*Statement of Work*

*prepared for:*



**Batch Pick Process**

**Original Creation Date: August 21, 2020**

**Created By: Mike Williams**

**For Review By: Patty Baird**

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| **Revision date** | **Revised By** | **Version** |
| **8.21.20** | **M. Williams** | **1.0** |
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| **Customer:** | Luca + Danni |
| **Project Name:** | Batch Pick Process |

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| **Project Description:** |
| *Project Overview*  Luca + Danni recently went live with the NetSuite applications. In preparation for their busy season they require a process to allow them to do a ‘batch pick’ for specific items that have a higher volume of orders placed. This is to save time during the picking process by limiting the number of trips people have to make to grab the same finished good from inventory.  In addition, they would like to further streamline the pick generation process to be more ‘fluid’ and reduce the number of clicks/parameter settings required to generate each grouping of the pick release documents.  These two requirements will be worked together into a single solution, but the requirements for each are documented below for review and approval.  *Scope*  **Streamlined Pick Release**  The following will be done to improve the pick release process in an attempt to save time and effort.  Currently, the pick release form is made up of various ‘drop down’ parameters that have to be changed for every run of the pick release depending on what the requirements are. This opens the door for errors, missed picks and is time consuming. Below is a picture of the current Pick screen.    The goal is to create a new pick release parameters for that removes the ‘drop down’ lists and creates ‘check boxes’ to identify the orders that need to have pick tickets created.  Filter By: This currently has three options: Ignore Item Availability, All Items Fully Committed and Ignore Item Availability. The new form should not have this option and should pull up all orders based on the selected parameters regardless of whether there is a commitment of inventory or not.  Location: This should always default to Main Warehouse : Warehouse Inventory.  Form: This drop down is going to remain, but should not present a problem. Because different resources process eComm vs Wholesale, once you select the Form you use you do not have to reselect it.  Allow Reprinting: This check box will remain and have the same functionality.  Hold for Shipment: This will be changed to a Check Box. The logic will be the same as the drop down list: Checked = Include Orders on Hold and Unchecked = Do Not Include Order on Hold.  Includes Gift Note: This will be changed to a Check Box. The logic will be the same as the drop down list: Checked = Includes Gift Note and Unchecked = Does Not Include Gift Note.  Includes Stack: This will be changed to a Check Box. The logic will be the same as the drop down list: Checked = Includes a Stack and Unchecked = Does Not Include a Stack.  Personalization Item: This will be changed to a Check Box. The logic will be the same as the drop down list: Checked = Includes a Personalized item and Unchecked = Does Not Include a Personalized Item.  Ship Via: This currently includes a list of Ship Methods and you can only select one. This will be changed to list each shipping method as an option with a check box next to it. The user can select one or more of these Ship Methods to filter the data.  Item: This is currently not an option on the existing Pick form. This new filter will allow the user to enter a specific FG assembly (the list will be filtered to only Child Matrix items). Only orders that have not been picked that contain the item entered will be returned.  Process Batch Pick: There will be a check box that can be selected to process the Batch Pick. If this box is selected, all other filters on the page become greyed out. The Batch Pick logic is detailed below. \*\*\* Note: if there is data in the Batch Pick table and the user is trying to process a standard pick using the filters, a pop up message will be presented asking if they want to process the Batch Pick first. If they choose Yes, the batch pick logic will be used. If they select No they can proceed with the standard pick and anything that was in the Batch Pick table that matches the selected criteria will be printed and those records will be removed from the Batch Pick table.  Detail Level: Based on the selected criteria, those records will be displayed at the lower section of the page just like the standard pick release form. The user can select individual or submit all. The page will default to having all records returned be checked for processing.  Submit Button: There will be a Submit button on the page to allow the user to process the selected records for pick release. Once they click on the Submit button, the pick slips will be generated for the selected Form just like on the current Pick Release form.  **Batch Pick**  There is a need at Luca + Danni to have the ability to perform a ‘Batch Pick’ for items where a high volume have been ordered in a short period of time. This saves the individual effort from having to go back to the same Bin location multiple times to get the same item.  There are two separate requirements for the Batch Pick.  *Pick By Item*   1. On the new Pick Release form there should be a field where they can enter a finished good item and have that filter only orders that need to be picked that have that include that item.    1. This Item field should be filtered to include Matrix Child Item only.    2. You can only select one item at a time. 2. If an item is selected, all other filters on the page are disabled. 3. Only orders that have at least one line with qty of at least 1 for this item will be returned to the detail section of the form (if they have not been previously pick released). 4. There will be a ‘check box’ next to the item field titled ‘single lines only’. This check box will only become available if an item is selected. If this box is checked, only single line orders that contain the selected item will be returned. 5. The document set for this will include a summary page including:    1. Header with logo, date, title of Batch Pick.    2. Detail level to include Item, Total Qty, Bin Reference.    3. Individual pick slips for each order selected.   *Total Batch Pick*   1. A custom detail table that will select sales order lines to include order ID, Order Number, Includes Gift Note flag, item, Item ID, line qty, line rate. It should have the following exceptions:    1. Do not include any personalized items (these are identified on the item record)    2. Do not include any Stack items (these are identified on the item record) 2. A custom summary table will be populated with the item, item ID, sum total qty. 3. There will be a ‘check box’ on the new pick release form to indicate whether Batch Pick should be done. If this box is checked, all other filters on the page become inactive. 4. There will be a saved search that will be scheduled to run and load the detail table prior to 6am EST. A script will then be used to pull the appropriate data into the summary table. 5. When Batch Pick is selected and processed, there will be a summary page printed to include any item from the summary table that has a sum total qty greater than 5 (\*Note: there will be a separate Parameters page created where they can modify the criteria. The search will look to pull the details from that parameter page so we don’t have to hard code it in the script. See below). 6. The summary page will print in Ascending order by Bin Reference, which is associated with the FG item. 7. There will be a detailed pick slip for each order selected in the Batch Pick. 8. The detail and summary tables will be purged after the Batch Pick process is run. 9. \*\*\*NOTE: If a standard pick release is processed prior to the Batch Pick, a ‘pop up’ message will be presented to ask if they wish to run the Batch Pick. They can select Yes or No. If they select No, then once that standard pick is run the detail and summary tables will be purged. |

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| **Assumptions:** |
| Luca + Danni (Customer) acknowledges the Project Scope defined above is contingent on the following key assumptions.   * Customer will provide required credentials and access to sandbox and production environments necessary to complete the work * Customer acknowledges and agrees to provide MSuite Consulting with prompt and adequate responses to its requests for information and other requests related to the performance of this SOW. This includes providing access to key stakeholders, functional representatives and end users to ensure timely completion of tasks. * Customer will provide access to existing documents and analysis related to the business requirements, system setup and configuration, application options, etc. * Unless otherwise stated in this SOW, Customer is responsible for any third parties or consultants not being provided by MSuite Consulting, associated with this project. * Customer is responsible for separately procuring at its own expense any necessary rights, license or subscription for any technology that is to be used in the performance of this SOW. * This is a Time and Materials engagement. Customer will be billed for hours worked. * All work will initially be done in the Sandbox environment and only deployed to Production after approval is received by Luca + Danni. Any refresh of the sandbox environment will be coordinated across the entire project team to prevent any loss of work. |

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| **Resource** | **Hours** | **Hourly Rate** | **Total** |
| Functional Consultant |  |  |  |
| NetSuite Developer |  |  |  |
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\*Should travel be required for MSuite Consulting personnel, Customer will reimburse MSuite Consulting for the reasonable travel, auto rental or mileage, lodging, per diem and other out-of-pocket expenses incurred by MSuite Consulting’s employees or contract personnel in performing the services described herein.

**Luca + Danni**  **MSuite Consulting Corporation**

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