



DSD Business Systems

Sage 100 Enhancements

MBAD

DSD / ScanForce Multi-Bin Advanced

Version 7.20



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Multi-Bin User's Manual
Version 7.20

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to Sage 100. For instructions on using Sage 100, refer to the appropriate Sage 100 manual, or call your Sage 100 reseller. DSD Business Systems offers excellent Sage 100 support, at an hourly rate.

Web Resources

DSD web site: <http://www.dsdinc.com>

The Enhancement page contains:

- Current Release Schedule*
- Purchasing Information*
- Installation Instructions*
- Product Support*
- Enhancement Links*

MBAD DSD / ScanForce Multi-Bin Advanced:

<http://www.dsdinc.com/enhancement/mbad-multi-bin-advanced/>

The product web page contains:

- Product Description*
- Web Links*
- Current Product Version Table*
- Product Installation File Download*
- Product Manual in .pdf Format*
- Revision History*
- FAQ*

Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate. DSD's telephone number is **858-550-5900**. Fax: **858-550-4900**.

For a hard error, where the program displays an error dialog, report:

- Error number.*
- Program name.*
- Line number.*
- Program version.*

*Exact sequence that caused the error, including menus and menu selections.
Other pertinent information.*

If leaving a message or faxing, please include:

Your name.

Your phone number (and fax if applicable) and extension.

It is possible to be unable to duplicate a problem, because of data corruption or because we have not exactly duplicated a particular operating environment. In such circumstances, we can only continue to try to fix the problem if we can either access the system remotely or duplicate the system.

DSD / ScanForce Multi-Bin Advanced Features

The DSD / ScanForce Multi-Bin Basic Module provides advanced features for warehouse inventory management in Sage 100. DSD / ScanForce Multi-Bin Basic features include:

- Enable Multi-Bin inventory by Warehouse Code, Product Line, or Item Code
- Set Allocation Options based on the data entry type*
- Set customer or item specific restrictions based on Bin Location
- Perform On-The-Fly bin location transfers
- Perform auto-allocations during picking sheet printing*
- Easily setup multi-bin inventory with initial bin transfer
- Maintain a structure and segments for bin locations
- Choose to sort bin locations alphabetically or based on an alternate sort method
- Maintain Lot/Serial Expiration Dates
- Auto-Generate Bin locations
- Define various location types for bin locations
- Set minimum and maximum location quantities for bins
- Perform auto-allocations during data entry*

The DSD / ScanForce Multi-Bin Basic Module from DSD Business Systems is designed to work exclusively with the ScanForce Warehouse Management Solution or as a stand-alone solution. For more information on the ScanForce Warehouse Management Solution visit www.scanforce.com.



**These features are only available with the Multi-Bin Advanced version.*

Section B: Getting Started



• **If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.**

• Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.

- **Check with DSD before installing more than one Enhancement.**

Required Levels

Sage 100 Module	Module Required	Required Level
I/M	Y	7.20

Installation

1. **Back-up:** Exit all Sage 100 sessions. Back-up existing Sage 100 data.
2. **Check Levels:** Sage 100 module levels **must match** those listed above.
3. **Run Enhancement Setup Program:** Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.
4. **Send your Sage Serial Number to your DSD Representative:** Send your Sage Serial Number to your DSD representative in order for us to send you back the encrypted keys to unlock your system. This serial number can be found in Library Master\Setup\System Configuration, Tab 3. Registration as Serial Number.
5. **Re-Start Sage 100:** Sage 100 will be updated.
6. **Unlock the Enhancement:** DSD Enhancements must be unlocked to run. When any part of the Enhancement is run for the first time, the **DSD Enhancement License Agreement and Activation** window will appear. Follow the steps shown on that window. *You can click the Help button for more detailed instructions.*

Note: On the next page is a screenshot of the DSD Enhancement License Agreement and Activation window.

After accepting the License Agreement, you can then select the type of unlocking that you'd prefer. The choices are File, Web, Demo and Manual Entry.

File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from DSD and then proceed to unlock all enhancements contained in the file.

- The Sage 100 system that is being used must have web access for this option to be effective.
- You can send your Sage Serial Number to your DSD Enhancements sales representative.

Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

- Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.

Manual Entry Unlock: If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

Note: You can also unlock a DSD Enhancement through the **DSD Enhancement Control Panel** found on the Library Master Utilities Menu. Then, select the Enhancement with your mouse from the list of Enhancements and click the **Unlock Product** button on the right side of the window.

- Convert Data:** After unlocking, the DSD Conversion Wizard will appear. Follow on-screen instructions to complete data conversion. You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.

The screenshot shows the 'DSD Enhancement License Agreement and Activation' window. It includes a 'License Agreement' section with terms and conditions. Below this are four numbered steps: 1. Agree to License Agreement (with 'Agree' and 'Disagree' radio buttons), 2. Select Unlocking Type (with 'Web', 'File', 'Demo', and 'Manual Entry' radio buttons), 3. Call DSD at 858-550-5900 (with fields for 'End User Name' and 'Serial Number'), and 4. Enter the following from DSD (with an 'Activation Key' field). At the bottom right is an 'Unlock Product' button. The window also has 'Help' and 'Exit' buttons at the bottom.

The screenshot shows the 'DSD Conversion Wizard: Step One, Introduction' window. It features the DSD Business Systems logo at the top. Below the logo, it states: 'This company's data needs to be converted. This program will perform the conversion.' To the right of this text is a small graphic of a person running. At the bottom right, there are 'Cancel' and 'Next' buttons.

DSD Enhancement Control Panel

Starting with version 3.61, all DSD Enhancement products include DSD's Enhancement Control Panel. The **DSD Enhancement Control Panel is accessed from the Library Master Utilities menu.**

The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired task.

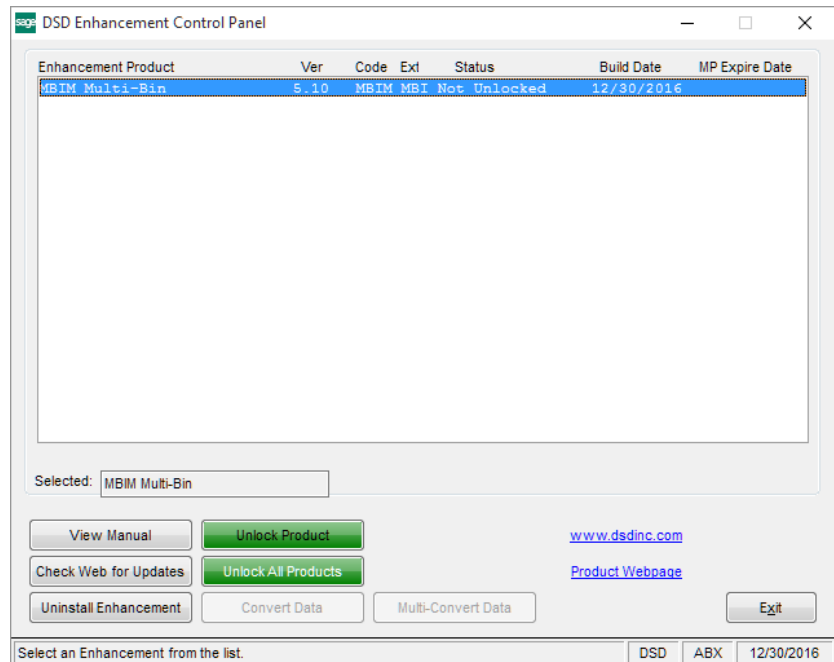
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the "MAS90/PDF" folder in the Sage 100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the "MAS90/PDF" folder and then displayed.

Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

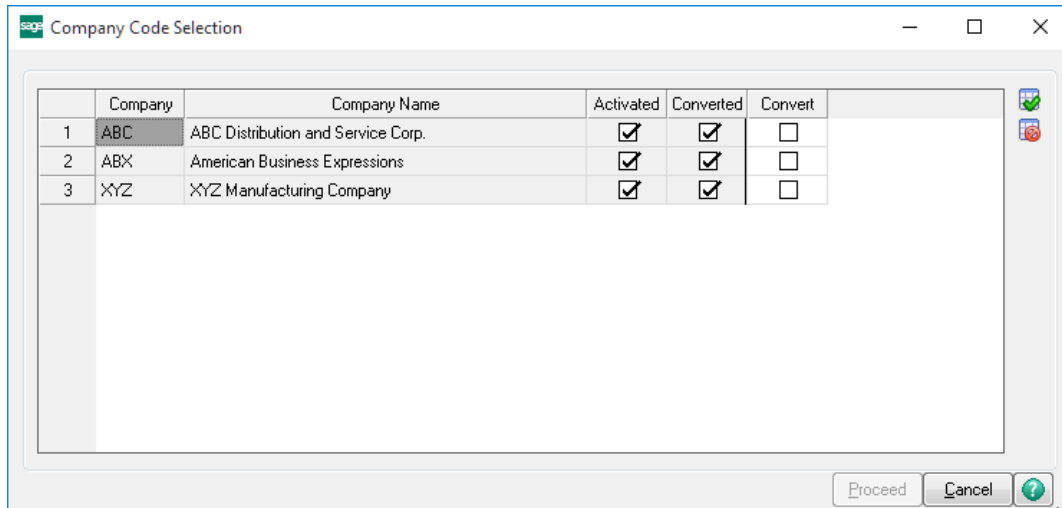
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

Unlock All Products: This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*

Convert Data: After verification, the selected Enhancement's data conversion program will run. Data conversion is non-destructive, and may be triggered any number of times. Sometimes this is required to fix data records imported or updated from a non-enhancement installation.



Multi-Convert Data: Multiple Companies can be converted at the same time for a given Enhancement. *(If you have a large number of Companies to convert, please do in batches of 20 or fewer due to memory limitations.)*



Help: The Help button, located at the bottom right of the window, opens an HTML help file.

Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system. (for more information see [Uninstall DSD Enhancements](#))

Section C: Setup

New Implementation Procedure

The following procedure is the recommended steps for a new implementation of DSD / ScanForce Multi-Bin Advanced. It is also recommended that these steps be performed first in a test company before implementing in a live operating company.

1. Activate the Multi-Bin module in Library Master Company Maintenance.
2. Access Role Maintenance and ensure that you have full access to the Multi-Bin Module.
3. Open Multi-Bin Options and enable Multi-Bin for this company code. (For more information see [Multi-Bin Options](#))
4. Determine if Location Types are needed and setup Location Types in Location Type Maintenance. (For more information see [Location Type Maintenance](#))
5. Determine which warehouse codes will be using Multi-Bin and what you will use for a Bin Structure.
6. Enable Multi-Bin for each warehouse code and set up segments if desired. Then perform the initial bin transfer. Initial Bin Transfer is required when enabling a warehouse code. Set your allocation options and default locations for each of the warehouse codes. (see [Warehouse Bin Maintenance](#) and [Segment Code Maintenance](#))
7. Use Auto-Generate Bin Locations utility to create bins based on defined segments (see Auto Generate Bin Locations Utility)
8. If default bin locations can be defined by Item Product Line, use the Product Line Bin Maintenance to assign default locations. (see [Product Line Bin Maintenance](#))
9. Use Bin Location Maintenance to set up additional Bin Locations manually. (see [Bin Location Maintenance](#))
10. Use Item Bin Maintenance to set specific settings for items by warehouse code. (see [Item Bin Maintenance](#))

Multi-Bin Inventory Management Options

Multi-Bin Inventory Management Options presents a series of options to allow you to select features most appropriate for your business. You can access this task by selecting Multi-Bin Options from the Setup menu in the Multi-Bin module. This task must be completed first during the initial setup of the Multi-Bin module.

Main Tab

Allow Multi-Bin Distribution: This option must be enabled in order to allow multi-bin distributions for this company code. You will not be allowed to make changes to this option if data entry or allocations are currently in process.

Allow On-The-Fly Bin Locations: Enable this option to allow users to enter bin locations on-the-fly during data entry tasks.

Allow Quick Bin Transfer: Enable this option to allow users access to Quick Bin Transfers while in Bin Location Maintenance or in Item Bin Maintenance. (For more information see [Bin Location Maintenance](#) and [Item Bin Maintenance](#).)

Next Automatic Quick Bin Transfer Number: This sequence number is used each time a user creates a Quick Bin Transfer. This number may not be overridden and is for display purposes only.

Bin Location Sort Method: Choose the method in which bin locations will be sorted. **Select from “Alphabetical” or “Alternate Sort”.** Alternate sorts may be defined at the Bin Location level. (For more information see [Bin Location Maintenance](#))

Lot/Serial Expiration Date UDF: Select a date type IM_ItemCost user defined field to enable additional options for Lot/Serial allocations. When a UDF is selected, you will be allowed to set allocation for Lot/Serial items automatically based on the Lot/Serial Expiration Date. (See [Allocation Options](#))

Note for Version 2020: In this version, Sage has added Lot/Serial Expiration Date functionality. The Multi-Bin 2020 version now supports this new Sage functionality -or- the original **Lot/Serial Expiration Date UDF**. If you would like to continue using the original **Lot/Serial Expiration Date UDF** functionality, then do not setup the new Sage functionality (in Item Maintenance). If you would like to use the new Sage 2020 functionality, then setup the new **Lot/Serial Expiration Date** settings in Item Maintenance, and the original Multi-Bin **Lot/Serial Expiration Date UDF** functionality will be ignored.

Item Maintenance/Inquiry

Change double-click drill down of warehouse to open Item Bin Maintenance: Enable this option to change the double click drill down feature in Item/Maintenance inquiry to open the Item Bin Maintenance screen. With this option disabled, the standard Quantity Recap screen will be displayed.

Entry Tab

Multi-Bin Inventory Management Options (ABC) 12/18/2020

1. Main 2. Entry 3. Printing

Item Bin Maintenance

Default View to Lot/Serial ☐

Display Lot/Serial Expiration Date ☒

Distribution

Lot/Serial Distribution Order Bin Location First ▼

Auto-Allocation Option Prompt to Auto-Allocate ▼

Default to Prior Value ☐

Allow Negative Bin Quantities (Non-Lot/Serial) ☐

Replenishment

Next Automatic Replenishment Entry Number 00000001

Default Replenishment Type Restock ▼

Default Put Away From Selection From Bin Location ▼

Default Restock To Selection To Bin Location ▼

Default Put Away Report Sort Sort by Bin Location ▼

BM/WO

Enable Negative Auto-Allocation in BM/WO ☐

Enable Auto-Allocation in BM/WO for Unavailable Quantities ☐

Sales Order Distribution

Disable Bin Distribution Auto-Popup ☐

Bypass Prompt to Delete Line if Distribution is Incomplete ☐

Invoice / Shipping Distribution

Ship Allocated Quantity No ▼

Only Auto-Ship from Enabled Location Types ☐

Auto-Increment Bin/Lot/Serial ☒

Min/Max Quantity

Min/Max Usage Replenishment and Data Entry ▼

S/O

Do Not Partially Allocate Kit Components ☐

Accept Cancel Print ?

Item Bin Maintenance

Default View to Lot/Serial: Enable this option to default the Quantity view in Item Bin Maintenance to Lot/Serial. With this option disabled, the view will default to "Item". For more information, see [Item Bin Maintenance](#).

Display Lot/Serial Expiration Date: Enable this option to display the lot serial/expiration date in both Item Bin Maintenance and Bin Location Maintenance on the quantity tab.

Distribution

Lot/Serial Distribution Order: Select from this drop down the method in which Lot/Serial Items will be distributed. “Bin Location First” will allocate Lot/Serial items based on the bin location options first. “Lot/Serial First” will allocate first based on the lot/serial numbers.

Auto-Allocation Option: The Auto-Allocation features are only available in the Multi-Bin Advanced Product. For more information, see [Multi-Bin Advanced Features](#)

Default to Prior Value: Enable this option to have the Bin Location automatically default to the prior selection while in data entry screen. This can be manually changed at the warehouse level in Warehouse Bin Maintenance. (For more information see [Warehouse Bin Maintenance](#))

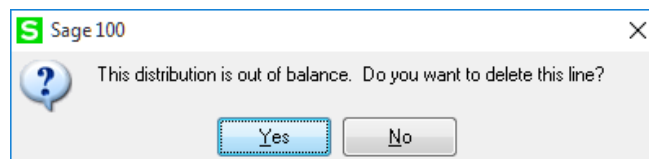
Allow Negative Bin Quantities (non-Lot/Serial): Enable this option to allow negative quantities in bin locations. The valued stored here in options is a default and can be manually changed at the warehouse level in Warehouse Bin Maintenance. (For more information see [Warehouse Bin Maintenance](#))

Replenishment: The Replenishment features are only available in the Multi-Bin Advanced Product. For more information, see [Multi-Bin Advanced Features](#) in the Multi-Bin Advanced Features section.

Sales Order Distribution

Disable Bin Distribution Auto-Popup: Select this option to disable the automatic display of the Bin Distribution screen when entering a multi-bin enabled item during sale order entry. With this option enabled the user can manually click on the distribution button in sales order entry to manually allocate items if desired. **Note:** The option in Sales Order Options to allow distribution of Lot/Serial numbers must be enabled in order to perform distributions in Sales Order Entry.

Bypass Prompt to Delete Line if Distribution is incomplete: With this option disabled, users will be prompted during sales order entry if distribution is incomplete. When this option is enabled, the prompt will be bypassed and will no longer appear.

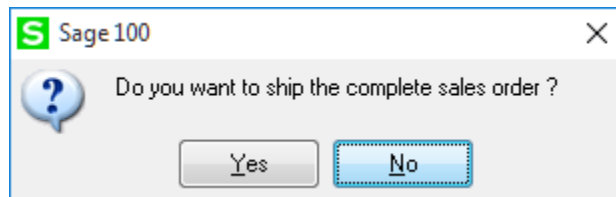


Invoice/Shipping Distribution

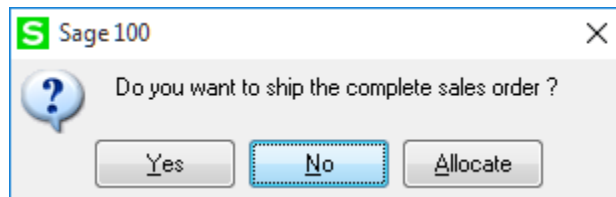
Ship Allocated Quantity: The “Ship Allocated Quantity” in Multi-Bin Options, allows users to determine how items that were previously allocated (either during Sales Order Entry or Picking Sheet Printing) will affect the shipping of items during Invoice and Shipping Data Entry. Users can select from “Yes”, “No” or “Prompt”.

If **“Yes”** is selected, no message box will appear when selecting the lines of an invoice and only items which were previously allocated will be marked as shipped. Non Multi-Bin enabled items or items which were not previously allocated will not be marked as shipped.

If **“No”** is selected, Invoice Data Entry and Shipping Data Entry will prompt the user when accessing the detail lines “Do you want to ship the complete sales order?”. If “No” is selected in this message box, no items will be marked as shipped in the invoice. If “Yes” is selected, all items will be marked as shipped regardless of previous allocations, however all allocations performed on the sales order will still carry over into the invoice.



If **“Prompt”** is selected, the user will be presented with a new prompt when accessing detail lines in Invoice/Shipping Data Entry. The user can then choose “Yes” to ship the complete sales order and all items will be marked as shipped, “No” and no items will be marked as shipped or “Allocate” and only allocated items will be marked as shipped.



Only Auto-Ship from Enabled Location Types: Select this checkbox to enable the new **Auto-Ship when allocated in SO Entry** checkbox in Location Type Maintenance. This allows the user to enable/disable certain Location Types for this feature.

Auto-Increment Bin/Lot/Serial: With this option enabled and the “Auto-Increment Quantity” enabled in Shipping Setup Options, bin distribution quantities will be auto-incremented when auto-incrementing quantities in shipping data entry for scanning. This option will work with both Lot/Serial and non-Lot/Serial Items

Min/Max Quantity

The **Min/Max** feature for Replenishment is only available in the Multi-Bin Advanced Product. For more information, see [Multi-Bin Advanced Features](#) in the Multi-Bin Advanced Features section.

S/O

The **Auto-Allocate in Increments of Sales U/M** is only available in the Multi-Bin Advanced Product. For more information, see [Multi-Bin Advanced Features](#) in the Multi-Bin Advanced Features section.

Printing Tab

Recap:

Multi-Bin recaps can be printed during the posting of inventory transactions. Select from “Do Not Print”, “Bin Location Order” and “Alternate Sort”. Printing these recaps for inventory transactions will list which items need to be picked and which items will need to be put-away from the bin locations.

Picking Sheets:

Print Picking Sheets By: Select from this drop down the default method for printing picking sheets. This option may be changed during picking sheet printing. Available options for picking sheet printing are “Order”, “Bin/Item” and “Bin/Item/Order”.

Allow Auto-Allocation During Picking Sheet Printing: The Picking Sheet Auto-Allocation features are only available in the Multi-Bin Advanced Product. For more information, see [Picking Sheet Printing](#) in the Multi-Bin Advanced Features section.

Enable PO ROG Update to print SO Picking Sheets: For more information, see [Multi-Bin Advanced Features](#) in the Multi-Bin Advanced Features section.

Populate ‘Available’ Fields: Select this checkbox to populate the ‘Available’ fields on the Picking Sheet Printing for available bins. If a Sales Order line has NOT been fully allocated to a bin location(s), then the Picking Sheet can print which bins have that item **available**. There are 10 sets of fields that

correspond to the available bins: SO234_MBI_AvailBinLocation01, SO234_MBI_AvailPallet01, SO234_MBI_AvailLotSerial01 , and SO234_MBI_AvailQuantity01. These 4 fields are repeated 1-10, so the program will therefore print up to 10 bin locations that have those items available. The user must add these fields to the Crystal Form.

Include Serial Numbers in 'Available' fields: Select this checkbox to populate the 'Available' fields SO234_MBI_AvailLotSerial01 thru SO234_MBI_AvailLotSerial10 for **Serial Number** items.

Include Lot Numbers in 'Available' fields: Select this checkbox to populate the 'Available' fields SO234_MBI_AvailLotSerial01 thru SO234_MBI_AvailLotSerial10 for **Lot Number** items.

Allow Auto-Ship from Picking Sheet Printing: For more information, see [Multi-Bin Advanced Features](#) in the Multi-Bin Advanced Features section.

Location Type Maintenance



Location Type Maintenance is used to define various types or areas of bin locations. This task may also be used to set specific transaction restrictions for bins assigned with this location type. Minimum and Maximum quantities may be defined by location type as well.

Transaction Restrictions	Disallow
IM Receipts	<input type="checkbox"/>
IM Transfer From	<input type="checkbox"/>
IM Transfer To	<input type="checkbox"/>
IM Issues	<input type="checkbox"/>
IM Sales	<input type="checkbox"/>
PO Receipts	<input type="checkbox"/>
PO Returns	<input type="checkbox"/>
PO Material Req	<input type="checkbox"/>
Sales Orders	<input type="checkbox"/>
SO Invoices	<input type="checkbox"/>
RMA	<input type="checkbox"/>
BM Production Entry	<input type="checkbox"/>
BM Disassembly	<input type="checkbox"/>
PM Transactions	<input type="checkbox"/>
Replenishment From	<input type="checkbox"/>
Replenishment To	<input type="checkbox"/>
SO Auto Allocate	<input type="checkbox"/>

Auto-Ship when allocated in SO Entry ☐

Minimum Quantity

Maximum Quantity

Accept Cancel Delete  

Typical location types may include "Picking", "Shipping", "Receiving" or "Overstock". Location types may also be used to define regions or other areas within your warehouse.

Modules which are not installed/setup will not be available for selection. Work Order transactions are only available if the Multi-bin Work Order (MBWO) enhancement is installed.

Replenishment is only available with Multi-Bin Advanced installed. For more information on Replenishment, see [Multi-Bin Advanced Features](#).

Warehouse Bin Maintenance

The Warehouse Bin Maintenance task is used to enable Multi-Bin distribution for each warehouse code, set warehouse specific settings and allocations, define the Bin location structure, and perform the initial bin transfer.

Note: You must perform the initial bin transfer when first enabling Multi-Bin Distribution in a warehouse. It is recommended that any negative inventory be corrected prior to enabling Multi-Bin distribution.

Warehouse Bin Maintenance (ABC) 12/27/2016

Warehouse Code: 000 CENTRAL WAREHOUSE

1. Main | 2. Allocations

Settings

Allow Multi-Bin Distribution ☒ Allow Negative Bin Quantities (non-Lot/Serial) ☒ Allow On-The-Fly Bin Locations ☒
 Allow Quick Bin Transfer ☒ Bin Location Sort Method: Alphabetical

Structure

Segment	Segment Name	Len	Separator	From	To
1	Aisle	1	- dash	A	Z
2	Rack	3	- dash	000	ZZZ
3	Bin	2	- dash	00	99
4		0			
5		0			

Settings for Initial Transfer into Bins

Default Bin Location: A-000-00
 Use Item/Warehouse Bin Location if setup: ☒

Accept Cancel Delete Print Help

Allow Multi-Bin Distribution: Enable this option to allow multi-bin distributions for this warehouse code.

Allow Quick Bin Transfer: Enable this option to allow Quick Bin transfers in Item Bin Maintenance and Bin Location Maintenance. Quick Bin Transfers allow for items to be quickly moved from one location to another without creating inventory transactions.

Allow Negative Bin Quantities (non-Lot/Serial): Enable this option to allow negative quantities in bins for non-lot/serial items. When creating non-lot/serial allocations which will create a negative quantity in the bin location, users must also have the “Allow Negative Bin Quantities (non-LS)” option enabled in Role Maintenance Security Options.

Bin Location Sort Method: Select from “Alphabetical” or “Alternate Sort”. Use the “Alternate Sort” method to customize the pick/put away order. The “Alternate Sort” for each bin is assigned in Bin Location Maintenance.

Allow On-The-Fly Bin Locations: Enable this option to allow On-The-Fly bin locations during data entry tasks.

Bin Location Structure

The Bin Location Structure can be used to assign a specific format and segments for your bin location codes. Typical segments may include “Aisle”, “Rack”, “Bin”, etc. You may define up to 5 segments for your Bin Location Structure. Segments are not required, however you must define at least one segment in order to use the “Auto Generate Bin Locations” utility. After defining the Bin Location Structure, select the “Create Segment” icon above the Structure grid to access the “Segment Code Maintenance” task. For more information see [Segment Code Maintenance](#).

Warehouse Bin Maintenance (MBD) 4/5/2016

Warehouse Code: 001 EAST WAREHOUSE

1. Main | 2. Allocations

Settings

Allow Multi-Bin Distribution ☒ Allow On-The-Fly Bin Transfer ☒

Allow On-The-Fly Bin Locations ☒ Bin Location Sort Method: Alphabetical

Structure

Segment	Segment Name	Len	Separator	From	To
1	Aisle	1	- dash	A	Z
2	Rack	3	- dash	000	ZZZ
3	Bin	2	- dash	00	99
4		0			
5		0			

Settings for Initial Transfer into Bins

Default Bin Location: A-000-00

Use Item/Warehouse Bin Location if setup ☒

Accept Cancel Delete

Settings for Initial Transfer into Bins

The settings for initial transfer into bins are required when first enabling a warehouse code for Multi-Bin Distribution. At least one bin location must be defined in Bin Location Maintenance for the initial transfer. These settings are only visible when first enabling a warehouse code

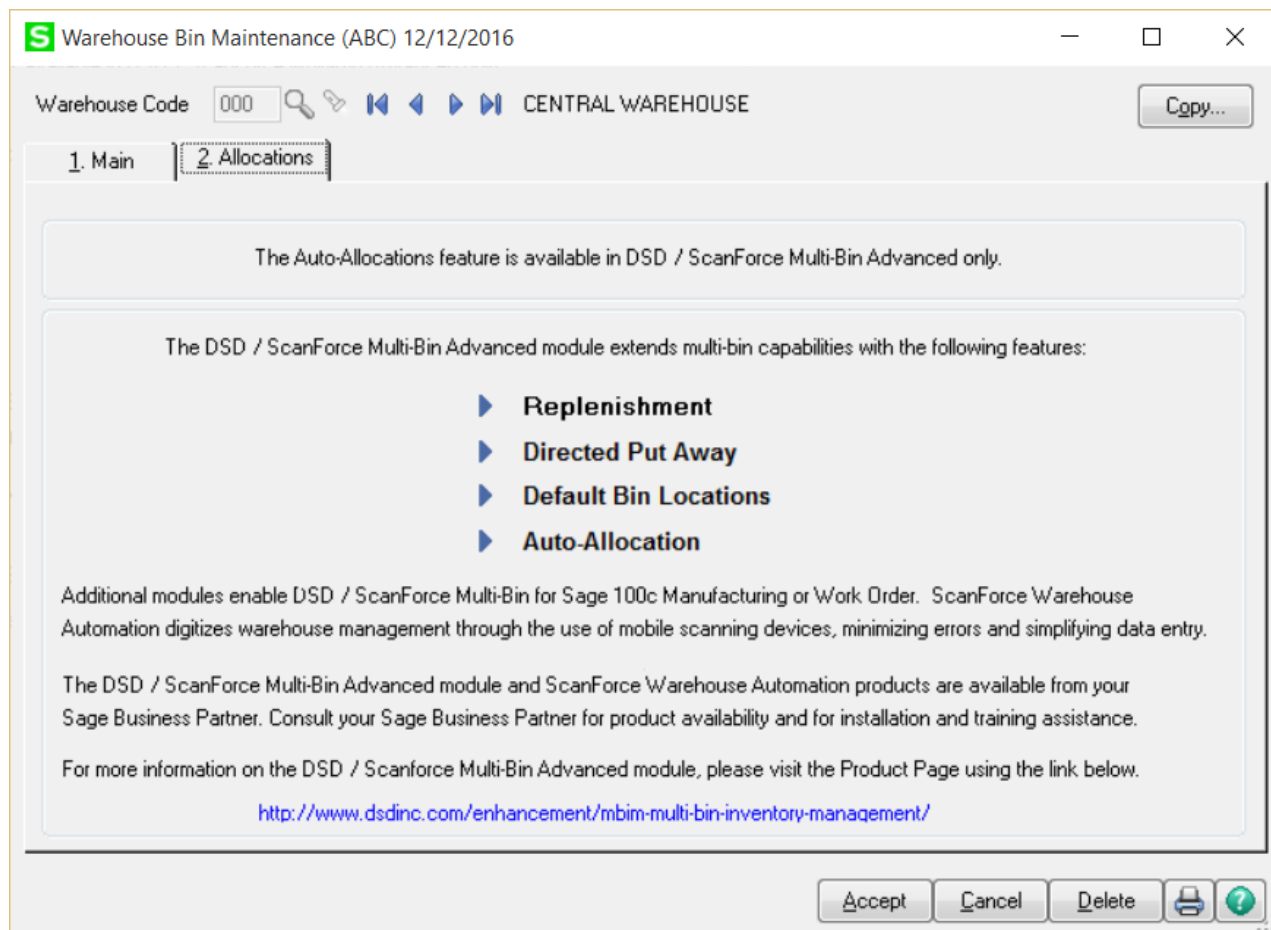
Default Bin Location: Enter a default bin location for all inventory items to be transferred into. This field is required. Any item with a quantity on hand will be placed into this location code.

Use Item/Warehouse Bin Location if setup: This option may be enabled to create the bin location and transfer items into that location if the bin location field was previously defined in the standard Sage

100 bin location field. Any items without a bin location defined in the standard Sage 100 bin location field will be transferred to the “Default Bin Location” assigned above.

Allocations

The Auto-Allocation features are only available in the Multi-Bin Advanced Product. For more information, see [Multi-Bin Advanced Features](#) in the Multi-Bin Advanced Features section.



Segment Code Maintenance

Segment Code Maintenance is used to create segment codes for your bin locations. Segment codes may be created either manually by entering the segment codes into the left segment code grid, or they can be “Auto Created” by entering the range of digits in the “From” and “To” columns in the grid on the right. Segment codes are required in order to use the Auto Generate Bin Locations utility. This task may be accessed from the Sage 100 menu or from within Warehouse Bin Maintenance.

Example: If you wish to generate segments 100 – 800 you would enter the below then select the “Auto Create” button.

Segment Code Maintenance (ABC) 4/24/2016

Warehouse Code: 000 CENTRAL WAREHOUSE Segment: 1

Segment Code	
1	100
2	200
3	300
4	400
5	500
6	600
7	700
8	800
9	

From	To
1	8
0	0
0	0

Example: If you wish to generate segments A10 – A29 you would enter the below then select the “Auto Create” button.

Segment Code Maintenance (ABC) 4/24/2016

Warehouse Code: 000 CENTRAL WAREHOUSE Segment: 1

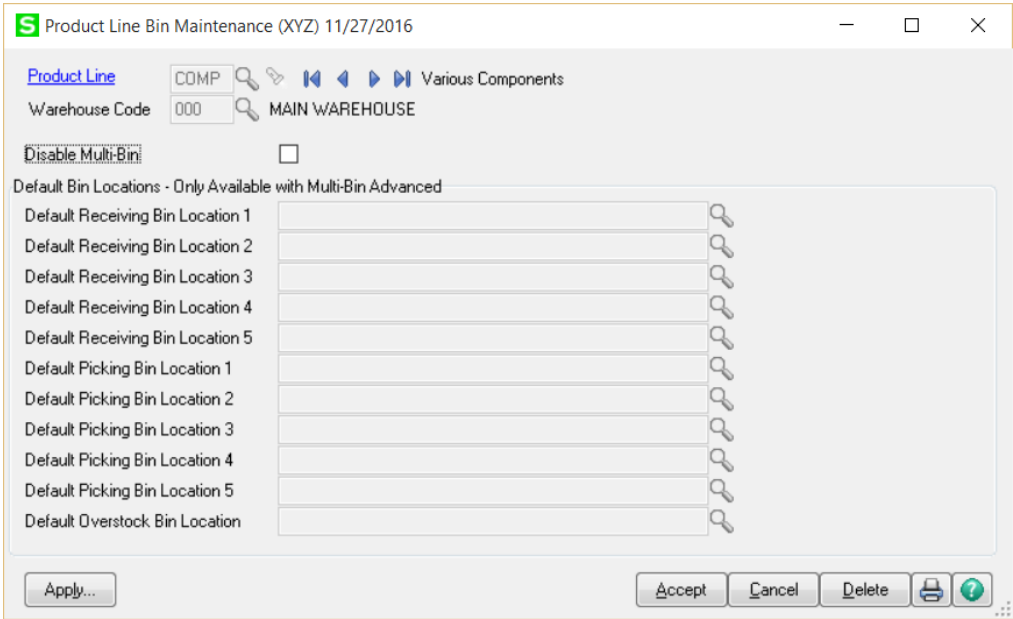
Segment Code	
1	A10
2	A11
3	A12
4	A13
5	A14
6	A15
7	A16
8	A17
9	A18
10	A19
11	A20
12	A21
13	A22
14	A23
15	A24
16	A25
17	A26
18	A27
19	A28
20	A29
21	

From	To
A	A
1	2
0	9

Auto Create Accept Cancel ?

Product Line Bin Maintenance

Use the Product Line Bin Maintenance task to optionally choose to disable multi-bin distribution for specific product lines or assign default bin locations by product line. Choose the “Apply” button at the bottom of this screen to apply change made to existing items.



The Default Bin Location features are only available in the Multi-Bin Advanced Product. For more information, see [Multi-Bin Advanced Features](#) in the Multi-Bin Advanced Features section.

Section D: System Operations

Bin Location Maintenance

The Bin Location Maintenance task is used to create new bin locations, define bin specific settings and restrictions, view historical transaction information, and view current item allocations.

Main Tab

Bin Location Maintenance (ABC) 1/18/2017

Warehouse Code: 000 CENTRAL WAREHOUSE

Bin Location: A-100-00

Description: Picking Location: A-100-00

Copy... Transfer...

1. Main | 2. Restrictions | 3. Items | 4. Quantity | 5. Transactions | 6. Allocations

Segment	Setting	Sort
Aisle	A	
Rack	100	
Bin	00	

Active: ☒

Location Type: PICKING

Minimum Quantity: .00

Maximum Quantity: .00

	Date	User	Quantity	Item
Last Received			.00	
Last Issued			.00	
Last Sold			.00	

Notes:

Accept Cancel Delete ?

Sort: Enter an optional “Alternate Sort” for each bin location segment. The sort defined in this grid is only used if “Alternate Sort” has been chosen as the sort method in Warehouse Bin Maintenance.

Active: By default, all bin locations are set to “Active”. Uncheck this checkbox to set a bin location as inactive. Bin locations set as inactive are not available for distribution during data entry tasks.

Location Type: Select a location type to assign to this bin location. Location types can be defined in Location Type Maintenance.

Minimum Quantity/Maximum Quantity: Enter a minimum and/or maximum quantity for this bin location. If these values are set to 0, then there is no minimum or maximum assigned to this location. If a maximum is set, this will limit the quantity allowed in this location.

Copy: Select the “Copy” button to copy the bin settings from this location to another bin location.

Transfer: Select the “Transfer” button to transfer all items in this location to another bin location. This button is only available if the “Allow Quick Bin Transfers” option has been enabled in Multi-Bin Options. For more information see [Quick Bin Transfers](#).

Restrictions Tab

Bin Location Maintenance (ABC) 6/28/2020

Warehouse Code: 000 CENTRAL WAREHOUSE

Bin Location: A-100-00

Description: Picking Location: A-100-00

1. Main 2. Restrictions 3. Items 4. Quantity 5. Transactions 6. Allocations

Transaction Restrictions	Disallow
IM Receipts	<input checked="" type="checkbox"/>
IM Transfer From	<input type="checkbox"/>
IM Transfer To	<input type="checkbox"/>
IM Issues	<input type="checkbox"/>
PO Receipts	<input checked="" type="checkbox"/>
PO Returns	<input checked="" type="checkbox"/>
PO Material Req	<input checked="" type="checkbox"/>
SO / IM Sales / RMA	<input type="checkbox"/>
BM Production Entry	<input type="checkbox"/>
BM Disassembly	<input type="checkbox"/>
W/O Transactions	<input type="checkbox"/>
Replenishment From	<input type="checkbox"/>
Replenishment To	<input type="checkbox"/>

Item Restriction: None

Customer / Order Restriction: None

Accept Cancel Delete

Item Restriction: Select from this drop down to specify specific item-based restrictions for this bin location. Select from “None”, “Item-Specific”, “Product Line-Specific”, “Same Item”, “Same Product Line”, or “Product Line UDF”. This can be used to restrict different items from being placed into a bin. “Same Item” or “Product Line” restriction can be set only if the bin location is not empty and contains the same items (items with the same product line).

Example: If the Item Restriction is set to “Item Specific” and the item code selected is “6655” only item 6655 may be put into this location.

If the “Product Line UDF” is selected, then you must first create a Custom Office UDF in Product Line Maintenance called “UDF_BIN_RESTRICTION”. With this option set, you may only put an item in this location if the UDF value for a Product Line matches Product Line UDF for the Bin Location.

Customer /Order Restriction: Select from this drop down to specify specific customer-based restrictions for this bin location. Select from “None”, “Customer Specific”, “Cust Sort Specific”, “Cust Type Specific”, or “Sales Order Specific”.

Select the “Customer Specific” to only allow a specific customer to relieve inventory from this bin.

Example: If the Customer Restriction is set to “01-ABF” only orders/invoices for this customer can use this bin.

Select the “Cust Sort Specific” to only allow customers that match the Customer Sort field in Customer Maintenance to relieve inventory from this bin.

Select the “Cust Type Specific” to only allow customers that match the Customer Type field in Customer Maintenance to relieve inventory from this bin.

Select the “Sales Order Specific” to only allow a specific Sales Order to allocate inventory from this bin.

These restrictions do not affect inbound transactions such as purchase order receipts or inventory receipts. This restriction affects only transactions in the sales order module.

Transaction Restrictions: Enable the checkboxes in the transaction restrictions grid to disallow the use of this bin for certain transaction types.

Items Tab

The Items Tab in Bin Location Maintenance is used to define Item/Bin specific minimum and maximum quantities. These are particularly useful during the Replenishment Selection process (and are required for using Restock) however they are applicable throughout the entire system. Items listed here are not a restriction on the bin, however the maximum quantities are honored during any inbound distribution of bin quantities. Example, if an item/bin combination has a maximum set of 100, no more than 100 of that item can be received during purchase order receipt of goods entry.

Bin Location Maintenance (ABC) 1/18/2017

Warehouse Code: 001 EAST WAREHOUSE

Bin Location: A-100-00

Description: Picking Location: A-100-00

Copy... Transfer...

1. Main | 2. Restrictions | 3. Items | 4. Quantity | 5. Transactions | 6. Allocations

Transaction Restrictions	Disallow
IM Receipts	<input checked="" type="checkbox"/>
IM Transfer From	<input type="checkbox"/>
IM Transfer To	<input type="checkbox"/>
IM Issues	<input type="checkbox"/>
PO Receipts	<input checked="" type="checkbox"/>
PO Returns	<input checked="" type="checkbox"/>
PO Material Req	<input checked="" type="checkbox"/>
SO / IM Sales / RMA	<input type="checkbox"/>
BM Production Entry	<input type="checkbox"/>
BM Disassembly	<input type="checkbox"/>
WD Transactions	<input type="checkbox"/>
Replenishment From	<input type="checkbox"/>
Replenishment To	<input type="checkbox"/>

Item Restriction: None

Customer Restriction: Customer-Specific Customer No. 01-ABF

Accept Cancel Delete

Quantity Tab

The “Quantity” tab in Bin Location Maintenance shows the quantity on hand, as well as quantities allocated in various types of transactions. Use the drop down below to view the quantities based on item or Lot/Serial. Select a line to enable the “Transfer” button. Selecting the “Transfer” button allows for a user to quickly transfer this item to another bin without having to enter and post an inventory transaction. Quick Bin Transfers must be enabled in Multi-Bin Options in order to access the transfer button in Bin Location Maintenance. For more information see [Quick Bin Transfers](#).

Bin Location Maintenance (ABC) 7/15/2016

Warehouse Code: 000 CENTRAL WAREHOUSE

Bin Location: A-100-00

Description:

1. Main | 2. Restrictions | 3. Items | 4. Quantity | 5. Transactions | 6. Allocations

Quickly transfer items to another location

Item	Description	On Hand	PO Receipts	PO Returns	PO Mat Req	IM Transacti...	SO/IM Sales	Repl From	Repl To	Available
1001-HON-H252	HON 2 DRAWER LETT...	.00	.00	.00	.00	.00	.00	.00	100.00	.00
2480-8-50	DESK FILE 8" CAP 50	.00	.00	.00	.00	.00	.00	.00	100.00	.00
4886-18-14-3	PAPER CADDY 18"W 1...	.00	.00	.00	.00	.00	.00	.00	94.00	.00
D1400	EXECUTIVE DESK ENS...	7.00	.00	.00	.00	.00	.00	.00	.00	7.00
D1700	SECRETARY DESK EN...	21.00	.00	.00	.00	.00	.00	.00	.00	21.00

	On Hand	On PO Rcpts	On PO Rtns	On PO MR	On IM Trans	On SO/IM Slis	On Repl From	On Repl To	Available
Totals	28.00	.00	.00	.00	.00	.00	.00	294.00	28.00

Item: Show Zero Quantities: ☐

Accept Cancel Delete

Transactions and Allocations Tabs

Access the “Transactions” tab to view all transaction history for this bin location. “Allocations” is used to view all current allocations for this bin location.

The screenshot shows two overlapping windows of the 'Bin Location Maintenance (ABC) 7/15/2016' application. The top window is in the 'Transactions' tab, and the bottom window is in the 'Allocations' tab.

Bin Location Maintenance (ABC) 7/15/2016 - Transactions Tab

Warehouse Code: 000 CENTRAL WAREHOUSE
 Bin Location: A-100-00
 Description:

1. Main | 2. Restrictions | 3. Items | 4. Quantity | **5. Transactions** | 6. Allocations

Item	Description	Date	Type	Ref No.	Quantity
D1400	EXECUTIVE DESK ENSEMBLE	7/14/2016	BB	BEGINTRANS	7.00
D1700	SECRETARY DESK ENSEMBLE	7/14/2016	BB	BEGINTRANS	21.00

Bin Location Maintenance (ABC) 7/15/2016 - Allocations Tab

Warehouse Code: 000 CENTRAL WAREHOUSE
 Bin Location: A-100-00
 Description:

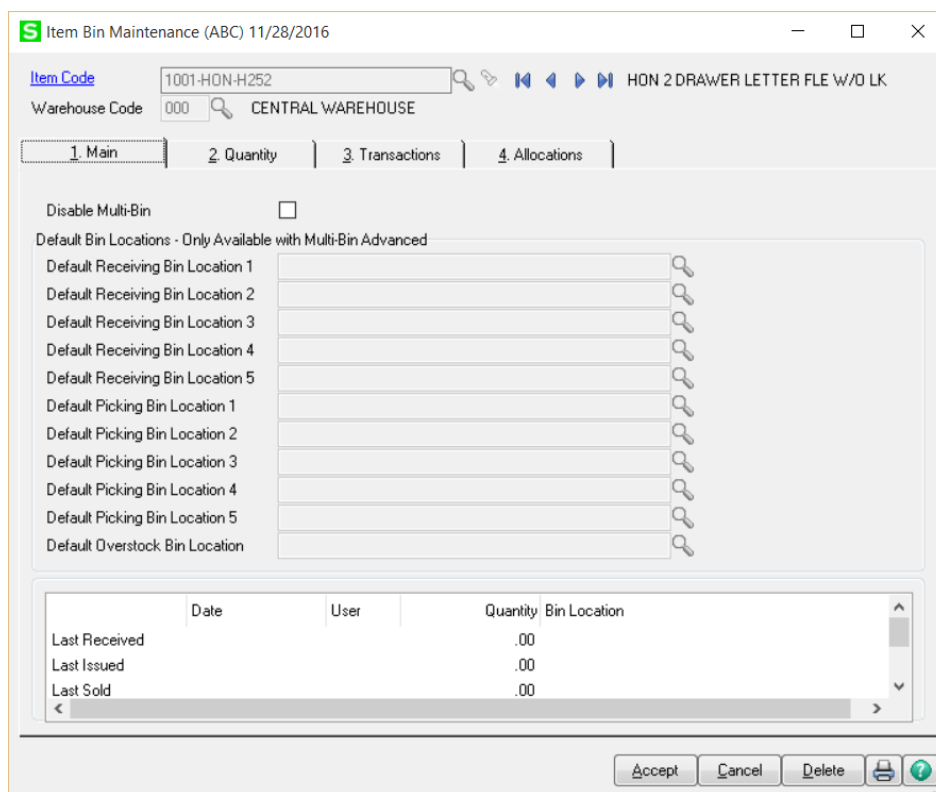
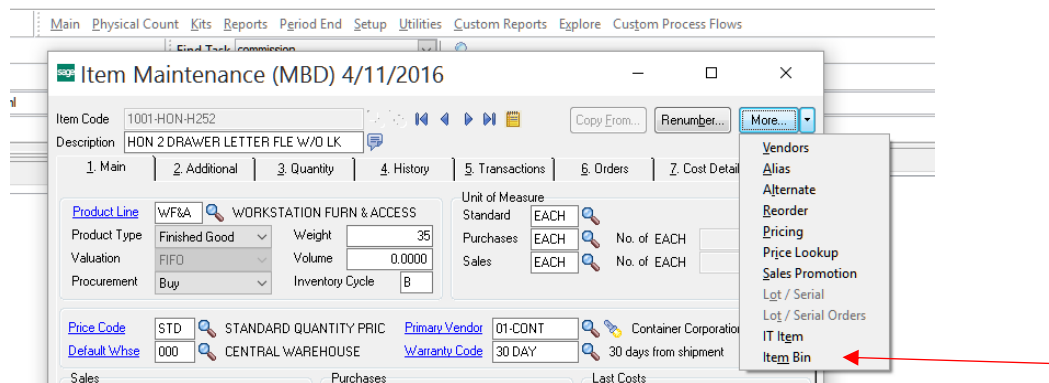
1. Main | 2. Restrictions | 3. Items | 4. Quantity | **5. Transactions** | 6. Allocations

Item	Description	Type	Ref No.	Lot Serial No.	Quantity
1001-HON-H252	HON 2 DRAWER LETTER FLE W/D LK	Repl To	00000011		100.00
2480-8-50	DESK FILE 8" CAP 50	Repl To	00000011	JAN10	100.00
4886-18-14-3	PAPER CADDY 18"W 14"D 3"H	Repl To	00000011		94.00

Buttons: Copy..., Transfer..., Accept, Cancel, Delete, Print, Help

Item Bin Maintenance

The Item Bin Maintenance task is used to define item specific bin settings and defaults (such as default receiving, picking and overstock locations) as well as view item bin information in the “Quantity”, “Transactions”, and “Allocations” tabs. This task may be accessed from the Multi-Bin menu in Sage 100 or from the “More...” button in Item Maintenance/Inquiry.



The Default Bin Location features are only available in the Multi-Bin Advanced Product. For more information, see [Multi-Bin Advanced Features](#) in the Multi-Bin Advanced Features section.

Quick Bin Transfers

Quick Bin Transfers are available in several screens within the Multi-Bin module and they provide a quick and easy way to transfer items from one bin location to another, without having to make an inventory transaction.

Note: The option to allow Quick Bin Transfers must be enabled in Multi-Bin Options in order to use this feature.

Quick Bin Transfers may be performed in Bin Location maintenance either by selecting the “Transfer” button at the top of the screen or by selecting a line on the Quantity tab and selecting the transfer button to the right.

Warehouse Code: 000 CENTRAL WAREHOUSE
Bin Location: A-100-20
Description: Default Bin

1. Main | 2. Restrictions | 3. Items | 4. Quantity | 5. Transactions | 6. Allocations

Item	Description	On Hand	PO Receipts	PO Returns	PO Mat Req	IM Transa
1001-HON-H252	HON 2 DRAWER LETT...	.00	.00	.00	.00	.00
2480-8-50	DESK FILE 8" CAP 50	.00	.00	.00	.00	.00
2481-5-50	DESK FILE 5 1/4" CAP 50	.00	.00	.00	.00	.00
8971	UNIVERSAL 5 1/4" SS...	.00	.00	.00	.00	.00
GLOB-V-3672-25W	GLOBE FOLDING TABL...	.00	.00	.00	.00	.00
PFS-007-CABLE	EIA RS232 CABLE 7 CO...	12,000.25	.00	.00	.00	.00
SPEAKERS	SPEAKERS	.00	.00	.00	.00	.00
WJ-M-2109-A	POST BINDER 3/16X1...	.00	.00	.00	.00	.00

On Hand: 12,000.25
On PO Rcpts: .00
On PO Rtns: .00
On PO MR: .00
On IM Trans: .00
On SO/IM Sls: .00
On Repl From: .00

Item: Show Zero Quantities: ☐

Buttons: Accept, Cancel, Delete, Print, Help

Callout 1: Transfer all available items in this bin to another location (points to Transfer... button)

Callout 2: Transfer all available quantities for single item to another location (points to transfer icon in table margin)

When transferring all items in the bin location, a window will appear allowing the user to select the To Bin Location. Once a To Bin Location is chosen and the “OK” button is selected, the items will immediately be transferred to their destination bin.

Transfer

Warehouse Code: 000
From Bin Location: A-100-20
Available Quantity: 12,000.25

To Bin Location:

Buttons: OK, Cancel, Help

When transferring a single item, a window will appear allowing you to choose both the To Bin Location and the Transfer Quantity.

The screenshot shows a 'Transfer' dialog box with the following fields:

- Item Code: PFS-007-CABLE
- Warehouse Code: 000
- From Bin Location: A-100-20
- Available Quantity: 12,000.25
- To Bin Location: (empty field with a search icon)
- Transfer Quantity: .00

Buttons at the bottom: OK, Cancel, and a green help icon.

When transferring single items which are Lot/Serial items, the transfer will function differently based on the view selected in Bin Location Maintenance.

If the Bin Location Maintenance view on the Quantity Tab is set to “Item”, the transfer will transfer all serial numbers which are available to another bin location.

The screenshot shows the 'Bin Location Maintenance (ABC) 7/21/2016' window. The 'Quantity' tab is selected, showing a table with columns: Item, Description, On Hand, PO Receipts, PO Returns, PO Mat Req, and IM Trans. The item 'GB-MD750' is selected, with a description 'MODEM 9600 (SYNCHR...' and an on-hand quantity of 15.00.

The 'Transfer' dialog box is open, showing the following fields:

- Item Code: GB-MD750
- Warehouse Code: 000
- From Bin Location: B-100-30
- Available Quantity: 15.00
- To Bin Location: (empty field with a search icon)
- Transfer Quantity: 15.00

Buttons at the bottom of the dialog: OK, Cancel, and a green help icon.

In the background window, the 'View' dropdown menu is set to 'Item', which is circled in red. The 'Show Zero Quantities' checkbox is also visible.

If the view is set to “Lot/Serial” and transfer is selected, then an individual Lot/Serial Number will be transferred.

sage * Bin Location Maintenance (ABC) 7/21/2016

Warehouse Code: 000 CENTRAL WAREHOUSE

Bin Location: B-100-30

Description: Default Bin

Copy... Transfer...

1. Main | 2. Restrictions | 3. Items | 4. Quantity | 5. Transactions | 6. Allocations

Item	Lot/Serial	On Hand	PO Receipts	PO Returns	PO Mat Req	IM Tra
GB-MD750	11	1.00	.00	.00	.00	
GB-MD750	123	1.00	.00	.00	.00	
GB-MD750						
GB-MD750						
GB-MD750						
GB-MD750						
GB-MD750						
GB-MD750						
GB-MD750						
GB-MD750						
GB-MD750						
GB-MD750						
GB-MD750						
GB-MD750						
GB-MD750						
Totals		15.00				

Lot / Serial Show Zero Quantities ☐

Accept Cancel Delete Print ?

sage Transfer

Item Code: GB-MD750 Lot/Serial No: 11

Warehouse Code: 000

From Bin Location: B-100-30

Available Quantity: 1.00

To Bin Location:

Transfer Quantity: .00

OK Cancel ?

The Quick Bin functionality is also available in Item Bin Maintenance on the Quantity Tab as well as functions in the same manner as in Bin Location Maintenance.

Reports Menu

Item Listing

Print the “Item Listing” from the Multi-Bin Inventory Management Reports menu to print a listing of each item code and bin related information. This report may also be accessed from the Multi-Bin Item Maintenance task.

Item Listing				
ABC Distribution and Service Corp. (ABC)				
Item Code	Description	Warehouse	Description	Disable Multi-Bin
1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	000	CENTRAL WAREHOUSE	No
Default Receiving Bin Location 1: E-300-10 Default Picking Bin Location 1: E-300-10 Default Overstock Bin Location: OVERSTOCK Last Received Date: 4/24/2016 Last Received Bin Location: A-100-00 Last Issued Date: Last Sold Date: Last Counted Date:				
Last Received By: DSD Last Issued By: Last Sold By: Last Counted By:				
Overstock/Overflow Location Last Received Quantity: 500.00 Last Issued Quantity: 0.00 Last Sold Quantity: 0.00 Last Counted Quantity: 0.00				

Bin Location Listing

Print the “Bin Location Listing” from the Multi-Bin Inventory Management Reports menu to print a listing of each bin location and associated settings. This report may also be accessed from the Bin Location Maintenance task.

Bin Location Listing				
ABC Distribution and Service Corp. (ABC)				
Bin Location	Description	Warehouse Code	Description	
A-100-00		000	CENTRAL WAREHOUSE	
Location Type:				
Active: Yes				
Segment 1:	Name: Aisle	Setting: A	Sort:	
Segment 2:	Name: Rack	Setting: 100	Sort:	
Segment 3:	Name: Bin	Setting: 00	Sort:	
Segment 4:	Name:	Setting:	Sort:	
Segment 5:	Name:	Setting:	Sort:	
Item Restriction: None				
Customer Restriction: None				
Replenishment: No				
Minimum Quantity: 0.00				
Maximum Quantity: 0.00				
Disallow IM Receipts: No				
Disallow IM Transfer From: No				
Disallow IM Issues: No				
Disallow IM Transfer To: No				
Disallow PO Receipts: No				
Disallow PO Returns: No				
Disallow PO Material Requisition: No				
Disallow SO Shipping: No				
Disallow BM Production: No				
Disallow BM Disassembly: No				
Quantity On Hand: 528.00				
Last Received Date:	4/24/201	Last Received By: DSD	Last Received Quantity:	500.00
Last Received Item:	1001-HON-H252	HON 2 DRAWER LETTER FLE W/O		

Bin Location Stock Status Report

Use the “Bin Location Stock Status Report” to print current quantity on hand information. This report may be sorted by Item Code or by Bin Location.

Bin Location Stock Status Report Sorted by Item Code							
							(AB1)
Warehouse: 000 CENTRAL WAREHOUSE							
Item Code / Description							
Bin Location	Quantity						
	On Hand	On PO	On IM	On SO/IM Sales	On BM	On WO	Available
1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK							
			Product Line	WF&A	U/M	EACH	
A-000-00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
E-300-10	2,675.00	0.00	0.00	0.00	0.00	0.00	2,675.00
Item 1001-HON-H252 Total:	2,675.00	0.00	0.00	0.00	0.00	0.00	2,675.00
1001-HON-H252LK HON 2 DRAWER LETTER FLE W/ LCK							
			Product Line	WF&A	U/M	EACH	
E-300-20	73.00	0.00	0.00	0.00	0.00	0.00	73.00
Item 1001-HON-H252LK Total:	73.00	0.00	0.00	0.00	0.00	0.00	73.00
1001-HON-H254 HON 4 DRAWER LETTER FLE W/O LK							
			Product Line	WF&A	U/M	EACH	
E-300-30	86.00	0.00	0.00	0.00	0.00	0.00	86.00
Item 1001-HON-H254 Total:	86.00	0.00	0.00	0.00	0.00	0.00	86.00
1001-HON-H254LK HON 4 DRAWER LETTER FLE W/ LCK							
			Product Line	WF&A	U/M	EACH	
E-300-40	52.00	0.00	0.00	0.00	0.00	0.00	52.00
Item 1001-HON-H254LK Total:	52.00	0.00	0.00	0.00	0.00	0.00	52.00

Bin Location Allocation Report

Print the “Bin Location Allocation Report” to print current allocations for items. This report may be sorted by Item Code or by Bin Location.

Bin Location Allocation Report
Sorted by Item Code

ABC Distribution and Service Corp. (ABC)

Warehouse: 001 EAST WAREHOUSE

Item Code / Description

Bin Location	Transaction Type	Reference No	Transaction Quantity	
1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK		Product Line W/F&A	U/M	EACH
E-300-10	SO Sales Order	0000156	2.00	
E-300-10	SO Sales Order	0000171	1.00	
E-300-10	SO Sales Order	0000174	1.00	
Item 1001-HON-H252 Total:			4.00	
1001-HON-H254LK HON 4 DRAWER LETTER FLE W/ LCK		Product Line W/F&A	U/M	EACH
E-300-40	SO Sales Order	0000116	3.00	
Item 1001-HON-H254LK Total:			3.00	
6650-26-16-11 SOUND CVR 26"W 16"D 11"H DM		Product Line PS&A	U/M	EACH
D-300-20	SO Sales Order	0000157	3.00	
D-300-20	SO Sales Order	0000164	1.00	
Item 6650-26-16-11 Total:			4.00	
6655 PRINTER STAND W/ BASKET		Product Line PS&A	U/M	EACH
D-100-10	SO Sales Order	0000162	3.00	
Item 6655 Total:			3.00	

Bin Location Transaction History Report

Print the "Bin Location Allocation Report" from the Multi-Bin Inventory Management Reports menu to print historical transactions for bin locations. This report may be sorted by Item Code or by Bin Location.

Bin Location Transaction History Report
Sorted by Bin Location

ABC Distribution and Service Corp. (ABC)

Warehouse: 000 CENTRAL WAREHOUSE

Bin Location / Description

Item Code	Description	Type	Date	Reference No	Transaction Quantity
A-100-00	Location Type				
1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	IR	04/24/2016	00000013	500.00
D1400	EXECUTIVE DESK ENSEMBLE	BB	04/24/2016	BEGINTRANS	7.00
D1700	SECRETARY DESK ENSEMBLE	BB	04/24/2016	BEGINTRANS	21.00

Utilities Menu

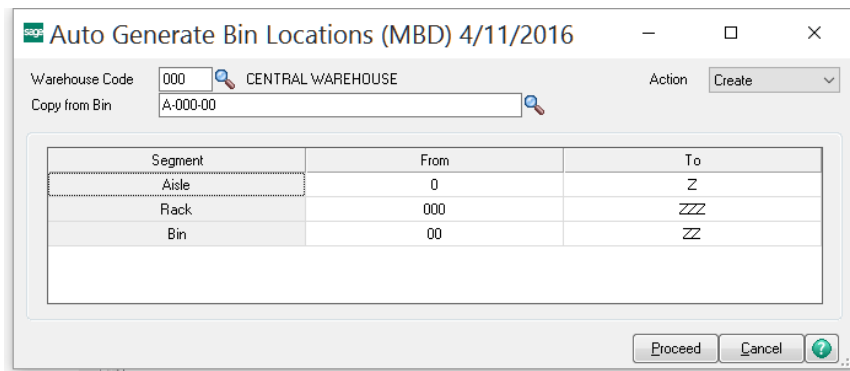
Auto Generate Bin Locations

The Auto Generate Bin Locations utility can be used to generate multiple bin locations at one time or to delete multiple bin locations. Segments must be defined in Segment Code Maintenance prior to running this task. **Note:** If the “Copy From” Bin Location has a description which contains the Bin Location Number, any bin locations created from this bin location will have a new description generated with the new bin location number.

Segment From/To: Select the range of segments which will be used to create/delete the bin locations.

Copy from Bin: This field is required when generating new bin locations. All bin locations generated using this utility will use the “Copy from Bin” as a default for the bin location settings.

Action: Select from Create or Delete to either create a range of bin locations or delete a range of bin locations.



Segment	From	To
Aisle	0	Z
Rack	000	ZZZ
Bin	00	ZZ

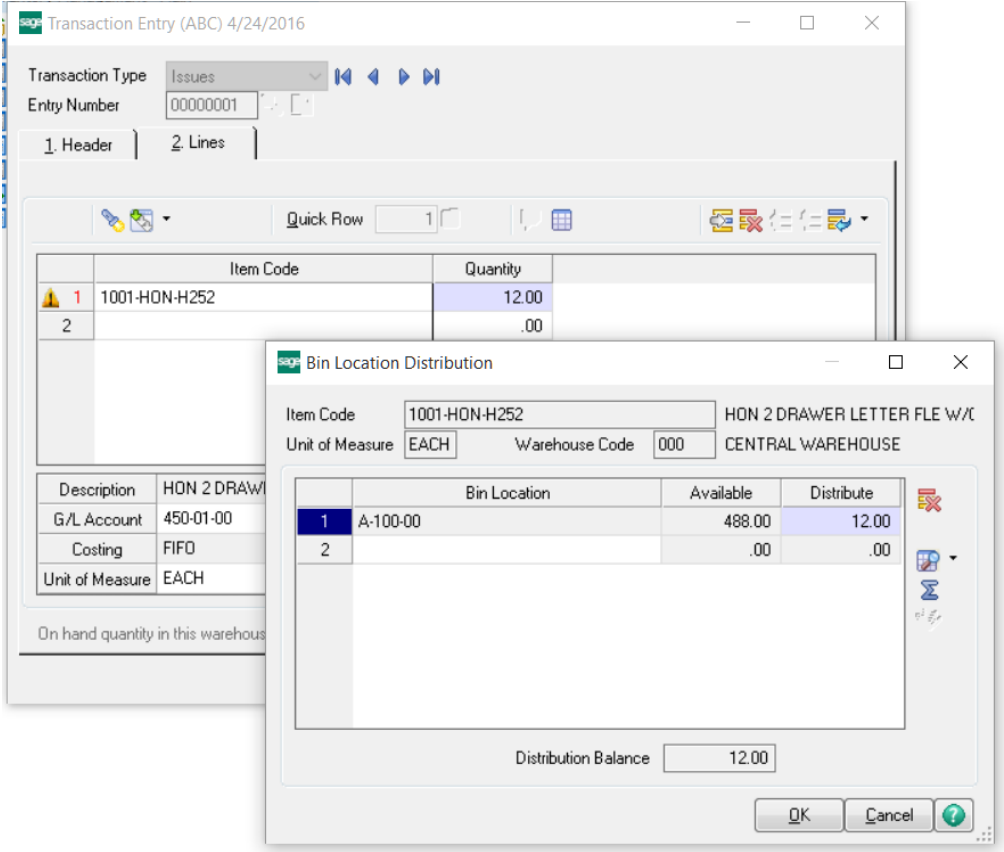
Section F: Inventory Management

Transaction Entry

Inventory Management Transaction Entry has been modified to allow for Bin Location distribution. When entering inventory transactions for items in which the item and warehouse have been enabled for multi-bin distributions, the Bin Location Distribution screen will appear. For transactions which require a lot/serial number, the user will be required to select a lot/serial number as well as the bin location. Item transactions (such as inventory adjustments) for FIFO/LIFO items will require the inventory tier in addition to the bin location.

Bin locations may be maintained for a line by selecting the Bin Location Distribution icon above the data entry grid.

With Multi-Bin Inventory Management, users now also have the ability to enter inventory transfers where the “From” warehouse and “To” warehouse are the same.



Physical Count Worksheet

The Physical Count Worksheet has been modified to include additional options for Multi-Bin Inventory Management. A dropdown option has been added to this task to allow for selection of “All Items”, “Multi-Bin Items Only” or “Single-Bin Items Only”. Additional selection parameters have also been added to the “Selections” grid to print the worksheet for “MB Bin Location” and/or “MB Bin Location Type”.

Physical Count Entry

Physical Count Entry has been modified to include bin distribution for items in which multi-bin has been enabled. To add a new bin location entry in Physical Count for a frozen inventory item, select the “Add New Bin Location” button above the data entry grid.

Count Card Entry

The Inventory Management Count Card Entry has been modified to allow the selection of a Multi-Bin Location. The Multi-Bin Location is required if Multi-Bin is enabled for this item.

The Count Card Variance Register has also been modified to include additional selection parameters for Multi-Bin Items.

Count Card Entry (MBD) 4/11/2016

Count Card Number: 0000000001

Quick Row: 2

	Warehouse	Item Code	Multi Bin Location	Lot/Serial No.	Quantity Counted
1	000	1001-HON-H252	A-000-00		10.00
2	000	000			.00

Description: Count Card Comment, /M Used for Count: Standard, Bin Location

Missing Count Card Listing...

Accept Cancel Delete

Count Card Variance Register

Sort Lines By: Item Code Multi-Bin: All Items

Product Types: All Types ☒ Finished Goods ☒ Raw Materials ☒ Discontinued ☒ Kits ☒

Procurement Types: All Types ☒ Make ☒ Buy ☒ Subcontract ☒

Selections

Select Field	Operand	Value
Item Code	All	
Bin Location	All	
Item Description	All	
Warehouse	All	
Inventory Cycle	All	
Product Line	All	
MB Bin Location	All	

HP ENVY 120 series Class Driver

Print Preview Setup

Section G: Purchase Order

Receipt of Goods Entry, Return of Goods Entry and Material Requisition Issue Entry

Receipt of Goods Entry, Return of Goods Entry and Material Requisition Entry have been modified to allow for Bin Location Distribution. The Bin Location distribution can be manually entered in each of these tasks or automatically with Multi-Bin Advanced is installed. (For more information see [Multi-Bin Advanced Features](#).) Select the Bin Distribution button above the data entry grid to enter in bin allocations. The bin location is required if multi-bin has been enabled for the item.

The screenshot shows the 'Receipt of Goods Entry (MBD) 4/11/2016' window. The 'Receipt Number' is 001013. The 'Quick Row' is 1. The 'Bin Location Distribution' dialog box is open, showing the 'Item Code' 1001-HON-H252, 'Unit of Measure' EACH, and 'Warehouse Code' 000. The dialog box contains a table for bin locations:

Bin Location	Available	Distribute
1 A-200-70	.00	1.00
2	.00	.00

The 'Distribution Balance' is 1.00. The 'OK' button is highlighted.

The background window shows a table with the following data:

Item Code	Ordered	Received	Unit Cost	Extension	Comm
1 1001-HON-H252	1.00	1.00	31.113	31.11	
2 /C	.00				
3	.00				

The 'Description' is HON 2 DRAWER LETTER FLE W/D LK. The 'Warehouse' is 000. The 'Unit of Measure' is EACH. The 'Back Ordered' is .00.

Section H: Sales Order

Sales Order Entry

Sales Order Entry has been modified to allow for Bin Location Distribution of items. **Note:** This option is only available if “Allow Bin Distribution in Sales Order Entry” has been enabled in Multi-Bin Inventory Management Options and “Allow Lot/Serial Distribution” has been enabled in Sales Order Options. Allocations can be made either manually (by selecting the Bin Location Distribution button above the lines grid) or automatically when Multi-Bin Advanced is installed. For more information see [Multi-Bin Advanced Features](#).

Sales Order Entry (MBD) 4/11/2016

Order Number: 0000178

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card | User: DSD

	Item Code	Ordered	Back
1	1001-HON-H252	1.00	
2	2480-8-50	12.00	
3	2480-8-50	1.00	
4		.00	

Bin Location Distribution

Item Code: 1001-HON-H252 HON 2 DRAWER LETTER FLE W/X
Unit of Measure: EACH Warehouse Code: 000 CENTRAL WAREHOUSE

	Bin Location	Available	Distribute
1	F-300-09	99.00	1.00
2		.00	.00

Distribution Balance: .00

OK Cancel

(Average Cost = 34.250) Profit Margin % = 59

Total Amount: 509.00

Print Order... Print Pick... Recalc Price Accept Cancel Delete

If Bin Distributions are enabled in Sales Order Entry the bin distribution window will automatically display each time a Sales Order is entered. If an incomplete distribution is made a message will appear.

Sage 100 ERP

? This distribution is out of balance. Do you want to delete this line?

Yes No

This message box may be bypassed and the automatic display of the bin distribution window may also be disabled by enabling the option in Multi-Bin options. For more information see [Multi-Bin Options](#).

Invoice Data Entry and Shipping Data Entry

Sales Order Invoice Data Entry and Shipping Data Entry has been modified to allow for Bin Location Distribution of items. Allocations can be made either manually (by selecting the Bin Location Distribution button above the lines grid) or automatically or automatically when Multi-Bin Advanced is installed. For more information, see [Multi-Bin Advanced Features](#).

If the multi-bin bin location was previously allocated on the Sales Order either during Sales Order Entry or Picking Sheet Printing, those allocations will carry through to the S/O Invoice. For more information on auto-allocation settings see [Warehouse Bin Maintenance](#).

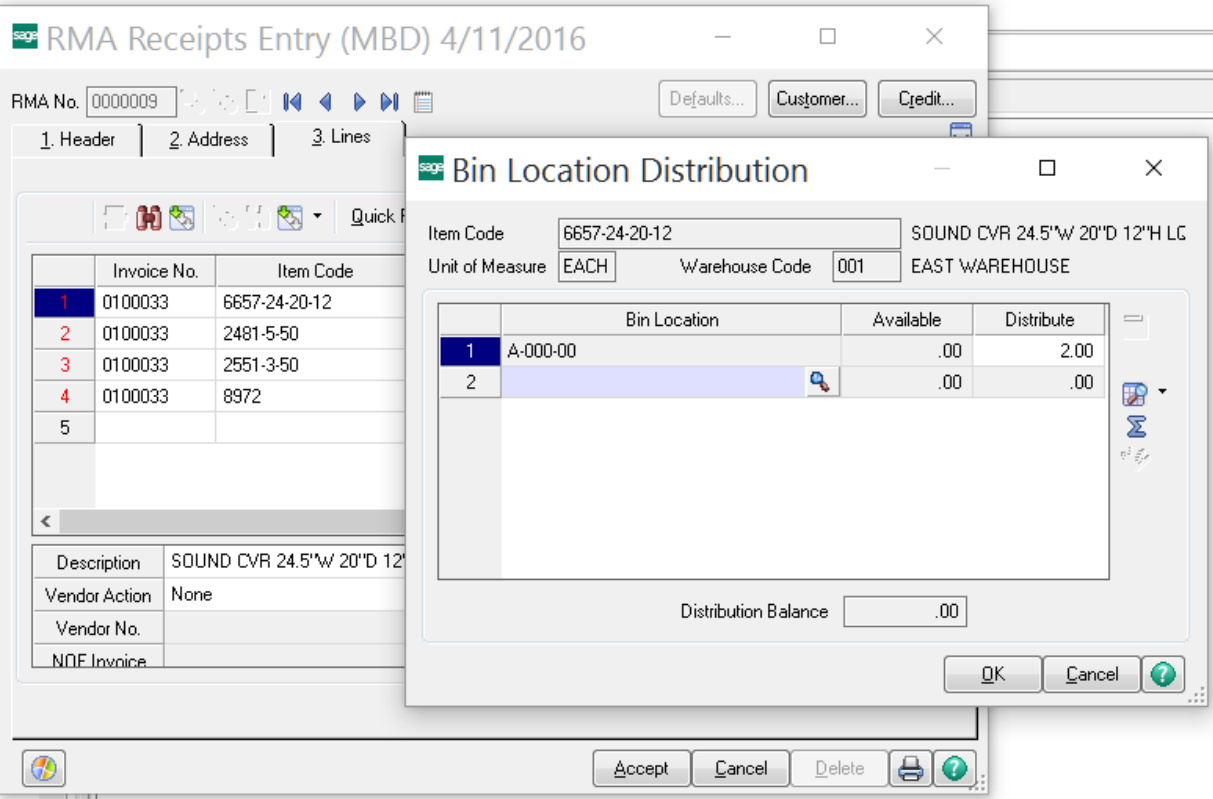
The screenshot shows the 'S/O Invoice Data Entry (MBD) 4/11/2016' window. The 'Lines' tab is active, showing a table with columns: Item Code, Ordered, Shipped, and Unit Price. The first line (1) has Item Code 1001-HON-H252, Ordered 12.00, Shipped 12.00, and Unit Price 78.12. The second line (2) has Item Code 1001-HON-H252, Ordered .00, Shipped .00, and Unit Price .00. Below the table, the 'Description' is 'HON 2 DRAWER LETTER FLE W/O LK', 'Warehouse' is '000', 'Unit Of Measure' is 'EACH', and 'Back Ordered' is .00. The 'Total Amount' is 937.44. The 'Bin Location Distribution' dialog box is open, showing the same Item Code and Unit of Measure. It has a table with columns: Bin Location, Available, and Distribute. The first row (1) has Bin Location A-000-00, Available 38.00, and Distribute 12.00. The second row (2) has Bin Location A-000-00, Available .00, and Distribute .00. The 'Distribution Balance' is 12.00. The dialog box has 'OK', 'Cancel', and a help icon button.

Note: The “Do you wish to ship the complete sales order?” message that is displayed during Shipping/Invoice Entry will function differently depending on the settings defined in Multi-Bin Options. For more information, see [Multi-Bin Options](#).

Section I: Return Merchandise Authorization

RMA Receipts Entry

RMA Receipts Entry has been modified to allow for Bin Location Distribution of items. Allocations can be made either manually (by selecting the Bin Location Distribution button above the lines grid) or automatically based on the allocation settings when Multi-Bin Advanced is installed. For more information, see [Multi-Bin Advanced Features](#).



Section J: Bill of Materials

Production and Disassembly Entry

Bill of Materials Production Entry and Disassembly Entry have been modified to allow for Bin Location Distribution and Lot Serial/Distribution on both the Parent and Component Items. Parent Allocations can be made either manually (by selecting the Distribute button on the Header) or automatically based on the allocation settings based on the allocation settings when Multi-Bin Advanced is installed. For more information, see [Multi-Bin Advanced Features](#).

Also added is the ability to assign multiple unique Lot/Serial Numbers at the Parent level. Standard Sage 100 only allows for one Lot Number or one starting Serial Number(range) for each Production or Disassembly Entry Parent Item. Distribution of Lot/Serial Numbers as well as bins is also available for component items as well.

The screenshot shows two overlapping windows from the Sage 100 software. The background window is titled "Production Entry (ABC) 7/22/2016". It contains fields for Production Number (0000004), Production Date (7/22/2016), Bill Number (2480-8-50), Bill Type (Standard), Quantity (10.00), Unit of Measure, Effective Date (7/22/2016), Parent Warehouse (000), Component Warehouse (000), and an Explode Sub-Assemblies checkbox. The foreground window is titled "Lot/Serial Number / Bin Location Distribution". It contains fields for Item Code (2480-8-50), Unit of Measure, Warehouse Code (000), and a description (DESK FILE 8" CAP 50, CENTRAL WAREHOUSE). It features a table with the following data:

	Bin Location	Lot Number	Available	Distribute
1	A-000-00	123456	.00	1.00
2	A-000-20	1234578	.00	1.00
3	A-000-60	111	.00	8.00
4			.00	.00

At the bottom of the foreground window, there are fields for Distribution Order (Bin Location First), Default to Prior Row (unchecked), Distribution Balance (.00), and buttons for OK, Cancel, and a help icon.






Section K: Production Management


Work Ticket Transaction Entry – Material Issue








Work Ticket Transaction Entry for Material Issues has been enhanced to allow Bin Location Distribution and Lot Serial/Distribution for Component Items. Allocations can be either made manually (by selecting the Lot/Serial/Bin Distribution button) or automatically based on the allocation settings in Warehouse Bin Maintenance.

If Auto-Allocations are enabled, these allocations will also occur for auto-generated backflush and auto-issued material issues.

S Work Ticket Transaction Entry (PMZ) 7/29/2022

Transaction No.     


1. Header 2. Lines 

Quick Row       


	Item Code	Step No.	Required	Issued	Comment
4	VGABW-04692	000090	.00	.00	
5	VGAIL-42964	000020	.00	.00	
6	KEYBD-00102	000090	.00	.00	
7	/C	000000	.00	.00	DEFECTIVE PARTS TO SALLY IN ENGINEERING
8	/C	000000	.00	.00	REWORK AND ADDITIONAL BURN-IN.
9	BOARD-004230-33	000000	1.00	1.00	

S Lot/Serial Number / Bin Location Distribution

Item Code 80486DX4 MOTHERBOARD 100MHZ
 Unit of Measure Warehouse Code MAIN WAREHOUSE

	Bin Location	Serial Number	Available	Distribute
1	0	1000302	.00	1.00
2			.00	.00

Distribution Order Default to Prior Row ☐ Distribution Balance

OK Cancel 

Work Ticket Transaction Entry – Completion

Work Ticket Transaction Entry for Completions has been enhanced to allow Bin Location Distribution and Lot Serial/Distribution for Completion (Parent) Items. Allocations can be made either manually (by selecting the Distribute button) or automatically based on the allocation settings in Warehouse Bin Maintenance.

Note: Standard Sage 100 only allows for completions to one Lot Number or one starting Serial Number. MBAD has enhanced the Completion distribution so that items can be completed to multiple Lot/Serial Number and Bins.

Work Ticket Transaction Entry (PMZ) 7/29/2022

Transaction No. 0000019

1. Header 2. Lines

Work Ticket No.	Description	Cost Method	Quantity
1 000000095027	TURBO DESKTOP COMPUTER SYSTEM	Actual	1.00
2			.00

Bin Location Distribution

Item Code DSKTP-00200 TURBO DESKTOP COMPUTER SYST

Unit of Measure EACH Warehouse Code 000

	Bin Location	Available	Distribute
1	0	63.00	1.00
2		.00	.00

Distribution Balance 1.00

OK Cancel ? Cancel Delete ?

Work Ticket Entry – Dynamic Inventory

Work Ticket Entry has been enhanced to allow Bin Location Distribution and Lot Serial/Distribution for Component Items when Dynamic Materials has been Enabled in Production Management Options. Allocations are done manually by selecting the Lot/Serial/Bin Distribution button.

S Work Ticket Entry (PMZ) 7/29/2022

Work Ticket No. 000000095010

Copy From... Defaults... Attachments...

1. Header 2. Steps 3. Materials 4. Inquiry 5. Schedule 6. Totals User dsd

	Item Code	Step No.	Required	Issued	Comment
4	MEMRY-00080	000010	32.00	32.00	
5	VGAII-42964	000020	16.00	.00	
6	DDCAB-01002	000040	16.00	.00	

S Lot/Serial Number / Bin Location Distribution

Item Code MEMRY-00080 MEMORY CHIP SET - 4 MEG

Unit of Measure EACH Warehouse Code 000 MAIN WAREHOUSE

	Bin Location	Lot Number	Available	Distribute
1	0	050105	441.00	32.00
2			.00	.00

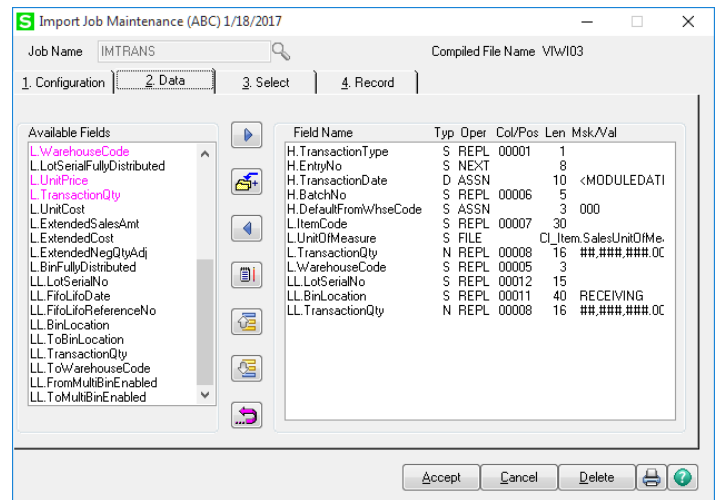
Distribution Order Bin Location First Default to Prior Row ☐ Distribution Balance .00

OK Cancel ?

Section L: Visual Integrator & Custom Reporting

The following section contains information on the Multi-Bin Tables commonly used for importing through visual integrator as well as tables commonly used with custom reporting.

- **Bin Locations**
 - Table: MB_BinLocation
 - Required Fields: WarehouseCode,BinLocation
 - Note: Minimum/Maximum Bin Quantities are available in this table. These min/max fields are for the entire bin regardless of the item. If there are specific min/max values that are determined by both item and bin location, MB_BinItemMinMax should be used.
- **Physical Counts**
 - Table: IM_Physical
 - Required Fields: WarehouseCode,ItemCode
 - The BinLocation field is also required if Multi-bin is enabled for that item.
 - Note: You must **Freeze** the inventory before importing into Physical Count Entry
- **Item Min/Max by Bin Location**
 - Table:MB_BinItemMinMax
 - Required Fields: WarehouseCode,BinLocation,ItemCode
 - Note: This table is for specific min/max values by item and bin. If the Min/Max is determined by only the bin location, MB_BinLocation should be used.
- **Inventory Transactions**
 - Table: IM_TransactionHeader
 - Select the IM_TransactionHeader table to import Inventory Transactions
 - When the Job is created for IM_TransactionHeader, Multi-Bin information is imported into the “LL” fields.



- **Sales Order Invoices**
 - Table: SO_InvoiceHeader
 - Select the SO_InvoiceHeader table to import invoices.
 - When the Job is created for SO_InvoiceHeader, Multi-Bin information is imported into the "LL" fields.

Field Name	Typ	Oper	Col/Pos	Len	Msk/Val
H.InvoiceNo	S	NEXT		7	
H.SalesOrderNo	S	REPL	00002	7	
H.InvoiceDate	D	REPL	00003	10	M/D/Y
H.ARDivisionNo	S	REPL	00010	2	00
H.CustomerNo	S	REPL	00011	20	
L.ItemCode	S	REPL	00004	30	
L.UnitOfMeasure	S	FILE			Cl_Item.SalesUnitOfMe.
L.WarehouseCode	S	ASSN		3	001
L.QuantityOrdered	N	REPL	00005	16	##,###,###.0C
L.QuantityShipped	N	REPL	00005	16	##,###,###.0C
LL.LotSerialNo	S	REPL	00008	15	
LL.BinLocation	S	REPL	00007	40	
LL.QuantityShipped	N	REPL	00005	16	##,###,###.0C

- **P/O Receipt of Goods**
 - Table: PO_ReceiptHeader
 - Select the PO_ReceiptHeader table to import Receipt of Goods entries.
 - When the Job is created for PO_ReceiptHeader, Multi-Bin information is imported into the "LL" fields.

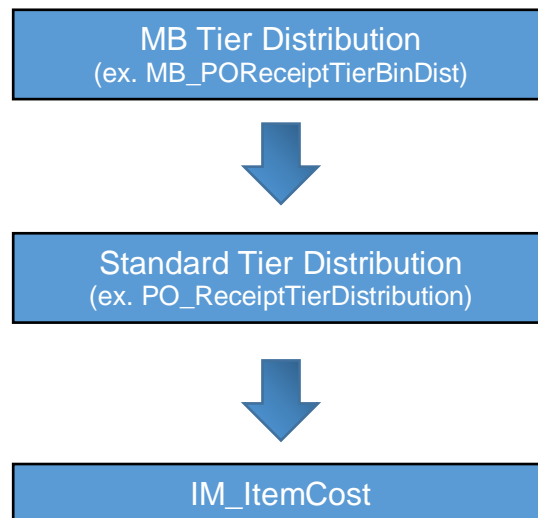
Field Name	Typ	Oper	Col/Pos	Len	Msk/Val
H.ReceiptType	S	ASSN		1	G
H.ReceiptNo	S	NEXT		6	
H.ReceiptDate	D	REPL	00001	10	M/D/Y
H.PurchaseOrderNo	S	REPL	00002	7	
L.OrderLineKey	S	REPL	00007	6	000000
L.ItemCode	S	REPL	00003	30	
L.WarehouseCode	S	REPL	00008	3	
L.QuantityReceived	N	REPL	00004	16	##,###,###.0C
LL.LotSerialNo	S	REPL	00006	15	
LL.BinLocation	S	REPL	00005	40	
LL.QuantityReceived	N	REPL	00009	16	##,###,###.0C

Tables Commonly Used in Reporting

- **For reporting Multi-Bin On-Hand & Allocated Quantity information**
 - Table: MB_BinItem
- **For reporting Multi-Bin Transaction History Information**
 - Tables: MB_BinTransactionHistory, MB_LotSerialTransactionHistory

Section M: Custom Office & Customizer

User Defined Fields (UDF's) can be added to the system to further customize use of the DSD / ScanForce Multi-Bin Module. In Standard Sage 100, when you add a lot/serial UDF, the field would be added to the data entry Tier Distribution table (ex: PO_ReceiptTierDistribution) then map the UDF to the IM_ItemCost file. With Multi-Bin installed, there is an added step. Fields must first be added to the Multi-Bin Tier Distribution table, then to the standard tier distribution table, then to the IM_ItemCost file.



For example, if adding a lot/serial expiration date, you would first add a UDF to MB_POReceiptTierBinDist as a 'Manual' entry date field with no data sources. Next, the field would need to be added to the PO_ReceiptTierDistribution table. When adding the field to the PO_ReceiptTierDistribution table, you will first select to add the field as a manual entry, then select 'Date Field' on the Attributes tab. On the Data Sources tab, you must select the 'Copy From Bin Distribution' Business Object, select the Multi-Bin Tier Distribution Data Source, then select the appropriate field.

PO_ReceiptTierDistribution : Add Field

Field Name:
 Description:
 Source for UDF Data:
 Source: ☒ Manual Entry ☐ Business Object

PO Receipt Tier Distribution : Add Field

Field Name:
 Description:
 Control Type: ☒ Multi-Line ☐ Drop-Box ☐ List-Box ☐ Check-Box

1. Attributes 2. Validation 3. Data Sources

Business Object	Select	Data Source	Column	Ignore	Expression
PO_ReceiptTierDistribution_bus	<input type="checkbox"/>			<input type="checkbox"/>	
PO_ReceiptTierDistribution_bus.CopyFromBinDistribution	<input checked="" type="checkbox"/>	MB_POReceiptTierBinDist	UDF_EXPIRE_DATE	<input type="checkbox"/>	

Field in Use..... No
 Bytes Used..... 109 of 20,000
 Name Space Used..... 130
 Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names.

OK Cancel ?

When adding the field to the IM_ItemCost table the process will be the same, however the Business Object will be the PO_ReceiptRegister_upd and the Data Source will be the PO_ReceiptTierBinDistribution.

This process can be followed for any Data Entry Tasks in which the UDF is needed.

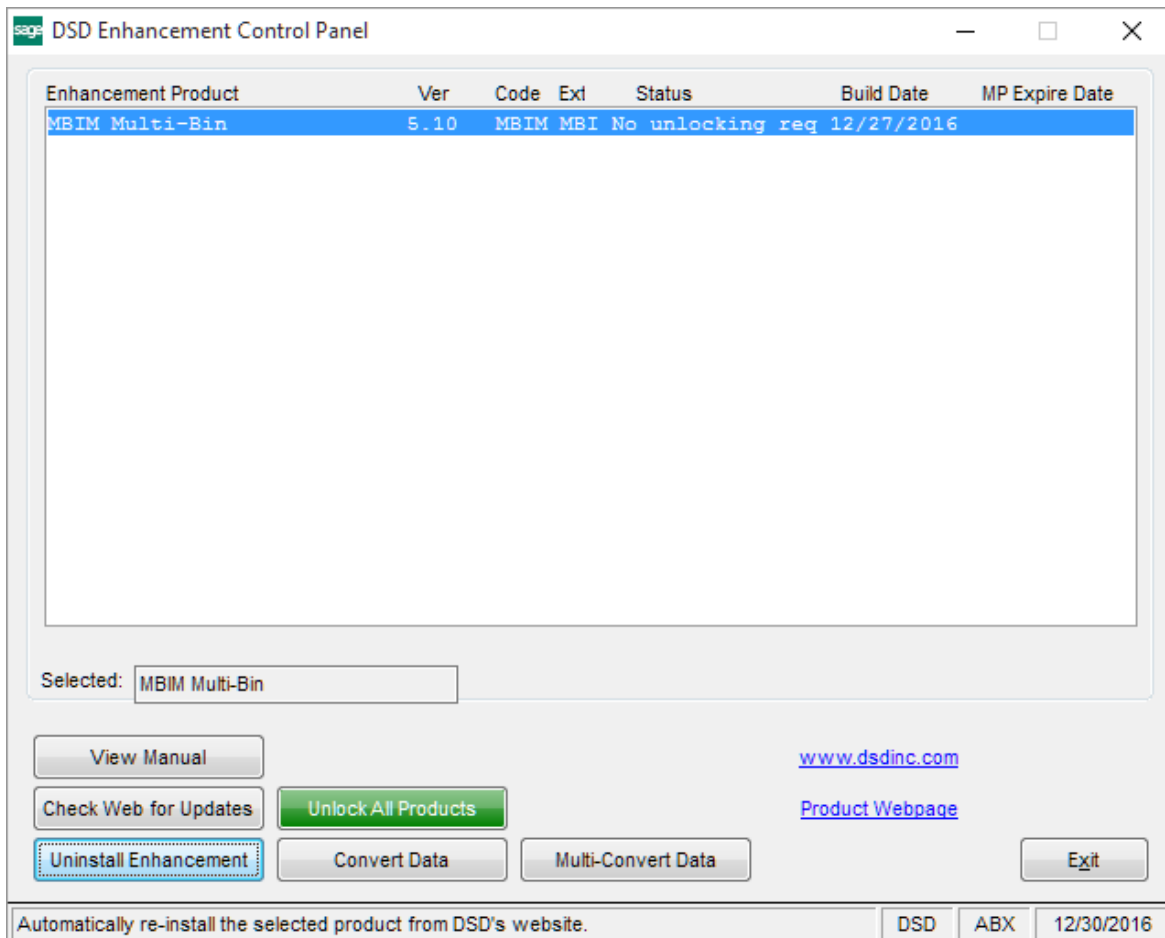
Business Object	Select	Data Source	Column	Ignore	Expression	DM
IM_ItemCost_bus	<input type="checkbox"/>					
IM_TransactionRegister_upd	<input type="checkbox"/>					
PO_ReceiptRegister_upd	<input checked="" type="checkbox"/>	PO_ReceiptTierDistribution	UDF_EXPIRE_DATE	<input type="checkbox"/>		
BM_ProductionRegister_upd	<input type="checkbox"/>					
BM_DisassemblyRegister_upd	<input type="checkbox"/>					
SO_SalesJournal_upd	<input type="checkbox"/>					
IM_PhysicalCountVarRegister_upd	<input type="checkbox"/>					

When adding the fields panels in Customizer Selection, you will select the Multi-Bin 'Lot/Serial Number / Bin Location Distribution' from Common Entry under the DSD / ScanForce Multi-Bin folder.

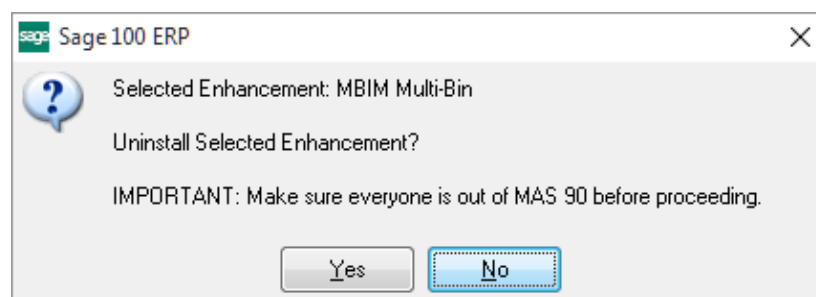
In the panel, right-click the grid, then select the appropriate business object. You can then add the desired UDF to the grid and save.

Section N: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.



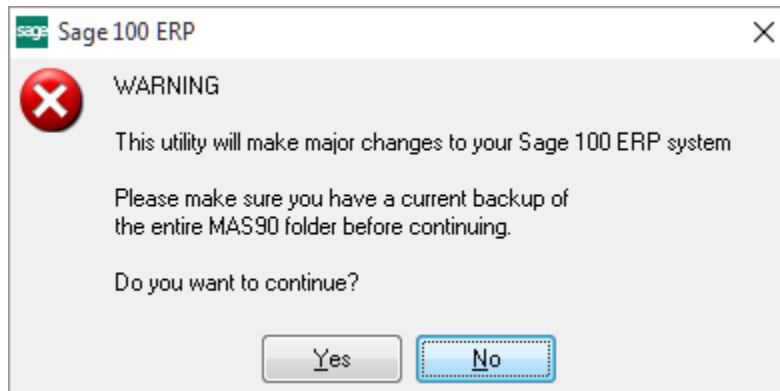
When accessing the **DSD Enhancement Control Panel**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process.

The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.



Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process.

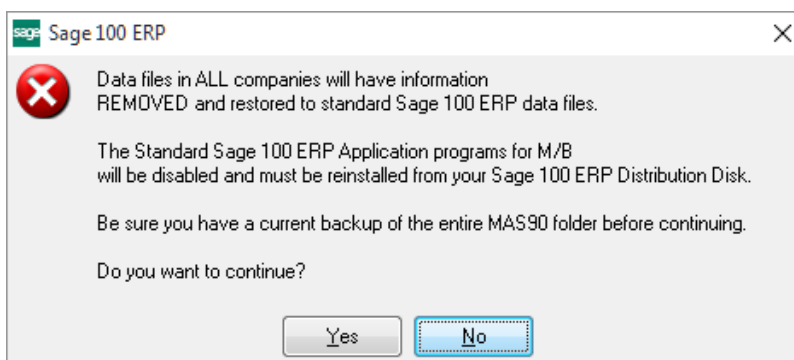
After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Sage 100 Product Updates, if applicable.

A message box will display which of those specific Sage 100 modules you must reinstall afterwards.

Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process.

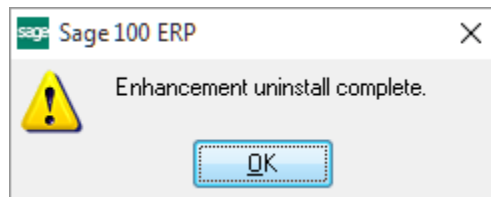
The following message box will appear, displaying the final warning message.



Select **No** to exit the Uninstall Process.

Select **Yes** to continue with the Uninstall Process. At this point, the DSD Enhancement will be removed from the Sage 100 system.

After completion of the Uninstall, the following message box will appear. Select OK to continue.



Now that the Uninstall process is completed, you must:

- Reinstall the applicable standard Sage 100 modules
- Reinstall the latest Sage 100 Product Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard Sage 100 module(s).

Appendix I: Multi-Bin Advanced Features

Multi-Bin Inventory Management Options

Multi-Bin Advanced adds several enhancements to the Multi-Bin Inventory Management Options.

Multi-Bin Inventory Management Options (ABC) 6/28/2020

1. Main 2. Entry 3. Printing

Item Bin Maintenance

Default View to Lot/Serial ☒

Distribution

Lot/Serial Distribution Order Bin Location First

Auto-Allocation Option Auto-Allocate

Default to Prior Value ☒

Allow Negative Bin Quantities (Non-Lot/Serial) ☒

Replenishment

Next Automatic Replenishment Entry Number 00000029

Default Replenishment Type Restock

Default Put Away From Selection From Bin Location

Default Restock To Selection To Bin Location

Default Put Away Report Sort Sort by Bin Location

Sales Order Distribution

Disable Bin Distribution Auto-Popup ☒

Bypass Prompt to Delete Line if Distribution is Incomplete ☒

Invoice / Shipping Distribution

Ship Allocated Quantity Yes

Only Auto-Ship from Enabled Location Types ☒

Auto-Increment Bin/Lot/Serial ☒

Min/Max Quantity

Min/Max Usage Replenishment and Data Entry

S/O

Auto Allocate in Increments of Sales U/M ☒

Accept Cancel

Distribution

Auto-Allocation Option: Select the default option for auto-allocation. You can select from “Auto-Allocate”, “Do not Auto-Allocate”, “Prompt to Auto-Allocate”, and “Button Selection”. Setting this option sets the default method. This can be manually changed at the warehouse level in Warehouse Bin Maintenance. (For more information see [Warehouse Bin Maintenance](#))

Replenishment

Next Automatic Replenishment Entry Number: This sequence number is used each time a Replenishment Entry is created in either Replenishment Entry or from Replenishment Selection. This number may be overridden or can be changed during the entry or selection processes.

Default Replenishment Type: Select the default Replenishment Type to be used during the Replenishment Selection process. Available options include “Put Away”, “Restock” or “Overstock”. This is the default and can be changed during Replenishment Selection.

Default Put Away From Selection: Select the default “Replenishment From” selection to be used during Put Away Replenishment Selection. Available options include “From Bin Location” or “From Location Type”. This option may be changed during the Replenishment Selection process.

Default Restock To Selection: Select the default “Replenishment To” selection to be used during Restock Replenishment Selection. Available options include “To Bin Location” or “To Location Type”. This option may be changed during the Replenishment Selection process.

Default Put Away Report Sort: Select the default report sort option for the Multi-Bin Put Away Report. Available options include “Sort by Bin Location” or “Sort by Alternate Sort”. This option may be changed during Put Away report printing.

Min/Max Quantity

Min/Max Usage: Select ‘Replenishment and Data Entry’ to use the Min/Max quantity feature in BOTH Replenishment Entry/Selection and normal data entries, or select ‘Replenishment Only’ to only use the Min/Max quantity feature in Replenishment Entry/Selection.

S/O

Auto-Allocate in Increments of Sales U/M: Select this checkbox to change the Auto-Allocation feature in Sales Order / Invoice Data Entry to auto-allocate in increments of the Sales U/M. Clear this checkbox to auto-allocate in increments on Standard U/M.

Multi-Bin Inventory Management Options (ABC) 6/28/2020

1. Main 2. Entry 3. Printing

Recap

P/O Receipts	Sort by Bin Location
P/O Returns	Sort by Bin Location
P/O Material Requisition	Sort by Bin Location
S/O Sales	Sort by Bin Location
VM Transaction	Sort by Bin Location
RMA Generate Transactions	Sort by Bin Location

Page Break by Warehouse Code ☒

Picking Sheets

Print Picking Sheets By: Bin / Item

☒ Allow Auto-Allocation During Picking Sheet Printing
☐ Enable PO ROG Update to print SO Picking Sheets
 Form Code to use from ROG:
☐ Populate 'Available' Fields
☐ Include Serial Numbers in 'Available' Detail
☐ Include Lot Numbers in 'Available' Detail
☐ Allow Auto-Ship from Picking Sheet Printing
 Shipper ID:

Accept Cancel

Allow Auto-Allocation During Picking Sheet Printing: Enable this option to allow allocations to occurring automatically when picking sheets are printed. Bin Distribution in Sales Order Entry must be enabled in order to enable this option. (For more information see [Picking Sheet Printing](#))

Enable PO ROG Update to print SO Picking Sheets: Select this checkbox to allow P/O Receipt of Goods Update to automatically print Sales Order Picking Sheets for items that are being received in the Receipt of Goods batch. If this feature is enabled, then select the Picking Sheet Form code in the **Form Code to use from ROG** field.

Allow Auto-Ship from Picking Sheet Printing: Select this checkbox to prompt the user to create Shipping Data entries for all Sales Orders that were selected/printed in the Picking Sheet Printing process. The quantities shipped will be the quantities that were auto-allocated.

Shipper ID: If you enabled the **Allow Auto-Ship from Picking Sheet Printing** feature, then enter the Shipper ID to be used when creating the Shipping Data Entry.

Allocations

The “Allocations” tab in Warehouse Bin Maintenance is used to define various allocation options and methods for each data entry task.

Warehouse Bin Maintenance (PMZ) 7/29/2022

Warehouse: 000 Description: MAIN WAREHOUSE

1. Main 2. Allocations

Data Entry	Default Bin Location	Auto-Allocation	L/S Auto-Allocation	Option	Default to Prior
IM Receipts		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
IM Transfer From		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
IM Transfer To		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
IM Issues		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
IM Sales		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
PO Receipts		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
PO Returns		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
PO Material Req		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
SO Sales Orders		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
SO Invoices		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
SO Credit Memo / RMA		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
BM Production Header		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
BM Production Lines		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
BM Disassembly Header		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
BM Disassembly Lines		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
PM Completion		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
PM Material Issue		Default Bin	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
Replenish / Put Away		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
Replenish / Restock		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>

Accept Cancel Delete

Default Bin Location: Select a default bin location for the specified data entry task.

Auto-Allocation: Select the auto-allocation option for the data entry task. Options available will vary based on whether the specified task is an “inbound” or an “outbound” transaction. For more information see “Auto Allocation Methods and Order of Allocations”.

L/S Auto-Allocation: Select from “Disabled”, “Receipt Date”, “Lot/Serial Number”, “Bin Location”, “Oldest Inbound Date”, “Last Inbound Date”, or “Expiration Date”. “Expiration Date” is only available if an Expiration Date User Defined field has been defined in Multi-Bin Options. This option is only available for outbound transactions.

Option: Select from “Do not Auto-Allocate”, “Auto-Allocate”, “Prompt to Auto-Allocate” or “Button Selection”. “Auto-Allocate” will automatically allocate quantities to bins with no prompt to the user during data entry. “Prompt to Auto-Allocate” will present the user with a “Yes/No” message box “Do you wish to Auto-Allocate?” “Button Selection” presents the user with an “Auto-Allocate” button in the multi-bin distribution screen.

Default to Prior: Enable this option to default the bin location to the prior bin location chosen in the prior row. This option is only valid for lot/serial items.

Auto-Allocation Methods and Order of Allocations

Inbound Transactions

Last Bin

1. Last Bin Location
2. Default Overstock Bin Location
3. Default Bin Location

Current Bin

1. Current Bin Location
2. Default Overstock Bin Location
3. Default Bin Location

Overstock

1. Default Overstock Bin Location
2. Default Bin Location

Item Receiving Bin

1. Default Receiving Bin Location 1 – 5
2. Default Overstock Bin Location
3. Default Bin Location

Default Bin Location

1. Default Bin Location

Outbound Transactions

Item Picking Bin

1. Default Picking Bin Location 1-5
2. Default Overstock Bin Location
3. Default Bin Location

Bin Location Order

1. Allocations are based on either Alphabetical or Alternate Sort

Descending Quantity

1. Allocations are based on the bin with the highest quantity available first, then to the lowest in descending quantity.

Ascending Quantity

1. Allocations are based on the bin with the lowest quantity available first, then to the highest in ascending quantity.

Replenishment Selection

The Replenishment Selection Task in the Multi-Bin Module allows users to quickly and easily generate transactions to move items from one bin location or area to another. This can be used in order to move items from a receiving staging location and put the items away in their assigned locations, or to restock items from overstock, or to refill/restock another area such as a showroom to its assigned stocking level.

When performing the Replenishment Selection, you may create a new Replenishment Entry by selecting the Automatic Next Replenishment Number button, or choose an existing Replenishment Entry number from the lookup field.

After selecting the "Proceed" button, users can review entries generated in the Replenishment Entry screen or by printing the "Put Away Report". Replenishment entries generated from the Replenishment Selection process can also be changed/edited in the Replenishment Entry task. After entries are made quantities will show as allocated in the "ReplenishmentTo" and "ReplenishmentFrom" columns on the item or bin. Once entries have been reviewed they must be posted in Replenishment Register/Update.

There are three Replenishment Types to select from, "Put Away", "Restock" and "Overstock".

Put Away

With the "Put Away" Replenishment Type, users can move items from one bin location or bin location type to multiple "to" locations. "Put Away" Replenishment uses inbound allocation methods set in

Warehouse Bin Maintenance to determine how items will be filled. Maximums assigned on the Bin Location are checked as well as any bin location restrictions are also checked.

Replenishment Selection (ABC) 7/21/2016

Replenishment Number: 00000025 Replenishment Type: Put Away

Warehouse Code: 000 CENTRAL WAREHOUSE

From Selection: From Bin Location

From Bin Location: RECEIVING Receiving Staging Area

Selections

Select Field	Operand	Value
To Bin Location	All	
To Location Type	All	
Item Code	All	
Product Line	All	

Proceed Cancel ?

Restock

With the “Restock” Replenishment Type, users can move items from many bins to one bin location or bin location type. “Restock” Replenishment uses outbound allocation methods set in Warehouse Bin Maintenance to determine how items will be relieved from inventory. The Restock Replenishment Type also requires that items and minimum/maximum levels are defined in Bin Location Maintenance on the Items tab. When a restock replenishment is run, each bin location is filled to its maximum. Restrictions set on bin locations are also checked during this process as well.

Replenishment Selection (ABC) 7/21/2016

Replenishment Number: 00000026 Replenishment Type: Restock

Warehouse Code: 000 CENTRAL WAREHOUSE

To Selection: To Location Type

To Location Type: SHOWROOM Showroom Location

Selections

Select Field	Operand	Value
From Bin Location	All	
From Location Type	All	
Item Code	All	
Product Line	All	

Proceed Cancel ?

Overstock

With the “Overstock” Replenishment Type, the system looks at each items “Overstock” bin location and moves any available quantities to fill the “Receiving” bin locations. Minimums, Maximums and any restrictions are also checked during this process.

Replenishment Selection (ABC) 7/21/2016

Replenishment Number: 00000024

Warehouse Code: 000 CENTRAL WAREHOUSE

Replenishment Type: Overstock

Select Field	Operand	Value
Receiving Bin Location	All	
Receiving Location Type	All	
Overstock Bin Location	All	
Overstock Location Type	All	
Item Code	All	
Product Line	All	

Proceed Cancel ?

*** Item Bin Maintenance (ABC) 7/21/2016**

Item Code: 1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK

Warehouse Code: 000 CENTRAL WAREHOUSE

1. Main | 2. Quantity | 3. Transactions | 4. Allocations

Disable Multi-Bin: ☐

Default Receiving Bin Location 1: E-300-10

Default Receiving Bin Location 2:

Default Receiving Bin Location 3:

Default Receiving Bin Location 4:

Default Receiving Bin Location 5:

Default Picking Bin Location 1:

Default Picking Bin Location 2:

Default Picking Bin Location 3:

Default Picking Bin Location 4:

Default Picking Bin Location 5:

Default Overstock Bin Location: OVERSTOCK

	Date	User	Quantity	Bin Location
Last Received	7/15/2016	DSD	100.00	RECEIVING
Last Issued	7/15/2016	DSD	12.00	E-300-10
Last Sold			.00	
Last Counted			.00	

Accept Cancel Delete

Items are moved from Overstock to Receiving locations

Replenishment Entry

Use the Replenishment Entry task to view entries generated during the Replenishment Selection process or to create new Manual Replenishments. You must select a warehouse code on the Header. Replenishment entries can only be performed within one warehouse code at a time. You cannot use Replenishment Entry to transfer items between warehouse codes.

Replenishment Entry (ABC) 7/21/2016

Replenishment Number: 00000029

1. Header | 2. Lines

Replenishment Date: 7/21/2016

Warehouse Code: 000 CENTRAL WAREHOUSE

Default From Bin Location:

Default To Bin Location:

Comment:

Putaway Report

Accept Cancel Delete

You can optionally also assign a Default From Bin Location and a Default To Location to be used when manually entering lines. The values assigned here on the header may also be changed during Line entry.

The “Put Away Report” may be printed by selecting the “Put Away Report” in the lower left part of the Replenishment Entry screen. Select the printer icon to print the Replenishment Register.

The Lines tab will display any entries generated during the Replenishment Selection process and include the Replenishment Type that was used at that time. Each line will display the Item Code, From and To Bin Locations, the Lot/Serial Number and the Quantity to Transfer. Additional “Manual” entries can be made as well.

Replenishment Entry (ABC) 7/21/2016

Replenishment Number: 00000029

1. Header | 2. Lines

Quick Row: 14


	Item Code	Repl Type	From Bin Location	To Bin Location	Lot Serial Number	Quantity to Transfer
2	2480-8-50	Restock	C-100-10	A-100-20	JAN10	100.00
3	2481-5-50	Restock	C-100-40	A-100-20	JAN10	100.00
4	8971	Restock	C-200-20	A-100-20	JAN10	100.00
5	GLOB-V-3672-25W	Restock	E-100-30	A-100-20		48.00
6	GLOB-V-3672-25W	Restock	RECEIVING	A-100-20		52.00
7	SPEAKERS	Restock	RECEIVING	A-100-20		100.00
8	WJ-M-2109-A	Restock	E-500-20	A-100-20		83.00
9	WJ-M-2109-A	Restock	RECEIVING	A-100-20		17.00
10	1001-HON-H252	Put Away	RECEIVING	E-300-10		100.00
11	2480-8-50	Put Away	RECEIVING	C-100-10	1235698	10,000.00
12	2481-5-50	Put Away	RECEIVING	C-100-40	1111	5,000.00
13	1001-HON-H252	Manual	E-300-10	A-000-00		1,745.00
14						.00

Description	
Product Line	
Costing	
Unit of Measure	
From Loc Type	
To Loc Type	

Put Away Report

The Put Away Report will print all entries made during either Replenishment Selection or Replenishment Entry. This report gives the user a simplified list of what Items and Quantities are moving, from where they are moving and which bin locations they are moving to. This report can be sorted by Bin Location or by Alternate sort and can be filtered using the Selections in the lower part of the Put Away Report printing screen.

Putaway Report (ABC) 7/21/2016

Report Setting: **STANDARD**  **Save**

Description: **Putaway Report**

Setting Options


Type: **Public** ☐ Print Report Settings ☐ Number of Copies: **1**

Default Report: ☒ Three Hole Punch: ☐ Collated: ☒

Sort Report By: **Bin Location**

Selections

Select Field	Operand	Value
Replenishment No.	All	
Warehouse	All	
From Bin Location	All	
To Bin Location	All	
From Location Type	All	

HP01746C (HP ENVY 120 series) ☐ Keep Window Open After Print ☐ Preview ☐ **Print** **Preview** **Setup** 

Put Away Report
Sorted by Bin Location


ABC Distribution and Service Corp. (ABC)

Warehouse: 000 CENTRAL WAREHOUSE

To Bin Location	Item Code / Description	From Bin Location	Lot / Serial Number	Quantity to Transfer
A-000-00	1001-HON-H252 HON 2 DRAWER LETTER FILE W/O LK	E-300-10		1,745.00
A-100-20	1001-HON-H252 HON 2 DRAWER LETTER FILE W/O LK	E-300-10		1,000.00
A-100-20	2480-S-50 DESK FILE 8" CAP 50	C-100-10	JAN10	100.00
A-100-20	2481-S-50 DESK FILE 5 1/4" CAP 50	C-100-40	JAN10	100.00
A-100-20	8971 UNIVERSAL 5 1/4" SSD FLEX DSK	C-200-20	JAN10	100.00
A-100-20	GLOB-V-3572-25W GLOBE FOLDING TABLE 35x72	E-100-30		48.00
A-100-20	GLOB-V-3572-25W GLOBE FOLDING TABLE 35x72	RECEIVING		52.00
A-100-20	SPEAKERS SPEAKERS	RECEIVING		100.00
A-100-20	WJ-M-2109-A POST BINDER 3/16 X 1/2 (100)	E-500-20		83.00
A-100-20	WJ-M-2109-A POST BINDER 3/16 X 1/2 (100)	RECEIVING		17.00
C-100-10	2480-S-50 DESK FILE 8" CAP 50	RECEIVING	1235696	10,000.00
C-100-40	2481-S-50 DESK FILE 5 1/4" CAP 50	RECEIVING	1111	5,000.00
E-300-10	1001-HON-H252 HON 2 DRAWER LETTER FILE W/O LK	RECEIVING		100.00
Warehouse 000 Total:				18,445.00
Putaway Report Total:				18,445.00

Replenishment Register/Update

Use the Replenishment Register/Update to review and post all transactions entered from the Replenishment Selection and Entry tasks. You must update all transactions currently in entry at one time.

 Replenishment Register (ABC) 7/21/2016

MULTI-BIN INVENTORY MANAGEMENT REPLENISHMENT REGISTER

HP01746C (HP ENVY 120 series)

Print Preview Setup ?

Replenishment Register						
ABC Distribution and Service Corp. (ABC)						
Replenishment Number	Replenishment Date	Warehouse Code/Description		Replenishment Comment		
Item Code Description	From Bin Location	To Bin Location	Lot / Serial Number	Replenishment Type	Quantity to Transfer	
00000029	000 CENTRAL WAREHOUSE					
1001-HON-H252 HON 2 DRAWER LETTER FILE W/O LK	E-300-10	A-100-20		Overstock	1,000.00	
2480-S-50 DESK FILE 8" CAP 50	C-100-10	A-100-20	JAN10	Overstock	100.00	
2481-S-50 DESK FILE 5 1/4" CAP 50	C-100-40	A-100-20	JAN10	Overstock	100.00	
8971 UNIVERSAL 5 1/4" SSD FLEX DSK	C-200-20	A-100-20	JAN10	Overstock	100.00	
GLOB-V-3572-25W GLOBE FOLDING TABLE 36x72	E-100-30	A-100-20		Overstock	48.00	
GLOB-V-3572-25W GLOBE FOLDING TABLE 36x72	RECEIVING	A-100-20		Overstock	52.00	
SPEAKERS	RECEIVING	A-100-20		Overstock	100.00	

Sales Order Picking Sheet Printing

Allocations for multi-bin items can also occur during Sales Order Picking sheet printing if desired. In order to allow for allocations during Picking Sheet printing, you must perform the following steps:

1. Enable “Lot/Serial Distribution in Sales Order Entry” in Sales Order Options.
2. Enable “Allow Bin Distribution during Picking Sheet Printing” in Multi-Bin Options.
3. Select an “Auto-Allocation” method and select an “L/S Auto-Allocation” method on the Allocations tab in Warehouse Bin Maintenance for SO/IM Sales. (see below)

Data Entry	Default Bin Location	Auto-Allocation	L/S Auto-Allocation	Option	Default to Prior
IM Receipts		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
IM Transfer From		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
IM Transfer To		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
IM Issues		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
PO Receipts		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
PO Returns		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
PO Material Req		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>
SO / IM Sales	A-100-00	Bin Location Order	Receipt Date	Prompt to Auto-Allocate	<input type="checkbox"/>
SO Credit Memo / RMA		Disabled	Disabled	Do not Auto-Allocate	<input type="checkbox"/>

Once setup has been completed for picking sheet printing, the “Multi-Bin” button is available in the Picking Sheet Printing screen. Select the “Multi-Bin” button to enable the “Auto-Allocation”, “Print Unallocated Quantities” and set the sort order for the picking sheets. The selection options here can be saved with each custom form code.

Multi-Bin Options

- Auto-Allocate ☒
- Print Unallocated Quantities ☐
- Populate 'Available' Fields ☐
- Include Serial Numbers in 'Available' Detail ☐
- Include Lot Numbers in 'Available' Detail ☐
- Exclude Sales Orders in Shipping/Invoice Data Entry ☒
- Print Picking Sheets By Order

Ok