TRADEPEG

Bins & Batches

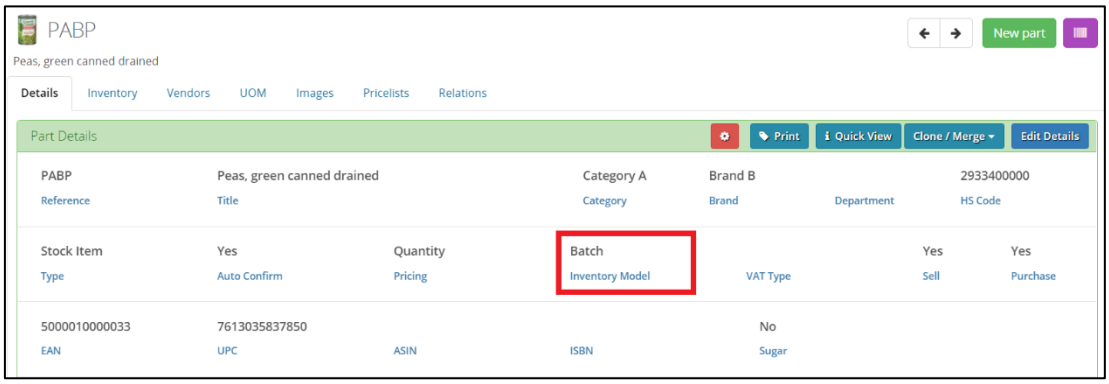
Contents

Inventory Models 2
Static Binning 4
Multi-Binned Items (Advanced) 5
Batched Items 6
Receiving Multi-Bin and Batched SKU's (RCT) 8
Packing Multi-Bin and Batched SKU's 9
Transferring Bins and Batches (TRC/TRN) 10
Bin Management 11
Bins: 11
Bin Zones: 12

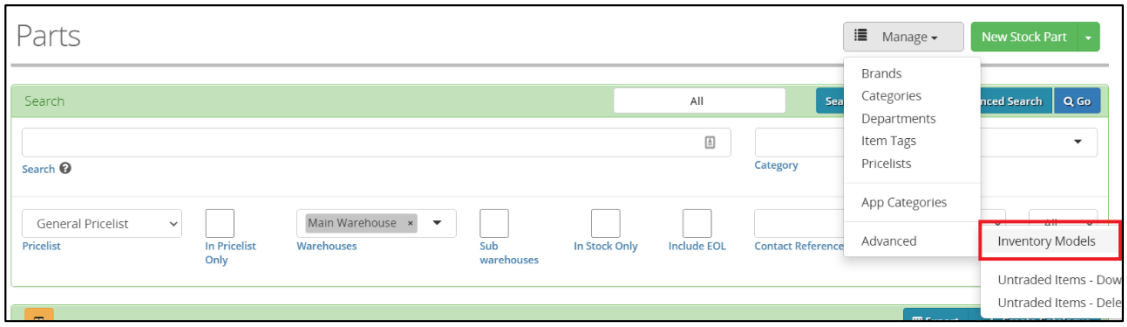
Inventory Models

Inventory Models define how inventory is managed in the warehouse and on the Tradepeg system. Inventory Models are applied to each SKU individually. Using inventory models, we can set an SKU as multi-binned, batched, or make it require quality control.

Inventory models are applied per SKU on the Product page:



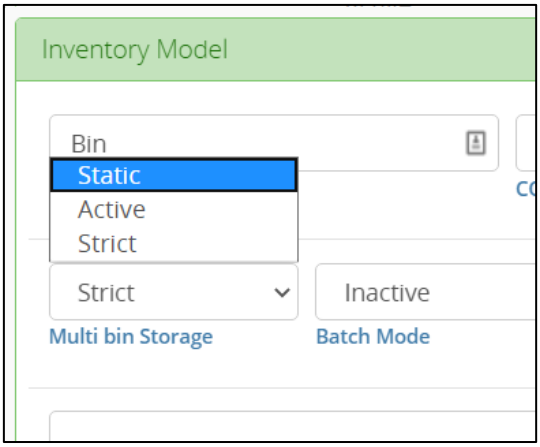
The Inventory Models are created and managed by going to Manage > Advanced > Inventory Models (IM) on the Parts page.



Clicking the name of an existing model or pressing “New Model” brings up the IM settings.

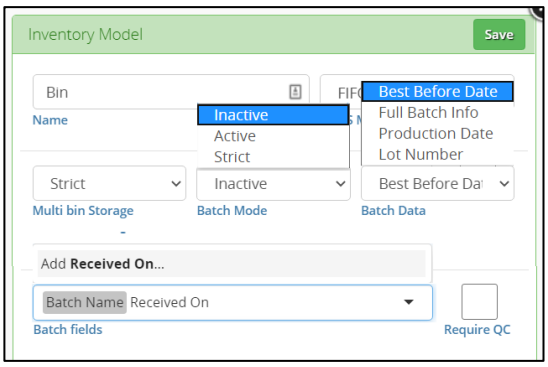
Multi Bin Storage sets how Bins are used with this IM:

- *Static* means that bins will be set per SKU per warehouse, not on an individual item level
- *Active* (advanced) means multi bin storage is available, but does not need to be used
- *Strict* (advanced) means that every individual item must have a BIN location specified



Batch Mode sets how batches are used with this IM:

- *Inactive* means that batches will not be used
- *Active* means batch information can optionally be entered
- *Strict* means that products must have Batch information entered



Batch Data sets which data is used to identify a Batch. If 'Full Batch Info' is used, at least one of the three core fields (Best Before Date, Production Date, Lot Number) must be entered when creating a Batch.

Batch fields are used to define any extra information that may be necessary to help identify a Batch. These fields will not be required to be filled in.

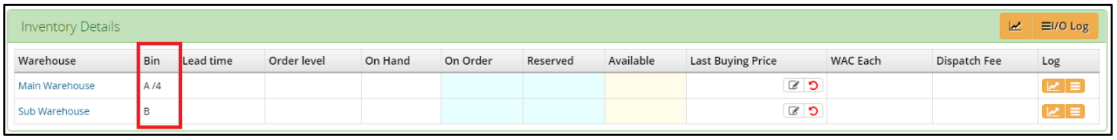
Require QC is used to ensure that Batches received are Quality Controlled. Once items are received, they will be in the system but will be marked as Reserved until they have QC.

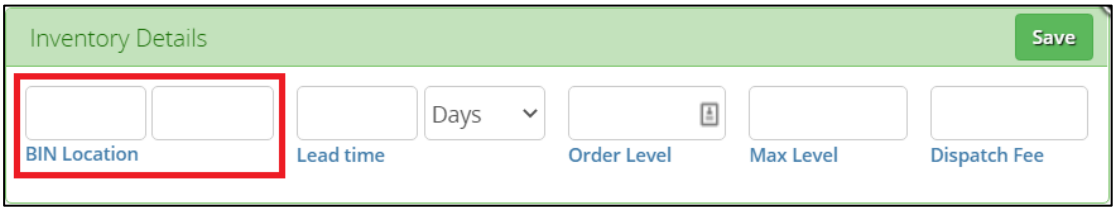
Static Binning

Products are set to statically binned by setting the SKU to use an Inventory Model where Multi Bin Storage is set to Static.

When a product is statically binned the bin is only entered once, on the product details page. Whenever the system is dealing with that product it will know that the product is stored in that bin. For example, when making an RCT or Sales Order, a bin does not need to be specified as the system looks at where the product is stored under product details.

Products that are statically binned have their bin set on the product details page, under Inventory:

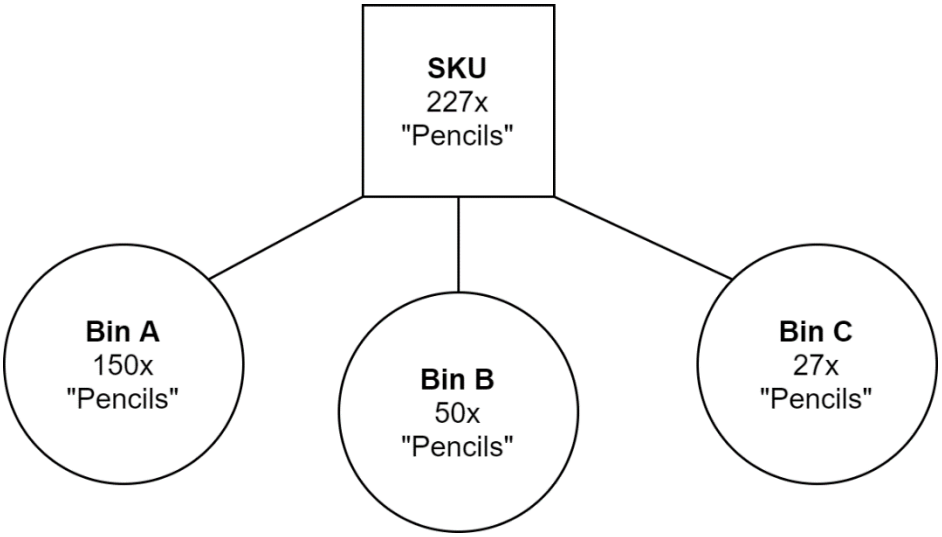




Multi-Binned Items (Advanced)

Products can be setup to use multiple bins by setting the SKU to use an Inventory Model where Multi Bin Storage is set to Active or Strict.

As the name suggests, Multi-Binning means a single SKU can be stored in multiple bins. For example, you can store the same item, 'Pencils' in three bins: A, B and C, with 150 pieces in A, 50 pieces in B and 27 pieces in C.



To some degree, though, items in different bins, even of the same SKU, are considered to be separate. For example, to transfer items from one bin to another requires a Warehouse Transaction (a TRC of type Bin to Bin); we cannot simply change the quantities. Please also note that the stock count of a bin cannot go negative.

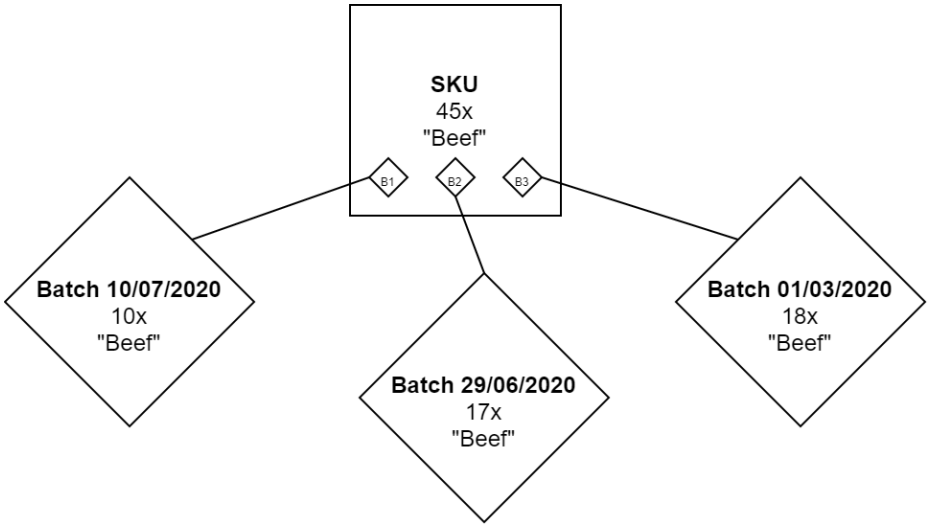
TIP:

When SKU's are binned it can be useful to do Stock Takes by the bin (known as a Bin Count), instead of by SKU (Stock Count). For example, if the SKU 'Pencils' has pieces in bin A and in bin F, we may just want to count the bin in front of us in bin A. This allows us to compartmentalise the Stock Take.

Additionally, when bins are used, Item Queries will show which bin locations the item is stored in, and Bin Queries will show what is in a scanned bin.

Batched Items

Products can be setup to use Batches on an individual SKU level by setting them to use an Inventory Model where Batch Mode is set to Active or Strict. You may choose to have multiple IM's that are used for batches, for example because some products have batches based on a best before date, whilst others use a lot number.

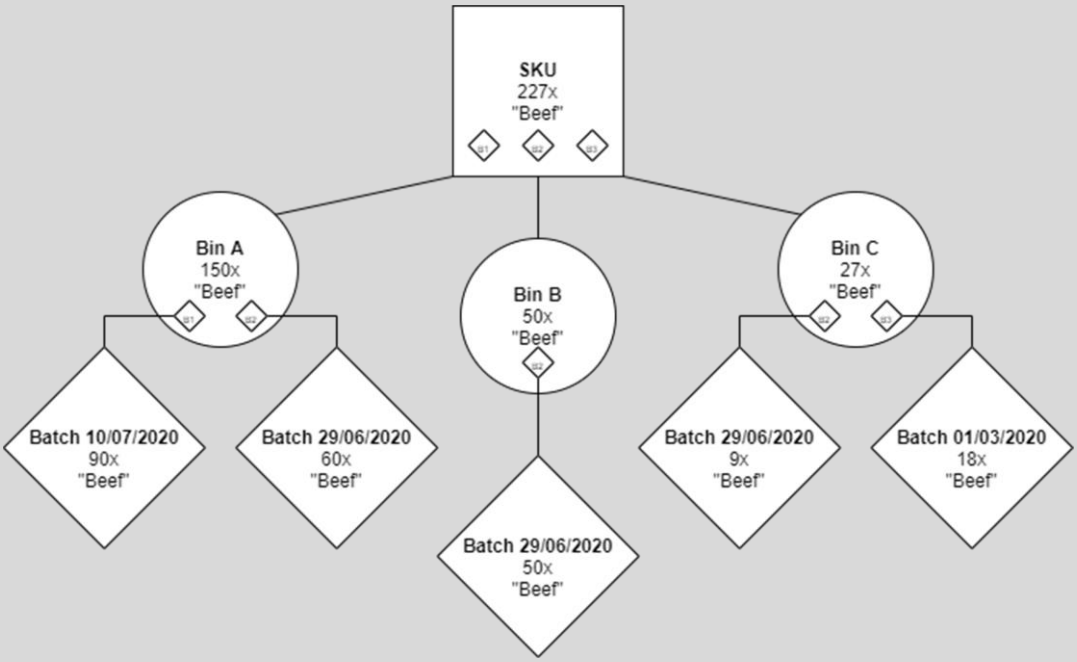


Although a single item can contain multiple batches, it is important to understand that, in some ways, batched items are treated by the system as independent SKU's.

For example, when moving items between batches, (eg some items were mistakenly entered into the system as the wrong batch, and we now want to correct that) we cannot transfer the stock directly. We need two Warehouse Transactions (TRC's); one Adjustment TRC to reduce the stock in the wrong batch, and the second Adjustment to increase the stock in the correct batch.

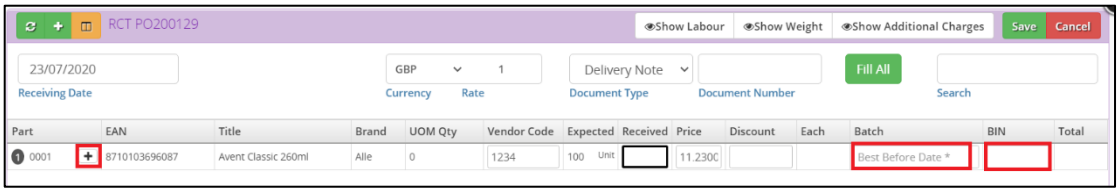
TIP:

Batches can be used in conjunction with bins to create complex inventory management systems. For example, the below diagram shows how 3 batches of “Beef” are spread out over 3 bins, with batches found in multiple bins.

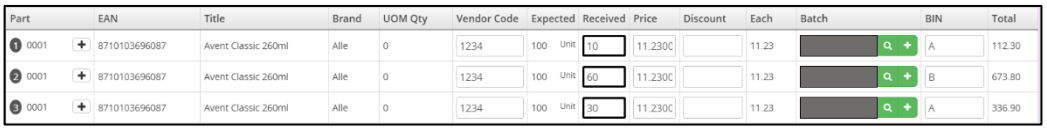


Receiving Multi-Bin and Batched SKU's (RCT)

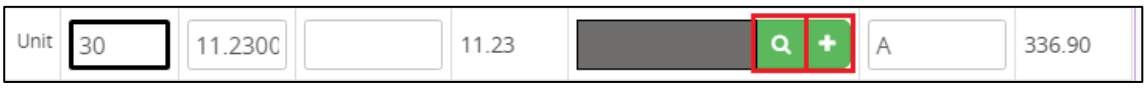
When receiving an order (RCT) for multi-bin or batched items (as defined by the SKU IM), bin and batch information can be entered. If the bin/batch mode is Strict, then bin or Batch Information *must* be entered.

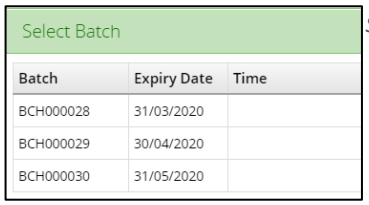


By pressing the '+' button to the left, we can add rows to the RCT so that we can specify multiple bins/batches in one order.

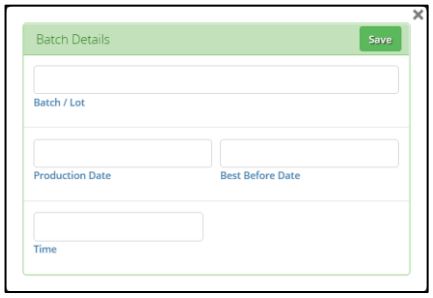


If a date is not used as the Batch Information (eg Lot Number or Full Batch Info is used), then you can search for existing batches to use for the incoming items, or you can add a new Batch using the highlighted buttons.





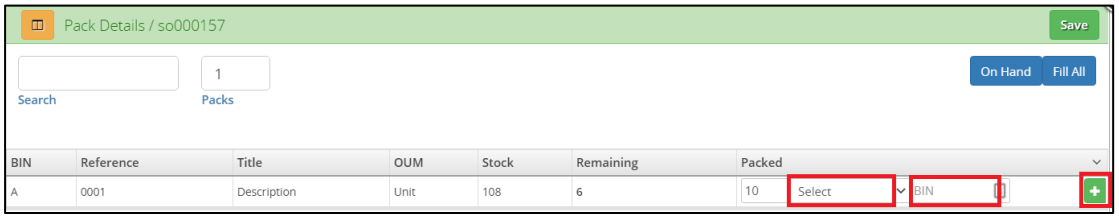
Searching for existing Batches



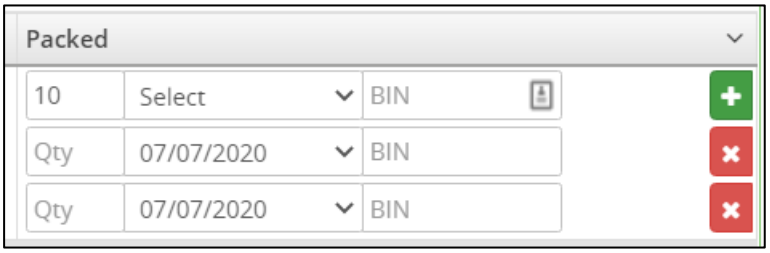
Adding a new Batch

Packing Multi-Bin and Batched SKU's

When packing a Sales Order (SO) for multi-bin or batched items (as defined by the SKU IM), bin and batch information can be entered. If the bin/batch mode is Strict, then bin or Batch Information *must* be entered.



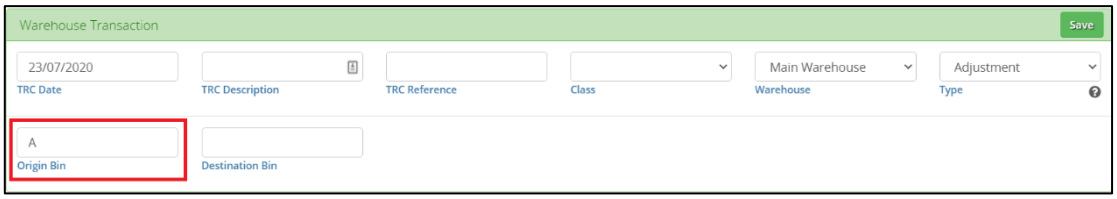
Clicking the '+' button on the right allows us to specify multiple batches to fulfil this order.

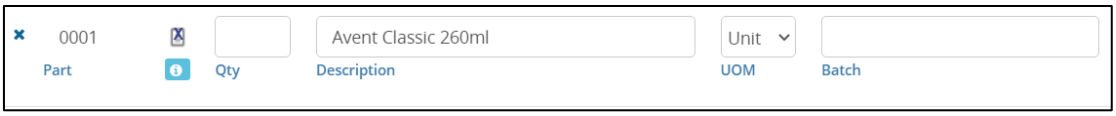


Transferring Bins and Batches (TRC/TRN)

When doing a Warehouse Transfer (TRN), or Transaction (TRC) for multi-bin or batched items (as defined by the SKU IM), bin and batch information can be entered. If the bin/batch mode is Strict, then bin or Batch Information *must* be entered.

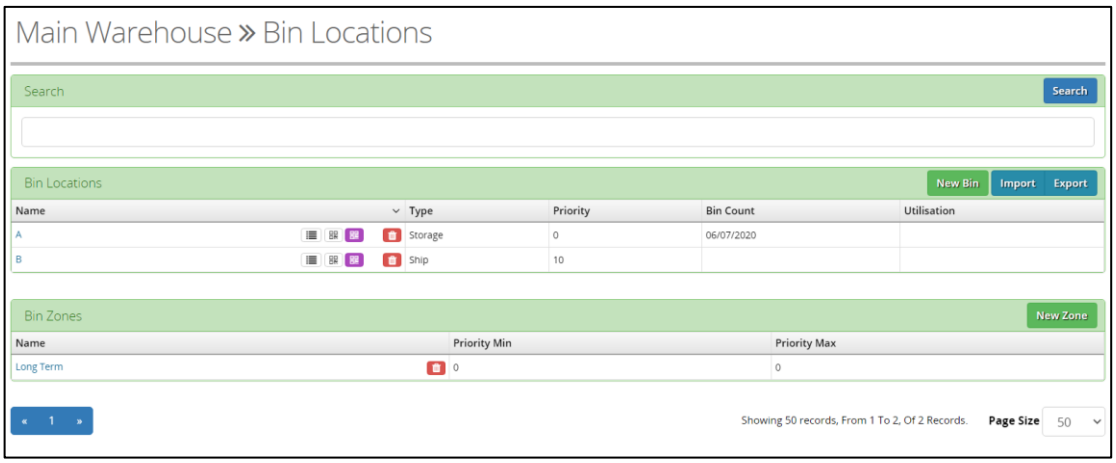
For a TRC the bin is specified when beginning the Transaction, and the batch is added later when adding the part.





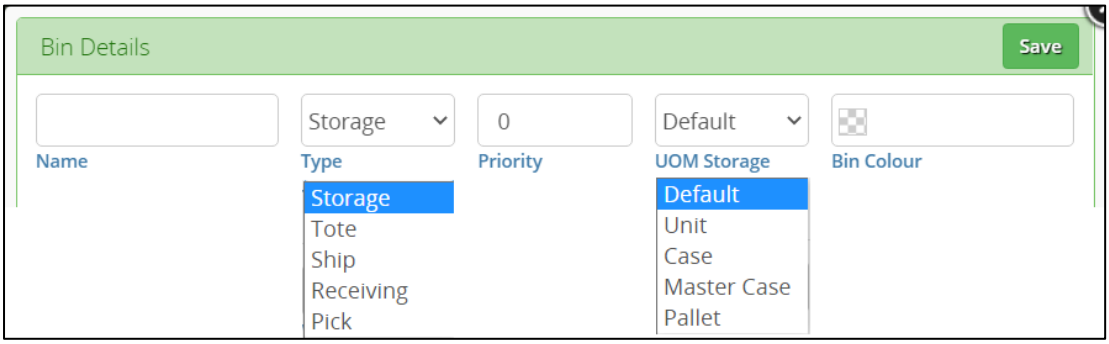
Bin Management

To create and manage bins go to Warehouses (on Dashboard) > Bin Locations



On the bin locations page, we can manage the bins that exist, add new bins and manage bin zones.

Bins:



Type defines the type of the bin. There are 5 options:

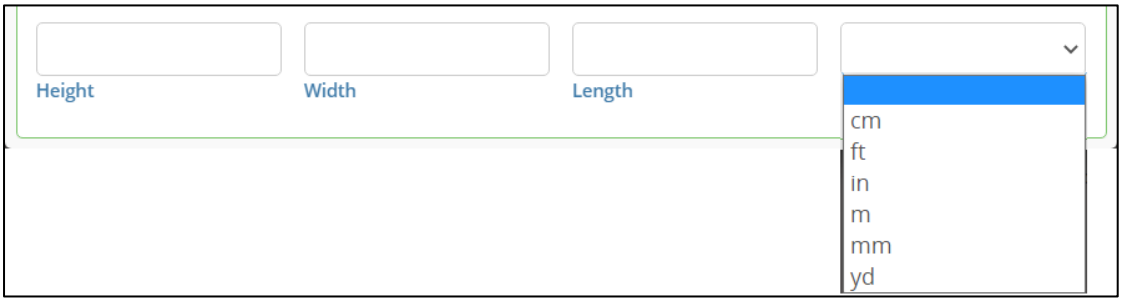
- Storage – …
- Tote – used by picker to transfer items from Picking to fulfilment. Also allows the WMS app to scan the bin to quickly see the stage it is up to in the picking process (Pick/Pack/Ship)
- Ship – shipping area (used to dispatch pallets; used for FBA or Warehouse Transfers (TRN)). Once in the Ship bin, the stock will be marked unavailable.
- Receiving area – where items are received

- Picking bin – these are the bins that items will be picked from to fulfil orders

Priority – this number defines how soon the bin will be picked. The lower the number the sooner it will be picked. However, if more stock is required than is available in the high priority bin, and a lower priority bin has the full amount, the lower priority bin will be used.

UOM storage – the default unit of measure (UOM) for this bin

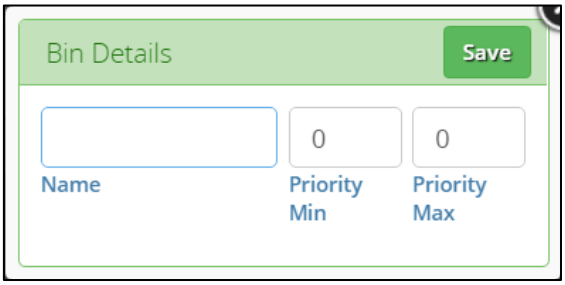
Bin Colour – this colour is used to make picking a little easier, as an extra detail to find the bin. The WMS app will show what colour the bin is of the product being picked.



Bin dimensions are used to calculate utilisation by taking item dimensions of items that the bin contains to find out how full the bin is. In future this utilisation will be used to show a heatmap to show, at-a-glance, where the free space is in the warehouse.

Bin Zones:

Bin zones can be used to subdivide Storage type bins by providing custom classes eg Long storage.



Priority – this number defines how soon the bin zone will be picked. The lower the number the sooner it will be picked. However, if more stock is required than is

available in the high priority bin zone, and a lower priority bin zone has the full amount, the lower priority bin zone will be used.

Priority defines the bins that are part of the zone. Any bins that have a priority that fall in the range of zone priorities are considered part of that zone. For example, Bin A has priority 1, Bin B has priority 11. If the Zone has a priority range 0-10 then it will include Bin A, but not Bin B.