



Picking Slips Location Delivery Methods

Setup and Usage

Knowledge Base Article

<< PICKING SLIP >>

New Company	BATCH CODE	ORDER NO	ORDER DATE	PAGE
UNITED STATES	#####	00000020	11/4/2011	1
		CUSTOMER PO NO 5455		

S AnnDat	S Put014
H Asynchronous Networking Tech.	O Poly Corp
I Frank Mitchell	L Accounts Payable
P 550 Parker Street	D 500 International Tower
T Deerwood, MN 55444	T Suite 207
O	O St. Paul, MN 55133

SLS1	SLS2	LOCATION ID	SHIP VIA	PICKING SLIP NO	REQ SHIP DATE	SHIP DATE
GJL	MSL	MN0001		2	11/4/2011	

ITEM ID	UNIT	BIN	ORDERED	SHIPPED	BACKORDERED
COM100	EA		1.0000		

Multimedia Desktop

BUILDERS SUPPLY

4301 DEAN LAKES BLVD.
SHAKOPEE MN 55379
PHONE: (952)496-2465
FAX: (952)496-2495

PICKING SLIP

BATCH CODE	ORDER NUMBER	ORDER DATE	PAGE
000001	00000020	10/17/13	1
CUSTOMER P.O. NUMBER			

S DALLAS-FT WORTH DOME HOMES	S DAL001
H 1025 37TH AVE SE	O DALLAS-FT WORTH DOME HOMES
I DALLAS TX 77777	L 1025 37TH AVE SE
P	D DALLAS TX 77777
T	T
O	O

SLS 1	SLS 2	LOCATION	SHIP VIA	PICKING SLIP NO.	REQUESTED SHIP DATE	ACTUAL SHIP DATE
DMM		MN0001		000112		

ITEM ID	UNIT OF MEASURE	BIN	ORDERED	SHIPPED	BACK ORDER
001 200200 Water Heater	EA	D-6	3.0000		
002 200300 Air Conditioner	EA	D-7	2.0000		



Business Accounting
and ERP Systems
www.osas.com

This document describes the intended features and technology for OSAS version 8.0 as of August 1, 2017. Features and technology are subject to change and there is no guarantee that any particular feature or technology described in this presentation will be present in this or subsequent versions of OSAS.

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When you have multiple inventory locations, the ability to choose where a picking slips is delivered can mean greater efficiency when employees pick items from the warehouse. Even an option of selecting a particular printer for the picking slips can allow orders to be fulfilled more rapidly.

The ability to deliver picking slips to a location via email, paper, or fax enhances your ability to process sales order shipments in a more timely manner.

Set up Picking Slip Delivery Methods

In order to utilize the location delivery methods for picking slips, you will need to choose some options regarding those methods.

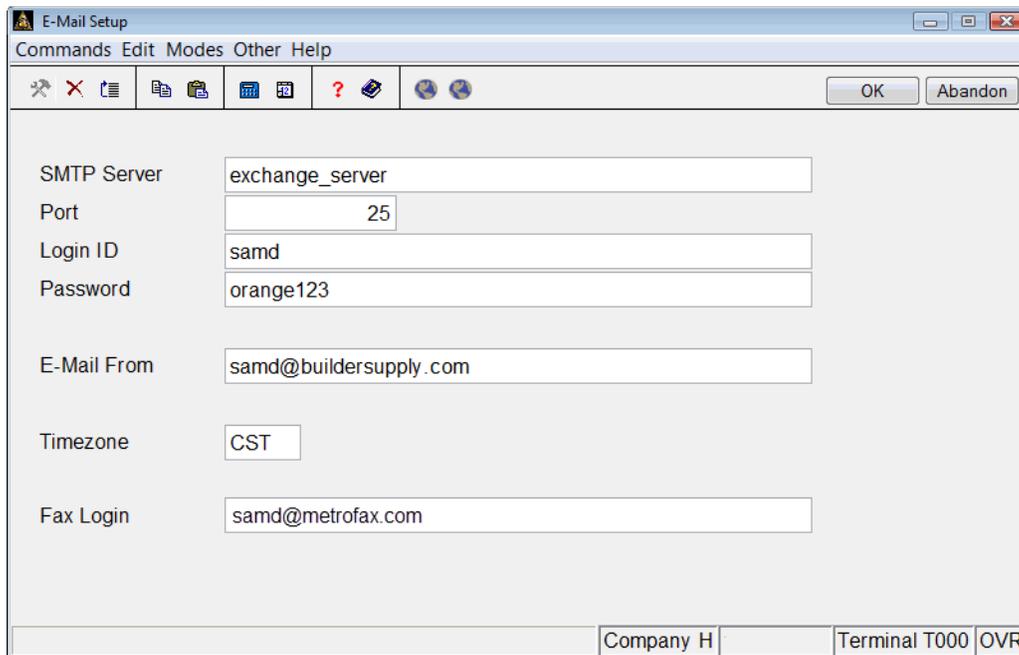
Email Setup

Use the E-Mail Setup function to enter details about your email server, login ID and password, and the address you use to send and receive email. You must enter information about your email system before you can email picking slips or other reports.

If you want the option to send picking slips by fax, you must also have a subscription to MetroFax.

Refer to the Resource Manager User Guide for more information.

1. Select **E-Mail Setup** from the Resource Manager Installation and Configuration menu. The E-Mail Setup screen appears.



The screenshot shows the 'E-Mail Setup' window with the following fields and values:

SMTP Server	exchange_server
Port	25
Login ID	samd
Password	orange123
E-Mail From	samd@buildersupply.com
Timezone	CST
Fax Login	samd@metrofax.com

At the bottom of the window, there are fields for 'Company H', 'Terminal T000', and 'OVR'. The window also has a menu bar (Commands, Edit, Modes, Other, Help) and a toolbar with icons for back, forward, and other actions, along with 'OK' and 'Abandon' buttons.

2. Enter the name of your email server in the **SMTP Server** field.

If you use SSL, you must also ensure the following:

- An SSL device is listed in the config.bbx file.
- The **SMTP Server** field must include **ssl:** as part of the server name. For example:
ssl:email_server_name.

Note: If you are using BBJ 14.10 or higher and use TLS, the additional configuration for TLS is completed for you automatically.

3. Change the **Port** number, if necessary. If you use an email server via an ISP, check with the ISP for the correct port number.
4. If your SMTP server requires authentication, enter your **Login ID** and **Password**; otherwise, leave these fields blank. The password is saved in an encrypted password file.
5. Enter your e-mail address in the **E-Mail From** field.

OSAS uses the address you entered in the **E-Mail From** field in the Resource Manager Preferences function first when creating e-mail messages. If you leave that field blank, OSAS uses the address you enter here when creating e-mail messages.

You cannot change the address that appears in the **E-Mail From** field on the E-Mail Information screen that appears when you send e-mails through OSAS.

6. Enter your time zone (for example, CST for Central Standard Time, MDT for Mountain Daylight Time, and so on).
7. If you are a MetroFax subscriber and want the option of sending OSAS forms by fax, enter your MetroFax **Fax Login**.
8. Use the **Proceed (OK)** command to save your changes and return to the menu.

Resource Manager Email Option

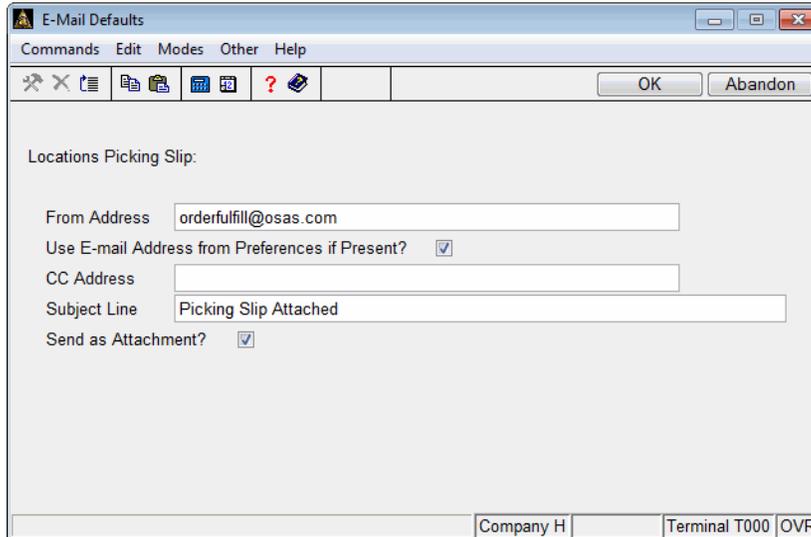
To allow review and management of picking slips to be emailed or faxed from the system, set the **Send E-mails Immediately?** option in the **Options and Interfaces** screen on the Resource Manager Company Setup menu to **No**. This will cause the system to hold emails to be sent in a queue.

You can open the **E-Mail Queue** screen from the Resource Manager Company Setup menu. In this screen, you can review the pending emails by the user who generated them.

E-Mail Defaults

If you want to set up a specific email address, subject line, or opt to send the picking slip as an attachment, set up email defaults for the Locations Picking Slip.

1. Select **E-Mail Defaults** from the Inventory Codes Maintenance menu. The E-Mail Defaults screen opens.



2. If you want the picking slip emails to show a certain from address, enter the address in the **From Address** field.
3. Mark the **Use E-mail Address from Preferences if Present** check box to use the default **E-Mail From** address on the Preferences screen on the Resource Manager User Setup menu as the From address for the Locations Picking Slip email.

If this check box is marked, the system will first look at the user Preferences **E-Mail From** field. If there is a default **E-Mail From** address on the Preferences screen, that is the address it will use as the **From Address** for the picking slip email. If the default **E-mail From** in Preferences is blank, the system will use the email **From Address** on this Inventory E-Mail Defaults screen.

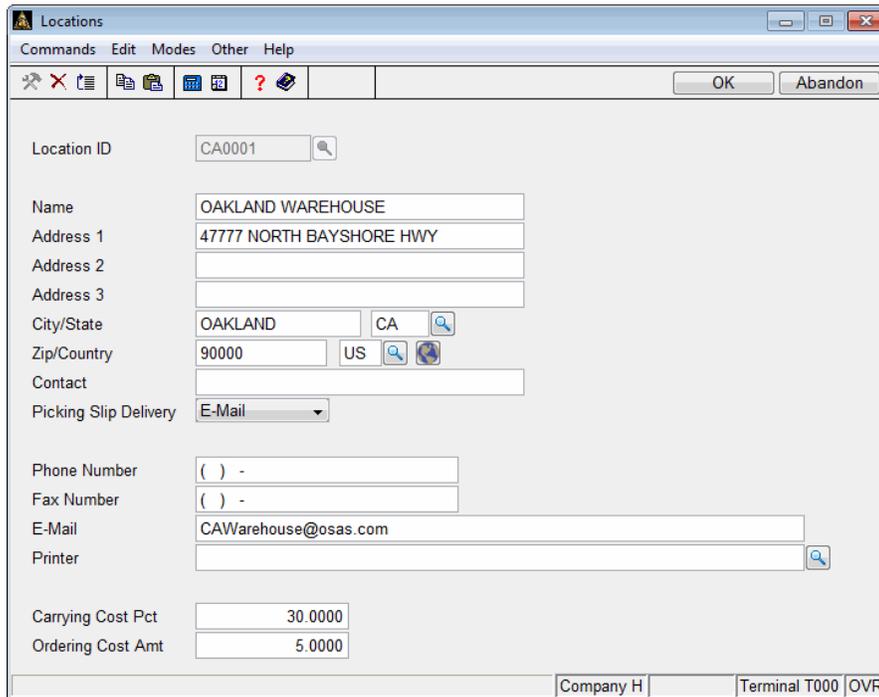
4. Enter an email address to which you want to send a copy of the picking slip email in the **CC Address** field, if applicable.
5. Enter a **Subject Line** to appear on the picking slip emails.
6. Mark the **Send as Attachment** check box to send the picking slip as an attachment to the email. If you want the picking slip to appear in the body of the email, clear this check box.
7. Use the **Proceed (OK)** command to save your changes and return to the menu.

Inventory Locations

You can set the picking slip delivery method by inventory location. Each inventory location can deliver picking slips using a different method.

For more information about the inventory Locations screen, see the Inventory User Guide.

1. Select **Locations** from the Inventory File Maintenance menu. The Locations screen opens.



The screenshot shows the 'Locations' window in OSAS. The window title is 'Locations' and it has a menu bar with 'Commands', 'Edit', 'Modes', 'Other', and 'Help'. Below the menu bar is a toolbar with various icons and two buttons: 'OK' and 'Abandon'. The main area contains a form for editing location details. The 'Location ID' field is set to 'CA0001'. The 'Name' field is 'OAKLAND WAREHOUSE'. The 'Address 1' field is '47777 NORTH BAYSHORE HWY'. The 'City/State' field is 'OAKLAND' and 'CA'. The 'Zip/Country' field is '90000' and 'US'. The 'Picking Slip Delivery' dropdown menu is set to 'E-Mail'. The 'E-Mail' field is 'CAWarehouse@osas.com'. The 'Carrying Cost Pct' field is '30.0000' and the 'Ordering Cost Amt' field is '5.0000'. The bottom right corner of the window shows 'Company H', 'Terminal T000', and 'OVR'.

2. Select a **Location ID** for which you want to set up a picking slip delivery method.
3. Select a **Picking Slip Delivery** method from the drop-down list. There are four options available:
 - **None:** The picking slip report will behave as usual.
 - **Paper:** The picking slip report will print on a printer at the selected location.
 - **E-Mail:** The system will send the picking slip report via email to the location.
 - **Fax:** If you have a MetroFax subscription, this option will send the picking slip report to the location via fax.
4. Depending on the Picking Slip Delivery method you chose:
 - **Delivery by Paper:** If you opt to deliver picking slips to the location by paper, select a **Printer** to print the picking slips at the location. The printers available will be the Java-accessible printers on your computer. If you leave the **Printer** field blank, the system will function as if you selected **None** for your delivery method.
 - **Delivery by E-Mail:** If you choose to deliver picking slips by email, you must enter an **E-Mail** address to which the picking slips will be sent. This is the recipient email address at the location.

- **Delivery by Fax:** If you choose to deliver picking slips by fax, you must enter a **Fax Number** to which the picking slips will be sent.
5. To save your entries, use the **Proceed (OK)** command. Then enter another **Location ID** or use the **Exit (F7)** command to return to the File Maintenance menu.

Print Picking Slips

Once you have set up the location delivery method for your picking slips, you can print online picking slips to a location from a new Sales Order transaction, or print the picking slips to a location from SO Shipping Reports. See the Sales Order User Guide for more information.

On-Demand Picking Slip

Create a new Sales Order transaction as usual. Once you finish entering the order, press **O** or select the **On-Demand Picking Slip** button. Click **Yes** at the verification window.

The screenshot shows the OSAS Orders window with the following details:

Sold to: ACE001 ACE BUILDERS
 Ship to: MN0001
 Loc ID: MN0001
 Batch ID: 000001
 Order No: 00000028
 (New)

Item/Job ID	Qty Ordered	Units	Unit Price	Ext Price
800001	20.0000	ROLL	5.6300	112.60
Wallpaper - Conte...	.0000			
810001	5.0000	5GAL	69.7950	348.98
Paint - White - E...	.0000			.00

Entry (003 of 003)

Subtotal	Freight+Misc	Sales Tax	Prepayment	Net Due
461.58	.00	30.00	.00	491.58

Buttons: Enter=edit, Append, Header, Totals, View, Go to, On-Demand Picking Slip, Packing List, Recalculate prices, Next transaction, Ship tracking

Company H Terminal T000 OVR

Verification dialog box: Print On-Demand Picking Slip? (Y/N)
 Yes No

The On-Demand Picking Slips screen opens. Enter a **Slip #**, select to **Sort by Bin Number** as necessary, and choose how to **Print Kit Detail** and Bar Codes as appropriate. Mark the **Print Copies of E-Mailed Picking Slips** if you want to print copies of the picking slips sent via email.

On-Demand Picking Slips

Commands Edit Modes Other Help

Slip # 000022

Sort by Bin Number?

Print Kit Detail? Component

Print Bar Codes on? None

Print Copies of E-Mailed Picking Slips?

Company H Terminal T000 OVR

If you did not select a printer on the Inventory Locations screen for the selected **Location ID**, the Output Information screen will appear and you can select your output device as usual.

- If you chose **Printer** for the location picking slip delivery method AND you want to print copies:
 - The first picking slip will print at the location printer you selected in the IN Locations screen for that location. If you did not select a printer on the Inventory Locations screen for the selected **Location ID**, the Output Information screen will appear and you can select your output device as usual.
 - The copies will print to the output device you select in the Output Information screen.
- If you chose **E-Mail** for the location picking slip delivery method AND you want to print copies:
 - The first picking slip will be sent via email to the inventory location.
 - The copies will print to the output device you select in the Output Information screen.
- If you chose **Fax** for the location picking slip delivery method AND you want to print copies:
 - The first picking slip will be sent via email to MetroFax (if you have a subscription), and then faxed to the inventory location.
 - The copies will print to the output device you select in the Output Information screen.

Shipping Reports – Picking Slips

For another option to print location picking slips, select **Picking Slips** from the Sales Order Shipping Reports menu to open the Picking Slips screen.

Mark the check box if you have completed Sales Order entry. Select the **Batches to Print** and the transactions for which you want to print picking slips, enter the **First Slip Number to Print** and **Last Good Slip Number** as applicable, select to **Sort by Bin Number** if applicable, and choose how to **Print Kit Detail** and Bar Codes as appropriate.

Mark the **Print Copies of E-Mailed Picking Slips** if you want to print copies of the picking slips sent via email.

- If you chose **Printer** for the location picking slip delivery method AND you want to print copies:
 - The first picking slip will print at the location printer you selected in the IN Locations screen for that location. If you did not select a printer on the Inventory Locations screen for the selected **Location ID**, the Output Information screen will appear and you can select your output device as usual.
 - The copies will print to the output device you select in the Output Information screen.
- If you chose **E-Mail** for the location picking slip delivery method AND you want to print copies:
 - The first picking slip will be sent via email to the inventory location.
 - The copies will print to the output device you select in the Output Information screen.

- If you chose **Fax** for the location picking slip delivery method AND you want to print copies:
 - The first picking slip will be sent via email to MetroFax (if you have a subscription), and then faxed to the inventory location.
 - The copies will print to the output device you select in the Output Information screen.

Examples

In order to aid in understanding how location delivery methods work, we've included a number of examples.

Things to remember:

- The delivery functionality applies only to Plain Paper Picking Slips.
- You can set the number of copies of any document via the Form Codes screen on the Resource Manager Company Setup menu.
- The first copy of the document generated is always considered **Copy 1** regardless of the delivery method.
- Delivery method = **None**: Prints picking slips as they were printed prior to the implementation of Picking Slip Location Delivery Methods (Build 17206), to the printer location selected in the Output Information screen at the time the function is executed.
- Delivery method = **Paper**: Prints picking slips (and copies) to the **Printer** specified for the Inventory Location. If there is no printer specified for the inventory location, the picking slips will print to the printer location selected in the Output Information screen at the time the function is executed.
- Delivery method = **Email** or **Fax**: *Both methods are treated as emails*. Emails will be sent to the **E-mail Address** defined in the Inventory Location. Faxes will be sent to the **Fax Login** defined in the Resource Manager E-Mail Setup function.
- When you mark the **Print Copies of E-mail Picking Slips** check box, the initial picking slip generated (Copy 1) will be delivered by email. Additional copies will be printed to the printer location selected in the Output Information screen at the time the function is executed.

Here are some examples of where and how the picking slips will be generated based on a sample setup.

Sample Inventory Locations setup:

Location ID	Picking Slip Delivery Method	Email Address	Printer
CA0001	Paper	userWH1@mycompany.com	Printer A
MD0001	None		
MN0001	Paper		
MN0002	Fax	Fax#: 555-555-1111 E-Mail Setup Fax Login: user@metrofax.com	
TX0001	E-Mail	userWH2@mycompany.com	

Scenario 1:

- Print Copies of E-Mail Picking Slip = **NO**
- Form Copies = **1** (one picking slip printed by default)
- Printer selected in Output Information screen = **Printer B**

Order Line	Item ID	Item Location	Output of Copy 1	Output of Add'l Copies
Line 01	100	MD0001	Printer B	N/A
Line 02	300	TX0001	E-Mail (E-Mail Queue)	N/A
Line 03	300	MN0002	Fax (E-Mail Queue)	N/A
Line 04	8100002	CA0001	Printer A	N/A
Line 05	150	MN0001	Printer B	N/A
Line 06	150	MN0002	Fax (E-Mail Queue)	N/A
Line 07	200100	MN0001	Printer B	N/A
Line 08	200400	CA0001	Printer A	N/A

Scenario 2:

- Print Copies of E-Mail Picking Slip = **YES**
- Form Copies = **1** (one picking slip printed by default)
- Printer selected in Output Information screen = **Printer B**

Order Line	Item ID	Item Location	Output of Copy 1	Output of Add'l Copies
Line 01	100	MD0001	Printer B	N/A
Line 02	300	TX0001	E-Mail (E-Mail Queue)	Printer B
Line 03	300	MN0002	Fax (E-Mail Queue)	Printer B
Line 04	8100002	CA0001	Printer A	N/A
Line 05	150	MN0001	Printer B	N/A
Line 06	150	MN0002	Fax (E-Mail Queue)	Printer B
Line 07	200100	MN0001	Printer B	N/A
Line 08	200400	CA0001	Printer A	N/A

Scenario 3:

- Print Copies of E-Mail Picking Slip = **NO**
- Form Copies = **2** (one picking slip printed by default)
- Printer selected in Output Information screen = **Printer B**

Order Line	Item ID	Item Location	Output of Copy 1	Output of Add'l Copies
Line 01	100	MD0001	Printer B	Printer B
Line 02	300	TX0001	E-Mail (E-Mail Queue)	Printer B
Line 03	300	MN0002	Fax (E-Mail Queue)	Printer B
Line 04	8100002	CA0001	Printer A	Printer A
Line 05	150	MN0001	Printer B	Printer B
Line 06	150	MN0002	Fax (E-Mail Queue)	Printer B
Line 07	200100	MN0001	Printer B	Printer B
Line 08	200400	CA0001	Printer A	Printer A

Scenario 4:

- Print Copies of E-Mail Picking Slip = **YES**
- Form Copies = **2** (one picking slip printed by default)
- Printer selected in Output Information screen = **Printer B**

Order Line	Item ID	Item Location	Output of Copy 1	Output of Add'l Copies
Line 01	100	MD0001	Printer B	Printer B (Copy 2)
Line 02	300	TX0001	E-Mail (E-Mail Queue)	Printer B (Copy 1 [E-mail], Copy 2 [Form copy])
Line 03	300	MN0002	Fax (E-Mail Queue)	Printer B (Copy 1 [Fax], Copy 2 [Form copy])
Line 04	8100002	CA0001	Printer A	Printer A (Copy 2)
Line 05	150	MN0001	Printer B	Printer B (Copy 2)
Line 06	150	MN0002	Fax (E-Mail Queue)	Printer B (Copy 1 [Fax], Copy 2 [Form copy])
Line 07	200100	MN0001	Printer B	Printer B (Copy 2)
Line 08	200400	CA0001	Printer A	Printer A (Copy 2)