Back		12	0	0	No	12	PCS
M30200120	Chair Top Peace	Classic,Oak		6	0	0	No	6	PCS
M30300120	Chair Bar	Classic,Oak		18	0	0	No	18	PCS

From here the **Inventory Pick** is managed just as you handle an Inventory Pick for a Sales Order. First fill in the **Qty. to Handle** for instance by clicking **Actions, Functions, Autofill Qty. to Handle**. Then you can **post** the pick. Now the components are at the Shop Floor and the **Production Order** can actually start. Finishing the Production Order gets the Chair in stock. An Inventory pick from the Sales Order should be enough to pick this Item from stock and ship it.

TRIMIT PRODUCTION ORDER WITH BC BASIC WAREHOUSING

In this paragraph, we will discuss how basic Warehousing interacts with TRIMIT Production. To show this we have a Released **Production Order PIW001** for 10 pieces of **Item No. 5000033020 (Chair Castor, Retro, Walnut. Oil)**. The Location for this Production Order is **GREEN**.

Production Order | Work Date: 06/09/2020

PIW001 · 5000033020 · Chair Castor

Finish Job Card... Release Prod. Order Archive Order Check Availability Update Unit Cost Item Tracking Lines Inventory Profile Actions Related Reports ...

General

No. PIW001

Document Type Order

Item No. 5000033020

Item Description Chair Castor

Item Description 2 Retro,Walnut,Oil

Schedule

Availability Date 31/08/2020

Start Week 36

Status Released

Quantity to Produce 10

Outstanding Quantity (Base) 10

Quantity Finished 0

Quantity to Finish 0

Update Status to

Posting Date

In this scenario we will have enough Raw Materials on stock to fulfill this Production Order. We can see this when we run the **Check Material Shortage** report. All Shortage Indicators are set to **Green** except for Item

30300330. Because this Chair Bar can always be mounted later on the Chair, we decided to start the production anyway.

Shortage List										24-11-2022
No.: PIW001										
Non Handled Items and Items in Progress										
Item No	Description	Description2	Location Code	Consumption Qty	Picked Qty	Pick Qty	Outstanding Qty	Available Qty Location	Available Qty All Locations	Shortage Indicator
M300503300000	Chair Seat	Retro,Walnut,Wood,Natural	GREEN	10.00	0.00	0.00	10.00	100.00	100.00	✓
M30100330B	Chair Legs	Retro,Walnut,Back	GREEN	20.00	0.00	0.00	20.00	200.00	200.00	✓
M30100330F	Chair Legs	Retro,Walnut,Front	GREEN	20.00	0.00	0.00	20.00	200.00	200.00	✓
M30200330	Chair Top Peace	Retro,Walnut	GREEN	10.00	0.00	0.00	10.00	100.00	100.00	✓
M30300330	Chair Bar	Retro,Walnut	GREEN	10.00	0.00	0.00	10.00	0.00	0.00	✗
M399500	Oil (for impregnation)	Clear	GREEN	3.80	0.00	0.00	3.80	50.00	550.00	✓
M399500	Alternative Location that demands Movement		BLUE			Blue Warehouse		500.00		

Let us make a Pick for the Raw Materials of this Production Order on **Location Code** GREEN using basic BC Warehousing functionality by clicking **Actions, Warehouse, Create Whse. Pick**. Click **OK** twice and confirm that the appropriate **Pick Activity** has been created. In this case it is **Warehouse Pick TP1000003**.

Production Order | Work Date: 06/09/2020

PIW001 · 5000033020 · Chair Castor

Finish Job Card... Release Prod. Order Archive Order Check Availability Update Unit Cost Item Tracking Lines Inventory Profile **Actions** Related Reports ...

User Defined Functions Warehouse Tracking ▾

- Check Material Shortage
- Create Inventory Put-away/Pick/Movement...
- Create Inbound Whse. Request
- Create Whse. Pick**

No.	Status
	Released

Document Type	Quantity to Produce
	10

Item No.	Outstanding Quantity (Base)
	10

Item Description	Quantity Finished
	0

Item Description 2	Quantity to Finish
Retro,Walnut,Oil	0

Whse.-Source-Create Document

Options

Assigned User ID:

Sorting Method for Activity Lines: ▾

Set Breakbulk Filter: ☒

Do Not Fill Qty. to Handle: ☒

Print Document: ☒

Advanced >

OK Cancel

Pick activity no. TPI000003 has been created.

OK

Warehouse Pick | Work Date: 06/09/2020

Pick · TPI000003

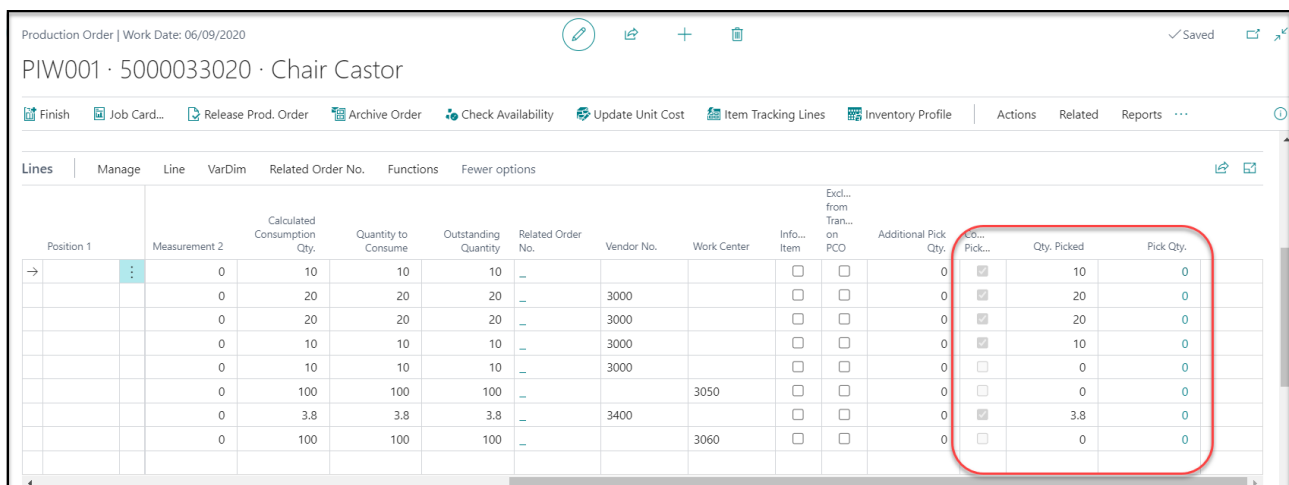
Process Print/Send Pick Navigate **Actions** Related Fewer options

Functions ▾ Registering ▾ Print...

Lines	Manage	More options									
Source Document	Source No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Qty. Outstanding	Due Date	Unit of Measure Code
→ Prod. Cons...	PIW001	M300503300...	Chair Seat	Retro,Walnut,Wood,Natural		10	10	0	10	31/08/2020	PCS
Prod. Cons...	PIW001	M30100330F	Chair Legs	Retro,Walnut,Front		20	20	0	20	31/08/2020	PCS
Prod. Cons...	PIW001	M30100330B	Chair Legs	Retro,Walnut,Back		20	20	0	20	31/08/2020	PCS
Prod. Cons...	PIW001	M30200330	Chair Top Peace	Retro,Walnut		10	10	0	10	31/08/2020	PCS
Prod. Cons...	PIW001	M399500	Oil (for impregnation)	Clear		3.8	3.8	0	3.8	31/08/2020	L

Let us have a look at the created **Warehouse Pick** *TP1000003*. Here we see that all the components needed for this Production Order are in except for the Chair Bar. After the Picking of the components that are available has been completed, we can register the Warehouse Pick by clicking **Process, Register Pick**. After registering the Pick will be gone.

When we go back to the **Production Order** *PIW001* and scroll to the right on the **Component Lines**, we can see on the Lines that the **Quantities** are picked and that the Pick is **Completed** in this case except for the *Chair Bar* and the *Mounting Operation*. Note that the **Quantity to Consume** has not changed after registering the Warehouse Pick and the **Quantity Consumed** is still *0*.



Position 1	Measurement 2	Calculated Consumption Qty.	Quantity to Consume	Outstanding Quantity	Related Order No.	Vendor No.	Work Center	Info... Item	Excl... from Tran... on PCO	Additional Pick Qty.	Pick...	Pick...	Qty. Picked	Pick Qty.
→	0	10	10	10	—			☐	☐	0	☐	☐	10	0
	0	20	20	20	—	3000		☐	☐	0	☐	☐	20	0
	0	20	20	20	—	3000		☐	☐	0	☐	☐	20	0
	0	10	10	10	—	3000		☐	☐	0	☐	☐	10	0
	0	10	10	10	—	3000		☐	☐	0	☐	☐	0	0
	0	100	100	100	—		3050	☐	☐	0	☐	☐	0	0
	0	3.8	3.8	3.8	—	3400		☐	☐	0	☐	☐	3.8	0
	0	100	100	100	—		3060	☐	☐	0	☐	☐	0	0

PRODUCTION PICK WITH DIRECTED PICK/PUT-AWAY

Directed Pick and Put-away are functionalities that work on the storage **Zones**: zones where you **Pick** the goods for **Shipments** or where you **Put-away** from **Receipts**. There is no directed Pick and Put-away for Movements from and to the **Shop Floor Bins**. Therefore, the **Pick** for Raw Materials on **Production Orders** work the same way as in the previous chapter, with the exception that **Take** and **Place Action Lines** are created on the Pages. We will see examples of these in the coming Chapters. Therefore, we will not go into detail in this paragraph.

CONFIGURABLE ITEMS AND ADVANCED WAREHOUSING

With the TRIMIT Configuration feature, it is possible to create an Item on the fly when entering a Master on the **Sales Order Line** and the **VarDim Order** values.

This could also result in a **Related Production Order**. This Production Order could be handled with BC Warehousing as described above. However, in case of **Directed Pick and Put-away** an issue could arise, if the configured Item does not have a unique Item Number.

In TRIMIT an Item is unique by its configuration as in the **VarDim Order** and therefore, a unique number is not required. However, these Items must have **Replenishment Policy Order**. An example of such a **Master** is *5010 (Chair Pollux)*. You can see the **No. System** does not include **VarDim Types** (MMMM) and has **Replenishment Policy Order**. The **Item No.** will be a generic number identical to the **Master No.**

Master Card | Work Date: 9/6/2020

5010 · Chair Pollux

New Process Reports Actions Related Reports Fewer options

General Show less

No. 5010 Private Label ☐

No. System MMMM Exclude from Collection ... ☐

Description Chair Pollux Blocked ☐

Description 2 Type Inventory

MRP

Include in MRP ☒

Automatic Replenishment ☐

Replenishment System Prod. Order

Replenishment Policy Order

Create Related Order Ins... ☒

MRP Method Net Requirement

Lock by Release of Relat... None

Material Consumption ... General

Material Consumption o... ☐ General

Finishing Method Relate... Independent of Shipment

Production Order No. M... ☐

BOM Information

BOM Yes

This works well in TRIMIT. However, if directed Pick and/or Put-away is involved, the system does not make a difference between two Pollux chairs, since they share the same **Item No.** The Bins do not have the characteristics of the VarDim Order. So, the system sends you to the first Bin with a Chair Pollux, which may or may not have the correct configuration.

There are several ways to solve this in the system:

1. Make sure that an Items gets a **unique Number**.

That could be an **intelligent Number** based on the **Master No**, plus the code of the **VarDim Options**. We can recognize the Masters from which the Items are originating by a **No. System** containing the characters (A till I and/or 1-3) in addition to the Master No.

If a product can't have an intelligent number because of the large number of Variants or Dimensions, then it is always possible to make the configured Item unique by giving it a **Sequential Number** added to the Master No. We can recognize the Master from which the Items are originating by its **No. System** with an L in it. For instance, Master 5200 (*Sofa Persephone*) that has a **No. System** MMMMLLLLL. These Items can be treated in the warehouse the same way as the Items with an intelligent No.

2. Make sure that all Items generated from a Master with a generic No. System are all stored on one and the same Bin. In that case you will always be directed to the right Bin.
3. Use Lot and/or Serial Numbering. This is standard BC functionality integrated with TRIMIT. In the Demo Scripts **TRIMIT 22.1 Sofa** the production process will be described in combination with Advanced Warehousing and Item Tracking.

TRIMIT PRODUCTION AND MOVEMENTS

In the previous paragraph we explained that Items created with a **Sequential Number** are treated the same as other unique Items as described in one of the previous paragraphs. In that paragraph also **Bin Replenishment** via **Movements** have been discussed. In this paragraph we are going into Movements from the Shop Floor to the Finished Product Storage. Also included is the description of **splitting** Movement Lines to different Bins.

In this scenario we will work with an Item with a Sequential Number configured from the **Master 5200** (*Sofa Persephone*). This Product is sold from and manufactured on **Location Code GREY**. Therefore, we created a **Released Sales Order SWO01** for **Customer 3000** (*The Furniture Shop*). We sell 2 *Sofa Persephone* with the same configuration as shown below.

Sales Order | Work Date: 06/09/2020

SWO01 · The Furniture Shop UK

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

General > 23/01/2020 23/01/2020 23/02/2020 Released

Lines Manage Line Order Fewer options

Exp... Mat...	Type	No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	VAT Area Code	VAT Group Code	Line
→	Item	520000001	Sofa Persephone		GREY	2	PCS	500.00			

Invoice Details > GBP 1M(8D)

Shipping and Billing Show more

Ship-to Alternate Shipping Address Bill-to Default (Customer)

Code LONDON Location Code GREY

Name The Furniture Shop UK Shipment Date 23/01/2020

Edit - VarDim Orders

Actions Related

Description	Value	Name	Adjustment Amount Sales	Dimension 2
Sofa Frame Parts	52002	Persephone 2 Seater	0.00	No
Box Exterior Material	55	Leather	0.00	No
Box Exterior Color	40	Brown	0.00	No
Fabric Pattern	00	One Color	0.00	No
Cushion Color	75	Salmon	0.00	No
Pillow Type	10	Small	0.00	No
→ Feet Color	99	Black	0.00	No

Also **Related Production Order** has been (automatically) created. This **Production Order PO000001** has been finished by posting an **Output** of 2 sofas. So the status is that the two Sofas are on the Shop Floor Bin for Finished Products: **PROD_FIN**.

Edit - Production Order - PO000001 - 520000001 - Sofa Persephone

Manage Finish Close Job Card... Release Prod. Order Archive Order Check Availability Update Unit Cost Item Tracking Lines Inventory Profile

General

No. PO000001 Status Finished

Document Type Order

Item No. 520000001 Quantity to Produce 2

Item Description Sofa Persephone Outstanding Quantity (Base) 0

Item Description 2 -- Quantity Finished 2

Schedule

Availability Date 9/6/2020

Start Week 36

Start Date 9/6/2020

End Date 9/6/2020

Update Status to

Posting Date

In this scenario we do not ship the Sofas immediately to the Customer, so they need to be stored on Pallets in the Warehouse first. These Pallets are equivalent to a Bin. To do so we retrieve the contents from the Shop Floor Bin in a Movement Worksheet from where we create Movement to the Storage part of the Warehouse.

In the **Movement Worksheet** make sure that you choose a Batch with **Location Code GREY**. In this Worksheet we will get the Bin Content by clicking **Process, Get Bin Content....**

Movement Worksheets | Work Date: 06/09/2020

Name DEFAULT

Location Code GREY

Sorting Method

Manage Process Line Item Actions Related Fewer options

Create Movement... Autofill Qty. to Handle Delete Qty. to Handle Calculate Bin Replenishment... Get Bin Content... Warehouse Entries

Item No.	Description	Description 2	From Zone Code	From Bin Code	To Zone Code	To Bin Code	Quantity	Outstanding	Qty. to Handle	Qty. Handled	Due Date	Unit of Measure
							0	0	0	0		

Whse. Get Bin Content

Options

Posting Date

Document No.

Filter: Bin Content

× Location Code GREY

× Zone Code PROD

× Bin Code PROD FIN

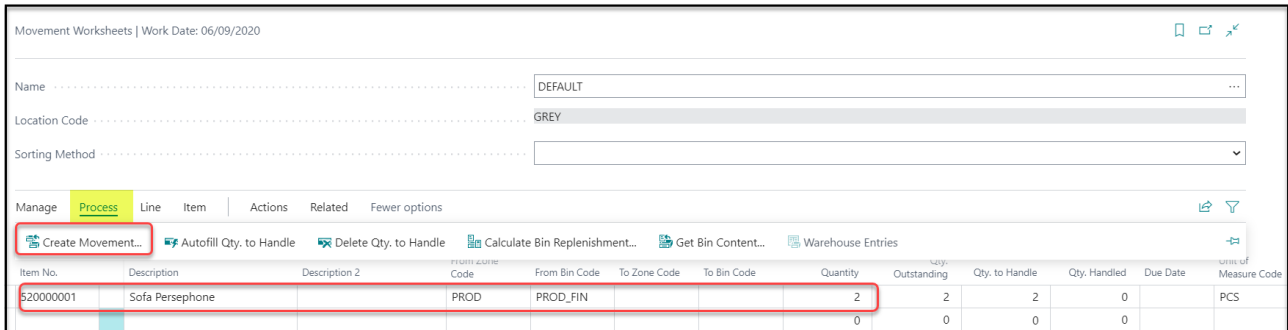
× Item No.

× Variant Code

× Unit of Measure Code

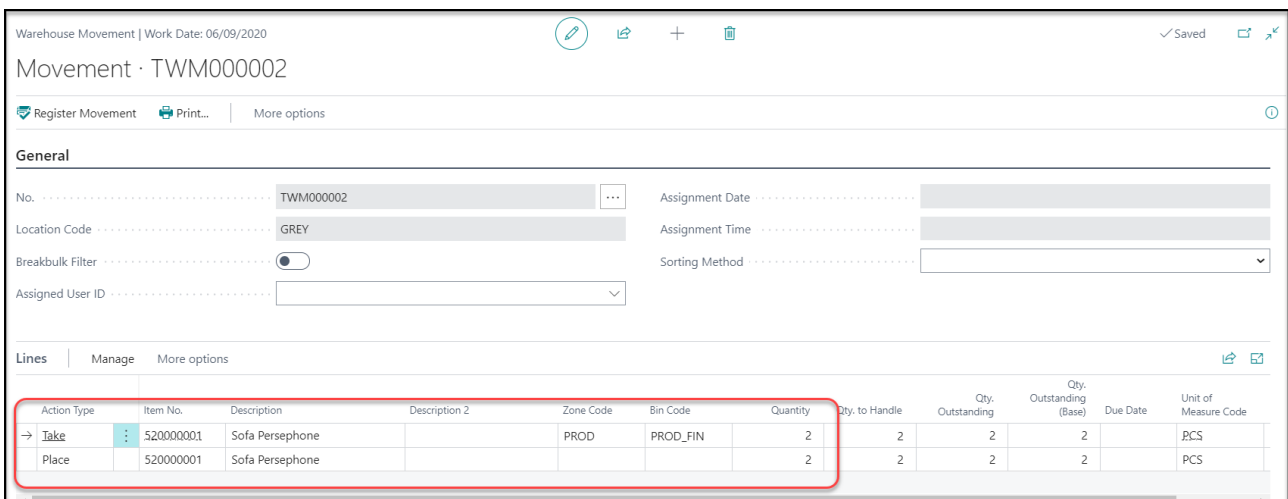
Schedule... OK Cancel

We want to get the Output Bin Content from the Shop Floor. Therefore, the **Bin Code** in the Request Page is **PROD_FIN**. Then click **OK** and the Movement Worksheet shows the two Sofas waiting to be moved. To do so we create the Movement by clicking **Process,> Create Movement....**



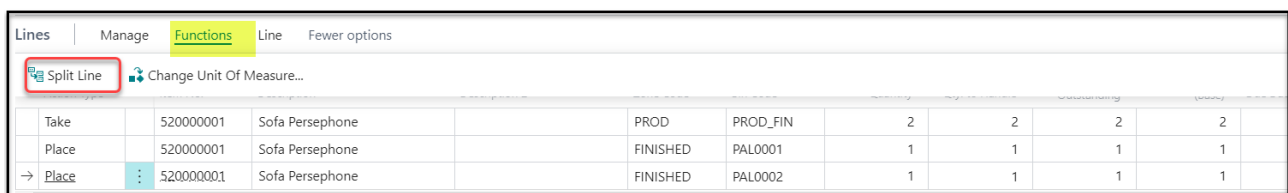
Item No.	Description	Description 2	From Bin Code	To Zone Code	To Bin Code	Quantity	Qty. Outstanding	Qty. to Handle	Qty. Handled	Due Date	Unit of Measure Code
520000001	Sofa Persephone		PROD	PROD_FIN		2	2	2	0		PCS
						0	0	0	0		

After doing so, a message pops up, that a **Movement** has been created. Please confirm by clicking **OK**. Let us have a look at the new Movement. We see a **Take Action** for two Sofas from the Production Zone. Where we should place it, is still to be decided.



Action Type	Item No.	Description	Description 2	Zone Code	Bin Code	Quantity	Qty. to Handle	Qty. Outstanding	Qty. Outstanding (Base)	Due Date	Unit of Measure Code
Take	520000001	Sofa Persephone		PROD	PROD_FIN	2	2	2	2		PCS
Place	520000001	Sofa Persephone				2	2	2	2		PCS

In this scenario we want to **Place** the Sofas on Pallets that each have its unique **Bin Code**. To do so we enter the Storage Zone for the Pallets, and we search for an appropriate empty Pallet: **PAL0001**. On a Pallet there is only space for one Sofa. So, we enter **1** in the **Qty. to Handle** and then use the **Split Line** Function to create a second Line in which we enter the second Pallet **PAL0002**. For splitting the line click **Functions, Split Line**.



Action Type	Item No.	Description	Description 2	Zone Code	Bin Code	Quantity	Qty. to Handle	Qty. Outstanding	Qty. Outstanding (Base)	Due Date	Unit of Measure Code
Take	520000001	Sofa Persephone		PROD	PROD_FIN	2	2	2	2		PCS
Place	520000001	Sofa Persephone		FINISHED	PAL0001	1	1	1	1		PCS
Place	520000001	Sofa Persephone		FINISHED	PAL0002	1	1	1	1		PCS

Now we can Register the Movement and the two sofas are stored in the warehouse on the Pallets. They are now ready to be picked for the Sales Order. Because the Sofas have a unique number the system will direct

to the appropriate Bins (Pallets) to fulfill this Sales Order. Below you see this in the appropriate Warehouse Shipment and the Warehouse Pick. The process for creating these documents is described in more detail in the previous Chapter in paragraph [Directed Pick and Shipment](#).

Warehouse Shipment | Work Date: 06/09/2020

+

✓ Saved

TSH000004

Process
Print/Send
Release
Posting
Shipment
Navigate
Actions
Related
Fewer options

General

No. TSH000004 ...

Assigned User ID

Location Code GREY ...

Assignment Date

Zone Code SHIPMENT ...

Assignment Time

Bin Code SHIP_FP ...

Sorting Method

Document Status

Pick Document No.

Status Open ...

Container No.

Posting Date 06/09/2020

Lines
Manage
More options

Exp... Mat...	Type	Source Document	Source No.	Item No.	Description	Description 2	Quantity	Qty. to Ship	Complete Shipment of Line	Qty. Shipped	Qty. Outstanding	Due Date
→	Item	Sales Order	SWO01	520000001	Sofa Persephone		2	0	No	0	2	23/01/20

Edit - Warehouse Pick - Pick · TPI000004

Manage
Process
Print/Send
Pick
Navigate
Actions
Related
Fewer options

General

No. TPI000004 ...

Assignment Date

Location Code GREY ...

Assignment Time

Breakbulk Filter ☒

Sorting Method

Assigned User ID

Lines
Manage
More options

Source Document	Source No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Qty. Outstanding	Due Date	Unit of Measure Code	Qty. per Unit of Measure	D Ty
Sales Order	SWO01	520000001	Sofa Persephone		PAL0002	1	1	0	1	23/01/2020	PCS	1	C
Sales Order	SWO01	520000001	Sofa Persephone		SHIP_FP	1	1	0	1	23/01/2020	PCS	1	C
Sales Order	SWO01	520000001	Sofa Persephone		PAL0001	1	1	0	1	23/01/2020	PCS	1	C
Sales Order	SWO01	520000001	Sofa Persephone		SHIP_FP	1	1	0	1	23/01/2020	PCS	1	C

TRIMIT PRODUCTION COLLECTING ORDER AND BC WAREHOUSING

In this chapter, we will discuss the integration of **TRIMIT Production Collecting Order** with the BC Warehousing Features. The Production Collecting Order is the sum of all underlying Production Orders. This means that the Warehouse Document will show the sum of all Warehouse Activities of the underlying Production Orders.

For this scenario, the database has a **Production Collecting Order PCOB0002** with **Master 2200 (Grace Bomber)**. The **Production Collecting Order** has been *Released* and the **Related Orders** have been created. Notice that the **Location Codes** for **Output** and **Consumption** are both **BLACK**.

Production Collecting Order | Work Date: 06/09/2020

PCOB0002

Generate based on Sales Lines | Release | Finish | Close Order | Set Qty. to Finish = Outstanding Qty. | **Actions** | Related | Fewer options

User Defined | Manage | Create Transfer Orders | Functions | **Warehouse** | Check Material Shortage | Create Inventory Put-away/Pick/Movement... | Create Inbound Whse. Request | Create Whse. Pick

Exp... Mat...	Type	No.	Description	on Code emption	Quantity	Quantity to Finish	Finished Quantity	Inbound Qty. to Transfer	Inbound Qty. on Transfer
→	Matrix	2200	Grace Bomber	BLACK	230	0	0	0	0
☐	Item	22000104	Grace Bomber	White,4	10	0	0	0	0
☐	Item	22000106	Grace Bomber	White,6	15	0	0	0	0
☐	Item	22000108	Grace Bomber	White,8	20	0	0	0	0
☐	Item	22000110	Grace Bomber	White,10	25	0	0	0	0
☐	Item	22000112	Grace Bomber	White,12	20	0	0	0	0
☐	Item	22000114	Grace Bomber	White,14	15	0	0	0	0
☐	Item	22000116	Grace Bomber	White,16	10	0	0	0	0
☐	Item	22003004	Grace Bomber	Yellow,4	10	0	0	0	0
☐	Item	22003006	Grace Bomber	Yellow,6	15	0	0	0	0
☐	Item	22003008	Grace Bomber	Yellow,8	20	0	0	0	0
☐	Item	22003010	Grace Bomber	Yellow,10	25	0	0	0	0
☐	Item	22003012	Grace Bomber	Yellow,12	20	0	0	0	0

Let us check whether we have enough Raw Materials on stock to start producing of the Garments. To do so, we check the **Material Shortage** by clicking **Actions, Warehouse, Check Material Shortage**. We can see that all **Shortage Indicators** are on **green**, so that we can start the production.

Shortage List 06-01-2022

Document No.: PCOB0002

Non Handled Items and Items in Progress

Item No	Description	Description2	Location Code	Consumption Qty	Picked Qty	Pick Qty	Outstanding Qty	Available Qty Location	Available Qty All Locations	Shortage Indicator
M200099	Fabric 72 % Polyamide, 28 % Elastane	Black	BLACK	230.00	0.00	0.00	230.00	1,000.00	2,000.00	✓
M200099	Alternative Location that demands Movement		BLUE	Blue Warehouse				1,000.00		
M203001	Jaguar Print 72 % Polyamide, 28 % Elastane	White	BLACK	232.00	0.00	0.00	232.00	1,000.00	1,000.00	✓
M203030	Jaguar Print 72 % Polyamide, 28 % Elastane	Yellow	BLACK	232.00	0.00	0.00	232.00	1,000.00	1,000.00	✓
M210020	Thread 100% Cotton	Black	BLACK	1,150.00	0.00	0.00	1,150.00	5,000.00	6,000.00	✓
M210020	Alternative Location that demands Movement		BLUE	Blue Warehouse				1,000.00		
M230020012	Zipper 10 - 100 cm	Black,12 cm	BLACK	180.00	0.00	0.00	180.00	500.00	500.00	✓
M230020014	Zipper 10 - 100 cm	Black,14 cm	BLACK	280.00	0.00	0.00	280.00	750.00	800.00	✓
M230020014	Alternative Location that demands Movement		BLUE	Blue Warehouse				50.00		
M230020060	Zipper 10 - 100 cm	Black,60 cm	BLACK	90.00	0.00	0.00	90.00	400.00	400.00	✓
M230020070	Zipper 10 - 100 cm	Black,70 cm	BLACK	90.00	0.00	0.00	90.00	400.00	400.00	✓
M230020080	Zipper 10 - 100 cm	Black,80 cm	BLACK	50.00	0.00	0.00	50.00	250.00	250.00	✓

NOTE

The **Check Material Shortage** report on a **Production Collecting Order** shows all the required components totalized over all the underlying **Related Production Orders**.

Depending on the fact if a Location has **Inventory Pick/Put-away (ORANGE)**, Basic **Warehousing (GREEN)** or **Advanced Warehousing (BLACK, GREY)** there is a different procedure to follow. These are all described in the previous chapters and paragraphs. We will only discuss one of the methods to show that these documents are the sum of the Documents on Related Orders, such as the **Check Material Shortage** Report.

This Production Collecting Order is on **Location Code BLACK**, which means that we need to create a **Warehouse Pick** for this Production Collecting Order. In this scenario it is complicated because the appropriate Production Bins must be on the Production Order Lines depending on the Warehouse Class Codes as shown in one of the underlying Production Orders of this Production Collecting Order:

- Fabric Rolls have **Warehouse Class Code ROLL** and need to be placed on **Bin Code PROD_TO_ROLL** that has the same Warehouse Class Code
- Zippers and Thread have **Warehouse Class Code RM**. So, they need to be placed on the **Bin Code PROD_TO_RM** which has the same Warehouse Class Code.

Edit - Production Order - PO000003 - 22000104 - Grace Bomber											
Manage Finish Job Card... Release Prod. Order Archive Order Check Availability Update Unit Cost Item Tracking Lines Inventory Profile Actions											
General >											
Order 22000104 Released											
Lines Manage Line VarDim Related Order No. Functions Fewer options											
Position 1	Part Item No.	Type	No.	Description	Description 2	Bin Code	Quantity per	Unit of Measure Code	Measurement 1	Measurement 2	Co
→	MAIN	Item	M203001	Jaguar Print 72 % Polyamide, 2...	White	PROD_TO_RO...	1.4	M	0	0	
	BAND	Item	M200099	Fabric 72 % Polyamide, 28 % EL...	Black	PROD_TO_RO...	0.7	M	0	0	
	POCKET	Item	M200099	Fabric 72 % Polyamide, 28 % EL...	Black	PROD_TO_RO...	0.3	M	0	0	
FRONT	MAIN	Item	M230020060	Zipper 10 - 100 cm	Black,60 cm	PROD_TO_RM	1	PCS	0	0	
POCKETS	POCKET	Item	M230020012	Zipper 10 - 100 cm	Black,12 cm	PROD_TO_RM	2	PCS	0	0	
		Item	M210020	Thread 100% Cotton	Black	PROD_TO_RM	5	M	0	0	
		Setup	O300010	Setup for Cutting Machine			5	MIN	0	0	
		Operation	300010	Cut			3	MIN	0	0	

In case you do not work with Raw Materials with different Warehouse Class Codes, then entering the appropriate **Bin Code Output** on the Production Collecting Order header should suffice. Do not forget to enter the appropriate **Bin Code Output** considering the **Warehouse Class Code** of the Finished Product when necessary.

Production Collecting Order Work Date: 06/09/2020																																																											
PCOB0002																																																											
Generate based on Sales Lines Release Finish Close Order Set Qty. to Finish = Outstanding Qty. Actions Related Fewer options																																																											
User Defined Manage Create Transfer Orders Functions Warehouse																																																											
<table border="1"> <tr> <td>☐</td> <td>Grace Bomber</td> <td>Yellow,10</td> <td>Check Material Shortage</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>PO000013</td> <td>Yes</td> <td>N</td> </tr> <tr> <td>☐</td> <td>Grace Bomber</td> <td>Yellow,12</td> <td>Create Inventory Put-away/Pick/Movement...</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>PO000015</td> <td>Yes</td> <td>N</td> </tr> <tr> <td>☐</td> <td>Grace Bomber</td> <td>Yellow,14</td> <td>Create Inbound Whse. Request</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>PO000016</td> <td>Yes</td> <td>N</td> </tr> <tr> <td>☐</td> <td>Grace Bomber</td> <td>Yellow,16</td> <td>Create Whse. Pick</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>												☐	Grace Bomber	Yellow,10	Check Material Shortage	0	0	0	0	0	PO000013	Yes	N	☐	Grace Bomber	Yellow,12	Create Inventory Put-away/Pick/Movement...	0	0	0	0	0	PO000015	Yes	N	☐	Grace Bomber	Yellow,14	Create Inbound Whse. Request	0	0	0	0	0	PO000016	Yes	N	☐	Grace Bomber	Yellow,16	Create Whse. Pick								
☐	Grace Bomber	Yellow,10	Check Material Shortage	0	0	0	0	0	PO000013	Yes	N																																																
☐	Grace Bomber	Yellow,12	Create Inventory Put-away/Pick/Movement...	0	0	0	0	0	PO000015	Yes	N																																																
☐	Grace Bomber	Yellow,14	Create Inbound Whse. Request	0	0	0	0	0	PO000016	Yes	N																																																
☐	Grace Bomber	Yellow,16	Create Whse. Pick																																																								
Location Management																																																											
Output Location Code Output: BLACK Bin Code Output: PROD_FIN_RACK Consumption Location Code Consumption: BLACK Bin Code Consumption: Transfer Order Inbound Shipment Date from Production: Receipt Date from Production: Inbound Transfer-from Code: BLACK Inbound Transfer-to Code: Inbound In-Transit Code:																																																											

If all the Bins are set appropriately, we can create a **Warehouse Pick** for the whole Production Collecting Order by clicking **Actions, Warehouse, Create Whse. Pick**.

In this **Warehouse Pick** we see all the **Take** and **Place Actions** for all Raw Materials to the Production Zone. After **Registering** these Raw Materials are available on the Shop floor according to the system from which they can be consumed. (For Registering click **Process, Register Pick.**) The Warehouse Pick disappears from the list.

Edit - Warehouse Pick - Pick · TPI000005

Manage **Process** Print/Send Pick Navigate Actions Related Fewer options

Register Pick

Lines Manage More options

Source Document	Source No.	Item No.	Description	Description 2	Bin Code	Quantity	Qty. to Handle	Qty. Handled	Qty. Outstanding	Due Date	Unit of Measure Code	Qty. per Unit Measure
→ Prod. Cons...	PO000003	M203001	Jaguar Print 72 % Polyamide, 2...	White	RR002	14	14	0	14	06/09/2020	M	
Prod. Cons...	PO000003	M203001	Jaguar Print 72 % Polyamide, 2...	White	PROD_TO_ROLL	14	14	0	14	06/09/2020	M	
Prod. Cons...	PO000003	M200099	Fabric 72 % Polyamide, 28 % El...	Black	RR001	7	7	0	7	06/09/2020	M	
Prod. Cons...	PO000003	M200099	Fabric 72 % Polyamide, 28 % El...	Black	PROD_TO_ROLL	7	7	0	7	06/09/2020	M	
Prod. Cons...	PO000003	M200099	Fabric 72 % Polyamide, 28 % El...	Black	RR001	3	3	0	3	06/09/2020	M	
Prod. Cons...	PO000003	M200099	Fabric 72 % Polyamide, 28 % El...	Black	PROD_TO_ROLL	3	3	0	3	06/09/2020	M	
Prod. Cons...	PO000003	M23002060	Zipper 10 - 100 cm	Black,60 cm	RM002	10	10	0	10	06/09/2020	PCS	
Prod. Cons...	PO000003	M23002060	Zipper 10 - 100 cm	Black,60 cm	PROD_TO_RM	10	10	0	10	06/09/2020	PCS	
Prod. Cons...	PO000003	M23002012	Zipper 10 - 100 cm	Black,12 cm	RM006	20	20	0	20	06/09/2020	PCS	
Prod. Cons...	PO000003	M23002012	Zipper 10 - 100 cm	Black,12 cm	PROD_TO_RM	20	20	0	20	06/09/2020	PCS	
Prod. Cons...	PO000003	M210020	Thread 100% Cotton	Black	RM001	50	50	0	50	06/09/2020	M	
Prod. Cons...	PO000003	M210020	Thread 100% Cotton	Black	PROD_TO_RM	50	50	0	50	06/09/2020	M	

NOTE

The Warehouse Pick does not totalize the Raw Materials but put them into order of the underlying Related Production Orders. That could be useful on the production site. However, you could also argue that you want to totalize the Components on behalf of picking the Raw Materials. Currently that requires customization. One tip that might help: by sorting on Item No., you can have at least all the identical Items grouped together on the Lines.

The Raw Materials can now be consumed. This can be done for instance by clicking **Related, Posting, Direct Posting of Consumption** and then select one of the sorting options. The Raw Materials are then **posted** from the Shop Floor Bin Codes **PROD_TO_ROLL** and **PROD_TO_RM**.

Production Collecting Order | Work Date: 06/09/2020

PCOB0002

Generate based on Sales Lines Release Finish Close Order Set Qty. to Finish = Outstanding Qty. Actions **Related** Fewer options

Order Outbound Transfer Orders Inbound Transfer Orders **Posting** Warehouse

Direct Posting of Consumption Material by Material No.

Posting of Consumption by Finishing Material by Master

Material by Matrix

Material by VarDim Y-Axis

Material by VarDim Y-Axis Line No.

Operations by Operation No.

Operations by Master

Operations by Matrix

Operations by VarDim Y-Axis

Operations by VarDim Y-Axis Line No.

Exp... Mat...	Description	Description 2	Location Code Output	Location Code Consumption	Quantity	Inbound Qty. on Transfer	Related Order No.	Releas...	Finis
☒	Grace Bomber		BLACK	BLACK	230	0	0	Yes	h
☐	Grace Bomber	White,4	BLACK	BLACK	10	0	0	PO000003	Yes
☐	Grace Bomber	White,6	BLACK	BLACK	15	0	0	PO000004	Yes
☐	Grace Bomber	White,8	BLACK	BLACK	20	0	0	PO000005	Yes
☐	Grace Bomber	White,10	BLACK	BLACK	25	0	0	PO000006	Yes
☐	Grace Bomber	White,12	BLACK	BLACK	20	0	0	PO000007	Yes
☐	Grace Bomber	White,14	BLACK	BLACK	15	0	0	PO000008	Yes
☐	Grace Bomber	White,16	BLACK	BLACK	10	0	0	PO000009	Yes
☐	Grace Bomber	Yellow,4	BLACK	BLACK	10	0	0	PO000010	Yes
☐	Grace Bomber	Yellow,6	BLACK	BLACK	15	0	0	PO000011	Yes
☐	Grace Bomber	Yellow,8	BLACK	BLACK	20	0	0	PO000012	Yes
☐	Grace Bomber	Yellow,10	BLACK	BLACK	25	0	0	PO000013	Yes
☐	Grace Bomber	Yellow,12	BLACK	BLACK	20	0	0	PO000014	Yes
☐	Grace Bomber	Yellow,14	BLACK	BLACK	15	0	0	PO000015	Yes

Item	Description	Color	Quantity	Quantity to Finish	Quantity to Post	Quantity to Post	Quantity to Post	Quantity to Post	Quantity to Post	Quantity to Post	Quantity to Post
M203001	Jaguar Print 72 % Polyamide, 28 ...	White	0	232	232	232	232	232	232	232	232
M200099	Fabric 72 % Polyamide, 28 % Elast...	Black	0	230	230	230	230	230	230	230	230
M230020060	Zipper 10 - 100 cm	Black,60 cm	0	90	90	90	90	90	90	90	90
M230020012	Zipper 10 - 100 cm	Black,12 cm	0	180	180	180	180	180	180	180	180
M210020	Thread 100% Cotton	Black	0	1,150	1,150	1,150	1,150	1,150	1,150	1,150	1,150
M230020070	Zipper 10 - 100 cm	Black,70 cm	0	90	90	90	90	90	90	90	90
M230020014	Zipper 10 - 100 cm	Black,14 cm	0	280	280	280	280	280	280	280	280
M230020080	Zipper 10 - 100 cm	Black,80 cm	0	50	50	50	50	50	50	50	50
M203030	Jaguar Print 72 % Polyamide, 28 ...	Yellow	0	232	232	232	232	232	232	232	232

Let us finish some of the **Production Collecting Order Lines** by entering some quantities in the column **Quantity to Finish**. An example is shown in the screenshot below in which we want to **post** some quantities of the Garments with **Color Variant White**. After entering click on **Finish**.

Exp... Mat...	No.	Description	Description 2	Location Code Output	Location Code Consumption	Quantity	Quantity to Finish	Finished Quantity	Inbound Qty. to Transfer	Int c
☒	2200	Grace Bomber		BLACK	BLACK	230	70	0	0	
☐	22000104	Grace Bomber	White,4	BLACK	BLACK	10	10	0	0	
☐	22000106	Grace Bomber	White,6	BLACK	BLACK	15	10	0	0	
☐	22000108	Grace Bomber	White,8	BLACK	BLACK	20	10	0	0	
☐	22000110	Grace Bomber	White,10	BLACK	BLACK	25	10	0	0	
☐	22000112	Grace Bomber	White,12	BLACK	BLACK	20	10	0	0	
☐	22000114	Grace Bomber	White,14	BLACK	BLACK	15	10	0	0	
☐	22000116	Grace Bomber	White,16	BLACK	BLACK	10	10	0	0	
☐	22003004	Grace Bomber	Yellow,4	BLACK	BLACK	10	0	0	0	
☐	22003006	Grace Bomber	Yellow,6	BLACK	BLACK	15	0	0	0	
☐	22003008	Grace Bomber	Yellow,8	BLACK	BLACK	20	0	0	0	
☐	22003010	Grace Bomber	Yellow,10	BLACK	BLACK	25	0	0	0	

After posting the Quantities, the Finished Product is now stored on Shop Floor **Bin Code PROD_FIN_RACK**. Now we want to move them from the Shop Floor to the storage part of the warehouse. Therefore, we go into a **Movement Worksheet** and fill that via the Function **Get Bin Content** (click **Process, Get Bin Content...**). After this we create the **Movement** by clicking **Process, Create Movement...**

Movement Worksheets | Work Date: 06/09/2020

Name

DEFAULT

Location Code

BLACK

Sorting Method

Item

Manage

Process

Line

Item

Actions

Related

Fewer options

Create Movement...

Autofill Qty. to Handle

Delete Qty. to Handle

Calculate Bin Replenishment...

Get Bin Content...

Warehouse Entries

Item No.	Description	Description 2	From Bin Code	To Zone Code	To Bin Code	Quantity	Outstanding	Qty. to Handle	Qty. Handled	Due Date	Units of Measure Code
22000104	Grace Bomber	White,4	PROD	PROD_FIN_R...		10	10	10	0		PCS
22000106	Grace Bomber	White,6	PROD	PROD_FIN_R...		10	10	10	0		PCS
22000108	Grace Bomber	White,8	PROD	PROD_FIN_R...		10	10	10	0		PCS
22000110	Grace Bomber	White,10	PROD	PROD_FIN_R...		10	10	10	0		PCS
22000112	Grace Bomber	White,12	PROD	PROD_FIN_R...		10	10	10	0		PCS
22000114	Grace Bomber	White,14	PROD	PROD_FIN_R...		10	10	10	0		PCS
22000116	Grace Bomber	White,16	PROD	PROD_FIN_R...		10	10	10	0		PCS
						-	-	-	-		

We can see the created **Movement** in the screenshot below. Notice that the **Take Lines** have the **Bin Code** **PROD_FIN_RACK**. The **Place Lines** are still empty in this scenario. They need to be entered by the Warehouse Employee that places them in a storage Bin chosen by him in this case. After doing so, the Movement can be registered and may now be ready for Shipment or other activities that you want to do in the warehouse.

Warehouse Movement | Work Date: 06/09/2020





✓ Saved

Movement · TWM000003

 Register Movement
  Print...
 More options

General >

Lines

Manage

Functions

Line

Fewer options

Action Type	Item No.	Description	Description 2	Zone Code	Bin Code	Quantity	Qty. to Handle	Qty. Outstanding	Qty. Outstanding (Base)	Due Date	Unit of Measure Code
→ Take	22000104	Grace Bomber	White,4	PROD	PROD_FIN_R...	10	10	10	10		PCS
Place	22000104	Grace Bomber	White,4			10	10	10	10		PCS
Take	22000106	Grace Bomber	White,6	PROD	PROD_FIN_R...	10	10	10	10		PCS
Place	22000106	Grace Bomber	White,6			10	10	10	10		PCS
Take	22000108	Grace Bomber	White,8	PROD	PROD_FIN_R...	10	10	10	10		PCS
Place	22000108	Grace Bomber	White,8			10	10	10	10		PCS
Take	22000110	Grace Bomber	White,10	PROD	PROD_FIN_R...	10	10	10	10		PCS
Place	22000110	Grace Bomber	White,10			10	10	10	10		PCS
Take	22000112	Grace Bomber	White,12	PROD	PROD_FIN_R...	10	10	10	10		PCS
Place	22000112	Grace Bomber	White,12			10	10	10	10		PCS
Take	22000114	Grace Bomber	White,14	PROD	PROD_FIN_R...	10	10	10	10		PCS
Place	22000114	Grace Bomber	White,14			10	10	10	10		PCS
Take	22000116	Grace Bomber	White,16	PROD	PROD_FIN_R...	10	10	10	10		PCS
Place	22000116	Grace Bomber	White,16			10	10	10	10		PCS

CONCLUSION

In this White Paper, several scenarios have been described regarding the integrated interface between TRIMIT Functionality and standard BC Warehousing.

The TRIMIT Functionality are:

- TRIMIT Production:
 - Material Shortage Check
 - TRIMIT Production Order
 - TRIMIT Production Collecting Order
 - TRIMIT Related Order
- TRIMIT Container Management
- TRIMIT Pick Document

The BC Warehousing levels are:

- Basic Warehousing:
 - Inventory Pick
 - Inventory Put-away
- Standard BC Warehousing:
 - Warehouse Receipt & Warehouse Put-away
 - Warehouse Shipment & Warehouse Pick
- Advanced BC Warehousing:
 - Bin Management & Bin Replenishment
 - Directed Put-away

BC Warehousing comes with its gaps. It has not been our purpose to solve those existing gaps. Our main goal has been to make an integration between BC Warehousing and TRIMIT Functionality. While creating this integration we have defined some gaps and they are put in our Idea Catalogue for releases to come. However, your input would be very valuable, if you come across an issue that you could define as a gap. Please let us know by a mail to our Service Desk: partnersupport@trimit.com. Alternatively, for a new idea <https://partner.trimit.com/solution/submit-an-idea/>.