epicor

Advanced Material Management User Guide

Version 2025.1

Disclaimer

This document is for informational purposes only and is subject to change without notice. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. However, Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. As each user of Epicor software is likely to be unique in their requirements in the use of such software and their business processes, users of this document are always advised to discuss the content of this document with their Epicor account manager. All information contained herein is subject to change without notice and changes to this document since printing and other important information about the software product are made or published in release notes, and you are urged to obtain the current release notes for the software product. We welcome user comments and reserve the right to revise this publication and/or make improvements or changes to the products or programs described in this publication at any time, without notice.

The usage of any Epicor software shall be pursuant to an Epicor end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to Epicor's standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Where any software is expressed to be compliant with local laws or requirements in this document, such compliance is not a warranty and is based solely on Epicor's current understanding of such laws and requirements. All laws and requirements are subject to varying interpretations as well as to change and accordingly Epicor cannot guarantee that the software will be compliant and up to date with such changes. All statements of platform and product compatibility in this document shall be considered individually in relation to the products referred to in the relevant statement, i.e., where any Epicor software is stated to be compatible with one product and also stated to be compatible with another product, it should not be interpreted that such Epicor software is compatible with both of the products running at the same time on the same platform or environment. Additionally platform or product compatibility may require the application of Epicor or third-party updates, patches and/or service packs and Epicor has no responsibility for compatibility issues which may be caused by updates, patches and/or service packs released by third parties after the date of publication of this document.

Epicor® is a registered trademark and/or trademark of Epicor Software Corporation in the United States, certain other countries and/or the EU. All other trademarks mentioned are the property of their respective owners.

Table of Contents

Advanced Material Management

'Advanced Material Management' (AMM) enables manufacturers to produce electronic requests for materials, dispatch those materials, and track inventory movements of all inventory including raw materials and work in process.

This guide will take you through the main 'AMM' apps and features.

Setup

This section of the user guide reviews common company configuration factors and master file factors applicable to the 'Advanced Material Management' (AMM) module.

Setting Up Site

Use the 'Advanced Material Management' (AMM) card to define advanced inventory parameters you use within the current 'Site' configuration.

> ℹ️ To view/modify the 'AMM' cards you must instal the 'Advanced Material Management' license.

These parameters include:

- Setup values for Automated Fulfillment relevant to the site you are working in.

- Defining how the Fulfillment Workbench sorts sales orders, jobs, and transfer orders in search results, and the default priority code assigned to generated replenishment move requests that appear in the Replenishment Workbench > Moves card.

- Determines if a sales order is required be marked as Ready to Fulfill in order for it to appear in the search results for order fulfillment in the Fulfillment Workbench app.

- Defining several Material Queue default values and indicate how warehouses linked to this site configuration replenish their material supply levels. Many of these defaults can be overridden when processing allocations in the Fulfillment Workbench, processing replenishment move requests in the Replenishment Workbench, or defining allocation templates in Allocation Template Maintenance.

In Kinetic, you can automate sales order, transfer order, and job fulfillment by creating rules. Once you run the 'Automated Fulfillment Process' app those rules will affect how the sales order releases, job, or transfers will be allocated.

> ℹ️ To learn more about how to set up automatic fulfillment in Kinetic, review the Setting Up Automated Fulfillment article and its related articles.

1. Expand the **Automated Fulfillment** card.

2. Select a default template for job, order, or transfer order fulfillment.

Default Allocation Templates

Job Template ⌄	Sales Order Template ⌄	Transfer Order Template ⌄

> ℹ You create allocation templates using the 'Allocation Template Maintenance' app. To learn how to create templates, review the Creating Allocation Templates article.

3. Select the **Enable Sales Orders** check box for sales orders, jobs, or transfer orders.

Fulfillment Queue

☐ Enable Jobs	☐ Enable Sales Orders	☐ Enable Transfer Orders
Send to Queue ⌄	Send to Queue ⌄	Send to Queue ⌄

> ℹ Selecting this check box activates the **Send to Queue** field.

> ℹ If you select this check box, but don't define the 'Send To Queue' option (leave it blank), then you can push sales order release(s), job material(s), or transfer order line(s) to the fulfillment queue. For example, assume you enter a sale order for '10' units of part 'DCD-100-SP'. If you select the 'Enable Sales Orders' check box, then:
>
> 1. Enter a sales order and define its line(s) and release(s).
>
>   To learn how to create a sales order, review theCreating Sales Orders article.
>
> 2. On your order, select the **Release Detail** node in the Nav tree.
>
>   The Detail card displays.
>
> 3. Select **Fulfillment Queue Actions** button for your sales order release.
>
>   **Fulfillment Queue Actions**
>
>   **Status**
>
>   ☑ Open Release

> ℹ The 'Fulfillment Queue Actions' panel displays.
>
> **Fulfillment Queue Actions** ✕
>
> ∧
>
> Queue Action ⌄
>
>   4. Inside the panel, select **Send to fulfillment queue** in the Queue Action field.
>
>   5. Select **OK**.

4. In the Send to Queue field, select **Ready to Fulfill**.

    A sales order release, job material, and transfer order line will go to the queue the moment you set it to 'Ready to Fulfill'.

> ℹ For example, assume you enter a sale order for '10' units of part 'DCD-100-SP'. If you select the 'Enable Sales Orders' check box and then select the 'Ready to Fulfill' option then Kinetic will send the sales order release to the fulfillment queue the moment you set it to 'Ready To Fulfill'.
>
>   1. Enter a sales order and define its line(s) and release(s).
>
>   2. On your order, select the **Release Detail** node in the Nav tree.
>
>   The Detail card displays.
>
>   3. Select the **Ready To Fulfill** check box.
>
>   **Options**
>   ☑ Firm Release
>   ☑ Ready To Fulfill
>
>   4. Select **Save**. 💾

> **ℹ** The Fulfillment Queue group box displays the **In Queue** status.
>
> **Status**
>
> ☑ Open Release
>
> **Quantities**
>
> | On Hand 198 | EA ⌄ |
> | Available 98 | EA ⌄ |
> | This Line 5 | EA ⌄ |
> | Shipped 0.00 | EA ⌄ |
> | Allocated 0 | EA ⌄ |
>
> **Fulfillment Queue**
>
> In Queue

5. Select **Save**. 💾

> **ℹ** To learn about the concept of 'Automated Fulfillment', review the article.

In the Fulfillment Workbench card, define the settings for the Fulfillment Workbench including how it sorts sales orders, jobs, and transfer orders in search results, default priority codes for replenishment move requests, and if sales order releases need to be marked as Ready to Fulfill to load.

1. In the **AMM > Fulfillment Workbench** card, select the drop-down lists in the Fulfillment Workbench Defaults section box to define how quantity search results sort for sales orders, jobs, and transfer orders. You select these default search options respectively on the **SO Inventory Search Sort**, **Job Inventory Search Sort**, and **Xfer Inventory Search Sort** drop-down lists. Available options:

   - FIFO - Sorts results in order by First In, First Out records.

   - LIFO - Sorts results in order by Last In, Last Out records.

   - Bin Ascending - Sorts results by bin in ascending order.

   - Bin Descending - Sorts results by bin in descending order.

   - Quantity Ascending - Sorts results by quantity in ascending order.

   - Quantity Descending - Sorts results by quantity in descending order.

   You can override these default values by defining alternate options for allocation templates you create in Allocation Template Maintenance; you then select these templates in the

Fulfillment Workbench. You can also directly override these search defaults when you process allocations in the Fulfillment Workbench.

2. Select the **Default Net Weight UOM** drop-down list to select the unit of measure used to calculate weight values (for example, Kilograms, Pounds) that display in the Selected Weight field in the Fulfillment Workbench. The options available from the Weight UOM Class display on this drop-down list.

3. Now select the **Default Net Volume UOM** drop-down list to select the unit of measure used to calculate volumes (for example, Cubic Centimeters, Cubic Inches) that display in the Selected Volume field in the Fulfillment Workbench. The options available from the Volume UOM Class display on this list.

> ℹ️ You enter units of measure and units of measure classes in UOM Maintenance and UOM Class Maintenance. For more information on these setup programs, review the Part Parameters chapter, or review the Unit of Measure topics in the application help.

4. Select the **Require Ready to Fulfill** check box to determine if the Ready to Fulfill check box on the header card of sales order needs to be selected to load a sales order release into the Fulfillment Workbench at the site level. If this check box is selected, only those releases whose sales order with the Ready to Fulfill check box selected can load into the Fulfillment Workbench. If this check box remains unselected, the applicaiton does not take into consideration the Ready to Fulfill check box on a sales order. -

> ℹ️ Note: Allocations made in a manner outside of the Fulfillment Workbench, such as through the creation of a customer shipment, will allocate for the order release without taking this flag into consideration.

Fulfillment Workbench

Fulfillment Workbench Defaults

| Sales Order Inventory Search Sort | | Default Net Weight UOM |
| Quantity Ascending | | |

| Job Inventory Search Sort | | Default Net Volume UOM |
| Quantity Ascending | | |

| Transfer Order Inventory Search Sort | | ☐ Require Ready to Fulfill |
| Quantity Ascending | | ☑ Allow Allocation of PCID Inventory |

Define the parameters to be used by the Material Queue including the priority levels for pick, putaway, and replenishment priority levels, and the action to be taken against a sales order with a pick transactions.

1. In the **Fulfillment Workbench** card, select the priority level for pick transactions in the Material Queue. When pick transactions are inserted from the Fulfillment Workbench into this queue, they use this priority level. These priority levels rank transactions by importance, suggesting the order in which users should process these transactions. The available priority levels are 1-9; 1 has the highest priority, while 9 has the lowest priority. The default priority level, if the fields is left blank, is 9.

2. Next, use the **Putaway Transaction Priority** drop-down list to define the priority level for putaway transactions in the Material Queue. When putaway transactions are inserted from the Fulfillment Workbench into this queue, they use this priority level. The available options are 1-9; 1 indicates the highest priority level and 9 indicates the lowest priority level. The default priority level assigned, if left blank, is 9.

   This setting applies to the following inventory transaction types:

   - ASM-STK - Return Assembly / Material Request on an Issued Subassembly
   - INS-STK - Inspection Processing (Production Management/Quality Assurance) Request Move for Passed Inventory
   - MFG-STK - End Activity on Last Operation of a Make to Stock Job with Request Move
   - MTL-STK - Return Assembly Material Request (Material Management / Shipping and Receiving / Advanced Material Management)
   - PLT-STK - Receive Transfer Order (Material Management / Shipping and Receiving)
   - PUR-STK - PO Receipt to Stock / Miscellaneous Receipt to Stock
   - SVG-STK - Return Salvage Request / Job Material Salvage (Material Management / Shipping and Receiving / Advanced Material Management)
   - UKN-STK - Return Miscellaneous Request (Material Management / Shipping and Receiving / Advanced Material Management)

3. From the **Replenish Bin To Bin Priority** drop-down list, select the priority level for bin-to-bin replenishment transactions. These transactions display on the Replenishment Workbench in the Move card. The available options are 1-9. If you do not select a value from this drop-down list, the default priority level assigned to these transactions is 9 (least priority).

4. Select the **Lock Orders On Pick** check box to prevent users from modifying sales order lines after a pick transaction is placed against the line. These users can then pick material quantities for the entire sales order.

   > ℹ️ Example: The Lock Order on Pick check box is selected. User A runs a transaction that requires a pick transaction for part 3498 on sales order 123, line 1. There are four other detail lines on sales order 123. Because User A has run a pick against SO 123, the other lines are not accessible by User B or User C. Only User A can pick part quantities for sales order 123.

5. Select the **Sort Queue by Priority** check box to cause the Material Queue to sort transactions in the following order:

- Priority
- Bin
- Sequence Number

6. In the **Material Queue Rows Per Page** field, specify the total number of rows of returned material queue data (for example, 30) that should display per page on the Material Request Queue and the Material Queue Manager.

7. Use the **Cut off Date - Days After** field, to enter the number of days that should be added to the current system date to calculate a default date displayed in the To Date field in the Material Request Queue and the Material Queue Manager. For example, if you enter 10, and the current system date is 06/15/xx, the default date for the To Date field displays as 06/25/xx (where xx is the current year).

Material Queue

Material Queue Defaults

Pick Transaction Priority
5

Putaway Transaction Priority
5

Replenish Bin To Bin Priority
5

☐ Lock Orders On Pick

☐ Sort Queue By Priority

Display Defaults

Material Queue Rows Per Page
0

Cut off Date - Days After
0

On the **Picking** card, define parameters for picking transactions including, orders to be released for picking, job release inventory reservations, and handheld transaction selection.

1. Select the **Reserve Inventory on Job Release** check box to indicate jobs automatically keep, or reserve, inventory when these records are released.

2. Use the **Unpack to Picked Status** check box to define what occurs when users unpack or delete packing slip lines. If this check box is selected and a line is deleted/unpacked, the inventory used on both Direct Pack and Procedural Pack records is assigned the Picked status. As an allocation record generates, these records are added to picked orders. If this check box is clear and a line is deleted/unpacked, inventory on Direct Pack records is assigned the Available status and the application does not create an allocation record. However if this check box is clear and a line is deleted/unpacked on Procedural Pack records, this inventory is assigned the Picking status. The application generates an allocation record, the Warehouse/Bin becomes the location from which the quantity was picked, and the line is not added to picked orders.

3. Select the **Allow Credit Hold Orders to be Released for Picking** check box so users can pick orders for customers currently on credit hold. These sales orders can then be fulfilled as normal.

4. Select the **Allow partially reserved or allocated SO to be Released for Picking** check box so users can pick partially reserved or allocated sales order releases. When Kinetic determines whether a sales order released can be picked, it ignores the Ship Order Company and Ship Line Complete check boxes.

5. Enter the **Handheld Auto-Select Transactions Max** value to define how many material queue transactions are automatically selected on the Handheld MES interface. This saves time, as users do not need to manually select these transactions on their handheld devices.

Package Control functionality allows you to track, manage, or transact a group of items via a unique identifier, the Package Control ID (PCID). Track any item from receipt into a site, the movement of an item throughout the site, the shipment or transfer of that item to another site, and eventually the shipment of that item to the customer. Also supporting the inbound generation of PCIDs, Kinetic allows you to reserve and allocate PCIDs for sales orders, issue material to jobs, produce PCIDs from jobs, transfer PCIDs from one site to another, and receive PCID finished goods in inventory to complete processing transactions. Perform pick and unpick transactions, shipping transactions, and job receipt to inventory transactions–among others–against a unique PCID

> You have access to the Package Control pane if you have an AMM license. For access to the Advanced Package Control pane you additionally need an Advanced Package Control license.

1. On the Package Control card, select the **Enable Package Control** check box to indicate that Package Control functionality is enabled for the current site. When you select this check box, this enables package control related fields. Clear this check box to disable package control functionality for the current site.

2. Select the **Void when empty** check box to automatically void a PCID when it becomes empty. This field defaults as unselected. It is only enabled if you select the Package Control check box.

3. From the **Consume Returnables** drop-down, select the point during the process that you want to decrement the inventory amount for returnable containers. Returnable containers are those internal parts that you mark as Returnable in Package Code Maintenance which contain the

items associated to the PCID. The available options are Picking, Production of PCID, or Shipping. You want to determine the point of consumption of a container to ensure that the inventory quantity for your containers is accurate.

When you select the **Picking** option, you indicate that you intend to consume a returnable container at the time when you pick a sales order into a PCID. If you select the Production of PCID option, this indicates that you intend to consume the returnable container when you move a PCID into inventory by a program such as Job Receipt to Inventory by PCID, or when you create a PCID in Ad hoc PCID or Repack Reclass. If you select the Shipping option, you indicate that you want to consume the returnable container when you ship the PCID from programs such as Customer Shipment Entry.

4. From the **Consume Expendables** drop-down, select the point during the process that you want to decrement the inventory amount for expendable containers. The expendable containers are those internal parts that you mark as Expendable in Package Code Maintenance. The available options are Picking, Production of PCID, or Shipping. You determine the point of consumption to ensure that the quantity for your containers is accurate.

When you select the **Picking** option, this means you intend to consume an expendable container at the time when you pick on a sales order. If you select the Production of PCID option, this indicates that you intend to consume the expendable container when you move a PCID into inventory by a program such as Job Receipt to Inventory by PCID, or when you create a PCID in Ad hoc PCID or Repack/Reclass. If you select the Shipping option, you indicate that you want to consume the expendable container when you ship the PCID from programs such as Customer Shipment Entry.

5. In the **Maximum Number of PCIDs to Generate** field, enter a numeric value that determines the maximum number of PCIDs the system can generate during a process that generates a PCID in programs such as Ad Hoc PCID. For example, you enter the numeric value 5 in this field. This indicates that for a PCID you intend to generate, you can create five labels.

> By default, this field is blank. If the field is blank, there is no maximum number of PCIDs that can be generated.

6. Select the **Enforce Job Receipt to Inventory** check box to indicate if package control enforcement is applied during Job Receipt to Inventory. Select this check box to enforce package control processing during the Job Receipt to Inventory transactions. Clear this check box to disregard package control processing during Job Receipt to Inventory transactions. This check box defaults as unchecked.

When you clear this flag, this indicates that the inventory is incremented and puts a move on the queue from WIP to inventory (the inventory is available immediately). If you select this flag, this means that you increase the on-hand quantities only after you complete the putaway move. This means that the inventory is not available until you move it to an inventory bin.

7. From the **Default Repack Reason Code** drop-down list, select the default Reason Code for a Repack transaction. The Reason Codes available in the drop-down menu are codes that are previously defined in Reason Code Maintenance.

8. From the **Time and Expense Default Employee ID** drop-down, select the default employee for package control transactions for Time and Expense entries. This list includes Active employees.

9. In the **Supervisor Override Password** field, enter a password that can override package control processing procedures for a supervisor.

10. In the **Minimum Job Output Generate Interval** field, enter the minimum number of seconds between PCID generations in Job Output by PCID. If you generate a PCID and then attempt to generate the second PCID within the minimum generate time interval, it will fail.

    Note: If the value is set to 0, there is no restriction.

11. Use the **Maximum Job Output Reprint Window** field to specify the maximum number of minutes after the current time a PCID can be reprinted in Job Output by PCID. If you generate a PCID and then select Reprint after the number of minutes specified in this field, an error appears and you will not be able to reprint.

    Note: If the value is set to 0, there is no restriction.

12. In the **Maximum Ad Hoc Job Output Job Window** field, enter the date range window that a job displays in the job search window or can be manually entered and selected in Ad Hoc Job Output by PCID. The value is the number of days before and after the current day that defines the date range window. The job start date is compared to the date range window and, if the date falls outside of the window, it is not available to be viewed in Ad Hoc Job Output by PCID.

    Note: The date range window is up to and including the maximum number of days before and after the current day.

    Note: If the value is set to 0, there is no restriction.

13. Use the **Maximum Partial Job Window** field to specify the date range window that a job displays in the job search window or can be manually entered and selected in Partial PCID. The value is the number of days before and after the current day that defines the date range window. The job start date is compared to the date range window and, if the date falls outside of the window, it is not available to be viewed in Partial PCID.

    Note: The date range window is up to and including the maximum number of days before and after the current day.

    Note: If the value is set to 0, there is no restriction.

14. Select **Save**.

Select the 'Track WIP Changes' check box located on this card to activate the PCID WIP functionality in Kinetic.

- **Track WIP Changes** - Select this check box to activate the PCID WIP functionality in Kinetic.

> ℹ️ To learn about the 'WIP PCID' functionality, review the Working with PCIDs and WIP article.

- **Consume WIP on Operation Completion** - When you select this check box, Kinetic removes the existing WIP material tied to a job operation.

> ℹ️ For example, you want to keep this check box cleared in situations when you don't consume all the material on your job operation. For example, some material holds weight so you need to return the material and need a record of the returned balance. If you select this check box, then Kinetic considers the material to be consumed by a job operation.

- **WIP Shipping Action** - The action you select can **warn** or **stop** you from shipping the part you have in WIP if you don't have enough quantity to fulfill the shipment line at the time of a customer shipment (Customer Shipment Entry). Kinetic also allows you to ship the full quantity without having the full quantity in your 'Shipping' warehouse and its bin. This is the **None** action.

> ℹ️ To learn more about the 'WIP Shipping Action', review the article.

Creating Package Control ID Codes

Create a Package Control ID code and to assign a portion of a range of a Control ID to the PCID (Package Control ID) for the current site. You use the **Package Control ID Configuration** app to create Package Control ID codes (PCID codes) for the current site and determine if these PCIDs are **Static** or **Dynamic**. A static PCID is one that you can reuse for different transactions. An example of a static PCID is a tote or a bin that a picker uses to select the items to carry and takes to pack for shipping. A dynamic PCID is one that you generate and disappears, or collapses, after its intended use. An example of a dynamic PCID is a shipping box in which you put a sales order's items placed directly into, and then that box ships.

If a PCID code is a dynamic PCID, you can determine the Control ID code to which the PCID code subscribes. The Control ID code is defines the available range for the company. You can then assign a portion of that range to a specific PCID for a site. This makes them unavailable for use at any other site within a company. This prevents the creation of duplicate PCIDs and facilitates the ability to ship transfers that involve a PCID between your sites. You can also assign specific package attributes to a PCID when you select a Package Code for the dynamic PCID. You cannot add or remove any segments from the Control ID code.

Using the 'Package Control ID Configuration' app you can define the attributes for both dynamic and static PCIDs. You can determine if a PCID allows voids, deletes, mixed child PCIDs, mixed parts, and other available attributes. When you allow a PCID to contain other PCIDs, this indicates a PCID can be a parent PCID. A parent PCID is a multi-level (nested) PCID that can contain both parts and other PCIDs. If a PCID is a dynamic PCID, you also have the option to specify if the PCID is Label Print Controlled and if you archive the PCID history.

In this article, we will cover:

- Creating Package Control IDs

- Reviewing Package Segments

Creating Package Control IDs

1. Open the **Package Control ID Configuration** app.

The **Landing** page displays. The page lists all the existing 'Package Control ID Code' records. To select and existing record, click on the code link inside the grid.

2. To create a new record, select **New**.

The **Detail** card displays.

3. Enter a code ID for the current site using the **Package Control ID Code** field.

> **ℹ** For example, you want to create a PCID code for a tote that is '12' inches. You can enter 'Tote12' for your 'PCID' code.

4. Enter a description to better define your PCID code in the **Description** field.

> **ℹ** For example, for the 'Tote12' PCID code, you can enter 'Tote 12in x 12in' for the description.

5. Enter the code for the PCID you are entering using the **Package Control Type** field.

- **Dynamic** - PCID that you generate and disappears after you use it. For example, a shipping box.

⚠ If you select the 'Dynamic' option then the 'Outbound Container' check box is automatically selected. However, you can clear this check box if required.

Status

☐ Active

☐ In Use

Options

☐ Allow Parent PCID   ☑ Outbound Container

☐ Allow Mixed Child PCIDs   ☐ Label Print Controlled

☐ Allow Mixed Parts   ☐ Label Print Counter

☐ Allow Mixed Lots   ☐ Allow Void

☐ Allow Mixed UOMs   ☐ Allow Delete

☐ Allow Multiple Serial Numbers   ☐ Archive PCID History

- **Static** - PCID that you can reuse for different purposes.

6. Search for and select a package code you want to associate with the PCID.

Package

Package Control ID Code *
Tote12

Description *
Tote 12in x 12in

Package Control Type *
Static

Package Code   Description
CRTN   Box Carton

When you select a package code, the **Empty Storage Location** group box activates.

7. Next, search for and select a warehouse in which the PCIDs is stored.

8. To the same for the warehouse bin.

9. Search for and select a **Control ID Code** you want to assign to the PCID you are creating.

To learn about the 'Control ID' app, review the Maintaining Control IDs article.

When you select a 'Control ID' the rest of the fields located in the 'Control' group box populate.

10. Select the check boxes in the Options group box as necessary.

- **Active** - Indicates if the Package Control ID code record is active or inactive.

- **Allow Parent PCID** - Select this check box to indicate that the selected PCID can be contained within another PCID (a parent PCID). If the check box is clear, it indicates that the selected PCID is a single-level PCID that you cannot place within another PCID (default value).

- **Allow Mixed Child PCID** - Select this check box to indicate that the PCID can contain child PCIDs with mixed part numbers, UOMs, and quantities. This is a Mixed PCID. Clear this check box to indicate if a PCID is restricted to containing single level child PCIDs (a child PCID that contain only parts) that contains the same part number, units of measure, and quantity. If you clear the check box, this indicates it is a Master PCID (default value).

- **Allow Mixed Parts** - Select this check box to indicate that the PCID can contain multiple part numbers. Clear this check box to indicate a PCID can contain only one part number (default value).

- **Allow Mixed Lots** - Select the check box to indicate if a PCID can contain multiple lot numbers for a part within a PCID. Clear this check box to indicate the PCID can contain only one lot number for a part (default value).

- **Allow Mixed UOMs** - Select this check box to indicate that a PCID can contain multiple units of measure for a part in a PCID. Clear this check box to indicate that a PCID can contain only one unit of measure for a part in a PCID (default value).

- **Allow Multiple Serial Numbers** - Select this check box to indicate that the PCID can contain multiple different serial numbers. Clear this check box to indicate that the PCID can contain only one serial number (default value).

11. If you want to be able to void this PCID and its associated items, select the **Allow Void** check box.

12. If you want to be able to delete this PCID, select the **Allow Delete** check box.

> ℹ️ This check box only activates if you select the 'Allow Void' check box.

13. Select **Save**.

Reviewing Package Segments

On the **Segments** card, you can specify the portion of the range for the 'Control ID Code' you want to assign to the current site.

You can select the specific segment for which you want to assign ranges and the alphanumeric ranges for that site. You can use the tree view to navigate through the available segments for the selected Control ID code to which you are subscribing.

When creating a Package Control ID, you cannot begin a PCID with the initial characters 'M' and 'S'. These are standard reserved characters for industry use. This means that the first segment of a PCID cannot being with an M or an S character.

> ℹ️ You create segments in the 'Control ID' app. The segment(s) that display on this card depend on the selected 'Control ID' code. To learn about the 'Control ID' app, review the [Maintaining Control IDs](#) article.

1. Select a segment link on the Segments card.

   The Segment Detail card displays.

Segment N...	Segment Desc	Segment Format	Segment Type	Segment P...
1	NUM	###	Numeric Sequential	2
2	Fixed	1	Fixed	1

   > ℹ️ This example uses '2' segments.

2. Enter the numeric starting range value for the segment.

   Alpha Starting At

   Numeric Range From
   0

   Numeric Starting At
   0

   Rollover Trigger
   Sequential ▼

Defines the starting range value for the selected segment current site. The range values you define indicate that this range is available only for this site. No other site can use the PCIDs with these values. You can define the available numeric range values for the selected Control ID segment for the company in the 'Control ID' app.

For example, you select a segment that is a numeric sequential segment with an available range from '0-1000'. You want to assign the segment values '0-499' to this site, and '500-1000' to another site. In this field you enter the starting value for this site, '0', and in the 'Numeric Range To' field you enter '499'. This indicates that this site is the only site that can use the PCID with the numerical values '0-499' for this segment.

3. Define the **Numeric Starting At** value, if necessary.

Designates an initial numeric start value for this PCID segment. When Kinetic generates a PCID number, it uses this value as the starting numeric value for this PCID segment.

For example, if you enter '1150' into this field, when Kinetic first generates a PCID number, it generates a segment number of '1150', and then increments it by one the next time it generates this segment for another PCID.

- The PCID configuration is not active and is not currently in use.

- The PCID configuration has never been generated (the read-only Numeric Range Last Value field is blank).

- The 'Numeric Starting At' field has been never been set before.

- The 'Segment Type' field must be set to 'Numeric Sequential' or 'Date Numeric'.

- You cannot modify this value once it has been set, once the configuration is in use, or once a PCID number has been generated. Generally, the only reason to use this field is if PCID segments with specific numeric values have already been generated and used outside Kinetic.

4. Enter the numeric end range value for the segment.

The range value you define indicates that this range is available only for this site. No other site can use the PCIDs with these values.

For example, you select a segment that is a numeric sequential segment with an available range from '0-1000'. You want to assign the segment values '0-499' to this site, and '500-1000' to another site. In this field you enter the starting value for this site, '0', and in the 'Numeric Range To' field you enter '499'. This indicates that this site is the only site that can use the PCID with the numerical values '0-499' for this segment.

5. Select **Save**.

6. To initialize the PCID, from the Overflow menu, select **Initialize PCID**.

Assigning Printers to Resources

In **Resource Printer Maintenance** you assign a printer to a resource for Package Control label printing purposes.

A Resource is a company's manufacturing or maintenance asset. It can be a tool, piece of an equipment, or even an employee.

You first select an active resource, assign it a printer, and then the resource can use this printer to print PCID labels.

> ⚠ You can't create new resources or printers in this app.

Use the landing pageof the application to view existing resources.

In this article, we will cover assigning a printer to a resource.

1. From the main menu, go to **Material Management > Advanced Material Management > Setup > Resource Printer**.

2. Select the **Resource ID** you want to assign a printer to.

3. On the **Resource Printers** card, select **New** ⊕ to add a printer to the resource.

4. You can add several printers to the resource, and set one of them as **Default Printer**.

Printer	Default Printer	Display Seque...	Network Path	Description
PrinterABC	☑	1	\\p-sd-1	PrinterABC

Details

Resource ID *
40T1

Description *
Press #1

Resource Printers   All

5. In the **Display Sequence** field, you can enter a numeric value to indicate the order in which the printers display for the resource.

   When a resource looks for the available printers to which they can print package control labels, it will use the printer assigned the lowest number first. The PCID label will print to printer assigned a display sequence of **1** before it will print to one assigned a display sequence of **2**.

6. Select **Save**. 💾

Setting Up Package Control Stations

In **Station Resource Maintenance**, you create and modify package control stations.

You first create a package control station, then you can assign a resource to it. A resource is a manufacturing or maintenance asset that belongs to the Company. A resource can be a tool, piece of equipment, or even an employee. The resource that you assign must be a predefined, active resource.

This app works in conjunction with **Resource Printer Maintenance**. You can assign a printer to a resource, and then you assign that resource to a package control station. When the resource performs a package control activity at its assigned station that requires a package control label, the label prints from the resource's assigned printer while at its station.

> ⓘ   This feature is only available if you install the **Advanced Material Management** license.

Use the landing page of the application to view existing package control stations, or to enter a new one.

In this article, we will cover:

- [Creating a package control station](#)

- [Assigning a resource to a package control station](#)

Creating a Package Control Station

1. From the main menu, go to **Material Management > Advanced Material Management > Setup > Station Resource**.

2. Select **New** ⊕ to add a new package control station.

3. In the **Station** field, enter a short code that will help you identify this station later.

4. In the **Description** field, enter additional information to describe the package control station.

5. Note, the package control station defaults as **Active**.

   If you clear this check box, the record becomes **Inactive**. This retains a station record, but removes it from available station options at which you can perform package control activities.

∧ **Details**		
Station STATION1 🔍	Description Station 1	☑ Active

6. Select **Save**. 💾

Assigning a Resource to a Package Control Station

1. On the **Resources** card, select **New** ⊕ to add a new resource to the package control station.

2. In the **Resource** field, enter a previously defined, active resource you want to assign to the station. You create a resource in **Resource Group Maintenance**.

3. In the **Description** field, review the additional information you enter for the selected resource in **Resource Group Maintenance**. Details here.

4. The assigned resource is **Active** by default. However, you can inactivate it. This means you can retain an associated resource's record as an option for that station, but no longer make it available to perform package control activities.

5. Select **Save**. 💾

Assigning Printers to Transaction Types

In **Transaction Routing Maintenance**, you assign a printer to a transaction type. This printer then prints labels based on a transaction type for the current site.

You can also set up printer-transaction type associations in order to print a PCID (Package Control ID) label for a process that involves a PCID that you execute.

You perform a pick transaction. You pick a sales order into a dynamic PCID. A dynamic PCID is a PCID that you generate and disappears after you used it (for example, a shipping box). You determine that this transaction type warrants you to print a label. You use **Transaction Routing Maintenance** to designate the printer at which you print the labels for this pick transaction.

In this app you don't create any new printer or transaction type records. The transaction types are hardcoded into Kinetic. For more info on transaction types, review Understanding Transaction Types article. All printers are also pre-defined in **Printer Maintenance**.

⚠️ This app is only available if you have the Advanced Material Management license.

Use the landing page of the application to view existing transaction types.

In this article, we will cover assigning a printer to a transaction type.

1. From the main menu, go to **Material Management > Advanced Material Management > Setup > Transaction Routing**.

2. Select **New** ⊕ to add a new printer-transaction type association.

3. Select the **Transaction Type**.

4. On the **Printers** card, select **New** ⊕ to associate a printer with the transaction type.

5. You can add several printers to one transaction type. If you want, you can re-order the printers using the **Display Sequence** field.

6. Every printer that you add defaults **Active**. If you want to remove a printer from available options for the transaction type, but retain the printer association for future use, set it to **Inactive**.

7. Select **Save**. 💾

Working with Control ID Extract Maintenance

In **Control ID Extract Maintenance** you specify the rules that determine how to extract a PCID (Package Control ID) from a barcode that you manually enter, or scan during an inventory transaction.

More info here

A PCID is a serial ID of alphanumeric characters within a constructed barcoded string. A PCID is a value against which you can place transactions. A barcode is a barcoded string of alphanumeric characters based on a predetermined construction specific to a company (the PCID). You usually see barcodes on a label of a package, or container you receive or send.

In **Control ID Extract Maintenance**, you specify the rules that determine what to extract, and what to discard from a barcode. You first create an extract code, and define its segments. Then you create extract rules for data identifier codes, that specify where the PCID exists within the barcode string.

You can define extract codes for 1 dimension, and 2 dimension barcodes.

- For 1 dimension barcodes (1D), the extract code contains a single PCID segment, and no other segments. It can contain multiple PCID extraction rules.

- For 2 dimension barcodes (2D), the extract code contains additional information such as the data identifier, the extract sequence, and separator characters. The extract code can contain multiple segments, but only one PCID. Based on whether a barcode is fixed length, or variable, there are different ways to locate the PCID. The extract code can contain multiple PCID extraction rules.

> For Example, your company receives a package with the barcode **1J123XXX123**. You defined in the **Control ID Extract Maintenance** app, that the barcodes with the Data Identifier **1J** have a length of 13 characters. You want to extract 9 characters from the right of the barcode to stand as the PCID. You scan the barcode **1J123XXX123** during a receipt transaction. Kinetic extracts **123XXX123**. This value acts as the PCID for this package.

> You cannot add duplicate Data Identifier or an Extract Sequence entries within a company. You can only enter a value once for each of these fields within a company.

> The extract feature is only available if you have the Advanced Material Management license.

Use the landing page of the application to view existing extract codes, or to enter a new one.

In this article, we will cover:

- [Adding an extract code](#)

- [Creating a PCID segment](#)

- [Creating an extract PCID rule](#)

Adding an Extract Code

1. From the main menu, go to **Material Management > Advanced Material Management > Setup > Control ID Extract**.

2. Select **New** ⊕ to add a new extract code.

3. Enter the **Extract Code** identifier, and **Description**.

4. Enter the **Extract Sequence** number. This value determines the order the data identifiers will use to analyze a barcode to locate an appropriate match.

> Assign the extract codes for the barcodes you enter most often. This allows for a quicker processing time.

 Show me example

An extract code with an **Extract Sequence** value of **1** is the first extract code analyzed. If the match fails, Kinetic analyzes the extract code with an **Extract Sequence** value of **2**, and so on, until it locates a match. If Kinetic locates no match, the string is a stand-alone Control ID.

5. In the **Dimension** field, select if the extract code relates to 1D, or 2D barcodes.

6. If you create the extract code for a 2D barcode, you will need to enter additional information.

 More info here

The 2D barcode can be a **Fixed Length**, or a **Variable Length**.

For a **Fixed Length** barcode, you additionally need to set the number of digits in the string. The **String Length** can be from **1-1000** digits.

For the **Variable Length** barcode, you need to enter information in the following fields:

- **Date Identifier** - Specifies the characters used to identify a 2D barcode. For example, []>.
- **Data Format** - Identifies the character string match for the left side characters of the string, defined with this set of Control ID Extract rules. At this time, **06** is the only valid value for this field.
- **Record Separator** - This character separates different records. For this process, only **1-127** are valid ASCII characters.
- **Group Separator** - This character separates different segments. For this process, only **1-127** are valid ASCII characters.
- **Message Trailer** - Identifies the End of Transmission character for this set of Control ID Extract rules. For this process, only **1-127** are valid ASCII characters.

7. Select **Save**.

Adding a PCID Segment

On the **Segments List** card, you maintain segment details for barcodes, and extraction data used to read the information.

> ⓘ A one dimension barcode can only have one segment. That segment must have a segment type of **PCID**.

1. Select **New** ⊕ to add a segment to the extract code.

2. In the **Segment Type** field, select the type of extract segment.

   Segment types here

   For fixed length segments, the following segment types are available:

   - **Other** - You use this type with the PCID segment position value to determine how the extraction process treats the segment. Based on the **PCID Segment Position**, the extraction logic does one of the following:

     ◦ If the **PCID Segment Position** is greater than **0**, the extraction logic builds a concatenated string that represents the PCID for extraction.

     ◦ If the **PCID Segment Position** is **0**, the information is not important to the extracted PCID value.

   - **PCID** - Defines a single piece of the barcode as the only segment that holds the PCID value.

   For non fixed length segments, the following segment types are available

   - **Other** - The extract segment is a segment that is not a PCID, and has a type of **Other**. Selecting this option enables the **Data Identifier** field. Kinetic uses the **Data Identifier** value and its associated rules to extract a Control ID based on the specified parameters.

   - **PCID** - The extract segment is a PCID. If the segment has a type of **PCID**, Kinetic uses the values on the **Extract Rules** card to extract the PCID.

   > ⓘ If you use the **PCID Segment Position** value, all segments in control ID should have a segment type of **Other**.

   > ⓘ There can only be one segment in an extract code with a segment type of **PCID**. All other segments must have a segment type of **Other**.

3. In the **Data Identifier** field, enter the character string to match the segment with the barcode. The **Data Identifier** is the left-side of the alphanumeric string from which you recognize the segment. The data identifier is generally a portion of the barcode you discard after you extract

the segment.

Show me example

You create an extract code with an **Other** segment. You define an **SG** data identifier for the segment. This means that for a segment to match with this code, the initial characters of the segment must have the data identifier of **SG**. You scan the barcode **123XXXSG123** during the receipt of a package. This means that the extract segment is **123**.

> ℹ️ This field is only enabled if the barcode is a **Fixed Length** type, and the segment type is **Other**.

4. In the **PCID Segment Position** field, determine the PCID segment position within the extracted control ID.

> ℹ️ You use this field with fixed length 2D barcodes.

5. In the **Position Start**, and **Position End** fields, specify the character position in the control ID extract rule, where this segment starts, and ends. The segment start and end character positions cannot overlap.

Segment Number	Segment Type ↑	Data Identifier	PCID Segment Position	Position Start	Position En
2	OTHER	Q	0	0	
4	OTHER	20L	0	0	
5	OTHER	21L	0	0	
6	OTHER	K	0	0	
7	OTHER	15K	0	0	
8	OTHER	7Q	0	0	
9	OTHER	2S	0	0	
10	OTHER	CK	0	0	
3	PCID		0	0	

6. Select **Save**. 💾

Creating an Extract PCID Rule

1. On the **Extract Rules** card, select **New** ⊕ to create a new extract rule.

2. In the **Data Identifier Code** field, enter the unique code that will contain the extraction rules of a Control ID from a barcode for specific data identifiers.

3. Add a **Description**.

4. Enter the **Data Identifier**. Kinetic will use this value to extract a Control ID when it encounters a barcode with these characters.

5. In the **Extract Sequence** field, determine the order in which the app will use the data identifiers to locate a match when it encounters a barcode.

6. Enter the **Scan Maximum Length**, **Scan Minimum Length**, and **Digits From Right**.

Data Identifier Code	Data Identifier Desc.	Data Identifier	Extract Sequ...	Scan Max Le...	Scan Min Le
CHRYSLER	CHRYSLER 1D BARCODE	CHRYSLER	1	20	1
GM1J	General Motors 1J PCID	1J	2	14	
GM2J	General Motors 2J PCID	2J	4	14	
yur			0	0	

7. Select the **Active** check box to activate the control ID extract record. You can now use the data code identifier and related rules to extract a control ID out of a barcode.

Setting Up Package Control Label Types

In **Package Control Label Type Maintenance**, create label types for PCIDs. You establish the PCID number that generates for your selected label type and the label format that prints. This means that you must specify the number of labels to print, the report location, and a PCID code. You can also associate a Package Code with a label type to specify a label type's package attributes. When auto print runs, it looks at the values define in the Package Control ID Code, Number of Labels to Print, and Report Style fields and uses these values to determine the PCID number that generates onto the label, the number of labels that print, and the label format to use. The report ID that prints for the label is the GenPCID BarTender label format.

The available label types that you can define are:

- Contents
- General
- Static
- Internal
- Individual
- Master
- Mixed Master

If you select the Mixed Master type label, you also have the option of determining the number of parts that you can associate with that label.

For the General, Internal, Individual, Master, and Mixed Master label types you must enter information in the Package Control ID Code, Number of Labels to Print, and Report ID fields. If you do not enter information in these fields, when you attempt to print one of these label types it results in an error. For a Static label type, you can only define one label type record for a Package Code at a site. For example, you create a static label for the package code Tote12. You cannot create another static label with this same package code in the same site.

You can also use the Package Control Label Type Maintenance option fields to define more flexible label types. These fields include the Customer, Ship To, and Part fields. You can define label types for one, two, or all three of these levels. During a transaction that requires a label to print, the available label types are analyzed to determine which label type has the greatest number of matches, the highest order match, for these optional fields. After it determines the best match, the specified label format prints for the transaction. After you create and save a label type, you can no longer update the Site, Label Type, Customer, Ship To, and Part fields. If you need to update those fields, you must delete the existing record and create a new record.

For example, you define the following label types for your main site.

Site	Label Type	Customer	Ship To	Part	Package Code	PCID Code	Number to Print	Report ID	Report Style
Main	Individual	A	01	X	-	A-Range	2	GenPCID	A-IND001
Main	Individual	A	02	X	PKG12	A-Range	2	GenPCID	A-IND001
Main	Individual	A			-	A-Range	2	GenPCID	A-IND001
Main	Static	B			TOTESM	(null)	1	GenPCID	Static-Tote
Main	Master	A	01	Y	-		1	GenPCID	A-Master
Main	General				-	Main-Range	1	GenPCID	Main-GEN

During a shipping transaction that requires you to print a label, you ship an order for Customer A, Ship To 01, for Part Y. In this situation, the label that prints is the Master label type as it has the greatest number of matches for the Customer, Ship To and Part fields.

During another shipping transaction that requires a label, you ship an order to Customer A, Ship To 02, for Part Y. In this situation, the best match in one of the Individual label types. In the table above, the label format that prints is the one specified in the third row.

> **i**   This feature is only available if you install the Advanced Material Management license.

Use the landing page of the application to view existing package control label types or to enter a new one.

In this article, we will cover creating label types.

1. From the main menu, go to **Material Management > Advanced Material Management > Setup > Package Control Label Type**.

2. Select **New** ⊕ to add a new label type.

3. From the Label Type drop-down menu, select the label type you wish to define. The available options include: CONTENTS, INTERNAL, GENERIC, STATIC, INDIVIDUAL, MASTER, and MIXEDMASTER.

   > **i**   The **Contents**, **General** and **Static** label types are available if you have an AMM license. You can select the Internal, Individual, Master or Mixed Master label types only if you have an Advanced Package Control license.

4. If you want to assign this label type to a specific customer, use the **Customer** search icon to search for and select a customer.

5. To assign a label type to a customer's Ship To location, select the **Ship To** button to search for and select the Ship To location. This is an optional field. You can only select a Ship To location, if you select a Customer.

6. Select the **Part** button to search for and select the part record that you want to assign to this label type.

7. If you associated the label type with a Part record, you can select the **Is Part Default** check box to indicate that the label type is the default label type that prints for this particular part.

8. Select the **Package Code** and **Package Control ID Code**.

9. In the **Max Part Quantity Per Label** field, enter a number value to specify the number of unique parts you want to associate with a Mixed Master label type. This field enables only if you select the **Mixed Master** type in the **Label Type** field. For all other label types, this field is

disabled.

10. In the **Number of Label to Print** field, enter a numeric value to specify the number of labels that print for the selected label type. You must enter a value of 1 or greater.

11. Select a **Report Style** for the Report ID.

12. Select the **Prompt User** check box to indicate that you want to prompt the user to be able to select a different report style during the print routine.

13. Verify the **Active** check box is selected. If the check box is not selected it reads as Inactive. Select the Inactive check box to activate a label type. Clear the Active check box to inactivate a label type.

Your screen will look as follows:

14. Select **Save**.

Maintaining Control IDs

Create control IDs, determine their ranges, and define how the control ID segments generate at the company level that are subscribed to at the site level in **Control ID**.

> ⚠️ This application is only available with the **Advanced Material Management** license.

A control ID is a serial number against which you place transactions to track stock movement throughout the inventory processes. For example, a selector set item A into the control ID PCID1234 (Package Control ID). Use **Control ID** to define control IDs at the company level and specify the complete range available to the entire company. In the above example, you previously defined an available control ID range for the company of PCID 1000 - PCID 2000. PCID 1234 is on the control ID from the available range.

A control ID is an identifier you use in your company against which transactions can be placed. You can use the control ID alone or as a part of a license plate. A license plate is a bar-code string with a predefined construct. To extract a control ID from a license plate, use the **Control ID Extract** application.

If you have a multi-site environment, you can then specify a portion of the range for each of their sites. **Control ID** provides the functionality to define the available control IDs for your company. You define parts of these ranges available for your company for your different PCID configuration sites. You ensure that no two sites have duplicate control IDs by assigning portions of the ranges to each site. This restriction allows you to transfer control IDs within your company's sites.

Use the landing page of the application to view existing control ID records or to enter a new one.

In this article, we will cover:

- Adding a Control ID Record
- Adding a Segment List
- Activating the Control ID and Reviewing Its Details

Adding a Control ID Record

Define the code, description, and view an example on the **Details** card.

1. From the main menu, go to **Material Management > Advanced Material Management > Setup > Control ID**.

2. Select **New** ⊕ to add a control ID record.

3. Enter a unique identifier for the control ID in the **Control ID Code** field.

4. Add the description of the control ID.

5. Select **Save** . 💾

   You can activate the control ID code, review its details and example only after you add at least one segment to it.

Adding a Segment List

Define and maintain the segments of a control ID on the **Segment List** card.

1. On the **Segment List** card, select **New** ⊕ to create a new segment record.

2. Enter the segment description.

3. Select the type for the segment you're adding.

   The following options are available:

   - **Numeric**
   - **Date-Numeric-Sequential**
   - **Date**
   - **Fixed**

   Depending on the type you select, you will have to enter the respective formats and values. For example, if you select the **Number Sequential** type, you will also need to enter its format using **####** for the number of numeric values as well as its **Numeric Range From** and **Numeric Range To**. If you select the **Fixed** type, you will only need to enter the fixed value in a format you define.

You can have an unlimited number of fixed segments but only one of the **Sequential** and **Date** segment types can exist. Furthermore, you can only use **Date-Numeric-Sequential** segment if the code also contains a **Date** segment.

4. Specify the input format for the segment in the **Segment Format** field. The format must correspond to the type you selected.

Segment Description	Segment Type	Segment Format	Segment Position
Pkg Segment 1	Fixed	PKG	1
Pkg Number ID	Numeric Sequential	####	2

- **&** - Alphanumeric
- **@** - Alpha-only
- **#** - Numeric only
- **<DD>** - Two-digit day
- **<MM>** - Two-digit month
- **<YY>** - Two-digit year
- **<YYYY>** - Four-digit year
- **<TJD>** - Five-digit truncated Julian date
- **<T>** - 6 digit integer of time
- **Fixed** - A fixed value that can contain A-Z, 0-9, -

5. Enter a position number for the selected segment in the **Segment Position** field. For example, the segment with position **1** will be the first one. You cannot duplicate segment positions within a Control ID.

6. Depending on the type you selected, also specify:

- **Alphanumeric Range From**, **Alphanumeric Range To** - Start and end range alphanumeric character values available for the segment at the company level.

  > When creating a control ID, if the initial segment is an alphabetical character, you cannot begin the control ID with the initial characters **M** and **S**. These are reserved for industry use. This means that the first segment of a PCID cannot being with an **M** or an **S** character.

For example, you select the alphanumeric segment format for a segment that ranges from **AA** to **ZZ** for the current company. Then you need to enter **ZZ** for **Alphanumeric Range To**.

- **Numeric Range From**, **Numeric Range To** - Start and end numeric range values available for the segment at the company level. For example, if you select the **Numeric-Sequential** segment type, you can use **0** for **Range From 9999** for **Range To**.

7. Select the **Rollover Trigger** option. This option sets up whether certain format types need adjusting at certain points in their generation. The options depend on the segment type:

- **Date** - Date Change
- **Date Numeric Sequential** - Sequential
- **Fixed** - Fixed
- **Numeric Sequential** - Sequential

8. If you specify a rollover trigger, select a rollover action that will occur when the segment reaches its rollover trigger in the **Rollover Action** field. If the rollover trigger is **Sequential**, the valid actions are **Stop** and **Range From**. This means that a control ID segment can stop generating or it can begin again at the value you define in the **Range From** field. If the rollover trigger is **Fixed** or **Date**, there is no available rollover actions and the field is blank. When a change in date occurs, the application changes the date in the segment.

9. Review the **Character Used** and **Example** fields, if necessary.

10. Select **Save** . 🖫

Activating the Control ID and Reviewing Its Details

1. Go back to the **Details** card and select **Active** check box to make the record available for referencing in **Package Control ID Configuration**.

2. The control ID type fields defaults to **Package**. You can define a control ID that is a package type up to 12 characters in length.

Details

Control ID Code *
PKG02

Control ID Type *
Package

Example
PKG8888

Description *
Package Control ID 02

☑ Active

☑ In Use

Range From
PKG0001

Range To
PKG1000

Defined Segments
2

Number of Characters Used
7

3. Review an example of how the control ID code generates based on the parameters you define in the **Example** field.

4. In the **Range From** and **Range To** fields, review the start and end ranges for a control ID at the company level.

5. Review the **Defined Segments** field. It displays the number of segments that you defined for the control ID (use the **Segment Detail** card for that). A control ID can contain up to 80 characters. This means a control ID can have up to 80 segments of individual characters, inclusive of separators.

6. Review the **Number of Characters Used** field. It displays the number of characters the control ID uses. This can be up to 80 characters, inclusive of separators.

7. Select **Save** . 💾

Once you reference a control ID code in **Package Control ID Configuration**, the system marks the control ID code as **In Use**.

General Operations

This section of the user guide covers maintenance apps relevant to the 'Advanced Material Management' (AMM) module.

Importing PCIDs to Overlay Existing PCIDs

Companies in the automotive industry may supply 2D barcodes to manufacturers to apply to containers before they ship them. You need to import those barcodes into your Kinetic to replace existing PCIDs generated during the manufacturing or inventory movement process. You can use **PCID Overlay Import** to scan or manually enter a 2D barcode, then extract PCID data and import the extracted PCID. You then overlay the imported PCID on an existing PCID or place on a repack container.

When you overlay a PCID used during manufacturing or inventory movement with an imported PCID, Kinetic archives the original PCID. The imported and extracted PCID is the PCID you use going forward.

> ℹ️ You define the extraction logic used to locate and extract PCIDs from barcodes in [Control ID Extract](#).

When you import a PCID from this app, you import a Staged PCID. This means you import the PCID label but have yet to associate the specific inventory currently in the warehouse with the PCID. To do so, you need to reconcile the PCID label with the inventory. To reconcile an overlay staged PCID label with inventory you can use the **Overlay PCID Label Validate** (Data Collection) app or **Repack/Reclass** (Data Collection).

The transaction type that you generate when you import a PCID from this application is the **PKG-OLY** transaction type.

> ℹ️ The **Suppress Print Messages** check box inEmployee Maintenance designates if Kinetic should suppress to display PCID generation print messages when the associated employee uses PCID-related apps. If selected, Kinetic automatically sends the generated PCID labels to the assigned printer.

After you create your label, you can then use the **Overlay PCID Label Validate** (Data Collection) app to validate the existing PCID and the replacement PCID that will overlay the existing PCID.

In this article, we will cover importing an extracted PCID to overlay the existing PCID.

Advanced Material Management User Guide

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > PCID Overlay Import**.

2. Scan or manually enter the barcode in the **PCID** field. The extracted PCID displays.

3. Select the **Customer** and the **Ship To** (if any) associated with the PCID.

4. Select the **Customer Part** for the parts in the PCID.

5. In the **Shift** field, specify the shift during which you are importing the PCID.

6. Select the **Package Code** button to switch between package codes and select the one you need.

7. Enter the **Source PCID** that determines the original PCID that you intend to replace or repack.

> ⓘ   The Source PCID must have a Package Control Type of **Dynamic**.

8. Enter the **Qty Per Container** to specify the quantity of parts for the overlay PCID.

9. Assign a printer to print out the imported PCID label in the **Printer ID** field. The Printer ID defaults from the printer you assign to the transaction **PKG-OLY**.

10. Select **Import PCID**.

11. The panel displays with the imported PCID number. If you haven't enabled auto printing, the application will also ask you whether you want to print the PCID label.

epicor

48   July, 2025

⑦ **Question**

PCID PCID 55 has been imported. Print Now?

<div style="text-align: right">

Yes   No

</div>

12. Select **Yes** if you want Kinetic to immediately send the PCID label to the assigned printer.

Moving WIP

The **Move WIP** app allows you to move a work in progress (WIP) part from one job operation to another. When you use the app, it updates the 'PartWIP' table, and if the job contains a serial tracked part, Kinetic updates the serial number and serial tracing tables to reflect the newly assigned operation.

Assume you are manufacturing '10' units of the 'Lawn Mower' part. The assembly part holds two sub-assemblies, 'Lawn Mover Engine' and 'Lawn Mover Cover'. The 'Lawn Mower' assembly also

includes '2' operations, 'Assemble Per Print' and 'Assembly'.

In this article, you will:

- [Issue Assembly](#)

- [Move WIP](#)

- [Review the Part Tracker](#)

Issuing Assembly

First, you need to issue the two sub-assemblies to your job. Using this example, we are issuing assemblies to job '2433'. However, this is just an example.

> ⓘ   To learn about how to issue assemblies, review the Issuing Assemblies article.

1. Open the **Issue Assembly** app.

2. In the Job field, enter the job number and press **Tab**.

3. On the To card, select your assembly in the **Assembly** field.

   > ⓘ   Again, we are following the 'Lawn Mower' example. Therefore, we select assembly #1 (LawnMowerEngine).

4. Define the quantity in the **Quantity** field.

    In this case, we are entering '10' pieces.

5. Select **Save**.

6. In the Assembly field, select your assembly.

    ℹ Since we are using the example with '2' sub-assemblies, we select assembly #2 (LawnMowerCover). However, you sub-assembly structure will be different. This is just an example.

7. Enter **10** in the **Quantity** field.

8. Select **Save**.

9. Exit the **Issue Assembly** app.

Moving WIP

Since we have issued the two sub-assemblies, let's now move WIP.

> ℹ️   We are following the 'Lawn Mower' example.

1. Open the **Move WIP** app.

    The Landing page displays.

2. Enter the job number in the Job field and press **Tab**.

3. Select **Available WIP Locations**.

    The **Search** panel opens.

4. Inside the panel, select **Search**.

5. Inside the **Search** panel, select the first sub-assembly part.

    > ℹ️   The 'Lawn Mower' assembly used in this example holds two sub-assemblies, 'Lawn Mower Cover' and 'Lawn Mower Engine'.

Once you make your part selection, select **OK** inside the panel.

Now, you can move the selected sub-assembly and its quantity from one warehouse/warehouse bin to another.

6. In this example, we move the quantity to bin **00-00-00** in the **Main** warehouse.

7. Select **Save**.

8. Exit the Move WIP app.

Reviewing the Part Tracker

The last step in the process is to review what has been moved and where.

> ℹ️ As an example, we use the previously moved subassembly.

1. Open the **Part Tracker** app.

   The Landing page displays.

2. In the Part field, enter your part and press **Tab**.

3. Select the **Activity** page.

4. Scroll down to locate and expand the **On Hand - Part Locations - WIP** card.

   This example shows that the Main warehouse/bin 00-00-00 holds '10' units. Remember, we previously moved the 'LawnMowerCover' sub-assembly.

5. Exit the Part Tracker app.

Creating a Request to Move Miscellaneous Material

If you need to return part quantities from one warehouse/bin to another and these part quantities are not linked to a job, then you can request a return in the **Return Miscellaneous Request** app.

You can then process this request within the **Material Request Queue** app. The app creates a material transaction that can change the cost, quantity, and location of this material.

In this article, we will cover returning a part to a specific warehouse/ bin:

1. From the main menu, navigate to **Material Management > Advanced Material Management > General Operation > Return Miscellaneous Request**.

2. Enter or search for a part in the **Part** field.

3. Select the required attribute set under the **Attribute Set** group box.

   You define or review attribute sets using **Dynamic Attribute Set Maintenance**.The app records data associated with a part that was processed via **Quote Entry**, **Sales Order Entry**,

Purchase Order Entry, and **Receipt Entry**. However, you must set a part to **Track Inventory** attributes and associate it with a dynamic attribute.

> ℹ️ In Kinetic, each attribute set is tied to an attribute class and each attribute class is associated with a part.

Let's say you want to return material for 5 pieces of the **100,46, 4x8,** Half part dimension. Once you select the attribute set and define the quantity of **5**, Kinetic will adjust in line with the selected part dimension.

Additionally, you can adjust your warehouse level as well. For instance, you buy the **Metal Sheet** part in pounds but stock it in various dimensions. Five sheets of the **100,46, 4x8**, half dimension may weight **500** LB (Pounds). Once you confirm your material return with the selected attribute set, the pound weight of **500** LB will be deducted from your original pound value that includes all the dimensions. For instance, your bins carry the following dimensions:

- 10 units of the 4x8 Half dimension
- 10 units of the 4x10 Half dimension
- 10 units of the 4x4 Half dimension

The combined weight of all units is **5,000** LB. If you return material for 5 pieces of the **4x8** Half dimension, the total weight increases to **5,500**.

4. Enter the quantity in the **Return Material** field under the **Quantities** group box.

> ⚠️ The returned quantity cannot be greater than the quantity initially issued.

> ℹ️ UOM is the unit of measurement in which you can specify the quantity.

5. Specify the following:

- Warehouse from which you need to return the material in the **From Warehouse** field.
- Bin from which you need to return the material in the **From Bin** field.
- Warehouse to which you need to return the material in the **To Bin** field.
- Bin to which the you need to need to return the material in **To Warehouse** field.

The Kinetic application validates:

- That the specific bin number is established in **Warehouse Bin Maintenance** for the respective warehouse.
- That the assigned bin type is either supplier-managed or customer-managed.

The Kinetic application then validates that the supplier / customer code associated with the transaction / material being moved matches the supplier / customer code assigned to the warehouse bin in the **Type** field of the **Warehouse Bin Maintenance**.

6. Select **Save**.

The material returns to the warehouse/bin you specified.

Creating a Request to Return Assembly / Material From WIP to Stock

If you need to return an assembly or a material from a WIP job to stock, you can request a return in the **Return Assembly Material Request** app.

You can then process this request within the **Material Request Queue** app. The app creates a material transaction that can change the cost, quantity, and location of this material.

> You must install the 'Advanced Material Management' (AMM) license.

In this article, we will cover returning an assembly / material to stock from a WIP job:

1. From the main menu, navigate to **Material Management > Advanced Material Management > General Operation > Return Assembly Material Request**.

2. Enter or search for a WIP job in the **Job Information** field.

3. Select an assembly in the **Assembly** field.

4. Select the **Attribute Set**, if the part is inventory tracked.

5. In the **Request Lines** card, review the material quantity that you have already issued to the job in the **Issued Qty** field.

> UOM is the unit of measurement in which you can specify the quantity.

6. Enter the quantity you want to return in the **Request Qty** field.

> In Kinetic, you can enter the quantity as a whole or in decimals in this field. You can set the **Allow Decimals** and **Decimals** fields in UOM Maintenance for the selected UOM code.

> In the Kinetic app, if the **Track Multiple UOMs** check box is selected for the part in Part Maintenance, you cannot enter negative quantities. An error message appears when the quantity you enter is greater than the on-hand quantity.

7. The **Number of Pieces** field displays the number of pieces for the part you track. You can also first add the **Number of Pieces** value and the app will calculate the **Request Quantity**.

   Lets say the attribute set for the part you want to return is **50** square inch of the Metal Sheet part and you need to return **300** square inch:

   - You enter **300** in the **Request Quantity** field. In this case, the **Number of Pieces** field displays the value of **6**, since you are returning six **50** square inch of the Metal Sheet part.
   - If you first added the **Number of Pieces**, Kinetic calculated the **Request Quantity** value. In this case, **300** square inch. Based on this example, the **Number of Pieces** field displays the value of **6**.

8. Enter the UOM, such as **Each**, **Case**, or **Feet** in the **UOM Code** field.

9. Specify the warehouse and bin from which you need to return the material in the **From Warehouse** field and **From Bin** field respectively.

10. Specify the warehouse and bin to which you need to return the material in the **To Warehouse** field and the **To Bin** field respectively.

11. Select **Save**.

Adjusting Package Return Quantities

Through **Package Return Adjustments**, you can adjust returnable package container on-hand quantities (for a selected internal part, customer container part or package code) in designated warehouse bins. It operates in a manner similar to the standard Quantity Adjustments app used for inventory quantity adjustments; you can adjust a returnable package quantity up or down, and can also use it to establish initial returnable package quantities stored in designated warehouse bins.

It is common practice in many businesses that their customers request their orders be shipped in specific containers (usually containers or pallets made of various materials). These containers are sometimes owned by the supplier and other times they are owned by the customer. Typically, customers require their suppliers to keep track of how many shippable containers are on hand, and how many they have shipped, in order to know if their supply is running low and will need more containers in order to fulfill any future demand that might get shipped. A receiving clerk can use Package Return Adjustments to adjust on hand quantities when package containers are returned by customers; it uses the adjustment codes defined for the package container in the Reason Code In and Reason Code Out fields in the Package Code Maintenance > Internal Part by Site card.

> ℹ️ To use this program, verify the **Enable Package Control** check box is selected for the current site in the **Site Configuration Control > Modules > AMM > Package Control** card. After you enter the internal part number and select a package code, the application validates that the **Track Returnable** check box has been selected for the internal part/package code combination in the **Package Code Maintenance > Internal Part by Site** card.

In this article, we will cover creating adjusting package return quantities

1. From the main menu, navigate to **Material Management > Advanced Material Management > General Operations > Package Return Adjustments**.

2. Specify the returnable container for which you are adjusting inventory on-hand quantities. You can search by internal part you have assigned to the container, by the part number your customer container number has assigned to the container or by the package code assigned to the container.

3. Enter the internal part you assigned to the container in the Internal Part field.

4. In the **Cust Container Part** field, enter the part number your customer uses to identify the returnable container, or select Internal Part to access Internal Part Search and browse for the correct customer container part number.

5. In the **Package Code** field, enter the package code you assigned to the returnable container.

6. Enter the date on which package return quantity adjustment transaction occurred.

7. Select the warehouse in which the package return quantity adjustment is being made.

8. Highlight the appropriate bin in the **Warehouse Bins** grid.

9. In the **Quantity** field, enter the package return adjustment quantity (positive or negative).

10. select a reason for the package return adjustment from the **Reason Code** field.

11. (Optional) In the **Reference** field, add additional free form comment text or reference information for the adjustment transaction.

12. Select **Save** to adjust the quantity.

13. If your company uses legal numbers for quantity adjustments and the generation type is Manual, a Legal Number prompt displays. Enter the legal number for the package return adjustment and select OK.

    If the legal number generation type is Automatic, the legal number automatically generates when you select Save.

> ℹ️ To generate legal numbers for package return adjustments, a legal number format must be defined in Legal Number Maintenance and at least one Stock Quantity Adjustment transaction document type must be selected.

Using Inventory Transfer by PCID

Run **Inventory Transfer by PCID** to transfer parts associated with a specified Package Control ID (PCID) from one warehouse and bin to another. You can transfer inventory to nettable or non-nettable inventory bin locations. You can only enter or select bin numbers associated with the specified warehouse number; the specified bin can be nettable or non-nettable, but cannot be a Customer or Supplier-Managed bin.

You can transfer items that are currently associated with a standard inventory PCID. These are the PCIDs that you received through inventory and have associated with the physical inventory through programs such as Job Receipt to Inventory by PCID or when you directly pick items into a PCID. You are not able to transfer PCIDs that are currently staged, such as those you produce from Job Output by PCID.

To transfer inventory by PCID:

1. In the **Warehouse** field, enter the identifier for warehouse to which you are moving the part or select the search icon to search for and select a valid warehouse number.

2. In the **Bin** field, enter the identifier for warehouse bin to which you are moving or select the search icon to search for a valid warehouse bin number. You can only enter or select bin numbers associated with the specified warehouse number.

> ℹ️ The specified bin can be nettable or non-nettable, but cannot be a Customer or Supplier-Managed bin.

3. In the **PCID** field, enter or scan the PCID for which you wish to create an inventory transfer transaction.

4. Select **Save**. 💾

Creating Partial PCIDs

Let's say you are a member of the production or materials department at a site that uses the Package Control functionality. You produce a container of parts, but this job is only partially complete at the end of a shift and the container doesn't contain a full quantity of items. However, you need to generate a PCID for this container.

In this case, you can create a partial PCID in the **Partial PCID** application. You can also use this app to generate a PCID for a partially complete container when you require a repack.

You later consume these partial PCIDs to create full containers in **Job Output by PCID**. After a partial PCID is consumed, Kinetic removes it from the staging tables. You then reconcile with the inventory tables when you generate a new PCID in **Job Output by PCID** and receive the items to inventory in **Job Receipt to Inventory by PCID**. A partial PCID writes a record to the Split/Merge table when you create it. When you consume the partial PCID in **Job Output by PCID**, Kinetic updates the associated record with the PCID in which the partial PCID was consumed.

A shift change is about to occur. From job **2934** you create **12** parts of part number **00C1A**. However, for the container to be considered complete, you need **24** parts of **00C1A**. So you create partial PCID **ERP1234** for job **2934**. Kinetic keeps this PCID in the staging tables. You later decide to use PCID **ERP1234** to complete a container for job **5639**. This means in Job Output by PCID, in the partials grid, you select **ERP1234** and create a full container of **24** parts with this PCID, and another **12** you produce from job **5639**. At this point Kinetic creates a record in the split/merge tables for the partial PCID. You can then generate a new PCID, **ERP3478**, from Job Output by PCID. This consumes PCID **ERP1234** from the staging tables. Kinetic adds your new PCID, **ERP3478**, into the staging tables. You can later move this PCID from the staging tables to the standard inventory PCID tables through Job Receipt to Inventory by PCID.

> You can only generate a partial PCID for jobs scheduled to start within the date range window. If you attempt to create one for a job scheduled to start earlier or later than the set date range window, an error message displays. The date range window is the number of days before and after the current date. You define the maximum partial PCID job window for a site in the **Maximum Partial PCID Job Window** field in Site Configuration Control.

When you generate a partial PCID, you generate a Staged PCID. You later need to reconcile the staged PCID with inventory before you can ship the items. You need to do it to avoid over-inflating of inventory amounts. When you select the **Generate PCID** button, the app creates the PCID header and item records and updates the status of the PCID to **WIPFG**. The generated PCID has an internal or generic label type. If the label is print controlled, the label type is **Internal**. If the label is not print controlled, the label type is **Generic**.

> The **Suppress Print Messages** check box in Employee Maintenance designates if Kinetic should suppress to display PCID generation print messages when the associated employee uses PCID-related apps. If selected, Kinetic automatically sends the generated PCID labels to the assigned printer.

In this article, we will cover generating a partial PCID.

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Partial PCID**.

2. Select the **Job** that produces the partial container of parts. The **Opr**, **Part**, and **Part Rev** fields default the values from the selected job.

3. In the **Shift** field, specify the shift during which you will generate the PCID.

4. You can select the **Customer** and the **Ship To** (if any) for the parts produced from the selected job.

5. In the **Qty Per Container** field, specify the quantity of parts for the PCID.

6. You can use the **Printer** field to specify the printer that prints the partial PCID. The default value is the printer you associate with the package control transaction **PKG-PAR** in Transaction Routing Maintenance.

7. Select **Generate PCID** to start the generation process.

8. The panel displays with the generated PCID number. If you haven't enabled auto printing, the application will also ask you whether you want to print the PCID label.

⑦ Question

PCID(s) IND101 have been generated. Print Now?

Yes   No

9. Select **Yes** if you want Kinetic to immediately send the PCID label to the assigned printer.

Generating PCID for a Final Job Operation

As a member of the production department at a site that utilizes the Package Control functionality, you need the ability to print a PCID for the items you produce from a job. You can do it in **Job Output by PCID**.

After you generate and print the PCID, you can then place this PCID on the container that holds the goods produced from the job. You can then receive this PCID into inventory through **Job Receipt to Inventory by PCID**.

You can access **Job Output by PCID** from both Kinetic and Data Collection. To access this app from Data Collection, an employee must be set as a Material Handler in Employee Maintenance.

> The **Suppress Print Messages** check box in Employee Maintenancedesignates if Kinetic should suppress to display PCID generation print messages when the associated employee uses PCID-related apps. If selected, Kinetic automatically sends the generated PCID labels to the assigned printer.

In this article, we will cover:

- [Generating a PCID for a job](#)

- [Consuming partial PCIDs](#)

Generating a PCID for a Job

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Job Output By PCID**.

2. On the **Jobs in Process** card, review ongoing jobs and their final operations.

3. Review the **Pkg Code Qty** that populates based on the job and operations loaded. You can also see the **Job Qty Completed** for the jobs.

4. Select the job for which you want to generate a PCID.

5. Select the **Package Code** button to select the package code for the PCID.

6. Select the **Generate PCID** button to start the generation process.

   A PCID that you generate from this app is a Staged PCID. This means that Kinetic keeps it in the staging tables. You later need to reconcile it with inventory through **Job Receipt to Inventory by PCID**. After you reconcile with inventory, the PCID moves from the staging tables to the standard inventory PCID tables.

   When you generate a PCID, this updates the status of the PCID to **WIPFG**. If the PCID that generates is label print controlled, the label status updates to **WIP**. Additionally, when you generate the PCID, this updates information for the employee record and the job operation records. The PCID record populates with the default WIP warehouse and the default bin information.

   If there is no defined package code, if the printer ID is blank, or if you printed the label within 60 seconds, the application errors and does not generate the PCID.

> ℹ️ When generating PCIDs, if the time between generating PCIDs is less than the defined Minimum Job Output Generate Interval, an error displays when you try to generate the second PCID. You define the minimum job output generate interval for a site in the **Minimum Job Output Generate Interval** field in Site Configuration Control.

7. The panel displays with the generated PCID number. If you haven't enabled auto printing, the application will also ask you whether you want to print the PCID label.

   If you enabled auto printing, the app automatically sends the PCID label to the printer associated with the selected job.

8. Select the **Reprint PCID** button to reprint the last label that you printed for the selected job.

> ℹ️ If you attempt to reprint a PCID later than the maximum job output reprint window, you will receive an error message. You define the number of minutes you can reprint a PCID after its generation in the **Maximum Job Output Reprint Window** field for a site in Site Configuration Control.

9. Select **Save**. 💾

Consuming Partial PCIDs

You can also add and consume previously created partial PCIDs to the PCID you intend to generate. Partial PCIDs are PCIDs that contain items that you complete from a job, but do not produce enough to create a full container. This means that you can take a partial PCID and move the items into the PCID you intend to generate to give you a full container.

1. On the **Partials** card, select **Retrieve**.

2. Once Kinetic retrieves the available partial PCIDs, you can select any of them for the items that match the selected jobs to consume with the PCID you intend to generate.

3. Select **Generate PCID**.

4. The panel displays with the generated PCID number. If you haven't enabled auto printing, the application will also ask you whether you want to print the PCID label. Otherwise, the app automatically sends the PCID label to the printer associated with the selected job.

Generating Ad Hoc PCIDs

In **Ad Hoc PCID**, you can generate a PCID for a situation that does not fit into another standard label printing process.

Ad Hoc PCID is a backup application in which you can create one or more labels for a miscellaneous purpose. You can use these labels for situations outside of producing directly to a PCID. For example, you can use this app to print a label for a job that is not in its final operation. These PCIDs automatically show up in inventory as a standard inventory PCID and do not process through **Job Receipt to Inventory**. This means that you must enter the warehouse and the bin where the PCID is located within the inventory.

When you generate a PCID from the **Ad Hoc PCID** app, Kinetic creates a Package Control header record and a Package Control items record. It also sets the status of the PCID to **STOCK**.

The transaction type that you generate when you create a PCID from this app is the **PKG-ADH** transaction type.

> ⓘ The **Suppress Print Messages** check box in Employee Maintenance designates if Kinetic should suppress to display PCID generation print messages when the associated employee uses PCID-related apps. If selected, Kinetic automatically sends the generated PCID labels to the assigned printer.

In this article, we will cover creating an Ad Hoc PCID.

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Ad Hoc PCID**.

2. Select the **Customer** and the **Ship To** (if any) to associate with the PCID.

3. Enter or select the **Customer Part** number for the parts in the PCID.

4. In the **Shift** field, specify the shift during which you will generate the PCID.

5. Select the **Package Code** button to switch between package codes and select the one you need.

6. In the **Qty Per Container** field, specify the quantity of parts for the PCID.

7. Enter the number of PCID labels you want to generate in the **Number To Generate** field.

8. Assign a printer to print out the generated PCID labels in the **Printer ID** field. The default printer is the printer that you associate to the package control transaction **PKG-ADH** in Transaction Routing Maintenance.

9. In the **Warehouse** field, specify the warehouse in which the PCID you intend to generate is located. The selected warehouse determines the physical location of the PCID. Since the PCID that you generate is a standard inventory PCID, you must assign the PCID a warehouse location.

10. In the **Bin** field, select a bin that specifies the physical location of the PCID you intend to generate. This bin describes the location within the selected warehouse where the PCID is located. Since the PCID you generate is a standard inventory PCID, you must select a valid bin within the warehouse associated with the PCID.

11. Select the **Staged Inventory** check box if you want to generate a staged PCID. The **Warehouse** and **Bin** fields disable in this case.

12. Select the **Generate PCID** button to start the PCID generation process. Kinetic determines the PCID by the highest order match to combinations entered in Package Control Label Type Maintenance. Kinetic determines the PCID by customer, part number, and ship to IDs. Once Kinetic determines the highest order match, you can then generate the PCID based on the Package Control ID Code associated with that label type.

Ad Hoc PCID

Package Code   **Generate PCID**   **...**

Detail

Customer

Customer	IMC
Customer Name	International Machine Co
Ship To	
Ship To Name	International Machine Co

Customer Part

Customer Part	SSSPICD
Customer Rev	SPREV
Part	SPICD Pa...
PO Number	
Job Date	11/30/2021
Shift	2

Container Details

Package Code	BOX
Ship To Container Part ID	IMC-BOX
Container UOM	EA
Our Supplier Code	IMC-SupCode
Qty Per Container	12.00
Number To Generate	1
Printer	Monterrey A4

Warehouse/Bin

Warehouse	Main
Bin	00-00-00
Bin Description	00-00-00
☐ Staged Inventory	

13. The panel displays with the generated PCID number(s). If you haven't enabled auto printing, the application will also ask you whether you want to print the PCID label(s).

14. Select **Yes** if you want Kinetic to immediately send the PCID label(s) to the assigned printer.

Building/Splitting/Merging PCIDs

You can build PCIDs that contain parts, or parent PCIDs that contain child PCIDs, merge two or more PCIDs into a single PCID, nest PCIDs into another PCID or split parts from a PCID and add them to another PCID in **PCID Build/Split/Merge**. You can also return parts in a PCID to inventory.

PCID0045 contains two pallets. Each pallet contains 50 parts. If you want to split the PCID, you can move the entire PCID to another PCID or to stock. You can also move parts of the PCID contents,

such as a pallet or a group of parts, to another PCID or to stock.

In PCID Build/Split/Merge, you can build, split or merge the contents of PCIDs to and from other PCIDs to and from inventory.

- On the **PCID Build/Split/Merge** tab, you can build, split or merge contents to and from PCIDs. You can build PCIDs and add parts and child PCIDs to it. You can move parts and child PCIDs from one PCID to another PCID. You can also remove parts or child PCIDs from another PCID.

- On the **To/From Inventory** tab, you can add or remove PCID contents to and from inventory. You can remove parts from stock and add them to a PCID. You can remove parts from a PCID to inventory as individual parts. You can also remove a child PCID from a parent PCID and return it to inventory.

> ℹ️ The parts you want to move do not need to have the same part number. You can also move serial or lot tracked parts into a PCID.

In this article, we will cover building and generating a PCID for the a material part.

1. From the main menu, navigate to **Material Management > Advanced Material Management > General Operations > PCID Build / Split / Merge**.

2. Navigate to the **To / From Inventory** card.

   Here you can add or remove PCID contents to and from inventory. You can remove parts from stock and add them to a PCID. You can remove parts from a PCID to inventory as individual parts. You can also remove a child PCID from a parent PCID and return it to inventory.

3. Verify that **Main** is selected in the **Warehouse** field.

4. Enter or select the part to be moved to the destination PCID in the **Source Part** field.

5. Select the warehouse **Bin** where the source part is stored. You can only select or enter bin numbers associated with the specified warehouse number.

   The Available Quantity and On Hand Quantity fields should display the quantity.

6. Enter the **Quantity** of the part to move into the destination PCID.

^ **PCID Build / Split / Merge**

Warehouse
Main

Build / Split / Merge PCIDs   To / From Inventory

^ **Source Part**   **Add Part to Destination PCID**   Serial Numbers...

Part
00C1

Attribute Set

Bin
01-01-02

Lot Number

Quantity
3   EA

7. In the **Destination PCID** pane, select the **Generate PCIDs** button.

The Package Control ID Generator launches.

8. Select the appropriate **Package Control ID Code**.

> ℹ The Package Code field populates based on the selected package control ID. The Part field value comes from the associated transaction and is view only.

> ℹ If you generate PCIDs through Material Request Queue, Label Print Controlled PCIDs are excluded from the PCID search results.

9. In the **Warehouse** field, select **Main**.

10. Enter the number of PCIDs you want to generate. For example, if you want to generate nine new PCIDs, you enter 9 in the **Number of PCIDs to Generate** field.

11. The **Print Labels** check box indicates if a PCID label will print on the selected printer when you generate the PCID.

12. Select **Generate PCIDs**.

    The Package Control ID Generator closes and the Destination PCID is populated with information for the generated label. The Status for the label is Empty

13. In the **Destination PCID** pane, enter the **Bin**.

14. In the **To/From Inventory** tab, select **Add Part to Destination PCID**.

The part now appears in the PCID Contents list for the destination PCID and the Item Qty field populates the value you entered. The **Status** for the destination label changes from **Empty** to **Stock**.

15. Select **Save**.

Maintaining Package Control Label Values

In **Package Control Label Value Maintenance**, you view, modify, or delete existing Package Control ID (PCID) label values stored in the PkgControlLabelValue and PkgControlLabelValueImport tables. You can also use it to manually create new PCID label value records in these tables for a specific customer, ship to identifier and part number.

Kinetic initially creates, and later updates PCID label values stored in these tables after the **Import EDI Demand Process** fully processes an inbound EDI transaction file that contains a Package Control (PC) type row, or when you correct any error conditions preventing import of the inbound EDI transaction file and the **Demand Workbench** successfully processes the file.

```
H~1~0~DALTON~FIRM~EPIC03~DALTON-CONTRACT~DALTON~~E100500-51~~P1~false~~~~~BEST~~~false~Order Comm~Inv Comm~false~false~~~~false~false~
false~1~1~13-03~~false~~~~~~~~~~~~~false~false~Custom1~~~~~~~~~Custom10~

UD~2~1~~~~~~~~~~~~~Head_E10_Character01~~~~~~~~~Head_E10_Character10~0101~~~~~~~~~~~~~~~~~2020~20130909~20130910~~~~~~~~~~~~~~~~~~
20131231~false~~~~~~~~~~~~~~~~~~~true~ShortChar01~~~~~~~~~ShortChar10~

EC~3~1~FRGT~Freight~E~A~~200~Custom1~~~~~~~~~Custom10~

D~4~1~E100500-51~0001~~FIRM~false~~~~1032x050~~CUST1032X050~~~EA~~10.00~true~E~~~~~~false~~~~~~~~~~~Custom1~~~~~~~~~Custom10~

UD~5~4~~~~~~~~~~~~~Detail_E10_Character01~~~~~~~~~Detail_E10_Character10~0101~~~~~~~~~~~~~~~~~2020~20131029~20131030~~~~~~~~~~~~~~~~~~
20131231~true~~~~~~~~~~~~~~~~~~~false~ShortChar01~~~~~~~~~ShortChar10~

EC~6~4~SPEC~Special Handling~F~P~5~~Custom1~~~~~~~~~Custom10~

SCH~7~4~~FIRM~E100500-51-0001-001~10~EA~false~~P1~false~~~~~false~BEST~20110515~20110501~~~false~false~~~~~~~~~~~~~~~~~false~~false~~~~
~~~~~~~~Custom1~~~~~~~~~Custom10~

UD~8~7~~~~~~~~~~~~~Schedule_E10_Character01~~~~~~~~~Schedule_E10_Character10~0101~~~~~~~~~~~~~~~~~2020~20130929~20130930~~~~~~~~~~~~~~~
~~~~20131231~true~~~~~~~~~~~~~~~~~~false~ShortChar01~~~~~~~~~ShortChar10~

SCH~9~4~~FIRM~E100500-51-0001-002~20~EA~false~~P1~false~~~~~false~BEST~20130615~20130611~~~false~false~~~~~~~~~~~~~~~~~false~~false~~~~
~~~~~~~~Custom1~~~~~~~~~Custom10~

SCH~10~4~~UNFIRM~E100500-51-0001-003~50~EA~false~~P1~false~~~~~false~BEST~20130915~20130911~~~false~false~~~~~~~~~~~~~~~~~false~~false
~~~~~~~~~~~~Custom1~~~~~~~~~Custom10~

D~11~1~E100500-51~0002~~FIRM~false~~~~1032x100~~CUST1032X100~~~EA~~11.75~true~E~~~~~~false~~~~~~~~~~~Custom1~~~~~~~~~Custom10~

SCH~12~11~~FIRM~E100500-51-0002-001~60~EA~false~~~false~~~~~false~BEST~20131015~20131001~~~false~false~~~~~~Dalton OTS~600 Main Rd~~~
Miami~Florida~64460~USA~~~234-12121~Jerry~false~~false~~~~~~~~~~~Custom1~~~~~~~~~Custom10~

SS~13~13~~CVR1 23.00 Delrin true 23.00 Silver 234~

PC~14~1~MfgSys~DALTON~P1~1032x050~CustomLabel1~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~CustomLabel30~
```

The PCID labeling values stored in the PkgControlLabelValue and PkgControlLabelValueImport tables reflect customer-specific PCID labeling requirements for shipping transactions that are generated for the items they ordered on the inbound EDI transaction file. When you process demand, Kinetic copies the values stored in the tables, pairs them with demand records for the specified customer/ship to/part number, and uses them to associate PCID label values with shipping transactions generated for the ordered items. This labels each shipping transaction with the appropriate PCID numbers requested on the inbound EDI transaction file.

Use the landing page of the application to view existing package control label value records, or to manually enter a new one.

In this article, we will cover:

- Updating existing PCID label values

- Adding a new PCID label value record

Updating Existing PCID Label Values

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Package Control Label Values**.

2. Select the existing package control label value record stored in the PkgControlLabelValue and PkgControlLabelValueImport tables that you want to modify.

3. On the **Label Values** card, edit or delete specific PCID label values as needed.

4. Select **Save**. 💾

Adding a New PCID Label Value Record

1. Select **New** ⊕ to manually add a new PCID label value record.

2. In the **Customer** field, enter or search for an existing customer. The PCID label values that you create will display for this customer.

3. In the **Ship To** field, select an existing customer ship to number (if any). You can leave the field blank if you are using the address for the associated customer as the ship to address.

4. In the **Part** field, enter an existing part number for which you want to display the PCID label values.

5. On the **Label Values** card, enter up to 30 label values.

6. Select **Save**. 📀

Moving Materials to the Other Locations

Suppose you need to change the stock location of your part or material. The **Move Material** program lets you move material issued to one job along to another warehouse/bin location. Using the application, you can also assign serial numbers for the moved materials.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

In this article, we will cover:

- Moving Materials to the Other Locations

- Assigning Serial Numbers

Moving Materials to Another Locations

1. From the main menu, navigate to **Material Management > Advanced Material Management > General Operations > Move Material**.

2. Select the job search button to select the job.

3. Select assembly and material from the drop-down in the **From** section.

4. Select the required bin in the **Bin** search field.

5. Specify the quantity and the reference in the **To** section.

6. Select **Save**. 🖫

Assigning Serial Numbers

If you need to assign the serial numbers to the materials you move, use the **Serial Numbers** button or select the **Serial Numbers** from the Overflow menu.

> ℹ️ The **Serial Numbers** button is active when you select **Record Serial Numbers on Inventory Move** check box in the **Site Configuration** program.

To assign serial numbers:

1. Select the serial matched material from the drop-down.

   > ℹ️ To learn more about serial-matching function, review the **Using Serial Matching Maintenance** article.

2. Enter the required quantity in the **To** section.

3. Select the warehouse and the bin.

4. Select the **Serial Numbers** button or the Serial Numbers from the Overflow menu. The **Select Serial Numbers** panel displays.

5. On the **Select** card, select **Retrieve All** from the Overflow menu to show the available serial numbers for assignment.

6. Select **OK**.

Overlaying PCIDs

Let's say you are a part of the materials or production department at a site that utilizes the Package Control functionality. Due to repack reasons, or if a customer number, customer part number, ship to, customer container code codes change for an existing PCID, you may need to create a replacement PCID.

You can do it in **Overlay PCID**. In this app, you can generate a replacement PCID that you will overlay on an existing PCID or place on a repack container. This is especially important for automotive industries, where all information contained within the label must be accurate.

When you use **Overlay PCID**, you can determine the customer, ship to locations, part, customer part numbers, and so on to ensure the information for the PCID accurate. You can also enter the quantity of items contained within the PCID, the number of labels to generate, and the printer from which you want to print a label.

When you generate a PCID from this app, you generate a Staged PCID. This means you generate the PCID label but have yet to associate the specific inventory currently in the warehouse with the PCID. To do so, you need to reconcile the PCID label with the physical inventory through **Overlay PCID Label Validate** and **Repack/Reclass by PCID** (Data Collection).

When you generate the PCID, this updates the status of the PCID to **WIPFG**. If the PCID that generates is Label Print Controlled, the status updates to **WIP**. Additionally, when you generate the PCID this updates information for the employee record and the job operation records. The PCID record populates with the default WIP warehouse and the default bin information.

If there is no defined package code, if the printer ID is blank, or if you printed the label within 60 seconds, the application errors and does not generate the PCID.

The transaction type that you generate when you create a PCID from this app is the **PKG-OLY** transaction type.

> ⓘ The **Suppress Print Messages** check box inEmployee Maintenance designates if Kinetic should suppress to display PCID generation print messages when the associated employee uses PCID-related apps. If selected, Kinetic automatically sends the generated PCID labels to the assigned printer.

After you create your label, you can then use the **Overlay PCID Label Validate** (Data Collection) app to validate the existing PCID and the replacement PCID that will overlay the existing PCID.

In this article, we will cover generating a replacement PCID to overlay an existing one.

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Overlay PCID**.

2. Select the **Customer** and the **Ship To** (if any) associated with the parts contained within the original PCID.

3. Enter or select the **Customer Part** number for the parts contained within the original PCID.

4. In the **Shift** field, specify the shift during which you will generate the PCID.

5. Select the **Package Code** button to switch between package codes and select the one you need.

6. Enter the **Source PCID** that determines the original PCID that you intend to replace or repack.

> ℹ️ To select or search for a Source PCID, it must have a Package Control Type of **Dynamic**.

7. Enter the **Qty Per Container** to specify the quantity of parts for the replacement or repack PCIDs.

8. Enter the number of PCID labels you want to generate in the **Number To Generate** field.

9. Assign a printer to print out the generated PCID labels. The **Printer ID** defaults from the printer you assign to the transaction PKG-OLY.

10. Select the **Generate PCID** button to start generation process.

11. The panel displays with the generated PCID number(s). If you haven't enabled auto printing, the application will also ask you whether you want to print the PCID label(s).

Question

PCID(s) IND102,IND103 have been generated. Print Now?

[Yes] [No]

12. Select **Yes** if you want Kinetic to immediately send the PCID label(s) to the assigned printer.

Generating a PCID for a Job on the Fly

What if the job has already started, but your internet goes down and you need to create a PCID label for this job on the fly. In this case, you can use **Ad Hoc Job Output by PCID** to generate ad hoc PCIDs for this job that is in progress, but not in it's final operation.

This app is available in both Data Collection and Kinetic. You can use this app to select the Job and Operation for which you need to generate the PCID. You can also determine the customer part

number and customer ID for the PCID. This is especially important for companies within automotive industries where labeling is tightly regulated. For other jobs you can use **Job Output by PCID** to generate PCIDs.

> ℹ️ You can only generate ad hoc PCIDs for jobs scheduled to start within the date range window. If you attempt to create one for a job scheduled to start earlier or later than the set date range window, an error message displays. The date range window is the number of days before and after the current date. You define the maximum ad hoc PCID job window for a site in the **Maximum Ad Hoc Job Output Window** field in Site Configuration Control.

When you generate a PCID from this app, you generate a Staged PCID. This means you generate the PCID label but have yet to associate the specific inventory currently in the warehouse with the PCID. To do so, you need to reconcile the PCID label with the inventory. You can reconcile the staged PCID with the inventory, and move the PCID form the staging tables to the standard inventory tables through **Job Receipt to Inventory by PCID**.

When you generate the PCID, this creates the PCID header and item records in the staging tables. Additionally, it updates the PCID status to **WIPFG** and, if the PCID is label print controlled, it updates the label status to **WIP**. The transaction type that you generate when you create a PCID from this application is the **PKG-AJO** transaction type.

> ℹ️ The **Suppress Print Messages** check box in Employee Maintenance designates if Kinetic should suppress to display PCID generation print messages when the associated employee uses PCID-related apps. If selected, Kinetic automatically sends the generated PCID labels to the assigned printer.

In this article, we will cover generating a PCID for a job on the fly.

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Ad Hoc Job Output by PCID**.

2. Select the job number in the **Job** field. This is the job that produces the parts you need to associate with a PCID.

3. In the **Shift** field, specify the shift during which you will generate the PCID for the selected job. The default value is the current shift. Kinetic determines the default shift by the current time.

4. Optionally, select the **Customer** to associate with the PCID. This is the customer that will receive the items you are producing.

5. Select the **Package Code** button to switch between package codes and select the one that suits you better.

6. Enter the number of PCID labels you want to generate for the current job in the **Number To Generate** field.

7. Assign a **Printer** that will print out the PCID labels.

8. Select the **Generate PCID** button to start the PCID generation process.

    The process generates a PCID that is determined by the highest order match to combinations entered in [Package Control Label Type Maintenance](). The PCID that prints is determined by customer, part number, and ship to IDs. Once Kinetic determines the highest order match, you can then generate the PCID based on the Package Control ID Code associated with that label type.

9. The panel displays with the generated PCID number(s). If you haven't enabled auto printing, the application will also ask you whether you want to print the PCID label(s).

⑦ Question

PCID(s) IND101 have been generated. Print Now?

Yes   No

10. Select **Yes** if you want Kinetic to immediately send the PCID label(s) to the assigned printer.

Transferring WIP Items to Inventory by PCID

After a job completes, you as a member of the quality or production department need to transfer items from a Work-in-Progress status into inventory with a PCID (Package Control Identifier). You can use **Job Receipt to Inventory by PCID** available in Data Collection or standard Kinetic to transfer any items you create from a job into a warehouse that you identified as a Stock or Quality type, with use of a PCID. You can scan or enter static or dynamic PCIDs to transfer the items

produced from the job. You can use this app to determine the warehouse that will receive the items produced from the job and can select the PCID in which you place the items produced from the job.

> ℹ️ To use this app in Data Collection, you must be a **Material Handler**.

When you receive the items into your inventory, the following PCID and label status updates occur for the **MFG-STK** transaction type:

- **Static**: Empty to STOCK or INSPECT
- **Dynamic**: WIPFG to STOCK or INSPECT
- **Label Print Controlled**: WIPFG to STOCK or INSPECT

When you receive the items into inventory, several events occur.

- Kinetic updates the on-hand quantity for the part in the part master file, and updates the costs.
- Kinetic creates a transaction history record with the reference for the part. These are the same outcomes as with Job Receipt to Inventory. With the PCID, when you receive inventory the items records, warehouse, bin locations are associated with the PCID.
- Kinetic updates the PCID record both at the header and at the item levels to include these new values.
- If you use a returnable container, this process creates an inventory adjustment for the internal part record.

The inventory from the job becomes available based on the setting on the **Enforce Job Receipt to Inventory** check box in Site Configuration Control. When you clear this check box, this indicates that Kinetic should increment the inventory and put a move on the queue from WIP to inventory (the inventory is available immediately). If you select this check box, this means that you increase the on-hand quantities only after you complete the putaway move. This means that the inventory is not available until you move it to an inventory bin.

Use the landing page of the application to view existing warehouses which you identified as Stock or Quality type in Warehouse Maintenance.

In this article, we will cover transferring items from a Work-in-Progress status into inventory with a PCID.

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Job Receipt to Inventory by PCID**.

2. Select the **Warehouse** where you want to receive a PCID.

3. In the **Bin** field, select the specific bin in the selected warehouse where you want to receive the PCID into inventory.

4. In the **PCID** field, search for and select the staged PCID you want to receive into inventory. These are PCIDs you typically produce from Job Output by PCID. After you select the PCID, the information for the PCID defaults into the fields such as **Control Type**, **PCID Status**, **Part**, and **Revision**.

5. Select **Save**. 🖫

This initiates the move into inventory. The selected PCID moves from the staging tables into the standard inventory tables and becomes reconciled with the physical inventory.

6. If your company uses legal numbers for job receipts to inventory and the generation type is Manual, a **Legal Number** prompt displays. Enter the legal number for the job receipt and select **OK**.

If the legal number generation type is Automatic, the legal number automatically generates when you save.

ⓘ Information

The Quantity exceeds the quantity completed for the job: 2425

The generated legal number is 2021-JC-00000005.

Ok

> ⓘ To generate legal numbers for job receipts to inventory by PCID, you must define a legal number format in Legal Number Maintenance and select at least one WIP to Stock transaction document type.

7. To display a list of previously entered inventory transactions, select **Transaction Log** from the Overflow menu ••• .

8. Select **OK**.

Moving Work-in-Progress Part from One Job to Another

You use the **Move WIP** application to move a work in progress (WIP) part from one job operation to another. When you use **Move WIP**, it updates the PartWIP table, and if the job contains a serial tracked part, the application updates the serial number and serial tracing tables to reflect the newly assigned operation.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

In this article, we will cover moving work-in-progress part from one job to another.

1. From the main menu, navigate to **Material Management > Advanced Material Management > General Operations > Move WIP**.

2. Select the job number where you want to move the part.

3. In the **To** section, specify the quantity of the moved material.

4. Specify the warehouse to which the material is being moved.

5. Define the operation to which the material is being moved. The default for this field is for the operation number previously entered into the **To Opr** field.

6. Select **Save**.

Adjusting Material

In **Adjust Material**, you adjust the physical location or quantity of a material. You only run this app when a material quantity record specifies one physical location, but its actual location is different.

⚠️   The transaction for **Adjust Material** is of type **ADJ-MTL**.

Use the landing page of the application to view existing jobs.

In this article, we will cover adjusting material to a job.

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Adjust Material**.

2. Select the **Job** with the material being adjusted.

3. Enter the job **Assembly**, and specify the **Material** to be adjusted.

4. Note, the **Warehouse** and **Bin** fields display the warehouse bin that contains the quantity being changed. If you need, you can select different warehouse and bin.

5. Specify the **Part** that you want to adjust to the job. The field defaults with part number associated with the job material sequence. If you want, you can change it.

6. Enter the **Quantity to Issue**.

7. Specify the date for the quantity adjustment in the **Issue Date** field.

8. If you want to assign the total quantity of the material to the job, select the **Issued Complete** check box.

9. Select **Save**.

Updating and Reviewing Package IDs

Package control is one of the core features in Material management. When shipping the packages to the warehouse, an Inventory manager generates PCID labels for the pallets. This way, all the pallets are uniquely identified. As shipment of product arrives and is

unloaded to a shipping dock, a warehouse worker with a handheld receives to the PCID everything that represents the pallet. Then the pallet is moved into the warehouse for storage.

With the **Package Control ID Maintenance**, you can modify and update PCIDs for the packages, view activities, packaging, labels, and customer container information for a PCID. You can also review the current status, prior status, and labeling specifications for a PCID. If a label is associated with a PCID, you can track the label's current status and attributes.

> To create a PCID, use **Control ID Maintenance** to define the available Control IDs at the company level, and **Package Control ID Configuration** to assign a portion of the ranges of the Control IDs at the site level and define their attributes.

> Package Control ID Maintenance is only available if you install the **Advanced Material Management** license.

Use the landing page of the application to view existing package IDs.

In this article, we will cover:

- Reviewing PCID Details
- Viewing PCID Items
- Reviewing Packaging Details
- Viewing Specific PCID Label Values
- Tracking Shipment Locations
- Displaying Customer Container Information
- Viewing Serial Tracked PCIDs

Reviewing PCID Details

The **PCID** card helps you review and maintain PCID records.

Here you can access the **PCID** and **Activities** cards.

> You cannot use this program to create or delete PCID. This means that fields, such as Control Type, Control ID Code, Child PCID Count, and Shipment Pack ID are display only fields.

To access the PCID details:

1. Open the **Package Control ID** app.

    The **Landing** page displays.

2. In the **PCID** field, enter the PCID number and press **Tab**.

    Using the 'PCID' field, you can also search for and select the PCID you need of you can select it directly from the grid.

    The **PCID** card displays.

3. View the current location of a PCID, its current and prior status, the selected PCID's settings, the label settings, and repack and overlay activity.

    For example, if the 'PCID' is tied to stock, the 'PCID Status' field displays the 'STOCK' status.

If the selected 'PCID' is a 'WIP PCID' then the 'PCID Status' field displays the 'WIP' status.

> ℹ️ To learn about the 'WIP PCID' review the [Working with PCIDs and WIP](#) article and its related articles.

> ℹ️ To use the 'WIP PCID' feature, you need to install the 'Advanced Material Management' (AMM) license.

4. To review the **Activity** details expand the **Activity** card.

Here you can view the recent activity and label information for a source or target PCID.

If a PCID is Label Print Controlled, you can use this card to view any label related information. If you select this check box in Package Control ID Configuration, you indicate that the rules for the labels also apply when you process the selected PCID. The label has its own rules, based upon the state of the PCID and what is in the PCID, that determines the transactions you can place against a PCID. These label rules are also the rules that determine when and how to overlay labels and reprint labels. This concept is especially important for the automotive industries where you tightly control label rules. You can use this sheet to view the label type, the date created, and who created the label.

Viewing PCID Items

Expand the **Items** card to view child PCIDs and parts associated with the PCID selected on the **PCID > PCID** card. You can use the Items sheet to view the specific sales order numbers, job numbers, transfer orders, and pack numbers associated with a PCID. You can also view a part and the pack ID associated with the child PCID. Additionally, you can view the demand, purchase orders, RMA, and receipts related to the child PCIDs and parts contained within the selected PCID. To view the different PCIDs and parts contained within the PCID, use the tree view to browse through the items for the PCID.

Reviewing Packaging Details

Use the **Packaging** card to view the package code associated with the selected PCID and modify package attributes.

> ℹ️ You cannot create or delete package codes in this program. You can also not add a package code to your selected PCID. You can only view and adjust certain attributes on this card. To create a package code, use **Package Code Maintenance**. Use **Package Code Maintenance** to create the dimensions, weights, volumes, and attributes for a package code. To associate a package code with a PCID, use **Package Control ID Configuration**. You use **Package Control ID Configuration** to assign a package code to either static or dynamic PCIDs at the site level.

Viewing Specific PCID Label Values

Expand the **Label Values** card to view specific the label values contained within a selected PCID.

You create these label values through EDI transmissions; these EDI transmissions detail the specific labeling requirements including the number of labels and label text. Upon receipt and processing of this inbound EDI transmission, you can create, modify, or delete these label values in **Package Code Label Value Maintenance**. You can then use these label values for shipping transactions generated for the customer.

Tracking Shipment Locations

Use the **Locations** card to view Ship To, Supplier, or Site details associated for a selected PCID.

The information that displays for the selected PCID is based on the direction of movement of the PCID. A PCID moving in an inward direction, a PCID you receive, displays its information on the Supplier sheet. The Site sheet displays the information for a PCIDs current site location for a PCID that has yet to ship to a customer or as part of a transfer order. A PCID moving in an outward direction, a PCID you ship, displays its information on the Ship To card.

In this section, we will cover:

- [Reviewing Ship To Details](#)

- [Displaying Information About Suppliers](#)

- [Viewing Site Details](#)

Reviewing Ship To Details

On the **Ship To** card, view information for a PCID that you ship to a customer.

The **Ship To** card displays information for a PCID that you move in an outwards direction; a PCID you ship from your site to a customer. This information includes the name, address, and other generic address information. This sheet also includes EDI Ship To numbers, Ship To docks, and Ship To Container IDs. However, if a customer changes the Ship To address and subsequently requires a new label, you can use this sheet to modify those address values.

Displaying Information About Suppliers

Expand the **Supplier** card to view information for a selected PCID that you receive.

The Supplier card displays information for a PCID that moves in an inwards direction, a PCID you receive to your site from a supplier. The information available includes the supplier ID, purchase point, and the supplier's address.

^ Supplier	
Supplier	
Supplier Number 0	Address Line 1 Canberra, Northern st.1
Supplier ID	Address Line 2
Purchase Point	Address Line 3
Country None Selected	City State Postal Code

Viewing Site Details

Use the **Site** card to view information for the site where the PCID exists and from where it ships.

The **Site** card displays information for PCIDs that includes the current site location, the site from where a PCID ships. View PCIDs that have yet to ship to a customer or for PCIDs invovled in transfer orders. The information on the card ncludes your company's site name and the physical address of that site.

^ Site	
Site	
Site Name Main	Address Line 1 Northern st. 1
Country None Selected	Address Line 2
Phone	Address Line 3
	City State Postal Code

Displaying Customer Container Information

On the **Customer Container Info** card, you can view information for specific customer part numbers contained within a selected PCID.

It contains the information for a customer's part number, the quantity per container, and the number of containers.

^ Customer Container Info		
Customer Part Number	Quantity Per Container	Number of Containers
No records available.		

Viewing Serial Tracked PCIDs

Expand the **Serial Numbers** card to view information for serial numbers associated with the selected PCID.

You can view the part number and its description for the specific serial number in the grid.

By selecting ⊕ you can add new serial number for the specific part.

Unpicking Transfer Orders

Return material to stock after you pick them for a transfer order or transfer order line in the **Unpick Transfer Order** app. You might need to do this if you decided to cancel a transfer order or order line after picking or if you need to relocate the material to another order. To return picked material to its appropriate warehouse and bin, begin by entering or scanning the transfer order/line number.

When you unpick material for an individual order line, enter a specific order line number into the **Line** field. If you do not know it, you can scan or enter the part. The warehouse and bin locations default to those from which you initially picked the parts. However, you can choose the part's quantity to return to stock and specify the warehouse and bin where it should be returned, though the list of available bins only includes those ones that hold this part.

1. Open the **Unpick Transfer Order** app.

2. Search for and select **PCID** and **Transfer Order**.

> i   You do not have to use the 'PCID' feature if the transfer order items are not tied to a 'PCID'.

3. Search for and select a transfer order line.

4. The **Part** field displays the part number you are unpicking.

5. This is the **warehouse** and **bin** from which the part was picked.

6. In the **To** group box, select the **warehouse** and **bin**to which you are returning the unpicked parts.

7. In the **Unpick Qty** field, enter the quantity that must be unpicked from the transfer order.

8. Select **Save**.

9. Exit the Unpick Transfer Order app.

Using Material Queue Manager

Material Queue Manager helps you manage and manipulate queued material transactions, including pick transactions generated when order items are allocated using selections on the Fulfillment Workbench Actions menu.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

You can perform the following tasks for single queued transactions, or groups of selected transactions:

- Change priorities on transactions, moving them up or down in order of importance.
- Place transactions on hold to prevent workers equipped with handheld devices from processing them. Conversely, on hold transactions can also be released for handheld device processing.
- Clear or change user and warehouse team assignments for selected transactions.

Once you select transactions and make the required changes, the application requires you confirm the changes before saving them. The Material Queue Manager locks transactions you are working with to prevent them from being changed by other users, and conversely, locks transaction records that are currently being modified by other users, or are being displayed on handheld devices. This prevents you from selecting them for processing until they are released by the current user.

In this article, we will cover reviewing the managers queue.

1. From the main menu, navigate to **Material Management > Advanced Material Management > General Operations > Material Queue Manager**.

2. Use the **Filters** card to filter data to improve the performance of the Material Queue Manager when it retrieves and displays material request transactions.

Material Queue Manager

∧ Filters

From Date month/day/year	Transaction Type	From Warehouse
To Date 3/2/2021	Selected Employee	To Warehouse
	☐ Only Unselected	

The following options are available:

- Using the **Material Queue Rows Per Page** field in the **Site Configuration Control > Modules > AMM > Material Queue** card, you can designate the number of data records

that display per page in the Material Queue Manager.

- **From Date / To Date** - Using these fields, you can specify the date range for the material request transactions you wish to select.

- **Transaction Type** - Using this field, you can select the type of transaction you wish to retrieve.

- **From Warehouse / To Warehouse** - Using these fields, you can specify the range of warehouses for which you wish to select material request transactions.

- **Selected Employee** - Using this drop down, you can select material request transactions for a specific employee; if left blank, the Material Queue Manager selects records for all employees.

- **Only Unselected** – If selected, only material request transactions that are unassigned to specific employees are returned. If selected, it clears and disables Select Employee field.

3. On the **Manager's Queue** card, you can manage and manipulate queued material transactions.

Select	Seq	Date	Time	Priority	Part	Attribute Set
☐	1	04/27/2020	10:53:46	1	1032KNUT	
☐	2	04/27/2020	11:06:28	1	1032x075	
☐	3	04/27/2020	11:06:28	1	1032KNUT	
☐	4	04/27/2020	13:58:40	1	CS-87-4578	
☐	332	04/07/2020	13:46:24	9	Server	
☐	366	04/08/2020	10:36:28	1	00C3	
☐	367	04/08/2020	10:56:54	1	0LP2	
☐	370	04/06/2020	18:56:08	1	DCD-100-SP	
☐	375	04/30/2020	15:03:36	1	GL2000	
☐	377	04/27/2020	15:39:55	1	8400S-116	
☐	379	04/27/2020	15:42:34	1	516FW	
☐	380	04/27/2020	15:46:02	1	8400S-116	

To select a single material request, place a check mark in the **Select** column for the desired queued material request line.

> If a Submit for Picking request is sent from Fulfillment Workbench, there are separate material queue records when the allocation includes both inventory and PCID inventory, one for the inventory and one for PCID inventory.

To place selected queued material requests on hold, select **Hold**. When placed on hold, material requests cannot be processed on handheld devices by assigned employees or warehouse teams. After you select material requests and click this button, a HOLD status is assigned to the material requests and appears in the Transaction Status field.

Select the **Release** button to release the selected queued material requests. When released, previously held material requests can processed on handheld devices by assigned employees or warehouse teams. After you select material requests and click this button, a RELEASE status is assigned to the material requests and appears in the Transaction Status field.

To assign a different warehouse/shop floor employee to selected queued material requests, select the **Assign Employee** button. In the Shop Employee Search, select the warehouse/shop floor employee being assigned to the selected material requests.

To clear currently assigned employees or warehouse teams for selected queued material requests, select **Clear Assignment**.

Select **Priority** to change priority codes for selected queued material requests. When the Mtl Queue Priority program appears, select the new priority code (1 - Highest, 9 - Lowest) being assigned to the selected queued material requests, then select **OK**.

4. Select **Save**.

Unpicking Sales Orders

Use the **Unpick Sales Order** app when you need to return material to stock after it has been picked for an order, an order line/release, or into a 'Package Control ID' (PCID). You might do this if an order or order/line/release is canceled after picking or if material needs to be reallocated to another order.

To return picked material to its appropriate warehouse and bin, begin by entering or scanning the PCID or order/line/release number:

- When you enter a PCID into the 'PCID' field, but do not specify an order/line/release number in the 'Order/Line/Release' fields, you return the full quantity for all parts associated with the PCID; it unpicks all associated order lines and releases. The warehouse and bin locations default to those from which the items were picked, which usually is the Shipping Area; however, you can select the warehouse and bin where all the items should be moved. If you are unpicking a specific order/line/release that is not associated with a PCID, you do not have to specify one in the 'PCID' field.

- When you unpick material for an individual order/line/release (that is, you are not unpicking the entire sales order), you must enter a specific order line and release number into the 'Order/Line/Release' fields. If you do not know this information, you can scan or enter the part.

The warehouse and bin locations default to those from which you originally picked the parts, however, you can choose the quantity of the part to return to stock and specify the warehouse and bin where it should be returned, though the list of available bins is limited to those that hold this part.

> ℹ️ When unpicking a specified order/line/release, the 'To Warehouse' and 'Bin' location default to the warehouse and bin from which the items were picked. When unpicking a PCID, the 'To Warehouse' and 'Bin' location default to the warehouse and bin to which the items were picked. The sales order and items remain where they actually are.

In this article, we will cover unpicking a sales order.

1. Open the **Unpick Sales Order** app.

2. Search for and select **PCID** and **Order**.

> ℹ️ When you unpick using a 'PCID', but do not also specify an order/line/release using the 'Order/Line/Release' fields, the entire sales order is unpicked. This

> ℹ️   includes all associated order lines and releases.
>
> However, you do not have to use the 'PCID' feature.

The specific items associated with the 'Static' or 'Dynamic' PCID you select or enter in the 'PCID' field ' are dependent on the following conditions:

- **Static PCID** - The specified static 'PCID' must have a status of 'BUSY' and the associated items must have already been picked. You can only unpick a quantity that is equal to the amount that was originally picked.
- **Dynamic PCID** - The specified dynamic 'PCID' must have a status of 'SOPICK' and the associated items must have already been picked.

If the specified dynamic 'PCID' has the 'PACKED' status (it has been picked, and already packed), the associated order it must be unpacked before you can unpick it. To unpack an order, use the 'Customer Shipment Entry' app and delete the packing number or packing line. After unpacking the order, the 'PCID' status is set to 'SOPICK'. It can then be unpicked using the 'Unpick Sales Orders' app.

> ℹ️   If the 'Void When Emptied' check box is set in the 'Site Configuration' app, then 'PCIDs' with the 'Allow Void' check box selected in the 'Package Control ID Configuration' app are automatically voided when they become empty.

3. In the **Line/Release** fields, enter a line number and release you are unpicking.

4. The **Part** field displays the part number you are unpicking.

> **ℹ** If you do not know the order/line/release numbers, you can alternatively search for and select the part number. If you are returning a 'PCID', a part number does not display because you must return the full quantity for all parts associated with that 'PCID'.

5. This is the **warehouse** and **bin** from which the part was picked.

6. In the **To** group box, select the **warehouse** and **bin** to which you are returning the unpicked parts.

7. In the **Unpick Qty** field, enter the quantity that must be unpicked from the order.

> ℹ The quantify (if any) entered into this field is dependent on the following:
>
> - If you entered a 'PCID' into the 'PCID' field, but did not specify an order/line/release number in the 'Order/Line/Release' fields, the entire picked quantity for all associated order/line/release numbers are automatically returned to stock (unpicked).
> - If you entered a 'PCID' into the 'PCID' field, and specified an order/line/release number in the 'Order/Line/Release' fields, you can enter the quantity that must be unpicked from the order release. You cannot unpick a quantity that is greater than the available quantity. This is also the case if you did not enter a 'PCID' number, but specified an order/line/release number in the 'Order/Line/Release' fields.

8. Select **Save** to unpick the sales order.

9. Exit the Unpick Sales Order app.

Void a dynamic or a static PCID and their associated label information in **Void PCID and Label**.

As a member of the inventory personnel at a site that uses the Package Control functionality, you need the ability to void a PCID and its label and remove the PCID's associated items. After you void a PCID, you can remove all the inventory associated with it. You might choose to do it if, for example, some inventory associated with the PCID has a defect you cannot fix, so you need to scrap it. You can return non-repairable stock back into your inventory and remove the defected stock. However, if you are a part of the automotive industry, the highly regulated labeling rules means you might have to void the entire PCID to return the inventory to stock. Use **Void PCID and Label Maintenance** to void dynamic and static PCIDs and dynamic PCIDs that you marked as label print controlled.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

- You can void a PCID and its label only if you select the **Allow Voids** check box in **Package Control ID Configuration** for a static or dynamic PCID. Additionally, you can't void a PCID with a status of **shipped**, **packed** or **invoiced**.

- When you a void a dynamic PCID and its associated label, this updates the PCID and the label status to VOID. If you void a dynamic PCID that is label print controlled, with a label type that is Individual or Internal and a label status of STOCK, you can also select a reason code that specifies the reasoning behind the void.

- You can void (or void and adjust inventory quantity) a dynamic or static PCID with a status of STOCK, that is not label print controlled.

- You can void a dynamic or static PCID, which is not label print controlled, with a label type of General, if it contains at least one child PCID.

- Additionally, if there are any child PCIDs associated with a parent PCID that you void, they update to STOCK. If the selected PCID is marked to archive the PCID history, then the header and item records copy to the history tables and are removed from the active PCID tables.

- When you void a static PCID, the PCID status updates from **busy** or **empty** to **void**.

In this article, we will cover:

- [Voiding a PCID and Label](#)

- [Voiding a PCID and Adjust Inventory](#)

Voiding a PCID and Label

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Void PCID / Label.**

2. Select the PCID number on the landing page.

3. Enter or search for the PCID number in the **PCID** field.

> ℹ️ If your company uses legal numbers for PCID voids and the generation type is Manual, a Legal Number prompt displays. Enter the legal number for the PCID void and select **OK**. If the legal number generation type is **Automatic**, the legal number automatically generates when you select **Void PCID**.

4. Select the transaction document type from the **Transaction Document Type** drop-down.

5. Select **Void PCID** to adjust the PCID status to Voided.

6. Review the other information if you need.

Voiding a PCID and Adjust Inventory

1. Enter or search for the PCID number in the **PCID** field.

> ℹ️ If your company uses legal numbers for PCID voids and the generation type is Manual, a Legal Number prompt displays. Enter the legal number for the PCID void and select **OK**. If the legal number generation type is **Automatic**, the legal number automatically generates when you select **Void PCID/Inv**.

2. Select the reason for the PCID void and inventory adjustment from the **Reason Code** drop-down.

3. Select the transaction document type from the **Transaction Document Type** drop-down.

4. Select **Void PCID/Inv/WIP** to adjust the PCID status to Voided adjust the inventory quantity.

5. Review the other information if needed.

Returning Salvage Requests

Return Salvage Request Transaction lets you move salvaged parts from a job to stock. You can then process them within the Material Queue. Once processed, the app creates a material transaction that can change the cost, quantity, and/or location of this material.

In this article, we will cover returning salvaged parts.

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Return Salvage Request**.

2. Specify the job from which you wish to return material. After entering the job number, the job's part number and the part number's description display.

3. Select the job **assembly** and **material**being moved.

4. Enter the **quantity** of the return.

5. Select the **warehouse** and **bin** from/to which the material is being returned.

6. Select **Save**. 💾

Working with Material Request Queue

The **Material Request Queue** app displays a listing of queue material movement requests. The requests are created whenever parts have to be moved from one location to another. Apps such as 'Receipt Entry', 'Fulfillment Workbench', and 'Replenishment Workbench' can generate these requests.

The 'Material Request Queue' app is valuable when you want to both view and take action on material quantity requests.

You can also print inventory tags for the requested material requests.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

> ℹ️ If a 'Submit for Picking' request is sent from the 'Fulfillment Workbench' app, then there are separate material queue records when the allocation includes both 'Inventory' and 'PCID Inventory'.

In this article, we will cover:

- [Selecting material requests](#)
- [Processing a material request](#)
- [Generating inventory tags for a material request](#)
- [Printing a material request](#)

Selecting Material Requests

1. Open the **Material Request Queue** app.

2. Use the **Filters** card to retrieve specific material request transactions. The following options are available:

- Using the **From Date** and **To Date** fields, you can specify the date range for the material request transactions you wish to select.
- Using the **Transaction Type** field, you can select the type of transaction you wish to retrieve.
- Using the **From Warehouse** and To **Warehouse** fields, you can specify the range of warehouses for which you wish to select material request transactions.

3. Select the queue transaction(s) you want to process.

In this case, we selected '2' material queue transactions. However, if you want to select all the transactions, select the **All** check box.

4. Finally, select the **Select** button.

Processing a Material Request

1. Next, select the **My Selections** tab.

   The previously selected transactions display. In this case, there are '2' material queue transactions.

☐		Seq	Date	Time	Priority	Part
▸☐		1	03/04/2024	10:53:46	1	1032KNUT
☐		3	03/04/2024	11:06:28	1	1032KNUT

2. Now select the transactions.

☑		Seq	Date	Time	Priority	Part
☑		1	03/04/2024	10:53:46	1	1032KNUT
▸☑		3	03/04/2024	11:06:28	1	1032KNUT

3. Select the **Tags** button if you need to

   The **Print Tags** panel opens.

   Deselect   Process   Tags   Print

4. In the panel, select **Print Preview** and review and print the tag(s) if necessary.

   Print Tags

> ℹ This tag is for the first material queue transaction. Remember, in this example we have '2'.

5. In the panel, select the **Next** button.

> ℹ Review and print the tag for the second material queue transaction. Depending on how many transactions you want to print the tags for, keep pressing the **Next** button. As previously mentioned, in this example we have two material queue transactions.

6. Now select the **Process** button.

   The **WIP/Material Movement Transaction** panel opens.

7. In the **Material Movement** card, review the material details such as 'Part', 'Reference', and 'Quantity'.

8. In the **WIP/Material Movement Transaction** panel, on the **Locations** card, review/define the **To** and **From** location details.

9. To select the lot number, use the **Lot Number** drop-down.

> ⚠️ This applies to **Lot Tracked** parts only.

10. To select an existing PCID, select the **PCID** button.

    The following rules apply:

    - If you already assigned PCID to items in the site you are moving the items from, the PCID field defaults the assigned PCID number. This applies to the PCID field located in the WIP/Material Movement Transaction > From Location card.

    - You cannot use PCIDs that hold a Package Code marked as Returnable for a transfer order pick or shipment . The same logic applies if you try to generate a PCID using the Package Control ID Generator.

      Example: You process a material request and in the WIP/Material Movement Transaction > To Location pane select a PCID that holds a Package Code marked as Returnable. Under this scenario, the Returnable PCIDs are not allowed for transfer picking message would display not allowing you to complete the material transaction.

    - Depending how you set up PCID Build/Split/Merge (STATIC/DYNAMIC Package Control Type), you can:
      - Pick items from Loose Inventory to Dynamic PCID
      - Pick items from Loose Inventory to Static PCID
      - Pick items from Static PCID to Static PCID
      - Pick items from Dynamic PCID to Dynamic PCID
      - Pick items from Static PCID to Dynamic PCID
      - Pick items from Dynamic PCID to Static PCID
      - Pick items from PCID (partial) to Static PCID
      - Pick items from PCID (partial) to Dynamic PCID
      - Pick Allocated PCID to Static PCID (full)
      - Pick Allocated PCID to Dynamic PCID (full)

    - If you set the shipping site to No Serial Tracking (Site Configuration > Modules > Inventory > Serial Tracking) and using the Material Request Queue you try to send items to a site that is set to Full Serial Tracking then you cannot pick from the shipping site into Dynamic PCIDs that contain parts identified as Serial Tracked. If you do so, the The PCID contains serial tracked parts. Processing of serial numbers in a site that does not track serial numbers to a site that tracks serial numbers is not supported for PCID. message displays.

    - You can allocate and release for picking a full Dynamic PCID and move it to shipping (Shipment Warehouse/Bin). When you process a material transaction, the Quantity will always display one, irrespective of the number of items the PCID holds. This is because

you are moving a full PCID.

Example: The Dynamic PCID number ten holds **20** units of the MetalRod part. There is demand for this part (Transfer Order), so you process the material transaction to make the items ready for shipment. As you process the PCID, the **Quantity** field would display the value of **1** and the From Location pane would have the PCID 10, warehouse, and bin records selected by default, but remaining greyed out. You can also select the To Location warehouse and bin to overwrite the default values. Once you process the material transaction for this part:

- The PCID status changes to **TFOPICK**
- The full PCID is ready to be shipped

11. Select **OK** to confirm.

    The **WIP/Material Movement Transaction** panel displays the second material queue transaction. Remember, we initially selected '2' transaction.

12. Review the panel for the second transaction and select **OK** to confirm.

    > ℹ️ Depending on how many transactions you want to process, keep pressing the **OK** button. For example, assume you selected '10' transactions for processing. In this case, you would process them one by one in a loop.

13. If your company uses legal numbers for material movements and the generation type is **Manual**, then the **Legal Number** prompt displays. Enter the legal number for the transaction and select **OK**.

    > ℹ️ If the legal number generation type is Automatic, the legal number automatically generates when you select **OK**.

> ℹ To generate legal numbers for material movements, a legal number format must be defined in Legal Number Maintenance and at least one transaction document type must be selected. The generated legal number uses the legal number format defined for the selected Document Type.

Running the Automated Fulfillment Process

The process calls the 'Fulfillment Workbench' logic for all records in the allocation queue just as if you searched for the records in the queue and attempted to allocate them manually.

> ℹ For more information on how the order fulfillment works, refer to the Using Fulfillment Workbench topic in the Kinetic help.

> ℹ To be able to set the auto allocation, you must:
>
> - Install the Advanced Material Management (AMM) license.
> - Set the site you are working with to auto-allocation. For more information refer to the Setting Up Automated Sales Order Fulfillment topic in the Kinetic help.

To run the process:

1. Open the **Automated Fulfillment Process** app.

2. Select the **Continuous Processing** check box if you want the process to run on a continuous basis.

3. Select the **Fulfill Demand Warehouse Only** check box if you want to fulfill using a demand warehouse.

   The demand warehouse is the warehouse displayed on the order release, job material, or transfer order line. The process would use inventory balances found only in the demand warehouse designated for the part.

   > ℹ This selection does not release the items to the 'Material Queue' for immediate picking. The 'Rule Class' you select in this app would have to have a rule that holds the 'Release For Picking' action.

4. In the Rule Class field, search for and select the rule class you want the process to consider.

5. Specify the if you want the process to delay by entering a value in the **Delay (minutes)** field.

> ℹ️ For example, if you enter '60' in this field then the process runs in the background with a '60' minute delay between each process run.

6. Verify the Lof Filename field defaults to **AutomatedFulfillment.log**.

7. Expand the Filter card to be able to select a specific site relevant to the process run.

> ℹ️ The default is **All Sites**, meaning the process considers all the sites in your company.

8. Expand the **Advanced** card.

9. Using the **Schedule** field, select a schedule.

> ℹ️ This field specifies a list of schedule options during which you would like the process to run. The options include Now, Startup Task Schedule, Interval Processing and any other user-defined schedules created for your company.

10. Select the **Recurring** check box to indicate that the process should be run on a repeating basis.

11. Select **Process**. ⚙️

> ℹ️ Using the 'System Monitor' app, verify whether you process completed successfully. To locate the app, select the 'Notifications' icon on the 'Menu' bar and select the 'System Monitor' icon.

Adjusting Work In Process (WIP) Materials

Using the **Adjust WIP** app, you can adjust the physical location or quantity of a Work In Process (WIP) material. You only run this app when a WIP part record specifies one physical location, but its actual location is different.

In this article, we will cover adjusting WIP material.

1. Open the **Adjust WIP** app.

    The Landing page displays.

2. In the Job field, search for and select a job that contains the material being adjusted.

3. Enter the current job **Assembly**, and specify the **Operation** for adjustment.

4. Specify the **Warehouse** and **Bin** to which you want to move the material.

5. Select the **Part** for adjustment.

> ℹ️ If the material you are adjusting is the 'Attribute Tracked Part' review the following concept to understand the concept of 'Advanced Unit of Measure':
>
> - Working with Advanced Unit of Measure
>
> - Understanding Attribute Sets
>
>

> ℹ️ If the material you are adjusting is set to 'Track Inventory by Revision', review the Track Inventory by Revision Overview article.

6. In the **Quantity to Issue** field, specify the quantity of the material being moved.

7. Specify the date for the quantity adjustment in the **Issue Date** field.

8. Select the **Issued Complete** check box, if you moved the whole amount of the selected job material to the warehouse bin.

9. Select **Save**.

10. Exit the Adjust WIP app.

Adjusting WIP for an Assembly

Using the **Adjust WIP** app, you can adjust the physical location or quantity of a Work In Process (WIP) assembly. You only run this app when a WIP part record specifies one physical location, but its actual location is different.

In this article, we will:

- [Create a Job](#)

- [Complete the Job](#)

- [Review the Job](#)

- [Adjust WIP](#)

- [Reviewing the Job](#)

Creating a Job

Next, create a job. In this example, we are going to create a job for '10' units of the 'Satellite Assembly' part.

> ⓘ The part used in this example is a manufactured item. You will define a method of manufacture directly in the 'Job Entry' app.

1. Open the **Job** app.

   The Landing page displays.

2. Select **New Job**.

   The New Job Number panel displays.

3. Inside the panel, select Next Job.

   Kinetic generates a new job number.

4. Inside the panel, select **OK**.

5. In the **Part** field, search for and select a part.

> ⓘ In this example, we use part 'DSS-1000' (Satellite Assembly). However, this is just an example.

If you want to work with the same 'Satellite Assembly' part, you must create it. Here is how you do it.

1. Open the **Part** app.

2. Select **New**.

3. In the **Part** field, enter **DSS-1000**.

> ⓘ If the part already exists, you don't have to create it. This is if you use the 'Epicor Eduction' database. If you are not, then follow these steps. However, you can work with any manufactured item you want. This is the part used in this example.

4. In the **Description** field, enter **DSS Satellite Assembly**.

5. In the **Type** field, select **Manufactured**.

6. Select **Save**.

7. Exit the Part app.

6. In the **Required By** field, select the date that represents one week from today.

7. Select **Save**.

8. In the Nav tree, select the **Demands/ Demand Detail** node.

    The Demand Detail card displays.

9. Select **New Demand**.

10. In the **Make To** field, verify **Make To Stock** defaults.

11. In the **Quantity** field, enter **10**.

12. Select **Save**.

13. Select the **Assemblies** page.

     The Assembly card displays.

14. In the Nav tree, right-click the **Operations** node and select **New Operation**.

    The Operations card displays.

15. In the Nav tree, expand the **Operations** node and select **Opr:10 OP:**.

    The Operation card displays.

16. In the **Operation** field, select an operation.

> ℹ️ In this case, we selected the 'Assembly' operation. However, you can select any other operation.

17. In the **Prod Std** field, enter **1**.

18. Select **Save**.

19. Select the **Details** page.

20. In the Nav tree, select the **Details** node.

The Job card displays.

21. Select the **Engineered** check box.

22. Select the **Released** check box.

    The Schedule Job panel opens.

23. Inside the panel, accept the default of **Backward** schedule and select **OK**.

24. Select **Save**.

25. Record the job number.

26. Exit the Job Entry app.

Completing the Job

Next, we will complete the job but and purposely produce '100' units instead of '10'.

1. Open the **Data Collection** app and log in.

> **i** In the 'Search' window, type in 'Office MES' and select one of the two 'Kinetic' locations.

2. Select **Start Production**.

   The Start Production Activity panel opens.

3. Inside the panel, in the **Job** field, enter the previously recorded job and press **Tab**.

4. In the **Operation** field, select a job operation.

> ℹ️ The job used in this example holds a single operation only.

5. Inside the panel, select **OK** to confirm.

6. Select **End Activity**.

   The End Labor Activity panel opens.

7. In the **Current** field, enter **100** and press **Tab**.

8. Inside the panel, select **OK** to confirm.

   To the **Warning** related message, select **Yes**.

   > ℹ️ The 'Data Collection' app is a real time app. Therefore, the message displays.

9. Exit the Data Collection app.

Reviewing the Job

Next, review how many 'Satellite Assemblies' part you have in 'WIP'.

1. Open the **Job Tacker** app.

   The Landing page displays.

2. In the **Job Number** field, enter the previously recorded job number and press **Tab**.

   The Job card displays.

3. Select the **Activity** page.

4. Scroll down to locate the **WIP Part Locations** card and expand it.

    You can see that there is a quantity of '100' units in WIP.

5. Minimize the Job Tracker app.

Adjusting the WIP

Next, adjust the WIP quantity from the originally produced '100' units to '10'. The job used in this example was for '10' units of the 'Satellite Assembly' part, but you over produced.

1. Open the **Adjust WIP** app.

    The Landing page displays.

2. In the **Job** field, enter the previously recorded job and press **Tab**.

3. The Part field displays the **Satellite Assembly** part.

> ℹ️ In this case, part 'DSS-1000'. However, this is just an example.

4. In the **Quantity** field, enter **-90**.

5. Select **Save**.

6. Exit the Adjust WIP app.

Reviewing the Job

Finally, review the WIP quantity on the job again.

1. Maximize the **Job Tracker** app.

> ℹ️ If you accidentally exited the app instead of minimizing it, open the 'Job Tracker' app again and search for and select the previously recorded job.

2. Make sure you are on the **Activity** page and the **WIP Part Locations** card is expanded.

3. Select **Refresh**.

4. Review the **WIP Part Locations** card.

The 'Quantity' column field now shows the value of '10'. This is correct.

5. Exit the Job Tracker app.

Working With WIP Shipping Action

You can define the **WIP Shipping Action** in the **Site Configuration Control** app. The action you select can **warn** or **stop** you from shipping the part you have in WIP if you don't have enough quantity to fulfill the shipment line. Kinetic also allows you to ship the full quantity without having the full quantity in your 'Shipping' warehouse and its bin. This is the **None** action.

The actions you can define in the 'WIP Shipping Action' field include:

- **None** - Nothing happens at the time of customer shipment and you can ship the default quantity even if some parts are missing in WIP.

- **Warn** - Kinetic warns you that you don't have enough quantity in WIP at the time of customer shipment (Customer Shipment Entry), but gives you the option to continue.

- **Stop** - Kinetic stops you from shipping the incomplete WIP quantity at the time of customer shipment.

In this article, we will:

- [Define the WIP Shipping Action](#)

- [Define a Part](#)

- [Enter a Sales Order](#)

- [Create a Job](#)

- [Complete the Job](#)

- [Report Labor](#)

- [Review WIP Location](#)

- [Move WIP](#)

- [Review WIP Location](#)

- [Report Labor](#)

- [Review WIP Location](#)

- [Ship the Sales Order](#)

Defining the WIP Shipping Action

Start with defining the 'WIP Shipping Action' in the 'Site Configuration Control' app.

1. Open the **Site Configuration Control** app.

   The Landing page displays.

2. In the card's grid, select the site link inside the grid.

   The **Details** card displays.

> ℹ️ In this case, we selected the 'Main' side. However, this is just an example.

3. In the Nav tree, select the **AMM** node.

4. Scroll down to locate the **WIP Settings** card and expand it.

5. Select the action.

> ℹ️ In this case, we select the 'Stop' action.

6. Finally, select **Save**.

7. Exit the Site Configuration Control app.

Defining a Part

Next, create a new part record.

1. Open the **Part** app.

2. Select **New**.

    The Part card displays.

3. In the **Part** field, enter **WIP_Part**.

4. In the **Description** field, enter WIP Part.

5. In the **Type** field, select **Manufactured**.

6. Select **Save**.

7. Exit the Part app.

Entering a Sales Order

The next step in the process is to create a sales order. In this example, you will create a sales order for '3' units of the previously created 'WIP_Part'.

1. Open the **Order Entry** app.

   The Landing page displays.

2. Select **New Order**.

3. In the **Customer** field, enter a customer and press **Tab**.

> **i** In this case, we select enter 'Dalton'. However, this is just an example.

4. In the **Need By** field, enter the date one week from today.

5. Select **Save**.

6. In the Nav tree, select the **Lines > Detail** node.

    The **Line Detail** card displays.

7. Select **New Line**.

8. In the **Part** field, enter **WIP_Part** and press **Tab**.

> **i** This is the previously created part.

9. In the **Order Quantity** field, enter **3**.

10. Select **Save**.

11. In the Nav tree, select the **Releases > Release Detail** node.

    The **Detail** card displays.

12. Select the **Make Direct** check box.

13. Select **Save**.

14. Record the sales order number.

15. Remain in the Order Entry app.

Creating a Job

Next, you will create a job directly from the 'Order Entry' app.

1. You are in the **Order Entry** app.

2. In the Nav tree, select the **Sales Order** node.

   The **Order Header** card displays.

3. Verify the **Ready To Process** check box is selected by default.

   If it is not, select it.

4. From the **Overflow** menu, select **Order Job Wizard**.

   The **Order Job Wizard** panel opens.

5. Inside the panel, select the **Create Job** check box.

6. Inside the panel, select the **Create Jobs** button.

   The **Question** panel opens.

> ℹ️ You will add a single operation in the 'Job Entry' app. This is to simplify the scenario you are following in this article.

7. To the message, select **Yes**.

8. Scroll down inside the **Order Job Wizard** panel to locate the generated job number.

> ℹ️ In this case, Kinetic generated job '2440'. However, your job will be different. This is just an example.

9. Record the job number.

10. Inside the **Order Job Wizard** panel, select **Close**.

11. Exit the Order Number app.

Completing the Job

Next, complete the job. You will add a single operation to it.

1. Open the **Job Entry** app.

   The Landing page displays.

2. In the **Job Num*** field, enter the previously generated job and press **Tab**.

   The **Job** card displays.

3. Select the **Assemblies** page.

   The **Assembly** card displays.

4. In the Nav tree, right-click the **Operations** node and select **New Operation**.

5. In the Nav tree, select the **Opr: 10 OP:** node.

   The **Operation** card displays.

6. In the **Operation** field, select an operation.

ℹ	In this case, we selected the 'Assembly' operation.

7. In the **Std Format** field, enter **1**.

8. Select **Save**.

9. Select the **Details** page.

   The **Job** card displays.

10. Select the **Engineered** and **Released** check boxes.

    The **Schedule Job** panel opens.

11. Inside the panel, accept the default of the **Backward** schedule and select **OK**.

12. Select **Save**.

13. Minimize the **Job Entry** app.

Reporting Labor

Assume you started production and produced '2' units of the 'WIP_Part'.

1. Open the **Data Collection** app and clock in.

> ℹ️ In this case, we are clocked in as Charles L. Johnson.

2. Select **Start Production**.

   The **Start Production Activity** panel opens.

3. In the **Job** field, enter the previously recorded job and press **Tab**.

4. In the **Operation** field, select operation **10**.

5. Inside the **Start Production Activity** panel, select **OK**.

6. Select **End Activity**.

   The **End Labor Activity** panel opens.

7. In the **Current** field, enter **2**.

8. Inside the **End Labor Activity** panel, select **OK**.

   The **Warning** panel opens.

⚠ Warning

Transaction efficiency % is under limit. Do you want to continue?

> ⓘ   This is 'OK'. You are reporting in real time.

9. Inside the **Warning** panel, select **Yes**.

10. Exit the Data Collection app.

Reviewing WIP Location

Now you review what has been produced. You should have '2' pieces of the 'WIP_Part' in 'WIP'. Since we minimized the 'Job Entry' app, we use it to review 'WIP'. However, you can also use the 'Job Tracker' or 'Part Tracker' apps.

1. Maximize the **Job Entry** app.

> ⓘ   If you accidentally closed the app, navigate to it and retrieve the previously generated job.

2. Select **Refresh**.

3. Select the **Activity** page.

4. Expand the **WIP Part Locations** card.

5. Review the card.

You have '2' units of the 'WIP_Part' in 'WIP' and ready to be shipped to 'Dalton'.

6. Minimize the Job Entry app.

Moving WIP

You have produced '2' pieces out of '3'. The 'Dalton' customer ordered '3' units of the 'WIP_Part'. Next, move '2' pieces to your inventory.

1. Open the **Move WIP** app.

   The Landing page displays.

2. In the **Job** field, enter the previously generated job number and press **Tab**.

   The **Details** card displays.

3. Scroll down to locate the **To** group box.

4. In the **Warehouse** field, select **Main** (CHI).

> ℹ️ In this example, we selected the 'Main' warehouse and bin '01-01-01'. However, this is just an example. You can select any warehouse and its bin that you have in your database.

5. In the **Bin** field, enter **01-01-01** and press **Tab**.

6. In the **Quantity** field, verify **2** defaults.

> ℹ️ This is correct. You want to move '2' units from WIP to your inventory.

7. Select **Save**.

8. Exit the Move WIP app.

Reviewing WIP Location

Next, review your inventory. Again, we will use the 'Job Entry' app, since you minimized it.

1. Maximize the **Job Entry** app.

   > ℹ️ If you accidentally closed the app, navigate to it and retrieve the previously generated job. You should be on the 'Activity' page with the 'WIP Part Locations' card expanded.

2. Select **Refresh**.

3. Review the card.

   You have '2' units of the 'WIP_Part' in 'Main' warehouse location. Remember, you previously marked the sales order release as 'Make Direct'. Therefore, the 'WIP_Part' used in this example does not touch you inventory. However, for the purpose of this article, we moved to units to stock using the 'Move WIP' app.

4. Minimize the Job Entry app.

Reporting Labor

Next, produce the missing unit.

1. Open the **Data Collection** app and clock in.

> ℹ️ We are again clocked in as Charles L. Johnson.

2. Select **Start Production**.

   The **Start Production Activity** panel opens.

3. In the **Job** field, enter the previously recorded job and press **Tab**.

4. In the **Operation** field, select operation **10**.

5. Inside the **Start Production Activity** panel, select **OK**.

6. Select **End Activity**.

   The **End Labor Activity** panel opens.

7. In the **Current** field, enter **1** and press **Tab**.

   The **Complete** operation is selected by default. This is correct! We are producing the last unit out of three.

8. Inside the **End Labor Activity** panel, select **OK**.

   The **Warning** panel opens.

> ℹ️ This is 'OK'. You are reporting in real time.

9. Inside the **Warning** panel, select **Yes**.

10. Exit the Data Collection app.

Reviewing WIP Location

Next, review your inventory. Again, we will use the 'Job Entry' app, since you minimized it.

1. Maximize the **Job Entry** app.

> ℹ️ If you accidentally closed the app, navigate to it and retrieve the previously generated job. You should be on the 'Activity' page with the 'WIP Part Locations' card expanded.

2. Select **Refresh**.

3. Review the card.

Part	Description	Rev	Quantity	UOM	Warehouse	Bin
▶WIP_Part	WIP Part		2.00	EA	Main	01-01-01
WIP_Part	WIP Part		1.00	EA	Shipping Area	SHP-1

At this point, you have '2' units of the 'WIP_Part' in 'Main' warehouse. You also have '1' piece in the 'Shipping Area' warehouse. This is correct! You previously manufactured the last unit.

4. Exit the Job Entry app.

Shipping the Sales Order

Finally, ship the sales order.

1. Open the **Customer Shipment Entry** app.

2. Select **New Pack**.

   The **Header Details** card displays.

3. In the **Order Number** field, enter the previously recorded order number and press **Tab**.

4. Select **Save**.

Kinetic generated a new Pack number.

5. In the Nav tree, select the **Shipment Lines/Line Details** node.

The **Line Detail** card displays.

6. Select **New Line**.

7. In the **Line** field, enter **1** and press **Tab**.

8. In the **Release** field, enter **1** and press **Tab**.

> ℹ️ Notice the **Shipped Complete** check box is selected.
>
>

9. Scroll down to locate the **From Manufacturing** card.

10. Review the card.

    You are shipping the full quantity of '3'. However, you have only '1' piece in the 'Shipping Warehouse', since you have moved '2' units to your inventory.

11. Select **Save**.

    The **Error** panel opens. Kinetic does not allow you to ship. This is because of the 'Stop' action you selected in the 'WIP Shipping Action' field located in the 'Site Configuration Control' app.

12. Inside the **Error** panel, select **OK**.

13. Minimize the **Customer Shipment Entry** app.

14. Open the **Site Configuration Control** app and select the **Warn** 'WIP Shipping Action'.

    > Use the steps in this article to locate the app and select the action. Don't forget to 'Save'.

15. Maximize the **Customer Shipment Entry** app.

    > You should be on the 'Line Detail' card.

16. Select **Refresh**.

    The **Line Detail** card clears.

17. Select **New Line**.

18. In the **Order Number** field, enter the previously recorded order number and press **Tab**.

> ℹ️ If the order number displays by default, ship this step.

19. In the **Line** field, enter **1** and press **Tab**.

20. In the **Release** field, enter **1** and press **Tab**.

> ℹ️ Notice the **Shipped Complete** check box is selected.
>
>

21. Select **Save**.

The **Information** panel opens. Kinetic informs you about the quantity discrepancy but allows you to continue.

> ⊙ **Information**
>
> There is not enough WIP quantity in Shipping Location Warehouse 'Shipping Area', Bin 'SHP-1' for Order Line: '0.
>
> Are you sure you want to ship?

22. Inside the **Information** panel, select **No**.

23. Minimize the **Customer Shipment Entry** app.

24. Open the **Site Configuration Control** app and select the **None** 'WIP Shipping Action'.

> ℹ️ Use the steps in this article to locate the app and select the action. Don't forget to 'Save'. 💾

25. Maximize the **Customer Shipment Entry** app.

> ℹ️ You should be on the 'Line Detail' card.

26. Select **Refresh**.

The **Line Detail** card clears.

27. Select **New Line**.

28. In the **Order Number** field, enter the previously recorded order number and press **Tab**.

> ⓘ If the order number displays by default, ship this step.

29. In the **Line** field, enter **1** and press **Tab**.

30. In the **Release** field, enter **1** and press **Tab**.

> ⓘ Notice the **Shipped Complete** check box is selected.
>
>

31. Select **Save**.

    You are able to complete the shipment.

32. Select the **Details** node.

    The **Header Details** card displays.

> ⓘ This is the very top node in the Nav tree.

33. Select the **Shipped** check box.

Options

☑ Shipped

☐ External Delivery Note

34. Select **Save**.

35. Exit the Customer Shipment Entry app.

Material Queue Requests

This section of the user guide covers 'Material Queue Requests' relevant to the 'Advanced Material Management' (AMM) module.

Creating a Request to Move Inventory

The **Move Inventory Request** allows you to enter a movement request for inventory. This app is valuable when you want to request movement for a part to another job or warehouse.

You then process these in the 'Material Queue' app. Once processed, the app then creates a material transaction that can change the cost, quantity, and/or location of this material.

1. Open the **Move Inventory Request** app.

2. Search for and select a PCID and part.

> ℹ️ You do not have to select a PCID if you are not using this feature.

3. Define a direction.

> ℹ️ Indicate the direction the inventory part quantity will move. Select **Out** if you want the material quantity to move out of a warehouse. If you want the material quantity to move into a warehouse, select **In**.

4. Specify the quantity of the part being moved.

> ℹ️ The quantity (whole, or fractional with decimals) you can enter in this field, and the number of allowed decimal places, is dependent on the setting of the 'Allow Decimals' and 'Decimals' fields in the 'UOM Maintenance' app for the selected 'UOM' code.
>
> If the **Track Multiple UOMs** check box is selected for the part in the 'Part' app, then you cannot enter negative quantities . An error message displays if a quantity you enter is greater than the on-hand quantity.
>
> After entering the quantity, enter the 'UOM' code that represents the unit of measure (for example, 'Each', 'Case', 'Cubic Centimeters') in which the quantity is expressed. The default is the base 'UOM' code defined for the job material.

5. Use the **From Warehouse** and **From Bin** fields to specify the warehouse and bin from which the part/PCIDis being transferred.

6. Enter the warehouse and bin to which the part/PCID is being transferred in the **To Warehouse** and **To Bin** fields.

7. Select **Save**. 🖫

8. Exit the Move Inventory Request app.

Creating a Request to Move a Material

Request a movement transaction for materials in **Move Material Request**. There, you indicate that you want to move materials from one warehouse/bin to another. Then, you can process these requests in the Material Queue. When the system processes the request, it then creates a material transaction that can change the cost, quantity, and/or location of this material.

⚠ The system will not add PartWIP records for job operations that are complete. This way, it won't create negative WIP lines as a result of material movement.

In this article, we will cover requesting to move a material.

1. From the main menu, navigate to **Material Management > Advanced Material Management > General Operations > Move Material Request**.

2. Search 🔍 for a job the material of which you want to move. This job must be open.

3. Specify the assembly and the material you want to move.

   You can review the respective descriptions in the grayed-out fields next to the **Job**, **Assembly**, and **Material** fields.

4. Select the direction in which the material is moving: **Out** (from this job to another source) or **In** (from another source to this job).

5. Enter the **Quantity** to move.

The UOM code that appears next to this field represents the unit of measure (for example, Each, Case, Feet) in which the quantity is expressed. The quantity (whole or fractional with decimals) you can enter in this field and the number of allowed decimal places depends on the setting of the **Allow Decimals** and **Decimals** fields in **UOM Maintenance** for the selected UOM code.

6. Specify the **FROM** and **TO** warehouses and bins.

- Kinetic validates that the bin number you specify in the **From Bin** and **To Bin** fields exists in the **Warehouse Bin Maintenance** app for this warehouse. It also validates the assigned bin type and displays a warning message if it is a supplier-managed or customer-managed bin. If yes, it then validates that the supplier or customer code associated with the transaction or material you are moving matches the supplier or customer code you assigned to the warehouse bin in the **Type** field in **Warehouse Bin Maintenance**.

- You can select the 'FROM' and 'TO' PCIDs or generate a new one using the 'Generate PCID' button. For example, one of your job materials belongs to PCID '1' and you want to move '10' pieces to PCID '2'. As a result, you select PCID '2' in the 'To PCID' field. However, the PCID must exist. If it does not, you can use the 'Generate PCID' button to create one. To use this feature, you must install the 'Advanced Material Management' (AMM) license.

7. Select **Save**.

Entering Requests for Material in Get Request

Enter requests for materials in **Get Request**. Here you can request either raw materials or WIP product to the pick queue. This application is very useful for managing requests for timely location

and delivery of the right parts to the proper resource.

Then, you can process these requests in **Material Queue**. After the system processes the request, it creates a material transaction that can change the cost, quantity, and/or location of this material.

To enter a request:

1. From the main menu, go to **Material Management > Advanced Material Management > General Operations > Get Request**.

2. In the **Job** field, select the **Search** icon 🔍 and search for the job that contains the material you want to request. You can't select the jobs with the **Closed** and **Not Engineered** statuses.

> ℹ️ The fields on the right show the names and descriptions of the job/assembly/sequence you select.

3. From the drop-downs, select the assembly and the operation sequence you want to request. You can see the description of the values you choose in the grayed-out fields next to the **Job**, **Assembly** and **Seq** fields.

Job...		Part
005697-1-1	🔍	DCD-100-SP
Assembly...		Assembly Part
0	⌄	DCD-100-SP
Seq...		Operation
0	⌄	

4. In the **Calculate By** section, select the radio button next to the basis on which you want to request the material:

   - **Outstanding** - You request all outstanding pieces of the material from the job.

   - **Pieces** - You request a fixed number of pieces. You need to enter the number in the field next to the radio button. The UOM code that appears next to this field represents the unit of measure (for example, Each, Case, Feet) in which the quantity is expressed. The quantity (whole or fractional with decimals) you can enter in this field and the number of allowed decimal places depends on the setting of the **Allow Decimals** and **Decimals** fields in **UOM Maintenance** for the selected UOM code.

   - **Hours** - You request materials from a particular number of hours. You need to enter the number of hours in the field next to this radio button.

5. In the **Need By Date** and **Need By Time** fields, enter the date and time by which you need to have the materials.

6. The **Operation Details** section displays the number of estimated/completed/remaining pieces or hours that you requested. The UOM code that appears next to this field represents the unit of measure (for example, Each, Case, Feet) in which the quantity is expressed. This is the UOM code previously assigned to the job assembly part.

7. If you want, you can also review the request lines by expanding the respective panel card.

8. Once done, select **Save** .

Using Move WIP Request

Use the **Move WIP Request** app to request a move transaction for a job sub-assembly from one physical location (warehouse/bin) to another. You can then process this request using the **Material Queue** app. The request creates a material transaction that can change the cost, quantity, and/or location of this material.

In this article, we will cover creating a request to move a WIP job.

1. Open the **Move WIP Request** app.

2. In the **Job** field, search for and select a job.

3. In the Assembly field, select the assembly you want to request a move for.

4. In the Operation group box, in the Operation field, select an operation .

5. Select the direction in which the job is moving: **Out** (from this job to another source) or **In** (from another source to this job).

6. Define the quantity you want to move using the **Quantity** field.

The UOM code that appears next to this field represents the unit of measure (for example, Each, Case, Feet) in which the quantity is expressed. The quantity (whole or fractional with decimals) you can enter in this field and the number of allowed decimal places depends on the setting of the **Allow Decimals** and **Decimals** fields in the **UOM Maintenance** app for the selected UOM code.

7. Specify the 'From' and 'To' locations to move a job operation.

Warehouses

From Warehouse
Production Floor

From Bin
Assembly Area

From PCID
PCID1

To Warehouse
Main

To Bin
CHI Finished Goods Area 100

To PCID
PCID2

Kinetic validates that the bin number you specify in the **From Bin** and **To Bin** fields exists in the 'Warehouse Bin Maintenance' app for this warehouse. It also validates the assigned bin type and displays a warning message if it is a supplier-managed or customer-managed bin. If yes, it then validates that the supplier or customer code associated with the transaction or material you are moving matches the supplier or customer code you assigned to the warehouse bin in the **Type** field in the Warehouse Bin Maintenance app.

- Kinetic validates that the bin number you specify in the **From Bin** and **To Bin** fields exists in the 'Warehouse Bin Maintenance' app for this warehouse. It also validates the assigned bin type and displays a warning message if it is a supplier-managed or customer-managed bin. If yes, it then validates that the supplier or customer code associated with the transaction or material you are moving matches the supplier or customer code you assigned to the warehouse bin in the **Type** field in the 'Warehouse Bin Maintenance' app.

- If a part quantity belongs to a PCID, you can move the quantity from once 'PCID' to another. You specify this in the 'From PCID' and 'To PCID' fields. If you want to learn

more about 'WIP PCIDs' review the [Working with PCIDs and WIP](#) article an its related articles.

8. Select **Save**.

9. Exit the Move WIP Request app.

Automated Fulfillment

In Kinetic, you can automate sales order, transfer order, and job fulfillment by setting up rules to bypass manual 'allocating' and 'releasing to picking' of items using the 'Fulfillment Workbench' app.

This section of the user guide covers the 'Automated Fulfillment' functionality.

Automated Fulfillment Overview

In Kinetic, you can automate sales order, transfer order, and job fulfillment by setting up rules to bypass manual 'allocating' and 'releasing to picking' of items using the 'Fulfillment Workbench' app.

The 'Automated Fulfillment' functionality gives you a way to build a matrix of rules that can replace and automate what you manually execute in the 'Fulfillment Workbench' app. Every manual action you take to allocate quantity for sales orders, jobs and transfer orders can now be executed through a series of automated fulfillment rules. Using this functionality, you can search or select data that is in various tables, fields or UD fields. You can access/define queries and use the 'Expression Builder' to add criteria on the actions provided in the automated fulfillment rules. In regard to Kinetic queries, the 'Where Clause' can be added directly on a query that calls in the rule, or the query can just gather the required tables. In this case, you add the 'Where Clause' to the rule. You can also use a 'Test Rules' function located in the 'Automated Fulfillment Rules' app to see the data the rules pick up and test how the actions impact those data.

The following rules apply:

- If your sales order holds multiple lines and releases, and some of them don't meet the auto-allocation criteria, then Kinetic will only allocate the order lines and releases which are in line with the criteria entered in you rule syntax. Assume you enter a sales order with '2' lines and each line holds '5' releases. However, only releases '1', '2', and '3' of each order line meet the auto-allocation criteria defined on your rule. Using this scenario, Kinetic would only auto-allocate the first '3' release and leave the '2' remaining out.

- You cannot allocate using 'Waves'. A wave is a double level picking process where you group together a bunch of orders and calculate the total quantity of each part needed to fulfill all orders in the group.

- Each rule you add to your rule class can hold different master rule, allocation template, action, query, and expression values. For example, if you create a rule class that holds '5' rules then Kinetic processes those rules in a sequence you define in the 'Automated Fulfillment Rule' app.

When you execute the 'Automated Fulfillment Process', then Kinetic will evaluate sales orders that were sent to the queue or selected from the search orders action in automated rule search line and release on a sales order. When you run the process without defining a Rule ID, then the process will review each record that was marked as 'Send to Queue' and utilize the rules of the 'Fulfillment

Workbench' to allocate quantity. If you specify a Rule ID, then the process will review data found in the 'Automated Fulfillment Rules', where the action type is either 'Load Queue', 'Search Orders', 'Search Jobs', 'Search Transfers', 'Search Demand' or a combination of the 'Load Queue' and 'Search Actions'. Next, the process will take that data set and evaluate it using the next rule in the 'Rule Class' to determine what is available to allocate quantity. Therefore, by setting up the automation rules you can decide the order in which 'Kinetic' should automatically allocate order lines and release them to picking.

- **Manual Allocation** - This is a standard fulfillment procedure.

    > ⓘ To learn more about fulfillment, review the Using Fulfilment Workbench article.

- **Semi-Automatic Fulfillment** - This is not a manual nor fully automated fulfillment, allowing you to fulfill an entire sales order or just its releases from within the 'Order Entry' app.

- **Automated Fulfillment** - You can fully automate Kinetic to fulfill sales orders, transfer orders, and jobs.

    > ⓘ This fulfillment strategy is covered in this and its related articles.

> ⚠ To use the 'Automated Fulfillment' in Kinetic, you must install the 'Advanced Material Management' license.

> ⓘ To learn how to set up 'Automated Fulfillment' in Kinetic, review the Setting Up Automated Fulfillment article.

Allocating Sales Orders

You can allocate sales orders in '3' different ways in Kinetic.

- **Manual Allocation** - This is a standard fulfillment procedure.

    > ⓘ To learn more about fulfillment, review the Using Fulfillment Workbench article.

- **Semi-Automatic Fulfillment** - This is not a manual nor fully automated fulfillment allowing you to fulfill an entire sales order or just its releases from within the 'Order Entry' app.

    > ⓘ This fulfillment strategy will be covered by this article.

- **Automated Fulfillment** - You can fully automate Kinetic to fulfill sales orders, transfer orders, and jobs.

> ℹ️ To learn more about automated fulfillment, review the Setting Up Automated Fulfillment article and its related articles.

Activating Fulfillment

First, you need to activate the fulfillment for your site.

> ⚠️ To use this feature, you must install the 'Advanced Material Management' license.
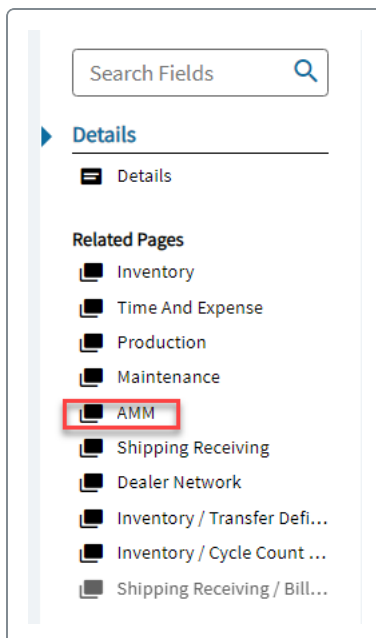
1. Open the **Site Configuration Control** app.

    The Landing page displays.

2. In the Site field, enter a site ID and press **Tab**.

    The Details card displays.

    You can also click on a site link located in the grid.

3. In the Nav tree, select the **AMM** node.

    A set of cards displays.

4. Expand the **Automated Fulfillment** card.

5. Select a default allocation template used for jobs, sales orders, or transfer orders.

> ℹ️ In this case you select a 'Sales Order Template'.

> ℹ️ You create allocation templates using the 'Allocation Template Maintenance' app. To learn how to create templates, review theCreating Allocation Templates article.

6. Select the **Enable Sales Orders** check box.

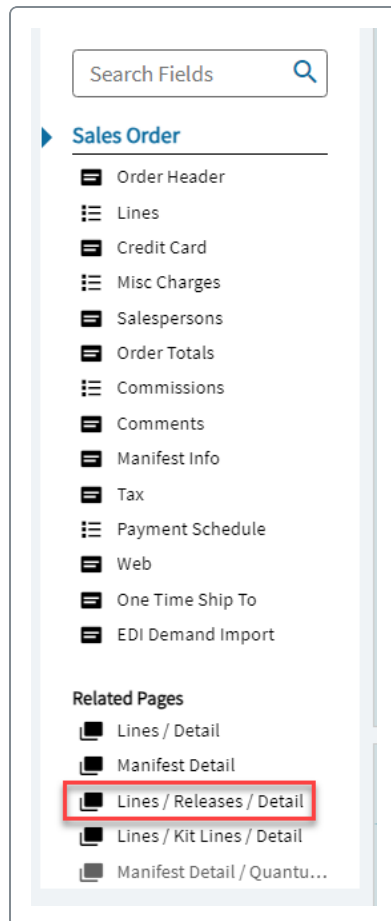   Selecting this check box activates the **Send to Queue** field.

   > ℹ️ If you select this check box, but don't define the 'Send To Queue' option (leave it blank), then you can push the sales order release to fulfillment queue.

   ☑ Enable Sales Orders

   Send to Queue ⌄

   Assume you enter a sale order for '10' units of part 'DCD-100-SP'. If you select the 'Enable Sales Orders' check box, then:

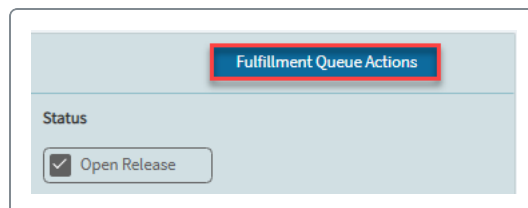   1. Enter a sales order and define its line(s) and release(s).

      > ℹ️ To learn how to create a sales order, review the Creating Sales Orders article.

   2. On your order, select the **Release Detail** node in the Nav tree.

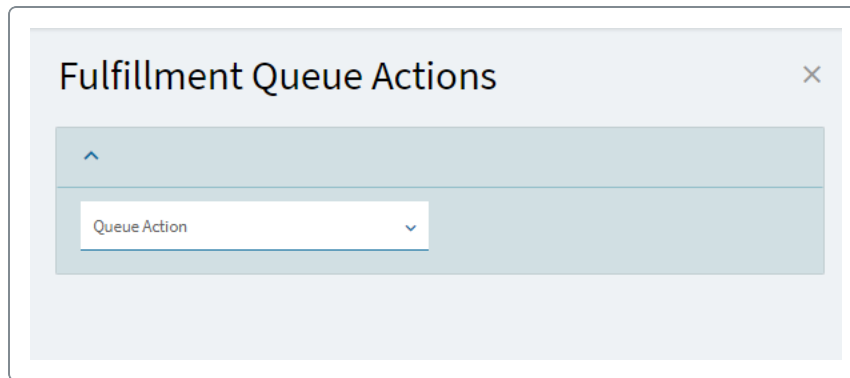   The Release Detail card displays.

3. Select **Fulfillment Queue Actions** button for your sales order release.

The Fulfillment Queue Actions panel displays.

4. Inside the panel, select **Send to fulfillment queue** in the Queue Action field.

5. Select **OK**.

7. In the Send to Queue field, select **Ready to Fulfill**.

A sales order release will go to the fulfillment queue the moment you set a sales order release to 'Ready to Fulfill'.

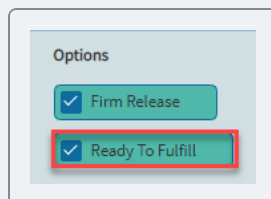⚠ Select this option only if your business requires sales orders to go directly to the fulfillment queue.

Assume you enter a sale order for '10' units of part 'DCD-100-SP'. If you select the 'Enable Sales Orders' check box and then select the 'Ready to Fulfill' option then Kinetic will send the sales order release to the fulfillment queue the moment you set it to 'Ready To Fulfill'.

1. Enter a sales order and define its line(s) and release(s).

2. On your order, select the **Release Detail** node in the Nav tree.

   The Detail card displays.

3. Select the **Ready To Fulfill** check box.

4. Select **Save**. 💾

The Fulfillment Queue group box displays the **In Queue** status.

8. Exit the Site Configuration Control app.

Creating a Sales Order

First, create a sales order and define order related dates.

1. Open the **Order Entry** app.

   The Landing page displays. The page list all the existing sales orders.

2. To create an order, select **New Order.** ⊕

   The Order Detail card displays.

3. Search for and select a customer using the Customer field.

Once you select a customer, the **Ship To** group box fills in. However, you can search for another ship to, if necessary.

> ℹ️ In this example, we selected the 'Dalton' customer.

4. Enter the required dates in the **Need By** and **Ship By** fields.

- **Need By** - The date by which the customer needs to receive the order.

- **Ship By** - The date by which you need to ship the ordered quantities so that they reach the customer by their requested date.

5. Select **Save**. 💾

6. Remain in the Order Entry app.

Creating an Order Line

Next, enter a sales order line.

1. In the Nav tree, select the **Lines/Detail** node.

    The Line Detail card displays.

2. To create a new line, select **New Line**. ⊕

3. In the Part field, search for and select the part for your order line.

4. If this is a manufactured item that includes multiple part revisions, select a revision for your part.

> **i** In this example, we used part 'DCD-100-SP'.
>
> To learn more about ordering parts with multiple revisions, review the Ordering Track Inventory By Revision Parts article.

5. Enter the quantity you need to order using the Order Quantity field.

6. Once you define the order quantity, select the unit of measure.

You would select a unit of measure for parts that do not hold a record in the 'Part' app. We call these parts 'parts-on-the-fly'. Otherwise, the unit of measure would default in this field, since you link it to a part in the 'Part' app.

7. Enter the **Need By** and **Ship By** dates.

- **Need By** - The date by which the customer needs to receive the order line. If the order line has multiple shipping releases, then you will need to enter different 'Need By' dates on each release.

- **Ship By** - The date by which you need to ship the ordered line quantities so that they reach the customer by their requested date. If the order line has multiple shipping releases, then you will need to enter different 'Need By' dates on each release.

8. Select **Save**.

9. Remain in the Order Entry app.

Allocate a Sales Order Release

Next, allocate a sales order release.

> ℹ️ As already mentioned, you can allocate an entire sales order or just its release or releases. In this case, you will learn how to allocate a sales order release.
>
> If you want to allocate an entire sales order skip these steps and proceed to the next topic called 'Allocate a Sales Order'.

1. In the Nav tree, select the **Releases/Detail** node.

   The Release Detail card displays.

2. To allocate the release, select **Fulfillment Queue Actions**.

   The **Fulfillment Queue Actions** panel opens.

   ⚠️ In this case we did not select the 'Ready to Fulfill' option in the 'Site Configuration' app.

3. In the Fulfillment Queue Actions panel, in the **Queue Action** field, select **Send to fulfillment queue**.

Fulfillment Queue Actions ✕

⌄

Queue Action
Send to fulfillment queue

ℹ The 'Send to fulfillment queue' option clears any existing entry in the queue for this release and adds the release to the end of the queue.

If you select the 'Remove from Queue' option, then Kinetic clears any existing entry in the queue for this release.

4. Select **OK** inside the panel.

ℹ The release displays the **In Queue** icon.

Fulfillment Queue

In Queue

Error Status Display

ℹ To be able to allocate the order release, you must install the 'Advanced Material Management (AMM)' license and activate the 'Enable Sales Orders' (check box) setting in the Site ConfigurationSite Configuration app.

5. Repeat the steps for other order released, if required.

ℹ The **Fulfillment Queue** group box also includes an error related field where you can view the allocation error status of the selected order release. In this case, there are no errors.

6. To review the already allocated quantity of the part on the sales order release, review the **Allocated** field located in the **Quantities** group box.

When you create a sales order and want Kinetic to auto allocate its releases, you must run the Automated Fulfillment Process.

However, this requires the 'Fulfillment Automation' setup. To learn how to do this, review the Setting Up Automated Fulfillment article.

7. Remain in the Order Entry app.

Allocate a Sales Order

If you need to allocate an entire sales order, complete the steps below. Assume your sales order includes multiple lines and each line includes multiple releases. When you allocate a sales order, it makes no difference how many lines or releases a sales order includes. They all get allocated.

1. In the Nav tree, select the **Sales Order** node.

   The **Order Header** card displays.

2. To allocate an entire sales order, select **Fulfillment Queue Actions**.

    The **Fulfillment Queue Actions** panel opens.

3. In the **Fulfillment Queue Actions** panel, in the **Queue Action** field, select **Send to allocation queue**.

    > ℹ️ The same as with the order releases, the 'Send to allocation queue' option clears any existing entry in the queue for this sales order and adds its releases to the end of the queue.
    >
    > If you select the 'Remove from Queue' option then Kinetic clears any existing entry in the queue for this sales order.

4. Select **OK**.

    > ℹ️ The release(s) displays the **In Queue** icon.

> ℹ️ To locate a sales order release, in the Nav tree, select the **Lines > Detail > Releases > Release Detail** node.
>
> Since you are allocating the whole sales order, all the released will show the 'In Queue' status.

> ℹ️ To be able to allocate the order release, you must install the 'Advanced Material Management' (AMM) license and activate the 'Enable Sales Orders' (check box) setting in the Site ConfigurationSite Configuration app.

5. Exit the Order Entry app.

Run the Automated Fulfillment Process

The process calls the 'Fulfillment Workbench' logic for all records in the allocation queue just as if you searched for the records in the queue and attempted to allocate them manually.

> 🧩 To learn more about the 'Automated Fulfillment Process', review the Run the Automated Fulfillment Process article. To learn about 'Automated Fulfillment', review the Setting Up Automated Fulfillment article.

To run the process:

1. Open the **Automated Fulfillment Process** app.

   If you want to run the process continuously, select the **Continuous Processing** check box.

   > ℹ️ If you run this process as a continuous task and this task stops in the task agent, it still runs on the application server. When this occurs, you will see a message in the **Epicor ICE Task Agent Service** event log that states the task continued running on the server. You can access this log from **Task Agent Configuration**. Because this message is a warning, you can also view it in the **System Monitor**.

2.

3. Select the **Fulfill Demand Warehouse** only check box if you want to fulfill using a demand warehouse.

   The demand warehouse is the warehouse displayed on the order release, job material, or transfer order line. The process would use inventory balances found only in the demand warehouse designated for the part.

> **i** This selection does not release the items to the 'Material Queue' for immediate picking. The 'Rule Class' you select in this app would have to have a rule that holds the 'Release For Picking' action.

4. In the Rule Class field, search for and select the rule class you want the process to consider.

5. Enter a value in the Delay (Minutes) field if yo want the process to delay.

   For example, if you enter a value of '60' in this field then the process runs in the background with a '60' minute delay between each process run. Enter a value in this field if you run the process in a continuous mode.

6. Verify the Lof Filename field defaults to **AutomatedFulfillment.log**.

   The log file shows you the sequence of the process. You can use the generated log to trouble shoot the process if it completes with errors.

7. Expand the **Filter** card and search for and select a specific site.

   The process will only run the database for the site yo select here. The default is 'All Sites', meaning the process considers all the sites in your company.

8. Expand the **Advanced** card.

9. Select a schedule for you process run in the Schedule field.

   The options include 'Now', 'Startup Task Schedule', 'Interval Processing' and any other user-defined schedules created for your company.

10. If you want the process to run on a repeating basis then select the **Recurring** check box.

11. Finally, select **Process**.

12. Exit the Automated Fulfillment Process app.

> **i** Using the 'System Monitor' app, verify whether you process completed successfully. To locate the app, select the 'Notifications' icon on the 'Menu' bar and select the 'System Monitor' icon.

Setting Up Automated Fulfillment

To utilize the 'Automated Fulfillment' functionality you must first create allocation templates for sales orders, jobs, and transfer orders. After setting these as default templates in the 'Site Configuration' app you will then create an 'Automated Fulfillment Rule Class' with rules. Each rule in the class will represent an 'Action' that will happen when the rule is processed.

To automate allocation in Kinetic you need to set it up using the following apps:

- **Site Configuration Control** - Activate the auto allocation process.

- **Fulfillment Rule Master** - Create a master rule that you can link to multiple fulfillment rule classes. This is optional, if you don't want to create the same rule criteria multiple times.

- **Fulfillment Rule Class** - Define the rules for you auto-allocation and specify the order in which Kinetic should allocate order lines.

- **Fulfillment Allocation Process** - The process holds a rule class for the auto-allocation. You can run the process continually or execute a manual process when required. This depends on the schedule you link the process to.

In this article, we will:

- [Activate the automated fulfillment](#)

- [Create a rule master](#)

- [Create a rule](#)

- [Re-sequence rules](#)

- [Run the Automated Fulfillment Process](#)

Activating Automated Fulfillment Process

First, you need to activate the automated fulfillment for your site.

> ⚠️ To use this feature, you must install the 'Advanced Material Management' license.

1. Open the **Site Configuration Control** app.

   The Landing page displays.

2. In the Site field, enter a site ID and press **Tab**.

   The Details card displays.

   You can also click on a site link located in the grid.

3. In the Nav tree, select the **AMM** node.

A set of cards displays.

4. Expand the **Automated Fulfillment** card.

5. Select a default allocation template used for jobs, sales orders, or transfer orders.

> **i** Default allocation templates are used during the 'Automated Fulfillment Process'. They are the 'Part Allocation' templates used to allocate sales orders, job materials or transfer orders. The templates must be setup for the allocation of

> ℹ️ quantity to occur, just as is required using the 'Fulfillment Workbench' app.
>
> You create allocation templates using the 'Allocation Template Maintenance' app. To learn how to create templates, review the Creating Allocation Templates article.

6. Use the **Enable Sales Orders** check box and the **Send to Queue** field in case you want to allocate a sales order and its release(s), jobs, or transfer orders line(s).

Fulfillment Queue

☐ Enable Jobs	☐ Enable Sales Orders	☐ Enable Transfer Orders
Send to Queue ⌄	Send to Queue ⌄	Send to Queue ⌄

For example, if you want to automatically send the whole sales order to the fulfillment queue, set the sales order to 'Ready to Fulfill'.

☑ Enable Sales Orders

Send to Queue
Ready to Fulfill ⌄

Assume you select this check box, but don't define the 'Send To Queue' option (leave it blank), then you can push sales order release(s), job material(s), or transfer order line(s) to the fulfillment queue. For example, assume you enter a sale order for '10' units of part 'DCD-100-SP'. If you select the 'Enable Sales Orders' check box, then:

1. Enter a sales order and define its line(s) and release(s).

   To learn how to create a sales order, review theCreating Sales Orders article.

2. On your order, select the **Line/Releases/Detail** node in the Nav tree.

   The Release Detail card displays.

3. Select **Fulfillment Queue Actions** button for your sales order release.

The 'Fulfillment Queue Actions' panel displays.

Fulfillment Queue Actions   ×

Queue Action   ⌄

4. Inside the panel, select **Send to fulfillment queue** in the Queue Action field.

5. Select **OK**.

This example follows 'Example #1'.

If you select **Ready to Fulfill** in the 'Send to Queue' field, then a sales order release, job material, and transfer order line will go to the queue the moment you set it to 'Ready to Fulfill'.

> For example, assume you enter a sale order for '10' units of part 'DCD-100-SP'. If you select the 'Enable Sales Orders' check box and then select the 'Ready to Fulfill' option then Kinetic will send the sales order release to the fulfillment queue the moment you set it to 'Ready To Fulfill'.
>
> 1. Enter a sales order and define its line(s) and release(s).
>
> 2. On your order, select the **Release Detail** node in the Nav tree.
>
>   The Detail card displays.
>
> 3. Select the **Ready To Fulfill** check box.
>
>   Options
>   ☑ Firm Release
>   ☑ Ready To Fulfill
>
> 4. Select **Save**. 💾

ⓘ   The Fulfillment Queue group box displays the **In Queue** status.

You set a job material to 'Ready to Fulfill' in the 'Job Entry' app in the following location:

You set a transfer order and its line to 'Ready to Fulfill' in the 'Transfer Order Entry' app in the following locations:

'Fulfillment Queue' is specific to the 'Load Queue' functionality. It allows you to 'Send to Queue' a sales order release, job material, or transfer order line. If you leave the 'Send to Queue' field blank, then you must send a sales order release to the 'Fulfillment Queue' manually. However, if you set this field to 'Ready to Fulfill' then a sales order release, job material, or transfer order line is sent to the 'Fulfillment Queue' the moment you mark your sales order as 'Ready to Fulfill '. When items are marked as 'Send to Queue', then they are copied to a table called 'PartAllocQueue', where they wait to be processed by the 'Automated Fulfillment Process'. They are processed in order of how they are sent to the queue and utilize the rules of the 'Fulfillment Workbench' app to allocate the quantity.

Selecting this check box or defining the field does not affect the 'Automated Fulfillment' setup. It is an additional way to sent specific orders, jobs, or transfer

> ⚠️ orders to the fulfillment queue for processing.

7. In the Send to Queue field, select the **Ready to Fulfill** option for jobs, sales orders, or transfer orders.

Fulfillment Queue

☑ Enable Jobs	☑ Enable Sales Orders	☑ Enable Transfer Orders
Send to Queue Ready to Fulfill	Send to Queue Ready to Fulfill	Send to Queue Ready to Fulfill

8. Select **Save**. 💾

9. Exit the Site Configuration Control app.

10. You can also set up sales order, transfer order, and inventory (job material) fulfillment at the 'Company' level.

    If you set up 'Ready To Fulfill' at the company level, it will override the 'Site' settings. To do so:

    1. Open the **Company Configuration** app.

    2. In the Nav tree, select the **Production** node.

       The Job card displays.

3. Select the **Ready To Fulfill** check box if you want to automatically fulfill job materials.

4. Select **Save**.

5. In the Nav tree, select the **Materials** node.

The Inventory card displays.

6. Select the **Ready To Fulfill** check box if you want to automatically fulfill transfer orders.

7. Select **Save**.

8. In the Nav tree, select the **Sales** node.

9. Scroll down to locate the **Order** card and expand it.

10. Select the **Ready To Fulfill** check box if you want to automatically fulfill transfer sales orders.

11. Select **Save**.

Creating a Rule Master

You can create a master fulfillment rule an link it to multiple rule class records. This way you don't have to recreate the same rule for your automated fulfillment. For example, assume you need to allocate specific sales orders and this requires you to define multiple rules. Since some of the rules are identical, you define a single syntax using the 'Automated Fulfillment Rule Master' app and link the master rule to the rule that requires this syntax in the 'Automated Fulfillment Rules' app.

Allows for template rules or frequently used rules that are added to multiple rules classes. When a master rule is added to a rule class, it is marked as 'Sync from Master' and 'Linked'. Changes can only be made to this rule in the 'Automated Fulfillment Rule Master' app and flow down to any rule class the master rule is used in, unless you clear 'Sync From Master'. If 'Sync From Master' is selected, then any changes are made directly to the rule in the rule class and only impact the single rule.

To create a master rule:

1. Open the **Automated Fulfillment Rule Master** app.

   The Landing page displays. The page displays all the existing records.

2. Select **New Master Rule**. ⊕

   The Master Rule Details card displays.

3. Enter **Master Rule ID** and **Description** for your master rule.

4. Next, select the master rule action using the **Action** field.

   The action dictates what you want the rule you link the master record to do. For example, you wan to search for sales orders. As a result, you select the 'Search Orders' option.

   - **Load Queue** - Takes orders marked 'Send to Queue' and puts them on the 'PartAllocQueueInfo' table for further evaluation with other rules.

   - **Search Orders** - Searches the 'OrderRel' (Order Release) table.

- **Search Jobs** - Searches the 'JobMtl' (Job Material) table.

- **Search Transfers** - Search the 'TFOrdDtl' (Transfer Order Detail) table.

- **Search Demand** - Searches the 'PartDtl' table which holds demand from various tables. Its common to view this data in the 'Time Phased Inquiry' app.

- **Select** - Mimics the manual action in the 'Fulfillment Workbench' app of selecting the 'Select' check box.

- **Deselect** - Mimics the manual action in the 'Fulfillment Workbench' app of clearing the 'Select' check box.

- **Sort** - Mimics the manual action in the 'Fulfillment Workbench' app of clicking the column 'Headers' and sorting data.

- **Delete** - Removes data from the 'PartAllocQueueInfo' table so it cannot be 'Allocated'.

- **Postpone** - The data remains on the 'PartAllocQueueInfo' table but is deselected so it cannot be 'Allocated'.

- **Allocate Jobs/Allocate Orders/Allocate Transfers** - Mimics the manual 'Allocate' action located in the 'Overflow' menu of the 'Fulfillment Workbench' app.

- **Release for Picking** - Mimics the manual 'Release to Picking' action located in the 'Overflow' menu of the 'Fulfillment Workbench' app.

- **Unreserve** - Unreserves the previously reserved quantity and sets it back as 'To Fulfill'.

- **Unallocate** - Unallocates the previously allocated quantity and sets it back as 'Reserved'.

- **Unallocate and Unreserve** - A combination of the two actions that sets the quantity back to the beginning before any reservation/allocation has taken place.

5. Select **Allocation Template** and select a **Query ID** if required.

> ℹ️ You don't have to select values in these fields. If you do and link the rule master record to your rule using the 'Automated Fulfillment Rule' app, then the 'Allocation Template' and 'Query' defaults to the linked rule. The same logic

> ℹ️ applies to the expression you enter on you rule master record. The advantage is that you define one master part record and link it to multiple rules. This way you don't have to define values/expressions each time you enter a new rule.

> ℹ️ To learn about how to create rules for the automated fulfillment, review the Creating Automated Fulfillment Rules article.

6. To define a rule syntax, select **Expression**.

    The Expression Editor displays.

    This is the blue button located in the top right-hand corner of the app.

7. Using the Expression Editor, enter the expression for your master rule

    You enter and expression using the 'SQL' programming language. To enter an expression use the 'Data' pane and 'Calculator'. The added syntax will display in the 'Editor' panel as you build it.

> For example, you want to auto-allocate orders the moment you enter them, but only orders for a specific customer, since the customer places the most of your company orders. As a result, you enter a syntax to accommodate this scenario.
>
> You can enter rules for the following:
>
> - Site
>
> - Fulfillment Priority
>
> - Warehouse
>
> - Days prior and Days After
>
> - Order Date
>
> - Need By Date
>
> - Ship By Date
>
> - Order/Order Line Value (the highest value gets prioritized first
>
> - Order/Order Line Margin (calculate margin of Order/Order line)
>
> - Customer Group
>
> - Customer Group Priority
>
> - Part (range)
>
> - Ship Via
>
> - Ship To ID
>
> - Ship To City
>
> - State
>
> - Zip
>
> - Country
>
> - Sold To
>
> - Cust PO
>
> - Project ID

> - Part Attributes (For example, 'Dynamic Attributes' to distinguish a grade of a part or material)
>
> - Planning Contracts
>
> - Product Group Priority
>
> - Part Priority
>
> - Manufacturing Lead Time/Purchasing Lead Time. For example, assume you cannot manufacture or purchase a part a within the Ship By date. As a result, you enter a rule to exclude the part from auto-allocations, otherwise you have Kinetic to create a cross-dock override transaction.
>
> - Expiration Date
>
> - Minimum Inventory Value. For example, you have Kinetic not allocating inventory for a part that is below the minimum level.

8. Don't forget to check syntax before you exit the Expression builder.

   This is the 'Check Syntax' button.

9. Select **Save**.

   Now that you entered a master rule, you can select it for your rule. You create a new rule next.

10. When you are done, exit the Automated Fulfillment Rule Master app.

Creating a Rule

Each rule you create belongs to a rule class. Each rule class can hold multiple rules. In summary:

- You create a rule class and add rules that you want the 'Automated Fulfillment Process' to consider.

- You can link each rule to a rule master. The rule master can hold an 'Action', 'Allocation Template', 'Query', and syntax that you define in the 'Expression Editor'. Again, you can define/select these values at the master rule level and link it to your rule, or you define it directly at the rule level. In this case, you will not select a master rule. The advantage of defining a master rule and linking it to your rule is that you don't have to define these information for each rule you enter. This is particularly true to a syntax. Imagine you have to define a syntax/expression for each rule, especially if the expression is too complex.

- If you link a master rule to your rule, then all the data you set at the master level default to the rule you link it to.

> ℹ️ To learn more about how to set up a rule, review the [Creating Automated Fulfillment Rules](#) article.

Next, create a new rule class a define a rule.

1. Open the **Automated Fulfillment Rule** app.

   The Landing page displays.

2. Select **New Rule Class.** ⊕

   The Rule Class card displays.

   If you want to select an existing rule class record, select the rule class link in the Landing page grid.

3. Enter an ID that identifies a record you are creating in the Rule Class ID field.

4. Next, enter a description for your record in the Description field.

5. Select **Save.** 💾

6. On the Rules card, select **New Rule.** ⊕

7. In the Nav tree, select the **Rules > Rule Details** node.

   The Rule Details card displays.

8. Enter a rule ID using the Rule ID field.

9. If you want to link your rule to a master rule, search for and select a master rule record in the Master Rule ID field.

    If you do this then all the other fields populate with values. This is because you entered those values at the 'Master Rule' level.

10. If you are not linking the rule to a master rule, define the rule description in the Description field.

    Notice that Kinetic assigned a sequence number to your rule. This is the 'Sequence' field. If your entered the first rule then the sequence number would be '1'. Each rule you add to your class will have a new sequence number. You learn how to rearrange sequencing in the next task.

11. Next, select **Action** and **Allocation Template**.

    The same as with entering a master rule, you select the action you want the 'Automated Fulfillment Process' to consider. For instance, select the 'Transfer Search' action. If you do so then Kinetic would search for transfer orders. You can then enter an expression telling Kinetic what transfer orders the app needs to search for. For example, you want to search only for transfer orders that belong to a particular part. Of course, as previously mentioned, you would have to specify this in the expression or select a query record relevant to this action.

    The 'Automated Fulfillment Rules' app will use data that is loaded to the table 'PartAllocQueueInfo'. The 'PartAllocQueueInfo' table is populated from a series of 'Actions' ('Load Queue', 'Search Orders', 'Search Jobs', 'Search Transfers', 'Search Demand', and so on). After data is copied into the 'PartAllocQueueInfo' table, the rules will assess the data in this table and take action on the data.

    Each action is specific to a single table. If the criteria for the action requires search or selecting on additional tables, then you must create a 'Query' and add it to the specific rule. When you create a 'Query', then its first table must be the main table the action uses. For example, if criteria will be added to the 'Search Order' action that is not on the 'OrderRel' table, then a query must be specified on the action where the first table in the query is 'OrderRel'.

    > ℹ️ If you set an allocation template in the 'Site Configuration' app, then it is not required on any rule. If you have not set an allocation template at the 'Site Configuration' level, then one will need to be set on a rule in the rule class.

12. Select **Expression** to launch the Expression Editor.

    This is the blue button located in the top right-hand corner of the app.

13. Define an expression for your action.

The syntax you enter depends on what you want the rule to do.

14. If you are unable to create a syntax for your rule, for example the syntax you enter is not referenced by the 'Data' value in the 'Expression Editor', then select the 'Query ID' that holds the database query you want the 'Automated Fulfillment Process' to consider when you run it.

15. Select **Save**. 💾

    You can enter as many rules as you need. Remember, each rule will include a sequence number. You will learn about sequencing next.

16. Remain in the Automated Fulfillment Rule app.

Resequencing Rules

As already mentioned, you can enter multiple rules for your rule class. Once you select the rule class in the 'Automated Fulfillment Process' app, the process would run those rules based on a specific rule sequence you define in the 'Automated Fulfillment Rule' app.

> ℹ️ For example, assume your rule class holds '4' rules as follows:
>
> - Order Search (Action) - For this rule you would specify an expression telling Kinetic to search for orders that are due on a certain date. You would enter an expression for this rule specifying what orders Kinetic needs to search for. You don't need an allocation template for this rule.
>
> - Load Queue (Action) - This rule tells Kinetic to load the sales orders marked as 'Send to Queue'.
>
> - Allocate Orders (Action) - This rule tells Kinetic to allocate orders using the selected allocation template.
>
> - Release for Picking (Action) - This rule tells Kinetic to release the allocated orders to picking so the items are picked and shipped to a customer. You don't need to specify an allocation template here.
>
> Each rule above belongs to the same rule class and each holds a sequence number. You can rearrange the rule sequence using drag and drop on the grid view by grabbing the further left column. The sequence is how the 'Automated Fulfillment Process' will process the rules. In this example, it would first search for orders based on the criteria you set, then take the orders marked 'Send to Queue', then allocate all of the orders it finds and finally release the orders to picking.

Next, learn how to re-sequence the entered rules.

1. In the Automated Fulfillment Rule app, select the **Details > Rules** node in the Nav tree.

    The Rules card displays.

2. Review the rules and notice each rule holds a sequence number.

    This is the 'Sequence' column on the card's grid.

3. Next, click on the Sequence icon, hold down you mouse key, and move the sequence icon up/down the sequence order inside the grid.

You can rearrange the rules sequence as required. Remember, the 'Automated Fulfillment Process' will process the rules in the sequence order you define.

4. When you are done, select **Save.**

5. Exit the Automated Fulfillment Rules app.

Run the Automated Fulfillment Process

When you complete entering your rules, run the 'Automated Fulfillment Process'. The process will consider all the rules that belong to the rule class you select in this app. You can run the process continuously, meaning the process will always process the orders when you enter it and set it to 'Ready to Process' in the 'Order Entry' app, or you can run it multiple times a day and don't attach it to a schedule. It all depends on your business needs.

For example, if you run the process in the 'Continuous' mode, then it runs based on the rules belonging to the selected rule class, and depending on what those rules are, it always fulfills sales orders, transfer orders, and jobs.

Again, this depends what you want to fulfill and how you set up your rules.

When you execute the 'Automated Fulfillment Process', then Kinetic will evaluate sales orders that were sent to the queue or selected from the search orders action in automated rule search line and release on a sales order. When you run the process without defines a Rule ID, then the process will review each record that was marked as 'Send to Queue' and utilize the rules of the 'Fulfillment Workbench' to allocate quantity. If you specify a Rule ID, then the process will review data found in

the 'Automated Fulfillment Rules' where the action type is either 'Load Queue', 'Search Orders', 'Search Jobs', 'Search Transfers', 'Search Demand' or a combination of the 'Load Queue' and 'Search Actions'. Next, the process will take that data set and evaluate it using the next rules in the 'Rule Class' to determine what is available to allocate quantity. Therefore, by setting up the automation rules you can decide the order in which 'Kinetic' should automatically allocate order lines and release them to picking.

To run the process:

1. Open the **Automated Fulfillment Process** app.

2. If you want to run the process continuously, select the **Continuous Processing** check box.

   > **i** If this continuous task stops in the task agent, it still runs on the application server. When this occurs, you will see a message in the **Epicor ICE Task Agent Service** event log that states the task continued running on the server. You can access this log from **Task Agent Configuration**. Because this message is a warning, you can also view it in the **System Monitor**.

3. Select the **Fulfill Demand Warehouse** only check box if you want to fulfill using a demand warehouse.

   The demand warehouse is the warehouse displayed on the order release, job material, or transfer order line. The process would use inventory balances found only in the demand warehouse designated for the part.

   > **i** This selection does not release the items to the 'Material Queue' for immediate picking. The 'Rule Class' you select in this app would have to have a rule that holds the 'Release For Picking' action.

4. In the Rule Class field, search for and select the rule class you want the process to consider.

5. Enter a value in the Delay (Minutes) field if yo want the process to delay.

   For example, if you enter a value of '60' in this field then the process runs in the background with a '60' minute delay between each process run. Enter a value in this field if you run the process in a continuous mode.

6. Verify the Lof Filename field defaults to **AutomatedFulfillment.log**.

   The log file shows you the sequence of the process. You can use the generated log to trouble shoot the process if it completes with errors.

7. Expand the **Filter** card and search for and select a specific site.

The process will only run the database for the site yo select here. The default is 'All Sites', meaning the process considers all the sites in your company.

8. Expand the **Advanced** card.

9. Select a schedule for you process run in the Schedule field.

   The options include 'Now', 'Startup Task Schedule', 'Interval Processing' and any other user-defined schedules created for your company.

10. If you want the process to run on a repeating basis then select the **Recurring** check box.

11. Finally, select **Process**.

12. Exit the Automated Fulfillment Process app.

> ⓘ Using the 'System Monitor' app, verify whether you process completed successfully. To locate the app, select the 'Notifications' icon on the 'Menu' bar and select the 'System Monitor' icon.
>
>

Running the Automated Fulfillment Process

If you do not select a rule class when running the 'Automated Fulfillment Process', then the process will utilize the 'Fulfillment Workbench' logic to allocate data with the data marked as 'Send to Queue'. When a rule class is defined, the process will allocate based on the rules in the rule class.

> ⓘ Refer to the Creating Automated Fulfillment Rules article to learn how to enter a rules class and rules.

When you execute the 'Automated Fulfillment Process', then Kinetic will evaluate sales orders that were sent to the queue or selected from the search orders action in automated rule search line and release on a sales order. When you run the process without defining a Rule ID, then the process will

review each record that was marked as 'Send to Queue' and utilize the rules of the 'Fulfillment Workbench' to allocate quantity. If you specify a Rule ID, then the process will review data found in the 'Automated Fulfillment Rules', where the action type is either 'Load Queue', 'Search Orders', 'Search Jobs', 'Search Transfers', 'Search Demand' or a combination of the 'Load Queue' and 'Search Actions'. Next, the process will take that data set and evaluate it using the next rule in the 'Rule Class' to determine what is available to allocate quantity. Therefore, by setting up the automation rules you can decide the order in which 'Kinetic' should automatically allocate order lines and release them to picking.

> ℹ️ In Kinetic, you can automate fulfillment of sales orders, jobs, and transfers by activating the auto-fulfillment in the 'Site Configuration' app and setting up automated fulfillment rules depending how and what you want to allocate.
>
> - To learn about setting up automated fulfillment, review the Setting Up Automated Fulfillment article.
>
> - To learn about how to create rules for auto-fulfillment, review theCreating Automated Fulfillment Rules article.
>
> - To learn about how the manual fulfillment works, review the Using Fulfillment Workbench article.

> ℹ️ To be able to automate the 'Fulfillment' in Kinetic, you must first:
>
> - Install the 'Advanced Material Management' (AMM) license.
> - Set the site you are working in to auto-fulfillment.

To run the process:

1. Open the **Automated Fulfillment Process** app.

2. Select the **Continuous Processing** check box if you want the process to run on a continuous basis.

3. Select the **Fulfill Demand Warehouse Only** check box if you want to fulfill using a demand warehouse.

   The demand warehouse is the warehouse displayed on the order release, job material, or transfer order line. The process would use inventory balances found only in the demand warehouse designated for the part.

   > ℹ️ This selection does not release the items to the 'Material Queue' for immediate picking. The 'Rule Class' you select in this app would have to have a rule that holds the 'Release For Picking' action.

4. In the Rule Class field, search for and select the rule class you want the process to consider.

5. Specify the if you want the process to delay by entering a value in the **Delay (minutes)** field.

> ℹ️ For example, if you enter '60' in this field then the process runs in the background with a '60' minute delay between each process run.

6. Verify the Log Filename field defaults to **AutomatedFulfillment.log**.

7. Expand the Filter card to be able to select a specific site relevant to the process run.

> ℹ️ The default is **All Sites**, meaning the process considers all the sites in your company.

8. Expand the **Advanced** card.

9. Using the **Schedule** field, select a schedule.

> ℹ️ This field specifies a list of schedule options during which you would like the process to run. The options include Now, Startup Task Schedule, Interval Processing and any other user-defined schedules created for your company.

10. Select the **Recurring** check box to indicate that the process should be run on a repeating basis.

11. Select **Process**. ⚙️

> ℹ️ Using the 'System Monitor' app, verify whether you process completed successfully. To locate the app, select the 'Notifications' icon on the 'Menu' bar and select the 'System Monitor' icon.
>
>

Creating Automated Fulfillment Rules

Use the **Automated Fulfillment Rules** app to allow Kinetic to automatically fulfill sales orders, transfer orders, and jobs bypassing manual fulfillment using the 'Fulfillment Workbench' app.

For example, you build rules used by Kinetic to allocate specific sales order releases once you run the 'Automated Fulfillment Process'. However, you can also create rules for fulfilling jobs and transfer orders. For a complete list of rule actions, review the 'List of Actions' in this article.

> ℹ️ You can also learn how to set up an automated fulfillment rule in the Setting Up Automated Fulfillment article.

Each rule you create belongs to a rule class. Each rule class can hold multiple rules. In summary:

- You create a rule class and add rules that you want the 'Automated Fulfillment Process' to consider, depending on what you want to fulfill (orders, jobs, transfers).

- You can link each rule to a rule master. The rule master holds 'Action', 'Allocation Template', 'Query', and 'Expression' values. Again, you can define/select these values at the master rule level and link it to your rule, or you define it directly at the rule level. The advantage of defining a master rule and linking it to your rule is that you do not have to define the same values for each rule you enter. This is particularly true for a syntax (expression). You can define a syntax at the master level and link it to multiple rules as required.

- If you link a master rule to your rule, then all the data you set at the master level default to the rule you link it to.

- Each rule holds an action, defining what the rule need to do.

  - **Load Queue** - Takes orders marked 'Send to Queue' and puts them on the 'PartAllocQueueInfo' table for further evaluation with other rules.

  - **Search Orders** - Searches the 'OrderRel' (Order Release) table.

  - **Search Jobs** - Searches the 'JobMtl' (Job Material) table.

  - **Search Transfers** - Search the 'TFOrdDtl' (Transfer Order Detail) table.

  - **Search Demand** - Searches the 'PartDtl' table which holds demand from various tables. Its common to view this data in the 'Time Phased Inquiry' app.

  - **Select** - Mimics the manual action in the 'Fulfillment Workbench' app of selecting the 'Select' check box.

  - **Deselect** - Mimics the manual action in the 'Fulfillment Workbench' app of clearing the 'Select' check box.

- **Sort** - Mimics the manual action in the 'Fulfillment Workbench' app of clicking the column 'Headers' and sorting data.

- **Delete** - Removes data from the 'PartAllocQueueInfo' table so it cannot be 'Allocated'.

- **Postpone** - The data remains on the 'PartAllocQueueInfo' table but is deselected so it cannot be 'Allocated'.

- **Reserve from All Warehouses** - Creates a reservation at the order, part and release levels based on inventory balances found in all warehouses of the current site. This selection does not release the items to the 'Material Queue' for immediate picking. If there is sufficient stock, then Kinetic creates a reservation that decrements the overall available quantity by the ordered amount for the part at the warehouse/part level, down to the order and line. If the main warehouse does not have enough quantity (Partial Quantity), then this action reserves the quantity from all other warehouses.

- **Reserve from Primary Warehouse Only** - Creates a reservation based on inventory balances found only in the primary warehouse designated for the ordered part using the ' Detail' card located in the 'Part' app. This action only reserves quantity that the 'Main' warehouse includes in its inventory. If there is not inventory, then nothing gets reserved.

- **Reserve from Demand Warehouse Only** - Creates a reservation against a warehouse included on the order release, job material or transfer order line. Kinetic releases the reserved items to the 'Material Queue', making them ready for immediate picking and printing of pick tickets. For the quantity to be reserved, the warehouse needs to include inventory as Kinetic does not take inventory from other warehouses.

- **Allocate Jobs/Allocate Orders/Allocate Transfers** - Mimics the manual 'Allocate' action located in the 'Overflow' menu of the 'Fulfillment Workbench' app.

- **Allocate Demand** - When you select this action on your rule, then Kinetic will allocate all the entered demand (Sales Orders/Transfer Orders/Jobs).

- **Release for Picking** - Mimics the manual 'Release to Picking' action located in the 'Overflow' menu of the 'Fulfillment Workbench' app.

- **Unreserve** - Unreserves the previously reserved quantity and sets it back as 'To Fulfill'.

- **Unallocate** - Unallocates the previously allocated quantity and sets it back as 'Reserved'.

- **Unallocate and Unreserve** - A combination of the two actions that sets the quantity back to the beginning before any reservation/allocation has taken place.

> ⚠️ To use the 'Automated Fulfillment Rule' app, you must install the 'Advanced Material Management' license.

Let's look at the example of automated order allocation.

First, you define a new rule class that holds '5' rules as follows:

Seque...	Rule ID
1	Search
2	Sort
3	Select
4	SelectCust
5	Allocate

Notice that the rules include a sequence number used by the 'Automated Fulfillment Process' app to run the rules in a specific order. You can re-sequence the rules as required.

The rules used in this example are as follows:

- **Search** - This rule will retrieve all the sales orders that include open releases with the need by date that is out '30' days from today.

  In this case the rule includes an expression that retrieves the order releases. If you don't define an expression using the 'Expression Builder' then Kinetic will retrieve all the open sales order releases.

- **Sort** - Once the open sales orders releases are retrieved by Kinetic, I want to sort the releases out based on the 'Need By' date in an ascending order. Again, the rule is created to do this using the 'Expression Builder'.

- **Select** - The next rule indicates that you want to select the subset of the retrieved and sorted records using a query you can select in the 'Query ID' field.

  You create queries using the 'Business Activity Query' app.

  For more information about how to create a query, review the Creating a New Query article.

  In this example, we use a query but you can create an expression instead. The created query tells Kinetic to find parts that hold the 'Material Analysis' code of 'Test'.

- **Select Customer** - Next, we want Kinetic to select base on customer. In this case, we also want the orders for the 'Garden' and 'Northern' customers. We do this by creating an expression using 'Expression Builder'.

- **Allocate** - This rule tell Kinetic to allocate sales order releases that meet the previously defined criteria.

For this rule you need to select the allocation template you want to use to allocate your sales order releases. If you don't select the allocation template at the rule level, Kinetic will use the allocation template you define for your site in the 'Site Configuration Control' app.

ℹ️ To learn about how to set up allocation templates in Kinetic, review the Creating Allocation Templates article.

This example is similar to automated order fulfillment and includes '5' rules.

1. You need to fulfill only jobs that hold a material requirement tied to a certain date and for a specific site. As a result, you would enter a rule that retrieves the required jobs. This rule would hold the sequence #1.

2. Next, you want to fulfill open transfer orders in your site but only ones tied to a specific date. As a result, you would create a rule for it. This rule would hold the sequence #2.

3. Next, you want Kinetic to select the retrieved jobs and transfer orders records. This rule would hold the sequence #3.

4. At this point, Kinetic retrieved the required jobs and transfer orders. Next, you want Kinetic to allocate the transfer orders compatible with the rule you entered. This rule would hold the sequence #4.

> ℹ️ Kinetic uses the allocation template set in the 'Site Configuration' app.

5. Finally, you want Kinetic to allocate the jobs compatible with the rule you entered. This rule would hold the sequence #5.

> Kinetic uses the allocation template set in the 'Site Configuration' app.

You can also set up User Defined (UD) fields to simplify the auto-fulfillment process in Kinetic.

This example shows a user defined check box called **Always Allocate**. The check box was added to the 'Part' and 'Customer' apps.

- **Part Maintenance**

- **Customer Entry**

Now, assume you have '100' parts and '20' customers you always want to auto-fulfill. Instead of creating multiple-rules, telling Kinetic to auto fulfill if the part is A, B, C, and so on or a customer is 1,

2, 3, and so on, you create a single rule that tells Kinetic to fulfill if the 'Always Allocate' check box is selected, no matter what part or customer.

> ℹ️ As a result of the added check box, the 'Part' and 'Customer' tables include a 'UD column'.
>
> In Kinetic, you first create a UD table and add it to an existing system table. You can then add a column(s) you need like a Boolean true/false column, for instance. Next, you must regenerate the data model to add the part and customer tables and its columns to the database. Finally, you then use the 'Application Studio' and add a check box component that links to the customer or part UD table and column.
>
> To learn more about how to add user defined columns, refer to the Creating User-Defined Columns article.

In this article, you learn about:

- [Creating a new rule](#)

- [Resequencing rules](#)

- [Testing rules](#)

- [Copying a rule class](#)

Creating a Rule

To create a new rule:

1. Open the **Automated Fulfillment Rule** app.

   The Landing page displays.

2. Select **New Rule Class**. ⊕

   The Rule Class card displays.

   If you want to select an existing rule class record, select the rule class link in the Landing page grid.

3. Enter an ID that identifies a record you are creating in the Rule Class ID field.

4. Next, enter a description for your record in the Description field.

5. Select **Save**. 💾

6. On the Rules card, select **New Rule**. ⊕

7. In the Nav tree, select the **Rules > Rule Details** node.

   The Rule Details card displays.

8. Enter a rule ID using the Rule ID field.

9. If you wan to link your rule to a master rule, search for and select a master rule record in the Master Rule ID field.

Rule Details

Rule ID *

Master Rule ID

Description

Sequence *
1

Action *

If you do this then all the other fields populate with values. This is because you entered those values at the 'Master Rule' level.

> ℹ️ You can create a master allocation rule an link it to multiple rule class records. This way you don't have to recreate the same rule for your automated fulfillment. For example, assume you need to allocate specific sales orders and this requires you to define multiple rules. Since some of the rules are identical you define a single syntax using the 'Automated Fulfillment Rule Master' app and link the master rule to the rule that requires this syntax in the 'Automated Fulfillment Rules' app.

10. If you are not linking the rule to a master rule, define the rule description in the Description field.

   Notice that Kinetic assigned a sequence number to your rule. This is the 'Sequence' field. If your entered the first rule then the sequence number would be '1'. Each rule you add to your class will have a new sequence number. Kinetic processes the rules in a sequence order.

Rule Details

Rule ID *

Master Rule ID

Description

Sequence *
1

Action *

11. Next, select **Action** and **Allocation Template**.

   The same as with entering a master rule, you select the action you want the 'Automated Fulfillment Process' to consider. For instance, select the 'Transfer Search' action. If you do so then Kinetic would search for transfer orders. You can then enter an expression telling Kinetic what transfer orders the app needs to search for. For example, you want to search only for transfer orders that belong to a particular part. Of course, as previously mentioned, you would have to specify this in the expression or select a query record relevant to this action.

When you execute the 'Automated Fulfillment Process', then Kinetic will evaluate sales orders that were sent to the queue or selected from the search orders action in automated rule search line and release on a sales order. When you run the process without defines a Rule ID, then the process will review each record that was marked as 'Send to Queue' and utilize the rules of the 'Fulfillment Workbench' to allocate quantity. If you specify a Rule ID, then the process will review data found in the 'Automated Fulfillment Rules' where the action type is either 'Load Queue', 'Search Orders', 'Search Jobs', 'Search Transfers', 'Search Demand' or a combination of the 'Load Queue' and 'Search Actions'. Next, the process will take that data set and evaluate it using the next rules in the 'Rule Class' to determine what is available to allocate quantity. Therefore, by setting up the automation rules you can decide the order in which 'Kinetic' should automatically allocate order lines and release them to picking.

> ℹ️ The 'Allocation Template' field only activates if you select the 'Allocate Orders', 'Allocate Jobs', or 'Allocate Transfer' option in the 'Action' field.
>
> To learn about how to set up allocation templates in Kinetic, review the Creating Allocation Templates article.

12. Select **Expression** to launch the **Expression Editor**.

> ℹ️ This is the blue button located in the top right-hand corner of the app.

13. Define an expression for your action.

> ℹ️ The syntax you enter depends on what you want Kinetic to do. For example, you want Kinetic to retrieve only sales order releases with the 'Need By' date in an ascending order.

14. If you are unable to create a syntax for your rule, for example the syntax you enter is not referenced by the 'Data' value in the 'Expression Editor', then search for and select a 'Query ID' that holds the database query you want the 'Automated Fulfillment Process' to consider when you run it.

> For more information about how to create a query, review the Creating a New Query article.

15. Select the **Fulfill Using Demand Warehouse Only** check box if required to have the app calculate the **Order Fill %**, **Available To Fulfill %**, and **Available Inventory** values once you run the Test Rule process.

   - You can select this check box for any action apart from the **Reserve from All Warehouses** and **Reserve from Primary Warehouse Only** actions.

   - If you select this check box and run the 'Test Rules' process once you create your rules with specific actions, then the app would calculate the **Order Fill %**, **Available To Fulfill %**, and **Available Inventory** values for the 'Demand' warehouse only.

		Select	Fulfillmen...	Demand T...	Demand D...	Order Fill %	Avail To Fulfill %	Available Inventory

Test Results

To locate the 'Available Inventory' field, you must scroll to the right on the 'Test' Results' card as this screen shot has been adjusted.

For example, assume you have 'Part-A' stocked in three different warehouses with the following quantity:

  a. Warehouse A (Demand Warehouse) - Qty 50.00

  b. Warehouse B (Standard Warehouse) - Qty 100.00

  c. Warehouse C (Standard Warehouse) - Qty 100.00

Next, you have a sales order for '100' units of 'Part-A' and your sales order release is tied to 'Warehouse A'. If you select the 'Fulfill Using Demand Warehouse Only' check box for your rule and run the 'Test Results' process, then the app would calculate the following values:

  a. Order Fill % - 50

  b. Available To Fulfill % - 50

  c. Available Inventory - 50

If you clear the 'Fulfill Using Demand Warehouse Only' check box for your rule and run the 'Test Results' process, then the app would calculate the following values:

  a. Order Fill % - 100

  b. Available To Fulfill % - 100

  c. Available Inventory - 100

- This check box automatically selects if you select the **Fulfill Using Demand Warehouse Only** check box located on the 'Rule Class' card.

- This check box only activates if you select the **Use Rule Option Values** check box located on the 'Rule Class' card.

> ⚠️ If you select this check box at the 'Rule Class' level, then each rule you enter for this 'Automated Fulfillment Rule Class' will use 'Rule Option Values' specified on each rule to set the options in the Fulfillment Workbench ('Calculate Fulfillment on Search', 'Fulfill Using Demand Warehouse Only', and 'Refresh All Records On Action') prior to the execution of each rule.

16. Select **Save**. 💾

> ℹ️ You can enter as many rules you need. Remember, each rule will include a sequence number.

17. Remain in the Automated Fulfillment Rule app.

Resequencing Rules

You can enter multiple rules for your rule class. Once you select the rule class in the 'Automated Fulfillment Process' app, the process would run those rules based on a specific rule sequence you define in the 'Automated Fulfillment Rule' app.

> ℹ️ For example, assume your rule class holds '4' rules as follows:

- Order Search (Action) - For this rule you would specify an expression telling Kinetic to search for orders that are due on a certain date. You would enter an expression for this rule specifying what orders Kinetic needs to search for. You don't need an allocation template for this rule.

- Load Queue (Action) - This rule tells Kinetic to load certain demand to queue. Again, no 'Allocation Template' is required but you need to define an expression for this action so Kinetic know what to load.

- Allocate Orders (Action) - This rule tells Kinetic to allocate orders using the selected allocation template.

- Release for Picking (Action) - This rule tells Kinetic to release the allocated orders to picking so the items are picked and shipped to a customer. You don't need to specify an allocation template here.

Each rule above belongs to the same rule class and each holds a sequence number. You can rearrange the rule sequence using drag and drop on the grid view by grabbing the further left column. The sequence is how the 'Automated Fulfillment Process' will process the rules. In this example, it would first search for orders based on the criteria you set, then take the orders marked 'Send to Queue', then allocate all of the orders it finds and finally release the orders to picking.

To re-sequence rules:

1. In the Automated Fulfillment Rule app, select the **Details > Rules** node in the Nav tree.

   The Rules card displays.

2. Review the rules and notice each rule holds a sequence number.

   This is the 'Sequence' column on the card's grid.

3. Next, click on the **Sequence** icon, hold down you mouse key, and move the sequence icon up/down the sequence order inside the grid.

	Seque...	Rule ID
	1	Search
	2	Sort
	3	Select
	4	SelectCust
	5	Allocate

You can rearrange the rules sequence as required. Remember, the 'Automated Fulfillment Process' will process the rules in the sequence order you define.

4. You can also inactivate a rule by clearing the 'Active' check box for the rule you don't wan the 'Automated Fulfillment Process' to consider.

For example, your rules class include '5' rules (sequences '1', '2', '3', '4', and '5'), but you want to inactivate rule # '4' (Postpone - Action). Therefore, you inactivate the rule sequence # '4' and Kinetic will skip this rule.

5. When you are done, select **Save**.

6. Remain in the Automated Fulfillment Rule app.

Testing Rules

Once you define your rules, you can test them to see whether Kinetic will retrieve records based on the entered rules. Kinetic runs the rules in the background sequence order.

> ⚠ The app will automatically refresh fulfillment prior to and following the execution of each rule you enter for your 'Rule Class'. This will guarantee the correct **Order Fill %**, **Available To Fulfill %**, and **Available Inventory** values.

To test the rules:

1. Select the **Test Rules** icon.

The retrieved records display on the 'Test Rules' card.

Select	Fulfillment...	Demand Type	Demand Desc	Order Fill %	Avail To Fu...	MTO Avail ...	Part	Description	Rev	Need By
☑	1	Order	5435 / 1 / 1	0.00	0.00	0.00	Part1	Part1		01/16/2023
☑	2	Order	5436 / 1 / 1	0.00	0.00	0.00	Part1	Part1		01/19/2023
☑	3	Order	5438 / 1 / 1	0.00	0.00	0.00	Part3	Part3		01/23/2023

> ℹ In this case, Kinetic retrieved '3' sales orders. However, this is just an example.

2. You can also see results for an individual rule by selecting the rule and then reviewing the results.

This example includes '9' rules and we want to see results for the 'Delete' rule.

3. Remain in the Automated Fulfillment Rule app.

Copying Rule Class

You can copy an existing 'Rule Class' record to create a new 'Rule Class'. When you copy a record, all the rules that belong to that record are copied with it. For example, you want to create a new 'Rule Class' that includes '5' rules. Each of the rules includes a specific expressions (syntax). You know that one of the existing records includes some of the rules you need for your new 'Rule Class'. As a result, you copy the 'Rule Class' that includes those rules and delete/inactivate the ones you don't need. This way you don't need to create the rules again.

1. Select the **Copy** icon.

The **Copy Rule Class** panel opens.

2. Enter a **Rule Class ID** and **Description**.

3. Inside the panel, select **OK**.

4. Exit the Automated Fulfillment Rule app.

Creating Automated Fulfillment Rule Master

You can create a master fulfillment rule and link it to multiple rule class records. This way you don't have to recreate the same rule for your automated fulfillment. For example, assume you need to allocate specific sales orders and this requires you to define multiple rules. Since some of the rules are identical, you define a single syntax using the 'Automated Fulfillment Rule Master' app and link the master rule to the rule that requires this syntax in the 'Automated Fulfillment Rules' app.

Allows for template rules or frequently used rules that are added to multiple rules classes. When a master rule is added to a rule class, it is marked as 'Sync from Master' and 'Linked'. Changes can only be made to this rule in the 'Automated Fulfillment Rule Master' app and flow down to any rule class the master rule is used in, unless you clear 'Sync From Master'. If 'Sync From Master' is

selected, then any changes are made directly to the rule in the rule class and only impact the single rule.

To create a master rule:

1. Open the **Automated Fulfillment Rule Master** app.

   The Landing page displays. The page displays all the existing records.

2. Select **New Master Rule**. ⊕

   The Master Rule Details card displays.

3. Enter Master Rule ID and Description for your master rule.

4. Next, select the master rule action using the **Action** field.

   The action dictates what you want the rule you link the master record to do. For example, you want to search for sales orders. As a result, you select the 'Search Orders' option.

   - **Load Queue** - Takes orders marked 'Send to Queue' and puts them on the 'PartAllocQueueInfo' table for further evaluation with other rules.

   - **Search Orders** - Searches the 'OrderRel' (Order Release) table.

   - **Search Jobs** - Searches the 'JobMtl' (Job Material) table.

   - **Search Transfers** - Search the 'TFOrdDtl' (Transfer Order Detail) table.

   - **Search Demand** - Searches the 'PartDtl' table which holds demand from various tables. Its common to view this data in the 'Time Phased Inquiry' app.

   - **Select** - Mimics the manual action in the 'Fulfillment Workbench' app of selecting the 'Select' check box.

   - **Deselect** - Mimics the manual action in the 'Fulfillment Workbench' app of clearing the 'Select' check box.

- **Sort** - Mimics the manual action in the 'Fulfillment Workbench' app of clicking the column 'Headers' and sorting data.

- **Delete** - Removes data from the 'PartAllocQueueInfo' table so it cannot be 'Allocated'.

- **Postpone** - The data remains on the 'PartAllocQueueInfo' table but is deselected so it cannot be 'Allocated'.

- **Allocate Jobs/Allocate Orders/Allocate Transfers** - Mimics the manual 'Allocate' action located in the 'Overflow' menu of the 'Fulfillment Workbench' app.

- **Release for Picking** - Mimics the manual 'Release to Picking' action located in the 'Overflow' menu of the 'Fulfillment Workbench' app.

- **Unreserve** - Unreserves the previously reserved quantity and sets it back as 'To Fulfill'.

- **Unallocate** - Unallocates the previously allocated quantity and sets it back as 'Reserved'.

- **Unallocate and Unreserve** - A combination of the two actions that sets the quantity back to the beginning before any reservation/allocation has taken place.

5. Select **Allocation Template** and select a **Query ID** if required.

> ℹ️ You don't have to select values in these fields. If you do and link the rule master record to your rule using the 'Automated Fulfillment Rule' app, then the 'Allocation Template' and 'Query' defaults to the linked rule. The same logic applies to the expression you enter on you rule master record. The advantage is that you define one master part record and link it to multiple rules. This way you don't have to define values/expressions each time you enter a new rule.

> ℹ️ To learn about how to create rules for the automated fulfillment, review the Creating Automated Fulfillment Rules article.

6. To define a rule syntax, select **Expression**.

The Expression Editor displays.

This is the blue button located in the top right-hand corner of the app.

7. Using the Expression Editor, enter the expression for your master rule

You enter and expression using the 'SQL' programming language. To enter an expression use the 'Data' pane and 'Calculator'. The added syntax will display in the 'Editor' panel as you build it.

> For example, you want to auto-allocate orders the moment you enter them, but only orders for a specific customer, since the customer places the most of your company orders. As a result, you enter a syntax to accommodate this scenario.
>
> You can enter rules for the following:
>
> - Site
>
> - Fulfillment Priority
>
> - Warehouse
>
> - Days prior and Days After

- Order Date

- Need By Date

- Ship By Date

- Order/Order Line Value (the highest value gets prioritized first

- Order/Order Line Margin (calculate margin of Order/Order line)

- Customer Group

- Customer Group Priority

- Part (range)

- Ship Via

- Ship To ID

- Ship To City

- State

- Zip

- Country

- Sold To

- Cust PO

- Project ID

- Part Attributes (For example, 'Dynamic Attributes' to distinguish a grade of a part or material)

- Planning Contracts

- Product Group Priority

- Part Priority

- Manufacturing Lead Time/Purchasing Lead Time. For example, assume you cannot manufacture or purchase a part a within the Ship By date. As a result, you enter a rule to exclude the part from auto-allocations, otherwise you have Kinetic to create a cross-dock override transaction.

- Expiration Date

> i
>
> - Minimum Inventory Value. For example, you have Kinetic not allocating inventory for a part that is below the minimum level.

8. Don't forget to check syntax before you exit the Expression Builder.

    This is the 'Check Syntax' button.

9. Select **Save**. 💾

    Now that you entered a master rule, you can select it for your rule.

10. Exit the Automated Fulfillment Rule Master app.

WIP PCID

ou can take items that are in process (WIP) on jobs and move them around the shop floor at one time, either on a pallet or in a box/container using a PCID.

This section of the user guide covers the 'WIP PCID' functionality.

Working with PCIDs and WIP

You can take items that are in process (WIP) on jobs and move them around the shop floor at one time, either on a pallet or in a box/container using a PCID

> You must install the 'Advanced Material Management' (AMM) license.

- You operate a press and complete several jobs a day. Each job has a different follow up operation or operations. It could be a sub-assembly that is waiting for another assembly to return from paint or a sub-contract operation before it can be consumed in another operation. Moreover, some of the materials (parts) required on the following operations may be in a different warehouse, so you have to move the completed WIP goods that belong to a PCID to the next operation of to a warehouse location, since some of the WIP items may not be scheduled for the next operation for a day, a week or a month. Therefore, the WIP items that belong to a PCID need to be stored for the time being to be ready when the next operation starts.

  Note that any operation, including a sub-assembly operation, can consume WIP items from a PCID or multiple PCIDs. Operations can consume the entire PCID or just a partial required amount from a PCID.

- You are making '100' pieces of the 'Metal Bracket' part. You finish '25' but 'need to move those '25' pieces to another area in the warehouse. As a result, you assign a PCID to the '25' units, you put the parts on a pallet and roll them off to another warehouse area. At this point the items are still in WIP and linked to a PCID.

> ⚠ Before you work with 'PCIDs and WIP', Epicor recommends you learn about PCID functionality and its concept. The Kinetic help includes many PCIDs related articles. To search for the articles, enter 'Package Control' into the 'Search' window and launch the article you need.

The following rules applies:

- You can consume items that are in WIP from a PCID by issuing an entire or multiple PCIDs to a job operation.

- You can report quantity to a new or existing PCID so the PCID travels from one operation to another as the operations are being completed.

- You can ship or pick a PCID from WIP.

- You can store a PCID that is in WIP in a WIP location to use the entire or partial PCID at a later time.

- You can move a PCID from WIP to your inventory.

- A WIP PCID can contain items to satisfy multiple jobs.

You can report time and quantity against a PCID on the make direct jobs.

- You can report time and quantity against a PCID on the make direct jobs.

- You can move the PCID from WIP to shipping once the production is complete.

- You can add a PCID to your pack when shipping.

- You can batch multiple make direct jobs into a single PCID.

Activating WIP Tracking

You activate WIP tracking for a specific site using the 'Site Configuration Control' app. Activating the WIP tracking allows you to review part WIP transactions using the 'Part WIP Transaction History Tracker' app.

For example, a manufactured assembly is in WIP, because it is being produced and it is also required on another job. Therefore, once you complete the job that produces the assembly you need to issue it to the job that needs it. During this process the system creates different transactions depending where the part is in WIP. To analyse the history WIP related transaction information you review the 'Part WIP Transaction History Tracker' app.

To activate the WIP tracking:

1. Open the **Site Configuration Control** app.

2. On the landing page, select one of the site links.

> **i** To select a site, use **Search** 🔍 in the **Site** field.

3. In the Nav Tree, select the **AMM** node.

The following list of cards displays:

4. Expand the **WIP Tracking** card.

5. Select the **Track WIP Changes** check box.

> (i) To be able to select the check box, you must install the 'Advanced Material Management (AMM)' license.

6. Select **Save**. 💾

Issuing Materials to a PCID

You can issue materials 'TO' an existing PCID for a job or you can generate a new one at the time of material issuing.

> (i) You must install the 'Advanced Material Management' (AMM) license.

To issue material:

1. Open the **Issue Material** app.

2. In the **Job** field, search for and select a job using **Search**. 🔍

3. In the **Material** group box, in the **Material** field, select a material.

4. In the **Location** group box, in the **PCID** field, select a PCID.

- If the PCID you select is 'WIP PCID' then the Warehouse and Bin values will default.

- If the PCID you select is 'EMPTY' then you must define the Warehouse and Bin values.

- In summary, the 'TO' PCID must hold the status of 'EMPTY' or 'WIP PCID'.

5. In the **Location** group box, select a warehouse.

6. In the **Location** group box, select a warehouse bin.

7. If you want to generate a new PCID for the quantity you are issuing, select **Generate PCID**.

   The **Package Control ID Generator** panel opens.

   > ℹ️ This is the blue button located in the top right-hand corner of the app. The button is tied to the 'Advanced Material Management' (AMM) license.

8. In the **Package Control ID Generator** panel, define the fields below and select **Generate PCIDs**.

- Package Control Type
- Package Control ID Code
- Package Code
- Warehouse

- Number of Labels Per PCID
- Report Style
- Printer

> ℹ️ When you generate a new PCID it displays in the **PCID** field.

9. In the **Location** group box, in the **Bin** field, select a warehouse bin.

> ℹ️ You defined a warehouse in the 'Package Control ID Generator' panel.

10. On the **From** card, in the **PCID** field, search for and select an existing PCID using **Search**. 🔍

- When you issue materials then the 'FROM' PCID is reduced by the issued amount.
- The 'FROM' PCID has to be a 'STOCK' PCID and needs to include inventory.
- If the 'FROM' PCID and 'TO' PCID are the same then the inventory that is being issued has to be the only inventory in the 'FROM' PCID.

11. On the **From** card, in the **Quantity to Issue** group box, in the **Quantity** field, enter a value that represents the quantity you want to issue.

12. On the **From** card, in the **Location** group box, in the **Warehouse** and **Bin** fields, select the location values.

> ℹ️ The Warehouse and Bin values will default once you select your PCID.

13. To review the jobs the material you are issuing has been recently issued to, select **Recently Issues**.

    The 'Recent Issues' card displays. The card displays a list of jobs together with the location and previously issued material quantity. Each grid line includes the 'PCID' field so you can see the 'PCID' number the material has been issued to.

    Issue Material

    Issue Material   Recent Issues

14. Select **Save**. 💾

15. Exit the Issue Material app.

Reporting PCID Quantities

You can report quantities against your job operations using a PCID. You can also generate a new one if required.

For instance, you need to report '100' units against operation '10' of job '5544'. The job holds '4' operations. You need to associate the quantities with a PCID so you generate a new PCID using the 'Generate PCID' button. The PCID you generate is 'EMPTY' upon generation. Once you complete '100' units on operation '10', the PCID you previously generated becomes 'WIP'. In your production, going forward, you move '100' units to operation '20' of the same job. When you report '100' units towards operation '20' you select the same 'WIP' PCID. The same logic applies to operation '30'. When you report quantity towards operation '40' then the PCID changes its status to 'FINISHED GOODS'.

> You must install the 'Advanced Material Management' (AMM) license.

> In this workshop you will work in the Data Collection interface.

1. Launch **Data Collection** and log in.

2. Select **Report Quantity**.

   The **Report Quantity** panel displays.

3. In the **Job** field, find and select a job.

4. From the **Operation** drop-down, select the job operation that you're reporting the quantity against.

5. In the **Current Quantity** field, specify the quantity that you are reporting.

> The app will add the quantity you enter in this field to the Prior field value.

6. In the **PCID** field, search for and select a PCID relevant to the quantities you are reporting.

> ℹ️ If you are reporting against the operation that is not last in job's method of manufacture then you have to select a PCID that is 'EMPTY' or 'WIP'. If the operation is the last one then the PCID holds the 'FINISHED GOODS' status.

7. If you want to generate a new PCID for the quantity you are reporting then select the **Generate PCID** button.

   When you generate a PCID for the reported quantity it holds the status of 'EMPTY'. Once you confirm the reported quantity, the PCID you generated holds the status of 'WIP' and the reported quantity is associated with it.

8. Select **OK** to confirm.

Moving PCID Related Material

You can move material that is issued to a job to a PCID or you can generate a new PCID at the time of moving job material.

1. Open the **Move Material** app.

2. Select the job search button to select the job. 🔍

3. In the **Material** group box, in the **Mtl** field, select the material you want to move.

4. In the **Location** group box, select the required warehouse in the **Warehouse** field.

> ℹ The system default is the production warehouse. Since the material has been issued, the material is already in production. The same applies to a warehouse bin.

5. In the **Location** group box, select the required bin in the **Bin** search field. 🔍

6. In the **Location** group box, in the **PCID** field, select the PCID you want to move the material FROM.

> ℹ If you select a PCID and the PCID is associated with a warehouse and warehouse bin then the 'Warehouse' and 'Bin' fields update. The PCID you select must include the required material quantity. In other words, it cannot be 'EMPTY'. You can also select a 'WIP' PCID.

> ℹ You must install the 'Advanced Material Management' (AMM) license.

7. If you want to generate a new PCID for the moving quantity, select the **Generate To PCID** button.

> ℹ The PCID you generate will be associated with the quantities you are moving.

8. Scroll slightly down to locate the **To** card.

9. In the **Quantity** group box, in the **Quantity** field, enter the quantity you need to move.

> ℹ The 'Required Quantity' field located in the 'Transaction Quantity' group box shows the required amount you need to move in this material transaction.

10. In the **Part/PCID** group box, in the **To PCID** field, select a PCID you want to move the material to.

> ℹ The PCID you select can be 'EMPTY' or 'WIP'.

11. In the **Location** group box, in the **Warehouse** field, a warehouse defaults.

> ℹ If you selected a PCID then the warehouse associated with the PCID defaults. The same logic applies to the warehouse bin.

12. Select **Save**. 💾

Adjusting PCID Related Material

You can adjust the physical location or quantity of a material that belongs to a PCID. You only run this app when a material quantity record specifies one physical location, but its actual location is different.

> ⓘ The transaction for Adjust Material is of type ADJ-MTL.

1. Open the **Adjust Material** app.

2. In the **Job** group box, in the **Job** field, search for and select the job with the material being adjusted.

> ⓘ To select a job, use **Search**. 🔍

3. In the **Material** group box, in the **Material** field, select the material sequence.

> ⓘ When you select the material, the fields located in the 'Location' group box populate.

4. In the **Location** group box, specify the warehouse and bin.

> ⓘ If you are happy with the warehouse and warehouse bin defaults, skip this step. For example, if you issued material to your job then the material you issued is

> (i) already in production. As a result, the warehouse and bin would be production related by default.

5. In the **Location** group box, in the **PCID** field, search for and select the PCID you want the adjusted material amount belong to.

> (i) Your PCID can be 'EMPTY' or 'WIP'. The moment you specify the quantities and save, the adjusted amount will be moved to the PCID you select in this field.

> (i) You must install the 'Advanced Material Management' (AMM) license.

6. In the **Quantity to Issue** group box, in the **Quantity** field, enter the quantity value you want to adjust.

7. Select **Save**. 💾

Returning Assembly/Material Request From and To PCID

You can return an assembly or a material from a WIP job to stock and 'FROM' a specific PCID.

> (i) You must install the 'Advanced Material Management' (AMM) license.

1. Open the **Return Assembly Material Request** app.

2. In the **Job** field, search for and select the job that you want to return the assembly and material **FROM**.

ℹ The job number in the image is just an example.

ℹ The 'Requested Lines' grid populate with the materials that belong to the job's method of manufacture.

3. In the **Requested Lines** grid, in the **Requested Qty** column field, enter the quantity amount you want to return.

ℹ The 'From Warehouse' and 'From Bin' column fields populate. These are the locations where the job material is currently being stored. You can override the default values if required.

4. In the **From PCID** column field, search for and select the PCID you are returning the material **FROM**.

> **ℹ** You are retuning from 'WIP PCID'. If you are returning partial quantity then the PCID stays 'WIP'. If you are returning full quantity then the PCID is 'Staged-Empty'.

> **ℹ** For the **Search** icon to display, you must click inside the **From PCID** column field. Define a PCID for each requested material line.

5. Scroll to the right to locate the **To PCID** column field and search for and select the PCID you are returning the material **TO**.

> **ℹ** Again, for the **Search** icon to display, you must click inside the **To PCID** column field. Define a PCID for each requested material line.

> **ℹ** If you want to generate a new PCID then select the 'Generate PCID' button. This will open the 'Package Control ID Generator' panel where you must define the 'Package Control Type' (Static/Dynamic), 'Package Control ID Code', 'Package Code', and other details.
>
>

6. Select **Save**.

Returning Assemblies From and To a PCID

You can return a specific assembly quantity from a PCID as you are working on your job, if the assembly belongs to a PCID or multiple PCIDs.

When you return an assembly from a job, the following occurs:

- The 'Issued Quantity' and 'Total Cost' values on the job assembly record are updated with the quantity returned and extended cost.

- 'Extended Cost' is calculated as the return quantity times the current inventory 'Average', 'Standard' or 'Last' unit cost (depending on the inventory costing method).

- The 'On-hand' quantity and 'Allocated' quantity for the part in the part master file are increased by the quantity returned.

- A part transaction record is created for the part. The transaction type is 'ASM-STK' (Job Assembly Return).

1. Open the **Return Assembly** app.

2. In the **Job** field, search for and select a job from which you want to return assemblies.

> ℹ The job number in the image is just an example.

3. In the **Assembly** field, select the job assembly.

4. In the **PCID** field, search for and select the PCID where you are returning the assembly **FROM**.

⚠ You are retuning from 'WIP PCID'. If you are returning partial quantity then the PCID stays 'WIP'. If you are returning full quantity then the PCID is 'Staged-Empty'.

ⓘ You must install the 'Advanced Material Management' (AMM) license.

5. On the **To** card, in the **Quantity** field, enter the quantity amount you are returning.

To

Part
8400S-617

Description *
V-Block Mount Plate

Nbr of Pieces
0

Quantity
7

UOM
EA

Reference

---

i Don't forget to specify a warehouse and bin.

Attribute Set

Description

This Transaction
0

UOM
EA

Warehouse
Main

Bin
01-01-01

Description
CHI Finished Goods ...

PCID

---

6. If you want to return the assembly to a specific PCID then search for and select it.

> ℹ️ If you want to generate a new PCID then select the 'Generate PCID' button on the 'To' card. This will open the 'Package Control ID Generator' panel where you must define the 'Package Control Type' (Static/Dynamic), 'Package Control ID Code', 'Package Code', and other details.

7. Select **Save**.

Returning Material From and To a PCID

You can return a specific material quantity from a PCID as you are working on your job, if the material belongs to a PCID or multiple PCIDs.

When you return material from a job, the following occurs:

- The 'Issued Qty' and 'Total Cost' values on the job material or assembly record are updated with the quantity returned and extended cost.

- 'Extended Cost' is calculated as the returned quantity times the current inventory 'Average', 'Standard' or 'Last' unit cost (depending on the inventory costing method).

- If the inventory costing method is 'LotFIFO' or 'FIFO' and a part quantity is not consumed during production and is returned to inventory, the cost for the quantity is the actual 'FIFO' cost layers that were originally issued to the job material.

- The 'On-hand' quantity and 'Allocated' quantity for the part in the part master file are increased by the quantity returned.

- A part transaction record is created for the part. The transaction type is 'MTL-STK' (job material return).

1. Open the **Return Material** app.

2. In the **Job** field, search for and select a job from which you want to return material.

ⓘ The job number in the image is just an example.

3. Next, select a job assembly.

4. Now select the job material you want to return.

ⓘ Notice the warehouse and bin records default.

5. Search for and select the PCID where you are returning the material **FROM**.

> You are retuning from 'WIP PCID'. If you are returning partial quantity then the PCID stays 'WIP'. If you are returning full quantity then the PCID is 'Staged Empty'. Remember, you are moving the items 'FROM' a PCID to a non-PCID inventory location (warehouse/bin).

> You must install the 'Advanced Material Management' (AMM) license.

6. On the **To** card, in the **Quantity** field, enter the quantity amount you are returning.

Don't forget to specify a warehouse and bin.

7. If you want to return the material to a specific PCID then search for and select it.

> ⓘ If you want to generate a new PCID then select the 'Generate PCID' button on the 'To' card. This will open the 'Package Control ID Generator' panel where you must define the 'Package Control Type' (Static/Dynamic), 'Package Control ID Code', 'Package Code', and other details.

8. Select **Save**.

Adjusting WIP for a PCID

The 'Adjust WIP' app allows you to adjust the physical location or quantity of a Work In Process (WIP) part.

For example, you can move a part in WIP from one location to another. Assume you are working on a job and have the WIP in the inbound warehouse and bin of the next operation. However, another job comes along that needs to be worked on right away, and you have to move that WIP to another warehouse bin to make room for the one coming. Also assume that the job part you need to move is tied to a PCID. As a result, you move the job WIP part to the PCID till you restart production on the job again.

> ⓘ You must install the 'Advanced Material Management' (AMM) license.

1. Open the **Adjust WIP** app.

2. On the landing page, select the job you need by click on the job link in the **Job** column.

The **To** card displays.

> ℹ️ To select a job, use **Search** 🔍 in the **Job** field.

3. In the **Assembly** group box, in the **Assembly** field, select a job assembly.

> ℹ️ For example, your job includes '2' assemblies (assemblies '1' and '2'). You finished production on assembly '1', but still need to complete assembly '2'. However, since another job came in that you need to work on, you move the job quantity after you complete production on assembly '1'.

4. In the **Operation** group box, in the **Operation** field, select a job operations.

> ℹ️ For example, your job includes '5' operations (operations '10', '20', '30', '40', and '50'). You finished production on operation '30', but still need to complete operations '40' and '50'. However, since another job came in that you need to work on, you move the job quantity after you complete production on operation '30'.

5. In the **Location** group box, select the warehouse and bin locations.

6. In the **PCID** field, search for and select a PCID you want to move the quantities to.

7. Select **Save**. 💾

Reviewing the Part WIP Transaction History Tracker

If you work as a supply manager you most likely will want to review the details for the materials you've in your inventory or you've shipped. The Part WIP Transaction History Tracker provides you with access to the overall transaction history of parts that are in WIP, including PCID and attribute set details.

For example, last week you returned assembly 'STK-100' from job '5684'. Assume you returned '100' pieces . The assembly holds PCID '14'. Therefore, you returned '100' pieces from PCID '14' to your 'Main' warehouse. As a result of the material return, the system would create transaction 'ASM-STK'. When you review the tracker you can see that part 'STK-100' was returned from job '5684', it is tied to PCID '14', and it currently resides in the 'Main' warehouse.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

> ℹ️ However, the example above only shows one transaction; 'ASM-STK'. The system would create a many different transactions based on what you do with your part in WIP. For instance, if you issue material from once PCID to another the system would create a transaction. The same logic applies if you report quantities, move material, adjust material,.....and so on.

1. Open the **Part WIP Transaction History Tracker** app.

   The **Part Detail** card displays.

2. Search for and select a part.

3. Select the **Filters** button.

   The **Filter** panel opens.

   > ⓘ   This is the blue button located in the top right-hand corner of the app.

4. Using the **Filter** panel, enter the filter value you want to narrow down your transaction history.

5. Select **OK** to confirm inside the panel.

6. Verify the **WIP Transaction History** card is expanded by default.

7. Review the transaction information related to the selected part.

8. Exit the Part WIP Transaction History Tracker app.

Ending Production Activity for PCID Parts

You can end production activity and report the produced quantity against a PCID(s). When completing a production quantity, you can select an existing PCID or you can generate a new one.

Assume you need top cut a '0.2. inch groove to the 'Metal Bracket' part before you ship it to customers. Now assume you are making '1,000' units of 'Metal Bracket' and the parts are linked to 'PCID 15'. When you enter production activity on you job, you can search for and select 'PCID 15'. Next, when the system requests to move '1,000' units from your manufacturing plan to inventory - assume you are shipping only once the parts reach your warehouse - the PCID travels with the parts.

To end production activity:

1. In the **Data Collection** app select **End Activity**.

   The **End Activity** panel opens.

   > ⓘ To learn how to 'start' and 'end' production activity, review the Starting and Ending Activity in Data Collection article.

2. Select your job and operation.

3. In the **Current** group box, in the **Current** field, enter the production quantity you are completing on this job operation.

4. In the **PCID** field, search for and select a PCID you are reporting the job quantity towards.

As you are ending a job activity you can report the produced quantity to multiple PCIDs. For example, your job is for '12' units of the 'DCD-100' part and you are ending production activity for operation '10'. Assume you reported '5' units to PCID 'A' and '5' units to PCID 'B'. Your operation is not yet completed because you still need to make '2' units. When you end production activity again, you can only report '2' units, either to PCID 'A' or 'B'. You can also generate a new PCID and report the remaining '2' pieces against it. Let's say this is PCID 'C'.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

5. If the reported part is attribute tracked then define the **Attribute Set** the part is linked to.

> **i** To learn about the Attribute Sets concept, review the Understanding Attribute Sets article.

6. If there is scrap, define how many pieces you are scrapping in the **Scrap** field.

   You cannot tie a scrapped quantity to a PCID.

7. If the parts you are making are defective or warrant inspection, enter the quantity in the **Non-Conformance** quantity.

   If the 'Non-conformance' quantity belongs to a PCID, use the Non-Conform PCID field to search for and select a PCID.

   If you want to assign the non-conformance parts to a new PCIDs, select the **Generate PCID** button.

Returning Salvage Requests from PCID

If salvaged parts that are in production (WIP) belong to a PCID then you can return them from the PCID to stock using the 'Return Salvage Request Transaction' app. You can then process them within the 'Material Queue' app.

> **i** You must install the 'Advanced Material Management' (AMM) license.

To return salvage parts:

1. Open **Return Salvage Request**.

2. Specify the job from which you wish to return material. After entering the job number, the job's part number and the part number's description display.

3. Select the job assembly and material being moved.

4. Enter the quantity of the return.

5. Select the warehouse and bin from/to which the material is being returned.

6. Select the 'PCID' the returned salvage materials belong to.

7. Select **Save**. 💾

Receiving PCID Parts from Job to Inventory

If parts that are in production (WIP) belong to a PCID then you can receive them from the PCID to stock using the 'Job Receipt to Inventory' app.

When you receive manufactured parts to inventory, the 'Job Receipt to Inventory' app updates the on-hand quantity for the part in the part master file together with the costs. Also, a transaction history record with the job reference is created for the part.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

1. Open **Job Receipt to Inventory**.

2. Select **New** ⊕ to add a new receipt.

3. Search for and select the job number you wish to receive against in the **From Job** field.

4. If the job has more than one assembly, select the assembly you wish to receive against in the **Assembly** field.

> ℹ️ If the job only has one assembly, this field displays a zero (0), and it is unavailable.

5. Define the quantity value.

Quantity

Number of Pieces 0	
Quantity 0	UOM EA
Qty Completed 0	UOM EA
This Transaction 0	UOM EA

6. In the **From Warehouse** group box displays the warehouse and bin where the parts currently are.

From Warehouse

Site
Main

Warehouse
SHP

Bin
SHP-1

Description *
Shipping Bin 1

From PCID

7. Search for and select a PCID.

> **i** For example, assume you completed '50' units that belong to 'PCID 50'. You need to move the '50' units to your inventory. Currently, the '50' units reside in your 'Production Floor' warehouse in 'PCID 50'. Remember, you are moving the amount from 'PCID 50' to your inventory.

8. In the **To Warehouse** group box, define your inventory warehouse and bin.

9. To review the PCID Receipt, select the **PCID Receipt** page.

   The **PCID** card displays.

10. To review the receipt, select the **Receipts** page.

    The **Inventory Receipts** card displays.

Job Receipt	PCID Receipt	Receipts	Costs

11. To review the costs associated with the receipt, select the **Costs** page.

    The **Costs** card displays.

Job Receipt	PCID Receipt	Receipts	Costs

    > ℹ️ If you want to modify the default costs, select the **Override Costs** check box.

12. Select **Save.** 💾

    > ℹ️ The **Done** card now displays the completed transaction. To review the 'Done' card, select the **Job Receipt** page. Next, scroll down to locate and expand the 'Done' card.

Receiving PCID Parts from Job to Job

Using the **Job Receipt to Job** app, you can receive parts that are in WIP to another job rather than inventory.

Assume you complete '10' units of 'Part A' and you need the completed quantity on another job that manufactures 'Part B'. Also, assume that 'Part' A' is tied to PCID #'1'. PCID #'1' is a 'WIP' PCID. When you move the required quantity from one job to another, you can move the quantity to another PCID or you can generate a new one using the 'Generate PCID' button.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

> ℹ️ To learn more about receiving parts from job to job, review the Receiving Manufactured Parts to Another Job article.

1. Open the **Job Receipt to Job** app.

2. From the landing page, select the job you need to receive against.

3. If the job has more than one assembly, select the 'Assembly' you wish to receive against in the **Assembly** field. If the job only has one assembly, this field displays a zero (0), and it is unavailable.

4. Enter the **Quantity** being received to another job.

5. In the **From Warehouse** group box, review the location where the parts currently reside.

This will be most likely the production floor warehouse and bin. If the part belongs to a PCID, then the PCID number would in the 'From PCID' field. This would be a 'WIP' PCID.

6. In the **To Warehouse** group box, review the location where you want the parts to move.

Again, since you are receiving the parts to another job, this would be most likely the a production floor location. If you ware receiving to another PCID, then you need to select the PCID number using the 'To PCID' field. You can also generate a new PCID using the 'Generate To PCID' field and move the items there.

In this example, we are moving '10' units of part 'DCD-100-SP' from the 'Production Floor' warehouse to another production flow location. We are also moving '10' units from PCID '13' to PCID '14'. Therefore, we are moving the quantity from one WIP PCID to another.

7. Define values on the **To Job** card.

8. Select **Save**. 💾

Moving Parts FROM and TO a PCID using Material Request Queue

The **Material Request Queue** app displays a listing of queue material movement requests. The requests are created whenever parts have to be moved from one location to another. Programs such as Receipt Entry, Fulfillment Workbench and the Replenishment Workbench can generate these requests.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

> ℹ️ To learn more about the 'Material Request Queue' app, review the [Working with Material Request Queue](#) article.

1. Open the **Material Request Queue** app.

2. On the **Filters** card, define the date and warehouse related values.

   This will narrow down your transaction search.

3. On the **Unselected** card, select your transaction and next select **Process**.

   This moves the selected material transaction to 'My Selection'.

4. In **My Selections**, select the material transaction and next select **Process**.

    The **WIP/Material Movement Transaction** panel opens.

5. Inside the panel, define the quantity you are moving.

6. Inside the panel, on the **Locations** card, select the **FROM** and **TO** PCID records.

> ℹ️ In this example, PCID '13' is a 'WIP' PCID and the item is currently sitting in production. We are moving '1' piece from production to shipping, but to a different PCID (PCID '14'). PCID '13' still includes more items but we are moving '1' piece out of this PCID.

> ℹ️ If you want the items to be moved to a new PCID then select the 'Generate PCID' button.

7. When you are done, select **OK** to confirm.

    The transaction clear from the 'My Selection' grid.

Requesting to Move WIP PCID

Request a movement transaction for a Work in Process (WIP) PCID. You can then process this request using the 'Material Request Queue' app. Once you create a move WIP request, Kinetic creates the 'WIP-WIP' transaction.

For example, imagine you are producing '200' pieces of the 'Metal Bracket' part. The part belongs to PCID '1'. You are starting the last operation on the job and know you can only fit '100' pieces on a pallet. As a result, you create a WIP PCID request to move the pieces tied to PCID '1' to another location. Next, you process the generated transaction using the 'Material Request Queue' app.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

1. Open the **Move WIP PCID Request** app.

    The **Landing** page displays.

2. In the **PCID** field, enter the PCID you want to move from one location to another and select **Tab**.

   The **Details** card displays.

   You can also search for and select the PCID you need or select it directly from the 'PCIDs' grid. You can only select PCIDs that are in WIP.

3. In the **From** group box review or change the location you are moving the selected PCID from.

4. In the **To** group box select the location you are moving the selected PCID to.

5. Accept the default of **Out**.

6. Expand the **Package Control ID Items** card.

   Notice the 'Item Type' is 'WIP'.

7. Select **Save**.

Moving WIP PCID

Move the **Move WIP PCID** app to move the WIP PCID from one location to another.

For example, assume you have '10' pieces of part 'Metal Rod' in WIP and the part is tied to 'PCID 1'. The parts currently sit in the 'Production Floor' warehouse in the 'Assembly Area' bin, since you issued them to job '4567'. However, you need to move the parts to the 'Machining Area' bin so you use the 'Moving WIP PCID' app where you select 'PCID 1' and move the PCID from the 'Assembly Area' to 'Machining Area' bin.

> ℹ️ You must install the 'Advanced Material Management' (AMM) license.

To move a WIP PCID:

1. Open the **Move WIP PCID** app.

2. On the **Landing** page, in the grid, select the **WIP PCID** you want to move.

   The **Details** card displays.

3. In the **From** and **To** group boxes select the warehouse and bin locations.

4. Expand the **Package Control ID Items** card.

   Notice the **Item Type** holds the WIP type.

5. Select **Save**. 💾

Removing Part WIP Transactions Data

Using the **Database Purge and Summarize** app you can only remove data from the Kinetic database for WIP part transactions.

> ℹ️ For more information on how to purge and summarize data in Kinetic, refer to the Running the Purge and Summarize Process article.

1. Open the **Database Purge and Summarize** app.

2. The **Last Purged** group boxes display information about the previous time the database was purged.

   > ℹ️ Use this information to determine if enough time has passed for you to run the database purge again.

3. In the Cut Off Date field, select the cut off date you want the purge process session to use.

   This value determines the last date from which records are removed from the database. Any selected records entered on or before this date are deleted from the database.

4. If you wan the process to delete part WIP transactions, select the **Part WIP Transactions** check box.

   > ℹ️ To be able to select the check box, you must install the 'Advanced Material Management (AMM)' license.

5. Select **Process**. ⚙️

Shipping WIP PCID Using Customer Shipment Entry

You can ship an entire PCID tied to a part set to 'Make To Order' (MTO) on a sales order release or a finished item marked for your inventory directly from your 'Production Floor'. You can also release the items tied to the PCID for picking using the 'Fulfillment Workbench' app. In this case, Kinetic would generate a 'Material Queue' transaction that you would process to move the finished goods to your 'Shipping Warehouse'. In such a case, the PCID would empty.

> ℹ️ This article will explain both scenarios using a set of workshops.

Assume you have an inventory item set to MTO on your sales order release. Also assume your customer wants '100' pieces. As a result, you create and complete a job and tie the produced units to a PCID, when you end production. The items are earmarked for inventory, but you decide to ship the whole PCID ('100' units) from your 'Production Floor' directly do the customer, bypassing the 'Release for Picking' process using the 'Fulfillment Workbench' app. The same would apply if your item was not set to MTO on your sales order release.

Assume you have an inventory item set to MTO on your sales order release. Also assume your customer wants '100' pieces. As a result, you create and complete a job and tie the produced units to a PCID, when you end production. The items are designated for inventory, but you decide to release them for picking using the 'Fulfillment Workbench' app. Therefore, the items that belong to the PCID move from your 'Production Floor' to 'Shipping' warehouse the moment you process the generated

'Material Queue' transaction. The same would apply if your item was not set to MTO on your sales order release.

> ⚠️ The data entries used in this article are just examples. It is recommend you use your initials for any records you enter. This will make your records unique, in case there are multiple users testing the same article and sharing the same database.

In this article, we will:

- [Set up your site](#)

- [Create a new Control ID](#)

- [Configure Package Control ID](#)

- [Create a manufactured part](#)

- [Enter a sales order](#)

- [Create a job](#)

- [Start and end production](#)

- [Review the Part WIP Transaction History Tracker](#)

- [Review the Part Tracker](#)

- [Review Package Control ID Code](#)

- [Release items for picking](#)

- [Process the Material Request Queue](#)

- [Review Package Control ID Code](#)

- [Review the Part Tracker](#)

- [Unpick sales order](#)

> ⚠️ To be able to review this article, you must install the **Advanced Material Management** license.

Set Up Your Site

First, set up the site you will be working in.

1. Open the **Site Configuration Control** app.

   The **Landing** page displays.

2. Select the site you are working in.

   The **Details** card displays.

   > ℹ️ In this case, we are working in the 'Main' site. Therefore, we click on the 'MfgSys' link. However, this is just an example.

3. In the Nav tree, select the **AMM** node.

A set of cards display.

4. Expand the **Package Control** card.

5. Select the **Enable Package Control** check box.

ⓘ   If the check box is selected by default, skip this step.

6. Finally, select **Save**.

7. Scroll up and expand the **Picking** card.

8. Select the **Unpack to Picked Status** check box and **Save**.

9. Scroll down and expand the **WIP Settings** card.

10. Select the **Track WIP Transactions** and **Consume WIP on Operation Completion** check boxes.

> ℹ️ If the check boxes are selected by default, skip this step.

11. Select **Save**.

12. Exit the Site Configuration Control app.

Create New Control ID

Next, create a new 'Control ID' where you will define segments.

1. Open the **Control ID Maintenance** app.

   The **Landing** page displays.

2. Select **New**.

   The **Details** card displays.

3. Enter the **Control ID Code** and **Description**.

   > In this case, we entered 'Ship From WIP'. However, this is just and example.

4. Select **Save**.

5. In the Nav tree, select the **Segments List** node.

   The **Segments List** card displays.

6. On the **Segments List** card, select **New Segment**.

7. In the Nav tree, select the **Segments List/Segment Details** node.

   The **Segment Details** card displays.

8. Select/enter the following values and **Save**.

> We entered 'Ship WIP' for the segment description and format. However, this is just an example.

9. Next, select **New Segment** again.

10. Select/enter the following values and **Save**.

11. In the Nav tree, select the **Details** node.

   The **Details** card displays.

12. Select the **Active** check box.

13. Select **Save**.

14. Exit the Control ID Maintenance app.

Create New Package Control ID

Now configure your 'Package Control ID'.

1. Open the **Package Control ID Configuration** app.

   The **Landing** page displays.

2. Select **New**.

   The **Details** card displays.

3. Select/enter the following values.

> **i** We entered 'Ship WIP' for the 'Package Control ID Code' and 'Description'. However, this is just an example. We also selected the previously created 'Ship From WIP' Control ID Code.

4. Select **Save**.

5. Scroll down to locate the **Segments** card and expand it.

6. On the card, select the second segment.

Segment ...	Segment Desc	Segment Format	Segment Type	Segment P...	Example
1	ShipWIP	SHIPWIP	Fixed	1	
2	NUM	###	Numeric Sequential	2	

7. Enter the following values in the **Numeric Range From** and **Numeric Range To** column fields.

Numeric Range From	Numeric Range To
0	0
1	999

8. Select **Save**.

9. In the Nav tree, select the **Details** node.

    The **Details** card displays.

10. Select the following check boxes and **Save**.

11. Exit the Package Control ID Configuration app.

Create Part

Next, you will create a new part.

1. Open the **Part** app.

2. Select **New**.

3. Select/enter the following values.

      The 'Part ID' and its 'Description' is just an example.

4. Select **Save**.

5. In the Nav tree, select the **Part** node.

   The **Part** card displays.

6. In the **Sales Unit Price** field, enter **5** and **Save**.

7. In the Nav tree, select the **Revisions/Detail** node.

   The **Revision Detail** card displays.

8. Select **New Part Revision**.

9. Enter the following values and **Save**.

10. Remain in the Part app.

Create Method of Manufacture

In this section, create a simple method of manufacture for the previously entered part.

1. You are on the **Revision Detail** card.

2. Select the **Check Out Revision** button.

   The **Part Revision Checkout** panel opens.

3. In the **ECO Group** field, enter your ECO group and press **Tab**.

> ℹ️ In this case, we selected the 'manager' ECO group.

4. Inside the panel, select **OK**.

5. Next, select the **Engineering Workbench** button.

    The **Engineering Workbench** app opens.

6. Fully expand the Nav tree.

You can see the 'Operations' and Materials' nodes.

7. Right-click the **Operations** node and select **New Operation**.

8. In the Nav tree, select the newly generated operation sequence node.

   Th **Operation** card displays.

9. Select/enter the following values and **Save**.

10. Right-click the **Materials** node and select **New Material**.

11. In the Nav tree, select the newly generated material sequence node.

    Th **Material** card displays.

12. Select/enter the following values and **Save**.

> ⚠ Material '1032x050' is set to 'Backflush' so we will not need to issue it to the job.

13. Select the **Approve and Check In All** button.

    The **Question** panel opens.

14. To the **Are you sure?** message, select **Yes**.

    The **Description of Change** panel opens.

15. Inside the **Description of Change** panel, select **OK**.

    The **Information** panel opens.

16. Inside the **Information** panel, select **OK**.

17. Exit the Engineering Workbench app.

18. Go back to the **Part** app, and select **Refresh**.

You are on the **Revision Detail** card. The revision shows 'Approved'.

19. Select **Save**.

20. Exit the Part app.

Create Sales Order

The next step in the process is to create a new sales order for '100' units of the previously created part.

1. Open the **Order Entry** app.

    The **Landing** page displays.

2. Select **New Order**.

    The **Order Header** card displays.

3. Select/enter the following values.

> ℹ️ In the 'Need By' field, enter today's date.

4. Select **Save**.

5. In the Nav tree, select the **Lines/Detail** node.

    The **Line Detail** card displays.

6. Select **New Line**.

7. Select/enter the following values and **Save**.

> ℹ The 'Unit Price' of '5' dollars will default.

8. In the Nav tree, select the **Releases/Detail** node.

The **Release Detail** card displays.

9. Select the **Make Direct** check box.

10. Select the **Ready To Fulfill** check box and **Save**.

11. In the Nav tree, select the **Sales Order** node.

    The **Order Header** card displays.

12. Select the **Ready To Fulfill** check box and **Save**.

    The **Information** panel opens.

13. Inside the panel, to the message, select **Yes**.

14. Record the sales order number.

15. Remain in the Order Entry app.

Create Job

Since the sales order release is set to 'Make To Order', create a job using the 'Order Job Wizard' app.

1. From the **Overflow** menu, select **Order Job Wizard**.

    The **Order Job Wizard** panel opens.

2. Inside the panel, select the following check boxes.

3. Inside the panel, select the **Create Jobs** button.

4. Record the job number.

> ℹ The job number displays on the 'Job' card. In this case, Kinetic generated job '2429'. However, this is just an example.

5. Record the job number.

6. Close the Order Job Wizard panel.

7. Exit the Order Entry app.

Start and End Production

You job is ready so you can start production. Here you will generate a PCID number.

1. Open the **Data Collection** app.

In this case, we are automatically signed in as 'Charles L Johnson'.

2. Select the **Start Production** button.

   The **Start Production Activity** panel opens.

3. In the **Job** field, enter the previously recorded job number and press **Tab**.

4. In the **Operation** field, select **10**.

5. Inside the **Start Production Activity** panel, select **OK**.

6. Select the **End Activity** button.

   The **End Labor Activity** panel opens.

7. In the **Current** field, enter **100** and press **Tab**.

8. Select the **Generate PCID** button.

   The **Package Control ID Generator** panel opens.

9. Select/enter the following values.

10. Inside the **Package Control ID Generator** panel, clear the **Print Labels** check box.

11. Inside the **Package Control ID Generator** panel, select the **Generate PCID** button.

12. Record the PCID.

    The number displays in the 'PCID' field located in the 'End Labor Activity' panel.

> ℹ️ In this case, Kinetic generated number 'SHIPWIP1'.

13. Inside the **End Labor Activity** panel, select **OK**.

    The **Warning** panel opens.

    > ℹ️ If the 'Warning' panel does not display, skip this step.

14. Inside the **Warning** panel, select **Yes**.

15. Exit the Data Collection app.

Review Part WIP Transaction History Tracker

Given that you previously generated a PCID number, the produced parts are now tied to it.

1. Open the **Part WIP Transaction History Tracker** app.

2. In the **Part** field, enter the previously created part and press **Tab**.

> ⓘ In this case, our part is called 'WIP_Part'. However, this is just an example.

3. Review the **WIP Transaction History** card.

Part	Rev	Tran	Date	Type	Track Type	Quantity	Update Stage Qty	U/M	Site	Job	PCID
WIP_Part		2	8/13/24	WIP-ADD	M	100.00	MFG-CUS	EA	MfgSys	2429	SHIPWIP1

You can see you have '100' units tied to the 'SHIPWIP1' PCID.

4. Exit the Part WIP Transaction History Tracker app.

Review Part Tracker

1. Open the **Part Tracker** app.

2. In the **Part** field, enter the previously created part and press **Tab**.

ℹ️ In this case, our part is called 'WIP_Part'. However, this is just an example.

3. Next, select the **Activity** page.

4. Scroll down to locate and expand the **On Hand - Part Location WIP** card.

ℹ️ You can see you have '100' units tied to the 'SHIPWIP1' PCID and the quantity sits in the 'Production Floor' warehouse.

5. Exit the Part Tracker app.

Review Package Control ID Code

Next, review the PCID Status. The status has changed from 'EMPTY' to 'WIPFG', because you have now '100' pieces in WIP.

1. Open the **Package Control ID Maintenance** app.

   The **Landing** page displays.

2. In the **PCID** field, enter the previously recorded PCID and press **Tab**.

    The **PCID** card displays.

> ℹ️ In this case, we enter PCID 'SHIPWIP1'. However, this is just an example.

3. Review the card.

    Notice the following values:

- The 'PCID Status' field displays 'WIPFG'

- The 'Prior PCID Status' field displays 'EMPTY'.

- The 'Control Type' field displays 'DYNAMIC'.

4. Scroll down to locate and expand the **Items** card.

> ℹ The PCID shows the 'WIP' status and there are '100' units inside this PCID.

5. Exit the Package Control ID Maintenance app.

> ℹ Next, we are going to release the items for picking, but you can ship the order to your customer directly from your 'Production Floor', if required. This would bypass the 'Releasing For Picking' process using the 'Fulfillment Workbench' app. If you decide to ship directly from your 'Production Floor' then you must select the 'PCID' the items belong to in the 'Customer Shipment Entry' app. The 'Customer Shipment' steps below will show you how, but you cannot then release your entire sales order for picking using the 'Fulfillment Workbench' app.

1. Open the **Customer Shipment Entry** app.

2. Select **New Pack**.

   The **Header Details** card displays.

3. In the **Pack** group box, in the **Order Number** field, enter your order number and press **Tab**.

4. In the **Pack** group box, in the **PCID** field, enter your PCID number and press **Tab**.

5. Select **Save**.

6. In the Nav tree, select the **Shipment Lines/Line Detail** node.

   The **Line Detail** card displays.

7. Scroll down to locate the **From Manufacturing** card and review it.

> ⓘ You are shipping the entire PCID.

8. In the Nav tree, select the **Details** node.

The **Header Details** card displays.

9. Select the **Shipped** check box and **Save**.

10. Exit the Customer Shipment Entry app.

> ℹ Once you confirm your shipment, the 'PCID Status' changes from 'PACKED' to 'SHIPPED'.

Release PCID for Picking

Next, release the full quantity for picking.

1. Open the **Fulfillment Workbench** app.

2. Next, select **Search**.

   The **Search** panel opens.

3. In the **Search** panel, locate the **Part Number Start** field, enter your part number and press **Tab**.

4. In the **Search** panel, select the **Search** button.

> ℹ️ The 'Search' button is located at the very bottom of the 'Search' panel.

5. Select the retrieved order.

6. Select **OK** to confirm.

7. Next, select the order again.

8. From the **Overflow** menu, select **Release For Picking**.

   The **Information** panel opens.

9. In the **Information** panel, select **OK**.

   The **Fulfillment Workbench Release For Picking Options** panel opens.

10. In the **Fulfillment Workbench Release For Picking Options** panel, accept the defaults and select **OK**.

    The **Question** panel opens.

11. In the panel, select **No**.

    We do not want to print.

12. Review the **All** card in the **Fulfillment Workbench** app.

    You have '100 units in 'Picking'.

13. Keep the Fulfillment Workbench app opened.

    Next, you will process the generated material transaction, but you will open the 'Material Request Queue' app in a new tab.

Process Material Request Queue

When you process the 'Material Request Queue' transaction, you will move '100' units from the 'Production Floor' warehouse to the 'Shipping Area' warehouse.

1. Open the **Material Request Queue** app.

> ℹ️ Open the app in a new tab. You must right-click 'Material Request Queue' for the options to display.
>
>

2. In the **From Date** field, select today's date.

3. On the **Unselected** card, select the generated transaction.

	Seq	Date	Time	Priority
☑	679	08/15/2024	02:23:22	5

(Unselected / My Selections card, showing Unselected tab selected)

4. Select the **Select** button.

Select   Process   Tags   Assign To   Select and Print   ⋮

5. Next, select **My Selections**.

The **My Selections** card displays.

	Seq	Date	Time	Priority
☐	679	08/15/2024	02:23:22	5

(Unselected / My Selections card, showing My Selections tab selected)

6. Select the **Process** button.

The **WIP/Material Movement Transaction** panel opens.

Deselect   Process   Tags   Print   ⋮

Inside the panel, review the 'Locations' card. You will move '100' units from the 'Production Floor' warehouse to the 'Shipping Area' warehouse.

7. Inside the **WIP/Material Movement Transaction** panel, select **OK**.

8. Exit the Material Request Queue app.

9. Go back to the **Fulfillment Workbench** app and select **Refresh**.

10. Review the **All** card.

> ⓘ The 'Picked' column field now shows '100' pieces.

11. Exit the Fulfillment Workbench app.

Review Package Control ID Code

Next, review the PCID Status. The status has changed from 'WIPFG' to 'SOPICK', because you have released '100' pieces for picking using the 'Fulfillment Workbench' app.

1. Open the **Package Control ID Maintenance** app.

    The **Landing** page displays.

2. In the **PCID** field, enter the previously recorded PCID and press **Tab**.

    The **PCID** card displays.

    > ⓘ   In this case, we enter PCID 'SHIPWIP1'.

3. Review the card.

Notice the following values:

- The 'PCID Status' field displays 'SOPICK'

- The 'Prior PCID Status' field displays 'WIPFG'.

4. Scroll down to locate and expand the **Items** card.

> The PCID shows the 'WIP' status and there are '100' units inside this PCID.

5. Exit the Package Control ID Maintenance app.

Review Part Tracker

Next, review the 'Part Tracker' again. It is assumed you processes the 'Material Request Queue' so now we will verify that '100' units are now in the 'Shipping Area' warehouse.

1. Open the **Part Tracker** app.

2. In the **Part** field, enter the previously created part and press **Tab**.

> ℹ️ In this case, our part is called 'WIP_Part'.

3. Next, select the **Activity** page.

4. Scroll down to locate and expand the **On Hand - Part Location WIP** card.

Site	Warehouse	Bin	PCID	Quantity
Main Plant	Shipping Area	SHP-1	SHIPWIP1	100.00

> ℹ️ You can see that you now have '100' units in the 'Shipping Area' warehouse.

5. Exit the Part Tracker app.

Unpick Sales Order

Finally, unpick the sales order.

> ℹ️ To learn more about this program, review the **Unpicking Sales Orders** article.

1. Open the **Unpick Sales Order** app.

2. In the PCID field, enter the previously recorded PCID and press **Tab**.

3. In the **Part** field, enter the previously created part and press **Tab**.

4. Select **Save**.

   The **Questions** panel opens.

> ⦿ **Question**
>
> This will unpick all of part WIP_PART5 contained within the PCID. Continue?

5. In the panel, select **Yes**.

6. Exit the Unpick Sales Order app.

> ℹ️ When you unpick your sales order, then:
>
> a. The 'Package Control ID' status will show 'WIPFG' instead of 'SOPICKED'. Review the 'Package Control ID Maintenance' app.
>
> b. The 'Fulfillment Workbench' will show '0' units in the 'Picked' and 'Picking' fields. Review the 'Fulfillment Workbench' app.

Shipping WIP PCID Using Pack Out Entry

You can ship an entire PCID tied to a part set to 'Make To Order' (MTO) on a sales order release or a finished item marked for your inventory directly from your 'Production Floor'. You can also release the items tied to the PCID for picking using the 'Fulfillment Workbench' app. In this case, Kinetic would generate a 'Material Queue' transaction that you would process to move the finished goods to your 'Shipping Warehouse'. In such a case, the PCID would empty.

> ℹ️ This article will explain both scenarios using a set of workshops.

Assume you have an inventory item set to MTO on your sales order release. Also assume your customer wants '100' pieces. As a result, you create and complete a job and tie the produced units to a PCID, when you end production. The items are earmarked for inventory, but you decide to ship the whole PCID ('100' units) from your 'Production Floor' directly do the customer, bypassing the 'Release for Picking' process using the 'Fulfillment Workbench' app. The same would apply if your item was not set to MTO on your sales order release.

Assume you have an inventory item set to MTO on your sales order release. Also assume your customer wants '100' pieces. As a result, you create and complete a job and tie the produced units to a PCID, when you end production. The items are designated for inventory, but you decide to release them for picking using the 'Fulfillment Workbench' app. Therefore, the items that belong to the PCID move from your 'Production Floor' to 'Shipping' warehouse the moment you process the generated

'Material Queue' transaction. The same would apply if your item was not set to MTO on your sales order release.

> ⚠ The data entries used in this article are just examples. It is recommend you use your initials for any records you enter. This will make your records unique, in case there are multiple users testing the same article and sharing the same database.

In this article, we will:

- Set up your site

- Create a new Control ID

- Configure Package Control ID

- Create a manufactured part

- Enter a sales order

- Create a job

- Start and end production

- Review the Part WIP Transaction History Tracker

- Review the Part Tracker

- Review Package Control ID Code

- Release PCID Items for Picking

- Process the Material Request Queue

- Review Package Control ID Code

- Review the Part Tracker

- Create Pack and Ship

> ⚠ To be able to review this article, you must install the **Advanced Material Management** license.

Set Up Your Site

First, set up the site you will be working in.

1. Open the **Site Configuration Control** app.

   The **Landing** page displays.

2. Select the site you are working in.

   The **Details** card displays.

   > ℹ️ In this case, we are working in the 'Main' site. Therefore, we click on the 'MfgSys' link. However, this is just an example.

3. In the Nav tree, select the **AMM** node.

A set of cards display.

4. Expand the **Package Control** card.

5. Select the **Enable Package Control** check box.

> ⓘ If the check box is selected by default, skip this step.

6. Finally, select **Save**.

7. Scroll up and expand the **Picking** card.

8. Select the **Unpack to Picked Status** check box and **Save**.

9. Scroll down and expand the **WIP Settings** card.

10. Select the **Track WIP Transactions** and **Consume WIP on Operation Completion** check boxes.

> (i) If the check boxes are selected by default, skip this step.

11. Select **Save**.

12. Exit the Site Configuration Control app.

Create New Control ID

Next, create a new 'Control ID' where you will define segments.

1. Open the **Control ID Maintenance** app.

   The **Landing** page displays.

2. Select **New**.

   The **Details** card displays.

3. Enter the **Control ID Code** and **Description**.

   > In this case, we entered 'Ship From WIP'. However, this is just and example.

4. Select **Save**.

5. In the Nav tree, select the **Segments List** node.

   The **Segments List** card displays.

6. On the **Segments List** card, select **New Segment**.

7. In the Nav tree, select the **Segments List/Segment Details** node.

   The **Segment Details** card displays.

8. Select/enter the following values and **Save**.

> ⓘ We entered 'Ship WIP' for the segment description and format. However, this is just an example.

9. Next, select **New Segment** again.

10. Select/enter the following values and **Save**.

11. In the Nav tree, select the **Details** node.

    The **Details** card displays.

12. Select the **Active** check box.

13. Select **Save**.

14. Exit the Control ID Maintenance app.

Create New Package Control ID

Now configure your 'Package Control ID'.

1. Open the **Package Control ID Configuration** app.

   The **Landing** page displays.

2. Select **New**.

   The **Details** card displays.

3. Select/enter the following values.

> We entered 'Ship WIP' for the 'Package Control ID Code' and 'Description'. However, this is just an example. We also selected the previously created 'Ship From WIP' Control ID Code.

4. Select **Save**.

5. Scroll down to locate the **Segments** card and expand it.

6. On the card, select the second segment.

Segment ...	Segment Desc	Segment Format	Segment Type	Segment P...	Example
1	ShipWIP	SHIPWIP	Fixed	1	
2	NUM	###	Numeric Sequential	2	

7. Enter the following values in the **Numeric Range From** and **Numeric Range To** column fields.

Numeric Range From	Numeric Range To
0	0
1	999

8. Select **Save**.

9. In the Nav tree, select the **Details** node.

    The **Details** card displays.

10. Select the following check boxes and **Save**.

11. Exit the Package Control ID Configuration app.

Create Part

Next, you will create a new part.

1. Open the **Part** app.

2. Select **New**.

3. Select/enter the following values.

> i   The 'Part ID' and its 'Description' is just an example.

4. Select **Save**.

5. In the Nav tree, select the **Part** node.

   The **Part** card displays.

6. In the **Sales Unit Price** field, enter **5** and **Save**.

7. In the Nav tree, select the **Revisions/Detail** node.

   The **Revision Detail** card displays.

8. Select **New Part Revision**.

9. Enter the following values and **Save**.

10. Remain in the Part app.

Create Method of Manufacture

In this section, create a simple method of manufacture for the previously entered part.

1. You are on the **Revision Detail** card.

2. Select the **Check Out Revision** button.

   The **Part Revision Checkout** panel opens.

3. In the **ECO Group** field, enter your ECO group and press **Tab**.

> ℹ️ In this case, we selected the 'manager' ECO group.

4. Inside the panel, select **OK**.

5. Next, select the **Engineering Workbench** button.

    The **Engineering Workbench** app opens.

6. Fully expand the Nav tree.

You can see the 'Operations' and Materials' nodes.

7. Right-click the **Operations** node and select **New Operation**.

8. In the Nav tree, select the newly generated operation sequence node.

   Th **Operation** card displays.

9. Select/enter the following values and **Save**.

10. Right-click the **Materials** node and select **New Material**.

11. In the Nav tree, select the newly generated material sequence node.

    Th **Material** card displays.

12. Select/enter the following values and **Save**.

⚠️ Material '1032x050' is set to 'Backflush' so we will not need to issue it to the job.

13. Select the **Approve and Check In All** button.

    The **Question** panel opens.

14. To the **Are you sure?** message, select **Yes**.

    The **Description of Change** panel opens.

15. Inside the **Description of Change** panel, select **OK**.

    The **Information** panel opens.

16. Inside the **Information** panel, select **OK**.

17. Exit the Engineering Workbench app.

18. Go back to the **Part** app, and select **Refresh**.

You are on the **Revision Detail** card. The revision shows 'Approved'.

19. Select **Save**.

20. Exit the Part app.

Create Sales Order

The next step in the process is to create a new sales order for '100' units of the previously created part.

1. Open the **Order Entry** app.

   The **Landing** page displays.

2. Select **New Order**.

   The **Order Header** card displays.

3. Select/enter the following values.

> **i**   In the 'Need By' field, enter today's date.

4. Select **Save**.

5. In the Nav tree, select the **Lines/Detail** node.

   The **Line Detail** card displays.

6. Select **New Line**.

7. Select/enter the following values and **Save**.

> ℹ The 'Unit Price' of '5' dollars will default.

8. In the Nav tree, select the **Releases/Detail** node.

The **Release Detail** card displays.

9. Select the **Make Direct** check box.

10. Select the **Ready To Fulfill** check box and **Save**.

11. In the Nav tree, select the **Sales Order** node.

    The **Order Header** card displays.

12. Select the **Ready To Fulfill** check box and **Save**.

    The **Information** panel opens.

13. Inside the panel, to the message, select **Yes**.

14. Record the sales order number.

15. Remain in the Order Entry app.

Create Job

Since the sales order release is set to 'Make To Order', create a job using the 'Order Job Wizard' app.

1. From the **Overflow** menu, select **Order Job Wizard**.

    The **Order Job Wizard** panel opens.

2. Inside the panel, select the following check boxes.

3. Inside the panel, select the **Create Jobs** button.

4. Record the job number.

> ℹ The job number displays on the 'Job' card. In this case, Kinetic generated job '2429'. However, this is just an example.

5. Record the job number.

6. Close the Order Job Wizard panel.

7. Exit the Order Entry app.

Start and End Production

You job is ready so you can start production. Here you will generate a PCID number.

1. Open the **Data Collection** app.

In this case, we are automatically signed in as 'Charles L Johnson'.

2. Select the **Start Production** button.

   The **Start Production Activity** panel opens.

3. In the **Job** field, enter the previously recorded job number and press **Tab**.

4. In the **Operation** field, select **10**.

5. Inside the **Start Production Activity** panel, select **OK**.

6. Select the **End Activity** button.

   The **End Labor Activity** panel opens.

7. In the **Current** field, enter **100** and press **Tab**.

8. Select the **Generate PCID** button.

   The **Package Control ID Generator** panel opens.

9. Select/enter the following values.

10. Inside the **Package Control ID Generator** panel, clear the **Print Labels** check box.

11. Inside the **Package Control ID Generator** panel, select the **Generate PCID** button.

12. Record the PCID.

    The number displays in the 'PCID' field located in the 'End Labor Activity' panel.

> **i** In this case, Kinetic generated number 'SHIPWIP1'.

13. Inside the **End Labor Activity** panel, select **OK**.

    The **Warning** panel opens.

    > **i** If the 'Warning' panel does not display, skip this step.

14. Inside the **Warning** panel, select **Yes**.

15. Exit the Data Collection app.

Review Part WIP Transaction History Tracker

Given that you previously generated a PCID number, the produced parts are now tied to it.

1. Open the **Part WIP Transaction History Tracker** app.

2. In the **Part** field, enter the previously created part and press **Tab**.

> ℹ️ In this case, our part is called 'WIP_Part'. However, this is just an example.

3. Review the **WIP Transaction History** card.

You can see you have '100' units tied to the 'SHIPWIP1' PCID.

4. Exit the Part WIP Transaction History Tracker app.

Review Part Tracker

1. Open the **Part Tracker** app.

2. In the **Part** field, enter the previously created part and press **Tab**.

> ⓘ In this case, our part is called 'WIP_Part'. However, this is just an example.

3. Next, select the **Activity** page.

4. Scroll down to locate and expand the **On Hand - Part Location WIP** card.

> ⓘ You can see you have '100' units tied to the 'SHIPWIP1' PCID and the quantity sits in the 'Production Floor' warehouse.

5. Exit the Part Tracker app.

Review Package Control ID Code

Next, review the PCID Status. The status has changed from 'EMPTY' to 'WIPFG', because you have now '100' pieces in WIP.

1. Open the **Package Control ID Maintenance** app.

   The **Landing** page displays.

2. In the **PCID** field, enter the previously recorded PCID and press **Tab**.

   The **PCID** card displays.

   > ⓘ In this case, we enter PCID 'SHIPWIP1'. However, this is just an example.

3. Review the card.

   Notice the following values:

- The 'PCID Status' field displays 'WIPFG'

- The 'Prior PCID Status' field displays 'EMPTY'.

- The 'Control Type' field displays 'DYNAMIC'.

4. Scroll down to locate and expand the **Items** card.

> ℹ️ The PCID shows the 'WIP' status and there are '100' units inside this PCID.

Exit the Package Control ID Maintenance app.

> ℹ️ Next, we are going to release the items for picking, but you can ship the order to your customer directly from your 'Production Floor', if required. This would bypass the 'Releasing For Picking' process using the 'Fulfillment Workbench' app. If you decide to ship directly from your 'Production Floor' using the 'Pack Out Entry' app then you must select the 'PCID' the items belong to. The 'Pack Out Shipment' steps below will show you how, but you cannot then release your entire sales order for picking using the 'Fulfillment Workbench' app.

1. Open the **Pack Out Entry** app.

2. Select **New Pack**.

3. In the **PCID** field, enter the previously recorded PCID and press **Tab**.

4. Select **Save**.

5. Select the **Shipped** check box and **Save**. 🖫

> **Status**
> SHIPPED
>
> ☑ Shipped
>
> ☐ Use Auto Qty
>
> **Weight**
> 0.00000
>
> **UOM**
> g

6. Exit the Pack Out Entry app.

> ℹ️ When you ship the 'PCID', the 'PCID' status shows the 'SHIPPED' status in the 'Package Control ID Maintenance' app.
>
> > **PCID**
> > SHIPWIP1 🔍
> >
> > **PCID Status**
> > SHIPPED
> >
> > **Prior PCID Status**
> > PACKED
> >
> > **Control Type**
> > DYNAMIC
> >
> > **Site**
> > Main AUOM Plant
> >
> > **Warehouse**
> > Shipping Area
> >
> > **Return To Warehouse**
>
> Notice the 'Prior PCID Status' shows 'PACKED'. This status displays because when you created your pack using the 'Pack Out Entry' app, you selected 'New

> ℹ️ Pack first, and then you entered the 'PCID' and 'Saved'. This created the 'PACKED' status on your 'PCID'. However, you continued and confirmed the shipment by selecting the 'Shipped' check box. As a result, the 'PCID' status changed from 'PACKED' to 'SHIPPED'.

Release PCID for Picking

Next, release the full quantity for picking.

1. Open the **Fulfillment Workbench** app.

2. Next, select **Search**.

   The **Search** panel opens.

3. In the **Search** panel, locate the **Part Number Start** field, enter your part number and press **Tab**.

4. In the **Search** panel, select the **Search** button.

> ℹ️ The 'Search' button is located at the very bottom of the 'Search' panel.

5. Select the retrieved order.

6. Select **OK** to confirm.

7. Next, select the order again.

8. From the **Overflow** menu, select **Release For Picking**.

    The **Information** panel opens.

9. In the **Information** panel, select **OK**.

    The **Fulfillment Workbench Release For Picking Options** panel opens.

10. In the **Fulfillment Workbench Release For Picking Options** panel, accept the defaults and select **OK**.

    The **Question** panel opens.

11. In the panel, select **No**.

> ℹ️ We do not want to print.

12. Review the **All** card in the **Fulfillment Workbench** app.

> ℹ️ You have '100 units in 'Picking'.

13. Keep the Fulfillment Workbench app opened.

> ℹ️ Next, you will process the generated material transaction, but you will open the 'Material Request Queue' app in a new tab.

Process Material Request Queue

When you process the 'Material Request Queue' transaction, you will move '100' units from the 'Production Floor' warehouse to the 'Shipping Area' warehouse.

1. Open the **Material Request Queue** app.

   > ℹ️ Open the app in a new tab. You must right-click 'Material Request Queue' for the options to display.

2. In the **From Date** field, select today's date.

3. On the **Unselected** card, select the generated transaction.

4. Select the **Select** button.

5. Next, select **My Selections**.

   The **My Selections** card displays.

6. Select the **Process** button.

   The **WIP/Material Movement Transaction** panel opens.

Inside the panel, review the 'Locations' card. You will move '100' units from the 'Production Floor' warehouse to the 'Shipping Area' warehouse.

7. Inside the **WIP/Material Movement Transaction** panel, select **OK**.

8. Exit the Material Request Queue app.

9. Go back to the **Fulfillment Workbench** app and select **Refresh**.

10. Review the **All** card.

> ℹ The 'Picked' column field now shows '100' pieces.

11. Exit the Fulfillment Workbench app.

Review Package Control ID Code

Next, review the PCID Status. The status has changed from 'WIPFG' to 'SOPICK', because you have released '100' pieces for picking using the 'Fulfillment Workbench' app.

1. Open the **Package Control ID Maintenance** app.

   The **Landing** page displays.

2. In the **PCID** field, enter the previously recorded PCID and press **Tab**.

   The **PCID** card displays.

   > ⓘ   In this case, we enter PCID 'SHIPWIP1'.

3. Review the card.

Notice the following values:

- The 'PCID Status' field displays 'SOPICK'

- The 'Prior PCID Status' field displays 'WIPFG'.

4. Scroll down to locate and expand the **Items** card.

> ℹ The PCID shows the 'WIP' status and there are '100' units inside this PCID.

5. Exit the Package Control ID Maintenance app.

Review Part Tracker

Next, review the 'Part Tracker' again. It is assumed you processes the 'Material Request Queue' so now we will verify that '100' units are now in the 'Shipping Area' warehouse.

1. Open the **Part Tracker** app.

2. In the **Part** field, enter the previously created part and press **Tab**.

> ℹ️ In this case, our part is called 'WIP_Part'.

3. Next, select the **Activity** page.

4. Scroll down to locate and expand the **On Hand - Part Location WIP** card.

> ℹ️ You can see that you now have '100' units in the 'Shipping Area' warehouse.

5. Exit the Part Tracker app.

Create a Pack

Finally, create a pack to ship the PCID. We will use the 'Pack Out Entry' app.

1. Open the **Pack Out Entry** app.

2. Select **New Pack**.

3. In the **PCID** field, enter the previously recorded PCID and press **Tab**.

4. Select **Save**.

> ℹ️ Keep the 'Pack Out Entry' app opened.

5. Next, open the **Package Control ID Maintenance** app in a new tab and retrieve you PCID.

6. Review the **PCID** card.

PCID
SHIPWIP1 🔍

PCID Status
PACKED

Prior PCID Status
SOPICK

Control Type
DYNAMIC

Site
Main AUOM Plant ▾

Warehouse
Shipping Area ▾

Return To Warehouse ▾

> ℹ️ The 'PCID Status' shows 'PACKED'. The 'Prior PCID Status' shows 'SOPICKED'.

> ℹ️ Keep the 'Package Control ID Maintenance' app opened.

7. Go back to the **Pack Out Entry** app.

8. Select the **Shipped** check box and **Save**. 💾

> ℹ️ Keep the 'Pack Out Entry' app opened.

9. Go back to the **Package Control ID Maintenance** app.

10. Select **Refresh**.

11. Review the **PCID** card.

> ℹ The 'PCID Status' shows 'SHIPPED'. The 'Prior PCID Status' shows 'PACKED'.

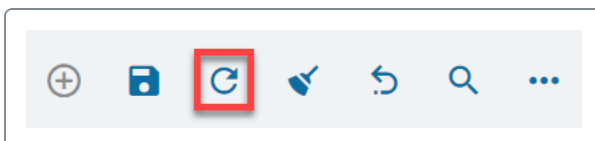> ℹ Keep the 'Package Control ID Maintenance' app opened.

12. Next, go back to the **Pack Out Entry** app and clear the **Shipped** check box.

> ℹ Do not forget to select **Save**.

> ℹ Keep the 'Pack Out Entry' app opened.

13. Go back to the **Package Control ID Maintenance** app.

14. Select **Refresh**.

15. Review the **PCID** card.

> ℹ️ The 'PCID Status' shows 'PACKED'. The 'Prior PCID Status' shows 'SHIPPED'.

16. You can now exit the Package Control ID Maintenance app.

17. Go back to the **Pack Out Entry** app.

18. From the **Overflow** menu, select **Open**.

The 'Status' field now shows the 'OPEN' status.

Status
OPEN

19. Exit the Pack Out Entry app.