Warehouse Management

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NetSuite WMS Overview

> **Important:** The information provided here describes the capabilities new as of NetSuite WMS Version 2019.2 and later. If you use the previous versions, you must upgrade your account. See the NetSuite WMS Upgrade Guide or watch the video below. .

Upgrading to NetSuite WMS 2020.1

NetSuite Warehouse Management System (WMS) is an important component for the efficient operation of your warehouse. It extends your NetSuite implementation and its inventory and warehouse management features so you can better manage your inventory and warehouse transactions.

Using a mobile device and processes customized to your warehouse setup, NetSuite WMS helps you improve your inventory accuracy and reduce the time you spend searching for and handling items in your warehouse. It guides you through your warehouse processing tasks, from receiving and storing items, to picking and shipping them. As you process items in your warehouse, each transaction you complete updates your NetSuite inventory data in real time to give you precise information about your inventory.

Feature Availability

The Warehouse Management feature is available only in accounts that use the Advanced Inventory Management feature.

You can use the Warehouse Management feature with the Pack Station SuiteApp, which enables order packing using a kiosk device.

Feature Setup and Warehouse Management Tasks

To complete the required and optional setup procedures, see NetSuite WMS Setup.

For instructions on using NetSuite WMS to perform warehouse processing tasks, see the following topics:

- Inbound Processing
- Inventory Processing
- Outbound Processing

For an overview on the mobile device screens, see Mobile Device Basics for NetSuite WMS.

NetSuite WMS Setup

For the initial setup procedures to enable Warehouse Management on your account, see the following topics:

1. Installing the NetSuite WMS SuiteApps
2. Enabling Features for NetSuite WMS
3. Activate the Enable Warehouse Management system rule. See System Rules for NetSuite WMS.

   > **Important:** In case the Oracle NetSuite WMS SuiteApp is no longer active or installed on your account, make sure you inactivate the Enable Warehouse Management rule. Otherwise, you might encounter issues when you try to process orders through your mobile device.

4. Warehouse Management Roles and Permissions

After you complete the initial requirements, see the following topics to continue your setup:

- Warehouse Management Records and Templates
- Setting Warehouse Management Preferences
- Warehouse Management Strategies
- Mobile Device Setup
- System Rules for NetSuite WMS
- NetSuite WMS Shipping Integration Setup

Configuring NetSuite WMS for Locations With No Bins

NetSuite WMS uses the Bin Management feature settings on location and item records to determine when to use the standard bin processing flows. When you configure locations with no bins, you process associated items and orders without bins.

For example, wave transactions for these locations do not display recommended bins. On your mobile device, the order picking process does not include bin selection and staging.

You cannot perform bin-related tasks, such as bin transfers, putaway, and replenishment for locations with no bins. For more information about Bin Management, see Enabling Features for NetSuite WMS.

Configuring NetSuite WMS for Locations that Do not use Bins

The following table shows the location and item settings that control NetSuite WMS flows:

NetSuite WMS Flow	Location	Item
Nonbin flow	Use Bins = cleared	Use Bins = checked or cleared
Bin flow	Use Bins = checked	Use Bins = checked

The Use Bins setting on item records does not affect how NetSuite WMS processes orders for items in locations with no bins. NetSuite WMS does not apply the standard bin flows even if you check the Use Bins box on the item record.

NetSuite WMS applies the standard bin flows only for locations and items that use bins. If you have items that do not use bins in these locations, receive, process, or fulfill them directly from their order transactions or through the NetSuite user interface. On a mobile device, you might encounter an error when you try to process items that do not use bins.

To configure NetSuite WMS for warehouse locations with no bins, create or update the following records in these topics:

1. Creating Warehouse Locations - To set up locations that with no bins, clear the Use Bins box on the location record.
2. Creating Items for NetSuite WMS - (Optional) On item records, you can assign a pick sequence number that NetSuite WMS uses to sort and display pick tasks on a mobile device.

   Make sure that the Use Bins box is configured correctly, especially if you have items associated with multiple locations, some of which may use bins.
3. Creating Item Stock Locations - (Optional) You can create item stock locations and associate them with items in warehouses with no bins.

NetSuite WMS Setup with Pack Station

If you want to use Warehouse Management with Pack Station, you can complete your Warehouse Management setup first, before you begin your Pack Station setup.

> **Note:** You should not use the packing capabilities available in NetSuite WMS and Pack Station at the same time. They do fulfillment and other record updates differently.

After you complete your Warehouse Management setup, the same features required for Pack Station should already be enabled on your account. You can begin your Pack Station setup by installing the Pack Station SuiteApp. For more information, see the help topic Pack Station Setup.

To use SCM Mobile capabilities, such as Bar Code Scanning, Mobile Printing, and Weighing Scale Support, you can complete the additional setup tasks for Pack Station. See the help topic Pack Station Settings and Capabilities.

Use the same log in URL from SCM Mobile to access the NetSuite WMS app on a mobile device and the Pack Station app on a kiosk device. For more information, see the help topics Mobile Device Hardware and Software Requirements and SCM Mobile App Access.

Installing the NetSuite WMS SuiteApps

To begin your NetSuite WMS setup, install the two SuiteApps in the required order as follows:

> **Warning:** If you do not follow the required order of installation, you will encounter issues with the rest of the set up. First, install the SCM Mobile SuiteApp, and then install the Oracle NetSuite WMS SuiteApp.

1. **SCM Mobile** - The SCM Mobile SuiteApp contains the mobile device application that enables you to process orders and tasks on your warehouse floor.
2. **Oracle NetSuite WMS** - The Oracle NetSuite WMS SuiteApp contains the business logic that drives your warehouse processes.

You can install these SuiteApps in your sandbox or production account, in the required order of installation.

> **Note:** After you install these two SuiteApps, you must enable the Warehouse Management feature and system rule. See Warehouse Management Feature and System Rule.
>
> In case the Oracle NetSuite WMS SuiteApp is no longer active or installed on your account, make sure you inactivate this rule. Otherwise, you might encounter issues when you try to process orders through your mobile device.

To install the NetSuite WMS SuiteApps:

1. Using the Administrator role, go to Customization > SuiteBundler > Search & Install Bundles.
2. On the Search & Install Bundles page, in the **Keywords** field, enter the name of the bundle you want to install, following the order in this list:
   a. **SCM Mobile** - 445345
   b. **Oracle NetSuite WMS** - 445891
3. Click **Search**.
4. From the bundle sublist, click the bundle name.
5. Click **Install**.

   > **Note:** The Install button appears only for bundles available to be installed in your account. If you do not find this button on the page, contact your NetSuite WMS account manager for more information about bundle access.
6. If you see a pop up message that asks for your permission to install future bundle updates, click **OK** to confirm.
7. On the Preview Bundle Install page, click **Install Bundle**.

   After you install the SCM Mobile SuiteApp, you can install the Oracle NetSuite WMS SuiteApp.

   The SCM Mobile bundle installs in about 3 - 5 minutes, while the Oracle NetSuite WMS bundle takes about 20 - 30 minutes to install. You can continue to work in your NetSuite account during bundle installation.

   To view the status of bundle installations, go to Customization > SuiteBundler > Search & Install Bundles > List.

Enabling Features for NetSuite WMS

You must enable prerequisite features first, and then enable the Warehouse Management and other features that suit your business requirements. For the list of features and guidelines, see the following topics in this section:

- Prerequisite Features for NetSuite WMS
- Additional Features for NetSuite WMS
- Warehouse Management Feature and System Rule

Prerequisite Features for NetSuite WMS

Prerequisite features must be enabled before you can enable the Warehouse Management feature:

Note: You must enable the Bin Management and Advanced Bin/Numbered Inventory Management features even if you only want to set up warehouse locations with no bins.

Company	Transactions	Items & Inventory	SuiteCloud
Multiple Units of Measure	▪ Advanced Shipping ▪ Pick, Pack and Ship - See the help topic Pick, Pack, and Ship Overview.	▪ Basic Inventory Management ▪ Multi-Location Inventory ▪ Bin Management - See the help topic Basic Bin Management. ▪ Advanced Bin / Numbered Inventory Management ▪ Advanced Inventory Management	▪ Custom Records ▪ Advanced PDF/HTML Templates ▪ Client SuiteScript - See the help topic Enabling SuiteScript. ▪ Server SuiteScript - See the help topic Enabling SuiteScript.

Additional Features for NetSuite WMS

You may need to enable the following features, depending on your business processes:

- Assembly Items
- Assembly Work Orders
- Serial Numbered Items
- Lot Numbered Items
- Inventory Status
- Inventory Count
- Advanced Item Location Configuration

  Note: Before you enable this feature, note the following item record changes:

  - You can enable this feature to access the Item Location Configuration record from the item record. On the Item Location Configuration record, you can set up the pick sequence number of an item for each warehouse location that does not use bins. For more information about pick sequence numbers, see Item Sorting.
  - For your existing item records, you can access the calculated inventory count fields on the Item Location Configuration record, instead of directly on the Locations subtab. See Creating Items for NetSuite WMS, Creating Calculated Inventory Counts, or Locations.

- Inbound Shipment Management

  Note: To receive inbound shipment orders for lot and serialized items, or items with inventory status, you must also enable the Inventory Detail on Inbound Shipment feature. Before you can enable this feature, you must contact NetSuite Customer Support to provision this feature for your NetSuite WMS account. See the help topic Inventory Details on an Inbound Shipment.

- Intercompany Cross-Subsidiary Fulfillment

- Bar Codes and Item Labels

Warehouse Management Feature and System Rule

Aside from installing the NetSuite WMS SuiteApps and enabling the prerequisite features, you must also complete the following setup tasks in the specified order:

1. Enable the Warehouse Management feature. For instructions, see To enable features for NetSuite WMS:.

   The Warehouse Management feature provides the capability to create wave transactions that you can use to release orders to the warehouse.
2. Activate the Enable Warehouse Management system rule. For instructions, see System Rules for NetSuite WMS.

   The Enable Warehouse Management rule exposes the menu items you use to start working with the warehouse management capabilities.

   In case the Oracle NetSuite WMS SuiteApp is no longer active or installed on your account, make sure you inactivate this rule. Otherwise, you might encounter issues when you try to process orders through your mobile device.
3. Make sure that you set up your new or updated login page URL on your mobile device. If you do not set up the latest URL, you might see a blank page on your mobile device screen. See the help topic SCM Mobile App Access.

To enable features for NetSuite WMS:

1. Go to Setup > Company > Enable Features.
2. Click the **Items & Inventory** subtab.
3. Under the Inventory heading, check the box next to **Warehouse Management**.

   > **Note:** If you do not find the Warehouse Management feature, contact NetSuite Customer Support to provision the feature for your account.
4. (Optional) Enable other features that suit your business requirements. See Additional Features for NetSuite WMS or Enabling Features.
5. Click **Save**.

Warehouse Management Roles and Permissions

This section contains the following topics about setting up roles and permissions, including custom roles provided by NetSuite WMS:

- Warehouse Management Roles
- Warehouse Management Permissions
- Assigning Custom Roles to Custom Mobile Processes

You can assign roles and permissions to pickers or warehouse operators, warehouse managers, and mobile administrators.

Warehouse Management Roles

To access records and perform warehouse processing or setup tasks, use the following standard or custom roles:

- **Administrator** - Use this standard role to enable features, install the SuiteApps, and create or manage records for NetSuite WMS.
- **Mobile – Administrator** - Without having all the standard administrator permissions, use this custom role to customize and configure mobile processes and mobile printing.
- **WMS Web Services Admin** - This custom role enables you to access and use the NSWMS Printer Driver Application. See NetSuite WMS Shipping Integration Setup.
- **WMS Warehouse Manager** - Use this custom role to perform certain setup procedures for mobile processes, such as activating system rules and creating item aliases or cycle count plans. You can also use this role to create records for WMS.

  The WMS Warehouse Manager role has access to the inbound, inventory, and outbound processing tasks on mobile devices. Specific permissions within the role also enable you to perform related tasks on the NetSuite user interface, such as pick task reversals and completing inventory counts.

  Warehouse Management provides the following specialized roles for warehouse managers:

  - **WMS Inbound Manager** - for inbound processing records and tasks only
  - **WMS Outbound Manager** - for outbound processing records and tasks only

  If you use Pack Station, this role automatically gains access to the Pack Station records and mobile app for kiosk devices. See the help topic Packing Roles and Permissions.
- **WMS Mobile Operator** - Use this custom role to perform all the warehouse processing tasks available in mobile devices.

  Warehouse Management provides the following specialized roles for operators:

  - **WMS Inbound Operator** – for inbound processing tasks and outbound picking through mobile
  - **WMS Outbound Operator** – for outbound processing tasks only

If you want to customize or configure roles for Warehouse Management, see Setting Up Roles for Warehouse Management.

Setting Up Roles for Warehouse Management

Depending on your business requirements, you can update existing roles or create new custom roles for Warehouse Management.

To set up roles for Warehouse Management:

1. To set up a role, do one of the following:
   - Create your copy of a role for warehouse managers or operators.

     Your copy of a custom role inherits the complete set of permissions, so you do not need to manually add each permission. To view the list of these roles, see Warehouse Management Roles.

     If you copy a role not based on any of the WMS roles, you can add the WMS permissions that suit your business requirements.

     For instructions on creating roles, see the help topic Customizing or Creating NetSuite Roles.
   - Update your existing custom role with the permissions that provide access to warehouse processing tasks through mobile devices.

For instructions, see the help topic Changing Custom Roles.

To view the list of inbound, inventory, and outbound processing permissions, see Warehouse Management Permissions.

2. To assign a role to a warehouse manager or operator, see the help topic Assigning Roles to an Employee.
3. (Optional) On the employee record of operators or pickers, verify that they have the correct warehouse location.

   Pickers with no location setting can be assigned to pick tasks from any warehouse location. If you specify a location on an employee's record, you can assign only pick tasks that belong to wave transactions from the same warehouse location. For more information about picker assignment, see Assigning Pick Tasks and Releasing a Wave.

   For instructions on updating employee records, see the help topic Adding an Employee. For more information about locations, see Creating Warehouse Locations.

Warehouse Management Permissions

The following tables contain the list of standard NetSuite and WMS permissions for inbound, inventory, and outbound processing:

- Inbound Processing Permissions
- Inventory Processing Permissions
- Outbound Processing Permissions

Use these tables as a guide when you want to manually add WMS permissions to your custom roles. The permissions allow roles to perform WMS tasks on both the NetSuite user interface and on a mobile device.

Add permissions based on your business requirements. For example, if you do not process work orders in your warehouse, you do not need to assign the Work Order permission. If you want your custom role to perform inbound and outbound processing tasks, you can combine the permissions from their corresponding tables.

To assign permissions, you can edit your custom role by going to Setup > Users/Roles > User Management > Manage Roles. On the Role page, you can set each permission and access level on the **Permissions** subtab. All minimum access levels for WMS permissions are set to **Full**, unless otherwise indicated in the table. For detailed instructions, see the help topic Setting Permissions.

For information about NetSuite permissions, view the following topics:

- For more information about permission levels, see the help topic Access Levels for Permissions.
- For the complete list of NetSuite permissions, see the help topic Permissions Documentation.

Inbound Processing Permissions

Inbound processing permissions enable the following tasks:

- Receiving purchase orders, transfer orders, and customer returns
- Posting of item receipts
- Bin putaway and cart moves
- Reversal of item receipts

The following roles are preset with these permissions: WMS Inbound Manager, WMS Inbound Operator, and WMS Warehouse Manager.

Transactions	Reports	Lists	Setup	Custom Record
Access Payment Audit Log (View level)	Inventory	Accounts (View level)	(Optional for custom roles) Accounting Preferences	WMS Open Task
Adjust Inventory	SuiteAnalytics Workbook	Bins	Bulk Manage Roles	WMS Process Status Flag
Audit Trail (View level)		Custom Record Entries	Custom Entry Forms	WMS Putaway Strategies
Bin Putaway Worksheet		Customer Profile (View level)	Custom Lists	WMS System Rules
Bin Transfer		Customers (View level)	Custom Record Types	WMS Task Type
Find Transaction		Departments (View level)	Custom Transaction Fields	
Fulfill Orders		Documents and Files	Custom Transaction Forms	
Inventory Status Change		Employee Record	Publish Dashboards	
Invoice		Employees (View level)	SuiteScript (View level)	
Item Fulfillment		Inventory Status	SuiteScript Scheduling	
Item Receipt		Item Process Family		
Purchase Order		Item Process Group		
Receive Order		Item Templates		
Receive Returns		Item/Category Layouts		
Return Auth. Approval		Items		
Return Authorization		Locations		
Transfer Order		Perform Search		
Transfer Order Approval		Record Custom Field		
		Tax Schedules		
		Units		
		Vendors (View level)		
		Zone		
		Pick Task (View level)		

Inventory Processing Permissions

Inventory processing permissions enable the following tasks:

- Inventory search, creation, transfer
- Inventory cycle counts and replenishment
- Bin transfer
- Picking and building assembly items for work orders

The WMS Warehouse Manager role is preset with these permissions.

Transactions	Reports	Lists	Setup	Custom Record
Access Payment Audit Log (View level)	Inventory	Accounts (View level)	(Optional for custom roles) Accounting Preferences	WMS Open Task
Adjust Inventory	SuiteAnalytics Workbook	Bins	Bulk Manage Roles	WMS Pick Strategies
Audit Trail (View level)		Custom Record Entries	Custom Entry Forms	WMS Putaway Strategies
Bin Transfer		Documents and Files	Custom Lists	WMS Task Type
Count Inventory		Employee Record	Custom Record Types	
Create Inventory Counts		Employees (View level)	Custom Transaction Fields	
Find Transaction		Inventory Status	Custom Transaction Forms	
Inventory Status Change		Item Process Family	Publish Dashboards	
Invoice		Item Process Group	SuiteScript (View level)	
Item Receipt		Item Templates		
Transfer Inventory		Items		
Work Order		Locations		
		Perform Search		
		Record Custom Field		
		Tax Schedules		
		Units		
		Vendors (View level)		
		Zone		

Outbound Processing Permissions

Outbound processing permissions enable the following tasks:

- Mobile picking of sales and transfer orders
- Pick task reversals
- Packing and shipping of orders

The following roles are preset with these permissions: WMS Outbound Manager, WMS Outbound Operator, WMS Inbound Operator, and WMS Warehouse Manager.

Transactions	Reports	Lists	Setup	Custom Record
Access Payment Audit Log (View level)	Inventory	Accounts (View level)	(Optional for custom roles) Accounting Preferences	WMS Open Task
Adjust Inventory	Sales Order Fulfillment Reports	Bins	Bulk Manage Roles	WMS Pick Strategies
Audit Trail (View level)	Sales Order Reports	Custom Record Entries	Custom Entry Forms	WMS System Rules
Count Inventory	Sales Order Transaction Report	Customers (View level)	Custom Lists	WMS Task Type
Find Transaction	SuiteAnalytics Workbook	Departments (View level)	Custom Record Types	
Fulfill Orders		Documents and Files	Custom Transaction Fields	
Inventory Status Change		Employee Record	Custom Transaction Forms	
Invoice		Employees (View level)	SuiteScript (View level)	
Item Fulfillment		Inventory Status	SuiteScript Scheduling	
Sales Order		Item Process Family		
Sales Order Approval		Item Process Group		
Transfer Order		Item Templates		
Transfer Order Approval		Item/Category Layouts		
Wave		Items		
		Locations		
		Perform Search		
		Pick Strategy		
		Pick Task		
		Shipping Items		
		Tax Schedules		
		Units		
		Vendors (View level)		

Transactions	Reports	Lists	Setup	Custom Record
		Zone		

Assigning Custom Roles to Custom Mobile Processes

You can give custom roles access to custom mobile processes. After you clone a process, you can assign it to your custom roles. For more information, see Customizing Mobile Device Processes.

To assign custom roles to custom mobile processes:

1. Using the Administrator role, go to Setup > Custom > Mobile – Applications.
2. On the Mobile – Applications List page, click **View** next to the mobile app that uses the process.
3. On the Mobile – Process List page, click **Edit** next to the custom mobile process.
4. On the Mobile – Process page, in the **Accessible Roles** field, select the custom roles.
5. Click **Save**.

   After you assign roles to a process, compile your app updates.
6. On the Mobile – Process List page, at the upper-right corner, click **Mobile Application List**.
7. On the Mobile – Applications List page, click **Update App** next to the mobile app that you have updated.

Warehouse Management Records and Templates

To create or update records for your warehouse configuration, see the following topics:

- Creating Warehouse Locations
- Configuring Records for Locations With Bins
- Creating Item Stock Locations

To create or update records for warehouse or shipping items and order types, see the following topics:

- Creating Item Process Families
- Creating Item Process Groups
- Creating Inventory Statuses
- Creating Items for NetSuite WMS
- Creating Item Aliases
- Creating Order Types
- Defining a UCC Code Format
- Creating Carrier Service Levels

If you want to customize outbound processing templates and forms according to your business requirements, see the following topics:

- Creating Custom Wave Criteria Templates
- Creating a Custom Pick Ticket Saved Search
- Creating Custom Advanced Templates for Pick Tickets
- Creating Custom Wave Forms
- Setting Up Custom Packing Lists

Creating Warehouse Locations

For each of your warehouses, you can create a location record and associate it with your items. You can track inventory and transactions for these items by location.

When creating a warehouse location record, you can set it to use or not use bins.

- For locations that use bins, items follow the standard bin process flow for creating waves and mobile processing tasks. You can create zones for these locations and associate both the location and zone with a bin. For more information about warehouse zones, see Creating Zones.
- For locations with no bins, you cannot process bin-related tasks, such as bin transfers, putaway, and replenishment. You can associate these locations with item stock locations. For information about stock locations, see Creating Item Stock Locations.
- You can associate locations that use and do not use bins with items that use and do not use bins. However, nonbin items for locations that use bins cannot be released in a wave transaction. Also, locations with no bins always follow the standard nonbin process flow regardless of the Use Bins setting of the item. See Creating Items for NetSuite WMS.

To create a warehouse location:

1. Using the Administrator role, go to Setup > Company > Classifications > Locations > New.
2. On the Location page, enter or select values in the following fields:
   - In the **Name** field, enter a unique name for the warehouse location.
   - Check the **Use Warehouse Management** box.
   - If you want to associate this location with bins, check the **Use Bins** box.
3. (Optional) Enter or select values in the other location fields. See the help topic Creating Locations.
4. Click **Save**.

Configuring Records for Locations With Bins

When you create locations that use bins, you can associate them with zones and bin records. You can also create strategies to specify zone priority and bin sorting for item putaway and order picking.

To create zones and bins, see the following topics:

- Creating Zones
- Creating Bin Locations or Carts
- Moving Existing Items To Bin Locations

To configure strategies, see Warehouse Management Strategies.

Creating Zones

Zones are areas in your warehouse that contain items with similar qualities or requirements. Some examples of warehouse zones might include an electronics zone, a special handling zone, or a refrigerated items zone.

In addition to helping you organize your warehouse, you can use zones in the definition of pick and putaway strategies.

When you create bin locations, you can assign them to zones. You may notice a performance impact if a zone has more than 4000 associated bins. You should create at least one zone record for each batch of 4000 bins in your warehouse. For information about bins, see Creating Bin Locations or Carts.

To create a zone:

1. Go to Lists > Supply Chain > Zone > New.
2. In the **Name** field, enter a name for your warehouse zone.
3. In the **Location** field, select the warehouse location to which the zone belongs to.

   > **Note:** This field displays only locations that use Warehouse Management. For more information, see Creating Warehouse Locations.

4. Click **Save**.

Creating Bin Locations or Carts

Bin records define physical bin locations within your warehouse. To track the on-hand inventory quantity in each bin, you can associate bin records with items. When you process orders for these items, NetSuite WMS displays the bin quantities on the receiving and fulfillment transactions.

For each warehouse and zone, you can create of the following bin types:

- **None** - Default bin type
- **Inbound Staging** – Stores received items before they are put away

  You can set an Inbound Staging bin record as a cart and use it for processing cart moves through a mobile device.
- **Outbound Staging** – Stores picked items before they are shipped
- **Picking** – Stores items that can be processed for fulfillment and shipping
- **Storage** – Stores items after they are put away, but before they are picked, transferred, or moved
- **WIP** – Stores assembly item components for work orders temporarily after they are picked, but before they are assembled

  If you use Manufacturing Mobile with Warehouse Management, you can enable **Use Bin in Manufacturing Mobile** for WIP bin types. This setting enables Manufacturing Mobile to access the WIP bin and specific capabilities on the NetSuite WMS app. For more information, see the help topic Creating a WIP Bin for Manufacturing Mobile.

> **Note:** You can create multiple bin records at one time by adding all of the bin information to a CSV (comma-separated value) file and using the Import Assistant to upload the data to NetSuite. Using the Administrator role, the Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. For more information, see the help topic Importing CSV Files with the Import Assistant.

On your mobile device, the use of bin types depends on the process, as described in the following:

- You can store, transfer, create inventory, and pick items in these bin types: Storage, Picking, or None.
- You can stage items in the following bin types:
  - Inbound Staging - to stage received items

    > **Note:** You can pick items for sales or transfer orders from an Inbound Staging bin by setting it up in a pick strategy. See Bin Sorting with Pick Strategies.

  - Outbound Staging - to stage picked items for sales or transfer orders
  - WIP - to stage picked items for work orders
- You can count items in all bin types, except those in WIP bins. See Inventory Counts.

To create a bin location or cart:

1. Go to Lists > Supply Chain > Bin > New.
2. On the Bin page, enter or select values in the following fields:
   - **Bin Number** - Enter a number or code to identify the bin or designate a bin location in your warehouse.

     For example, you want to create a bin numbering nomenclature that uses aisle, pallet position, and level in the format aisle-pallet position-level. You can assign the name A1-01-01 to the bin in the first aisle in the first pallet position of the first level.
   - **Bin Type** - Select the bin type.

     When you release orders to the warehouse, NetSuite WMS sorts bins by type to determine the recommended bin for picking. For more information, see Pick Task Sorting for Released Orders.
   - (Optional) **Sequence Number** - Enter the bin's sequence number in relation to other bins in your warehouse.

     Bin sequence numbers are used to determine which bins in a warehouse zone take priority when you pick items. When NetSuite WMS suggests bins for order picking, the bins appear in ascending order by bin sequence number. See Pick Task Sorting for Released Orders.
   - **Location** - Select the warehouse location of this bin.

     The location cannot be changed after you save the bin record.
   - **Zone** - Select the warehouse zone in which this bin is located.

     > **Note:** You may notice a performance impact if a zone has more than 4000 associated bins. You should not assign more than 4000 bins to the same zone. See Creating Zones.

     You can set this zone if you want to create pick strategies. See Defining Pick Strategies.
3. If you want to set an inbound staging bin as a cart, check the **Set as a Cart** box
4. If you want to set up the bin for replenishment, enter values in the following fields:
   - **WMS Replen Max Qty** - Enter the maximum quantity of an item the bin should contain after a replenishment.
   - **WMS Replen Min Qty** - Enter the minimum quantity of an item the bin should contain before a replenishment.
   - **WMS Replen Qty** - Enter the usual quantity of an item to be used for replenishment tasks.
   - **WMS Replen Round Qty** - Enter the multiple to which the required replenishment quantity should be rounded down to determine the required number of replenishment tasks.

   For more information about inventory replenishment, see Replenishment.

5. If you want to define putaway strategies, set the following fields:
   - **WMS Zone** - Select the warehouse zone you want to associate with this bin and to set up in a putaway strategy.
   - **WMS Put Seq No** - Enter the bin's sequence number with regard to other bins in your warehouse.

   For more information about putaway strategies, see Putaway Strategies or Defining Putaway Strategies.
6. (Optional) To add more bin details, enter values in the following fields: **WMS Pallet Position**, **WMS Aisle**, **WMS Level**.
7. For a WIP bin type, you can check the **Use Bin in Manufacturing Mobile** box if you want to use the bin for the Manufacturing Mobile processes.
8. Click **Save**.

After you create bin records, you can set up item records for use with bin locations. See Creating Items for NetSuite WMS or Moving Existing Items To Bin Locations.

Moving Existing Items To Bin Locations

If you have existing items in your NetSuite account and you want to associate them with bins, you can move those items to their storage bin locations using the WMS Bin Putaway Worksheet record type in the Import Assistant.

For more information, see the help topic Importing CSV Files with the Import Assistant or Items Import.

To move existing items to bin locations:

1. Create a CSV (comma-separated value) file with the following data:
   - Item
   - Name
   - Putaway Quantity
   - Serial/Lot Number (if required)
   - To Bin Location
   - Units
   - WH Location

   Note: You can import up to 500 line items in a single CSV file.
2. Log in to NetSuite WMS using the Administrator role.
3. Go to Setup > Import/Export > Import CSV Records.
4. Set the **Import Type** field to **Custom Records**.
5. Set the **Record Type** field to **WMS Bin Putaway Worksheet**.
6. Under CSV File(s), click **Select**.
7. Open the file you created in step one.
8. Click **Next** to move through the pages of the Import Assistant.
9. Click **Save & Run**.

Creating Item Process Families

Item process families are groupings of similar products that can be used to identify items that should be stored together in the same area of your warehouse. For example, you can create a clothing item process family to identify all clothing items. For locations that use bins, you can define a putaway strategy to store all clothing items in bin locations of your specified zone.

To create an item process family:

1. Go to Lists > Supply Chain > Item Process Family > New.
2. In the **Name** field, enter the name of the item process family you are creating.
3. (Optional) In the **Description** field, add details.
4. Click **Save**.

To associate item process families with items, see Creating Items for NetSuite WMS.

Creating Item Process Groups

Item process groups are groupings of similar products that use a more refined classification than item process families. For example, you can create a pants item process group to more specifically identify items rather than using a clothing item process family. Like item process families, you can use item process groups to define pick and putaway strategies for locations that use bins.

To create an item process group:

1. Go to Lists > Supply Chain > Item Process Group > New.
2. In the **Name** field, enter the name of the item process group you are creating.
3. (Optional) In the **Description** field, add details.
4. Click **Save**.

To associate item process groups with items, see Creating Items for NetSuite WMS.

Creating Inventory Statuses

If you use the Inventory Status feature, you can create inventory status records to associate attributes to items to drive internal processes. For example, you can create a Damaged inventory status record to prevent items with that status from being sold.

On NetSuite transactions, you can assign an inventory status to an item on the Inventory Detail subrecord. When performing tasks on your mobile device, you can select from a list of statuses associated with an item. You can also set inventory statuses as filters in pick strategies. For more information, see Inventory Status on Mobile Devices or Bin Sorting with Pick Strategies.

To create your inventory statuses, see the help topic Creating Inventory Status Records.

Creating Items for NetSuite WMS

Items are the goods you receive, store, or ship within your warehouse, as well as the parts or raw materials you purchase from vendors.

You can create items for locations that use or do not use bins. On the item record, NetSuite WMS provides additional fields that you can set based on the item type and your business requirements.

You can create multiple item records at one time by adding the item details to a CSV file and using the Import Assistant to upload the file to NetSuite. For example, you can configure a Use Bins column in the CSV file to check the Use Bins box on each item record at the time of import. For more information about CSV imports, see the help topic Importing CSV Files with the Import Assistant or Tips for Successful CSV Imports.

To create an item for NetSuite WMS:

1. Go to Lists > Accounting > Items > New.
2. On the New Item page, select one of the supported item types:
   - Assembly/Bill of Materials (also Lot Numbered or Serialized)
   - Inventory Item (also Lot Numbered or Serialized)
   - Kit/Package items
   - Non-inventory and service items (For Sale or For Resale only)

   For more information, see Supported Transactions and Item Types.
3. On the item page, enter or select values in the following fields:
   a. In the **Item Name/Number** field, enter a unique identifier for the item.
   b. (Optional) If you use the Bar Coding and Item Labels feature, in the **UPC Code** field, enter the item's UPC.

      On the mobile device, you can enter items using the UPC, instead of the item name or number.
   c. In the **Primary Units Type** field, select the unit type for the unit of measure you want to assign to this item.

      For more information, see the help topic Setting Up Units of Measure.
   d. (Optional) In the **Item Process Family** or **Item Process Group** fields, select a family or group, respectively, to which this item belongs.

      For more information about these fields, see Creating Item Process Families and Creating Item Process Groups.
   e. For lot numbered items, in the **Rotation Type** field, select one of the following options:
      - **FEFO** - First Expired, First Out
      - **LEFO** - Last Expired, First Out

   > **Note:** For locations that use bins, you can create pick strategies and add filters for the item process family, item process group, and rotation type. See Defining Pick Strategies.
4. (Optional) To set up calculated inventory counts for this item, on the **Purchasing/Inventory** subtab, do the following:
   a. Click the **Locations** subtab.
   b. Enter values in the following columns for each location in which you want to set up calculated inventory counts:

> **Tip:** If you use the Advanced Item Location feature for locations with no bins, set up the calculated inventory count fields on the Item Location Configuration popup window. To access this popup window, click **Configure** or **Edit** next to the location.

- In the **Inventory Classification** field, select the ABC velocity code you want to assign to the item.
- In the **Inventory Count Interval** field, enter the total number of days between required counts.

  For example, if you enter **30**, NetSuite WMS calculates the date a count is required based on 30-day intervals.
- In the **Next Inventory Count Date** field, enter the date of the next planned inventory count for this item.

  NetSuite uses this date to calculate when a count is required.

For more information about inventory counts, see Creating Calculated Inventory Counts.

5. On the **Accounting** subtab, in the **Tax Schedule** field, select the code or schedule.

   For more information, see the help topic Setting Tax Codes or Tax Schedules on Item Records.
6. (Optional) On the **NS WMS** subtab, configure any of the following:
   - If you want to set up tally scanning for this item, check the **Use Tally Scan** box.
   - In the **Shelf Life in Days** field, enter the number of days the item can remain in the warehouse.
7. For locations that use bins, configure any of the following fields:
   - On the **Purchasing/Inventory** subtab, click the **Inventory** subtab, and then check the **Use Bins** box.
   - (Optional) To let this item be mixed in a bin with different items and, for lot items, with different lots, on the **NS WMS** subtab, check the following boxes:
     - **WMS Mix Items in Bins** – Lets you mix this item with other items.

       For lot items, if you do not also check the WMS Mix Lots in Bins box, you can mix this lot item with other items, except for other lot items that have different lot numbers. In a sample Bin A, you can mix the following items: Item 1, Lot Item 2 with Lot# 2, Lot Item 3 with Lot# 2, and Serial Item 4.
     - **WMS Mix Lots in Bins** – Lets you mix a lot number for this item with other lot numbers.

       If you do not also check the WMS Mix Items in Bins box, you can mix different lot numbers, but for the same lot item only. In a sample Bin A, you can mix the following items: Lot Item 2 with Lot# 2, Lot Item 2 with Lot# 3, and Lot Item 2 with Lot# 4.

   > **Note:** To mix two items or lots in the same bin, the same box must be checked on both item records.

   - (Optional) To manually replenish the item using a replenishment report, enter values in the following fields:
     - **WMS Replen Min Qty** - Enter the minimum quantity of an item that should be stocked before it should be replenished.
     - **WMS Replen Max Qty** - Enter the maximum quantity of an item that should be stocked after it is replenished.
8. For locations that with no bins, on the **Purchasing/Inventory** subtab, configure any of the following fields:
   - (Optional) Click the **Inventory** subtab, and then check the **Use Bins** box.

> **Important:** For items associated with multiple locations that use and do not use bins, you must check the **Use Bins** box. For locations that use bins, this setting enables NetSuite WMS processing for these items.

- (Optional) If you want to assign a pick sequence number to the item or set up calculated inventory counts, do the following:

  > **Note:** Before you can assign sequence numbers to items, you must enable the Advanced Item Location feature. See Enabling Features for NetSuite WMS.

  - Click the **Locations** subtab, and then next to the location that does not use bins, click **Configure** or **Edit**.
  - On the Item Location Configuration popup window, in the **WMS Sequence Number** field, enter the pick sequence number of the item in relation to other items within the same location.
  - If you want to fill out the calculated inventory count fields, see step 4.
  - Click **Save**.

  For more information about sequence numbers, see Item Sorting.

9. (Optional) Set specific fields for each item type or other item fields. See the help topic Item Types or Creating Item Records.
10. Click **Save**.

Creating Item Aliases

Item alias records provide a name for an item that is alternate to the name used in your warehouse. When prompted to enter an item on your mobile device, you can enter an item alias instead of the item name.

For example, you can create an item alias to track an item's vendor code. For an item named **red t-shirt** in your warehouse, but has a vendor code of **12345678**, enter **12345678** in the item alias' Name field and select **red t-shirt** in the Item field.

If you activate the Enable Advanced Barcode Scanning? system rule for GS1 bar codes, you must create item alias records to map the GTIN-14 of a GS1 bar code to an item. You can set up the GTIN (01 identifier) or the GTIN of Contained Trade Items (02 identifier). For more information about the rule, see System Rules for NetSuite WMS.

> **Note:** If you set up both GTINs in your item bar code, NetSuite maps only the GTIN (01 identifier) to the item alias. For more information about identifiers, see Standard GS1 Application Identifiers.

An item can have more than one associated item alias. However, the same item alias cannot be associated with more than one item. For GS1 bar codes, you cannot set up multiple item alias records that have the same GTIN-14 and item, but with different units.

To create an item alias:

1. Using the WMS Warehouse Manager role, go to WMS Configuration > Configure Items > Item Aliases > New.
2. On the WMS Item Alias page, enter or select values in the following fields:
   a. **Name** - Enter a unique name for the item alias or enter the GTIN-14 for a GS1 bar code.

> **Note:** For GS1 bar codes, you must enter all digits of the GTIN-14, including the 14th digit reserved for the check digit.

b. **Item** - Select the item to which you want to assign this alias.

c. **Units** - (Optional) Select the item's unit of measure.

> **Note:** For GS1 bar codes, if you do not specify a default unit of measure in the item alias record, NetSuite WMS retrieves the transaction unit when you scan a GS1 bar code using your mobile device. Setting of default units apply to bar code scanning of GS1 formats only, and not to scanning of item aliases in other formats.

3. Click **Save**

For GS1 bar code scanning only, you can set up custom application identifiers to add more data to your bar code. See Setting Up Custom Application Identifiers for GS1 Bar Code Scanning.

Creating Item Stock Locations

For warehouse locations with no bins, you can create one or more stock locations for your items. If you create multiple stock location records for an item in your warehouse, you can assign one as the preferred stock location.

When you enter an item quantity on a mobile page, you can view the list of stock locations associated with an item.

To create item stock locations:

1. Using the WMS Warehouse Manager role, go to WMS Configuration > Configure Items > Item Stock Location > New.
2. On the WMS Item Stock Location page, enter or select values in the following fields:
   a. In the **Name** field, enter a unique name for the item stock location.
   b. In the **Item** field, select the item you want to associate with the stock location.
   c. (Optional) To set this stock location as the preferred one for the item, check the **Preferred (Per Item)** box.
   d. In the **Location** field, select the warehouse location.
3. Click **Save**.

Creating Order Types

Order types associate attributes to orders, which in turn drives internal processes. You can create an accounting list of multiple order types and associate each outbound order with one order type.

You can assign an order type as a filter on pick strategies. For example, you can create a pick strategy to define which zone to pick orders of a specified order type. When you release orders to the warehouse, NetSuite WMS applies the pick strategy only to the orders that match the type. For more information, see Bin Sorting with Pick Strategies.

To create an order type:

1. Go to Setup > Accounting > Accounting Lists > New.

2. On the Add to Accounting Lists page, click **Order Type**.
3. On the Order Type page, enter values in the following fields:
   - In the **Order Type** field, enter a unique name for the order type.
   - (Optional) In the **Description** field, you can enter a short description.
4. Click **Save**.

Defining a UCC Code Format

For orders that you pack through Warehouse Management, you can autogenerate serial shipping container codes (SSCC-18) in GS1 linear bar code format. Based on a format you define, NetSuite generates the 18-digit code. The corresponding GS1 linear bar code includes the 00 application identifier for SSCC. For more information about this bar code structure, see SSCC-18 Barcodes.

The autogenerated SSCC-18 bar code appears on shipping labels for printing if you activate any of these label printing rules: **Label Printing: UCC/GS1 Labels using ZPL** or **Label Printing: UCC/GS1 Labels with 3rd party integration**. On the WMS External Label Details page, the SSCC-18 appears in the UCC ID Code field. For more information and setup instructions, see the Label Printing topic in the NetSuite WMS Setup Guide 2019.1.

If you use the EDI Integration capability, the SSCC-18 links the information from the bar code and from the ASN that you send to customers. For more information and setup instructions, see Electronic Data Interchange (EDI) Integration.

Note the following guidelines for SSCC-18 code generation:

- You can edit the default format, UCC LP Range System Generated, to provide either your company prefix or DUNS number.
- As of NetSuite WMS 2021.2, the WMS License Plate Range record has been renamed to Autogenerated ID Format. To view the other enhancements for UCC Code generation, see the Renamed Records for UCC Code Generation topic in the NetSuite WMS Upgrade Guide.
- If you use the EDI Integration capability, the EDI returns the 18-digit SSCC when your customer scans the corresponding bar code. It may cause a mismatch because the GS1 bar code contains the additional 2 digits for the application identifier. To avoid a mismatch, verify that the scanning system of the receiver reads only the 18-digit SSCC.
- SSCC check digits are calculated based on the method of subtracting the computed value from the higher multiple of ten. For more information, see Check Digit Calculation.
- The Manually pack orders? rule controls the status of fulfillment records for orders picked through a mobile device. Whether you manually pack orders or not, you can view the SSCC-18 on shipping labels for fulfillments in Packed status. For more information, see System Rules for NetSuite WMS or Packing Orders.

To define a UCC code format:

1. To edit the default format, using the WMS Warehouse Manager role, go to WMS Configuration > UCC ID Codes > Autogenerated ID Format. Then, from the list, click **Edit** next to UCC LP Range System Generated.
2. On the Autogenerated ID Format page, set values in the following fields:
   - **Name** - Enter a unique name for your SSCC-18 format.
   - **Type** – Select **UCC**.
   - **Initial Number** - Enter your first number in the sequence for your serial reference number, which identifies the shipping container.

NetSuite increments this number by 1 for each subsequent serial reference number. If you do not specify your initial number, NetSuite uses **1** for your first serial reference number. The length of your serial reference number, from 6 to 9 digits, varies depending on the length of your company prefix or DUNS number.

For example, if you enter an 8-digit company prefix, your serial reference number must not exceed 8 digits. You can enter an initial number that has 8 digits or less, such as **00001000** or **100**. If you enter a number less than 8 digits, NetSuite automatically prepends the appropriate number of 0's to the serial reference number.

The Last Number Used field displays the number used for the serial reference number of the latest autogenerated SSCC-18 code.

- **DUNS Number - Company Prefix** - Enter your DUNS number, with 9 digits, or your company prefix, with 7-10 digits.

3. Click **Save**.

Creating Carrier Service Levels

A carrier service level record associates additional attributes with existing NetSuite shipping items. You can customize shipping processes to your warehouse requirements by applying the Quick Ship setting to your carrier service level.

You can create one or more carrier service level records for each shipping item that you use in your warehouse. When you set the Shipping Method field on sales and transfer orders, you associate the order with values you configure in the carrier service level record.

For more information about NetSuite shipping items, see the help topic Shipping Items.

To create a carrier service level:

1. Using the WMS Warehouse Manager role, go to WMS Configuration > Configure Warehouse > Carrier Service Levels > New.
2. On the WMS Carrier Service Level page, enter or select values in the following fields:
   - In the **Name** field, enter a unique name to identify this carrier service level.
   - (Optional) To assign a carrier service level record to a specific location or vendor, select values in the **Location** or **Vendor** field, respectively.

     > **Note:** If you do not set these fields, the carrier service level serves as the default for all locations and vendors. If you enable Allow Quick Ship for this carrier level, NetSuite WMS also enables quick ship for the associated shipping item in all locations and vendors. For more information about Quick Ship, see Manually Shipping Orders.

   - In the **NS Ship Method**, select the NetSuite shipping item you want to associate with the carrier service level.
3. To specify the carrier service level details, select or enter values in the following fields:

   > **Note:** Carrier service level details that you assign to a shipping item appear in the WMS Ship Manifest record associated with the order transaction. For more information, see WMS Ship Manifest Records.

   - In the **Carrier ID** field, enter the unique ID or name for the carrier.
   - In the **Carrier Type** field, select one of the carrier types: **PC** (parcel carrier) or **Custom** (other types).

- In the **Carrier Name**, enter the name of the carrier or organization that provides the carrier service.
- In the **Service Level**, enter the name of the carrier service level you want to associate with the NetSuite shipping item.

  Example: FedEx 2 Day Air.

4. If you want to enable the quick ship capability for the NetSuite shipping item associated with this carrier service level, check the **Allow Quick Ship** box.

   For more information about Quick Ship, see Manually Shipping Orders.
5. Click **Save**.

Customizing Warehouse Management Records

You can customize the templates and forms you used when releasing orders to the warehouse or printing packing lists according to your business requirements.

For instructions and guidelines, see the following topics:

- Creating Custom Wave Criteria Templates
- Creating a Custom Pick Ticket Saved Search
- Creating Custom Advanced Templates for Pick Tickets
- Creating Custom Wave Forms
- Setting Up Custom Packing Lists

Creating Custom Wave Criteria Templates

Wave criteria templates define the orders you want to include in wave transactions. You can customize the default search template by predefining the standard filtering criteria or adding more filters to suit your wave requirements. You can also add columns to the order search results that appear on wave transactions.

For example, you can create separate custom templates for orders to be shipped by FedEx and by UPS. Include a custom field if you want to specify the route. When you create a wave transaction, you can select the custom template that contains the filters you want to apply to your order search.

You can also use custom wave templates if you want to run a schedule to generate and release wave transactions. See Creating a Wave Release Schedule.

Read the following guidelines for creating wave criteria templates:

- All custom search templates must have the **_nswave** suffix in the ID.
- For the Location filter, you can select a warehouse location only. See Creating Warehouse Locations.
- Before using a template, you can test it by clicking the Preview option on the saved search record. An error message appears when the order search retrieves more than 10,000 line items. To narrow down the results, be sure to adjust the criteria accordingly.
- The fields on the Results subtab of a search template appear as columns on the Orders and Line Item subtabs of wave transactions.

To create custom wave criteria templates:

1. Using the Administrator role, from your browser, access the custom search template by appending your NetSuite account URL with:

   app/common/search/search.nl?id=-4241&e=T&cu=T

Example: https://<accountID>.app.netsuite.com/app/common/search/search.nl?id=-4241&e=T&cu=T

> **Tip:** After your initial access, the URL redirects you to the Saved Transaction Search page in edit mode. You can skip steps 2 and 3.

2. On the Transaction Search page, click **Edit**.
3. On the Saved Transaction Search page, click **Edit this Search**.
4. Enter the basic saved search details in the following fields:
   - In the **Search Title** field, replace the default name with your own name for your search template.
   - In the **ID** field, replace the default ID with your own unique ID for your search template, and then add the **_nswave** suffix.
5. Make sure that the **Public** and **Available as List View** boxes are checked.
6. (Optional) To remove or add available filters that you can define in this template, click the **Available Filters** subtab, and then do any of the following:

   > **Note:** When you add or remove filters from the **Available Filters** subtab, you display or hide them from the Wave Criteria form, respectively. For more information about this form, see Creating Wave Transactions.

   - **Add filters** - In the **Filter** column, select a field to add as an available filter, and then click **Add**.
   - **Remove filters** - click the filter's row and then click **Remove**.
   - **Update filter labels** - In the **Label** column, view or update a filter's label.

     Labels appear as the field names on the Wave Criteria form.

   Make sure that your custom templates contain the following required filters:

Required Filters	Description
Location	Warehouse location
Type	Any of the supported transaction types: sales orders or transfer orders

   Depending on your wave requirements, you can keep or remove the following optional filters:

Optional Filters	Description
Transaction Number/ID	The transaction number of the sales or transfer order
Name	For sales order, name of the customer
Order Date	Order date on the transaction
Ship Date	The date when orders are scheduled for shipment
Ship Via	Shipping method on the transaction
Item : Item Process Family	Item process family associated with the ordered items
Item : Item Process Group	Item process group associated with the ordered items
Item	Name of the item
Order Type	Order type on the transaction

7. To define your filtering criteria for the available filters, click the **Criteria** subtab, and then do the following:

> **Note:** Your filtering criteria appear as default settings in their corresponding fields on the Wave Criteria form. For more information about this form, see Creating Wave Transactions.

a. In the **Filters** column, select the available filter you want to define.

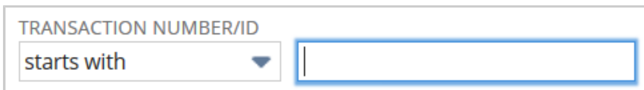
   The Saved Transaction Search popup window appears on the page. If the popup does not display automatically, click the Set Description icon beside the filter.

b. On the popup window, define the filtering criteria, and then click **Set**.

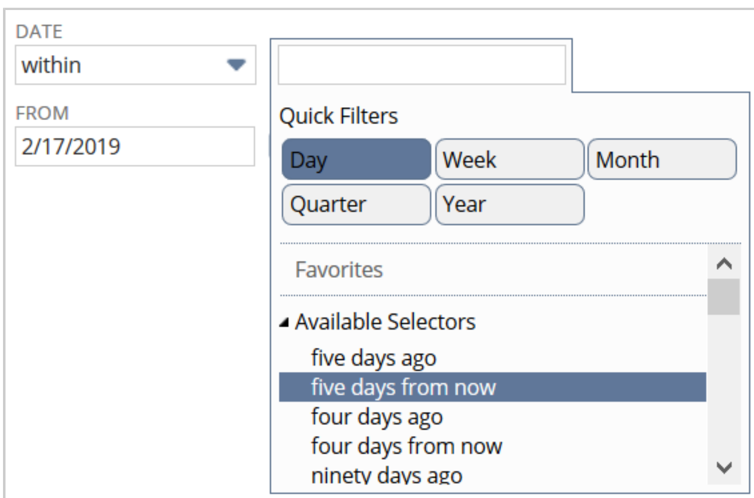
   The following examples show you how to define text and date filters:

   - For text filters, you can add a selector to enter part of a filter's value.

     For example, to set the Transaction Number/ID filter, select the **starts with** selector, and then enter part of the transaction ID as the keyword.



   - For date filters, you can replace the default **All** date selector by clicking its field.



     You can also specify a date range by entering or selecting dates in **From**, **To**, or both fields.

   For detailed instructions on defining filters, see the help topic Defining a Saved Search.

c. Click **Add**.

Repeat steps a - c to define more filters.

8. (Optional) To add columns for your order search results on the Wave page, do the following:

> **Note:** When your order search results appear on the Wave page, you can view the new columns on the **Orders** and **Line Items** subtab. For more information, see Creating Wave Transactions.

a. Click the **Results** subtab.

b. In the **Columns** subtab, select the field you want to add as a column on the Wave page.

c. Click **Add**.

Repeat steps a - c to add more columns.

9. To test and preview the results before you use the template, click **Preview**.
10. Click **Save**.

When you create a wave, you can select your custom wave template to search for the orders you want to include in the wave.

If you want to view or edit a custom search template, go to Lists > Search > Saved Searches.

Creating a Custom Pick Ticket Saved Search

NetSuite WMS provides a standard pick ticket saved search, which you can customize to display additional standard or custom transaction body fields on pick tickets. Fields that you add to your pick ticket saved search must also be added to the advanced pick ticket templates on which you want the fields to appear. When you print pick tickets, wave transactions can generate the pick tickets using your custom saved search, instead of the standard saved search.

Before you create a custom pick ticket saved search, read the following guidelines and limitations:

- If you create multiple custom pick ticket saved searches, NetSuite WMS can use only the latest one to generate pick tickets. To generate pick tickets that show different sets of fields from templates, add all the fields to a single custom saved search, and then specify the fields you want to display on each template.
- Your pick ticket saved search must have the **_nspickticket** suffix in the ID.
- Before you add a custom transaction body field to a saved search, make sure that you have already created and added the field to a transaction. See the help topic Creating Custom Transaction Body Fields.

  > **Note:** If you create a custom field, take note of its internal ID, which you must set up on advanced pick ticket templates. For more information, see the help topic How to Find a Field's Internal ID or Creating Custom Advanced Templates for Pick Tickets.

- On the Results subtab of your saved search, do not remove any default fields on your custom pick ticket saved search. Removing default fields might affect the field groupings on a pick ticket. On advanced pick ticket templates, you can hide fields that you do not want to appear on your pick ticket.
- On the Filters subtab of your saved search, do not add filters to your custom pick ticket saved search. When you print pick tickets from a wave transaction, NetSuite WMS applies default filters in the backend to ensure that pick tickets display only data associated with the template on the wave form.

For more information about advanced pick ticket templates and custom wave forms, see the following topics:

- Creating Custom Advanced Templates for Pick Tickets
- Creating Custom Wave Forms

To create a custom pick ticket saved search:

1. Using the Administrator role, go to Lists > Search > Saved Searches.

   From the Saved Searches list, click the **Edit** link next to any saved search.
2. On the address bar of the saved search page, replace the id value of the URL with **-4389**, without changing any other part of the URL.

   Sample pick ticket saved search URL in edit mode:

   https://9999999.app.netsuite.com/app/common/search/search.nl?id=**-4389**&e=T&cu=T&whence=
3. Press **Enter**.

The Saved Pick Ticket Search page appears in edit mode.

4. On the Saved Pick Ticket Search page, enter values in the following fields:
   - In the **Search Title** field, enter a unique name for your saved search.
   - In the **ID** field, replace **default** with a unique ID, without deleting the **_nspickticket** suffix.
5. On the **Results** subtab, click the **Columns** subtab, and then do the following:
   a. In the **Field** column, select the field or the record associated with the field.

      When you select a record, on the Saved Search popup window, select a field from the list.

   b. In the **Custom Label** column, enter the field label you want to appear on the pick ticket.

   c. Click **Add**.

   d. If you want to add another field, click **Add Row**.

      Repeat steps a to c for each field you want to show on the pick ticket.
6. If you want to change the default sorting on a pick ticket, in the **Sort By** field, select the primary sorting field.

   > **Tip:** In the **Then By** fields, you can select additional sorting fields that you want to apply to pick tickets.

7. Click **Save As**.

If you want to view or edit a custom saved search, you can go to Lists > Search > Saved Searches.

Creating Custom Advanced Templates for Pick Tickets

You can modify pick tickets generated from released waves by customizing the advanced print template, Standard Pick Ticket/Pick Report PDF/HTML Template. You can display more fields on a pick ticket, update the field arrangement, and perform other such customizations. For information about the standard pick ticket for released orders, see Printing Pick Tickets from Wave Transactions.

> **Important:** To access and create advanced print templates, you must enable the Advanced PDF/HTML Templates feature in your account. For more information, see the help topic Enabling the Advanced PDF/HTML Templates Feature.

If you want to display more standard or custom fields, first you must add the fields to a custom pick ticket saved search. You can create multiple templates to display fields from a single custom saved search. Make sure that you have the internal ID of each field you want to add to a template. For more information, see or How to Find a Field's Internal ID or Creating a Custom Pick Ticket Saved Search.

To create custom advanced templates for pick tickets:

1. Using the Administrator role, go to Customization > Forms > Advanced PDF/HTML Templates.
2. From the Advanced PDF/HTML Templates list, click **Customize** for Standard Pick Ticket/Pick Report PDF/HTML Template.
3. If you want to display standard or custom fields from a pick ticket saved search, do the following:
   a. On the **New Element** subtab, you can find the section or table where you want to display the field.

      The pick ticket template includes the tables for single and multi-order picking types. You can use the Source Code editor to add or remove elements from the table for one or both picking types. For more information about picking types, see Printing Pick Tickets from Wave Transactions.

b. On the upper-right side of the page, click the **Source Code** toggle.

c. On the Source Code editor, configure the internal ID of the field in a new or existing section or table column.

> **Tip:** By default, the table for single order picking starts at Line 164. To find tables or other elements for single order picking, you can search for tags with `picktype==“SINGLE”`.

For example, you want to display a custom field after the Pick Task # column of the table for single order pick tickets. You can add the table header and table data tags and set the internal ID of the field as follows:

- **Table header** – After the line for the pick task number column heading (Line 175 by default), you can copy and add a <th> tag with its default attributes. Set the internal ID of the custom field for the label.

```
<th class="thStyleOrderItem" style="width:8%">
${lineitem.samplecustomfieldID@label}</th>
```

- **Table data** – After the line for the pick task number data (Line 200 by default), you can copy and add the corresponding <td> tag with its default attributes. Set the internal ID of the custom field for the cell or data.

```
<td align="center" class="tdStyle" line-height="100%" style="width:6%" vertical-
align="middle">${lineitem.samplecustomfieldID}</td>
```

d. For each tag, you can modify attribute values, like width or vertical alignment, fit the data within the columns of a table or margins of a page. For more information about source code editing, see the help topic Source Code Editing to Customize Advanced Templates.

4. If you want to set your custom template as the preferred template for custom wave forms, do the following:

   a. Click **Template Setup**.

   b. On the Template Setup popup window, check the **Template is Preferred** box.

   c. If you want to replace the template name, in the **Title** field, enter the template name.

   d. Click **Save**.

   For detailed instructions, see the help topic Template Setup Window.

5. Click **Save**.

After you create your custom advanced print template, you can assign it to a custom wave form. Your wave form can use the custom advanced print template to generate pick tickets. For more information, see Creating Custom Wave Forms.

Creating Custom Wave Forms

When you customize the Wave form, you can assign your own custom advanced print template for generating pick tickets. You can also set your custom form as the preferred form for creating wave transactions.

To create custom wave forms:

1. Go to Customization > Forms > Transaction Forms.
2. From the Custom Transaction Forms list, click **Customize** next to the Wave form.
3. On the Custom Transaction Form page, enter the values in the following fields:

- In the **Name** field, enter a name for your custom wave form.
- In the **ID** field, enter a unique ID.

  For detailed instructions on creating custom forms, see the help topic Creating Custom Entry and Transaction Forms.

4. If you want to set the custom form as the default form for wave transactions, check the **Form is Preferred** box.
5. If you want to assign a custom advanced template for pick tickets, do the following:
   - In the **Printing Type** field, choose **Advanced**.
   - In the **Print Template** field, select your custom advanced template.
   - In the **Email Template** field, select your custom advanced template.

   For more information about custom templates for pick tickets, see Creating Custom Advanced Templates for Pick Tickets.
6. Click **Save**.

You can use your custom wave form on saved wave transactions, which you can access by going to Transactions > Inventory > Release Orders to Warehouse > List. For more information, Updating Waves and Handling Wave Issues.

Setting Up Custom Packing Lists

NetSuite WMS provides the default script, wms_sl_CustomPrintpacklist.js, in SuiteScript 2.0 that contains the PDF packing list. You can copy this script file and customize your copy according to your packing list requirements.

Before you can set up custom packing lists, you must activate the Use custom packing lists? system rule. See System Rules for NetSuite WMS.

To set up custom packing lists:

1. Log in to your NetSuite WMS account using the Administrator role.
2. In the global search field, enter **wms_sl_CustomPrintpacklist.js**, and then from the search results, click **JavaScript File: wms_sl_CustomPrintpacklist.js**.
3. To download your copy of the default script file, do the following:
   a. On the File page, click **Download**.
   b. On the popup window, click **Save File**.
   c. When saving your copy of the script, enter a unique filename for your .js file, and then save it in a local folder on your computer.
4. Edit your copy of the script file to add your customizations for the PDF packing list.
5. To upload your customized script file, go to Documents > Files > File Cabinet, and then do the following:
   a. On the File Cabinet page, on the navigation panel, access the SuiteScript folder of the Oracle NetSuite WMS Bundle folder from the following path: SuiteBundles > Bundle (ID) > src > SuiteScripts.

      For more information about the Oracle NetSuite WMS bundle, see Installing the NetSuite WMS SuiteApps.
   b. Click **Add File**, and then select the script file you want to upload.
6. To create a new script record for your script file, go to Customization > Scripting > Scripts > New, and then do the following:

  a. On the Upload Script File page, in the **Script File** field, click the double down arrow icon, and then click **List**.
  b. From the list of script files, select the script file you want to associate with this record.
  c. Click **Create Script Record**.
  d. On the Script page, fill out the fields for your new script record.

     For detailed instructions, see the help topic Creating a Script Record.
  e. Click **Save and Deploy**.

   The Script Deployment page appears.

7. Fill out the fields for your new script deployment record, and then click **Save**.

   For instructions on creating a script deployment, see the help topic Methods of Deploying a Script.

   > **Tip:** When you are ready to deploy the script, check the **Deployed** box. In the **Execute As Role** field, select **Administrator**. In the **Status** field, select **Released**. On the **Audience** subtab, beside the **Roles** field, check the **Select All** box.

8. Access and copy the ID of your custom script and script deployment record.
  a. Go to Customization > Scripting > Scripts.
  b. On the Scripts page, copy the ID of your custom script.
  c. Click the Deployments link for custom script.
  d. On the Script Deployments page, copy the ID of your custom script deployment.

   When you activate the Use custom packing lists? system rule, enter the IDs in the appropriate fields. For requirements and instructions on activating this system rule, see System Rules for NetSuite WMS.

Setting Warehouse Management Preferences

Depending on your business needs, set the following preferences that affect one or more warehouse processing tasks:

- **Automatically Set to Firm Committed Quantities in a Wave** – Automatically checks the Commitment Confirmed box for transaction lines of orders that you include in a wave.

  If you want to reallocate the quantities committed for the order, you can clear the Commitment Confirmed box. However, NetSuite WMS does not adjust the quantities on the wave transaction and its pick tasks. On your mobile device, you should pick only the remaining committed quantities, which you can partially fulfill. Do not pick the entire quantity on the released wave without replenishing the committed quantities on the order transaction. NetSuite WMS cannot generate a fulfillment record for the order.
- **Using Preferred Bin on Item Receipts** – Determines if the Bin field on item receipts defaults to the preferred bin instead of leaving the field blank.
- **Default Items to Zero Received/Fulfilled** – When you set this preference, items default to unfulfilled when you open a fulfillment transaction. You can mark the items you want to fulfill on the fulfillment.
- **Use Pick to Clean Process at Locations Using Warehouse Management** - Indicates your preference to pick from bins that can be emptied, before those with larger quantities.
- **Create Item Fulfillment at Locations Using Warehouse Management** - Provides two options for creating item fulfillments of released orders:
  - **Per Order** - (default setting) Generates item fulfillments for each released order.

  - **Per Order Line** - Generates item fulfillments for each line item of a released order.

> **Note:** For standard and custom mobile processes, NetSuite WMS does not support the entry and mandatory setting of class and department classifications. For more information about these mandatory preferences, see the help topic Classifications. For more information about mobile processes, see Mobile Device Setup.

To set warehouse management preferences:

1. Go to Setup > Accounting > Preferences > Accounting Preferences.
2. On the Accounting Preferences page, click the **Order Management** subtab, and then check the box or select the option for the preference you want to use.
   - Sales Orders section: **Automatically Set to Firm Committed Quantities in a Wave**
   - Picking/Packing section: **Use Pick to Clean Process at Locations Using Warehouse Management**
   - Fulfillment section: **Default Items to Zero Received/Fulfilled** or **Create Item Fulfillment at Locations Using Warehouse Management**
3. Click the **Items/Transactions** subtab.
4. In the Inventory section, check the box next to the preference that you want to use: **Use Preferred Bin on Item Receipts**.
5. Click **Save**.

Warehouse Management Strategies

Warehouse management strategies define where received items should be put away or where operators should go to pick ordered items.

NetSuite WMS uses the sequence number of your strategies to determine which strategy should take priority over other applicable strategies. Based on the criteria defined in your warehouse management strategies, it suggests the appropriate bin locations for picking and putting away items.

You can define the following strategies for warehouse locations that use bins:

- Defining Pick Strategies
- Defining Putaway Strategies

Defining Pick Strategies

Pick strategies define the zones where warehouse operators can pick specific items or orders within warehouses that use bins. They also determine the bin locations NetSuite WMS suggests in the outbound processing of orders, assembly of work orders, and replenishment.

When you process released orders in your warehouse, you can apply pick strategies to prioritize the warehouse zones that you want to target to pick specific orders. Without pick strategies, NetSuite WMS uses the bin sorting process to select the recommended bin for picking. For more information about bin sorting, see Pick Task Sorting for Released Orders.

NetSuite WMS selects and applies pick strategies when you release orders to the warehouse, pick or build assembly items, and replenish bins. On a pick task subrecord of released orders, you can view the list of available bins for an item, each with a zone from the applied strategy. You can view the same list of bins on a mobile page for a work order or replenishment process. The list displays the first bin as the recommended bin.

To define a strategy, specify the filtering and sorting criteria, and then add the zones in descending order of priority. Zones that you place at the top of the list contain the bins to be selected first for picking. By prioritizing the warehouse zones, you can target those where you want specific orders or items to be picked from. For example, if you have a Rush Order option for the order type, you can define this filter on a pick strategy and add the zones accordingly. This strategy directs warehouse operators to pick rush orders from available bins in the first applicable zone.

To define pick strategies:

1. Go to Lists > Supply Chain > Pick Strategy > New.
2. On the Pick Strategy page, fill out the required fields and filters:
   - In the **Name** field, enter a unique name for the strategy.
   - In the **Sequence Number** field, enter the sequence number of the strategy.

     This number is used to sort multiple pick strategies.

     > **Note:** A strategy with a lower sequence number takes priority over a strategy with a higher sequence number.
     >
     > For example, strategy A has a sequence number of 2 and strategy B has a sequence number of 4, and both strategies apply to item X. When you pick item X, NetSuite WMS suggests a bin location in the zone defined in strategy A before a bin location in the zone defined in strategy B.

   - In the **Transaction Type** field, select one of the supported transaction types: **Replenishment** , **Sales Order**, **Transfer Order**, or **Work Order**.
   - In the **Location** field, select one warehouse location.
3. (Optional) Set the filter fields in the Item Criteria, Order Criteria, or Recommended Bin Filter sections.

   As you set more filters, you refine the items, orders, or both to which this pick strategy can be applied. For more information about these filters, see Bin Sorting with Pick Strategies.
4. On the **Pick Zones** subtab, you must add at least one warehouse zone.
   a. In the **Sequence Number** column, enter the sequence number of the zone in relation to other zones in this pick strategy.
   b. In the **Zone** column, select a warehouse zone from the list.

      The list displays the warehouse zones from your selected location.
   c. Click **Add**.

   Repeat steps a - c to add more zones.
5. Click **Save**.

Defining Putaway Strategies

For locations that use bins, putaway strategies define where an item should be put away and prioritize zones that contain the storage bins NetSuite suggests in the inbound processing of orders. Putaway strategies also apply to the inventory transfer processes.

The sequence of your strategies determines which one takes priority over other applicable strategies. The criteria you define in your strategies enables NetSuite WMS to sort and select the bins for putting away items. For more information, see Putaway Strategies.

No limit applies as to the number of strategies you can create. However, you should define at least one putaway strategy for your warehouse location, with the top sequence number and default zone. As you add more strategies, the default strategy suggests the default bin when items do not match any of the additional strategies.

Your warehouse operations and business needs determine the number and definition of your required strategies. When defining your strategies, you should work in close consultation with your NetSuite account manager.

To define a putaway strategy:

1. Using the WMS Warehouse Manager role, go to WMS Configuration > Configure Strategies > WMS Putaway Strategies > New.
2. On the WMS Putaway Strategies page, enter or select values in the following fields:
    a. In the **Name** field, enter a unique name for the putaway strategy.
    b. If you want to create multiple strategies, in the **Sequence** field, enter a number that indicates the priority of this strategy.

        A strategy with a low sequence number takes priority over one with a high sequence number. For example, strategy A with a sequence number of 2 and strategy B with a sequence has a sequence number of 4 applies to item X. When you put away item X, NetSuite WMS suggests a bin in the zone defined in strategy A before a bin in the zone defined in strategy B.
    c. In the **Location** field, select a warehouse location.
    d. (Optional) In the **Zone** field, select the warehouse location's zone where you want to put away items that match the criteria.

        For more information about WMS Zones, see Creating Bin Locations or Carts.
3. (Optional) To set item criteria, select values in the item fields, such as **Item**, **Units**, **Class**, or **ABC Velocity**.

    These criteria are based on fields on the item record, except for the unit. The Units criteria applies to the transaction unit.

    On item records, you can set the ABC velocity in the **Inventory Classification** field. For more information about the item fields, see Creating Items for NetSuite WMS.
4. (Optional) If you use the Inventory Status feature, in the **Inventory Status** field, select a status.
5. Click **Save**.

Mobile Device Setup

NetSuite WMS leverages the mobility and convenience of mobile devices to process inbound, outbound, and inventory transactions and to post real-time updates to your NetSuite account.

Mobile Hardware and Software Requirements

For use with NetSuite WMS, refer to the following mobile device requirements:

- At least 256 MB flash memory
- Android 7.0 or higher – recommended for new devices

    Existing devices with previous Android OS versions, not earlier than Android 4.1, are still supported in the current NetSuite WMS version.

> **Note:** Devices that run on iOS are not supported.

- 1D bar code scanner

  For bar code requirements, see Bar Code Setup Requirements.
- 4 inch or larger touch screen
- 802.11a/b/g enabled
- Bluetooth enabled
- HTML 5 & JavaScript enabled browser (TLS 1.2 compliant)

  Only the Google Chrome browser is supported. You should use the latest version of Google Chrome.
- Interactive Sensor Technology (IST)
- Ruggedized or semi-ruggedized (optional)

Setup Procedures for NetSuite WMS Mobile Capabilities

Based on your business requirements, you can perform the following procedures to set up the NetSuite WMS mobile capabilities:

- Language Preference Setup for Mobile Applications
- Configuring Mobile App Settings
- Bar Code Setup for NetSuite WMS
- Mobile Printing for NetSuite WMS
- Mobile Device Configuration
- Mobile Device Customization

After you set up your mobile device, you can access the mobile app. See the help topic SCM Mobile App Access.

Language Preference Setup for Mobile Applications

If you use the Multi-Language feature, you can choose the language you want to apply to the pages and menu options within the NetSuite WMS mobile application. For more information about this feature, see the help topic Configuring Multiple Languages.

The following table contains the list of supported languages:

Language	**Language Code**	**Language**	**Language Code**
Chinese (Simplified)	zh_CN	Japanese	ja_JP
Chinese (Traditional)	zh_TW	Korean	ko_KR
Czech	cs_CZ	Norwegian	no_NO
Danish	da_DK	Portuguese (Brazil)	pt_BR
Dutch	nl_NL	Russian	ru_RU
English (U.S.)	en_US	Spanish	es_ES
Finnish	fi_FI	Spanish (Latin America)	es_AR
French	fr_FR	Swedish	sv_SE

Language	Language Code	Language	Language Code
French (Canada)	fr_CA	Thai	th_TH
German	de_DE	Turkish	tr_TR
Indonesian	id_ID	Vietnamese	vi_VN
Italian	it_IT		

To set your language preference for mobile applications, see the following topics:

- Adding Language Options for Mobile Application Translation
- Selecting and Applying a Language

Adding Language Options for Mobile Application Translation

Before you can apply your language preference to the mobile application interface, verify that you have added the language to your translation list.

To view the list of supported languages that you can choose from, see the help topic Choosing a Language for Your NetSuite User Interface. NetSuite WMS can translate text on the mobile application interface to any of these languages.

To add language options for mobile application translation:

1. Using the Administrator role, go to Setup > Company > General Preferences.
2. On the General Preferences page, click the **Languages** subtab, and then do the following:
    a. In the **Language** column, select the language.
    b. Click **Add**.
    Repeat steps a - b to add more language options for translation.
3. Click **Save**.
   After you have added the language options, you can update the mobile application.
4. To update the mobile application, do the following:
    a. Go to Setup > Custom > Mobile Applications.
    b. On the Mobile - Applications List, click **Update App**.

Your mobile application update might take a few minutes to complete. On the message at the top of the page, click the link to view the progress.

After adding the language to your list, you can set the language preference for your NetSuite WMS and mobile application interface. See Selecting and Applying a Language.

Selecting and Applying a Language

When you set your language preference for your NetSuite WMS user interface, you can also apply it to the mobile application interface.

To select and apply a language:

1. To select a language, using the Administrator role, go to Home > Set Preferences.
2. On the Set Preferences page, click the **General** subtab.
3. In the Localization section, in the **Language** field, select a language.
   After you have selected the language, you can apply it to the mobile application interface.

4. To apply the language to the mobile pages, go to Setup > Custom > Mobile - Applications.
5. On the Mobile - Applications List, click **View** next to the mobile application.
6. On the Mobile - Process List, click **Synchronize**.

Your language update might take a few minutes to complete. On the message at the top of the page, click the link to view the progress. You can access your mobile application after the update has been successfully completed.

Configuring Mobile App Settings

You can enable mobile printing capabilities and change default account settings for mobile apps. Account settings apply to the standard NetSuite WMS mobile app, as well as to other mobile apps that you use from the SCM Mobile SuiteApp.

If you enable mobile printing, the printing settings apply to both standard and custom mobile processes. You can specify which apps can access it. For more information about mobile printing, see Mobile Printing for NetSuite WMS.

If you use Pack Station, you can enable weighing scale support for packing items using a kiosk device. See the help topic Weighing Scale Support for Pack Station.

To configure mobile app settings:

1. Using the Mobile - Administrator role, go to Setup > Settings > Mobile Settings.

   The Mobile - Settings page appears.
2. (Optional) To enable printing, check the **Enable Mobile Printing** box, and then enter values in the following fields:

   > **Note:** Aside from printing through an SCM Mobile app, this setting also enables printing through the NetSuite UI, which is configured separately. For more information, see the help topic Configuring Printing Through SCM Mobile on NetSuite Pages.

   - **PrintNode URL for View Printers API** - In case PrintNode changes their default URL, enter the new PrintNode URL for the view printers API.

     This API enables you to retrieve the list of printers.
   - **PrintNode URL for Create Print Job API** - In case PrintNode changes their default URL, enter the new PrintNode URL for the create print job API.

     This API enables you to submit print requests.
   - **Print Server Connection Timeout** - Enter the maximum number of seconds that you want to enable NetSuite to establish a printer server connection before it times out.

     You cannot enter a negative value in this field.
   - **Printable File Retention (In Hours)** - Enter the maximum number of hours that you want printable files to remain in your file cabinet before they get deleted.

     You cannot enter a negative value in this field.

     You cannot reprint deleted files. For more information about reprinting, see Reprinting Labels.
   - **Enable for These Apps Only** - Select the SCM Mobile apps to which you want to provide Mobile Printing access, or you can select **None**

     This setting neither provides nor removes access to printing through the NetSuite UI.
3. (Optional) If you use Pack Station and you want to enable support for weighing scales, check the **Enable Weighing Scale Support** box.

4. (Optional) For your default account settings, enter or select values in any of the following fields:
   - Check the **Debug State** box if you want to set the mobile application to debug state and display state fields on mobile pages.
   - Check the **Always Allow App Selection** box to always display the application selection page on a mobile device, regardless if you have not configured multiple mobile applications.
   - To include empty and null values in the generated configuration file for the app, check the **Include Null Values in Configuration Files** box.

     If you clear this box to not include null field values, you decrease the configuration file size.
   - In the **Account Mode for Logging** field, select one of the following account modes in which you want to run the mobile app: **Production**, **Development**, or **Debug**.
   - In the **Batch Size of Logs for Storage (GB)** field, enter the batch size, in GB, that must be reached before NetSuite automatically transfers the logs for storage.
   - In the **Table Row Size** field, enter the default number of rows you want to display in a table at each mobile page load.
5. Click **Save**.
6. If you enable mobile printing or weighing scale support, be sure to begin a new session or reload the browser on your mobile device to view the updates.

Bar Code Setup for NetSuite WMS

You can set up item bar codes for scanning and mobile printing. You can scan the bar codes of items that you receive, store, or ship out of your warehouse.

Supported Bar Code Formats for NetSuite WMS

NetSuite WMS supports the following bar code types and formats to scan items:

- **Composite** - Linear (1D) and data matrix (2D)
- **GS1** - GS1-128 (1D) and GS1 DataMatrix (2D), with support for GTIN-14 (01)

The following table shows the mobile processes and bar code types supported by specific bar code scanning capabilities:

Capability	Bar Code Types	Mobile Process
Advanced bar code scanning	GS1 and composite	All
Tally scanning	GS1	For the processes supported by the Enable Tally Scanning rule, see System Rules for NetSuite WMS.
Bar code generation for label printing	GS1 DataMatrix only	Purchase order receiving Inbound shipment receiving Assembly build
Continuous scanning of lot or serialized items	GS1 and composite	Purchase order receiving (serial numbers only) Inbound shipment receiving Single or multiple order picking

For mobile printing, the generated bar codes contain only the following supported attributes or GS1 application identifiers: item, GTIN, quantity, unit of measure, lot number, expiry date, and serial number.

Custom mobile processes and custom application identifiers are not supported. For more information, see Mobile Printing for NetSuite WMS or Standard Labels for Mobile Printing.

Bar Code Scanning for Lot and Serialized Items

When you scan a GS1 or composite item bar code that includes a lot number, serial number, or quantity, the appropriate fields are automatically populated with these details. If the pick task has remaining quantity to be picked, you can scan the next lot or serial number. This behavior applies to all supported mobile processes when you scan item bar codes on the Enter Item page. See Supported Bar Code Formats for NetSuite WMS.

If you use the Tally Scanning rule and scan an item bar code that has a quantity, you can verify that the value in the Quantity field is equal to one. For lot items, if the value is greater than one, you can edit the field before you scan the next item or lot number. If the item bar codes have no quantity, the default quantity of one applies to each tally scan.

Bar Code Setup Requirements

Note the following browser and scanner requirements:

- For your browser, you should use Google Chrome. Other browsers may not be able to display FNC1 (Function Code One) characters from scanned bar codes. For mobile device requirements, see Mobile Device Setup.
- To scan GS1 bar codes, the scanner should be able to display FNC1 characters and the bar code symbol.

Bar Code Setup Procedures

To begin your bar code setup, you must activate the Enable Advanced Barcode Scanning? system rule. For each warehouse location, you can enable either a GS1 or Composite bar code, but not both. For instructions on activating system rules, see System Rules for NetSuite WMS.

After you activate the Advanced Barcode system rule, you can complete the following procedures depending on the bar code type you want to set up:

- To set up Composite bar code scanning, see Creating Composite Bar Code Templates.
- To set up GS1 bar codes, see Creating Item Aliases. If you want to set up your own GS1 application identifiers for bar code scanning, see Setting Up Custom Application Identifiers for GS1 Bar Code Scanning.

Creating Composite Bar Code Templates

You can scan composite bar codes of items that you receive in your warehouse. After a bar code has been initially scanned during the receiving process, you can reuse it to drive other warehouse processes. You can scan linear or data matrix composite bar codes for the following mobile processes:

- Bin Transfer
- Inventory Count
- Inventory Transfer
- Picking
- Putaway
- Receiving - RMA and Inbound Shipment Receiving are not supported.
- Replenishment

Create bar code templates to specify the bar code components and pad character for each item. You can associate a composite bar code template with multiple vendors.

NetSuite WMS provides standard bar code components mapped to NetSuite fields. When you scan a composite bar code, the corresponding fields on the mobile pages are populated automatically.

Before you create composite bar code templates, review the following guidelines:

- When you activate the Enable Advanced Barcode Sanning? rule, make sure that you set the process type to Composite. See Bar Code Setup Procedures.
- Do not use the pad character that you assign to a bar code in any part of the data you enter in a component field.

  For example, if you select **#** for the pad character and add the Item component to your bar code, do not use **#** as part of any item name, number, UPC, or alias.
- Composite bar code components have a fixed length that you can define in the index fields of your template.

  For example, you set an item component's length to 14 characters and your item data has less than 14 characters. Pad characters automatically fill out the remaining character spaces to reach your defined fixed length.
- If you include both the quantity and serial number components, each serial number must be unique. Make sure that the bar codes you generate for the item have a quantity value of 1.

To create a composite bar code template:

1. Using the WMS Warehouse Manager role, go to WMS Configuration > Configure Warehouse > Composite Bar Code Templates.
2. On the Composite Bar Code Template page, set values in the following fields:
   - In the **Bar Code Template Name** field, enter a unique name for the bar code template.
   - In the **Padding Character** field, select the character you want to use for padding.
3. On the **Bar Code Components** subtab, do the following:
   a. In the **Component** column, select the data you want to map for the bar code component:
      - **Item** – Item code, name, UPC, or item alias
      - **Expiry Date** – Expiry date of a lot-numbered item
      - **Lot** – Lot number
      - **UOM** – Item's unit of measure
      - **Quantity** – Item quantity
      - **Serial Number** – Serial number

      For more information about these item details, see the help topic Creating Item Records.
   b. In the **Starting Index** and **Ending Index** columns, define the component's length by specifying the index numbers that correspond to the component's first and last position in the bar code.

      For example, you can define a six-digit expiry date by entering a starting index of 2 and an ending index of 7.
   c. For lot-numbered items, in the **Date Format** column, select the format for expiry dates stored in a bar code.
   d. Click **Add** to add another component.
4. On the **Vendors** subtab, select the vendor's name, and then click **Add**.

   Repeat this step to add more vendors.

5. Click **Save**.

Setting Up Custom Application Identifiers for GS1 Bar Code Scanning

NetSuite WMS supports standard and custom GS1 application identifiers. When you scan an item bar code, fields on a mobile page are populated with data mapped to their corresponding standard or custom application identifiers.

> **Note:** GS1 item bar codes generated for labels printed from your mobile device do not support custom application identifiers. See Bar Code Setup for NetSuite WMS.

You can add custom application identifiers to custom mobile processes only. You can assign custom identifiers to fields that you have added to a mobile page of a custom process. Before you set up custom identifiers, make sure that you set the process type to GS1 for your Enable Advanced Barcode Scanning? system rule. For more information, see the following topics:

- To view the system rule, see System Rules for NetSuite WMS.
- To customize a mobile process, see Customizing Mobile Device Processes.
- To set up and view the limitations for custom fields, see Setting Up Additional Fields on Custom Mobile Pages.

Standard GS1 Application Identifiers

The following table shows the list of common standard application identifiers mapped to NetSuite fields:

AI	Description	Data Format	Data Title	Key
00	Serial Shipping Container Code (SSCC)		SSCC	sscc
01	Global Trade Item Number (GTIN)	14-digit number	GTIN	gtin
02	Global Trade Item Number (GTIN) of contained trade items	14-digit number	CONTENT	content
10	Batch or lot number	1 - 20 alphanumeric	BATCH/LOT	batch_lot
17	Expiration date (YYMMDD)	6 digits	USE BY OR EXPIRY	expiry_date
21	Serial number	1 - 20 alphanumeric	SERIAL	serial
30	Variable count of items (variable measure trade item)		VAR. COUNT(QUANTITY)	var_item_count

Custom GS1 Application Identifiers

The following table shows the list of custom application identifiers for your company's internal use, which you can map to other standard or custom fields on a mobile page:

AI	Description	Data Title	Key
91	Company internal information	Internal	company_internal_91
92	Company internal information	Internal	company_internal_92
93	Company internal information	Internal	company_internal_93

AI	Description	Data Title	Key
94	Company internal information	Internal	company_internal_94
95	Company internal information	Internal	company_internal_95
96	Company internal information	Internal	company_internal_96
97	Company internal information	Internal	company_internal_97
98	Company internal information	Internal	company_internal_98
99	Company internal information	Internal	company_internal_99

To view the complete list of supported application identifiers, click the link: Supported GS1 Application Identifiers.

To set up custom application identifiers for GS1 bar codes:

1. To access the button and field element for which you want to set up the custom application identifier, do the following:
   a. Using the Administrator role, go to Setup > Custom > Mobile - Applications.
   b. On the Mobile - Applications List, click **View** next to the mobile application.
   c. On the Mobile - Process List, click **View** next to the custom mobile process.
   d. On the Mobile - Process page, click the **Page** subtab, and then click the mobile page you want to configure.

      Note: You can set up custom application identifiers only on mobile pages that display the SCAN/ENTER ITEM textbox element. The button element on these pages use the Forward Form action on which you can enter the identifier's key, as described in step 2. Examples of these pages include the Enter Item page of the PO Receiving process and the Create Inventory page of the Create Inventory process.

   e. On the Mobile - Page page, click the **Page Elements** subtab that contains the list of page elements.
2. To set the custom application identifier key in the button element's Forward Form action, do the following:

   Note: The Forward Form action stores the value of the custom application identifier from the scanned bar code.

   a. On the **Page Elements** subtab, click the action button element that uses the Forward Form action you want to configure.

      By default, buttons with the **_nextBtn** suffix in the name use the Forward Form action.
   b. On the Mobile - Page Element page, in the **On Click Action** field, click the mobile action link.
   c. On the Mobile - Action page, click the **Output Parameters** subtab, and then click **New Mobile - Output Parameter**.

      Tip: In the **Type** field, you can verify that the Forward Form type is selected for the mobile action.

   d. On the Mobile - Output Parameter page, in the **Name** field, enter a unique name for the output parameter

e. In the **Response Key** field, enter the custom application identifier key in the following format: **response:**<key>.

   For example, to set up Application Identifier 91, enter **response:company_internal_91**.

   To view the list of keys for custom application identifiers, see Custom GS1 Application Identifiers.

f. In the **Destination Key** field, enter the custom application identifier key.

   For example, to set up Application Identifier 91, enter **company_internal_91**.

g. Click **Save**.

Repeat steps c to g if you want to add more custom application identifiers to your bar code.

3. To set the custom application identifier key in the custom or standard page element's **Default Value** field, do the following:

   > **Note:** The Default Value field is used to display the value of the custom application identifier from the scanned bar code.

   a. On the **Page Elements** subtab, click the custom or standard page element that you want to configure.

      > **Tip:** To access the Page Elements subtab of the mobile page on which you have set up the custom or standard page element, see step 1.

   b. On the Mobile - Page Element page, in the **Default Value** field, enter the custom application identifier key in the following format: **state:dataRecord:scriptParams:**<key>.

      For example, to set up Application Identifier 91, enter **state:dataRecord:scriptParams:company_internal_91**.

      To view the list of keys for custom application identifiers, see Custom GS1 Application Identifiers.

   c. Click **Save**.

   If you have multiple identifiers to set up, repeat steps a to c for each custom or standard page element.

4. After you have completed all of your customizations, you must update the mobile application by doing the following:

   a. Go to Setup > Custom > Mobile - Applications.

   b. On the Mobile - Applications List, click the **Update App** link next to the mobile application.

   To view the status of your update, click the link on the processing message at the top of the page. Wait for the confirmation message to appear before you start accessing your custom mobile page.

Mobile Printing for NetSuite WMS

Mobile printing enables you to send print requests online from your mobile device to your local printer. NetSuite WMS provides preconfigured label templates in PDF and ZPL format. Depending on the mobile process, you can print the following documents:

- Item and pallet labels for purchase order and inbound shipment receiving processes
- Item and pallet labels for the assembly build process for work orders
- Pick carton labels if you use pick cartons for the single or multi-order picking process

Note: You can enable pick carton label printing through the **Print pick carton labels?** system rule. For setup instructions, see System Rules for NetSuite WMS.

After you print a document, you can reprint it from the print logs on the mobile app or audit logs from the NetSuite WMS user interface.

NetSuite WMS and PrintNode Integration

NetSuite WMS integrates with PrintNode, a third party provider of hosted printing services. Through computers installed with the PrintNode client, PrintNode can access the printers set up on your computers. You can submit your mobile print requests through PrintNode, which manages the requests and routes them to the appropriate printers.

For more information about mobile printing, see the following topics:

- Mobile Printing Requirements and Setup
- Mobile Print Report Type, Mapping, and Rule Configuration
- Label Printing and Reprinting

Standard Labels for Mobile Printing

NetSuite WMS generates item, pallet, and pick carton labels from PDF or ZPL label templates. The PDF templates are set as the default for mobile printing.

Each label is available in the following template file formats:

- **Item label** - ItemLabelPDFTemplate.xml and ItemLabelZPLTemplate.txt
- **Pallet label** - PalletLabelPDFTemplate.xml and PalletLabelZPLTemplate.txt
- **Pick carton label** - CartonLabelPDFTemplate.xml and CartonLabelZPLTemplate.txt

The .XML files are used in the following advanced PDF templates:

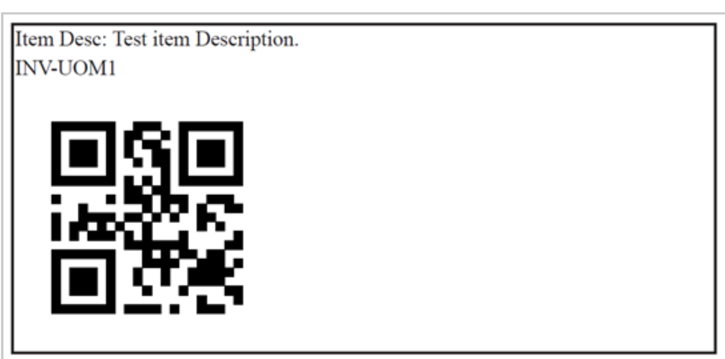
- Standard WMS Item Label PDF Template
- Standard WMS Pallet Label PDF Template

You can copy these advanced PDF templates and customize your copy according to your printing requirements.

The following images of sample PDF labels show the data displayed for a regular inventory item:

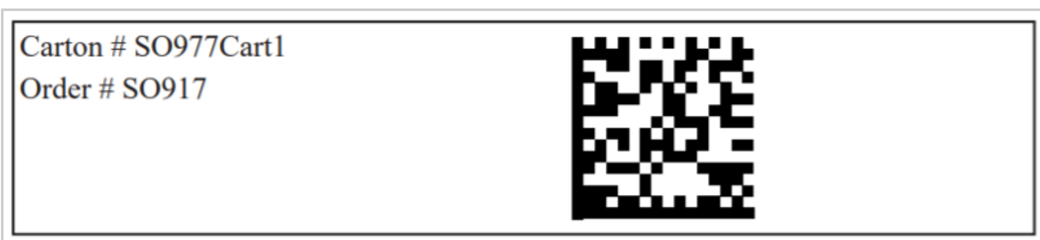
Note: Currently, the standard labels can display 2D DataMatrix bar code formats and select GS1 data only. For more information, see Bar Code Setup for NetSuite WMS.

- **Standard item label** - Displays the item name or number and item description.



- **Standard pallet label** - Displays these item and order details: item name or number, item description, quantity, receipt date, order transaction number, and the account holder's name.

- **Standard carton label** - Displays the pick carton number or ID and order number.



You can view the standard print templates files through the following paths, using the Administrator role:

- For the .XML or .TXT files, go to Documents > Files > File Cabinet. Access the files from the Templates folder of the Oracle NetSuite WMS Bundle folder through this path: SuiteBundles > Bundle <Oracle NetSuite WMS Bundle ID> > src > Templates.

  For more information about the bundle, see Installing the NetSuite WMS SuiteApps.
- For the advanced PDF templates, go to Customization > Forms > Advanced PDF/HTML Templates.

To view the standard PDF or ZPL print templates, using the Mobile Administrator role, you can go to Setup > Label Printing > Templates. You can create a copy of these standard item or pallet label templates. You can also create custom templates for your own print documents.

When you create you own template files, assign .XML template files to PDF print templates and .TXT template files to ZPL print templates. For more information about print templates and files, see Mobile Print Template and File Customization.

Mobile Printing Requirements and Setup

This section contains the topics for setup requirements and procedures to enable mobile printing.

Note: Mobile printing is set up and configured independently from the NetSuite WMS print driver and carrier application for the WMS Shipping Integration. You can use either or both based on your printing requirements. For more information, see NetSuite WMS Shipping Integration.

Mobile Printing Prerequisites

Before you set up mobile printing for NetSuite WMS, make sure that the following requirements are met:

- Active PrintNode account
- Valid PrintNode API key
- Printers configured for network printing
- Local computers installed and set up with the PrintNode client software

  The PrintNode client detects all the printers from your local computer and syncs them with their servers and your PrintNode account. From your PrintNode account, you can track and view the status of your printers.
- Advanced PDF/HTML Templates feature enabled on your NetSuite WMS account

  See Enabling Features for NetSuite WMS.
- Mobile Administrator role access

  See Warehouse Management Roles and Permissions.

For PrintNode requirements, you can visit the home page at https://www.printnode.com.

Mobile Printing Setup Procedures

Using the Mobile Administrator role, follow the setup procedures for mobile printing with NetSuite WMS:

1. Enabling Mobile Printing
2. Configuring Security Settings
3. Setting Up Your Printers
4. Configuring or Creating Print Report Types

Based on your business requirements, you can view the following topics for additional configurations or performing customizations:

- Configuring Printing Mappings and Rules
- Configuring Report Type Settings in Standard Mobile Processes

Enabling Mobile Printing

When you set up mobile printing, you enable the printing capability for the following mobile processes:

For NetSuite WMS:

- Purchase order receiving - See the help topic Receiving Orders.
- Inbound shipment receiving - See the help topic Receiving Inbound Shipment Orders.
- Building Assembly Items for a Work Order - Supports item label printing only.

For Pack Station:

- Packing for sales orders
- Packing for transfer orders

See the help topic Pack Station.

You also enable the option to configure mobile printing capabilities in custom mobile processes.

To enable mobile printing, using the Mobile Administrator role, go to Setup > Settings > Mobile Settings. After you enable mobile printing, be sure to update the mobile application. For detailed instructions, see Configuring Mobile App Settings.

To continue your setup, you must configure your print security settings, printers, and report type settings. For instructions, see the following topics in this section:

- Configuring Security Settings
- Setting Up Your Printers
- Configuring or Creating Print Report Types

Configuring Security Settings

Security settings apply to all the standard and label printers that you set up for mobile printing. These settings connect your NetSuite account with your PrintNode account. They also restrict access by allowing only safelisted printer IP addresses to connect with Oracle NetSuite.

Note the following guidelines when configuring your security settings:

- Before you can configure print security settings, make sure that you have a valid PrintNode API key and the IP addresses of your local computers installed with the PrintNode client. For more information, see Mobile Printing Prerequisites.
- If you use Pack Station and want to set up weighing scale support, you must safelist the IP addresses of computers used for your weighing scales. For more information, see the help topic Weighing Scale Support for Pack Station.

To configure security settings:

1. Go to Setup > Label Printing > Print API Key.
2. On the Print Security Settings page, add the IP Address of each computer installed with the PrintNode client.

   > **Tip:** You can view the list of available IP Addresses in the Logs tab of your PrintNode account.

   a. Click **Add IP Address**.
   b. On the Printer IP Address page, in the **IP Address** field, enter the computer's IP address that you want to safelist.
   c. Click **Add**.

      NetSuite redirects you to the Print Security Settings page.

   For each IP Address you want to add, repeat steps a to c.

   On the Print Security Settings page, the Printer IP Address section shows the list of safelisted IP addresses. If you want to remove an IP Address from the list, click **Delete IP Address**.
3. In the **Print API Key** field, enter the API Key for your PrintNode account.

   > **Tip:** In the message below the buttons, click the link to go to the PrintNode site and access your account to get the API Key.

4. Click **Submit API Key**.

Setting Up Your Printers

NetSuite creates a Printer record for each printer available on your local computers and connected through your PrintNode client. You must update each record to specify the printer type by classifying it as a report or standard document printer, or a label printer.

> **Important:** Do not create Printer records manually because they could be inactivated when Mobile Printing runs the printer sync job. Any records that do not match the printer details retrieved from PrintNode are automatically inactivated.

To set up your printers:

1. Go to Setup > Label Printing > Printers.
2. On the Print - Printers List, click **Edit** next to the printer you want to set up.

   > **Tip:** If you do not find your printer in the list, verify that you have safelisted the IP Address of the local computer associated with your printer. See Configuring Security Settings.

3. On the Print - Printers page, in the **Printer Type** field, select one of the following printer types:
   - **Report** - Standard document printer for PDF templates in .XML file format
   - **Label** - Label printer for ZPL templates in .TXT file format

   For more information about the standard labels, see Standard Labels for Mobile Printing.
4. Click **Save**.

After the printer setup, you can specify the default printer you want to use for your item or pallet label and configure other printing preferences. See Mobile Print Report Type, Mapping, and Rule Configuration.

Mobile Print Report Type, Mapping, and Rule Configuration

You can set your printing preferences for the standard item and pallet label report types, as well as for your own print report types. You can create rules to add criteria to your default settings.

See the following mobile printing configuration topics:

- Configuring or Creating Print Report Types
- Configuring Printing Mappings and Rules
- Configuring Report Type Settings in Standard Mobile Processes

Mobile Printing Standard Source Record and Fields

The default source record, WMS Auto Printing Rule Evaluation Data, used by the standard report types contains the item and transaction fields preconfigured in the standard label print templates. The print template of a report type is populated with data from fields of the source record. You can use the same fields to add print rules to report types. Mobile printing evaluates the rules and generates the actual label with populated fields from the print template.

When you create your own print template, you can configure the item and transaction fields for standard and custom mobile processes. The default source record also contains custom fields, which you can configure for custom mobile processes only.

To view the default source record and fields, using the Administrator role, go to Customization > Lists, Records, & Fields > Record Types. On the Record Types page, click the **WMS Auto Printing Rule Evaluation Data** link.

The following table shows the list of standard source fields that are preconfigured in standard and custom mobile processes:

Description	ID	Type
User	custrecord_wms_user	List/Record
Item	custrecord_wms_item	Free-Form Text
Item Quantity	custrecord_wms_item_qty	Long Text
Location	custrecord_wms_ext_location	List/Record
Item Description	custrecord_wms_item_desc	Free-Form Text
Task Type	custrecord_wms_tasktype	List/Record
Item Group	custrecord_wms_item_group	List/Record
Item Family	custrecord_wms_item_family	List/Record
Customer	custrecord_wms_customer	List/Record
Notes	custrecord_wms_notes	Free-Form Text
Units Type	custrecord_wms_uom	List/Record
Transaction Number	custrecord_wms_tran_num	List/Record
Transaction Type	custrecord_wms_tran_type	List/Record
Transaction Date	custrecord_wms_tran_date	Date
Inbound Shipment	custrecord_wms_inbshipment	List/Record
Lot #	custrecord_wms_lot_num	Free-Form Text
Lot Expiry Date	custrecord_wms_lot_exp_date	Date

The following table shows the list of custom source fields that you can configure in custom mobile processes only:

Description	ID	Type
User Field 1	custrecord_wms_user_field_1	Free-Form Text
User Field 2	custrecord_wms_user_field_2	Free-Form Text
User Field 3	custrecord_wms_user_field_3	Free-Form Text
User Field 4	custrecord_wms_user_field_4	Free-Form Text
User Field 5	custrecord_wms_user_field_5	Free-Form Text
User Field 6	custrecord_wms_user_field_6	Free-Form Text
User Field 7	custrecord_wms_user_field_7	Free-Form Text
User Field 8	custrecord_wms_user_field_8	Free-Form Text
User Field 9	custrecord_wms_user_field_9	Free-Form Text
User Field 10	custrecord_wms_user_field_10	Free-Form Text

You can set up standard or custom source fields for your report types, print action, and template files. For instructions, see the following topics:

- Configuring Printing Mappings and Rules
- Setting Up Source Fields in Print Actions
- Mobile Print Template and File Customization

Configuring or Creating Print Report Types

The PDF print template is preconfigured in the standard item and pallet label report types, along with other printing settings. You can change the default printing settings for each report type. Before submitting a print request from a mobile device, you can also change your settings, except for automatically printed labels or documents. For more information about the automatic setting for mobile printing, see Configuring Report Type Settings in Standard Mobile Processes.

Instead of using the standard item or pallet label report types, you can create your own print report type for a custom mobile process. For example, you can create a report type for a case label. You can assign your own print template, as well as specify other printing settings and rules.

You can set up custom report types in custom mobile processes only. For standard report types, your settings determine whether or not you can use the report type in a standard mobile process, custom mobile process, or both. The following table describes the standard report type settings you can use for one or both types of mobile processes.

Settings or Configurations on Standard Report Types	Supported in Standard Mobile Processes? *	Supported in Custom Mobile Processes?
Standard report type	Yes	Yes
Custom report type	No	Yes
Default source record	Yes	Yes
Other source record or saved search	No, because fields from other source records are not preconfigured on the pages of standard mobile processes.	Yes, because you can manually configure the fields on the pages of a custom mobile process.
Standard item or pallet label template	Yes, only if the standard template uses the standard source fields.	Yes. Regardless if you use a standard or custom template, you can manually configure the standard and custom source fields, or fields from a different source record.
Custom item or pallet label template	Yes, only if the custom template uses the standard source fields.	
Standard source fields for print mappings	Yes	Yes
Custom source fields for print mappings	No, because the custom source fields are not preconfigured on the pages of standard mobile processes.	Yes, because you can manually configure custom source fields in a custom mobile process.
***** To view the list of supported standard mobile processes, see Mobile Printing for NetSuite WMS.		

To configure or create print report types:

1. Using the Mobile – Administrator role, go to Setup > Label Printing > Report Types.
2. On the Report Type List, click **Edit** next to an existing report type or click **New Report Type** to create a custom report type.

3. On the Report Type page, enter or select values in the following fields:
   - For custom report types, in the **Report Type** field, enter a name for the label or print document.
   - In the **Source Record ID** field, enter the ID of the source record or saved search that contains the data you want to use for your print template, mapping, and rules.

     You can enter the default source record ID, **customrecord_wms_rule_evaluatn_autoprint**. This record contains preconfigured standard fields, as well as additional fields that you can configure according to your printing requirements. For more information about the source record, see Mobile Printing Standard Source Record and Fields.
   - For custom report types, in the **Default Printer Type** field, select one of the following printer types you want to assign to your report type:

     > **Note:** After saving your new custom report type, you cannot change the default printer type.

     - **Label** - Label printer for ZPL files
     - **Report** - Standard document printer
   - In the **Default Printer** field, select the default printer you want to assign to this report type.

     This dropdown list displays only the printers that belong to your selected printer type. If you do not find your printer in the list, verify that it has the correct printer type. See Setting Up Your Printers.
   - In the **Default Template** field, select the default ZPL or PDF print template for your report type.

     You can select a standard or custom print template. For more information about custom print templates, see Mobile Print Template and File Customization.
   - In the **Default Number of Copies** field, enter a number greater than zero for the copies you want to print by default.
4. Click **Save**.

After you have configured your default report type settings, you can create rules if you want to add location or item specific settings. For more information about printing rules, see Configuring Printing Mappings and Rules.

Configuring Printing Mappings and Rules

To suit your business requirements, you can add criteria-based rules to your report type settings. Create print mappings that enable you to define the criteria for your rules. Then, create the rules using one or more mappings. For each report type, you can create multiple mappings and rules for printers, templates, and number of copies.

NetSuite WMS evaluates and applies printing rules when you submit print requests from a mobile device. If no rule applies to your print request, it uses your default report type settings. For more information about default settings, see Configuring or Creating Print Report Types.

For example, you can add print rules to locations and rules for templates or number of copies to items. See the following sample cases for creating print rules:

- Create a printer rule to use a specific printer for a warehouse location
- Create a template rule to use a specific template for all items except for Item A
- Create a number of copies rule to print copies equal to twice the quantity value of Item A

For these sample cases, NetSuite WMS applies the rule to a print request that matches the rule's location or item criteria. Multiple rules that you add to a preference are evaluated based on the evaluation order number that you assign to each rule.

To configure printing mappings and rules:

1. Using the Mobile – Administrator role, go to Setup > Label Printing > Report Types.
2. On the Report Type List, click **Edit** next to the item or pallet label you want to configure.

   The Report Type page appears.
3. To configure a mapping, click the **Mappings** subtab, and then do the following:
   a. Click the subtab for the mapping you want to create: **Printers**, **Templates**, or **Number of Copies**.
   b. Click **Add Mapping**.
   c. On the Mapping popup window, enter or select values in the following fields for each mapping:
      - In the **Source Field ID** field, enter the ID of the field you want to define in your criteria.

        Choose a field that belongs to the source record associated with the report type. If you use the default source record, you can choose a standard or custom source field.

        For example, to define a location criteria using the default source field, enter **custrecord_wms_ext_location.**

        To view the list of default source fields and IDs, see Mobile Printing Standard Source Record and Fields.

        > **Note:** If you assign a custom source field to your mapping for a custom mobile process, you must also configure the required mobile action. See Setting Up Source Fields in Print Actions.

      - In the **Source Field Type** field, select one of the following types for your source field:
        - **Text -** For List/Record fields
        - **Value -** For fields other than a List/Record

        To view the list of default source fields and types, see Mobile Printing Standard Source Record and Fields.
      - In the **Entity Type** field, select the entity type of the source field.

        For example, to define a location criteria in your mapping, select **Location** as your entity type.
   d. Click **Save**.
4. To configure a rule, click the **Rules** subtab, and then do the following:
   a. Click the subtab for the rule you want to define: **Printers**, **Templates**, or **Number of Copies**.
   b. Click **Add Rule**.
   c. On the Rule popup window, select values in the following fields for each rule:
      - In the **Operator** field, select the operator you want to use for your criteria.
      - In the **Value** field, select the specific value from the source field that you want to use for your criteria.
      - In the **Evaluation Order** field, enter a number greater than 0 that indicates the rule's evaluation order.

        > **Tip:** If you want to add multiple rules, enter **1** for the first rule you want to evaluate.

      - In the **Printer**, **Template**, or **Number of Copies** field, select a value in one of the following fields based on the rule you want to define:

- **Printer** - Name of the printer
- **Template** - Filename of the template
- **Number of Copies** - Number greater than 0 for the copies you want to print

  You can also enter an expression that evaluates to the number of copies, or the ID of a numeric field that contains the value of the number of copies.

d. Click **Apply**.

5. After you have configured your mappings and rules, click **Save**.

Configuring Report Type Settings in Standard Mobile Processes

NetSuite WMS provides the Required and Automatic printing settings for the standard item and pallet label print reports. You can configure these settings in the standard PO receiving or inbound shipment receiving mobile process. These processes contain the Enter Quantity pages that display the default print button element on which you can apply the printing settings. These settings enable restrictions or additional mobile printing capabilities.

For example, you can set the standard item label to required printing for the standard PO receiving process. On the Print page of the process, you will not have the option to skip item label printing.

If you want to configure these printing settings in custom mobile processes, see Configuring Report Type Settings in Custom Mobile Processes.

Standard Processes, Pages, and Page Elements with Mobile Printing

The following table shows the default pages and page elements configured for mobile printing:

Mobile Process	Mobile Page	Mobile Page Element
NSWMS_POReceiving	page_poReceiving_enterLotQuantity	poReceiving_enterLotQuantity_printBtn
	page_poReceiving_quantityScan	poReceiving_quantityScan_PrintLabelBtn
NSWMS_InboundShipmentReceiving	page_inbShipmentRec_quantityScan	inbShipmentRec_quantityScan_printBtn

To configure printing settings for standard mobile processes:

1. Using the Mobile – Administrator role, go to Setup > Configuration > Applications.
2. On the Mobile - Applications List, click **View** next to the mobile application.
3. On the Mobile - Process List, click **Configure** next to the NSWMS_POReceiving or NSWMS_InboundShipmentReceiving process.
4. On the Mobile Configuration page, in the **Page** field, select the Enter Quantity page that contains the print button.

   For the list of standard pages that contain a print button, see Standard Processes, Pages, and Page Elements with Mobile Printing.
5. On the **Page Element** subtab, in the **Element** field, select the Action Button page element.

   For the list of standard page elements that you can configure, see Standard Processes, Pages, and Page Elements with Mobile Printing.
6. For settings specific to printing, in the Action Settings section, do any of the following:
   - In the **Report Type** field, select one of the standard report types you want to configure: **WMS-Item label** or **WMS-Pallet label**.

Custom report types do not appear in the dropdown list. You can set up custom report types in custom mobile processes only. See Customizing Mobile Processes to Configure Printing.

- If you want to inactivate this report type for the mobile page, check the **Inactive** box.

  When you inactivate the report type associated with a label or print document, you cannot print the document from a mobile device.

- If you want to require the label or other document to be printed from the mobile page of the standard process, check the **Required** box.

  This setting hides the Skip button from the Print mobile page.

- If you want to automatically print the label or other document from the mobile page of the standard process, check the **Automatic** box.

  This setting hides the Print mobile page and automatically submits print requests in the backend. Mobile printing uses your default report type settings for printers, templates, and number of copies. To view or update these settings, see Configuring or Creating Print Report Types.

7. Click **Save**.

Mobile Printing Customization

You can extend mobile printing support to custom mobile processes. On a custom mobile process, you can enable the Print button and page to submit print requests from your mobile device. You can also perform customizations such as adding your own print report types or displaying additional fields on labels.

Before you can perform mobile printing customizations, be sure that you have cloned the standard mobile process you want to customize. See Customizing Mobile Device Processes.

Before you can add new print report types to your custom process, make sure that you have already created your custom report types. See Configuring or Creating Print Report Types.

See the following mobile printing customization topics:

- Customizing Mobile Processes to Configure Printing
- Mobile Print Template and File Customization

Customizing Mobile Processes to Configure Printing

Mobile printing is available on the Enter Quantity pages of the purchase order and inbound shipment receiving processes. When you customize these standard processes, you carry over the default mobile printing settings and configuration on these pages. You can change the default settings, such as using a custom report type that has a custom print template, source record, or custom source fields.

You can customize other standard processes to add the mobile printing capability. You can also manually configure mobile printing for other pages of the purchase order or inbound shipment receiving processes. To configure printing in a custom mobile process, add the print button element to the mobile page, and then configure the print actions and print report type settings.

Before you perform mobile printing customizations, be sure that you have cloned the mobile process and created the report types or templates that you want to set up in the custom mobile process. For more information, see the following topics:

- Customizing Mobile Device Processes
- Mobile Print Report Type, Mapping, and Rule Configuration

- Mobile Print Template and File Customization

To customize mobile processes to configure printing:

1. Access the mobile page on which you want to display or update a print button.
    a. Using the Mobile – Administrator role, go to Setup > Configuration > Applications.
    b. On the Mobile - Applications List, click **View** next to the mobile application.
    c. On the Mobile - Process List, click **View** next to the custom mobile process.
    d. On the Mobile - Process page, click the **Pages** subtab, and then click the mobile page you want to configure.

       To view the list of default pages with mobile printing, see Standard Processes, Pages, and Page Elements with Mobile Printing.
2. On the Mobile - Page page, click the **Page Elements** subtab, and then do one of the following:
    - To update an existing print button element, click the **Edit** link next to the Action Button element.

      To view the list of default page elements with mobile printing, see Standard Processes, Pages, and Page Elements with Mobile Printing.
    - To add a print button to the page, click **New Mobile - Page Element**.
3. To configure a print button, see Adding or Updating a Print Button in Custom Mobile Processes.

   > **Note:** If you have an existing print button element, you can skip this step unless you want to change the button label.
4. To configure the print action of the print button element, you can do one of the following

   > **Note:** If you do not want to change the default print action or set up custom fields for a template file, you can skip this step. For more information about template files, see the help topic Mobile Print Template and File Customization.

    - To configure custom source fields that you want to add to your print template file, see Setting Up Source Fields in Print Actions.
    - For a custom PO receiving or inbound shipment process, you can select the default print action, **poReceiving_quantityScan_PrintLabelBtn_click** or **inbShipmentRec_quantityScan_printBtnClick**, respectively.
    - Assign your own print action for the button element. For more information about mobile actions, see Configuring Actions for Custom Mobile Processes.
5. To configure settings for new report types, automatic printing, or required printing, see Configuring Report Type Settings in Custom Mobile Processes.
6. Update the mobile application to compile your customizations.

   After you complete all customizations, you must update the mobile application.
    a. Go to Setup > Custom > Mobile - Applications.
    b. On the Mobile - Applications List, click the **Update App** link next to the mobile application.

   To view the status of your update, click the link on the processing message at the top of the page. Wait for the confirmation message to appear before you start accessing your custom mobile page.

Adding or Updating a Print Button in Custom Mobile Processes

In a custom mobile process, you can add the print button to a page by creating an Action Button page element. You can also update an existing print button.

To add or update a print button in a custom mobile process:

1. On a Mobile - Page Element page, enter or select values in the following fields:
   - In the **Name** field, enter a unique name for the button element.
   - To add a print button, in the **Type** field, select **Action Button**
   - In the **Label** field, select the field label you want to appear on the mobile page.

     Tip: To add a label, click the new + icon.
2. You can do the following configurations for the Action Button element:
   - To configure other fields for your print button element, see Configuring Page Elements for Mobile Device Processes.
   - To configure source fields that you have added to your print template files, see Setting Up Source Fields in Print Actions.
3. Click **Save**.
4. If you have completed all your customizations, you must compile your updates. See step 6 of the instructions in the topic, Customizing Mobile Processes to Configure Printing.

Setting Up Source Fields in Print Actions

For custom mobile processes, you can set up the source fields available in the default source record. You must set up these fields in the Before Print Action of the print button's mobile action. For more information about the default source field, see Mobile Printing Standard Source Record and Fields.

Note the following guidelines for configuring custom source fields:

- For custom mobile processes, you must set up any custom source fields used in your print template files.
- For pages of custom mobile processes that do not have the default mobile printing capability, you must also set up any standard source fields used in your print template files. For the Enter Quantity pages of custom purchase order or inbound shipment receiving processes that already have the default mobile printing capability, you do not have to set up the standard source fields.
- Configure the custom source fields that you have assigned to your printing mappings or added to your print template file. See Configuring Printing Mappings and Rules or Mobile Print Template and File Customization.
- If you want to associate your custom source field with a field that does not appear on any mobile pages of the process, you must first add the field to a mobile page. See Setting Up Additional Fields on Custom Mobile Pages.

To set up source fields in print actions:

1. On the Mobile - Page Element page of the print button, do one of the following:
   - To add a print action, point to the right of the **On Click Action** field, and then click the new + icon.
   - To configure custom source fields for a custom PO receiving or inbound shipment process, click the existing action link. Proceed to step 4 to add and set up the fields.
2. To configure your new print action settings, on the Mobile - Action page, do the following
   a. Enter or select values in the following fields:
      - In the **Name** field, enter a unique name for the print action.

- In the **Type** field, select **Print**.
- In the **Before Print Action**, select the restlet action you want to use for mobile printing.

  For a custom PO receiving or inbound shipment process, you can select the default print action, **poReceiving_quantityScan_beforePrintActn** or **inbShipmentRec_quantityScan_beforePrintActn**, respectively.

  The default restlets for this mobile action retrieve and store the data used to evaluate print rules and generate labels.

  If you want to assign your own restlet action, see Configuring Actions for Custom Mobile Processes.

b. Click **Save**.

3. On the Mobile - Action page, in the **Before Print Action** field, click the action link.
4. On the **Input Parameters** subtab, click **New Mobile - Input Parameter**.
5. On the Mobile - Input Parameter page, enter values in the following fields:
   - In the **Name** field, enter a unique name for the mobile action's input parameter.
   - In the **Key** field, enter the key of the custom source field.

     To view the list of custom source field keys, see Mobile Printing Standard Source Record and Fields.
   - In the **Value** field, enter the state path and key for the field that contains the value or data you want to associate with the custom source field. You can also retrieve a value from a page or set up a constant. See the following examples:
     - Configure an item's vendor by entering the value using the default state path and vendor name key, as follows: **state:dataRecord:scriptParams:vendorName**.

       You can view the state path and keys of a mobile page from the Developer Tools UI of a browser. To access this UI on a Chrome browser, right-click on any area of the mobile page that contains the field, and then from the popup menu, click **Inspect**. From the UI's toolbar, click **Application.** On the left Application panel, under the Storage heading, expand Local Storage, and then click your NetSuite account URL. On the right Application panel, in the **Key** column, click **psg-mobile-state**. At the bottom of the panel, expand dataRecord > scriptParams, following the default state path in the example. From the list of key-value pairs, you can choose the key for the field you want to associate with the custom source field.
     - Configure the item quantity by entering the value using the page element field, as follows: **page:poReceiving_enterLotQuantity_enterQtyUOM:custom:value**
     - Configure the purchase order number by entering the value using a constant, as follows: **constant:purchaseorder**.
6. Click **Save**.

   Repeat steps 5 to 6 if you want to configure more source fields.
7. For mobile pages that do not have the default mobile printing capability, you must set up an output parameter.

   a. On the **Output Parameters** subtab, click **New Mobile – Output Parameter**.

   b. On the Output Parameter page, enter values in the following fields:
   - In the **Name** field, enter a unique name for the output parameter.
   - In the **Response Key**, enter the default response key setting: **response:id**.

     This default setting has the required keyword, **response**, followed by the key that contains the input parameter values passed by the Before Print Action restlet.
   - In the **Destination Key**, enter the default destination key setting: **sourceId**.

The destination key stores the values from the Before Print Action restlet's response. This key corresponds to the Source Row ID field setting of your report types. See Configuring Report Type Settings in Custom Mobile Processes.

c. Click **Save**.

8. If you have completed all your customizations, you must compile your updates. See step 6 of the instructions in the topic, Customizing Mobile Processes to Configure Printing.

Configuring Report Type Settings in Custom Mobile Processes

On a mobile page of a custom process, you can add one or more report types associated with the labels that you want to print. NetSuite WMS prints the labels in sequence according to print sequence number that you assign to each report type.

Print report settings enable you to configure automatic or required printing in custom mobile processes. You can configure these settings to each standard or custom report type. For more information about report types, see Mobile Print Report Type, Mapping, and Rule Configuration.

If you want to configure print report settings in standard mobile processes, see Configuring Report Type Settings in Standard Mobile Processes.

To configure print report setting in custom mobile processes:

1. On the Mobile - Page Element page, point to the right of the **On Click Action** field, and then click the icon.

   Tip: In view mode, click the action link in the field to open the Mobile - Action page.

2. On the Mobile - Action page, click the **Print Reports** subtab, and then click **New Mobile - Print Reports** or click **Edit** next to an existing report type.
3. On the Mobile - Print Reports page, enter or select details in the following fields:

Field Name	Description
Report Type	Select the report type that contains the print template and other default printing settings that you want to associate with the print action. You can select the standard report types for item label or pallet labels, or your custom report type. For more information about report types, see Mobile Print Report Type, Mapping, and Rule Configuration.
Source Row ID	Enter the internal ID of the specific row from the source record or saved search that contains the data you want to use to evaluate print rules and generate your label. For more information about print rules, see Configuring Printing Mappings and Rules. If you use the default source record, you can enter the default setting for this field, **{{state:dataRecord:scriptParams:sourceId}}**, which shows the state path and key for the source row ID. This is the path for the destination key of the output parameter that stores the data for your print template and rule evaluation. For more information about output parameters, see Setting Up Source Fields in Print Actions. For more information about the default source record, see Mobile Printing Standard Source Record and Fields. **Note:** If you want to associate multiple report types with a single print button, you must configure them to use the same source row ID.
Get Print File Path Action	Select the restlet mobile action that contains the path to the print template associated with the report type. For a custom PO receiving or inbound shipment process, you can select the default restlet for the standard item or pallet label report type. For custom report types, you can select the default restlet, **wms_invokePrint_Action**.

Field Name	Description
	The default restlets retrieve the print template and the stored data from the source row ID. It evaluates any rules associated with your print report and generates the actual label that you can submit for printing. If you want to create your own restlet action, see Configuring Actions for Custom Mobile Processes.
Automatic	Check this box if you want to automatically print the label or document from the mobile page of a custom process. This setting hides the Print mobile page and automatically submits print requests in the backend. Mobile printing uses your default printing preferences for printers, templates, and number of copies. To view or set your printing preferences, see Configuring or Creating Print Report Types.
Required	Check this box if you want to require the label or document to be printed from the mobile page of a custom process. This setting hides the Skip button from the Print mobile page.
Print Sequence	Enter the sequence number you want to assign to the label or document. NetSuite WMS processes print requests according to the print sequence number, in ascending order.
Description	Enter a description for the print report. This description is included in the audit entry record that lists the status of all mobile print and reprint requests.

4. Click **Save**.
5. If you have completed all your customizations, you must compile your updates. See step 6 of the instructions in the topic, Customizing Mobile Processes to Configure Printing.

Mobile Print Template and File Customization

You can copy the standard print templates and files on which you can perform your customizations. You can also create a template or template file for a new document that you want to print. For more information about the standard labels, see Standard Labels for Mobile Printing.

Important: Do not customize the default templates and template files directly. Customizations on the default templates and template files are overridden during bundle upgrades.

When you create your custom print template, you can obtain data from records or saved searches. Choose a record to use the data from header or body fields. If you want to use sublist data, choose a saved search as your source.

Note the following guidelines when adding fields to template files:

- In your copy of a standard template file or in a new template file, you can add the standard fields of a standard source record. You can set up the template and template file in a standard or custom mobile process.
- In a template file, you can add the custom fields of a standard source record. For this case, however, you can set up the template and template file in a custom mobile process only.
- Make sure that you add fields that belong to the source record configured in the print report to which you want to associate the print template.
- If you want to set up fields that do not appear on a mobile page, you must first add them to a page of a custom mobile process. See Setting Up Additional Fields on Custom Mobile Pages.

For more information about standard source records, see the help topic Standard Source Records and Print Report Types. To view sample labels generated from standard template files, see Standard Labels for Mobile Printing or Mobile Printing for Pack Station.

The following instructions show you how to copy or upload print templates or template files:

- To copy TXT and ZPL template files and upload them to your file cabinet, see Adding or Copying a Mobile Print Template File.
- To copy Advanced PDF print template files, see Creating Custom Advanced PDF Templates.
- To create or copy a print template, see Creating or Copying a Mobile Print Template.

Adding or Copying a Mobile Print Template File

In your file cabinet, you can access the XML files for PDF print templates or TXT files for ZPL print templates. You can copy the files you want to customize. On your file copy, you can add the fields you want to print, or hide them.

For custom mobile processes, you can configure custom source fields from a standard source record.

For example, you want to display the item's vendor on the item label in ZPL format. Copy the ZPL template file, and then, using the ZPL template editor of your choice, add a line to display the vendor name. You can assign the custom source field, User Field 1, to the vendor name by configuring its ID in the template file. To do so, insert the following string in the new line, after the field label: `${record.custrecord_wms_user_field_1}`.

For guidelines on template file customization, see Mobile Print Template and File Customization.

To add or copy a mobile print template file:

1. Using the Mobile Administrator role, go to Documents > Files > File Cabinet.
2. On the File Cabinet page, on the navigation panel, access the Templates folder of the SCM Mobile Bundle folder from the following path: SuiteBundles > Bundle (ID) > src > Templates.
3. Do one of the following:
   - To save your template file in the file cabinet, click **Add File**.
   - To copy a standard ZPL or PDF template file, click **Copy Files**. On the Folder Contents page, check the box next to the file, and then click **Copy**.

   > **Note:** For PDF template files, instead of directly copying the default .XML file from the file cabinet, you can copy and customize the default advanced PDF template files. See Creating Custom Advanced PDF Templates.

   After you complete your updates, repeat steps 1 to 3 to save your updated file in your file cabinet.

To assign your template file to a print template, see Creating or Copying a Mobile Print Template. If you include custom source fields in your template, you must also configure them in the print action of a custom mobile page. See Customizing Mobile Processes to Configure Printing.

Creating Custom Advanced PDF Templates

You can create a copy of the Advanced PDF template file of an item or pallet label, which you can customize instead of its raw XML file. On your copy of the file, you can use the Source Code editor to add or hide fields.

On your copy of a PDF template, you can perform customizations according to your business requirements. For custom mobile processes, you can also configure the custom source fields to display additional details on your label.

For example, you want to display the item's vendor on your item label. On your copy of the advanced PDF template for the item label, add a row for the vendor name, and then configure the ID of the custom source field you want associate with the vendor name.

For guidelines on template file customization, see Mobile Print Template and File Customization.

To create custom advanced PDF templates:

1. Using the Administrator role, go to Customization > Forms > Advanced PDF/HTML Templates.
2. On the Advanced PDF/HTML Templates page, click **Edit** next to the PDF template you want to create.
3. On the Advanced PDF/HTML Template page, click **Template Setup**.
4. On the Template Setup popup window, do the following:
    a. in the **Title** field, replace the default name with the name you want to assign to your template.

    > **Important:** To ensure that you do not override the default template, you must change the default template title before saving your copy.

    b. Click **Save** to save the title and close the popup window.
5. On the Advanced PDF/HTML Template page, click **Save As**.
6. (Optional) You can edit your own custom advanced PDF template to configure custom source fields that you want to display on your labels.

    > **Note:** You can configure custom source fields using the Source Code editor of advanced templates. On the Advanced PDF/HTML Template page, on the toolbar, make sure that the **Source Code** toggle is switched on.

    On an existing row or a new one, you can configure a custom source field by adding its label and inserting its ID in the following string: **${record.**<custom source field ID>**}**.

    The following example shows a row that displays the vendor name below the item description. The vendor name is configured using the ID of the custom source field, User Field 1:

    ```
    <table border="0" cellpadding="1" cellspacing="1" style="width:400px;">
    <tr>
    <td>Item Desc: ${record.custrecord_wms_item_desc}</td>
    </tr>
    <tr>
      <td>Vendor Name: ${record.custrecord_wms_user_field_1}</td>
    </tr>
    ```

    To view the list of standard and custom source fields, see Mobile Printing Standard Source Record and Fields. For more information about source code editing, see the help topic Source Code Editing to Customize Advanced Templates.
7. (Optional) You can perform other customizations for your item or pallet label, such as changing the style and layout or hiding fields. See the help topic Advanced Templates Customization in the Template Editor.
8. To view your template updates, click **Preview**.

After creating your custom advanced PDF template, you must save it to your file cabinet and assign it to your custom print template. See Adding or Copying a Mobile Print Template File and Creating or Copying a Mobile Print Template.

If you include custom source fields in your template, you must also configure them in the print action of a custom mobile page. See Customizing Mobile Processes to Configure Printing.

Creating or Copying a Mobile Print Template

When you create and upload a custom print template file, you must associate it with a new print template or a copy of an existing one.

To create or copy a mobile print template:

1. Using the Mobile Administrator role, access a standard or new mobile print template by doing either of the following:
   - To access a standard template, go to Setup > Label Printing > Templates. On the Print - Templates List, click **View** next to the standard template you want to copy. On the Print - Template page, point to the Actions sublist, and then click **Make Copy**.
   - To access a new template, go to Setup > Label Printing > Templates > New.
2. On the Print - Template page, enter values in the following fields:
   a. In the **Name** field, enter a unique name for the print template.
   b. In the **Print Template Path** field, enter the default path for mobile print templates, **~/src/Templates/**, followed by your print template filename.

      Take for example the path for the standard item label PDF template: ~/src/Templates/ItemLabelPDFTemplate.xml.

      For more information about print template files, see Standard Labels for Mobile Printing or Mobile Printing for Pack Station.
   c. Click **Save**.

You must assign your new print template to a standard or custom report type. See Mobile Print Report Type, Mapping, and Rule Configuration.

Mobile Device Configuration

Mobile device configuration enables you to make minor changes to the standard mobile device processes available with NetSuite WMS. Each process has component pages and each page has component elements and actions.

You can use the NetSuite WMS interface to configure these standard mobile processes, pages, and elements to your business needs. For example, you can change the default number of rows that appear in a table on mobile device screens.

You can also configure the mobile device actions of your custom process. For more information about custom processes, see Mobile Device Customization.

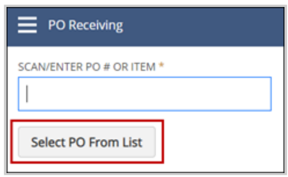
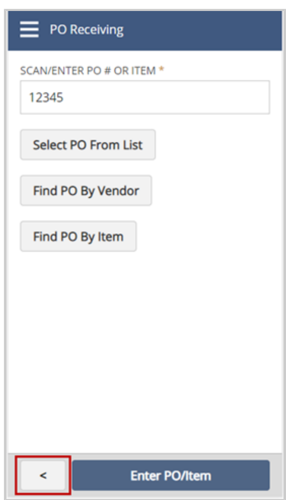
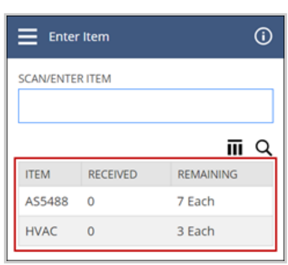
You can configure the following mobile processes and pages:

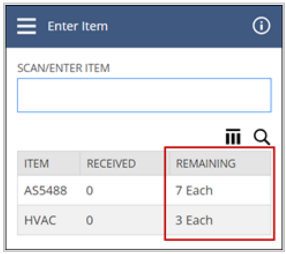
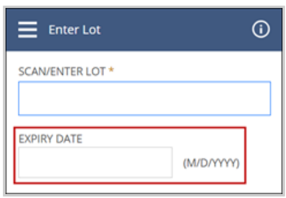
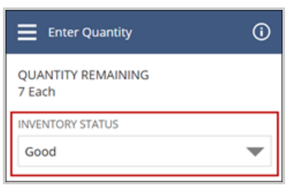
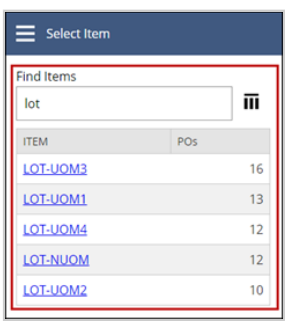
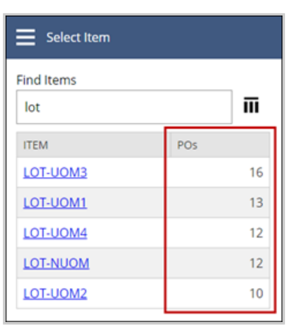
- Bin Putaway
- Bin Transfer
- Create Inventory
- Cycle Count
- Multi-Order Picking
- Single Order Picking
- Purchase Order Receiving
- Customer Returns Receiving
- Posting Item Receipt
- Quick Ship
- Replenishment
- Search Inventory

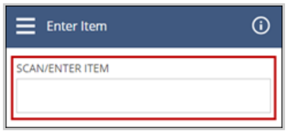
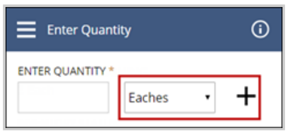
- Transfer Order Receiving

Configuring Page Elements for Mobile Device Processes

The following table outlines the mobile device page elements you can configure, including their possible configurations.

Element	Example	Configurations
Action Button		Element Settings: ■ Display Order ■ Layout ■ Visibility Condition Action Settings (for mobile printing only): ■ Report Type ■ Inactive ■ Required ■ Automatic
Back Button		Content Area Display Order Label
Data Table		Element Settings: ■ Disable Row Click ■ Display Order ■ Include Hidden Element in Load Events ■ Is Mandatory ■ Label ■ Row Size ■ Toggle State ■ Visibility Condition Table Configurations: ■ Show Selected ■ Configuration Order

Element	Example	Configurations
		■ Label
Data Table Columns		Column Order Disable Click Is Visible By Default Label Visibility Condition Custom Columns Configuration: ■ Mobile - Custom Column Setup - Label, On Load Action, Response Key ■ Mobile - Custom Column - Name, Label, Response Key
Date Field		Earliest Date Display Order Latest Date
Dropdown Field		Is Mandatory Disable For Single Value Display Order Visibility Condition
Search Grid		Response Key Search Character Count Search Delay
Search Grid Columns		Column Order Is Visible By Default Visibility Condition

Element	Example	Configurations
Text Box		Disable Paste Display Order Is Mandatory Regular Expression Visibility Condition
Units of Measure (UOM)		Display Order Is Mandatory Visibility Condition

The following table describes the possible configurations for the above mobile device page elements.

Configuration	Description	Values
Column Order	The position the column should appear, in relation to other columns in the table. For example, entering the number 4 places the associated column in the fourth position in the table.	<numeral>
Content Area	The location on the page where the element appears.	Body Footer
Disable For Single Value	If you check this box, and a single value exists in its list, operators cannot edit this element.	<checked> <cleared>
Disable Paste	If you check this box, operators cannot paste text in this element. If you clear this box, operators can paste text in this element.	<checked> <cleared>
Display Order	Where the element appears on the page, in relation to other elements on the page. For example, entering the number 4 places the associated element in the fourth position on the page.	<numeral>
Disable Row Click	If you check this box, operators cannot click text in a row in this element. If you clear this box, operators can click text in a row in this element.	<checked> <cleared>
Earliest Date	Operators cannot enter a date in a date field that is earlier than this date.	<date>
Is Mandatory	Operators must enter a value for the element before they can proceed to the next page.	<checked> <cleared>
Is Visible By Default	If you check this box, the element appears on the page. If you clear this box, the element does not appear on the page.	<checked> <cleared>
Label	The text that should appear on the mobile page.	<text>

Configuration	Description	Values
Latest Date	Operators cannot enter a date in a date field that is later than this date.	<date>
Layout	If you set this field to block, the element appears below other elements. If you set this field to inline, the element appears next to other elements.	Block Inline
Regular Expression	The expected format for the entered text. To be a valid entry, the entered text must match this format. For example, a numbers-only field should use the following regular expression: ^[0-9]*$	<regex>
Response Key	The key from which the table's response can be fetched from the restlet's response.	<data>
Search Character Count	Minimum number of characters an operator types in a search field, after which results appear.	<numeral>
Search Delay	Number of seconds after which the system shows results when operators type text in a search field. If a search delay is not specified, the system shows results when operators click the search icon.	<numeral>
Table Row Size	The number of rows that appear in a table.	<numeral>
Visibility Condition	If this field is set to true, the element is shown. If this field is set to false, the element is not shown.	true false

To configure page elements for mobile device processes:

1. Using the Administrator role, and then go to Setup > Custom > Mobile – Applications.
2. On the Mobile – Applications List page, click **View** next to the mobile application you want to open.

   The Mobile – Process List page appears.
3. Access the mobile page element you want to configure by doing either of the following:
   - To access page elements of a standard mobile process, click **Configure** next to the mobile process. In the **Page** field, select the mobile page that contains the page element. In the **Element** field, select the element you want to configure.
   - To access page elements of a custom mobile process, click **View** next to the mobile process. On the Mobile - Process page, click the **Pages** subtab, and then click the link for the page that contains the element. On the Mobile - Page page, click the **Page Elements** subtab, and then click **Edit** next to the page element you want to configure.

   The list of elements you can configure depends on the selected page.
4. Depending on the selected element, set values in the fields for the configurations you want to apply to the process.

   For information on the configurations you can set, see the tables at the top of this section. For mobile printing settings, see Configuring Report Type Settings in Standard Mobile Processes.
5. If you want to configure a data table, set the fields on the **Table Columns** and **Table Configurations** subtabs.
6. Click **Save**.

Configuring Actions for Custom Mobile Processes

For custom processes, you can configure mobile actions associated with a page, like an on load action, or page element, like an on click action for a button.

Mobile Device Actions and Configurations

The following table lists the mobile device actions you can configure, including their possible configurations. Not all configurations apply to all actions. When you select the action you want to configure, the configuration you can edit appear on the action record.

Action	Description	Configurations
Client Function	Run a custom client script.	Name Client File Path Client Function Name
Forward Form	Navigate to a new page after pushing data from the current page into the state. You can also run client- and server-side validations before pushing data into the state.	After Action Restlet Before Action Restlet Client File Path Client Function Name Convert Response to Object HTTP Method Name Validation Deployment ID Validation Script ID
Logout	Log out of the current session and display the mobile login page.	Name
Page Navigation	Navigate to a new page.	Name Retain State
Print	Display the Print page, generate labels, and evaluate printing rules for mobile printing.	Name Before Print Action
Process Navigation	Navigate to a new page in the process.	Name Target Custom Process Target Standard Process
Restlet	Run a restlet.	Convert Response to Object Deployment ID HTTP Method Name Script ID
Saved Search	Run a saved search.	Name Saved Search

Action	Description	Configurations
Show Message	Run a function from a client script.	Message Name
State	Fill data fetched from a state.	Name State Path
Submit Form	Call a restlet to save the data from the application's state to NetSuite.	After Action Restlet Before Action Restlet Client File Path Client Function Name Convert Response to Object Deployment ID HTTP Method Name Retain State Script ID Validation Deployment ID Validation Script ID
URL Navigation	Navigate to a specified URL.	Name Target URL

The following table describes the possible configurations for the above mobile device actions.

Configuration	Description	Values
After Action Restlet	Restlet to run after executing main action.	<restlet name> For example, Submit Additional Fields.
Before Action Restlet	Restlet to run before executing main action.	<restlet name> For example, Validate Data.
Before Print Action	Restlet to run before a print request submission.	<restlet name> For example, poReceiving_quantityScan_beforePrintActn.
Client File Path	File Cabinet path for the validation client script.	<file path text> For example, SuiteApps/com.netsuite.mobile/client/src/countValidation.js.
Client Function Name	Name for the validation function.	<function name text> For example, doValidation.
Convert Response to Object	If you check this box, the system will convert both validation and submission restlets' responses to objects.	<checked> <cleared>
Deployment ID	Deployment ID for submission restlet.	<deployment ID text>

Configuration	Description	Values
		For example, customdeploy_validate_employee_restlet.
HTTP Method	The type of network request for the action.	Post
Message	Translatable text to display in a dialog box. You can configure static text (constant) or pull text from a field on an existing record.	constant:<text to display> <Record>:{{<internalidPath1>}}|{{< internalidPath2 >}}, <sublist>:<FieldName>{{<lineidPath1>}}|{{<lineidPath2>}}-<message field>
Name	The name of the configured action.	<text>
Retain State	If you check this box, the state will not be cleared after submission. If the target page was already visited during the process, the state will be cleared, even if you check this box.	<checked> <cleared>
Script ID	Script ID for the submission restlet.	<script ID text> For example, customscript_create_employee_restlet.
State Path	Path from which to fetch data for the state.	For example, dataRecord:auxParams:item1:received
Target Custom Process	The target process to run, of the type Mobile – Process.	<name of process> For example, Custom PO Receiving Process.
Target Standard Process	The target process to run, of the type Mobile – Imported Process.	<name of process> For example, PO Receiving Process.
Target URL	The URL for the destination location.	<URL> For example, https://system.netsuite.com/app/help/helpcenter.nl.
Validation Deployment ID	Deployment ID for the validation restlet.	<deployment ID text> For example, customdeploy_validate_employee_restlet.
Validation Script ID	Script ID for the validation restlet.	<script ID text> For example, customscript_validate_employee_restlet.

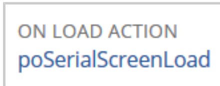
To configure actions for custom mobile processes:

1. Log in to your NetSuite account using the Administrator role.
2. Go to Setup > Custom > Mobile – Applications.
3. On the Mobile – Applications List page, click **View** next to the mobile application you want to open.

   The Mobile – Process List page appears.
4. Next to the custom process you want to configure, click **View**.

   The Mobile – Process page appears.
5. On the **Pages** subtab, click **View** next to the page that uses the action.
6. On the Mobile - Page page, do either of the following:
   - **To configure a page action**

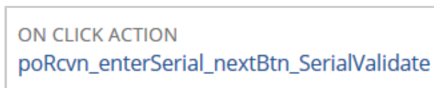
     In the action field, click the action link.



Alternately, on edit mode, click the Open icon next to the action field.

- **To configure a page element action**
    1. On the **Page Elements** subtab, click the element associated with the action you want to configure.

        The Mobile - Page Element page appears.
    2. In the action field, click the action link.

        Alternately, on edit mode, click the Open icon next to the action field.

7. On the Mobile - Action page, click **Edit**.
8. Set the fields for the page or page element action.

    For the list of configuration options, refer to the tables in the Mobile Device Actions and Configurations section of this topic.

    For specific customizations, see the following topics:
    - Setting Up Additional Fields on Custom Mobile Pages
    - Custom Message Setup for Custom Mobile Processes
    - Adding Columns to Table Elements
    - Setting Up Custom Application Identifiers for GS1 Bar Code Scanning
    - Mobile Printing Customization
9. Click **Save**.
10. Update the mobile application to compile your customizations.

    After you complete all customizations, you must update the mobile application.
    a. Go to Setup > Custom > Mobile - Applications.
    b. On the Mobile - Applications List, click the **Update App** link next to the mobile application.

    To view the status of your update, click the link on the processing message at the top of the page. Wait for the confirmation message to appear before you start accessing your custom mobile page.

Mobile Device Customization

From a standard mobile process, you can create a custom process that you can customize. Mobile customization lets you change more settings of a component compared to mobile configuration of standard processes. It also enables you to add or replace the components of a custom mobile process.

For example, you add a custom field to a sales order form. To show it on a page of the Single Order Picking process, you can clone the process and customize it.

As you begin your customization, you can address the following questions to identify the components and how you want to customize them:

- Which mobile process, page, or page element do you want to customize?

Identify the existing mobile process you want to update. If you want to update a page or element, identify the process that contains it. To add a page or element, choose the process in which you want to set it up.

For more information, see Customizing Mobile Device Processes.

- What customizations do you want to perform?

  Within your custom mobile process, you can perform the following customizations:

  - **Mobile processes** – Add pages and assign default settings, such as the name and first page of your custom process.
  - **Mobile pages** – Add page and information screen elements. You can also change the page title and configure page load actions.
  - **Mobile page elements** – Configure mobile actions, messages, and conditions. Set the page element's label, style, visibility condition, position, icon paths, and value settings.

  > **Note:** If you only want to change the default settings of existing page elements, you can make the changes through mobile configuration. See Configuring Page Elements for Mobile Device Processes.

  For instructions on customizing the different mobile components, see the following topics:

  - Configuring Actions for Custom Mobile Processes
  - Setting Up Additional Fields on Custom Mobile Pages
  - Custom Message Setup for Custom Mobile Processes
  - Adding Columns to Table Elements
  - Setting Up Custom Application Identifiers for GS1 Bar Code Scanning
  - Mobile Printing Customization

You can export and import custom mobile processes to migrate or test them on different accounts. See the following topics:

- Exporting Custom Mobile Processes
- Importing Custom Mobile Processes

Customizing Mobile Device Processes

You can clone a standard mobile process to create your custom process and customize it according to your business requirements. Within your custom mobile process, you can add pages, configure the actions of an element, and perform other such customizations.

When you clone a mobile process, you create duplicate versions of its pages, information screen elements, page elements, actions, and icons. NetSuite WMS creates a new icon on the same mobile device page as the parent process.

For example, if you clone the Single Order Picking process, a new icon appears on the Picking page, next to the original Single Order Picking icon.

To customize a mobile device process:

1. Log in to your NetSuite account using the Administrator role.
2. Go to Setup > Custom > Mobile – Applications.
3. On the Mobile – Applications List page, click **View** next to the mobile app that contains the process you want to customize.

The Mobile – Process List page appears.

4. Next to the process you want to clone, click **Clone**.
5. Click **Clone**.

See the following topics for the possible configurations and customizations for custom mobile processes:

- Assigning Custom Roles to Custom Mobile Processes
- Configuring Page Elements for Mobile Device Processes
- Configuring Actions for Custom Mobile Processes
- Setting Up Additional Fields on Custom Mobile Pages
- Custom Message Setup for Custom Mobile Processes
- Bar Code Setup for NetSuite WMS
- Mobile Printing Customization

Setting Up Additional Fields on Custom Mobile Pages

NetSuite WMS enables you to customize mobile pages to save specific data to NetSuite transactions. You can use the NetSuite WMS user interface pages to configure the field elements and set the mobile actions, without having to write any lines of code.

For example, you want to save an item's country of origin to an item receipt when you receive an order. You can start by creating a country of origin custom transaction body field. Then, add the custom field to the mobile page on your custom purchase order process. To save the value in the custom field to an item receipt, configure the submit action on the last page of the process form.

The following limitations apply to the types of data and fields you can set up on custom mobile pages:

- You can only add text and dropdown fields.
- You cannot add custom fields as required fields on transactions.
- You cannot update data on sublist fields, but you can add a new entry to a sublist.
- You can save data to transactions only.
- You cannot save data to records, like item or bin records.

The following instructions include a country of origin custom field example to describe the steps for customizing mobile pages. To view all the possible configurations for page elements and actions, see Mobile Device Actions and Configurations or Configuring Page Elements for Mobile Device Processes.

To set up additional fields on custom mobile pages:

1. Create the custom transaction body field, and then apply it to the transaction.

   For this sample customization, create a Country of Origin transaction body field, and then apply it to the item receipt transaction. For detailed instructions, see the help topic Creating Custom Transaction Body Fields.

   Take note of the internal ID of the new custom field, which you must set up in step 3.
2. Clone the mobile process that contains the page on which you want to display and configure the field.

   For this sample customization, clone the PO Receiving process. To clone a mobile process, go to Setup > Custom > Mobile - Applications. To view the instructions, see Customizing Mobile Device Processes.
3. For your custom mobile process, create and configure the mobile page element for the custom field by doing the following:

a. Using the Administrator role, go to Setup > Custom > Mobile - Applications.

b. On the Mobile - Applications List, click **View** next to the mobile application.

c. On the Mobile - Process List, click **View** next to the custom mobile process you cloned in step 2.

d. On the Mobile - Process page, click the **Pages** subtab, and then click the name of the mobile page on which you want to display the custom field.

   For this example, click the **poReceiving_quantityScan_** link next to the Enter Quantity page.

e. On the Mobile - Page page, click the **Page Elements** subtab, and then click **New Mobile - Page Element**.

f. On the Mobile - Page Element page, enter or select values in the following fields:

   > **Note:** The fields for dropdown elements vary from those for textbox and other page elements. The fields that appear on this page depend on the element type that you select.

   - In the **Name** field, enter a unique name for the page element.
   - In the **Type** field, select the page element type.

     For this example, select **Drop Down**. Only the fields for drop down elements remain on the page.
   - In the **Label** field, enter the field label you want to show on the mobile page.

     > **Tip:** To add a new label, click the new + icon.

     For this example, enter **Country of Origin**.
   - In the **Input ID** and **Input Value** fields, set up the value-label pair that identifies the dropdown element selection. In the **Input ID** field, enter the name of the column that contains the list of values for the pair. The value that corresponds to the dropdown element selection is assigned to the pair. In the **Input Value** field, enter the name of the column that contains the list of labels for the pair. The labels appear as the dropdown element options and the selected label is assigned to the pair.

     You can enter a column from a list or saved search to set up a dynamic list. For this example, set up a static list by entering **["Canada", "United Kingdom", "United States"]** in both fields.
   - In the **Record Name** field, enter the ID of the transaction form to which you want to save the value of this field.

     For this example, enter **itemreceipt**.
   - In the **Field Name** field, enter the ID of the custom transaction body field, which you created in step 1.

   > **Tip:** To get values from a saved search, instead of a list in this example, configure and enter a Saved Search action in the **On Load Action** field. Then, you must set the value of the **Response Key** field to **data**. For the **Input ID** and **Input Value** fields, you must enter the internal IDs of columns returned by the saved search. For more information about mobile actions, see Configuring Actions for Custom Mobile Processes.

4. Configure the Submit Form action setting on the last page of the form by doing the following:

   a. After you have configured the custom field, access the Mobile - Process page, as you did in step 3.

b. On the **Pages** subtab, next to the Enter Bin title, click **poReceiving_enterBin_**.

   For this sample customization, configure the Submit Form action of the submission button that appears on the Enter Bin page, the last page of the PO Receiving process form.

c. On the Mobile - Page page, click the **Page Elements** subtab, and then next to the Enter Bin action button, click the **poReceiving_enterBin_nextBtn** link.

   Mobile pages can have multiple Submit Form actions configured on different page elements. For example, on the Enter Bin page, instead of clicking the Enter Bin submission button, you can select a bin from the table to submit the form. You can update the Submit Form action for the button element, data table element, or both.

   > **Tip:** If you want to apply the same update to the bin table, click **poReceiving_enterBin_binListTbl** next to the Data Table type. On the Mobile - Page Element page, click the action in the **On Row Click Action** field. To configure this action, proceed to step e.

d. On the Mobile - Page Element page, in the **On Click Action** field, click the **poReceiving_validateBinAndSubmit** link.

e. On the Mobile - Action page, click **Edit**.

f. To configure the action setting, beside the **After Action Restlet** field, click the New + icon.

g. On the new Mobile - Action page, enter or select values in the following fields:

   - In the **Name** field, enter a unique name for the restlet action.
   - In the **Type** field, select **Restlet**.
   - In the **HTTP Method** field, select **POST**
   - In the **Script ID** field, enter the ID of the default script: **customscript_mobile_rl_create_record**.
   - In the **Deployment ID** field, enter the ID of the default script deployment: **customdeploy_mobile_rl_create_record**.

h. Click **Save**.

5. After you have completed all of your customizations, you must update the mobile application by doing the following:

   a. Go to Setup > Custom > Mobile - Applications.

   b. On the Mobile - Applications List, click the **Update App** link next to the mobile application.

   To view the status of your update, click the link on the processing message at the top of the page. Wait for the confirmation message to appear before you start accessing your custom mobile page.

Custom Message Setup for Custom Mobile Processes

On a page of a custom mobile process, you can add custom messages that display additional information, instructions, or notes on a mobile device. You can display messages or text from a standard or custom order, line item, customer, or item record.

NetSuite WMS provides the dynamic text page element that enables you to display a message directly on a mobile page. It also provides the show message action to display a message on a popup window.

See the following procedures for setting up messages in a custom mobile process:

- Setting Up Custom Messages in a Dynamic Text Element
- Setting Up Custom Messages in a Show Message Action

Before you can set up a custom message, be sure that you have cloned the mobile process. For instructions, see Customizing Mobile Device Processes.

Custom Static and Dynamic Messages

In the Message field of a dynamic text element or show message action, you can define a static or dynamic message. To set up dynamic messages, you can retrieve field values from a record, state, or constant. See the following sample custom message configurations to retrieve field values for your message or the actual message you want to display:

> **Note:** NetSuite WMS does not support nested dynamic messages.

- For records, use the **record** keyword followed by the path to the field that contains a value to include in your dynamic message. The field could also contain the actual message itself. You can insert a state path to get field values from a state, or a constant to specify internal and line item IDs. The following example retrieves the message from the Memo field of a purchase order. It also uses a constant for the sample internal ID of the purchase order record.

  Example: **{{record:purchaseorder:{{constant:1}}-memo}}**
- For states, use the **state** keyword followed by the path to the key that contains the field value. The following example retrieves the warehouse location from its name key in a state.

  Example: **state:dataRecord:auxParams:warehouseLocation_LocationTbl:name**
- For constants, use the **constant** keyword followed by the text for your static message or a value you want to configure for your dynamic message.

  Example: **constant:Purchase Order Instructions**

In the Message field, you can also enter HTML tags to structure and format your static or dynamic message. The following sample dynamic message uses record and state paths to display instructions for an item:

*** Instructions for {{state:dataRecord:scriptParams:fetcheditemname}}: {{record:purchaseorder:{{state:dataRecord:auxParams:selectPOFromList_poListTbl:internalid}}, item:line:{{state:dataRecord:scriptParams:lineno}}-custcol_po_col_item_instruction}}.**

Setting Up Custom Messages in a Dynamic Text Element

Add a dynamic text element to configure the message you want to display directly on a mobile page.

Within a dynamic text element, you can also set up a link for the message you want to display on a popup window. Then, you can configure the show message action in the On Click Action field of the element.

For example, you want to add the link, PO Instructions, to a mobile page. You can enter the text in the Message field of the dynamic text element. When you configure the corresponding show message action, the PO Instructions link appears on the mobile page. You can click the link to open the popup window with your message.

For more information about the show message action, see Setting Up Custom Messages in a Show Message Action.

To set up custom messages in a dynamic text element:

1. Using the Mobile – Administrator role, access the page on which you want to set up the dynamic text element. For instructions, see Configuring Page Elements for Mobile Device Processes.
2. On the Mobile - Page page, click the **Page Elements** subtab, and then do either of the following:

- To add a Dynamic Text page element, click **New Mobile - Page Element**.
- To edit an existing element, click **Edit** next to the Dynamic Text element.

3. On the Mobile - Page Element page, enter or select values in the following fields:
   - In the **Name** field, enter a unique name for the Dynamic Text element.
   - In the **Type** field, select **Dynamic Text**.
   - In the **Label** field, select the label you want to appear on the mobile page.

     If you want to create a label, click the new +
4. In the **Message** field, do one of the following:
   - If you want to display your message directly on the mobile page, enter the message.

     To view sample message configurations, see Custom Static and Dynamic Messages.
   - If you want to display your message on a popup window, enter the text that serves as the link to your message.

     To set up the actual message, see Setting Up Custom Messages in a Show Message Action.
5. If you enter a record path for your message, in the **Record Name** field, enter the ID of the record.
6. To configure other dynamic text element settings, such as the layout and text style, see Configuring Page Elements for Mobile Device Processes.
7. Click **Save**.
8. After you have completed all of your customizations, you must update the mobile application by doing the following:
   a. Go to Setup > Configuration > Applications.
   b. On the Mobile - Applications List, click the **Update App** link next the mobile application.

   To view the status of your update, click the link on the processing message at the top of the page. Wait for the confirmation message to appear before you start accessing your mobile page.

Setting Up Custom Messages in a Show Message Action

Add a show message action to configure the message you want to display on a popup window. You can configure this action in certain page or element fields, such as the On Click Action field of a dynamic text element or the On Load Action field of a page.

To set up a show message action in a dynamic text element, make sure that you have configured the element. See Setting Up Custom Messages in a Dynamic Text Element.

To set up custom messages in a show message action:

1. Using the Mobile – Administrator role, access the page or dynamic text page element on which you want to configure a show message action. For instructions, see Configuring Actions for Custom Mobile Processes.
2. Depending on where you want to configure the action, do either of the following:
   - In the **On Load Action** field of a page, click the action link to edit an existing action or click the new icon to add an action.
   - In the **On Click Action** field of a page element, click the action link to edit an existing action or click the new icon to add an action.
3. On the Mobile - Action page, enter or select values in the following fields:
   - In the **Name** field, enter a unique name for the Show Message action.
   - In the **Type** field, select **Show Message**.

- In the **Label** field, enter the message you want to display on the popup window.

  To view sample message configurations, see Custom Static and Dynamic Messages.

4. Click **Save**.
5. After you have completed all of your customizations, you must update the mobile application by doing the following:
   a. Go to Setup > Configuration > Applications.
   b. On the Mobile - Applications List, click the **Update App** link next the mobile application.

   To view the status of your update, click the link on the processing message at the top of the page. Wait for the confirmation message to appear before you start accessing your mobile page.

Mobile API for Client Function Scripts

The Mobile API provides access to the mobile object and its functions. You can use the functions in your client scripts to work with data in components or elements of mobile pages. You can configure your custom client script in the Client Function mobile action, which runs its function. For more information about this action, see the help topic Mobile Device Pages, Actions, and Configurations.

When you create a custom client script, you can use the Mobile APIs in the following categories:

- Mobile Page Element APIs
- Mobile Sublist APIs
- Mobile Sublist APIs
- APIs to Call RESTlets
- Mobile Popup Window APIs

Note the following guidelines for creating custom client scripts with Mobile APIs:

- All functions must be bundled in a module inside a function expression, with the module returned at the end.
- To pass data into a function, you can configure the input parameters on the Mobile - Action page of the Client Function action. The values are resolved and passed as arguments.

Mobile Page Element APIs

The following APIs enable you to work with page elements and their data:

- disableField(elementName)
- enableField(elementName)
- getElementSourceData(elementName)
- getValueFromPage(elementName)
- hideField(elementName)
- setElementSourceData(elementName, sourceData)
- setFocusOnElement(elementName)
- setValueInPage(elementName, value)
- showField(elementName)

disableField(elementName)

Disables an element that is hidden from or displayed on a mobile page.

Parameters

- elementName {string} [required] – Name of the page element you want to disable

Returns

- void

enableField(elementName)

Enables an element that is hidden from or displayed on a mobile page.

Parameters

- elementName {string} [required] – Name of the page element you want to enable

Returns

- void

getElementSourceData(elementName)

Gets the source data of a dropdown, search grid, or data table element.

Parameters

- elementName {string} [required] - Name of the page element that contains the source data

Returns

- Returns the source data for the page element, usually an array of objects

getValueFromPage(elementName)

Gets the value of an element on a mobile page.

Parameters

- elementName {string} [required] – Name of the page element that contains the value

Returns

- The value of the page element, in the element's data type

hideField(elementName)

Hides an enabled or disabled element from a mobile page.

Parameters

- elementName {string} [required] – Name of the page element you want to hide from a mobile

Returns

- void

setElementSourceData(elementName, sourceData)

Sets the source data of a dropdown or data table element.

Parameters

- elementName {string} [required] - Name of the dropdown or data table element to which you want to assign the source data

- sourceData {Array of objects} [required] – The source data you want to associate with the page element

Returns

- void

setFocusOnElement(elementName)

Gives focus to any of the following input field elements on a mobile page: Textbox, Date, UOM, or Search Grid.

Parameters

- elementName {string} [required] - Name of the element you want to assign the focus to

Returns

- void

setValueInPage(elementName, value)

Sets the value of an element on a mobile page in the following ways:

- For Action Button elements, it sets the button’s label.
- For Data Table elements, it selects the row that contains the values.
- For Data entry or selection elements, it sets the field value.

> **Note:** If no value is provided, it does not select any row from table elements or leaves data entry elements blank.

For the UOM element, the behavior depends on the value you provide:

- String - Sets the value for the quantity.
- Object - Sets the value for a single unit and quantity.
- Array of Objects - Sets or adds rows of units and quantity values.

> **Note:** If no value is provided, it sets the default unit and leaves the quantity blank.

Parameters

- elementName {string} [required] – Name of the page element to which you want to assign the value
- value [optional] – Value you want to set in the element, in the element’s data type, as shown in the following table

Data Type	Page Element	Example
String	Action Button, Date, Dynamic Text, Search Grid Textbox, UOM	Action Button example: Enter Item Dynamic Text example: `Preferred bin {{state:dataRecord:auxParams:prefBin}}` ` ` `Previous bin {{state:dataRecord:auxParams:prevBin}}`
Object	Data Table, Date, Drop Down, Search Grid, UOM	Date example:

Data Type	Page Element	Example

		`{"value": "29-JUN-2021", "format": "DD-MMM-YYYY"}`
		Drop Down example:
		`{"label": "Good", "key": "1"}`

Array	Multi-Select Data Table	Multi-Select Data Table example:
		`[{"poid": "PO 01", "#items": 4, "qty": 10},`
		`{"poid": "PO 02", "#items": 5, "qty": 5}]`

	UOM	UOM example: `[{value: 1, unit: '1'}, {value: 2, unit: '2'}]`

Returns

- void

showField(elementName)

Displays an enabled or disabled element on a mobile page.

Parameters

- elementName {string} [required] – Name of the page element you want to show on a mobile page

Returns

- void

Mobile Sublist APIs

The following APIs enable you to work with data in sublists:

- sum(sublistLocation, fieldname, filterCondition)
- count(sublistLocation, filterCondition, uniqueFieldName)

sum(sublistLocation, fieldname, filterCondition)

Use this method to calculate the total value of data in a sublist column on a mobile page.

Parameters

- sublistLocation {string} [optional] – Name of the mobile page that contains the sublist
- fieldname {string} [optional] – Name of the field or page element used in the column that contains the numeric values you want to compute
- filterCondition {string} [optional] – An expression that evaluates to true or false

Returns

- Number

count(sublistLocation, filterCondition, uniqueFieldName)

Returns the total number of rows or lines in a sublist on a mobile page.

Parameters

- sublistLocation {string} [optional] - Name of the mobile page that contains the sublist
- filterCondition {string} [optional] - An expression that evaluates to true or false
- uniqueFieldName {string} [optional] - Name of the field or page element used in the column that you want to count. Only rows or lines that contain data in the field are counted

Returns

- Number

Mobile State APIs

The following APIs enable you to retrieve from or insert data into a state:

- getRecordFromState()
- setRecordInState(dataRecord)

getRecordFromState()

Use this method to get the entire dataRecord object from a state.

Parameters

- None

Returns

- The dataRecord object that is stored in the state

setRecordInState(dataRecord)

Sets the dataRecord object for a state.

Parameters

- dataRecord {Object}[required] – The dataRecord object you want to add to a state

Returns

- void

Example

```
mobile.setRecordInState({"sublistNames": [], "sublists": {}, "auxParams": { "recordLink": "", "Config_DropDown": { "label": 1, "value": 1 }, "Config_DropDown_1": { "value": 3, "label": 3 }, "UOM1_EnterItemID": "7" }, "scriptParams": {}, "process": { "name": "ConfigurationTest" } })
```

APIs to Call RESTlets

The following APIs enable you to call RESTlets and primary mobile actions:

- callRestlet(scriptId, deploymentId, restletParams, callback)
- callPrimaryAction()

callRestlet(scriptId, deploymentId, restletParams, callback)

Use this method to call or execute a custom RESTlet. You can add parameters and a callback function to which you can pass the RESTlet’s response.

Parameters

- scriptId {string} [required] – ID of the custom script record associated with the RESTlet you want to call
- deploymentId {string} [required] – ID of the custom deployment record for the script
- restletParams {Object} [optional] – Any parameters that you want to pass to your RESTlet
- callback {string} [optional] – Name of the function to which you want to pass the RESTlet's response

Returns

- void

callPrimaryAction()

Use this method to call the action associated with the Action Button element that is tagged as the primary action. In standard mobile processes, the primary action usually performs a data validation or submission, along with a move to the next page.

> **Note:** The Action Button element of the primary action must be located at the footer of a mobile page.

Parameters

- None

Returns

- void

Mobile Popup Window APIs

The following functions are available for elements on popup windows associated with a mobile page:

> **Note:** These functions cannot be called from a mobile page.

- callPopupPrimaryAction()
- setPopupElementSourceData(elementName, sourceData)

callPopupPrimaryAction()

Use this function to call the action associated with the Action Button element on a popup window that is tagged as the primary action.

> **Note:** The Action Button element of the primary action must be located at the footer of a popup window.

Parameters

- None

Returns

- void

setPopupElementSourceData(elementName, sourceData)

Sets the source data of a dropdown or data table element on a popup window.

Parameters

- elementName {string} [required] - Name of the dropdown or data table element on a popup window
- sourceData {string} [optional] - The source data that contains the values you want to assign to the element

Returns

- void

Error

- Invalid or missing reference to a popup window

Transfer Table APIs

The Transfer Table APIs in this section enable you to work with data on a transfer table and its groups. In the Pack Station mobile processes, the left table contains the rows of items or cartons to be packed. When you pack orders through your kiosk device, you transfer each of these rows to the right table to indicate that they are processed. The default groups shown in the panel beside the transfer table represent the cartons for the packed items and pallets for the packed cartons. When you select a group, Pack Station displays the rows of packed items or cartons associated with it.

In the standard mobile processes for Pack Station, the APIs are commonly used in parameter fields for the action of a transfer table's button element. They are also used in the fields of a page or page element, such as the Title field of a page or the Visibility Condition field of a button element. For more information, see the following topics:

- Configuring Transfer Table APIs in Parameter Fields
- Configuring Transfer Table APIs in Other Fields

To configure fields with APIs, you must include a reference to the transfer table element and the page keyword in the following format:

page:<name of transfer table element>:<function>:<key>

Optionally, you can add the following keys for specific properties of a group:

- _isLocked - Indicates whether the group is packed or closed
- _isFocused - Indicates whether the group is currently selected from the panel
- _shipAsIs - Indicates whether the item in a group or carton is classified as ships individually or ships as is
- _additionalDetails - Additional details about a group. For Pack Station, additional details include carton dimensions and packing instructions.
- _title - The group's label as shown in the panel
- _weight - Weight of a group. In Pack Station, weight is assigned to a packed carton

The following APIs are available for Transfer Table elements:

- addGroup()
- deleteGroup()
- getActiveGroup()
- getActiveGroupDetails()
- getData()
- getGroupCount()

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- getValue()
- isLeftTableEmpty
- isAllGroupsPacked
- select()
- updateGroup()

Configuring Transfer Table APIs in Parameter Fields

You can set up the functions in the input and output parameter fields for a mobile action of a page element, usually a button. The parameters are used by a RESTlet that you can assign to a mobile action.

For example, the standard Unpack Carton button element uses APIs in the following parameter fields for its Forward Form action:

- **Value** - In the Value field setting of an input parameter key, page:packItems_itemsTbl:getActiveGroupDetails() uses the getActiveGroup() function. This function retrieves the data of the packed carton group.
- **Destination Key** – In the Destination Key field setting of an output parameter response, page:packItems_itemsTbl:addGroup() uses the addGroup() function. This function recreates the group for the unpacked carton using the data returned by the input parameter.

These parameters are used by the validation RESTlet configured for the Forward Form action. When you tap the Unpack Carton button on your kiosk device, the functions in the parameters are called accordingly.

Configuring Transfer Table APIs in Other Fields

You can use the functions when you set values in the fields of custom mobile pages or page elements.

Take for example the following setting in the Title field of a popup window:

Delete Carton: {{page:packItems_itemsTbl:getActiveGroup():_title}}

It uses the function to get the title of the currently selected group, which is then displayed as part of the title of the popup window.

Another example uses the following setting in the Visibility Condition field of a button element:

{{page:packItems_itemsTbl:getActiveGroup():_isLocked}}

When the function returns the value of the _isLocked key for the currently selected group, Pack Station uses it to determine whether to display the button.

addGroup()

Creates a group and displays it in the panel beside a transfer table.

Input format

- _title [string, required] - Unique label that you want to assign to the group.

Returns

- Null

Example

The following example is used in an output parameter for the Forward Form action of the standard Add Carton button:

page:packItems_itemsTbl:addGroup()

deleteGroup()

Deletes the group selected from the panel. Before it deletes a group, it transfers the rows associated with the group from the right to the left transfer table. In the standard mobile processes, it uses the group data passed by the getActiveGroupDetails() function configured as an input parameter.

Parameters

- None

Returns

- Null

Example

The following example is used in an output parameter for the Forward Form action of the standard Delete button:

page:transferOrder_packItems_itemsTbl:deleteGroup()

getActiveGroup()

Gets all the data, excluding row data, of the currently selected group from the panel. In the standard mobile processes, the data returned by this function is used by the updateGroup() function.

Parameters

- None

Returns

- Object

Example

The following example is used in an input parameter for the Forward Form action of the standard Unpack Carton button:

page:transferOrder_packItems_itemsTbl:getActiveGroup()

getActiveGroupDetails()

Gets all the data, including row data, of the currently selected group from the panel. In the standard mobile processes, the data returned by this function is used as an input for the deleteGroup() function.

Parameters

- None

Returns

- Object

Example

The following example is used in an input parameter for the Forward Form action of the standard Unpack Carton button:

page:transferOrder_packItems_itemsTbl:getActiveGroupDetails()

getData()

Use this function to get all the data in the transfer table element and the groups in the panel beside it.

Parameters

- None

Returns

- Object

Example

The following example is used in an input parameter for the Forward Form action of the standard Save & Close button:

page:packItems_itemsTbl:getData()

The function returns the combined data from the transfer tables and groups gathered during a packing session.

getGroupCount()

Returns the total number of groups shown in the panel beside the transfer tables:

Parameters

- None

Returns

- Numeric

Example

The following example is used as a visibility condition for the standard Delete Carton button of a transfer table element:

{{page:packItems_itemsTbl:getGroupCount()}} > 0

The function returns the total number of groups and that number is used to evaluate the expression.

getValue()

Gets the data for the row selected from the left or right table. For Pack Station, you can use this function to get data when you pack or unpack an item on the transfer table. It gets the data from the left row, right row of the active group, and the active group.

Parameters

- None

Returns

- Object

isLeftTableEmpty

Determines whether the left side of a transfer table element is empty.

Parameters

- None

Returns

- Boolean – Returns **true** if the left table does not show any records or **false**, otherwise.

Example

The following example is used as part of the visibility condition for the standard Next button of a transfer table element:

{{page:packItems_itemsTbl:isLeftTableEmpty()}} && {{page:packItems_itemsTbl:isAllGroupsPacked()}}

The isLeftTableEmpty() function returns a value for the left-hand side of the expression.

isAllGroupsPacked

Determines whether all the groups shown in the panel are packed or closed.

Parameters

- None

Returns

- Boolean – Returns **true** if the left table does not show any records or **false**, otherwise.

Example

The following example is used as part of the visibility condition for the standard Next button of a transfer table element:

{{page:packItems_itemsTbl:isLeftTableEmpty()}} && {{page:packItems_itemsTbl:isAllGroupsPacked()}}

The isAllGroupsPacked() function returns a value for the right-hand side of the expression.

select()

Selects a row from a transfer table element. In Pack Station, this function is called from a textbox element when data is provided through a bar code scan or manual entry.

> **Note:** You can also use this function for data table elements. For this element, you can set the Select Multiple Rows setting to allow the selection of multiple rows. The selected rows can be submitted by tapping a button. Otherwise, row selection and submission are performed at the same time.

Parameters

> **Tip:** You can enter these parameters in the Response Key field of an output parameter.

- criteria [Object, optional] – Object that contains the data from the table that you want to apply as criteria that determines the row to be selected. In case several rows contain the data you provide in the textbox, the choices are narrowed down using the criteria.
- clickConfig [string, optional] – Key for the column that you can tap to select a row from a table element.
- errorMessage [string, optional] – Error message that you want to show on the table element.

Returns

- Null

Example

The following example is used in an output parameter for an on scan action of a textbox element:

page:selectSalesOrder_salesorderListTbl:select()

updateGroup()

Use this function to update the data of an existing group shown in the panel of the transfer tables.

- _title [string, required] - Unique label for the group.
- _isLocked [Boolean, required] - **True** if the group is packed or closed; otherwise, **false**.
- errorMessage [string, optional] – Error message that you want to show on the table element.

Returns

- Null

Examples

The following example is used in an output parameter for the Forward Form action of the standard Pack Carton button:

page:transferOrder_packItems_itemsTbl:updateGroup()

To perform the group update, this function uses the data passed by the getActiveGroup() function configured in an input parameter.

Exporting Custom Mobile Processes

After you add your customizations to custom mobile processes, you can migrate or test them on different NetSuite accounts. To access custom mobile processes on another account, you must export them from your account. You can export all the active custom processes of a mobile app from your account and not one process at a time.

> **Note:** The accounts that you use cannot be on different NetSuite versions and different bundle versions. For example, you can export from and import into accounts that have the same NetSuite 2021.2 version, the same NetSuite WMS 2021.2 bundle version, and the same SCM Mobile 2021.2 bundle version.

When you export your custom mobile processes, NetSuite creates a copy of the appConfig.js file. You can save the file to a local folder on your computer.

To export custom mobile processes:

1. Go to Setup > Custom > Mobile - Applications.
2. On the Mobile – Applications List page, click **View** next to the mobile app that contains the process.
3. On the Mobile – Process List page, click **Export Custom Processes**.

   On the Processing banner, a message appears with a link, which you can click to view the status of the export.
4. On the popup window for the appConfig.js file, click **Save File**, and then save the file to your local folder.

You can change the name of the file before you save it.

You can import the appConfig.js file for the custom mobile process into a different NetSuite account. See Importing Custom Mobile Processes.

Importing Custom Mobile Processes

From an exported appConfig.js file, you can import one mobile process at a time into another NetSuite account. Make sure that the other account uses the same SCM Mobile app to which the processes belong to. Also, it must not contain custom mobile processes that have the same name as the processes you want to import.

> **Note:** The accounts that you use cannot be on different NetSuite versions and different bundle versions. For example, you can export from and import into accounts that have the same NetSuite 2021.2 version, the same NetSuite WMS 2021.2 bundle version, and the same SCM Mobile 2021.2 bundle version.

To import custom mobile processes:

1. Using the Mobile – Administrator or Packing Administrator role, go to Setup > Configuration > Import Custom Process.

   The Import Assistant page appears.
2. For Step 1: Scan and Upload Application File, do the following:
   a. In the **Custom Application File** field, click **Browse**.
   b. On the **File Upload** popup window, search for the folder that contains the exported appConfig.js file for the custom mobile processes.
   c. Select the file from the folder, and then click **Open** to close the popup window.
   d. Click **Next**.
3. For Step 2: Start Import Process, do the following:
   a. In the **Start Import: Custom Mobile Process** field, select the process you want to import.
   b. Click **Finish**.

The Scheduled Script Status page appears on which you can monitor the status of your import. If the import has not been completed yet, you can click **Refresh** to view the latest status.

Repeat the procedure if you have more custom mobile processes to import. To view the imported processes of a mobile app, you can go to Setup > Configuration > Applications.

System Rules for NetSuite WMS

NetSuite WMS provides system rules that enable alternate behavior for warehouse processing tasks. You can activate a system rule that applies to all or specific warehouse locations.

For example, if you have a business exception that applies to one warehouse location, you can make a copy of the default system rule and assign it to a specific warehouse location.

See the following topics in this section:

- System Rule Values and Actions
- Activating System Rules

System Rule Values and Actions

In the following table, you can view the description for each rule value of a system rule. Note the separate set of rules that apply only for locations that use bins.

System Rule Name	Rule Value	Action
Prerequisite rule **Important:** To transition to the new NetSuite WMS solution available in version 2019.2 and later, you must activate this system rule. NetSuite WMS deploys menus and scripts for the new capabilities and undeploys those provided in a NetSuite WMS version earlier than 2019.2. Even if you manually deploy these scripts, NetSuite WMS will undeploy them again every bundle upgrade.		
Enable Warehouse Management	Y	Activates the warehouse management capabilities on your NetSuite WMS account. **Note:** Activate this rule after you enable the Warehouse Management feature. See Warehouse Management Feature and System Rule. If you have upgraded from a NetSuite WMS version earlier than 2019.2, activating this rule disables menus and scripts used by capabilities from a NetSuite WMS version earlier than 2019.2, including the RF > RF Main Menu > RF/Mobile Screen menu and customdeploy_wmsse_menu_loc_scan script. In case the Oracle NetSuite WMS SuiteApp is no longer active or installed on your account, make sure you inactivate this rule. Otherwise, you might encounter issues when you try to process orders through your mobile device.
	N	The default setting that does not activate the warehouse management capabilities on your NetSuite WMS account. **Note:** Inactivating this rule disables menus and scripts used by capabilities from NetSuite WMS Version 2019.2 and later, including the RF > RF Main Menu > NS WMS Mobile and customdeploy_wms_mobilemenu script.
System rules for locations that use and do not use bins		
Allow picking of expired items?	Y	Items from expired lots are listed on mobile devices when you pick items for orders.
See Preventing the Picking of Expired Items.	N	Items from expired lots are not listed on mobile devices when you pick items for orders.
Enable Advanced Barcode Scanning?	Y	Enables you to scan supported formats of GS1 or composite item bar codes.

System Rule Name	Rule Value	Action
See Bar Code Setup for NetSuite WMS.		When used with the Tally Scanning rule, you can tally scan GS1 item bar codes. When used with Mobile Printing, it also enables you to generate GS1 item bar codes for printing of item or pallet labels. For more information about printing, see Mobile Printing for NetSuite WMS.
	N	The default setting that does not enable scanning of GS1 or composite item bar codes.
Enable bulk picking for large pick tasks	Y	The default setting that enables outbound picking of large pick tasks in bulk. With the pick task size initially set to 50 lines, pick tasks that have more than 50 pick task lines go through bulk picking. When you enable the rule, you can change the limit to any number from 1 to 125 pick task lines. NetSuite WMS automatically creates and submits the bulk processing jobs, and then places them in a queue. The processing time for bulk staging varies, depending on the number of line items and other pending jobs. It also depends on the number of processors in your account, which you can increase by upgrading your service tier.
	N	Applies bulk picking only for pick tasks that have more than 125 pick task lines. **Note:** If you observe slowness in performance on your mobile device, you can enable the rule and decrease the size limit or number of pick task lines.
Enable Receive All option for inbound shipments? See Receiving Inbound Shipment Orders.	Y	If you use the Inbound Shipment feature, it enables you to receive all items on an inbound shipment at the same time using your mobile device.
	N	The default setting that hides the Receive All button from the mobile page of the inbound shipment process.
Enable Tally Scan? See Picking Orders.	Y	Enables you to scan an item and increment the quantity by 1. NetSuite WMS automatically enables and checks the Use Tally Scan box on new item records. You can check this box to enable Tally Scan for existing items. See Creating Items for NetSuite WMS. Tally Scanning supports the following mobile processes: ▪ Inbound processes - Inbound processes - Purchase order, transfer order, customer return, and inbound shipment receiving; cart putaway ▪ Inventory process – Work order picking, bin putaway, cycle count, inventory transfers, and bin transfers ▪ Outbound processes – Single order and multi-order picking
	N	The default setting that does not enable tally scan for the supported processes.
Generate EDI 856 outbound ASNs?	Y	EDI ASN data is generated when items are shipped.

System Rule Name	Rule Value	Action
See Electronic Data Interchange (EDI) Integration.		This behavior is required if you are working with a NetSuite partner to send advance shipping notices (ASN) to customers using the Electronic Data Interchange (EDI) method after items are shipped.
	N	EDI ASN data is not generated when items are shipped. This behavior is required if you do not need to send customers advance shipping notices (ASNs) after items are shipped.
Manually pack orders? See Manually Packing Orders and Printing Packing Lists.	Y	Does not automatically pack orders after they are picked or staged. You must manually pack orders and optionally enter pack carton details or print packing lists. Updates associated fulfillment records of manually packed items.
	N	Automatically sets fulfillment records to Packed status, and assigns it with a default pack carton and a package that has the weight specified on the item record. ■ If you use pick cartons for single or multi-order picking, the pick carton is assigned as the pack carton. Use cartons for single-order picking? or Use cartons for multi-order picking? ■ If no weight can be found on the item record, the package is assigned a weight of 1 lb.
Manually post item receipts? See Manually Posting Item Receipts.	Y	One item receipt is posted for all items in an order after they are put away and you manually select to post the item receipt. You can enable this rule for each or all inbound processes.
	N	An item receipt is posted to NetSuite for each individual item after it is put away.
Print pick carton labels?	Y	Enables you to print labels for pick cartons from your mobile device. Before you can enable this rule, you must first enable Mobile Printing and one or both of the following rules: Use cartons for single-order picking? or Use cartons for multi-order picking? You must create separate copies of this rule for each Use cartons rule that you have enabled.
	N	The default setting that does not enable you to print pick carton labels.
Use cartons for multi-order picking? See Picking Orders.	Y	Enables and displays the Enter Carton page on which you can enter pick carton details during multi-order picking on a mobile device.
	N	The system does not prompt you to enter pick carton details on mobile devices during multi-order picking.
Use cartons for single-order picking? See Picking Orders.	Y	Enables and displays the Enter Carton page on which you can enter pick carton details during single order picking on a mobile device.
	N	The system does not prompt you to enter pick carton details on mobile devices during single order picking.

System Rule Name	Rule Value	Action
Use custom packing lists? See Manually Packing Orders and Printing Packing Lists.	Y	Uses the custom script that contains your custom PDF packing list when you print packing lists for manually packed orders. **Note:** Before you can activate this rule, you must first activate the Manually pack orders? system rule. Also, you can create a copy of the default custom packing list if you want to customize it according to your business requirements. See Setting Up Custom Packing Lists.
	N	Uses the default format when you print packing lists for both manually and automatically packed orders.
Use WMS Shipping Integration? See NetSuite WMS Shipping Integration Setup.	Y	The NetSuite WMS Shipping Integration is enabled. This integration provides a connection between NetSuite and your parcel carrier shipping software (for example, FedEx Ship Manager or UPS WorldShip).
	N	The NetSuite WMS Shipping Integration is disabled. This integration provides a connection between NetSuite and your parcel carrier shipping software (for example, FedEx Ship Manager or UPS WorldShip).
System rules for locations that use bins only		
Allow staging for assigned picker only	Y	Enables only the picker assigned to a pick task to stage its picked items.
	N	The default setting that does not prevent pickers not assigned to a pick task from staging its picked items.
Enable bulk loading into staging carts	Y	If you activate the **Stage received items before putting away?** system rule, you can also activate this rule. It enables the Bulk Load option for the item putaway process. During staging, you can select multiple items to transfer to a cart. On your mobile device, you can transfer up to ten items at a time. However, to avoid slow performance issues, you should not transfer large quantities of each item at the same time.
	N	The default setting that does not enable the Bulk Load option for the item putaway process.
Enable bulk staging of large pick tasks	Y	The default setting that enables outbound staging of large pick tasks in bulk. With the pick task size initially set to 25 lines, pick tasks that have more than 25 pick task lines are processed through bulk staging. When you enable the rule, you can change the limit to any number from 1 to 125 pick task lines. NetSuite WMS automatically creates and submits the bulk processing jobs, and then places them in a queue. The processing time for bulk staging varies depending on the number of line items and other pending jobs. It also depends on the number of processors in your account,

System Rule Name	Rule Value	Action
		which you can increase by upgrading your service tier. See the help topic NetSuite Service Tiers.
	N	Applies bulk staging only for pick tasks that have more than 125 pick task lines. **Note:** If you observe slowness in performance on your mobile device, you can enable the rule and decrease the size limit or number of pick task lines.
Enable Zone Picking for single orders	Y	Enables order picking from one or more zones through a mobile device. When you activate this rule, you have the option to require staging of all items from an order in the same bin.
	N	The default setting that does not enable picking from zones.
Enable Zone Picking for multiple orders	Y	Enables order picking from one or more zones through a mobile device. When you activate this rule, you have the options to stage items by order and require staging of all items from an order in the same bin.
	N	The default setting that does not enable picking from zones
Stage received items before putting away? See Putting Away Items.	Y	Staging bin locations are suggested when orders and customer returns are received. This behavior is required if you want to receive items to a staging area before they are put away to their storage bin locations.
	N	Storage bin locations are suggested when orders are received. This behavior is required if you want to put away items directly to their storage bin locations as you receive them.

Activating System Rules

When you activate system rules, you set the rule value to **Y**, and then configure settings that apply to the rule. You can create multiple copies of rules that you can assign to specific locations, mobile processes, or both.

To activate a system rule:

1. Using the WMS Warehouse Manager role, go to WMS Configuration > Configure Warehouse > System Rules.

   The System Rules List appears on the page.
2. Next to the rule you want to activate, do one of the following:
   - To activate an existing rule, click **Edit**. Proceed to step 4.
   - If you want to create a copy of a rule, click **View**.

The WMS System Rules page appears in edit or view mode.

3. To create a copy of a rule, from the **Actions** list, select **Make Copy**.

   A new WMS System Rules page appears in edit mode.

4. Enter or select values in the following fields:
   - In the **Name** field, enter the default rule name.
   - If you want to create a location–specific rule, in the **Location** field, select a warehouse location.

> **Note:** For the **Enable Warehouse Management** rule, do not specify a location. On location records, you can configure locations to use Warehouse Management. See Creating Warehouse Locations.

5. Enter or select values in the fields for the following additional settings that are required or optional for some rules:

System Rule	Fields for Additional Rule Settings	Field Description
Enable Advanced Barcode Scanning?	Process Type	Select either of the following supported bar code types to scan items: **GS1 Bar Code** or **Composite Bar Code**.
Manually post item receipts?		(Optional) Select either of the following supported mobile processes: **Inbound Shipment**, **Receiving**, **Returns**. To apply the rule to all inbound processes, leave this field blank.
Enable bulk picking for large pick tasks	Rule Value	Enter your limit for the number of pick tasks. NetSuite automatically creates a job when the number of pick task lines you submit for processing on the mobile device exceeds this limit.
Enable bulk staging of large pick tasks		
Enable Tally Scan?	Quantity Limit	Enter the maximum ordered quantity for the item on a transaction at which you want to enable Tally Scan. You cannot tally scan an item if the quantity to pick exceeds this limit.
	Apply Rule To	Select the picking type of a standard or custom process in which you want to enable Tally Scan.
Enable Zone Picking for Single Orders Enable Zone Picking for multiple orders	Picking Type	Select **Pick & Merge**.
	Stage By Order	(Optional) For multi-order picking only, check this box if you want to enable staging of items per order. You can stage items picked from different zones at the same time. You have the option of staging them in the same bin.
	Always Merging of Items During Staging	(Optional) Check this box to require that items from an order must be staged in the same bin. For multi-order picking, you must enable Stage by Order before you can enable this setting.
Print pick carton labels?	Apply Rule To	Select the standard or custom process in which you want to print carton labels. For standard mobile processes, select one of the following that must correspond to the Use cartons rule that you use: ▪ If you use the Use cartons for multi-order picking? rule, select **NSWMS_multiOrder_Picking**.

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System Rule	Fields for Additional Rule Settings	Field Description
		■ If you use the Use cartons for single-order picking? rule, select either **NSWMS_singleOrder_salesOrder_Picking** or **NSWMS_singleOrder_transferOrder_Picking**.
Use custom packing lists?	Script ID	Enter the ID of the custom script for your packing list.
	Deployment ID	Enter the ID the deployment record associated with your custom script.

6. Click **Save**.

After you activate a rule, you can activate other rules that depend on it. Also, make sure you update the records with settings required for some of the rules. See System Rule Values and Actions.

NetSuite WMS Shipping Integration Setup

NetSuite WMS Shipping Integration provides a connection between NetSuite and your parcel carrier shipping software. This connection enables you to automate some of your outbound processing tasks to streamline the shipping process.

NetSuite WMS integrates with the following parcel carriers:

- FedEx
- UPS

NetSuite WMS Shipping Integration uses the NetSuite WMS Printer Driver and Carrier Integrator application to automatically:

- Pull shipping data from WMS Ship Manifest records and push them to your carrier shipping software.
- Generate shipping labels for each carton packed using NetSuite WMS.
- Send shipping label print requests to printers in your warehouse.
- Pull tracking number information from your carrier shipping software and push it to WMS Ship Manifest records.

Install the NSWMS Printer Driver application on the same computer in your warehouse's shipping station you use to run your parcel carrier's shipping software. As you pack items in the warehouse, the application runs a scheduled task to find all orders that are ready to be shipped. The application uses information stored in the WMS Ship Manifest record to create shipping labels, and prints them at the printer you configure in the application.

WMS Printer Driver and Carrier Integrator Application Prerequisites

Before you start to install the WMS Printer Driver and Carrier Integrator Application, review the requirements in this section.

Hardware and Software Requirements

- The computer on which you want to install the application runs on Windows XP, Windows Vista, Windows 7, Windows 8, or later versions.

- The computer has at least 80 GB of available space and 4 GB of RAM.
- You have administrator rights to install software on the computer or print server, and to configure the System DSN (Data Source Name) for the carrier integrator.
- The document or label printers must be configured as network printers.
- You have shipping software for the supported carriers, such as FedEx Ship Manager or UPS WorldShip, installed on the same computer on which you want to install the application.

Generating the Application ID

In NetSuite WMS, you can generate the Application ID that you must assign to the application's configuration file.

To generate the Application ID:

1. Using the Administrator role, go to Setup > Integration > Manage Integrations > New.
2. On the Integration page, in the **Name** field, enter **NSWMS Carrier Integration ID**.
3. Click **Save**.

On the saved Integration page, you can view the ID in the Application ID field. When you set up the configuration file, you can copy the Application ID from this field. See Installing and Updating the WMS Printer Driver and Carrier Integrator Application.

NetSuite WMS Shipping Integration Setup Procedures

See the following topics to set up the NetSuite WMS Shipping Integration:

1. Installing and Updating the WMS Printer Driver and Carrier Integrator Application
2. Setting Up Your Login Credentials
3. Configuring the WMS Printer Driver and Carrier Integrator Application
4. (Optional) Setting Up and Generating Commodity Shipment Files
5. Starting the WMS Printer Driver and Carrier Integrator Application

Installing and Updating the WMS Printer Driver and Carrier Integrator Application

To set up the NSWMS Printer Driver Application on your account, you must install the application and complete specific updates to the configuration file. For instructions, see the following topics in this section:

- Installing the WMS Printer Driver and Carrier Integration
- Updating the Configuration File

Installing the WMS Printer Driver and Carrier Integration

To install the WMS Printer Driver and Carrier Integrator application, download the application ZIP file and extract the contents into a local folder on your computer.

Before you install the application, make sure that you have reviewed the requirements. See WMS Printer Driver and Carrier Integrator Application Prerequisites.

Complete the following steps on each computer (all shipping stations, print servers, or both) on which the WMS Printer Driver and Carrier Integrator is configured.

To install the WMS Printer Driver and Carrier Integrator application:

1. Log in using the Warehouse role, and then go to Reports > Configuration > NSWMS Print Driver.
2. On the NSWMS Print Driver page, on the **NSWMS Print Driver Files** subtab, click the **Download Print Driver Files** link.
3. On the Folder Contents page, click **Download** next to the NSWMS Print Driver Application folder.
4. Save the NSWMS Print Driver Application.zip file to a local folder on your computer.
5. Open the ZIP file folder, and then extract its contents to a local folder on your computer.
6. To manually add a desktop shortcut, open the folder with the extracted files, and then right-click the NetsuiteCarrierIntegrator.exe file.

Updating the Configuration File

After you have installed the NSWMS Printer Driver Application, you must update the configuration file with your application ID and role ID for logging in.

> **Note:** Due to the mandatory 2FA implementation for integrations that use highly privileged roles, do not use the Administrator role to access the application. NetSuite WMS provides the WMS Web Services Admin role as the default role to access the application, which requires user-based credentials. To assign this role to users, see the help topic Assigning Roles to an Employee.

To update the configuration file:

1. Open your local folder that contains the extracted files of the NSWMS Printer Driver Application.
2. Using a text editor such as Notepad ++, open the NetsuiteCarrierIntegrator.exe.Config file.
3. earch for the add tag for the `applicationId` key, and then for its value, enter the Application ID.

   For example: `<add key="applicationId" value="A0E1F648-004C-441B-8132-0B2774FB985Y"/>`.

   To generate the Application ID, see Generating the Application ID.
4. Search for the setting tag for the NetSuite SOAP web services endpoint, `NetsuiteCarrierIntegrator_com_netsuite_webservices_NetSuiteService`, and then for its value, do the following:
   a. Replace the placeholder value, `XXXXXXX`, for the domain string in the URL with your SuiteTalk account-specific domain.

      To view your account-specific domains in NetSuite, go to Setup > Company > Company Information, and then click the **Company URLs** subtab. For more information, see the help topic URLs for Account-Specific Domains.
   b. Verify that the port is set to `NetSuitePort_2019_2`.

   For example:

```
<setting name="NetsuiteCarrierIntegrator_com_netsuite_webservices_NetSuiteService" serializeAs="String">
<value>https://9999999.suitetalk.api.netsuite.com/services/NetSuitePort_2019_2</value>
</setting>
```

5. Search for the add tag for the Role key, and then for its value, enter the internal ID for the Web Services Admin role.

   For example: `<add key="Role" value="1000"/>`.

   To view the internal ID for your roles, go to Setup > Users/Roles > Manage Roles. If you cannot find the internal ID of your roles, see the help topic Setting the Internal ID Preference.
6. Save the updated configuration file.

Setting Up Your Login Credentials

> **Note:** Before you begin this procedure, verify that the Show Internal ID preference is set in your NetSuite WMS account. Using the Administrator role, go to Home > Set Preferences. On the **General** subtab, in the Defaults section, check the **Show Internal IDs** box, and then click **Save**.

On your initial log in to the WMS Printer Driver and Carrier Integrator application, you must enter and save your login credentials.

To set up your login credentials:

1. On your computer's desktop, double-click the NetsuiteCarrierIntegrator.exe - Shortcut icon.

2. From the application's menu, go to Settings > Login.
3. On the Login/Environment Settings window, select or enter the following:

Field Name	Description
Environment	To indicate the environment on which you want to configure the application, click one of the two options: **Sandbox** or **Production**.
Role	Enter the internal ID for the Web Services Admin role, which has access to NetSuite WMS and Web Services. **Note:** Make sure that you enter the same internal ID for the role you have set in your configuration file. See Updating the Configuration File. To view the internal ID for your roles, go to Setup > Users/Roles > Manage Roles. For more information about web services access, see the help topic Roles and Permissions in SOAP Web Services.
Account ID	Enter your NetSuite WMS account number. To view your account number, go to Setup > Integration > SOAP Web Services Preferences.
Email	Enter the email address and password for the user. Make sure that the user's role matches the one you entered in the Role field.
Password	

4. Click **Submit**.

The application saves your login credentials to the configuration file, with your password encoded.

After you have logged in to the application for the first time, you do not need to repeat this procedure on subsequent logins.

Configuring the WMS Printer Driver and Carrier Integrator Application

> **Note:** Before you begin this procedure, verify that the Show Internal ID preference is set on your NetSuite WMS account. Using the Administrator role, go to Home > Set Preferences > Defaults. On the **General** subtab, in the Defaults section, check the **Show Internal IDs** box, and then click **Save**.

You can update the default settings for the printer or carrier to suit your business requirements.

To configure the WMS Printer Driver and Carrier Integrator application:

1. On your computer's desktop, double-click the NetsuiteCarrierIntegrator.exe - Shortcut icon.

2. From the application's menu, go to Settings > Configuration.
3. On the Configuration Settings window, select or enter values for the settings you want to configure in the following sections:
   - Record Types
   - Flags
   - Printer Settings
   - BarTender Labels Generation
   - ODBC Connection
   - Other Settings
4. After completing your configurations, click **Save**.

Record Types

In the Record Types section, in the ID fields, enter the internal ID for each NetSuite WMS record.

To obtain the internal ID of a record, log in to your NetSuite WMS account using the Administrator role. Go to Customization > Lists, Records, & Fields > Record Types. From the list of records, view or copy the internal ID of the following NetSuite WMS records:

- WMS Ship Manifest
- WMS Label Printing
- WMS Commodity Shipment

- WMS Open Task
- WMS External Labels

Flags

In the Flags section, check the box next to each of the features you want to enable for one or more carriers:

Features for UPS Only:

- **International Shipment** - Shows the ship manifest data in the worldship.csv file for orders that you want to ship internationally.
- **Get Shipment Data** - Generates the worldship.csv file that is used to communicate data from NetSuite WMS to the parcel carrier shipping software. The application pulls data from NetSuite WMS and writes it back to the worldship.csv file. It also pushes data from the worldship.csv file to the parcel carrier software.
- **Update UPS Tracking#** - Reads the tracking number from the UPS Access database and writes it back to NetSuite records.

Other Features:

- **Update FedEx Tracking#** - Reads the tracking number from the FedEx Access database and writes it back to NetSuite records.
- **BarTender Labels Generation** - Generates a text file that the BarTender application uses to format and print labels.
- **Zebra Label Generation** – Generates shipping labels for the Zebra printer.

  If you check this setting, specify the name of the Zebra printer in the Printer Settings section.

Printer Settings

Before you configure printer settings, verify that you have configured a laser printer and a label printer as network printers and you know the name of both printers. If a printer is properly configured as a network printer, it will have an IP address identified as a port in its properties. For more information, see the help content available on your computer.

In the Printer Settings section, enter the name of the configured network printer you want to use in the following fields:

> **Note:** Be sure to enter the same printer names that are specified on your computer.

- **Zebra Printer** - Name of the Zebra label printer
- **Laser Printer** - Name of the printer for documents such as pick and pack reports

BarTender Labels Generation

You can set your preference in this section only if you have checked the **BarTender Labels Generation** box in the Flags section.

- **Static Printers** – The default option that enables you to always use the printer configured in the BarTender Commander.

- **Dynamic Printers** – Lets you select a printer on the NetSuite WMS user interface.

ODBC Connection

In each of the following fields, set the path for the folder in which you want to save files for one or more carriers. To set a path, click **Upload**, and then on the popup window, navigate to the appropriate folder. After you have located the folder, click **OK** to close the popup window and set the path in the field.

- **WorldShip Path** - The folder where you want to save the worldship.csv file. You can set this field only if you have checked the Get Shipment Data box in the Flags section.
- **Label Path** - The folder where you want to save the external label files and picking or packing reports.
- **Image Path** - The folder where you want to store the packing list logos.
- **UPS MDB Path** - The UPS database location where you want to store UPS tracking information. You can set this field only if you have checked the Update UPS Tracking# box in the Flags section.
- **FedEx MDB Path** - The FedEx database location where you want to store FedEx tracking information. You can set this field only if you have checked the Update FedEx Tracking# box in the Flags section.

Other Settings

In the Other Settings section, enter values for additional settings in the following fields:

- **Site ID** - The internal ID for your warehouse location. If you have only one warehouse location configured in your NetSuite WMS account, or if you do not want to filter data by warehouse location, leave this field blank.

  To view the internal ID for your warehouse location, log in to your NetSuite WMS account using the Administrator role. Then, go to Setup > Company > Classifications > Locations.
- **Interval** - The time period, in milliseconds (1000 mS = 1 second), that you want to pass between each run of the shipping integration.

  Based on the interval you define, the application runs a scheduled script that identifies orders that are packed and ready for shipping.

Setting Up and Generating Commodity Shipment Files

You can generate commodity shipment files, in CSV format, for items that you want to ship to an international destination. You can generate the file for one or more fulfillment records in Packed status.

To set up and generate commodity shipment files:

1. To set up commodity shipment, access the WMS Printer Driver and Carrier Integrator application. Then, on the Configuration Settings window of this application, make sure you set the following fields:
   - ShipManifest ID
   - CommodityShipment ID
   - International Shipment
   - Get ShipMent Data
   - WorldShip Path
   - Label Path

- Interval

For instructions, see Configuring the WMS Printer Driver and Carrier Integrator Application.

2. If you manually pack orders, pack the items, using the NetSuite UI, that you have picked through a mobile device.

   NetSuite automatically creates a WMS Commodity Shipment record for items to be shipped to a different country. It assigns one record to each fulfillment in Packed status.

   For more information about packing orders, see Manually Packing Orders and Printing Packing Lists.

3. Start the WMS Printer Driver application to transmit the data and generate the shipment file.

   NetSuite generates one commodity shipment file for all available WMS Commodity Shipment records. It stores the shipment file in the folder that you set up in the Label Path field. You can access this folder and find the following file: **commoditydata.csv**.

   For more information about starting the application, see Starting the WMS Printer Driver and Carrier Integrator Application.

4. Update the WMS Commodity Shipment records for the fulfillments included in the generated file by doing the following:

   a. To access commodity shipment records, in the NetSuite global search field, enter **WMS Commodity Shipment**.

   b. From the results, click **Page: WMS Commodity Shipment** to open the list.

   c. On the WMS Commodity Shipment page, check the **Status Flag** box.

   d. Click **Save**.

   When checked, this status prevents the same order from appearing in multiple commodity shipment files. Repeat this step to update other records.

Viewing Logs

The application stores exception logs in a default folder. Other logs are stored in the same folders that you have set up in the ODBC Connection section of the Configuration Settings.

To view logs, from the application’s menu, go to Settings > View Logs. On the View folder and logs window, click one of the buttons to open the folder location where you can find the log files.

Starting the WMS Printer Driver and Carrier Integrator Application

Before you run the WMS Printer Driver and Carrier Integrator application, verify that you have completed the setup and configurations that suit your business requirements. See the following topics in this section:

- Setting Up Your Login Credentials
- Configuring the WMS Printer Driver and Carrier Integrator Application
- Setting Up and Generating Commodity Shipment Files

To start the application, on your computer’s desktop, double-click the NetsuiteCarrierIntegrator.exe - Shortcut icon. On the NetSuite WMS Printer Driver and Integrator window, click **Start**. If you want to temporarily pause the application, click **Stop**.

Updating the NetSuite WMS Printer Driver and Integrator Application File

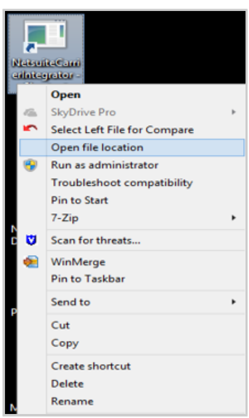
> **Important:** Performing this task is only necessary if you use the Warehouse Management System bundle 2014.1 or earlier versions, where the URL of the SOAP web services endpoint is hard-coded in the CONFIG file. Newer versions of the bundle use dynamic discovery to determine the correct endpoint. If you update the CONFIG file using your SuiteTalk (SOAP and REST web services) account-specific domain, you will not need to make updates again when your account is moved to a different data center.

If you use the Warehouse Management System bundle (2014.1 or earlier versions) in your account, you must update the configuration file for the NetSuite WMS Printer Driver and Carrier Integrator. Edit the URL for the SOAP web services endpoint to reflect your account-specific domain.

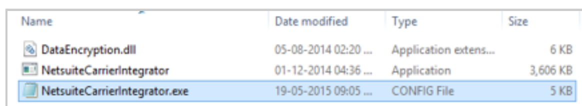
Identify all shipping stations in your warehouse, and all the print servers where the NetSuite WMS Printer Driver and Carrier Integrator is configured. If this application is running, close the application before you complete the following procedure.

To update the NetSuite WMS Printer Driver and Carrier Integrator application file:

1. Locate the shortcut icon for the NetSuite Carrier Integrator application on your desktop. Right–click on the application, and then select **Open file location**.



The installation folder of the NetSuite Carrier Integrator application appears.



2. Open the NetSuiteCarrierIntegrator.exe CONFIG file with a text editor that supports searching using regular expressions (such as Notepad++), and then search for `webservices.*.netsuite.com`.
3. Continue to search the file until you locate the URL for the NetSuite SOAP web services endpoint within the application's Settings section of the CONFIG file.

4. Edit the domain string in the URL to reflect your SuiteTalk (SOAP and REST web services) account-specific domain.

   To view your account-specific domains in NetSuite, go to Setup > Company > Company Information, and click the Company URLs subtab. See the help topic URLs for Account-Specific Domains for more information.

5. Save the CONFIG file, and then start the NetSuite Carrier Integrator application.
6. Repeat this procedure on each computer (all shipping stations and all print servers) on which the NetSuite WMS Printer Driver and Carrier Integrator is configured.

> **Note:** If you need help completing this task, contact NetSuite Customer Support.

Electronic Data Interchange (EDI) Integration

Electronic Data Interchange (EDI) is the computer-to-computer exchange of business data in standard formats. Using EDI, information is organized according to a specified format set by both parties, allowing an automated computer transaction that requires no human intervention or rekeying on either end. The information contained in an EDI transaction set is, for the most part, the same as on a conventionally printed document. EDI standards in the US are set and published by the ASC X12 committee of ANSI. International EDI standards are known as EDIFACT standards.

You can optionally choose to configure NetSuite WMS for use with EDI if you are working with a NetSuite EDI partner to send advance shipping notices (ASN) to customers after items are shipped.

NetSuite WMS creates custom records with the required shipping data.

> **Note:** To autogenerate SSCC-18 codes in GS1–128 format for shipping, see Defining a UCC Code Format.

This data is then read by the NetSuite EDI partner, who converts the data into an EDI document and sends the ASN to the customer. For more information, see Confirming Customer Shipments.

Configuring the EDI integration is a two-step process: you must first enable the EDI system rule and then identify which customers or orders require an ASN when orders are shipped.

To enable the EDI system rule:

1. Using the WMS Warehouse Manager role, go to WMS Configuration > Configure Warehouse > System Rules.
2. On the WMS System Rules List, do one of the following:
   - To enable the ASN system rule for all warehouse locations, click **Edit** next to **Generate EDI 856 outbound ASNs?**. Then, proceed to step 3.
   - To enable the ASN system rule to accommodate a business exception that applies to one warehouse location only, complete the following steps:
     1. Click **View** next to **Generate EDI 856 outbound ASNs?**.
     2. In the **Actions** menu, click **Make Copy**.
     3. In the **Name** field, enter **Generate EDI 856 outbound ASNs?**.
     4. In the **Location** field, select the appropriate warehouse location or warehouse sublocation.
3. In the **Rule Value** field, enter **Y**.
4. To activate the system rule, check the **Active** box.
5. Click **Save**.

To identify which customers require ASNs:

1. Using the WMS Warehouse Manager role, go to WMS Configuration > Configure ERP Records > Customers.
2. Click **Edit** next to the customer that requires an ASN when an order is shipped.
3. Check the **ASN Required?** box.
4. Click **Save**.

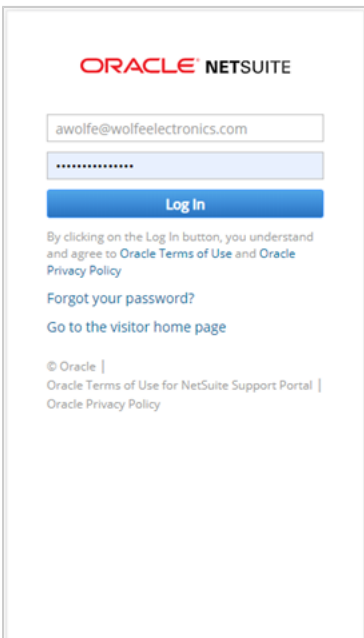
Mobile Device Basics for NetSuite WMS

NetSuite WMS uses the internet browser on your mobile device to enable you to complete transactions wirelessly in your warehouse. As you complete transactions, NetSuite WMS posts real-time updates to your NetSuite account.

This section details how to work with mobile device processes after your mobile devices are set up. For more information on configuring your mobile devices, see Mobile Device Setup.

Logging in to NetSuite WMS on Mobile Devices

Your administrator usually sets the landing page on your mobile device to the NetSuite WMS login page. Go to the login page, enter your email address and password, and then tap **Log In**.



Information Submission on Mobile Devices

You can enter information and select screen elements on your mobile device in different ways, depending on your device model, configuration, and the options on the screen.

When steps in this guide instruct you to select screen elements or enter information on your mobile device, you can use one of the methods described below, as appropriate.

> **Note:** Depending on your device configuration, the next page in processes might not appear automatically. If a field described in an instruction does not appear, tap the enter button at the bottom-right corner of the screen to move to the next page in the process.

You can enter information such as order numbers, inventory item numbers, or bin locations using either the scanning or keyboard function of your mobile device.

> **Important:** Whenever possible, scan an associated bar code to provide the requested information.

Entering Information Using a Scanner

To enter information using a scanner, verify that the cursor appears in the appropriate field and scan the associated bar code.

- If you configured your mobile device to perform the Enter action after a scan, you submit the information automatically after you enter it. Also, the next page in the process appears or the cursor appears in the next field on the same page.
- If you configured your mobile device to perform the Tab action after a scan, tap the enter button at the bottom-right corner of the page to enter the information and move to the next page in the process.

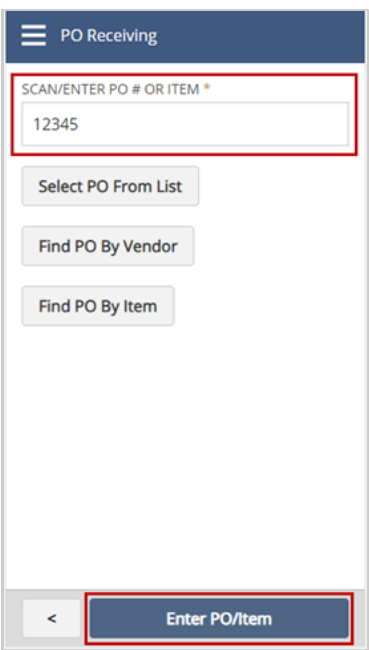
For more information on configuring your mobile device, contact your NetSuite account manager.

Entering Information Using a Keyboard

Verify that the cursor appears in the appropriate field, and then type the associated text or number.

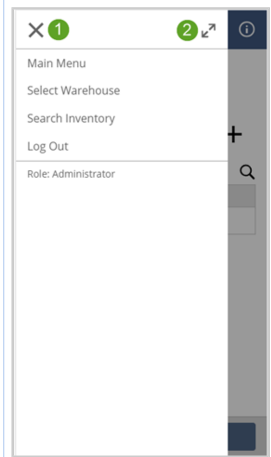
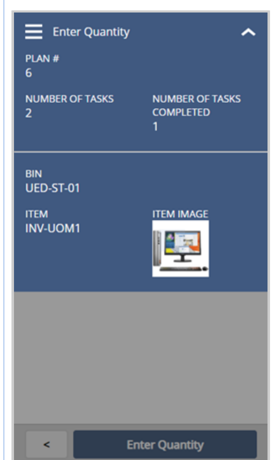
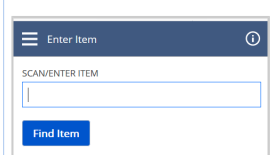
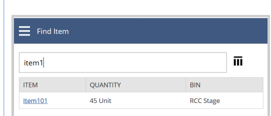
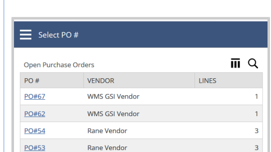
For example, to select purchase order 12345, enter **12345** in the **Scan/Enter PO # or Item** field.

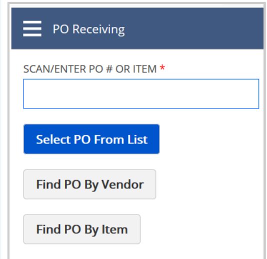
Tap **Enter PO/Item**.



Common Mobile Pages and Screens

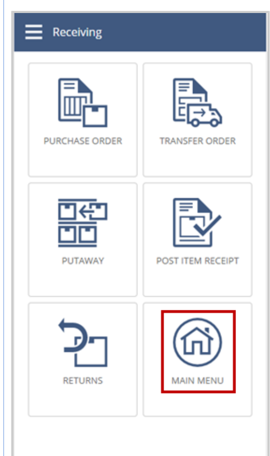
Common pages or screens appear for one or more mobile processes. These include the options menu, search pages, the information screen, and list pages.

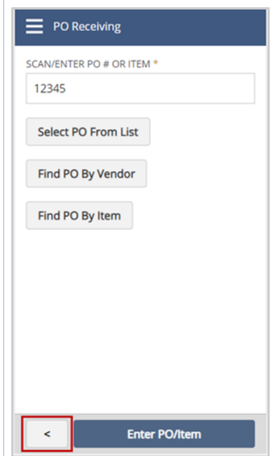
Page or Screen	Access	Example
Options Menu – The Options Menu contain links to the following common mobile pages and the logout option: ■ Main Menu ■ Select Warehouse ■ Search Inventory ■ Log Out Aside from the links, you can tap the following icons located at the top of the options menu: 1. **Close icon** – Closes the options menu. 2. **Expand icon** – Displays the Options Menu in full-screen mode.	At the top-left corner of a mobile page, tap the Menu icon.	
Information Screen – The Information Screen displays contextual information about a mobile process. The information varies depending on the input you provide as you complete the steps for a mobile process.	To expand the screen, at the top-right corner of a mobile page, tap the Info icon. To close the screen, tap the arrow icon or tap on the page outside of the information screen.	
Search Pages – You can access search pages to search for and select items or records. The search results show the list of available items or records, along with consolidated quantities. You can tap the item or record link you want to select. For example, during the Bin Transfer process, you search for an item contained in multiple bins. In the search results, NetSuite WMS displays the consolidated available quantity along with one of the bins.	On a mobile page, tap the **Find** button. 	
Select from List Pages – List pages display items, records, or transactions that you can select from. On a list page, you can tap the record or item link you want to select. If you want to refine the list, you can use the search tool. Entries in the list vary depending on the input required for the mobile process. For example, during the PO Receiving process, you want to view and select from the list of purchase orders. The list page displays only the open orders that are in Pending Receipt or Partially Received status.	On a mobile page, tap the **Select** button.	

Page or Screen	Access	Example
		

Screen Element Basics

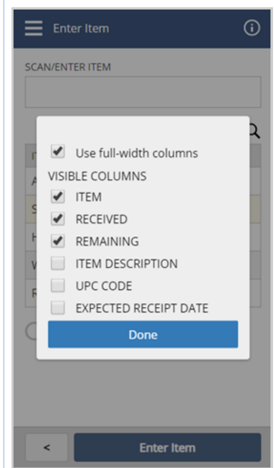
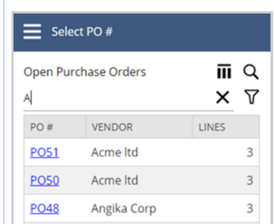
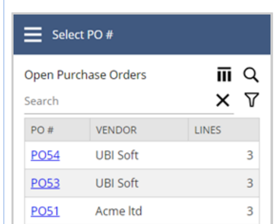
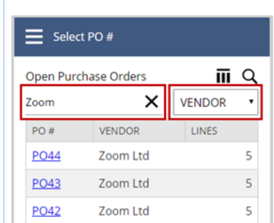
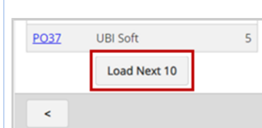
This section details how to work with NetSuite WMS using your mobile device.

Element	Example
Icons To select a menu item represented by an icon, tap the menu item icon. For example, to select Main Menu, tap the Main Menu icon.	
Hyperlinks Some text appears on the screen as selectable hyperlinks. Tap the hyperlink on the screen to select it. For example, to select an order, tap the hyperlinked order number.	

Element	Example
Buttons To select a button, tap the button on the screen. For example, to select Find PO By Vendor, tap that text on the screen. Be sure to tap a button only one time so the mobile device does not skip a step in the operation you are performing. To move to the previous page in a process, tap the back (<) button. Avoid using your browser's back button to move to a previous page.	

Tables

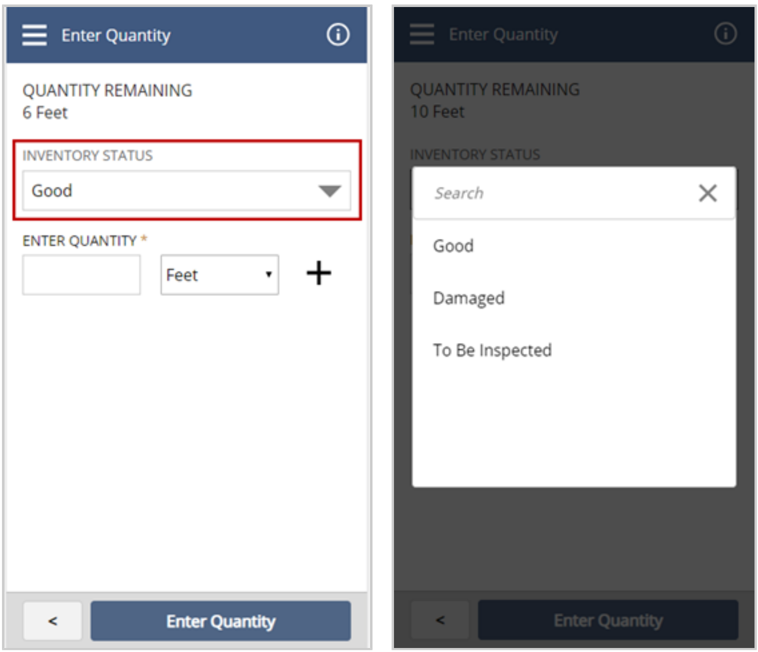
Data often appears in tables on mobile devices. You can work with tables in a few ways to search for data within them and to change the data that displays in tables.

Table Element	Example
1. Select which data columns you want to make visible in the table. You can also choose whether to use full-width columns. Check the box next to the columns you want to appear in the table. Clear the box next to columns you want to hide from the table.	
2. Access a search field to find data in tables. As you type text in the search field, NetSuite WMS filters the results in the table based on the entries that match the text you type. Results start to filter after you type one character.	
3. Delete the text in the search field.	
4. Open a dropdown field to filter your search results. For example, consider you want to find all purchase orders that still need to be received from a specific vendor. Select the search icon and enter the vendor name in search field, then select Vendor in the dropdown field.	
5. Load Next 10 Load the next set of entries in the table.	

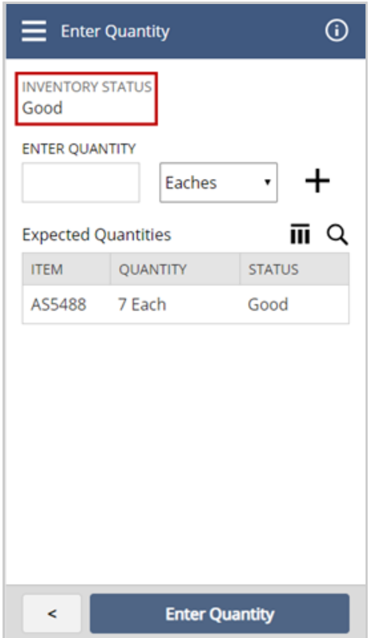
Inventory Status on Mobile Devices

If you use the Inventory Status feature, inventory status information appears in different ways on mobile device screens, depending on the process you are completing.

If you are adding an item to inventory or removing an item from inventory, NetSuite WMS prompts you to select the associated status for the item. For example, when you pick an item for an order, you select the status for the item you are picking from the bin location using the inventory status list:



If you are completing an action on an item for which the status has already been specified, the system shows inventory status information for reference. For example, if you are reversing a completed pick for an item, the item's inventory status appears when you confirm the reversal.

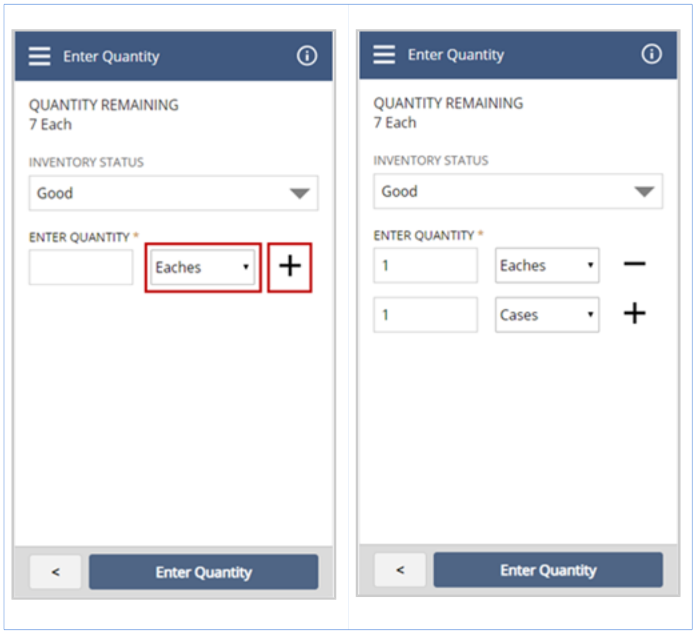


For more information, see the help topic Inventory Status.

Multiple Units of Measure (UOM) on Mobile Devices

When you pick or receive orders using mobile devices, you can enter item quantities using multiple units of measure (UOM). A units selector appears on picking and receiving screens to enable to you to enter item quantities in the unit set on the associated order. You can add one line item for each unit configured on the associated item record.

For example, consider that you are picking a sales order with an item that you sell in the units of cases and eaches, The item quantity on the sales order is seven eaches. When you pick the item quantity of seven using a mobile device, you can enter one in the available eaches unit selector and add a units selector to pick one case of six.



To use picking and receiving functionality, you must configure items to use multiple units of measure. For more information, see Creating Items for NetSuite WMS.

Mobile Device Transactions

When you complete warehouse transactions using a mobile device, NetSuite WMS creates records that capture information about the transaction. These records post real-time updates to your NetSuite account as you scan items throughout the warehouse.

WMS Open and Closed Task Records

A WMS open task record captures information such as the date, time, user, location, and action for each assigned transaction or task.

An open task record can have one of the following types of assigned tasks:

- CYCC – completing cycle counts
- MOVE – moving inventory
- PUTW – putting away items for an inbound order
- RPLN – replenishing inventory
- XFER – transferring items

For example, if you receive an item to a staging location using a mobile device, the system creates an open task record with the type PUTW to track the following:

- the start and end time of the putaway action
- the bin location
- the item quantity information

After you complete the transaction associated with an open task record, the system converts WMS open task records to WMS closed tasks.

Searching for Open or Closed Task Records

On any purchase order, transfer order, or customer return authorization, click the NS WMS subtab to view WMS open and closed tasks.

To view a list of WMS open and closed records, you can use the global search feature. For example, you can search for a list of open putaway task records.

To search for an open or closed task record:

1. In the global search box, type WMS Open Task.
2. Next to the WMS Open Task page search result, click **View**.
3. At the top-right corner of the page, click **Search**.
4. In the box below the **Task Type** field, select the task type for which you want to search (for example, PUTW).
5. Click **Submit**.

WMS Lock Records

NetSuite WMS uses lock records to prevent two warehouse operators from processing the same transaction or task at the same time.

For example, when you begin to receive a line item on a purchase order, the system creates a WMS lock record with a lock status of true, or locked, for that line item. If another user starts to receive the same purchase order, the locked line item you are receiving does not appear on their mobile device. When you complete the transaction, the lock status on the lock record updates to false, or unlocked.

In some cases, the system might not unlock lock records as expected. A periodic script runs to unlock incorrectly locked records.

To view a list of WMS lock records:

1. In the search field, enter WMS Lock Records.
2. Next to the WMS Lock Records search result, click **View**.
3. If necessary, to manually unlock the record, set the **Lock Flag** field to **F**.
4. Click **Save**.

Inbound Processing

Inbound processing is the receiving and putaway of items into your warehouse. It includes the receiving, staging, and putaway of items from incoming orders.

Depending on your business processes, the tasks you complete to process inbound orders might vary. The following topics describe the inbound processes you can complete using NetSuite WMS.

- Receiving Orders
- Receiving Inbound Shipment Orders
- Item Receipts
- Item Putaway

Receiving Orders

Items might arrive at your warehouse for a number of reasons:

- Vendors send ordered items.
- Other warehouse locations transfer items to your warehouse.
- Customers send authorized returns.

You receive purchase order items from vendors and suppliers. You receive transfer order items from your company's various warehouse locations. You receive return authorization items as returns from customers.

Before you can receive items into your warehouse, you must enter and approve purchase orders, transfer orders, or return authorizations in NetSuite. These transactions track the purchase, transfer, return, and receipt of items to your warehouse.

For more information about entering these orders, see the following topics:

- Entering a Purchase Order
- Entering a Transfer Order
- Return Authorization (RMA) Forms

WMS Mobile – Returning Items (RMA)

NetSuite WMS recognizes and enables you to process only the transactions that meet the following conditions:

- All orders must be approved.
- The warehouse location for an order must be the same as the warehouse location you select on a mobile device. For transfer orders, it must be the same as the to location or the receiving warehouse.
- Purchase orders and transfer orders must have the Pending Receipt or Pending Billing/Partially Received status. Customer returns orders must have the Pending Receipt or Pending Refund/Partially Received status.
- If you use the Centralized Purchasing and Billing feature, you can receive centralized purchase orders on your mobile device. On purchase orders, make sure you select the target subsidiary and target location in the order lines. Restrictions and limitations that apply to this feature also applies to receiving centralized purchase orders on a mobile device. For more information, see the help topic Centralized Purchasing and Billing.

- Centralized purchase orders do not support drop shipments and special orders. They do not appear on inbound shipment records.

Depending on the system rules you use, you can receive items to a staging location or put them away directly to their storage locations as you receive them. For more information, see System Rules for NetSuite WMS.

WMS Mobile Receiving Purchase Orders

To receive a purchase order, transfer order, or customer return:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Main Menu**.
2. On the Main Menu page, tap **Receiving**.
3. On the Receiving page, depending on the type of transaction you want to process, tap **Purchase Order**, **Transfer Order**, or **Returns**.

   The Receiving page for the specific transaction type appears.
4. To choose an order, do one of the following:

   > **Note:** The field names and options on this page vary depending on the transaction type.

   - In the **Scan/Enter PO # or Item** field, scan or enter the transaction number or item. If you enter the data, tap **Enter Item** to proceed.
   - To select from the list of transactions, tap **Select PO From List**, and then tap the transaction you want to process.

   Alternatively, to find and select a purchase order, do either of the following:

   - To select from the list of vendors, tap **Find PO By Vendor**, and then tap the vendor name.

     > **Tip:** If you do not find the vendor from the list, you can search by vendor name by clicking the search icon.

   - To search for an order by item name, number, or UPC, tap **Find PO By Item**.
5. On the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item name, number, or UPC. If you enter the data, tap **Enter Item** to proceed.
   - To select from the list of items, tap the item name or number.

     > **Tip:** If you do not find the item from the list, you can view the list of fully received items per order by tapping **Show Completed**.
6. For lot-numbered items, on the **Enter Lot** page, do the following:
   a. In the **Scan/Enter Lot** field, scan or enter the lot number.
   b. (Optional) In the **Expiry Date** field, enter the expiry date of the lot item.
   c. Tap **Enter Lot**.
7. On the Enter Quantity page, do the following:
   a. If you use the Inventory Status feature, in the **Inventory Status** field, select the status of the item.
   b. In the **Enter Quantity** field, enter the number of items you want to receive.
   c. (Optional) If your warehouse location does not use bins and you want to view the list of stock locations associated with the item, tap the **Show Stock Locations** toggle.

d. (Optional) If you have set up mobile printing and want to manually print item or pallet labels, tap **Print**.

> **Tip:** For serialized items, if you want to print labels with serial numbers, proceed to step 8.

For more information about mobile printing, see Manually Printing Labels from Your Mobile Device.

e. Tap **Enter Quantity**.

8. For serialized items, on the Enter Serial Number page, do the following:
   a. In the **Scan/Enter Serial Numbe** r field, scan or enter a serial number for the item.
   b. (Optional) To manually print an item label with the serial number, tap **Print**.

      For instructions on mobile printing, see Manually Printing Labels from Your Mobile Device.
   c. Tap **Enter Serial Number**.

   Repeat steps a – c to enter another serial number.
9. For warehouse locations that use bins, on the Enter Bin page, do one of the following:
   - In the **Scan/Enter Bin** field, scan or enter the number of the destination bin. If you enter the data, tap **Enter Bin** to proceed.
   - To select from the list of destination bins, tap the bin number.

If you have more items to receive from the same order, the Enter Item page appears. Otherwise, a message appears to confirm that you have received all the items.

If you do not post item receipts manually, NetSuite WMS automatically generates item receipts for the received items. It also updates the status and item's received quantity in the associated order transaction. For more information about posting item receipts, see Item Receipts.

Receiving Inbound Shipment Orders

If you use the Inbound Shipment Management feature, you can receive orders and create item receipts for inbound shipments on a mobile device. As you process inbound shipments, NetSuite WMS automatically updates associated transactions and inventory details on item records. For more information about the inbound shipment feature and requirements, see the help topic Inbound Shipment Management.

> **Important:** To receive inbound shipment orders for lot-numbered and serialized items, items that use bins, or items with inventory status, you must enable the Inventory Detail on Inbound Shipment feature. Before you can enable this feature, you must contact NetSuite Customer Support to provision this feature for your NetSuite WMS account. To enable the Inventory Detail on Inbound Shipment feature after it has been provisioned, see Enabling Features for NetSuite WMS.

NetSuite WMS provides the Receive All option that enables you to receive all orders on an inbound shipment at the same time. You can receive all expected lots or serialized items if the inbound shipment records are populated with inventory details. To use this option, you must activate the Enable Receive All option for inbound shipments system rule. See System Rules for NetSuite WMS.

Note the following limitations and guidelines when receiving inbound shipment orders on a mobile device:

- You can receive inbound shipments in In Transit status. To view the general conditions for receiving orders on a mobile device, see the help topic Receiving Orders.
- To enter items that you want to receive, you can scan GS1 bar codes, but not composite bar codes. For more information about bar code scanning, see Bar Code Setup for NetSuite WMS.
- When you receive inbound shipment orders, you cannot yet view any vendor details from the associated purchase order, which becomes available only after you enter an item.
- When you activate the Manually post item receipts? system rule, you must post an item receipt record after you receive the inbound shipment. For more information, see Manually Posting Item Receipts.
- If you activate the Stage received items before putting away? system rule, you select inbound staging bins, instead of storage bins, during the receiving process. After you receive items, you can stage them first, before you put them away. See System Rules for NetSuite WMS.
- For lot-numbered items, you can receive a partial quantity of an item when you choose the Select Bin option.

To receive inbound shipment orders:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Main Menu.**
2. On the Main Menu, tap **Receiving**.
3. On the Receiving page, tap **Inbound Shipment**.
4. On the Inbound Shipment page, do one of the following:
   - In the **Scan/Enter Shipment/Doc # or Item** field, scan or enter the shipment number, external document number, or item name/number. If you enter the data, tap **Enter Shipment/Doc # or Item** to proceed.
   - To select from the list of inbound shipments, tap **Select Shipment From List**.
   - To search for and select the shipment associated with an item, tap **Find Shipment By Item**.
5. On the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item name/number. If you enter the data, tap **Enter Item** to proceed.
   - To select from the list of items, tap the item name or number.

   > **Tip:** If you cannot find the item, you can view the list of received items by tapping **Show Completed**. If you want to receive all items in the inbound shipment at the same time, tap **Receive All**, and then proceed to step 9 to enter the bin details.
6. For lot-numbered items, on the Enter Lot page, do the following:

   > **Note:** If you entered a partial quantity for a lot item, you are redirected to this page on which you can enter another lot number. If you want to continue to process the partial quantity, tap **Select Bin**. Then, proceed to step 9. If your warehouse location does not use bins and you want to receive another item, tap **Skip**.

   a. In the **Scan/Enter Lot** field, scan or enter the lot number.

      > **Tip:** If you want to receive all expected lots in the inbound shipment at the same time, tap **Receive All**, and then proceed to step 9 to enter the bin details.

   b. (Optional) In the **Expiry Date** field, enter the expiry date of the lot item.
   c. Tap **Enter Lot**.
7. On the Enter Quantity page, do the following:

a. (Optional) If you use the Inventory Status feature, in the **Inventory Status** field, select the status of the item.

b. In the **Enter Quantity** field, enter the number of items you want to receive.

c. (Optional) If your warehouse location does not use bins and you want to view the list of stock locations associated with the item, tap the **Show Stock Locations** toggle

d. (Optional) If you have set up mobile printing and want to manually print item or pallet labels, tap **Print**.

> **Tip:** For serialized items, if you want to print labels with serial numbers, proceed to step 8.

For more information about mobile printing, see Manually Printing Labels from Your Mobile Device.

e. Tap **Enter Quantity**.

> **Note:** If you have entered a partial quantity of a lot item, you are redirected to the Enter Lot page. See step 6.

8. For serialized items, on the Enter Serial Number page, do the following:

a. In the **Scan/Enter Serial Number** field, scan or enter a serial number for the item.

b. (Optional) To manually print an item label with the serial number, tap **Print**.

For instructions on mobile printing, see Manually Printing Labels from Your Mobile Device.

c. Tap **Enter Serial Number**.

Repeat this step to enter another serial number.

9. For warehouse locations that use bins, on the Enter Bin page, do one of the following:

- In the **Scan/Enter Bin** field, scan or enter the number of the destination bin. If you enter the data, tap **Enter Bin** to proceed.
- To select from the list of destination bins, tap the bin number.

If you have other orders in the inbound shipment, the Enter Item page appears. Inbound shipments that have similar items from different purchase orders must also be received separately. To receive other orders, repeat steps 5 – 7.

If you have received all the items on the inbound shipment, the Shipment Received page appears and displays the confirmation message.

10. On the Shipment Received page, do one of the following:

- To receive another inbound shipment, tap **Receive Next Shipment**.
- To manually post item receipts for this inbound shipment or exit Inbound Shipment, tap **Main Menu**.

If you do not post item receipts manually, NetSuite WMS automatically generates one item receipt for each purchase order associated with the inbound shipment. It also updates the status and item's received quantity in both the purchase order and inbound shipment record. For more information about posting item receipts, see the help topic Item Receipts.

Item Receipts

An item receipt transaction records the receipt of items into your warehouse and links to the appropriate transfer order, purchase order, or return authorization as a related record. When you post an item receipt, the system marks the item on the linked order as received and updates the stock level for the warehouse for the appropriate bin location.

WMS Mobile Posting Item Receipts

To process item receipts in NetSuite WMS, see the following topics:

- Enabling Deferred Item Receipt Posting
- Manually Posting Item Receipts
- Reversing Completed Item Receipt Transactions

Enabling Deferred Item Receipt Posting

By default, NetSuite WMS automatically posts one item receipt for each item after you receive it. If you want to prevent NetSuite WMS from automatically posting item receipts upon receipt, you can enable deferred item receipt posting through a system rule.

To enable deferred item receipt posting:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Warehouse > System Rules.
3. Do one of the following:
   - To enable deferred item receipt posting for all warehouse locations, click **Edit** next to **Manually post item receipts?**.
   - To enable deferred item receipt posting to accommodate a business exception that applies to one warehouse location only, complete the following steps:
     1. Click **View** next to **Manually post item receipts?**.
     2. In the **Actions** menu, click **Make Copy**.
     3. In the **Name** field, enter **Manually post item receipts?**.
     4. In the **Location** field, select the appropriate warehouse location or warehouse sublocation.
4. In the **Rule Value** field, enter **Y**.
5. Check the **Active** box.
6. Click **Save**.

Manually Posting Item Receipts

When you enable deferred item receipt posting, you must manually post item receipts after you receive or put away items. For more information about deferred item receipt posting, see Enabling Deferred Item Receipt Posting.

To manually post an item receipt:

1. On your mobile device, tap the menu icon at the top-left corner of the screen.
2. Tap **Main Menu**.
3. On the Main Menu page, tap **Receiving**.

4. On the Receiving page, tap **Post Item Receipt**.
5. On the Select Receipt Type page, tap **Purchase Order**, **Transfer Order**, **Inbound Shipment**, or **RMA Receipt**, depending on the type of order you are receiving.
6. On the Select PO # page, tap the order for which you are posting the item receipt.

   The name at the top of this page might be Select PO #, Select TO #, Select Shipment, or Select RMA #, depending on the type of order you have selected on the Select Receipt Type page.
7. On the Receipt Details page, review the data displayed in the Items in Receipt table.
8. Tap **Post Item Receipt**.

When you manually post an item receipt, NetSuite WMS posts one item receipt for all items received for the order since the last item receipt was posted for the order.

For example, consider an order with three line items and a posted item receipt after one line item was fully received. If you do not post another item receipt until the remaining two line items are received, the item receipt will have two line items.

Reversing Completed Item Receipt Transactions

You can reverse item receipt transactions generated through the mobile receiving process. You can choose to reverse line items across single or multiple purchase orders, transfer orders, or return merchandize authorizations (RMA). For more information about mobile receiving, see Receiving Orders.

You can reverse entire line items only. You cannot process partial line item reversals.

> **Note:** Reversals for item receipts associated with inbound shipments are not supported.

When you reverse an item receipt, you remove the received item quantities from the bin locations from which they were received or put away. If bins have no sufficient quantity from which to deduct received items, you cannot proceed with the reversal, to prevent negative inventory.

You can reverse completed item receipt transactions using only the NetSuite WMS user interface.

To reverse a completed item receipt transaction using the NetSuite WMS user interface:

1. Using the Warehouse role, go to Receiving > Receiving > Inbound Reversal.
2. On the Inbound Reversal page, do the following:
   a. In the **Transaction Type** field, select whether you want to reverse an item receipt for a purchase order, transfer order, or return authorization.
   b. In the **Location** field, select the transaction's location.

      For the transfer orders, select the to location or receiving warehouse location.
   c. In the **Transaction #** field, enter the number of the transaction.
   d. Click **Display**.
3. On the **Item List** sublist, in the **Confirm** column, check the box next to each item receipt you want to reverse.
4. Click **Submit**.

Reversed item receipts are removed from the associated transaction, and deleted. The transaction returns to a pending receipt state.

Item Putaway

After you receive an item, you need to place the item in the warehouse for storage until you ship it out. This process is called putaway. After you put away an item, its inventory count increases in the appropriate bin locations. If you put away a lot numbered or serialized item, the system updates the item's lot number or serial number details in the appropriate bin location. An item is available for allocation to sales orders or transfer orders after you put it away to a storage location. For more information, see Putaway Strategies and Putting Away Items.

If you use carts to move and putaway your items, see Putting Away Items Using Carts.

Depending on your account configuration, you can put away items from a staging bin location to a storage bin location or directly from the incoming truck to the storage bin location. For more information, see Enabling Staging at Receiving.

Putaway Strategies

Putaway strategies define where an item should be put away after you receive it. If you include zones in a putaway strategy, you can prioritize zones that contain the bins NetSuite WMS suggests during the Putaway process only.

For information about creating putaway strategies, see Defining Putaway Strategies.

NetSuite WMS suggests storage bin locations for putting away an item using the following sorting process:

1. Get values from the following fields on the item record: Item Group, Item Family, ABC Velocity, WMS Mix Lot, WMS Mix Item, and Preferred Bin.
2. Find all valid putaway strategies with criteria that match the item.
3. From each valid strategy, get the warehouse zone and sequence number values.
4. For strategies with zones, sort the warehouse zones based on the sequence number of their associated strategy, in ascending order
5. From the zone or item in each valid strategy, find all associated bins, applying the following restrictions:
   - If the item configuration allows mixed items, find all associated bin locations.
   - If the item configuration does not allow mixed items, find only the associated bin locations for the selected item.
   - If the item configuration allows mixed lots, find all associated bin locations.
   - If the item configuration does not allow mixed lots, find only the associated bin locations for the selected lot.
6. For each valid strategy, sort the bins based on the putaway sequence number on the bin record, in ascending order.
7. Generate the list of bin suggestions:
   a. Place any preferred bins at the top of the list.
   b. Include the groups of sorted bins, following the sequence number of their associated strategies, in ascending order. Within each subgroup per strategy, place the bins with available quantity before any empty bins. Consider the following conditions:
      - If the item configuration allows mixed items, place bins with mixed items after the empty bins.

- If the Inventory Status feature is enabled and set it on a strategy, include only the bins with items that match the inventory status of the item to be put away. This applies to preferred bins and the sorted bins.

On your mobile device, you can view the list of sorted bins when you put away items. The following table shows two sample bin lists for items that allow and do not allow mixed items in bins:

Bin List if Mix Items Flag = T	Bin List if Mix Items Flag = F
Preferred Bin - Item	Preferred Bin - Item
(Bins from Putaway Strategy 1 - with or without zones) Bin 1 - Item Bin 2- Item Bin 3- Item Bins with zero qty Bin 10 Bin 11	(Bins from Putaway Strategy 1 - with or without zones) Bin 1 - Item Bin 2- Item Bin 3- Item Bins with zero qty
(Bins from Putaway Strategy 2 - with or without zones) Bin 4 - Item Bin 5- Item Bin 6- Item Bins with zero qty Bin 12 Bin 13	(Bins from Putaway Strategy 2 - with or without zones) Bin 4 - Item Bin 5- Item Bin 6- Item Bins with zero qty
All bins with the Item tag or suffix contain the item you want to put away.	
Bins with other items that can be mixed are placed at the bottom of the list, after the empty bins.	Bins with other items are not included in the list.

Enabling Staging at Receiving

By default, NetSuite WMS suggests storage bin locations when you receive purchase orders and customer returns. This capability enables you to put away items directly to their storage bin locations as you receive them. If you want to receive items to a staging area before you put them away, you can enable staging at receiving.

To enable staging at receiving:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Warehouse > System Rules.
3. Do one of the following:
   - To enable staging at receiving for all warehouse locations, click **Edit** next to **Stage received items before putting away?**.
   - To enable staging at receiving to accommodate a business exception that applies to one location only, complete the following steps:

   1. Click **View** next to **Stage received items before putting away?**.
   2. In the **Actions** menu, click **Make Copy**.
   3. In the **Name** field, enter **Stage received items before putting away?**.
   4. In the **Location** field, select the appropriate warehouse location or warehouse sublocation.
4. In the **Rule Value** field, enter **Y**.
5. Check the **Active** box.
6. Click **Save**.

For more information, see System Rules for NetSuite WMS.

Putting Away Items

When you put away an item, you are moving the item from a staging location to a storage location.

WMS Mobile Putaway Items

If you activate the Tally Scanning rule, you can scan item bar codes to enter each quantity that you want to put away. You can tally scan a bar code for the item, item alias, or UPC. For numbered items, you can tally scan a bar code for a lot or serial number. If you also activate the Advanced Bar Code rule, you can tally scan an item bar code in the supported GS1 formats. You can scan a numbered item's GS1 bar code that contains the lot or serial number. For more information, see System Rules for NetSuite WMS.

To put away an item:

1. On your mobile device, tap the menu icon at the top-left corner of the screen.
2. Tap **Main Menu**.
3. On the Main Menu page, tap **Receiving**.
4. On the Receiving page, tap **Putaway**.
5. On the Enter Staging Bin/Item page, do one of the following:
   - In the **Scan/Enter Staging Bin/Item** field, scan or enter the item you are putting away, and then tap **Enter Staging Bin/Item**.
   - In the **Scan/Enter Staging Bin/Item** field, scan or enter the staging bin location from which you are transferring items and tap **Enter Staging Bin/Item**.
   - To select from the list of bins, tap the number of the staging bin from which you want to transfer items.
6. If you enter the item you want to put away in the previous step, now enter the staging bin location from which you want to transfer the item.

   If you enter the staging bin location from which you want to transfer an item, now enter the item you want to put away.
7. For lot items, on the Enter Lot page, enter values in the following fields:
   - In the **Scan/Enter Lot** field, scan or enter the item's lot number. If you enter the data, tap **Enter Lot**.
   - From the Expected Lots list, tap the lot number.
   - To transfer all the lot items in the Expected Lots list, tap **Put Away All**.
8. On the Enter Quantity page, depending on the features and rules you use, enter or select values in the following fields:

a. **Inventory Status** – (Optional) If you use the Inventory Status feature, you can select a status for items associated with different statuses.

> **Tip:** To display the Status column on the table, tap the table icon. From the Visible Columns list, tap **Status**. Then, tap **Done**.

b. To enter the quantity, do one of the following:

- **Enter Quantity** - Enter the quantity you want to put away. Beside the field, you can change the unit for items associated with multiple units.

  Alternatively, to put away all the items shown on the Expected Quantities table, tap **Put Away All.**

- **Tally Scan Item**, **Tally Scan Lot #/Item**, or **Tally Scan Serial** - Before you scan an item bar code, make sure you leave the Enter Quantity field blank and select the correct unit. You cannot change the unit after you scan the first item bar code. You can also verify that the correct inventory status is selected, as described in step 8.a. You can change the status after each tally scan.

  Repeat this step to scan each item. The value in the Enter Quantity and Remaining Quantity fields adjusts automatically. For numbered items, you can tally scan item bar codes with the lot or serial numbers displayed in the Expected items table. If you tally scan the entire quantity, you are redirected to the Enter To Bin page. Proceed to step 10.

c. To save the quantity, tap one of the following buttons:

- **Enter Quantity** - Saves a manually entered quantity.
- **Done** - Saves a partial tally scanned quantity.

9. For serialized items, on the Enter Serial Number page, scan or enter the serial number in the field. If you enter the data, tap **Enter Serial Number** to proceed.

   Repeat this step to enter all the serial numbers for the total quantity. If you have remaining quantity to put away, you are redirected to the Enter Quantity page. You can enter the quantity for another inventory status. Repeat from step 8.

10. On the Enter To Bin page, you can enter or select values in the following fields:

- **Inventory Status** – (Optional) If you use the Inventory Status feature, you can select a status for items associated with different statuses.

  > **Tip:** To display the Status column on the table, tap the table icon. From the Visible Columns list, tap **Status**. Then, tap **Done**.

- **Scan/Enter To Bin** – Scan or enter the destination bin. If you enter the data, tap **Enter To Bin** to proceed.
- Alternatively, from the list of bins, tap the bin.

The confirmation page appears with the status of the item putaway.

Putting Away Items Using Carts

For warehouses with bins, you can load received and staged items onto a cart to move them to their destination bin locations. After you post an item receipt for a purchase order, you can move the items from the inbound staging bin onto a cart. Then, you can put away or transfer the items to their storage bins.

If you activate rules, such as Tally Scan and Enable bulk loading, the process flow may vary when you put away items from your mobile device. For more information, see System Rules for NetSuite WMS.

Step A. Loading Items onto a Cart

Start the putaway process by transferring the received items onto a cart. If you have existing items on a cart and you want to put them away, proceed to step B.

To load items onto a cart:

1. On the Main Menu page, tap **Receiving**.
2. On the Receiving page, tap **Putaway**.
3. On the Putaway page, tap **Cart Moves**.
4. On the Enter Cart page, do one of the following:
   - In the **Scan/Enter Cart** field, scan or enter the name of the cart to which you want to add the received items. If you enter the data, tap **Enter Cart** to proceed.
   - From the Carts list, tap the name of the cart you want to select.
5. On the Enter Staging Bin/Item page, do either of the following:
   - In the **Scan/Enter Staging Bin/Item** field, scan or enter the item or inbound staging bin. If you enter the data, tap **Enter Staging Bin/Item** to proceed.
   - From the Staging Bins list, tap the staging bin name or number.
6. If you entered the bin, on the Enter Item page, do one of the following:
   - **In the Scan/Enter Item** field, scan or enter the item name, number, UCC, GS1 or composite item bar code, or alias. If you enter the data, tap **Enter Item** to proceed.
   - From the Items list, tap the item name or number.
   - If you want to change the staging bin, tap **Change Staging Bin**. To select a different inbound staging bin, see step 5.
   - If you activate the Enable bulk loading rule and want to transfer multiple items into a staging cart, tap **Bulk Load**. On the Select Items page, tap the box next to the items you want to transfer, and then tap **Load Into Cart**. If you have remaining items from the same cart, you are redirected to the Cart Details page. See step B5. Otherwise, the summary page appears.
   - If you are redirected from the Enter Quantity, Enter Lot, or Enter Serial Number page, and you want to put away the partial or loaded quantity of items, tap **Putaway**. Proceed to step B5.

   > **Tip:** From the message at the top of the page, tap the cart name or number. The Items Added to Cart popup window appears from which you can view the item details.

7. If you entered the item, on the Enter Bin page, do one of the following:
   - In the **Scan/Enter Bin** field, scan or enter the inbound staging bin that contains the received item. If you enter the data, tap **Enter Bin** to proceed.
   - From the list of staging bins, tap the bin name.
8. For lot items, on the Enter Lot page, do one of the following:
   - In the **Scan/Enter Lot** field, scan or enter the lot number. If you enter the data, tap **Enter Lot** to proceed.
   - From the Expected Lots list, tap the lot number.
   - If you want to add the entire quantity of all expected lots, tap **Load All**. You are redirected to the Enter Item page. See step 6.
   - If you are redirected from the Enter Quantity page and you want to add the partial quantity of lot items to the cart, tap **Skip**. You are redirected to the Enter Item page. See step 6.
9. On the Enter Quantity page, do the following:

> **Tip:** If you use Tally Scanning, you can scan the item bar codes until you reach the quantity you want to process. For lot or serialized items, enter or scan the lot or serial number after each item scan. If you have no remaining items to process, you are forwarded automatically to the next page.

a. In the **Enter Quantity** field, enter the quantity you want to put away.

b. (Optional) To change the default unit of an item associated with multiple units, in the field beside the **Enter Quantity** field, select the item's unit.

c. (Optional) If you use the Inventory Status feature, in **the Inventory Status** field, you can select the status of the item.

d. Tap **Enter Quantity**.

> **Tip:** For serialized items, if you want to add all the serialized items to the cart, tap **Load All**. You are redirected to the Enter Item page. See step 6.

If you entered a partial quantity, you are redirected to either of these pages: the Enter Item page for regular items (see step 6) or the Enter Lot page for lot items (see step 7).

10. For serialized items, in the **Scan/Enter Serial Number** field, scan or enter the serial number. If you enter the data, tap **Enter Serial Number** to proceed.

    From the Available Serial Numbers list, view and copy the serial number.

    Repeat this step to enter all the serial numbers for the total quantity you want to load onto the cart. If you entered a partial quantity, you are redirected to the Enter Item page. See step 6.

You can unload the items from your cart and put them away for storage. See Manually Printing Labels from Your Mobile Device.

Step B. Putting Away Items from a Cart

After you load received and staged items onto a cart, you can transfer them to their storage bin locations.

If the cart contains multiple lot and serialized items, you can use the Put Away All option. You can put away all serialized items, all lot items, or both from the cart into a single bin. Make sure that all the items are configured to allow mixing items within the same bin. See Creating Items for NetSuite WMS.

To put away items from a cart:

1. On the Main Menu page, tap **Receiving**.

   If you are already on the Cart Details page, continuing from step A, you can proceed to step 5.

2. On the Receiving page, tap **Putaway**.
3. On the Putaway page, tap **Cart Moves**.
4. On the Enter Cart page, from the Carts list, tap the name of the cart that contains the received items you want to put away.
5. On the Cart Details page, do one of the following:
   - In the **Scan/Enter To Bin or Item** field, scan or enter the item or destination bin. If you enter the data, tap **Enter Item/Bin** to proceed.
   - From the Items on Cart list, tap the item name or number.
   - If you want to add more items to the cart, tap **Add Item**. You are redirected to the Enter Staging Bin/Item page. See step A5.

6. If you entered the item, on the Enter To Bin page, do one of the following:
   - In the **Scan/Enter To Bin** field, scan or enter the storage bin name or number. If you enter the data, tap **Enter Bin** to proceed.
   - In the **Recommended Bin** field or from the list of storage bins, tap the bin name or number.
7. If you entered the bin, on the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item. If you enter the data, tap **Enter Item** to proceed.
   - From the Items on Cart list, tap the item you want to select.
   - For lot or serialized items, if you want to transfer all the items from the cart into the same bin, tap **Put Away All**. On the Put Away All page, review the putaway details, and then tap **Confirm** to proceed. Skip the rest of the steps.
8. For lot items, on the Enter Lot page, do one of the following:
   - In the **Scan/Enter Lot** field, scan or enter the lot number. If you enter the data, tap **Enter Lot** to proceed.
   - From the Expected Lots list, tap the lot number.
   - If you want to transfer the entire quantity of lot items into the same bin, tap **Put Away All**. On the Put Away All page, review the putaway details, and then tap **Confirm** to proceed. Skip the rest of the steps.
9. If you use the Inventory Status feature and the item has different statuses, on the Select Status page, tap the status from the list.

   Alternatively, to put away all the quantities shown in the list, tap **Putaway All**. On the Put Away All page, review the putaway details, and then tap **Confirm** to proceed. Skip the rest of the steps.
10. On the Enter Quantity page, do the following:
    a. In the **Enter Quantity** field, enter the number of items you want to put away.

       Tip: For serialized items, if you want to transfer the entire quantity of serialized items into the same bin, tap **Put Away All**. On the Put Away All page, review the putaway details, and then tap **Confirm** to proceed. Skip the rest of the steps.

    b. (Optional) In the **Inventory Status** field, you can select the status of an item associated with different statuses.
    c. Tap **Enter Quantity**.
11. For serialized items, on the Enter Serial Number page, in the **Scan/Enter Serial Number** field, scan or enter the serial number. If you enter the data, tap **Enter Serial Number** to proceed.

    From the Available Serial Numbers list, view and copy the serial number.

    Repeat this step to enter all the serial numbers for the total quantity you want to load onto the cart.

A summary page appears to display the putaway details. If you have remaining items in the cart to put away, tap **Next Putaway**. You can do the same if you want to use the same cart to move other items. You are redirected to the Cart Details page. Start from step 5.

Inventory Processing

Manage received inventory throughout its lifecycle within the warehouse. On the Netsuite WMS user interface or your mobile device, you can complete the following tasks for inventory processing:

- Inventory Transfers
- Searching for Inventory
- Creating Inventory
- Inventory Counts
- Work Order Picking
- Replenishment
- Changing the Inventory Status of Items

Inventory Transfers

Bin or inventory transfers enable you to transfer inventory between storage bins or warehouse locations, respectively. For both types of transfers, NetSuite WMS can apply putaway strategies that you define to recommend destination bins for warehouse locations that use bins. When you transfer inventory, it decreases the stock level for the source bin location and increases the stock level for the destination bin location.

If you use Manufacturing Mobile with Warehouse Management, you can transfer items to WIP bins that you set up for Manufacturing Mobile. To set up these WIP bins, see Creating Bin Locations or Carts or Creating a WIP Bin for Manufacturing Mobile.

For more information, see the following topics:

- Transferring Items Between Bin Locations
- Inventory Transfers Between Warehouse Locations

Transferring Items Between Bin Locations

Use a bin transfer to transfer items between storage bins or between inbound staging bins. You cannot transfer items from a storage bin location to a staging bin location. To transfer items from a staging bin to a storage bin location, use the putaway process. For more information, see Item Putaway.

On your mobile device, when you transfer items between bins, NetSuite WMS creates a bin transfer record to update the item's inventory details.

Mobile Bin Transfer

If you activate the Tally Scanning rule, you can scan item bar codes to enter each quantity that you want to transfer. You can tally scan a bar code for the item, item alias, or UPC. For numbered items, you can tally scan a bar code for a lot or serial number. If you also activate the Advanced Bar Code rule, you can tally scan an item bar code in the supported GS1 formats. You can scan a numbered item's GS1 bar code that contains the lot or serial number. For more information, see System Rules for NetSuite WMS.

To transfer items between bin locations:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Main Menu**.
2. On the Main Menu page, tap **Inventory**.
3. On the Inventory page, tap **Bin Transfer**.
4. On the Bin Transfer page, scan or enter either the item you want to transfer or the bin location from which you want to transfer an item. If you enter the data, tap **Enter From Bin/Item** to proceed.

   > **Tip:** To search for an item by name or number, tap **Find Item**. You can select an item from the search results.

   Depending on your entry, the Enter From Bin or Enter Item page appears.
5. If you entered the item, enter the bin location from which you are transferring the item. Alternatively, to select from the list of bins, tap the **Show all bins** toggle, and then tap the bin number.

   If you entered the bin, enter the item you want to transfer. Alternatively, to select from the list of items, tap the item name or number.
6. For lot-numbered items, on the Enter Lot page, do one of the following:
   - In the **Scan/Enter Lot** field, scan or enter the item's lot number. If you enter the data, tap **Enter Lot** to proceed.
   - To select from the list of lot number, tap the lot number.
   - If you have multiple lot numbers and you want to transfer all of them, tap **Transfer All**. Proceed to step 9.
7. On the Enter Quantity page, depending on the features and rules you use, do the following:
   a. **Inventory Status** – (Optional) If you use the Inventory Status feature, you can select a status for bins that contain an item with different statuses.

      > **Tip:** To display the Status column on the Expected Quantities table, tap the table icon. From the Visible Columns list, tap **Status**. Then, tap **Done**.

   b. To enter the quantity, do one of the following:
      - **Enter Quantity** - Enter the quantity you want to transfer. Optionally, beside this field, you can select the unit for an item associated with multiple units.
      - **Tally Scan Item**, **Tally Scan Lot#/Item**, or **Tally Scan Serial** – Before you scan an item bar code, make sure you leave the Enter Quantity field blank and select the correct unit. You cannot change the unit after you scan the first item bar code. You can also verify that the correct inventory status is selected, as described in step 7.a. You can change the status after each scan.

        Repeat this step to scan each item. The value in the Enter Quantity and Remaining Quantity fields adjusts automatically. If you tally scan the entire available quantity, you are redirected to the Enter To Bin page. Proceed to step 9.
   c. To save the quantity or proceed, tap one of the following buttons:
      - **Enter Quantity** - Save the manually entered quantity.
      - **Done** - Saves the partial tally scanned quantity.
      - **Transfer All** - For serialized items, tap this button to transfer the entire quantity in the bin. Note that this option does not apply to tally scanning. You can skip step 8.
8. F For serialized items, on the Enter Serial Number page, scan or enter the serial number in the field. If you enter the data, tap **Enter Serial Number** to proceed.

Repeat this step to enter all the serial numbers for the total quantity.

The Serial Numbers Entered field shows the number of serial numbers you have entered of the total number of expected serial numbers. For example, if you are transferring five serial numbers and you have entered two serial numbers, the field displays 2 of 5.

9. On the Enter To Bin page, enter or select values in the following fields:
   - **Inventory Status** - (Optional) If you use the Inventory Status feature, you can select a status for items associated with different statuses.

     > **Tip:** To display the Status column or change the status filter on the table, tap the table icon. From the Visible Columns list, tap **Status**. In the **Inventory Status** field, you can select a status filter. Then, tap **Done**.

   - **Scan/Enter To Bin** - Scan or enter the destination bin. If you enter the data, tap **Enter To Bin** to proceed.

     Alternatively, from the list of bins, tap the bin.

The confirmation page appears with the status of the bin transfer.

To view the bin transfer record, using the Administrator role, go to Transactions > Inventory > Bin Transfer > List. For more information, see the help topic Bin Transfers.

Inventory Transfers Between Warehouse Locations

Inventory transfers enable you to move inventory between two warehouse locations where you do not require shipping. You can also transfer inventory between your warehouse location and any of its sublocations.

For example, if you have a sublocation for damaged inventory, you can transfer damaged items to this sublocation, in particular, to prevent them from being committed to orders.

WMS Mobile Transfer Inventory

On your mobile device, when you transfer items between locations, NetSuite WMS creates an inventory transfer record to adjust the stock levels. When you transfer items between locations that use bins, it also adjusts the inventory for the source and destination bin locations by the appropriate quantity.

Note the following transfer guidelines for items and locations that use or do not use bins:

- To transfer from locations that use bins, you must also apply the Use Bins setting to the item. You can transfer these items to locations that use or do not use bins. See Transferring Items from Locations That Use Bins.
- You can transfer items from locations that do not use bins, regardless of the Use Bins setting for the items. You can transfer these items to locations that use or do not use bins. See Transferring Items from Locations That Do Not Use Bins.

For more information about the Use Bins setting on items or locations, see Creating Items for NetSuite WMS or Creating Warehouse Locations, respectively.

If you activate the Tally Scanning rule, you can scan item bar codes to enter each quantity that you want to transfer. You can tally scan a bar code for the item, item alias, or UPC. For numbered items, you can tally scan a bar code for a lot or serial number. If you also activate the Advanced Bar Code rule, you can tally scan an item bar code in the supported GS1 formats. You can scan a numbered item’s GS1 bar code that contains the lot or serial number. For more information, see System Rules for NetSuite WMS.

Transferring Items from Locations That Use Bins

Use the following instructions to transfer items from a warehouse location that uses bins. For guidelines on transferring items, see Inventory Transfers Between Warehouse Locations.

To transfer an item between warehouse locations:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Main Menu**.
2. On the Main Menu page, tap **Inventory**.
3. On the Inventory page, tap **Inventory Transfer**.

   The Select From Location page appears.
4. In the **Select From Location** field, select the location from which you want to transfer the items, and then tap **Enter From Location**.
5. On the Enter From Bin/Item page, do one of the following:
   - In the **Scan/Enter From Bin Or Item** field, scan or enter the number of the originating bin or the item name, number, or UPC. If you enter the data, tap **Enter From Bin/Item** to proceed.
   - To search for and select an item, tap **Find Item**.

   If you entered the item, proceed step 6. If you entered the bin, proceed step 7.
6. If you entered the item name or number, on the Enter From Bin page, do one of the following:
   - In the **Scan/Enter From Bin** field, scan or enter the number of the originating bin. If you enter the data, tap **Enter From Bin** to proceed.
   - To select from the list of bins, tap **Show all bins**, and then tap the bin number.
7. If you entered the bin number, on the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item name, number, or UPC. If you enter the data, tap **Enter Item** to proceed.
   - To select from the item list, tap the item name or number.
8. For lot items, on the Enter Lot page, do one of the following:
   - In the **Scan/Enter Lot** field, scan or enter the item name or number. If you enter the data, tap **Enter Lot** to proceed.
   - To select from the list of lot numbers, tap the lot number.
   - To transfer all the lots shown on the table, tap **Transfer All**. Proceed to step 11.
9. On the Enter Quantity page, depending on the features and rules you use, do the following:

   :

   Tip: If you entered a serialized item and want to transfer all expected quantities, tap **Transfer All**. Proceed to step 11.

   a. **Inventory Status** - (Optional) If you use the Inventory Status feature, you can select a status for bins that contain an item with different statuses.

      Tip: To display the Status column or change the status filter on the table, tap the table icon. From the Visible Columns list, tap **Status**. In the **Inventory Status** field, you can select a status filter. Then, tap **Done**.

   b. To enter the quantity, do one of the following:
      - **Enter Quantity** - Enter the quantity you want to transfer. Optionally, beside this field, you can select the unit for an item associated with multiple units.

Alternatively, for serialized items, to transfer the entire quantity for a serialized item, tap **Transfer All**. Proceed to step 11. Note that this option does not apply to tally scanning.

- **Tally Scan Item**, **Tally Scan Lot#/Item**, or **Tally Scan Serial** - Before you scan an item bar code, make sure you leave the Enter Quantity field blank and select the correct unit. You cannot change the unit after you scan the first item bar code. You can also verify that the correct inventory status is selected, as described in step 9.a. You can change the status after each scan.

  Repeat this step to scan each item. The value in the Enter Quantity and Remaining Quantity fields adjusts automatically. If you tally scan the entire available quantity, you are redirected to the Select To Location page. Proceed to step 11.

c. To save the quantity or proceed, tap one of the following buttons:

- **Enter Quantity** - Save the manually entered quantity.
- **Done** - Saves the partial tally scanned quantity.

10. For serialized items, on the Enter Serial Number page, scan or enter the serial number in the field. If you enter the data, tap **Enter Serial Number** to proceed.

    Repeat this step to enter all the serial numbers for the total quantity.

11. On the Select To Location page, in the **To Location** field, tap the location to which you want to transfer the item.

    If you selected a destination location that uses bins, proceed to step 12. If you selected one that does not use bins and you use the Inventory Status feature, proceed to step 13. Otherwise, a confirmation message appears.

12. If your destination location uses bins, on the Enter To Bin page, do one of the following:

    a. If you use the Inventory Status feature, in the **Inventory Status** field, select the status of the item.

    b. In the **Scan/Enter To Bin** field, scan or enter the bin number. If you enter the data, tap **Enter To Bin** to proceed.

    Alternatively, to select from the list of destination bins, tap the bin number.

13. If your destination location does not use bins and you use the Inventory Status feature, do the following:

    a. In the **Inventory Status** field, select the status of the item.

    b. Tap **Enter Status**.

> **Tip:** To view the stock locations associated with the item, tap the **Show Stock Locations** toggle.

A message appears to confirm the completed transfer.

To view the inventory transfer record, using the Administrator role, go to Transactions > Inventory > Transfer Inventory > List. For more information, see the help topic Basic Inventory Transfers.

Transferring Items from Locations That Do Not Use Bins

Use the following instructions to transfer items from a warehouse location that does not use bins. For guidelines on transferring items, see Inventory Transfers Between Warehouse Locations.

To transfer an item from locations that do not use bins:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Main Menu**.

2. On the Main Menu page, tap **Inventory**.
3. On the Inventory page, tap **Inventory Transfer**.

   The Select From Location page appears.
4. In the **Select From Location** field, select the location from which you want to transfer the items, and then tap Enter From Location.
5. On the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item name, number, or UPC. If you enter the data, tap **Enter Item** to proceed.
   - To search for and select an item, tap **Find Item**.
6. For lot items, on the Enter Lot page, do one of the following:
   - In the **Scan/Enter Lot** field, scan or enter the item name or number. If you enter the data, tap **Enter Lot** to proceed.
   - To select from the list of lot numbers, tap the lot number.
   - To transfer all the lots shown on the table, tap **Transfer All**. Proceed to step 9.
7. On the Enter Quantity page, depending on the features and rules you use, do the following:
   a. **Inventory Status** - (Optional) If you use the Inventory Status feature, you can select the status for an item that has different statuses.
   b. To enter the quantity, do one of the following:
      - **Enter Quantity** - Enter the quantity you want to transfer. Optionally, beside this field, you can select the unit for an item associated with multiple units.

        Alternatively, for serialized items, to transfer the entire quantity for a serialized item, tap **Transfer All**. Proceed to step 9. Note that this option does not apply to tally scanning.
      - **Tally Scan Item**, **Tally Scan Lot#/Item**, or **Tally Scan Serial** - Before you scan an item bar code, make sure you leave the Enter Quantity field blank and select the correct unit. You cannot change the unit after you scan the first item bar code. You can also verify that the correct inventory status is selected, as described in step 9.a. You can change the status after each scan.

        Repeat this step to scan each item. The value in the Enter Quantity and Remaining Quantity fields adjusts automatically. If you tally scan the entire available quantity, you are redirected to the Select To Location page. Proceed to step 11.

      To view the stock locations associated with the item, tap **Show Stock Locations**.
   c. To save the quantity or proceed, tap one of the following buttons:
      - **Enter Quantity** - Save the manually entered quantity.
      - **Done** - Saves the partial tally scanned quantity.
8. For serialized items, on the Enter Serial Numbers page, in the **Scan/Enter Serial Number** field, do one of the following:
   - Scan the serial number you want to transfer.
   - Enter the serial number you want to transfer, and then tap **Enter Serial Number**.

   Repeat this step to enter another serial number.
9. On the Select To Location page, in the **To Location** field, tap the warehouse location to which you want to transfer the item.

   If you selected a destination location that uses bins, proceed to step 10. If you selected one that does not use bins and you use the Inventory Status feature, proceed to step 11. Otherwise, a confirmation message appears.
10. If your destination location uses bins, do the following:

a. (Optional) In the **Inventory Status** field, select the status of an item that has different statuses.
b. In the **Scan/Enter To Bin** field, scan or enter the bin number. If you enter the data, tap **Enter To Bin** to proceed.

   Alternatively, from the bin list, you can tap the bin number.

11. If your destination location does not use bins and you use the Inventory Status feature, on the Enter Status page, do the following:
    a. In the **Inventory Status** field, select the status of item.
    b. Tap **Enter Status**.

> **Tip:** To view the stock locations associated with this item, tap **Show Stock Locations**.

A message appears to confirm the completed transfer.

To view the inventory transfer record, using the Administrator role, go to Transactions > Inventory > Transfer Inventory > List. For more information, see the help topic Basic Inventory Transfers.

Searching for Inventory

You can search for inventory within your warehouse by item name, number, or UPC. From the search results, you can view the quantity on hand.

If your warehouse location uses bins, you can also search by bin number to display the list of items within bins that match the keyword.

If you enable Mobile Printing, you can search for an item, and then print item and pallet labels. For numbered items, you can print labels with a lot or serial number. Only the default manual printing option is available for inventory searches. If you activate the Advanced Barcode system, you can print labels with the item bar code in GS1 format. For more information about Mobile Printing, see Label Printing and Reprinting.

To search for inventory:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Search Inventory**.
2. On the Search Inventory page, in the search field, enter the item name, number, or UPC.

   Alternatively, if your warehouse location uses bins, you can enter the bin number.

> **Tip:** Results appear after you type three characters.

3. If you use Mobile Printing and want to print item labels, do the following:
   a. From the results, tap the item.
   b. On the Item Information page, tap the more icon.
   c. From the submenu, tap **Print**. For lot or serialized items, tap **Print Lot/Serial #**.
   d. For lot or serial items, on the Select Lot/Serial # to Print page, tap the box next to the numbers you want to print. Then, tap **Print**.

      One lot or serial number appears for each item label.
   e. On the Print popup window, you can modify the printing options, and then tap **Print**.

Generating an Inventory Report

You can generate inventory reports to view item details as shown in the following columns:

- Item - Item name or number
- Item Description
- Location - Warehouse location
- Bin Location - If your warehouse location uses bins
- Units
- Quantity On Hand - Quantity currently stocked, including quantity committed to orders
- Available Quantity - Quantity currently stocked, not including quantity committed to orders
- Inventory Status - If you use the Inventory Status feature

For more information about inventory quantities, see the help topic Assessing Stock Levels.

You can export generated inventory reports into an Excel file.

To generate an inventory report:

1. Using the Warehouse role, go to Reports > Inventory/Items > Inventory Report.
2. On the Inventory Report page, in one or more of the following fields, select the criteria for the items you want to include in the report:
   - **Item** - Select an item name or number.
   - **Location** - Select a warehouse location.
   - **Bin Location** - If your warehouse location uses bins, select a bin number.
   - **Inventory Status** - If you use the Inventory Status feature, select a status.
3. Click **Display**.

   The Inventory Report table appears with list and details of items that match your criteria.
4. (Optional) To export the inventory report, click **Export to Excel File**, and then open or save the file in your local computer.

Creating Inventory

Create inventory to add item quantities to your warehouse's inventory without a transaction such as a purchase order, transfer order, or customer return. When you create inventory, NetSuite WMS generates an inventory adjustment record to increment the stock level for the inventory item.

Creating inventory using an inventory adjustment may affect item costing. For more information, see the help topic Inventory Adjustments.

> **Important:** Use caution when you create inventory. Ensure that you add items to the appropriate bins. If you add an item to a bin location you have not defined in your one of your warehouse's picking strategies, when you pick the item, the system might not suggest the bin to which you added the item. For information about pick strategies, see Defining Pick Strategies.

WMS Mobile Create Inventory

To create inventory:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Main Menu**.
2. On the Main Menu page, tap **Inventory**.
3. On the Inventory page, tap **Create Inventory**.
4. On the Create Inventory page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item name, number, or UPC. If you enter the data, tap **Enter Item** to proceed.
   - To search for the item, tap **Find Item**.
5. For lot-numbered items, on the Enter Lot page, do the following:
   a. In the **Scan/Enter Lot** field, scan or enter the lot number.
   b. (Optional) In the **Expiry Date** field, enter the expiry date of the lot item.
   c. Tap **Enter Lot**.
6. On the Enter Quantity page, select values in the following fields:
   a. (Optional) If you use the Inventory Status feature, in the **Inventory Status** field, select the status of the item.
   b. In the **Enter Quantity** field, enter the quantity of the item you want to add to your inventory.
   c. Tap **Enter Quantity**.
7. For serialized items, on the Enter Serial Number page, in the Scan/Enter Serial Number field, scan or enter the serial number. If you enter the data, tap **Enter Serial Number** to proceed.

   Repeat this step until you have entered all the serial numbers.
8. For warehouse locations that use bins, on the Enter Bin page, in the **Scan/Enter Bin** field, scan or enter number of the destination bin for the item. If you enter the data, tap **Enter Bin** to proceed.

   Tip: From the list of bins, you can copy the bin number.

A confirmation message appears.

To view the inventory adjustment record, using the Administrator role, go to Transactions > Inventory > Adjust Inventory > List.

Inventory Counts

If you use the Inventory Count feature, you can create regular, periodic inventory counts of on-hand item quantities to maintain inventory accuracy. For more information, see the help topic Inventory Count.

Aside from manual and calculated inventory counts, Warehouse Management also enables you to create cycle count plans. You can generate inventory counts from a plan and process them on your mobile device. For warehouses with bins, you can count items in bins, except those in WIP bin types.

To create inventory counts, see the following topics:

- Creating Manual Inventory Counts
- Creating Calculated Inventory Counts
- Creating Cycle Count Plans
- Generating and Releasing Inventory Counts

To process inventory counts, see the following topics:

- Starting Inventory Counts

- Performing Inventory Counts
- Completing Inventory Counts
- Approving or Rejecting Inventory Counts v

Creating Manual Inventory Counts

Create manual inventory counts to manually choose the items you want to count and set the date of the count.

For warehouse locations that use bins, you can create inventory counts for each unique item and bin combination. You can count an item in different bins or different items in the same bin. For more information about bins, see Creating Bin Locations or Carts.

To create a manual inventory count:

1. Using the Warehouse role, go to Inventory > Cycle Counting > Enter Cycle Count.
2. On the Inventory Count page, enter or select values in the following fields:
   - In the **Subsidiary** field, select the subsidiary to which the warehouse location belongs.
   - In the **Location** field, select the warehouse location.
   - In the **Date** field, enter the date you want to set for the inventory count.
   - In the **Account** field, select the account to which you want to post variances, typically, an expense account.

     By default, the account you set in the Default Inventory Count Account field on the Accounting Preferences page appears in this field. See the help topic Setting Up Inventory Count.
3. On the **Items** subtab, do the following:
   a. In the **Item** column, select the item you want to count.
   b. If you use bins for the warehouse location, in the **Bin** column, select the bin that contains the item you want to count.
   c. Click **Add**.

   Repeat steps a – c to add another item.
4. Click **Save**.

   NetSuite WMS sets the new inventory count to Open status.
5. If you want to start the new count, click **Start Count**.

   For more information about initiating counts, see Starting Inventory Counts.

When you want to process the inventory count, you can edit the started inventory count record to enter the count details. See the help topic Working with an Inventory Count.

Creating Calculated Inventory Counts

Create inventory counts based on calculations performed by NetSuite WMS to determine items due for an inventory count. These calculations depend on values in the inventory count fields that you set on an item record. For more information about these fields, see Creating Items for NetSuite WMS.

To create a calculated inventory count:

1. Using the Warehouse role, go to Inventory > Cycle Counting > Create Cycle Count.
2. On the Create Inventory Count page, select values in the following fields:

- **Subsidiary** - Select the subsidiary to which the warehouse location belongs.
- **Location** - Select the warehouse location to which the item belongs.

  The item sublist displays valid items due for an inventory count from the warehouse location. Items associated with open inventory counts do not appear in the list.
- **Account** - Select the account to which you want to post variances, typically, an expense account.

  By default, the account you set in the Default Inventory Count Account field on the Accounting Preferences page appears in this field. See the help topic Setting Up Inventory Count.

3. (Optional) In one or more of the following fields, enter or select your criteria to search for items you want to include in the count:
   - **Count Start Date** - Enter or select the start date of the count for an item.

     This filter shows only items that require a count on or after the start date.
   - **Count End Date** - Enter or select the end date of the count for an item.

     This filter shows only items that require a count on or before the end date.
   - **Classification** - Select the classification for an item.

   The item sublist automatically adds or removes items based on your criteria.
4. (Optional) If you use bins for the warehouse location, check the box for the setting you want to apply to your inventory count:
   - **Count Bin Rows With Zero Quantity** - Includes items with an on-hand count of zero.
   - **Sort Rows by Bin** - Sorts items by bin number, instead of the default sorting by item name or number. Apply this setting to count all items in a specific area of a warehouse.
5. In the item sublist, in the **Select** column, check the box next to each item you want to count.
6. Click **Submit**.

NetSuite WMS sets the new inventory count to Open status. For warehouse locations that use bins, the Bin column appears next to the Item column on the Item subtab. It displays bins that contain the items you want to count.

To initiate the inventory count, see Starting Inventory Counts.

Creating Cycle Count Plans

Instead of creating inventory counts directly, you can create cycle count plans that serve as templates for generating inventory counts. Plans provide more bin and item filters than those on manual or calculated inventory counts.

Note the following guidelines for cycle count plans:

- You can create multiple cycle count plans. When you generate an inventory count, the dropdown list of plans can display only up to 1000 plans at a time.
- Your setting for the following preferences apply to cycle count plans: Make Department Mandatory and Make Classes Mandatory.
- You can assign a default employee to a plan, which you can change when you generate an inventory count. On a mobile device, employees can process only the counts assigned to them and unassigned counts.

To create a cycle count plan:

1. Using the WMS Warehouse Manager role, go to WMS Inventory > Cycle Count > Create Cycle Count Plans > New.

The WMS Cycle Count Plans page appears.

2. In the Main section, enter values in the following fields:
   - **Name** - Enter a unique name for the cycle count plan.
   - **Subsidiary** - Select the subsidiary of the location you want to assign to the plan.
   - **Location** - Select a location or warehouse.
   - **Account** – Select the account to which you want to post variances, typically, an expense account.

     By default, the account you set in the Default Inventory Count Account field on the Accounting Preferences page appears in this field. See the help topic Setting Up Inventory Count.
   - Optionally, you can set the following fields to provide more details about the cycle count plan: **Department**, **Class**, **Memo**, **Assigned To**.
3. Optionally, on the Items section, you can do the following:
   - You can define the item filters in the following fields: **Item Classification**, **Item Family**, or **Item Group**.
   - In the **Item** field, you can select the items you want to include in the counts generated for this plan.
   - To filter items based on the next count date, check the **Use Item Frequency** box.

     When you generate the count, you can specify either or both the count start and count end dates. Items with next count dates that meet your specified criteria appear in your search results. Make sure you set the next count date on their corresponding item records.

     If you clear this box and generate the count, items appear in your search results regardless of their next count date.

   For more information about these item fields, see Creating Items for NetSuite WMS.
4. Optionally, for locations with bins, in the Bins section, you can do the following:
   - You can define the bin filters in the following fields: **Zones** or **Aisle**.
   - In the **Bins** field, you can select the bins that contain the items you want to count.
   - To include items with an on-hand count of zero, check the **Count Bin Rows With Zero Quantity** box.
   - To sort items by bin number, instead of the default sorting by item name or number, check the **Sort Rows by Bin** box.

     You can apply this setting to count all the items in a specific area of your warehouse.
5. Click **Save**.

To generate inventory counts from this plan, see Generating and Releasing Inventory Counts.

Generating and Releasing Inventory Counts

From a cycle count plan, you can generate one inventory count at a time. When you generate a count, you can apply the count date filters and assign it to an employee. From the list of items returned by the plan, you can select the items you want to count. For more information about plans, see Creating Cycle Count Plans.

If you want to include items based on their next count date, make sure you set the inventory count fields on the item records. For more information, see Creating Cycle Count Plans.

Right after you generate and release a count, you can start it and then process it from a mobile device.

To generate and release a cycle count plan:

1. Using the WMS Warehouse Manager role, go to WMS Inventory > Cycle Count > Generate Cycle Count from Plan.
2. On the Generate Cycle Count from Plan page, set the following fields:
   - **Plan Number** - Select the cycle count plan.

     This field displays a maximum of 1000 plans at a time. NetSuite WMS sorts the plans alphabetically, by name, and then includes the first 1000 plans in the selection list.
   - **Count Start Date** - (Optional) Enter the date when you want to start the inventory count.
   - **Count End Date** - (Optional) Enter the date when you want to complete the inventory count.

   If you set either or both of the date fields, you filter the items based on their next count date.
3. Click **Display**.

   The Items sublist appears on the page with the list of items to count.

   > **Note:** If items do not appear in the list, you can review your cycle count plan filters. On item records, you can verify that there is on-hand quantity within the location defined in the plan. You can also review the bins and other item settings that correspond with your cycle plan filters.
4. In the **Select** column, check the box next to the bins and items that you want to include in the count.

   > **Note:** If you use bins for your items, the Bin column appears beside the Item column. You can choose items within the same bin or the same item in different bins.
5. (Optional) In the **Assigned To** field, select the name of the user you want to assign to the count.

   When you assign a plan to an employee, the employee's name appears in this field by default.
6. Click **Generate & Release**.

   The confirmation page appears.
7. Optionally, to start the count immediately, click **Start Count**.

   If you want to start a count at a later time, you can access it by going to WMS Inventory > Cycle Count > Enter Cycle Count > List. You can edit an open inventory count and start it. You can process started inventory counts on your mobile device. For instructions, see Starting Inventory Counts or Performing Inventory Counts.

Starting Inventory Counts

You can start inventory counts that have the Open status. NetSuite WMS takes a snapshot of the on-hand count of the items for counting by bin and serial number. It records the data on the inventory count.

Using the NetSuite WMS user interface, you can process started manual or calculated inventory counts. Using a mobile device, you can perform started inventory counts generated from cycle count plans. When you count an item, you can edit the quantity but you cannot add or delete items from count tasks.

To start an inventory count:

1. Using the WMS Warehouse Manager role, go to WMS Inventory > Cycle Count > Enter Cycle Count > List.
2. From the Inventory Counts list, click **View** next to the count you want to start.

3. On the Inventory Count page, click **Start Count**.

You can process inventory counts that have the Started status.

To process manual and calculated inventory counts, see the help topic Working with an Inventory Count. To process counts generated from cycle count plans, see Performing Inventory Counts.

Performing Inventory Counts

On your mobile device, you can process inventory counts generated from cycle count plans. You can access inventory counts that have the Started status. For more information, see Creating Cycle Count Plans.

WMS Mobile Count Inventory

If you activate the Tally Scanning rule, you can scan item bar codes to enter each quantity that you want to count. You can tally scan a bar code for the item, item alias, or UPC. For numbered items, you can tally scan a bar code for a lot or serial number. If you also activate the Advanced Bar Code rule, you can tally scan an item bar code in the supported GS1 formats. You can scan a numbered item's GS1 bar code that contains the lot or serial number. For more information, see System Rules for NetSuite WMS.

To perform an inventory count:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Main Menu**.
2. On the Main Menu page, tap **Inventory**.
3. On the Inventory page, tap **Cycle Count**.
4. On the Select Plan page, do one of the following:
   - In the **Scan/Enter Plan #** field, scan or enter the inventory count number. If you enter the data, tap **Enter Plan #** to proceed.

     On inventory count records, this number appears in the Ref. No. field.

     If you cannot find the inventory count, verify that the plan has been assigned to you. See Generating and Releasing Inventory Counts.
   - From the Cycle Count Plans list, tap the number.
   - To update a processed count, tap the **Show Completed** toggle. Then from the list, tap the number.
5. On the Select Task page, from the Cycle Count Tasks list, tap the bin number or item associated with the task you want to process.

   For completed counts, you can view the result of the latest count in the Original Quantity column.
6. For locations with bins, on the Enter Bin page, scan or enter the bin in the field. If you enter the data, tap **Enter Bin** to proceed.

   Alternatively, in the **Expected Bin** field, tap the bin number.
7. On the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item you want to count. If you enter the data, tap **Enter Item** to proceed.

     You can scan the item name, number, alias, or UPC.
   - From the Items to count list, tap the item.

     If you want to view the completed items associated with the inventory count, tap the toggle.
   - If the bin does not contain quantities of the item, tap **Zero Quantity**.

If you have other items to count from a different bin, the Select Task page appears. Repeat from step 6. Otherwise, the Count Plan Complete page appears with the count details. Proceed to step 11.

8. For lot items, on the Enter Lot page, scan or enter the lot number in the field. If you enter the data, tap **Enter Lot** to proceed.
9. On the Enter Quantity page, you can enter the quantity depending on the item type and features you use:
    a. To enter the quantity, do one of the following:
        - **Enter Quantity** - Enter the counted quantity for the item. For numbered items, enter the total counted quantity for all lot or serial numbers. Optionally, beside the field, you can select the unit for an item associated with multiple units.

          Tip: If you use the Inventory Status feature and the item has different statuses, enter the total counted quantity for all statuses. Then, tap **Enter Quantity**. You are redirected to this page and you can now enter the quantity for each status.

          Optionally, if the item is associated with multiple units, you can select a unit. The Quantity Remaining field displays the adjusted value in the item's base unit.
        - **Tally Scan Item** - Before you scan an item bar code, make sure you leave the Enter Quantity field blank and select the correct unit. You cannot change the unit after you scan the first item bar code. You can also verify that the correct inventory status is selected, as described in step 9.b.

    b. **Inventory Status** - (Optional) For non-numbered items, select a status for the counted items.
    c. To save the quantity or proceed, tap one of the following buttons:
        - **Enter Quantity** - Saves the counted quantity, the total counted quantity for a numbered item, or the total counted quantity for an item with different statuses.

          For regular items associated with different statuses, you are redirected to this page. Repeat the steps to enter the quantity for each status.
        - **Enter Lot** - For lot items, tap this button to enter another lot number. Repeat from step 8.
        - **Done** – Saves the tally scanned quantity and exits this page.
        - **Bin Empty** or **No Stock** - If you have no available or remaining items to count, tap either of these buttons.
10. For serialized items, on the Enter Serial Numbers page, enter or select values in the following fields:
    a. **Inventory Status** - (Optional) For item with different statuses, you can select a status.
    b. **Scan/Enter Serial Number** - Scan or enter the serial number.
    c. Tap **Enter Serial Number**.

    Repeat these steps for each serial number.
11. Depending on the remaining tasks in the inventory count, you are redirected to one of the following pages:
    - If you have other lot items to count or other items from a different bin, the Select Task page appears. Repeat from step 8.

      If the other items to count belong to the same bin, the Enter Item page appears. Repeat from step 7.
    - If you have completely processed the count, the Count Plan Complete page appears. For warehouses with no bins, the Task Count Completed page appears.

You can view the count details, and then process another count, select another plan, or update a processed count.

To complete your processed counts, see Completing Inventory Counts.

Completing Inventory Counts

Depending on the result of the count, NetSuite may create either or both of the following inventory adjustment transactions for the count:

- One positive inventory adjustment (more on hand)
- One negative adjustment (less on hand)

When you return to the item record of an item for which there is a completed count, the Inventory subtab shows the following:

- **Last Count Date** – Date when the last count occurred
- **Next Count Date** – System-calculated next date to enter an item count
- **Count Interval** – Preset count interval

To complete an inventory count:

1. Log in to your NetSuite WMS account using the Warehouse role.
2. Go to Inventory > Cycle Counting > Enter Cycle Count > List.
3. Click **View** next to the count you want to complete.
4. Click **Complete Count**.

> **Note:** Until you complete an inventory count, you cannot release or start a new inventory count for that item.

Approving or Rejecting Inventory Counts

For counts in Complete/Pending Approval status, a supervisor can approve or reject them using the NetSuite WMS user interface.

On the Inventory Count record, the Items subtab shows the Count Quantity, Adjusted Quantity, and Variance Detail for each item in the inventory count. The WMS subtab shows details about the count for each, including the time and date and the user who performed the count.

To approve or reject an inventory count:

1. Log in to your NetSuite WMS account using the Warehouse role.
2. Go to Inventory > Cycle Counting > Enter Cycle Count > List.
3. Click **View** next to the count you want to open.
4. Do one of the following:
   - Click **Reject** – The count status returns to Started and the warehouse operator must perform another count.
   - Click **Approve** – The count is final and the status becomes Approved.

     After you approve a count, the Inventory Count record shows a History subtab. You can view the Inventory Adjustments sublist, which shows all adjustments related to this count.

Work Order Picking

Assembly work orders track the production of assembly items needed for stock or to fill orders. Work orders track the quantities of assemblies that need to be built and the quantities of required components, or member items.

For example, if you stock and sell the Deluxe Assembled Widget, you can enter a work order to do the following:

- Track the quantity of widgets that need to be assembled.
- Commit component items available in stock to the work order.
- Track when the widgets are assembled and the work order is completed, so the widgets can be stocked or sold.

To assemble inventory, you complete the following tasks:

- Pick the component items for the assembly item. See Picking Component Items for Work Orders.
- Build the assembly item. See Building Assembly Items for a Work Order.

For more information, see the help topic Assembly Work Orders.

Picking Component Items for Work Orders

Picking Component Items for Work Orders

Use your mobile device to pick component items for released work orders. If you use the Manufacturing Work in Process (WIP) feature, you can also pick component items for WIP-enabled work orders. However, you cannot use the mobile device to build assembly items for WIP-enabled work orders.

> **Note:** If you use the Manufacturing Routing and Work Center feature, you cannot use the mobile device to pick component items or build assembly items for work orders associated with routings.

If you use Manufacturing Mobile with Warehouse Management, you can activate the **Allow over-picking for work orders** rule to enable excess quantity when you pick component items. You can also stage the picked items in WIP bins for Manufacturing Mobile. For more information, see the help topic Activating the Allow Over-picking for Work Orders System Rule or Creating a WIP Bin for Manufacturing Mobile.

To pick component items for a work order:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Main Menu**.
2. On the Main Menu page, tap **Work Orders**.
3. On the Work Orders page, tap **Picking**.
4. On the Select Work Order page, do one of the following:
   - In the **Scan/Enter Work Order #** field, scan or enter the work order number you want to process. If you enter the data, tap **Enter Work Order #** to proceed.
   - To select the list of work orders, tap the work order number.
5. On the Select Pick Task page, from the Pick Tasks list, tap the item associated with the pick task you want to process.

   > **Note:** If your warehouse does not use bins and you entered a partial quantity for an item, you can stage any picked items by tapping **Go to Staging**. Proceed to step 10.
6. For warehouse locations that use bins, on the Enter Bin page, do one of the following:

- In the **Scan/Enter Bin** field, scan or enter the bin number. If you enter the data, tap **Enter Bin** to proceed.
- To select the recommended bin, in the **Recommended Bin** field, tap the bin number.
- To select from the list of bins, tap the **Show all bins** toggle, and then tap the bin number.

7. On the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item, UPC, or item alias you want to pick. If you enter the data, tap **Enter Item** to proceed.

     For more information about aliases, see Creating Item Aliases.
   - In the **Item To Pick** field, tap the item name or number.
8. On the Enter Quantity page, do the following:

   > **Note:** To process insufficient or partially picked items, you can do the following:
   >
   > - If your warehouse uses bins and the bin has no items, tap **Bin Empty**. You can process another pick task, or select the same one and pick from another bin. If your warehouse does not use bins, tap **No Stock**.
   > - When you enter a partial quantity for an item, you are redirected to this page to enter the remaining quantity. For lot items, you can also select another lot number.

   a. In the **Enter Quantity** field, enter the number of items you want to pick.
   b. If you use the Inventory Status feature, in the **Inventory Status** field, select the status of the item.
   c. For lot-numbered items, in the **Scan/Enter Lot** field, scan or enter the lot number. If you enter data, tap **Enter Quantity** to proceed.

      Alternatively, to select from the Available Lots list, tap the lot number. If the work order contains the lot numbers, the list displays only those numbers.

   > **Tip:** For warehouse locations that do not use bins, if you want to view stock locations associated with the item, tap the **Show Stock Locations** toggle.

9. For serialized items, on the Enter Serial Number page, in the **Scan/Enter Serial Number** field, scan or enter the serial number. If you enter the data, tap **Enter Serial Number** to proceed.

   > **Tip:** To view the list of serial numbers, tap the **Show possible serial numbers** toggle. If the work order contains the serial numbers, the list displays only those numbers.

   Repeat this step to add more serial numbers. If you entered a partial quantity, you are redirected to the Enter Quantity page. See step 8.

   After you have fully picked the item, a confirmation message appears. You can do the following:
   - If you have another pick task that you want to process, tap **Next Pick Task**. Return to step 5.
   - For warehouses that use bins, you can process all the pick tasks first, and then stage them using the same bin. You can also stage one or more items in a separate bin. To stage items, proceed to step 10.
10. If your warehouse location uses bins and you want to stage the picked items, tap **Go to Staging**, and then on the Enter Staging Bin page, do one of the following:
    - In the **Scan/Enter Staging Bin** field, scan or enter the number of the staging bin. If you enter the data, tap **Enter Staging Bin** to proceed.
    - To select from the list of bins, tap the **Show all bins** toggle, and then tap the bin number.

A message appears to confirm that you have staged the items successfully.

On the associated work order records, you can view the open tasks by going to Inventory > Work Orders > Work Orders > List. NetSuite WMS creates open tasks even for partially picked component items. It creates separate open tasks for any remaining items that you pick at a later time. For more information about work orders, see the help topic Assembly Work Orders.

On item records, you can view the adjusted the stock levels for each component item's inventory detail. The component items' stock level decreases in the source storage bin and increases in the destination work-in-progress (WIP) bin location, in which you can build the assembly item.

To close a work order, you must complete a build that assembles the component items. To build work orders, see Building Assembly Items for a Work Order.

Building Assembly Items for a Work Order

To close a work order, you must complete a build that assembles the component items. Complete the steps below to process work orders for assembly builds on your mobile device.

> **Note:** You must set up a WIP bin location to build assembly items. For more information, see Creating Bin Locations or Carts.

To build the assembly item for a work order:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Main Menu**.
2. On the Main Menu page, tap **Work Orders**.
3. On the Work Orders page, tap **Build Assembly**.
4. On the Select Work Order page, do one of the following:
    a. In the **Scan/Enter Work Order #** field, scan or enter the work order number. If you enter the data, tap **Enter Work Order #**.
    b. To select from the list of work orders, tap the work order number.
5. On the Enter Quantity page, do the following:
    a. In the **Enter Quantity** field, enter the number of items you want to build.
    b. If you use the Inventory Status feature, in the **Inventory Status** field, select the status of the item.
    c. (Optional) If you have set up mobile printing and want to manually print labels, tap **Print**.

    > **Tip:** You can print labels with lot or serial numbers on pages on which you can enter them. See step 6 or step 8, respectively.

    For more information about mobile printing, see Manually Printing Labels from Your Mobile Device.

    d. Tap **Enter Quantity**.
6. If you want to build a lot assembly item, on the Enter Lot page, do the following:
    a. In the **Scan/Enter Lot** field, scan or enter the lot number of the assembly item.
    b. (Optional) In the **Expiry Date** field, enter the expiry date of the lot assembly item.
    c. If you want to manually print a label with the lot number, tap **Print**. See Manually Printing Labels from Your Mobile Device.

d. Tap **Enter Lot**.

7. For warehouse locations that use bins, on the Enter Bin page, do one of the following:
   - In the **Scan/Enter Bin** field, scan or enter the bin number. If you enter the data, tap **Enter Bin** to proceed.
   - To select from the list of bins, tap the **Show all bins** toggle, and then tap the bin number.
8. If you want to build a serialized assembly item, on the Enter Serial Number page, in the **Scan/ Enter Serial Number** field, scan or enter the serial number. If you enter the data, tap **Enter Serial Number** to proceed.

   Repeat this step to enter more serial numbers.

   > **Tip:** If you want to manually print a label with the serial number, enter the serial number, and then tap **Print**. See Manually Printing Labels from Your Mobile Device.

9. If your warehouse location uses bins and you want to stage inventory items, tap **Go to Staging**, and then on the Enter Staging Bin page, do one of the following:
   - In the **Scan/Enter Staging Bin** field, scan or enter the number of the staging bin. If you enter the data, tap **Enter Staging Bin** to proceed.
   - To select from the list of bins, tap the **Show all bins** toggle, and then tap the bin number.

   A message appears to confirm that you have staged the items successfully.

NetSuite records a completed assembly build on the work order and assigns the work order to Built status. It increases the assembly item's stock level in the storage bin location where you put it away. It also decreases the component items' individual stock levels in the work-in-progress (WIP) bin from which you built the assembly.

Replenishment

For warehouse locations that use bins, you can replenish inventory at the item level or at the bin level. If you want to drive replenishment based on an item's stocked quantity, you can do so manually using a replenishment report. If you want to drive replenishment based on a primary bin's stocked quantity, you can do so using a workflow generated from a replenishment plan.

Replenishing Inventory Using a Replenishment Report

You can manually determine the required replenishment for an item using a replenishment report. First, set replenishment quantities on your item records and then access the replenishment report showing the current inventory for items in your warehouse. The report shows a list of items and their quantities per bin location, including the replenishment quantities set on their item records.

Using the Warehouse role, you can access a replenishment report by going to Reports > Inventory/Items > WMS Replen Items Details.

For more information about setting replenishment quantities on items records, see Creating Items for NetSuite WMS.

Replenishing Inventory Using a Replenishment Plan

NetSuite WMS supports inventory replenishment for items' primary bins. First, set replenishment quantities on your primary bin records and then generate replenishment plans. When you assign the resulting replenishment tasks, the assigned users complete and track the tasks using mobile devices.

The following replenishment fields appear on the bin record and are used to calculate when replenishment tasks are required to restock items in the bin:

- **WMS Replen Min Qty** – the minimum quantity of an item a bin should contain before it should be replenished.
- **WMS Replen Max Qty** - the maximum quantity of an item a bin should contain after you replenish it.
- **WMS Replen Qty** - the usual quantity of an item to be used for replenishment tasks.
- **WMS Replen Round Qty** - the multiple to which the required replenishment quantity should be rounded down to determine the required number of replenishment tasks.

When an item's on-hand quantity in a bin is less than the quantity set in the WMS Replen Min Qty field, NetSuite WMS generates replenishment tasks. NetSuite WMS generates the required replenishment tasks based on the quantities set on the bin record. For example, consider a bin record with an on-hand quantity of 15 and the following replenishment quantities:

- WMS Replen Min Qty = 20
- WMS Replen Max Qty = 180
- WMS Replen Qty = 50
- WMS Replen Round Qty = 10

NetSuite WMS calculates a required quantity of 165 as the difference between the maximum quantity and the on-hand quantity. Because the round quantity is set to a multiple of 10, the system rounds the required quantity down to 160. The system creates a replenishment task for each multiple of the replenishment quantity and for the round quantity to equal the required quantity. The following are the four created tasks with their associated quantities:

- Task 1 = 50
- Task 2 = 50
- Task 3 = 50
- Task 4 = 10

For more information about setting replenishment quantities on your primary bin records, see Creating Bin Locations or Carts.

Generating Replenishment Plans

Before you can replenish a primary bin location, you must first generate a replenishment plan. When you generate a replenishment plan, you create replenishment tasks to determine how many items should be moved from the bulk storage bin location to the primary bin location. Use the Generate Replenishment page to search for bins that require replenishment according the logic described in Replenishing Inventory Using a Replenishment Plan. Based on the search criteria you define on this page, NetSuite WMS generates the required tasks and you can optionally assign them to specified users. If a replenishment task is assigned to a user, that task appears on that user's mobile device only.

To generate a replenishment plan:

1. Log in to your NetSuite WMS account using the Warehouse role.
2. Go to Inventory > Replenishment > Generate Replenishment.
3. In the **Location** field, select your warehouse location.
4. If necessary, make selections in one or more of the Item Classification, Item Family, Item Group, and Item fields, depending on the items you want to appear in your search results.

5. Click **Display**.
6. Check the box in the **Confirm** column next to each item you want to replenish.
7. If you want to assign the selected replenishment tasks to a specific user, select their name in the **Assigned To** field.

   If you assign a replenishment task to a user, that task appears on that user's mobile device only.
8. Click **Generate & Release**.

Replenishing Primary Bin Locations

To replenish bins, you access the replenishment task information on the Inventory menu on mobile devices. After you complete replenishment tasks, you must confirm that they have been completed. When you use a mobile device to confirm replenishment tasks, you confirm the tasks in real time as you complete the replenishment tasks in the bin locations.

To replenish a primary bin location:

1. On your mobile device, tap the menu icon ☰ at the top-left corner of the screen.
2. Tap **Main Menu**.
3. On the Main Menu page, tap **Inventory**.
4. On the Inventory page, tap **Replenishment**.
5. On the Select Replenishment Tasks page, tap a task hyperlink.
6. On the Enter Bin page, in the **Scan/Enter Bin** field, scan or enter the source bin location for the first item you are replenishing and tap **Enter Bin**.

   You can also tap the bin hyperlink in the **Recommended Bin** field.
7. On the Enter Item page, in the **Scan/Enter Bin** field, scan or enter the first item you are replenishing and tap **Enter Item**.

   You can also tap the item hyperlink in the **Item to Replenish** field.
8. On the Enter Quantity page, in the **Enter Quantity** field, enter the quantity of the item you are moving from the source bin location.

   The **Quantity to Move** field displays the recommended quantity.
9. If necessary, tap **Enter Quantity**.
10. If you are replenishing a lot numbered item, on the Enter Lot page, scan or enter the lot number and enter quantity of the item you counted in the lot. Tap **Enter Quantity**. Repeat this step for lot number you are replenishing.
11. If you are replenishing a serialized item, on the Enter Serial Numbers page, scan or enter the serial number for the unit of the item you are replenishing.
12. If necessary, tap **Enter Serial Number**. Repeat this step for each unit of the serialized item you are replenishing.

    The Serial Numbers Entered field shows the number of serial numbers you have entered of the total number of expected serial numbers. For example, if you are counting five serial numbers and you have entered two serial numbers, the field displays 2 of 5.
13. On the Enter To Bin page, do one of the following:
    - In the **Scan/Enter To Bin** field, scan or enter the destination bin location to which you are transferring the item. Tap **Enter To Bin**.
    - Tap the hyperlink for the destination bin.

14. Repeat the necessary steps to replenish the remaining items in the replenishment plan.

Changing the Inventory Status of Items

If you use the Inventory Status feature, you can change the status of items using your mobile device. For warehouses with bins, you can change the status of items in specific bins.

Make sure that you have configured the inventory statuses that you want to assign to your items. See the help topic Creating Inventory Status Records.

To change the inventory status of an item:

1. On the Main Menu page, tap **Inventory**.
2. On the Inventory page, tap **Change Inventory Status**.
3. On the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item name, UPC, or item alias. If you enter the data, tap **Enter Item** to proceed.
   - To search for the item you want to update, tap **Find Item**.
4. For warehouses with bins, on the Enter Bin page, do one of the following:
   - In the **Scan/Enter Bin** field, scan or enter the bin that contains the item. If you enter the data, tap **Enter Bin** to proceed.
   - From the list of bins, tap the bin you want to select.
5. For lot items, on the Enter Lot page, do one of the following:
   - In the **Scan/Enter Lot** field, scan or enter the lot number. If you enter the data, tap **Enter Lot** to proceed.
   - From the list of lot numbers, tap the number you want to select.
6. On the Enter Quantity page, do the following:
   a. In the **Revised Status** field, select the new inventory status of the item.
   b. In the **Enter Quantity** field, enter the quantity of the item to which you want to assign the new inventory status.
   c. (Optional) If the item is associated with multiple units, in the field beside the Enter Quantity field, you can select a unit.
   d. Tap **Enter Quantity**.
7. For serialized items, on the Enter Serial Numbers page, in the **Scan/Enter Serial Number** field, scan or enter the serial number of the item. If you enter the data, tap **Enter Serial Number** to proceed.

   Repeat this step to enter all the serial numbers for the total quantity of items you want to update.

On item records, you can view the inventory status of the item.

Outbound Processing

Outbound processing is the preparation and shipment of items out of the warehouse. It includes the picking, packing, and shipping of items to fulfill orders. You can process orders for both warehouses that use bins and do not use bins.

Depending on your shipping processes, the tasks you complete to fulfill orders might vary. The following topics describe the outbound processes you can complete using NetSuite WMS:

- Fulfilling Released Orders
- Releasing Orders to the Warehouse
- Picking Orders
- Packing Orders
- Shipping Orders

Fulfilling Released Orders

You might ship items out of your warehouse for the following reasons:

- You are sending items customers have ordered.
- You are sending items to transfer them to other warehouse locations.

You ship sales order items to a customer to complete a sale. You ship transfer order items to your company's various warehouse locations.

Before you can ship items out of your warehouse, you must create sales orders or transfer orders. These transactions track the sale, transfer, and shipment of items out of your warehouse. Depending on your business process, when you submit or approve an order, the system commits items to that order.

Using NetSuite WMS, you can include committed items in wave transactions and release them to the warehouse. Released orders can be processed by pickers for fulfillment on their mobile device. For more information, see Releasing Orders to the Warehouse or Item Fulfillments of Released Orders.

Order fulfillment involves shipping the items to fill an open order. When you fulfill an order, you complete separate tasks to pick the items from inventory, pack the items to prepare them for shipping, and then send them out to be shipped to their destination.

NetSuite WMS recognizes and lets you process only transactions that meet the following conditions:

- All orders must be approved.
- The warehouse location for an order must be the same as the warehouse location you select on a mobile device.
- Sales orders and transfer orders must have the Pending Fulfillment or Partially Fulfilled/Pending Billing status.
- To view the conditions related to orders for release through wave transactions, see Releasing Orders to the Warehouse.

Item Fulfillments of Released Orders

Item fulfillment records track orders through each step of the fulfillment process. They update the quantities for items you commit to orders and ship out of the warehouse. Possible statuses for an item fulfillment are Picked and Shipped. Item fulfillment records link to their associated sales orders, transfer orders, and inventory items as related records.

NetSuite WMS generates fulfillment records from completed pick tasks. It follows your preference to generate fulfillments per order or per order line. By default, it marks the generated fulfillments as Picked. You can change this default status to automatically mark fulfillments as Packed by inactivating the Manually pack orders? system rule. For more information about the preference and rule, see Setting Warehouse Management Preferences or System Rules for NetSuite WMS.

For warehouse locations that use bins, released orders are fulfilled from outbound staging bins. On fulfillment records, the inventory detail displays the quantity transferred from the picking bin to the staging bin. For more information about picking and staging released orders, see Picking Orders.

See how the following features affect fulfillment creation for released orders:

- **Fulfillment creation with Multiple Shipping Routes**

  If you use the Multiple Shipping Routes feature and generate fulfillments per order, you can create a fulfillment record for each shipping route. Warehouse operators can pick, pack, and ship orders for items in the same shipping route. For more information, see the help topic Multiple Shipping Routes.
- **Fulfillment creation with Intercompany Cross-Subsidiary Fulfillments**

  When you process cross-subsidiary fulfillments for released orders, you create separate waves for an order according to the inventory location on the line items. In the same way, you generate separate item fulfillments for these orders, depending on your fulfillment creation preference. The Per Order preference consolidates the line items for each order in a released wave. For more information, see Setting Warehouse Management Preferences or Intercompany Cross-Subsidiary Fulfillment.

Completed pick tasks display the fulfillment record for each line item. To open a pick task and view the link, you can go to Transactions > Inventory > View Pick Tasks. Aside from the picking status, fulfillment records also display the status for packing and shipping. You can access and update fulfillment records directly through Transactions > Sales > Fulfill Orders > List. On sales or transfer orders, you can also track the fulfillment status of each line items.

Viewing the Status of Fulfillment Creation

The processing time for generating fulfillments may vary, depending on the number of transactions and other jobs in your queue. Users with the Administrator role can view the status of item fulfillment creation by going to Setup > Company > Company Management > Bulk Processing Status List. On the Process Status page, you can expand Filters and in the **Process Type** field, select **Order Release Fulfillment**. This filter displays the fulfillment creation jobs in your queue. You can click **Refresh** to get the latest status of the jobs in the list. For more information, see the help topic Searching Bulk Processing Jobs.

On the Process Status list, you can do the following:

- To view the results for each pick task line, you can click the status link in the Submission Status column.

  The list displays the status for each line, including any processing errors or the fulfillment record link for the successfully completed lines.
- To view the errors for a job, you can click the error link in the Message column.

  For more information, see Viewing Fulfillment Creation Failures.

To view the results of fulfillment creation for released orders, you can click the status link for a job. The list shows you the status and result of each pick task line included in the job. It also displays any processing errors or the fulfillment record link for successfully completed pick task lines. To handle errors in fulfillment creation, see Updating or Deleting Pick Tasks Generated from Waves.

Viewing Fulfillment Creation Failures

On a pick task, you can view failures that may occur because of inventory changes or order updates made during item fulfillment creation. You might also encounter errors when released orders are fulfilled directly from an order transaction or created outside of the wave.

On line items with failed fulfillments, you can view the failure reason and handle the errors accordingly. You have the option to retry the fulfillment creation or override it to fulfill orders directly from the order transaction. For more information, see Updating or Deleting Pick Tasks Generated from Waves.

To view errors for a fulfillment creation job, see Viewing the Status of Fulfillment Creation.

Posting Item Fulfillments for Partially Picked Orders

When processing pick tasks for released orders, you can mark open picks as done and post item fulfillment records for partially picked orders. You can post item fulfillments for the picked and staged items for an order when the other items cannot be picked due to insufficient inventory. You first search for partially picked orders and then select the orders for which you want to post item fulfillments. For more information about picking orders, see Picking Orders.

WMS Mark Open Picks Done

Item fulfillment creation for partially picked orders follows your Per Order or Per Order Line preference. If you use the Per Order setting, you generate fulfillments after you have marked done all partially picked orders and those that have not been started. Fulfillment records do not include pick tasks that have not been started, which have no picked quantity. For more information about the fulfillment preference, see Setting Warehouse Management Preferences.

To post an item fulfillment for partially picked orders:

1. Log in to your NetSuite WMS account using the Warehouse role.
2. Go to Shipping > Picking > Mark Open Picks Done.

   > **Important:** Do not use the menu option at Shipping > Post Item Fulfillment > Partially-Picked Orders.

3. In the **Location** field, select your warehouse location.
4. In the **Transaction Type** field, select whether you want to include sales orders or transfer orders on the item fulfillment.
5. Depending on which orders you want to include in the search results, set any of the filters in the Pick Task Details section:
   - **Wave #** - Enter the number of the wave used to release the orders or open picks.
   - **Transaction #** - Enter the transaction number of the sales or transfer order.
   - **Item** - Select the item for the released orders or open picks.
   - **Customer** - For sales orders, select the individual customer or company name.
   - **Ship Date** - Enter the ship date for the orders.
   - **Ship Method** - Select the ship method for the orders.
   - **Task Assigned To** - Select the name of the picker or warehouse operator assigned to the open picks.
6. Click **Display**.

   The **Picking** subtab displays the list of partially completed pick tasks or those in Started status. The list includes pick tasks in Ready status, which have not been started or with no picked quantity.
7. In the **Mark Done** column, check the box next to each pick you want to mark done and include in the item fulfillments.

   > **Note:** For pick tasks not started or in Ready status, you can mark them done without creating or including them in item fulfillments because they have no picked quantity.

8. Click **Submit**.

To view the generated item fulfillments, go to Shipping > Shipping > Fulfill Orders > List. For information about item fulfillment creation, see Item Fulfillments of Released Orders.

Releasing Orders to the Warehouse

Releasing orders to the warehouse initiates the outbound processing of orders for fulfillment using wave transactions. It enables you to select and prioritize the orders or line items you want to include in a wave. When you release a wave, you make the orders available for picking on mobile devices and further fulfillment processing.

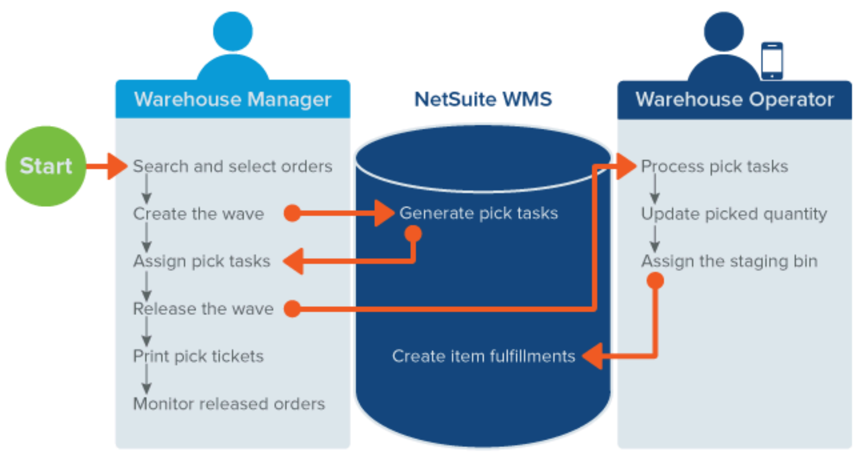
The NetSuite transaction and record used for releasing orders to the warehouse are described as follows:

- **Wave** - Wave transactions contain the list of orders you want to release and their associated pick tasks. For more information, see Creating Wave Transactions.
- **Pick Task** - Pick task subrecords display picking details, including quantity, status, and pick assignment. It records picking details gathered through a mobile device.

  You can generate pick task subrecords only from wave transactions. For more information, see Assigning Pick Tasks and Releasing a Wave.

WMS Releasing Orders to the Warehouse

The following diagram illustrates the sequence of tasks involved when you release orders to a warehouse that uses bins:



In a sample scenario, you create a wave with orders to be delivered by a shipping provider along a specific route. Narrow down the list of orders based on priority or ship date. From a wave, NetSuite WMS generates the pick tasks, which you can assign to warehouse operators or pickers. You can manage both the list of orders for release and pick tasks on a wave transaction.

Pickers that you assign to one or more tasks can update their progress using a mobile device. Any picker can access and process unassigned pick tasks. Based on pick task updates, NetSuite WMS updates the status of the associated wave. It also generates items fulfillments from completed pick tasks. On both wave transactions and pick task subrecords, you can track the progress as soon as you release the orders to the warehouse.

Supported Transactions and Item Types

To include orders in wave transactions, make sure they meet the following conditions for transactions and item types:

- Sales or transfer order transactions must be unfulfilled.
- Orders must have fully or partially committed line items not included in any active waves.

  This condition does not apply to non-inventory items, which cannot be committed.
- Items must belong to the following supported item types:
  - Inventory and assembly items, including, matrix, lot numbered, and serialized items
  - Kit/package items

    Service and non-inventory items (for sale and for resale only)

    > **Note:** To release and fulfill orders for these item types, you must enable the **Can be Fulfilled/Received** setting on the item record. For more information about creating fulfillable items, see the help topic Entering Preferences on Item Records or Fulfilling Inventory.
  - Item groups
- Orders or line items must be associated with a warehouse location.

  By default, NetSuite WMS filters transactions to include in a wave using the location in the header for sales orders and the from location for transfer orders. For information about creating warehouse locations, see Creating Warehouse Locations.

See Creating Wave Transactions to learn how specific preferences affect the orders that you can release to the warehouse. For more information about items, see the help topic Item Types.

Limitations

Note the following limitations for releasing orders to the warehouse:

- You can create waves only for sales and transfer order transactions.
- The following preferences or settings do not apply when fulfilling released orders:
  - **Fulfill Based on Commitment** - Non-committed item quantities cannot be included in waves. Using NetSuite WMS, you can release and fulfill only fully or partially committed items. See the help topic Fulfillment.
  - **Allow Overage on Item Fulfillments** - For released orders, you cannot pick more than the quantity on the pick task. See Picking Orders.
  - **Use Item Cost as Transfer Cost** - Even with this preference enabled for transfer orders, you can release and fulfill partially committed items. For more information, see the help topic Transfer Order Preferences.
- Multi-level kit/package items cannot be included in wave transactions. You cannot release orders for kits with kit/package components.
- Pick task reversal for non-inventory items is not supported. For more information about reversals, see Pick Task Reversal.
- Refer to other limitations and conditions in the following topics: Creating Wave Transactions and Creating Custom Wave Criteria Templates.

Creating Wave Transactions

Creating a wave transaction starts by searching for committed orders or order lines that you want to release to the warehouse. On a new wave, you can view the orders retrieved from your search and select the ones to include in the wave. You can select the entire order or specific line items only. Line items that you do not include in a wave can be processed in another one.

See how the following features or conditions affect the orders you can include in waves:

- Your order search can return a maximum of 10,000 line items in the results on wave transactions. If you exceed this limit, you can adjust the search criteria on the Wave Criteria form.
- A wave transaction uses the item units on its associated order transaction.

  > **Note:** If you want to assign a unit to an item that you want to include in a wave, make sure you set the unit on the item record or order transaction before you create the wave.

  If the item record has no unit, you can assign the unit on the order transaction. After you create the wave, you cannot assign or change the unit on the order transaction. Changing the unit on the item record does not affect the unit on the existing order and wave transactions.

  If an item is associated with multiple units, you can choose a different unit for the quantity you want to pick on your mobile device. After you process the pick task, the quantity is converted based on the order transaction's unit.
- Intercompany Cross-Subsidiary Fulfillment - On sales or transfer orders, use of this feature requires you to select the inventory location for each line item. This enables you to commit the line items and include them in waves.

  With this feature enabled on your account, you can create separate waves for orders with different inventory locations in its line items. To include these orders in waves, inventory locations must be warehouse locations. For more information about locations, see Creating Warehouse Locations.
- **Ship Complete** - Using the Ship Complete setting on order transactions, you can include only orders with all fully committed line items in a wave. When combined with the Intercompany Cross-Subsidiary Fulfillment or the Multiple Shipping Routes feature, you can include fully committed line items only, instead of the entire order. However, if a partially committed line item has the Commitment Confirmed box checked, you can include it in a wave. For more information about the features, see the help topic Multiple Shipping Routes or Intercompany Cross-Subsidiary Fulfillment. For more information about the commitment preference, see Setting Warehouse Management Preferences.
- **Partially Committed Items** - You can add a partially committed line item to a wave if the same line is not included in an active wave. The active wave has to be completely processed before you can include the line item in a new wave. Alternatively, when you have a partially committed line item, you can edit the order transaction to create a separate line for the uncommitted quantity. When this line is committed, you can include it in a new wave without waiting for the active wave to be processed.
- **Kit/Package Items** - For kit/package items, you can include partially committed kit components that form a single order of a kit/package item. You cannot release kit/package items with missing components. If a kit requires 2 units of component A and 1 unit of component B, you cannot release a partially committed order that has only 1 unit of component A.

To create a wave transaction:

1. Using the WMS Warehouse Manager role, go to Transactions > Inventory > Create a Wave.
2. On the Wave Criteria form, apply your search criteria by doing the following:
   a. In the **Template** field, select the default template or a predefined custom template.
   b. (Optional) To update the default search criteria directly on the form, you can select or enter values in the filtering fields.

   Your search criteria updates on this page do not alter a template. If you want to edit or create a custom template first, see in the Creating Custom Wave Criteria Templates.
3. Click **Search**.

   A new Wave page appears to display the retrieved orders on the **Orders** and **Line Items** subtabs. On each subtab, you can click the column headers to sort the transactions, such as by order number or item. For transfer orders, you can sort by to location.

> **Tip:** If you do not see the orders you want to release, click **Back** to use another template or update your search criteria. For information about orders you can include in waves, see Supported Transactions and Item Types.

4. On the Wave page, set the following fields:
   - **Priority** - (Optional) Select the priority number, from **1** (top priority) to **9** (lowest priority).

     On a mobile device, high priority waves appear at the top of the list.
   - **Picking Type** - Select one of the following picking types: **Bulk Picking**, **Single Order**, or **Multiple Orders**.

     The picking type determines the grouping of line items on pick tasks and pick tickets. For more information, see Assigning Pick Tasks and Releasing a Wave or Printing Pick Tickets from Wave Transactions.
5. In the **Status** field, select one of the status options:
   - **Pending Release** – Generates pick tasks and saves the wave.
   - **Released** - Generates pick tasks and releases the wave.

     This option skips the pick task assignment. NetSuite WMS automatically assigns a pick task to the picker who processes the task on a mobile device.
6. On the **Orders** subtab, check the box next to the orders you want to release.

   When you select an order, you preselect the associated line items by default.

   > **Tip:** To view orders with partially committed items, look for orders marked with the information icon. If you want to exclude them from the wave, clear the box for each order. You can also go to the **Line Items** subtab to clear the box for specific line items.
7. On the **Line Items** subtab, clear or check the box next to each item you want to remove from or include in the wave, respectively.
8. (Optional) Before you save the wave, you can review the total selected orders and line items in the Summary table.
9. Click **Save**.

   You can view the list of generated tasks by clicking the **Pick Tasks** subtab. Pick tasks for non-inventory items appear at the bottom of the list. If you want to assign pick tasks to warehouse operators, see Assigning Pick Tasks and Releasing a Wave.

   You can view the list of saved and released waves by going to Transactions > Inventory > Release Orders to Warehouse > List.

If you have uncommitted quantities in an order, you can release the associated lines when the quantities after the quantities have been committed. For more information, see Re-releasing Lines with Backorders.

Assigning Pick Tasks and Releasing a Wave

When you release a wave, NetSuite WMS generates pick tasks from the line items of released orders, or from kit components particularly for kit/package items. When you release a wave, NetSuite WMS generates pick tasks from the line items of released orders, or from kit component lines for kit/package items. Regardless of the item type, it generates pick tasks based on any of the following picking type settings on the wave:

- **Single Order** picking type - Generates a pick task for each line item of an order. For kit/package items, you generate one pick task for each component item.

- **Multiple Order** or **Bulk Picking** picking type - Generates a pick task that contains similar items, including components of kit/package items, across all orders in the wave. On a mobile device, you can pick the entire quantity of an item in a bulk order all at the same time. For a multiple order, you can pick the quantity of an item per order.

> **Important:** Releasing orders through NetSuite WMS prepares them for item fulfillment. You must not use the **Fulfill** option on sales or transfer order transactions. Fulfilling released orders outside of a wave causes errors or failures when pickers process the orders from their mobile device. For more information, see Item Fulfillments of Released Orders.

For more information about picking types, see Creating Wave Transactions. For more information about single and multiple order picking, see Picking Orders.

Before you release a wave, you can assign one or more pick tasks to a warehouse operator or picker. On the mobile device, any picker can access and process unassigned pick tasks. After selecting and processing a pick task, the picker's name appears on the pick task subrecord. If you use the **Allow staging for assigned picker only** system rule, only the picker assigned to the pick task can stage the items. For more information about this rule, see System Rules for NetSuite WMS. To set up picker roles, see Warehouse Management Roles.

To assign pick tasks and release the wave:

1. Using the WMS Warehouse Manager role, go to Transactions > Inventory > Create a Wave > List.
2. From the list of waves, click **Edit** next to the wave you want to update.
3. On the Wave page, click the **Pick Tasks** subtab, and then do any of the following:

   > **Tip:** Click the column headers to sort pick tasks by item or unit of measure, for example.

   - To assign one task at a time, on the **Assigned Picker** column, select the name of the warehouse operator for each pick task.
   - To assign multiple tasks to the same warehouse operator:
     1. In the **Assign Selected Pick Tasks To** field, select the name of the warehouse operator.
     2. Check the box for each pick task that you want to assign.

        > **Tip:** Check the box in the column header to select all pick tasks and assign them to the same picker.

     3. Click **Assign Pick Tasks**.
4. Click **Assign Pick Tasks**.
5. In the **Status** field, select **Released**.
6. To save your updates and release orders to the warehouse, click **Save**.

   On the **Pick Tasks** subtab, you can access and view pick tasks to monitor the progress of mobile picking. On a pick task subrecord, line items for kit components display the kit/package item in the **Subitem Of** column. For more information, see Monitoring the Status of Released Orders or Picking Orders.

   Released waves also sort pick tasks and, for warehouses that use bins, determines the recommended bin for picking. See Pick Task Sorting for Released Orders.

Viewing Failed Pick Task Lines

Pick task failures might occur because of discrepancies between waves and their associated sales or transfer orders. For information about updating orders included in waves, see Handling Changes to Associated Sales or Transfer Orders.

For example, a pick task might not be generated when you decrease the ordered item's committed quantity below the quantity released in a wave.

When pick tasks fail, you can review the details on the wave, as follows:

- In the Summary table, view the total number of failed line items.
- On the **Pick Tasks** subtab, view the status of the failed task, which could be either of the following:
  - **Done** - Status of pick tasks with all completed or all failed line items.
  - **Ready** - Status of pick tasks with no failed line items, or with one or more failed lines.

  To open a pick task, click the pick task number. On the pick task subrecord, look for line items marked Failed with the failure reason displayed beside the status. For kit/package items, a pick task failure for one component causes pick tasks for other components to also fail.
- On the **Orders** subtab, verify any changes to the committed lines of orders with failed pick tasks.

  If the total selected lines exceed the committed lines, the tasks may have failed because of a commitment change for an item or a component of a kit/package item. You can click the order number link to view the committed quantity for the item and other order details.
- On the **Line Items** subtab, click the order number to open the associated order transaction.

For more information about pick tasks, see Updating or Deleting Pick Tasks Generated from Waves.

Creating a Wave Release Schedule

When you create a wave release schedule, you specify the orders and the frequency of release. To specify the orders to include in a wave, use the standard wave template or a custom template with your predefined filters. For information about wave templates, see Creating Custom Wave Criteria Templates.

To define your release schedule, select the days of the week and run time period within those days.

For example, you can create the following schedule for releasing sales orders from Warehouse A:

- **Release Day** – every Monday, Wednesday, Friday, and Saturday
- **Release Frequency** – every hour
- **Run Time** – from 10:30 a.m. to 12:00 p.m.

On each release day, NetSuite WMS searches for valid sales orders from Warehouse A. Then, it submits a job to create and release a wave transaction. It repeats the process every hour within the run time period. To review the guidelines and limitations for releasing orders, see Releasing Orders to the Warehouse.

To create a wave release schedule:

1. Using the WMS Warehouse Manager role, go to WMS Outbound > Wave > Schedule Wave Release > New.
2. On the WMS Wave Release Schedule page, in the **Template** field, you can select the default template or your custom wave criteria template.

   Fields in the Primary Information section are populated with corresponding details from the template. You can edit them at any time.

   After you save the schedule, you cannot change the template anymore.
3. In the Primary Information section, you can select or enter values in the following fields:
   - **Location** - Select the warehouse location.
   - **Transaction Type** - Select one of the following transaction types: **Sales Order** or **Transfer Order**.
   - **Picking Type** - Select one of the following picking types: **Single Order**, **Multiple Orders**, or **Bulk Picking**.

- (Optional) **Wave Priority** - Select the priority number, from **1** (top priority) to **9** (lowest priority).
- **Status** - Select one of the following statuses that you want to assign to the generated wave: **Pending Release** or **Released**.

For more information about these fields, see Creating Wave Transactions.

4. In the Release Schedule section, you can set the following required or optional fields:
   - **Wave Order Limit** - Enter a number, greater than or equal to one, to indicate the maximum limit for the orders you want to include in a wave.

     If you use custom wave templates, you can adjust the filters to lessen or increase the number of orders available for release.
   - **Generate Multiple Waves** - If you enter a wave order limit, you can check this box.

     It indicates that you want to create multiple waves during each scheduled release. You can release up to 500 waves at a time.
   - **Wave Release Limit** - If you generate multiple waves, enter a number, between 1 to 500, for this wave limit.

     For each scheduled release, the number of generated waves does not exceed this number. The next release schedule includes any remaining orders retrieved by your wave template or criteria.
   - **Release Day** - Select **Every Day** or specific days of the week on which you want to release waves.
   - **Release Frequency** - Select the frequency at which you want to run the schedule within a release day.
   - **Run Time Start** - Enter the time you want NetSuite WMS to start running the schedule.
   - **Run Time End** - Enter the time you want NetSuite WMS to stop running the schedule.
5. (Optional) In the Email Notification section, you can set your email preference in the following fields:
   - **Send an Email when Request Status Changes to** - Select one or more of the following statuses at which you want to notify recipients: **Failed** or **Wave Created**.
   - **Email Address for Wave Created Status** - Enter the email address to which you want to send notifications for successfully created requests.
   - **Email Address for Failed Status** - Enter the email address to which you want to send notifications for failed requests.

   Separate multiple addresses with a semicolon.
6. To save the schedule, click **Save**.
7. On the **Release Status** subtab, you can view the job status and details for wave creation and release during the schedule run.

   After NetSuite WMS completes the job, you can click the number of the wave you want to access. On your mobile device, you can pick the items included in the released wave. See Picking Orders.

If you have uncommitted quantities in an order, you can release the associated lines when the quantities after the quantities have been committed. For more information, see Re-releasing Lines with Backorders.

Re-releasing Lines with Backorders

When you commit quantities to a backorder, you can release it in a wave. The newly committed quantities are included in the wave used to release the initial quantities. However, if you have started to pick the items in the existing wave, NetSuite WMS automatically includes them in a new wave.

To re-release lines with backorders:

1. Using the Warehouse Manager role, go to WMS Outbound > Wave > Create a Wave.
2. On the Wave Criteria form, apply your search criteria by doing the following:
   a. In the **Template** field, select the default template or a custom one that contains your predefined filters.
   b. In the **Location** field, select a warehouse location.
   c. (Optional) In the **Transaction** field, you can enter the number of the order that contains the newly committed quantities.

      If you want to release items from different orders in this wave, do not set this filter.
   d. (Optional) You can add more search criteria using the other filtering fields.

      Your search criteria updates do not alter the predefined filters on a template. If you want to edit or create a custom template, see Creating Custom Wave Criteria Templates.
3. Click **Search**.
4. On the Wave page, enter or select values for the wave settings.

   For detailed instructions, see Creating Wave Transactions.
5. On the **Orders** subtab, check the box next to the orders you want to release.
6. Click **Save**.

If some of the items are released in an existing wave, the confirmation message appears with the wave number.

You can process items released in a new wave through a separate pick task. Fulfillments generated from the wave follow your preference of per order or per order line fulfillment. See Picking Orders or Item Fulfillments of Released Orders.

Updating Waves and Handling Wave Issues

You can edit unreleased waves, delete released and unreleased waves, and update waves with discrepancy issues. See the following topics:

- Updating Waves
- Handling Wave Issues

Updating Waves

You can perform specific updates to unreleased and released wave transactions. To access an existing wave, you can go to Transactions > Inventory > Create a Wave > List, and then click **Edit** for the wave you want to update.

On an unreleased wave, you can do the following updates:

- **Assign pickers to pick tasks** - On the **Pick Tasks** subtab, you can update an unreleased wave to assign pickers to pick tasks. See Assigning Pick Tasks and Releasing a Wave.
- **Change the wave form** - In the **Custom Form** field, you can switch to a custom wave form.

  On both unreleased and released waves, you can generate and print pick tickets from the template associated with the standard or custom wave form. For more information about custom forms and pick tickets, see the following topics:
  - Creating a Custom Pick Ticket Saved Search
  - Creating Custom Advanced Templates for Pick Tickets

- Creating Custom Wave Forms

In edit mode, you can also delete waves by clicking **Delete** from the Actions list. See the following guidelines for deleting waves:

- You can delete unreleased waves.
- You can delete a wave in Released status or one that has no associated pick tasks.

  In case you want to delete a pick task from a released wave, see Updating or Deleting Pick Tasks Generated from Waves.

  When you have started to process a pick task, you can no longer delete the wave. If you want to reverse completed pick tasks and release the orders in a new wave, see Pick Task Reversal.

Orders or line items that you disassociate from a deleted wave can be included and released in a new wave.

Handling Wave Issues

NetSuite WMS automatically displays a warning message on wave transactions that have discrepancy issues. These waves contain pick tasks that do not reflect the current status of the sales or transfer order. They can also be associated with orders released in other waves that have pick tasks in the same state. As a result, the pick tasks remain in In Progress status and you have no option to delete or complete the waves. To resolve these issues for all affected waves at the same time, you can click the link on the warning message to automatically set the pick tasks to Done status and the waves to Complete status.

Printing Pick Tickets from Wave Transactions

Pick tickets provide details of released items and pick tasks for processing. The picking type of the wave determines the grouping of items on a pick ticket. For information about picking types, see Creating Wave Transactions or Picking Orders.

- **Single Order Pick Ticket** - Pick ticket for each released order, containing all line items included in the wave.
- **Multiple Order Pick Ticket** - Pick ticket for each pick task with similar items across the orders included in the wave.

When you release orders with multiple shipping routes, single order pick tickets group together the line items that have the same shipping route. Multiple order pick tickets display the shipping address, carrier, and method for each line item. For more information, see the help topic Multiple Shipping Routes.

On each ticket, the pick tasks follow the ascending order of the recommended bins’ sequence numbers. Any non-inventory items, having no recommended bin, appear at the bottom of the list.

> **Note:** To view or print pick tickets, be sure to enable the required Advanced PDF/HTML Templates feature. Before printing pick tickets, make sure that your account does not use the Print Using HTML general preference. Pick ticket documents are optimized for PDF, which you can view and print using Adobe Reader. For more information, see the help topic Enabling the Advanced PDF/HTML Templates Feature or Personal Preferences for Transactions.

To print pick tickets from a wave transaction:

1. Go to Transactions > Inventory > Release Orders to Warehouse > List.
2. From the list of waves, click **View** next to the wave you want to open.
3. On the Wave page, click the print icon to open the pick ticket.
4. On the toolbar of the pick ticket document, click the print icon.

If you want to save a soft copy of the pick ticket in PDF, click the download icon.

Handling Changes to Associated Sales or Transfer Orders

After you save a wave and generate pick tasks, you cannot change the following fields on the associated sales or transfer order:

- Location in the header
- Item or unit of measure on a line item
- Serial or lot number in the inventory detail

You can add more items and increase the ordered quantity. You can also decrease the ordered quantity, but not below the quantity included in a wave.

Order changes do not reflect on the saved wave. To handle such changes, you can release additional orders in another wave. If you want to delete the wave and release the orders in a new one, see Updating Waves and Handling Wave Issues.

Updating or Deleting Pick Tasks Generated from Waves

On the NetSuite WMS user interface, you can update pick tasks to reflect updates to a released order or item. You can also troubleshoot pick task failures that might occur during the release of orders or fulfillment creation.

> **Note:** NetSuite recommends using the mobile device to record picking details, such as picked quantity, inventory details, and staging bin. Updates by a picker through the mobile device reflect on associated pick task subrecords. For more information, see Picking Orders.

Access pick tasks by going to Transactions > Inventory > View Pick Tasks. From the list of pick tasks, click **Edit** for the record you want to update. Alternatively, from a wave, go to the **Pick Tasks** subtab, and then click the pick task number. On a pick task, you can do the following:

- **Retrieve order or item updates** - On a pick task, click **Match** to retrieve the latest updates to orders or items and display them in their corresponding fields.

  Pick tasks with order or item changes affect the recommended bin sorting and selection. For example, you release an order for an item with no bin, and then switch the item to use bins before picking has started. When you update the pick task to reflect the new item setting, NetSuite WMS sorts the bins and displays the recommended bin. For more information about recommended bins, see Recommended Bin Sorting or Updating Pick Strategy Matching.
- **Retry failed pick task line items** - You can retry creating or updating fulfillment records for pick task line items that fail the initial creation or update.

  For each failed pick task line item, view the **Failure Reason** and **Allow Retry** columns. If **Allow Retry** is set to **Yes**, you can retry the fulfillment creation or update. If set to **No**, you cannot retry the process because of errors, such as missing transactions or orders that might have been fulfilled outside of the wave.

  Before you retry, you must address any errors by reviewing the associated order transaction or item record and updating them accordingly. After completing your updates, make sure to refresh your browser, and then click **Retry Updates**. This option retries the fulfillment creation for all failed line items on the pick task.
- **Override fulfillment creation from pick tasks** - In edit mode, you can check the **Override Fulfillment Creation** box for a failed pick task line if you want to fulfill the picked items outside of the wave.

Note: If you select this option, you cannot retry fulfillment creation from the pick task subrecord. Also, you cannot revert or clear the **Override Fulfillment Creation** box anymore.

When you select this option, you can fulfill the item directly from its associated order transaction or through bulk fulfillment. For more information about these fulfillment options, see the help topic Fulfilling Orders. For information about failed fulfillments, see Viewing Fulfillment Creation Failures.

If you select this option for a failed pick task line of a kit/package item's component, you must do the same for the failed pick task lines of its other components.

- **Delete pick task subrecords** - To delete a pick task, you can click **Delete** from the Actions list.

  In edit mode, you can delete an entire pick task subrecord in Pending or Ready status. When you delete pick tasks from a wave and you want to release the disassociated line items in a new wave, you must also delete the existing wave. See Updating Waves.

  Important: Be aware that when you delete the pick task subrecord for a kit component, you cannot fulfill the associated order for the entire kit or package. A released order for a kit/package item with missing components cannot be fulfilled.

  You cannot delete failed pick tasks, but you can retry processing the fulfillment records. For staged and completed pick tasks, you can reverse the line items, and then release these lines in a new wave. For more information, see Pick Task Reversal.

Pick Task Sorting for Released Orders

NetSuite WMS sorts bins for warehouse locations that use bins and sorts items for warehouse locations that do not use bins. For warehouse locations that use bins, you can apply pick strategies to target zones that contain bins for specific orders, like rush orders. Bins located in the target zones go through the same bin sorting process.

See the following topics in this section:

- Recommended Bin Sorting
- Bin Sorting with Pick Strategies
- Updating Pick Strategy Matching
- Item Sorting

Recommended Bin Sorting

The bin sorting process involves a series of filtering and sorting levels for bins when you release orders to the warehouse. For each pick task, it determines the recommended bin from the list of bins associated with the item. Pickers can view recommended bins on their mobile device as they pick the orders.

Prior to sorting, NetSuite WMS filters the items and bins based on the following criteria:

- Bins must be in the same warehouse location as the wave.
- Bins must have available inventory.

  You can view the available quantity of a bin on the associated item record.
- Items must be fulfillable and use bins. In addition, items must not belong to the non-inventory types and to locations that do not use bins.

The bin sorting process excludes items and bins that do not meet the criteria. The remaining bins qualify for selection as the recommended bin for a pick task.

In the following diagram, you can view the order of the sorting levels and the preferences that can alter their sorting conditions.

Based on bin settings, the filtered bins go through four basic levels of sorting:

1. **Available Quantity** - Initially, NetSuite WMS identifies the bins with sufficient quantity to satisfy the quantity to pick. It separates these bins from those with insufficient quantity. It also sorts the bins with insufficient quantity in descending order.

   > **Note:** For lot-numbered items, your rotation type setting enables bin sorting by lot expiration date. Based on a lot item's FEFO or LEFO rotation type, NetSuite WMS arranges bins in ascending or descending order, respectively. This sorting occurs before sorting by available quantity. For more information about rotation types, Creating Items for NetSuite WMS.

2. **Preferred Bin** - From the bins with sufficient quantity, this sorting level identifies and recommends a preferred bin. If all preferred bins contain the same quantity, these bins go through the next sorting level.

   > **Note:** If you use the Pick to Clean preference, NetSuite WMS recommends the bin with the highest available quantity among those with insufficient quantity. You direct pickers to empty these bins first before a preferred bin with sufficient quantity. Note that these bins with insufficient quantity may also include preferred bins. For more information about this preference, see Setting Warehouse Management Preferences.

3. **Bin Type** - Candidate bins from the first or second sorting levels that have the same quantity are further sorted by bin type. This sorting level arranges bins according to the following order of bin types: (1) Picking, (2) Storage, (3) None.

   > **Note:** The sorting process filters out bins that do not belong to any of the valid bin types. If you have pick strategies that use the Include Inbound Staging Bins setting, you include Inbound Staging as the fourth valid bin type. For more information about pick strategies, see Bin Sorting with Pick Strategies.

4. **Bin Sequence Number** - Only bins of the same type go through this level of sorting by sequence number, in ascending order. Bins with no sequence number move to the bottom of the list.

   For example, among the bins with sufficient quantity, you have no Picking bin. But you have 3 Storage bins that contain the same available quantity. To recommend a bin, NetSuite WMS sorts them by bin sequence number.

On a wave transaction, you can view the recommended bin for each pick task on the Pick Task subtab. On a pick task subrecord, you can view the complete list of filtered and sorted bins on the Recommended Bins subtab.

Bin Sorting with Pick Strategies

Pick strategies provide an optional way of defining and prioritizing the warehouse zones for picking of released orders. Use pick strategies to target the zones where you want pickers to pick specific orders or items. From a mobile device, pickers can view the target zones and bins that contain the items.

You can also use pick strategies for work orders and replenishment, even if these transactions are not released in waves. When you process these transactions on a mobile device, you can view the list of bins sorted through your pick strategies.

To create pick strategy records, see Defining Pick Strategies.

The following steps describe how NetSuite WMS applies pick strategies to a pick task:

1. **Matching strategies to a pick task** - Pick strategies contain the following required and optional filters used for matching, which you can define based on your business requirements:
   - **Required filters** - Transaction type and location

     Based on the required filters, you apply a pick strategy to pick tasks that match the transaction type and warehouse location.
   - **Optional filters** - Item Criteria filters (item process family, item process group, item, units, and item classification); Order Criteria filters (order type and customer); Recommended Bin Filters (Include Inbound Staging Bins and inventory status)

     Optional filters further define or limit the strategies that you can apply to a pick task. For example, you have a rush order setting for the Order Type field on order transactions. You can create a pick strategy for rush orders using the order type filter. This pick strategy matches only to pick tasks associated with transactions marked with the same rush order setting.

     If you use the Include Inbound Staging Bins filter, you include inbound staging bins in the recommended bin sorting process. For more information, see Recommended Bin Sorting.

     If you use the Inventory Status feature and define the inventory status filter, you prioritize the bins with items that match the status. Bins with items that do not match the status also appear on the pick task, but without a matching pick strategy.

     For more information about pick strategy filters, see Defining Pick Strategies.
2. **Sorting strategies by sequence number** - This step involves the sorting of multiple matching strategies by sequence number, in ascending order.
3. **Determining the zone from a matching strategy** - On a pick strategy, you can prioritize your list of warehouse zones using sequence numbers. For each matching strategy, NetSuite WMS selects the first zone from your list list that has one or more bins containing the item on the pick task. Bins from the selected zone go through the bin sorting process, which determines the recommended bin for the pick task. For information about this process, see Recommended Bin Sorting.

On a pick task, you can view the matching pick strategies, along with the bins and zones, on the Recommended Bins subtab.

Updating Pick Strategy Matching

Updates to your bin configuration and inventory quantities can affect the selection of pick strategies and recommended bins. On waves and pick tasks, you can click the **Match** button to reflect such changes.

On a released wave, the Match button enables you to do the following:

- On wave transactions, click **Match** to retrieve updates for all pick tasks in the wave.

  You can view any updates in the Recommended Bin column on the Pick Tasks subtab. You can also view updates on any affected pick task subrecords.
- On pick task subrecords, click **Match** to retrieve updates for a single pick task.

  Your updates appear in the Recommended Bin field of the Pick Information section, Recommended Bins subtab, or both. They also reflect on the associated wave transaction.

Item Sorting

Within each warehouse location that does not use bins, NetSuite WMS sorts items using their assigned sequence number, in ascending order. On your mobile device, you can view the sorted items and process the pick tasks accordingly.

Item sorting also applies to work orders processed through a mobile device, even if work orders are not released in waves. For each work order, you can view and pick the sorted list of component items.

For information about setting pick sequence numbers, see Creating Items for NetSuite WMS.

Monitoring the Status of Released Orders

Wave transactions display the status of all associated pick tasks as pickers process and fulfill them on a mobile device. You can access a wave by going to Transactions > Inventory > Release Orders to Warehouse > List. On a wave, you can track the progress through the following statuses:

- Wave Statuses
- Pick Task Statuses
- Pick Task Line Item Statuses

Wave Statuses

You can view the status of a wave at the top left corner of the Wave page, beside the wave number, and in the Status field in the Primary Information section.

- **Pending Release** - In this status, you have the option of assigning pick tasks to warehouse operators. You cannot add or remove orders, but you can still delete the wave transaction.
- **Released** - This is the default status of a wave. Pending waves that you release to the warehouse transition to this status. Pickers gain access to pick tasks through their mobile device, so you cannot directly update pick task assignments on the wave.
- **In Progress** - In this status, one or more pick tasks have been updated by the picker so you cannot delete the wave transaction anymore.
- **Complete** - Waves transition to this status when all associated pick tasks have been completed by the pickers. Deleting all pick tasks of a wave also sets the wave to this status.

Pick Task Statuses

You can view the overall status of a pick task on the Pick Tasks subtab of a wave. You can also view this status in the header of a pick task subrecord.

- **Pending** - Initial status of a newly generated pick task. The wave has not been released yet, so you can assign a picker to the pick task.
- **Ready** - When you release the orders, the associated pick tasks transition to this state. On the pick task record, you can still change the picker or delete the pick task. For more information, see Updating or Deleting Pick Tasks Generated from Waves.
- **In Progress** - In this status, the pickers have started processing a pick task, so you cannot delete the pick task subrecord. They also may have staged or completed one or more line items.

  Pick tasks with failed line items also display this status. For more information, see Pick Task Line Item Statuses.
- **Done** - In this status, all pick task line items have been completed or reversed. For more information, see Updating or Deleting Pick Tasks Generated from Waves.

Pick task subrecords display the picking details recorded using a mobile device. The details include picked quantities and the status of each pick task line item. To access from a wave, you can click the pick task number link on the **Pick Tasks** subtab. You can also go to Transactions > Inventory > View Pick Tasks.

Pick Task Line Item Statuses

On a pick task subrecord, you can monitor the progress of a single picker. On the Line Items subtab, you can view the individual picked quantities, status, and picking dates. Pick task line items automatically transition to the following statuses as pickers process the tasks on a mobile device:

- **Ready** - Initial status of a pick task line item, for a pick task on Pending or Ready status.
- **Started** - Pick tasks that have partially picked quantities move to this status. The picker has updated the picked quantity or inventory details of the pick task line item but has not completed the pick.
- **Picked** - In this status, the picker has completely picked all the items.
- **Staged** - Assigning a staging bin transitions pick task line items to this status.
- **Done** - NetSuite WMS automatically assigns this status to pick task line items completed by a picker on a mobile device. After fulfillment creation, the line item displays the link in the Transaction Number column. For more information, see Item Fulfillments of Released Orders.

  Reversed pick task lines also display this status. See Pick Task Reversal.
- **Failed** - Line items in this status have failed the release of the wave or fulfillment creation. To handle failed pick task line items, see Viewing Failed Pick Task Lines or Updating or Deleting Pick Tasks Generated from Waves.

You can also view the overall status of a pick task in the Primary Information section and the total picked quantity in the Pick Information section. For more information about the overall status, see Pick Task Statuses.

Picking Orders

Picking an order involves pulling items from your warehouse's inventory to fill an open order. You can pick a single order or multiple orders at a time. When you pick items using a mobile device, NetSuite WMS can guide you through the warehouse by suggesting the bin locations from which to pick items. It also decreases the available stock level of picked items. On your mobile device, you automatically skip the steps for bin entry and staging when you pick non-inventory items or items from warehouse locations that do not use bins.

For single order picking, you can select an unreleased order to pick and automatically generate the wave transaction. Like orders released in waves, sales or transfer orders must be in Pending Fulfillment status and must have committed lines.

For more information about order processing in NetSuite WMS, see Releasing Orders to the Warehouse or Limitations.

You can set the following system rules or preferences to modify order picking through NetSuite WMS:

- NetSuite WMS submits jobs to process the picking of orders that exceed 50 pick task lines and the staging of orders that exceed 25 pick task lines. If you activate the system rules for bulk picking or bulk staging, you can change these default limits for the number of pick tasks.
- If you activate the Enable Tally Scan rule, each time you scan a picked item, you increment the picked quantity by 1. This rule displays the Tally Scan field on the Enter Quantity page.
- If you activate the Use carton rules, you can use cartons for single and multiple order picking. It adds the Enter Carton page to the appropriate order picking flow.

  You can reuse a pick carton after you pack all of its items. The fulfillments associated with the items must be in Packed status.

  Aside from multi-order picking, the Use cartons for multi-order picking? rule also applies to bulk order picking of serialized items only. Serialized items included in waves for bulk order picking follow the multi-order picking flow. You can pick serialized items per order and place them in pick cartons.

  If you activate one of these rules and use the Mobile Printing capability, you can enable pick carton label printing. You can activate the Print pick carton labels? rule for each process in which you use pick cartons. It adds the Mobile Printing capability to the Enter Carton page.
- For picked or staged items, you can set your fulfillment preference to automatically generate fulfillment records per order or per order line. When you process partially picked items, you must close the pick tasks first, before you can generate the fulfillments.

- To enable picking items from zones, see Picking Orders from a Zone.

For more information about system rules, see System Rules for NetSuite WMS. For more information about fulfillment, see Setting Warehouse Management Preferences or Posting Item Fulfillments for Partially Picked Orders.

WMS Mobile Picking a Single Order

For instructions, see the following order picking topics:

- Picking Items for Single Orders
- Picking Items for Multiple Orders
- Performing Bulk Order Picking
- Picking Orders from a Zone

Picking Items for Single Orders

On your mobile device, you can pick committed items that you have released in wave transactions or added to sales or transfer orders. When you process an order not released in a wave, NetSuite WMS automatically generates the wave and pick tasks. If your order contains lines from different locations, you process them separately. To review the conditions for orders that you can include in waves, see Releasing Orders to the Warehouse.

When you process orders for warehouses with no bins or non-inventory items, skip the steps for bin entry and staging.

To pick items for a single order:

1. Access the order selection page by doing the following:
   a. On your mobile device, tap the menu icon at the left corner of the header, and then tap **Main Menu**.
   b. On the Main Menu page, tap **Picking**.
   c. On the Picking page, tap **Single Order Picking**.
   d. On the Select Picking Mode page, tap one of the following options:
      - **Unreleased Orders** – to process an order not yet included in a released wave
      - **Released Orders** – to process an order included in a released wave
   e. On the Select Order Type page, tap either **Sales Order** or **Transfer Order**.

      The field names in the succeeding pages may vary, depending on your selected order type.
2. On the Select Order page, do one of the following:

   > **Important:** For unreleased orders, NetSuite WMS automatically creates a wave in Released status after you select an order. You can access it from the Related Records subtab of the order transaction. In case you want to leave the session without completing the order picking, you can continue from the Released Orders picking mode. See step 1d.

   - In the **Scan/Enter Sales Order #** field, scan or enter the order transaction number. If you enter the data, tap **Enter Order #** to proceed.
   - From the Sales Orders list, tap the order number.
3. On the Select Pick Task page, do one of the following:
   - In the **Scan/Enter Pick Task #** field, scan or enter a pick task number. If you enter the data, tap **Enter Pick Task** to proceed.
   - From the Pick Tasks list, tap the bin associated with the pick task you want to select.

In the Quantity column, a zero quantity indicates that items associated with the pick task have been fully picked.

- For warehouses with bins, you can stage previously completed items or partially picked items. Tap the more options ... icon, and then tap **Go to Staging**. See step 9.

  Alternatively, you can select the same pick task and pick from another bin.

- For warehouses with no bins or non-inventory items, you can proceed to Posting Item Fulfillments for Partially Picked Orders.

  Alternatively, you can process another pick task from the same order before you post the fulfillments.

4. For warehouses with bins and inventory item types, on the Enter Bin page, do one of the following:
   - In the **Scan/Enter Bin** field, scan or enter the bin. If you enter the data, tap **Enter Bin** to proceed.
   - In the **Recommended Bin** field, tap the bin you want to select.
   - Tap the **Show all bins** toggle, and then from the list of available bins, tap the bin you want to select.
5. On the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field , scan or enter the item name or number. If you enter the data, tap **Enter Item** to proceed.

     Instead of the item name, you can also scan or enter the item alias or UPC. For information about item aliases, see Creating Item Aliases.
   - In the **Item to Pick** field, tap the item name or number you want to select.
6. On the Enter Quantity page, do the following:

   Tip: If you use Tally Scanning, in the **Tally Scan Lot#/Item** field, you can scan the item bar codes until you reach the quantity you want to process. For lot or serialized items, enter or scan the lot or serial number after each item scan. If you have no remaining items to process, you are forwarded automatically to the next page.

   a. In the **Enter Quantity** field, enter the number of items you want to pick.

      Aside from the regular partial picking scenario, you can also pick a partial quantity for the following cases:
      - For lot numbers, you can enter the quantity for one lot number at a time.
      - If you use pick cartons, you can enter the quantity you want to add to each carton.

      When you enter a partial quantity, you are redirected to this page. If there are no more available items to pick, tap the more options ... icon. Then, tap **Bin Empty** for warehouses with bins or **No Stock** for warehouses with no bins. You are redirected to the Select Pick Task page. Return to step 3.
   b. (Optional) If the item is associated with multiple units, in the field next to the Enter Quantity field, you can change the unit.
   c. (Optional) If you use the Inventory Status feature and you have multiple statuses, in the **Inventory Status** field, you can change the status for the item.
   d. For lot items, in the **Scan/Enter Lot** field, scan or enter the lot number.

      Alternatively, from the list of available lots, tap the lot number you want to select. Skip step f.
   e. (Optional) For locations with no bins, to view the stock locations for the item, tap the **Show Stock Locations** toggle.
   f. Tap **Enter Quantity**.

7. For serialized items, on the Enter Serial Number, in the **Scan/Enter Serial Number** field, scan or enter the serial number. If you enter the data, tap **Enter Serial Number** to proceed.

   You can view the list of available serial numbers by tapping the **Show possible serial numbers** toggle.

   Repeat this step to enter all the serial numbers for the total quantity you want to pick. If you entered a partial quantity, you are redirected to the Enter Quantity page. Return to step 6.
8. If you have activated the Use Cartons rule for this process, on the Enter Carton page, do one of the following:

   > **Tip:** If you have configured mobile printing and the Print pick carton labels? rule, make sure you complete your printing before you proceed. See Manually Printing Labels from Your Mobile Device.

   - In the **Scan/Enter Carton** field, scan or enter the pick carton. If you enter the data, tap **Enter Carton** to proceed.
   - From the Used Cartons list, tap the pick carton you want to select.

   If you entered a partial quantity, you are redirected to the Enter Quantity page. Return to step 6.
9. On the Pick Task Complete page, you can proceed to one of the following options:
   - For warehouses with bins and inventory item types, to stage the picked items, tap **Go to Staging**. On the Enter Staging Bin page, do one of the following:

     > **Note:** If the order contains multiple pick tasks, process all the pick tasks that you want to stage in the same bin before you proceed.

     - In the **Scan/Enter Staging Bin** field, scan or enter the outbound staging bin. If you enter the data, tap **Enter Staging Bin** to proceed.
     - Tap the **Show all bins** toggle, and then from the list of bins, tap the outbound staging bin you want to select.

     The Staging Complete page appears and displays the summary of items you have processed. For bulk staging, it may take a few minutes for the job to complete. To view the job status, see the help topic Map/Reduce Script Status Page.
   - To process another pick task from the same order, tap **Next Pick Task**. You are redirected to the Select Pick Task page. Start from step 3.
   - To process another transaction of the same order type, tap **Next Order**. You are redirected to the Select Order page. Start from step 2.

Based on your fulfillment preference, NetSuite WMS automatically creates or updates fulfillment records for the fully picked or staged inventory items. For partially picked items, you must close the associated pick tasks to fulfill the orders. See Posting Item Fulfillments for Partially Picked Orders. For more information about the fulfillment preference, see Item Fulfillments of Released Orders.

Picking Items for Multiple Orders

When you process pick tasks for multiple orders, you pick similar items for multiple orders released in the same wave. For more information about pick tasks, see Assigning Pick Tasks and Releasing a Wave.

When you process orders for warehouses with no bins or non-inventory items, skip the steps for bin entry and staging.

To pick items for multiple orders:

1. On your mobile device, tap the menu icon at the top-left corner of the screen, and then tap **Main Menu**.
2. On the Main Menu page, tap **Multi-Order Picking**.
3. On the Select Wave page, do one of the following:
   - In the **Scan/Enter Wave #** field, scan or enter the wave number. If you enter the data, tap **Enter Wave #** to proceed.
   - From the Waves list, tap the wave number you want to select.
4. On the Select Pick Task page, do one of the following:
   - In the **Scan/Enter Pick Task #** field, scan or enter a pick task number. If you enter the data, tap **Enter Pick Task** to proceed.
   - From the Pick Tasks list, tap the bin associated with the pick task you want to select.

     In the Quantity column, a zero quantity indicates that items associated with the pick task have been fully picked.
   - In the **Scan/Enter Pick Task #** field, scan or enter a pick task number. If you enter the data, tap **Enter Pick Task** to proceed.
   - From the Pick Tasks list, tap the bin associated with the pick task you want to select.

     In the Quantity column, a zero quantity indicates that items associated with the pick task have been fully picked.
   - For warehouses with bins, you can stage previously completed items or partially picked items. Tap the more options ... icon, and then tap **Go to Staging**. See step 9.

     Alternatively, you can select the same pick task and pick from another bin.
   - For warehouses with no bins or non-inventory items, you can proceed to Posting Item Fulfillments for Partially Picked Orders.

     Alternatively, you can process another pick task from the same order before you post the fulfillments.
5. For warehouses with bins and inventory item types, on the Enter Bin page, do one of the following:
   - In the **Scan/Enter Bin** field, scan or enter the bin number. If you enter the data, tap **Enter Bin** to proceed.
   - In the **Recommended Bin** field, tap the picking bin you want to select.
   - Tap the **Show all bins** toggle, and then from the list of available bins, tap the picking bin you want to select.
6. On the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item name or number. If you enter the data, tap **Enter Item** to proceed.

     Instead of the item name, you can also scan or enter the item alias or UPC. For information about item aliases, see Creating Item Aliases.
   - From the Item to Pick list, tap the item name or number you want to select.
7. On the Enter Quantity page, do the following:

   > **Tip:** If you use Tally Scanning, in the **Tally Scan Lot#/Item** field, you can scan the item bar codes until you reach the quantity you want to process. For lot or serialized items, enter or scan the lot or serial number after each item scan. If you have no remaining items to process, you are forwarded automatically to the next page.

   a. In the **Enter Quantity** field, enter the number of items you want to pick.

Tip: If you want to skip the pick task for an order, you can tap the more options icon, and then tap **Skip**. The number of the next order appears in the Order field.

Aside from the regular partial picking scenario, you can also pick a partial quantity for the following cases:

- For lot numbers, you can enter the quantity for one lot number at a time.
- If you use pick cartons, you can enter the quantity you want to add to each carton.

When you enter a partial quantity, you are redirected to this page. If there are no more available items to pick, tap the more options icon. Then, tap **Bin Empty** for warehouses with bins or **No Stock** for warehouses with no bins. You are redirected to the Select Pick Task page. See step 4.

b. (Optional) If item is associated with multiple units, in the field next to the Enter Quantity field, you can change the unit.

c. (Optional) If you use the Inventory Status feature and you have multiple statuses, in the **Inventory Status** field, you can change the status for the item.

Note: For lot items, make sure that the inventory status of the lot item and lot number match.

d. For lot items, in the **Scan/Enter Lot** field, scan or enter the lot number.

Alternatively, from the list of available lots, tap the lot number. Skip step e.

e. Tap **Enter Quantity**.

Repeat steps a to d to enter the quantity for another order.

8. For serialized items, on the Enter Serial Number page, in the **Scan/Enter Serial Number** field, scan or enter the serial number. If you enter the data, tap **Enter Serial Number** to proceed.

   To view the available serial numbers, tap the **Show possible serial numbers** toggle. You can copy the serial number from the list

   Repeat this step to enter all the serial numbers for the total quantity you want to pick. If you entered a partial quantity, you are redirected to the Enter Quantity page. Return to step 7.

9. If you have activated the Use Cartons rule for this process, on the Enter Carton page, do one of the following:

   Note: You can use the same pick carton for items that belong to the same order only.

   If you have configured mobile printing and the Print pick carton labels? rule, make sure you complete your printing before you proceed. See Manually Printing Labels from Your Mobile Device.

   - In the **Scan/Enter Carton** field, scan or enter the pick carton. If you enter the data, tap **Enter Carton** to proceed.
   - From the Used Cartons list, tap the pick carton you want to select.

   If you entered a partial quantity, you are redirected to the Enter Quantity page. Return step 7.

10. On the Pick Task Complete page, you can proceed to one of the following options:

    - For warehouses with bins and inventory item types, to stage the picked items, tap **Go to Staging**. On the Enter Staging Bin page, do one of the following:

> **Note:** If the order contains multiple pick tasks, process all the pick tasks that you want to stage in the same bin before you proceed.

- In the **Scan/Enter Staging Bin** field, scan or enter the outbound staging bin. If you enter the data, tap **Enter Staging Bin** to proceed.
- Tap the **Show all bins** toggle, and then from the list of bins, tap the outbound staging bin you want to select.

The Staging Complete page appears and displays the summary of orders you have processed. If you have other pick tasks or orders to process, you can proceed to the other options.

- To process another pick task from the same wave, tap **Next Pick Task**. You are redirected to the Select Pick Task page. Start from step 4.
- To process another multi-order wave transaction, tap **Next Wave**. You are redirected to the Select Wave page. Start from step 3.

Based on your fulfillment preference, NetSuite WMS automatically creates or updates fulfillment records for the fully picked or staged inventory items. For partially picked items, you must close the associated pick tasks to fulfill the orders. See Posting Item Fulfillments for Partially Picked Orders. For more information about the fulfillment preference, see Item Fulfillments of Released Orders.

Performing Bulk Order Picking

Bulk order picking enables you to pick the entire quantity of a single item from consolidated orders released in a wave transaction. On your mobile device, you can pick and process them all at the same time. NetSuite WMS automatically distributes the appropriate quantities across the orders in the wave. For more information, see Creating Wave Transactions or Assigning Pick Tasks and Releasing a Wave.

Serialized items that you include in a wave for bulk order picking follow the multi-order picking flow on a mobile device. If you have activated the Use cartons for multi-order picking? rule for your warehouse, you can add pick cartons as you process serialized items. For more information about rules that affect order picking, see Picking Orders.

When you process orders for warehouses with no bins or non-inventory items, skip the steps for bin entry and staging.

To perform bulk order picking:

1. From the Main Menu, tap **Picking**.
2. On the Select Picking Type page, tap **Multi-Order Picking**.
3. On the Select Wave page, do one of the following:
   - In the **Scan/Enter Wave #** field, scan or enter the wave transaction number. If you enter the data, tap **Enter Wave #** to proceed.
   - From the Waves list, tap the wave number you want to select.
4. On the Select Pick Task page, do one of the following:
   - In the **Scan/Enter Pick Task #** field, scan or enter the pick task number. If you enter the data, tap **Enter Pick Task**.
   - From the Pick Tasks list, tap the item associated with the pick task you want to process.

     In the Quantity column, a zero quantity indicates that items associated with the pick task have been fully picked.
   - For warehouses with bins, you can stage previously completed items or partially picked items. Tap the more options ... icon, and then tap **Go to Staging**. See step 9.

Alternatively, you can select the same pick task and pick from another bin.

- For warehouses with no bins or non-inventory items, you can proceed to Posting Item Fulfillments for Partially Picked Orders.

  Alternatively, you can process another pick task from the same order before you post the fulfillments.

5. For warehouses with bins and inventory item types, on the Enter Bin page, do one of the following:
   - In the **Scan/Enter Bin** field, scan or enter the bin number. If you enter the data, tap **Enter Bin** to proceed.
   - In the **Recommended Bin** field, tap the picking bin you want to select.
   - Tap the **Show all bins** toggle, and then from the list of available bins, tap the picking bin you want to select.
6. On the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item name, number, alias, or UPC. If you enter the data, tap **Enter Item** to proceed.
   - In the **Item to Pick** field, tap the item you want to select.
7. On the Enter Quantity page, do the following:

   > **Tip:** If you use Tally Scanning, in the **Tally Scan Lot#/Item** field, you can scan the item bar codes until you reach the quantity you want to pick. For lot or serialized items, enter or scan the lot or serial number after each item scan. If you have no remaining items to process, you are forwarded automatically to the next page.

   a. In the **Enter Quantity** field, enter the number of items you want to pick.

      > **Tip:** If you want to skip the pick task for an order, you can tap the more options icon, and then tap **Skip**. The number of the next order appears in the Order field.

      Aside from the regular partial picking scenario, you can also pick a partial quantity for the following cases:

      - For lot numbers, you can enter the quantity for one lot number at a time.
      - For serialized items, if you use pick cartons, you can enter the quantity you want to add to each carton.

      When you enter a partial quantity, you are redirected to this page. If there are no more available items to pick, tap the more options icon. Then, tap **Bin Empty** for warehouses with bins or **No Stock** for warehouses with no bins. You are redirected to the Select Pick Task page. See step 4.

   b. (Optional) If item is associated with multiple units, in the field next to the Enter Quantity field, you can change the unit.

   c. (Optional) If you use the Inventory Status feature and you have multiple statuses, in the **Inventory Status** field, you can change the status for the item.

   d. For lot items, in the **Scan/Enter Lot** field, scan or enter the lot number.

      Alternatively, from the list of available lots, tap the lot number. Skip step e.

   e. Tap **Enter Quantity**.

   Repeat steps a to d to enter the quantity for another order.
8. For serialized items, on the Enter Serial Numbers page, in the **Scan/Enter Serial Number** field, scan or enter the serial number. If you enter the data, tap **Enter Serial Number** to proceed.

You can view the list of available serial numbers by tapping the **Show possible serial numbers** toggle.

Repeat this step to enter all the serial numbers for the total quantity you want to pick. If you entered a partial quantity or have another order to process, you are redirected to the Enter Quantity page. Return to step 7.

9. For serialized items, if you have activated the Use Cartons rule for this process, do one of the following:

> **Note:** You can use the same pick carton for items that belong to the same order only.
>
> If you have configured mobile printing and the Print pick carton labels? rule, make sure you complete your printing before you proceed. See Manually Printing Labels from Your Mobile Device.

- In the **Scan/Enter Carton** field, scan or enter the pick carton. If you enter the data, tap **Enter Carton** to proceed.
- From the Used Cartons list, tap the pick carton you want to select.

If you entered a partial quantity, you are redirected to the Enter Quantity page. Return to step 7.

10. On the Pick Task Complete page, you can proceed to one of the following options:

- For warehouses with bins and inventory item types, to stage the picked items, tap **Go to Staging**. On the Enter Staging Bin page, do one of the following:

  > **Note:** If the order contains multiple pick tasks, process all the pick tasks that you want to stage in the same bin before you proceed.

  - In the **Scan/Enter Staging Bin** field, scan or enter the outbound staging bin. If you enter the data, tap **Enter Staging Bin** to proceed.
  - Tap the **Show all bins** toggle, and then from the list of bins, tap the outbound staging bin you want to select.

  The Staging Complete page appears and displays the summary of orders you have completely processed. You can view the quantity of items that have been distributed per order.
- To process another pick task from the same wave, tap **Next Pick Task**. You are redirected to the Select Pick Task page. Start from step 4.
- To process another multi-order wave transaction, tap **Next Wave**. You are redirected to the Select Wave page. Start from step 3.

Based on your fulfillment preference, NetSuite WMS automatically creates or updates fulfillment records for the fully picked or staged inventory items. For partially picked items, you must close the associated pick tasks to fulfill the orders. See Posting Item Fulfillments for Partially Picked Orders. For more information about the fulfillment preference, see Item Fulfillments of Released Orders.

Preventing the Picking of Expired Items

You can set whether you want to show items from expired lots as available for picking. By default, NetSuite WMS allows the picking of expired items. If you do not want expired items to appear in the available inventory for picking, you can edit the Allow picking of expired items system rule.

To prevent the picking of expired items:

1. Log in to your NetSuite WMS account using the Warehouse role.

2. Go to Setup > Warehouse > System Rules.
3. Do one of the following:
   - To prevent the picking of expired items for all warehouse locations, click **Edit** next to **Allow picking of expired items?**.
   - To prevent the picking of expired items to accommodate a business exception that applies to one location only, complete the following steps:
     1. Click **View** next to **Allow picking of expired items?**.
     2. In the **Actions** menu, click **Make Copy**.
     3. In the **Name** field, enter **Allow picking of expired items?**.
     4. In the **Location** field, select the appropriate warehouse location or warehouse sublocation.
4. In the **Rule Value** field, enter **N**.
5. Check the **Active** box.
6. Click **Save**.

For more information, see System Rules for NetSuite WMS.

Picking Orders from a Zone

If you activate the following Zone Picking rules for locations with bins, you can pick items from zones for orders released in waves:

- **Enable Zone Picking for single orders** - Different pickers can process one or more pick tasks associated with the same order in a wave. See Zone Picking for Single Orders.
- **Enable Zone Picking for multiple orders** – Multiple pickers can process orders from the same wave. See Zone Picking for Multiple Orders.

You can stage the items picked from different zones in the same bin location. For more information, see System Rules for NetSuite WMS.

On the mobile app, the Select Zone page appears to display the zones from the same warehouse. You can select one or more zones that contain the items you want to pick. If you select the All Unassigned Zones option, you can process non-inventory items.

Zone Picking for Single Orders

You can activate the Zone Picking system rule to process waves for the Single Order picking type. You can enable the Always Merge Items During Staging setting in the rule. It requires that you stage all the picked items for an order in the same bin. Otherwise, staging of picked items in the same bin remains optional.

To pick single orders from a zone:

1. Access the order selection page by doing the following:
   a. On your mobile device, tap the menu icon at the left corner of the header, and then tap **Main Menu**.
   b. On the Main Menu page, tap **Picking**.
   c. On the Picking page, tap **Single Order Picking**.
   d. On the Select Picking Mode page, tap **Released Orders**. Then, on the Select Order Type page, tap either **Sales Order** or **Transfer Order**.
2. On the Select Zone page, scan or enter a zone in the field, or tap the zones from the list. Then, tap **Enter Zone** to proceed.

If you choose the **All Unassigned Zones** option, you can pick items from bins not associated with zones, including non-inventory items.

3. On the Select Order page, scan or enter an order number in the field, or tap an order from the list. If you enter the data, tap **Enter Order #** to proceed.

   If you are redirected to this page and you want to change the zone, tap the Back button to return to the Select Zone page.

4. On the Select Pick Task page, scan or enter a pick task in the field, or tap a pick task from the list. If you enter the data, tap **Enter Pick Task** to proceed.

   If you want to view the fully picked tasks from the same released order, tap the toggle.

5. On the Enter Bin page, do one of the following:
   - In the **Scan/Enter Bin** field, scan or enter the bin from which you want to pick the items. If you enter the data, tap **Enter Bin** to proceed.
   - In the **Recommended Bin** field, tap the bin.
   - To select from a list of bins, tap the **Show all bins** toggle, and then tap the bin.

     Tip: To display the Zone column, tap the table icon. On the popup window, from the Visible Columns list, tap **Zone**, and then tap **Done**.

     The list displays all the bins that contain the item within the warehouse. You can select a bin that does not belong to the same zone or one not assigned to any zone.

6. On the Enter Item page, do one of the following:
   - In the **Scan/Enter Item** field, scan or enter the item you want to pick. If you enter the data, tap **Enter Item** to proceed.

     You can scan or enter the item name, number, alias or UPC.
   - In the **Item to Pick** field, tap the item name.

7. On the Enter Quantity page, depending on the features and rules you use, enter or select values in the following fields:
   a. **Inventory Status** - If you use the Inventory Status feature, you can select the status of an item associated with different statuses.

      Tip: To display the Status column on the Available Quantity table, tap the table icon. From the Visible Columns list, tap **Status**. Then, tap **Done**.

   b. To enter the quantity, do one of the following:
      - **Enter Quantity** - Enter the picked quantity for the item. Otherwise, if you have no available quantity to pick, proceed to step c.

        Optionally, beside the field, you can change the unit if the item is associated with multiple units. By default, this field displays the transaction unit. Even if you change the unit, the value in the Quantity Remaining field adjusts automatically based on the default unit.
      - **Scan/Enter Item**, **Scan/Enter Lot, Tally Scan Serial** - If you activate the Tally Scanning rule, before you scan the item bar code, make sure you leave the Enter Quantity field blank and select the correct unit. You cannot change the unit after you scan the first item bar code. You can also verify that the correct inventory status is selected, as shown in step 7.a.

        For lot or serialized items, you can scan an item bar code that contains the lot or serial number, respectively. Otherwise, you can select the number from the list. For serialized items, tap the toggle to display the list. You can skip step 8.

        The values in the Enter Quantity and Remaining Quantity fields adjust automatically.

Repeat this step to scan each item. After you scan the full quantity, the next page appears automatically. You can skip step 7.c.

c. To save the quantity or proceed, do one of the following:

- After you enter the full or partial quantity, tap **Enter Quantity**.

  If you enter a partial quantity, this page appears again. You can enter the quantity for another lot number or inventory status. You can also change the unit.

- If you have no available or remaining inventory items to pick, tap **Bin Empty**. For non-inventory items, tap **No Stock**.

If you have another pick task to process from the same released order or open tasks, you are redirected to the Select Pick Task page. This page also appears if you have open tasks with quantity not picked. Repeat from step 4.

8. For serialized items, on the Enter Serial Number page, scan or enter the serial number in the field. If you enter the data, tap **Enter Serial Number** to proceed.

   Repeat this step to enter all the serial numbers for the total picked quantity. If you entered a partial quantity, you are redirected to the Enter Quantity page. You can enter the quantity for another inventory status. Repeat from step 7.

9. If you activate the Use Cartons rule for single orders, on the Enter Carton page, scan or enter a pick carton in the field, or tap a pick carton from the list. If you enter the data, tap **Enter Carton** to proceed.

   > **Note:** If you activate the Print pick carton labels? rule and Mobile Printing, make sure you complete your printing before you proceed.

10. On the Pick Task Complete page, do one of the following:

    > **Tip:** If you have no remaining items to pick, this page does not appear and you are redirected to the Enter Staging Bin page. Proceed to step 11.

    - To start staging the picked items, tap **Go to Staging**.
    - To process another pick task, tap **Next Pick Task**. Repeat from step 3.

11. On the Enter Staging Bin page, do one of the following:

    > **Tip:** You can scan, enter, or select the staging bin that already contains staged items from the same released order, even those picked from different zones. From the list of bins, this staging bin appears with an asterisk. If you enable the Always Merge Items During Staging setting in the Zone Picking rule, you must select this bin.

    - In the **Scan/Enter Staging Bin** field, scan or enter the staging bin. If you enter the data, tap **Enter Staging Bin** to proceed.
    - To select from a list of staging bins within the warehouse, tap the **Show all bins** toggle. Then, tap the staging bin.

    The confirmation page appears with the staging details.

You can view the updated orders, waves, and any generated fulfillment records from the NetSuite UI. You can also process or close partially picked orders. For more information, see Picking Orders.

Zone Picking for Multiple Orders

You can activate the Zone Picking rule for waves with the Multiple Orders picking type and enable the following rule settings: Stage by Order and Always Merge Items During Staging. Even if you pick the items from different zones, you can stage them per order. During staging, the Select Order page appears so that you can choose one or more orders. You also have the option to stage them in the same bin. However, if you enable the Always Merge Items During Staging setting, staging in the same bin becomes mandatory.

To pick multiple orders from a zone:

1. Access the order selection page by doing the following:
    a. On your mobile device, tap the menu icon at the left corner of the header, and then tap **Main Menu**.
    b. On the Main Menu page, tap **Picking**.
    c. On the Picking page, tap **Multi-Order Picking**.
2. On the Select Zone page, scan or enter a zone in the field, or tap the zones from the list. Then, tap **Enter Zone** to proceed.

   If you choose the **All Unassigned Zones** option, you can pick items from bins not associated with zones, including non-inventory items.
3. On the Select Wave page, scan or enter a wave number, or tap a wave from the list. If you enter the data, tap **Enter Wave #** to proceed.

   If you are redirected to this page and you want to change the zone, tap the Back button to return to the Select Zone page.
4. On the Select Pick Task page, do one of the following:
    - Scan or enter a pick task in the field, or tap a pick task from the list. If you enter the data, tap **Enter Pick Task** to proceed.
    - To stage items that have been picked already, tap **Go to Staging**. Alternatively, you can select from the list of fully picked tasks by tapping the toggle.

      The Enter Staging Bin page appears. Proceed to step 12.
5. On the Enter Bin page, do one of the following:
    - In the **Scan/Enter Bin** field, scan or enter the bin from which you want to pick the items. If you enter the data, tap **Enter Bin** to proceed.
    - In the **Recommended Bin** field, tap the bin.
    - To select from a list of bins, tap the **Show all bins** toggle, and then tap the bin.

      Tip: To display the Zone column, tap the table icon. From the Visible Columns list, tap **Zone**. Then, tap **Done**.

      The list displays all the bins that contain the item within the warehouse. You can select a bin that does not belong to the same zone or one not assigned to any zone.
6. On the Enter Item page, do one of the following:
    - In the **Scan/Enter Item** field, scan or enter the item you want to pick. If you enter the data, tap **Enter Item** to proceed.

      You can scan or enter the item name, number, alias or UPC.
    - In the **Item to Pick** field, tap the item.
7. On the Enter Quantity page, depending on the features and rules you use, enter or select values in the following fields:
    a. **Inventory Status** - If you use the Inventory Status feature, you can select a status for items associated with different statuses.

> **Tip:** To display the Status column on the Available Quantity table, tap the table icon. From the Visible Columns list, tap **Status**. Then, tap **Done**.

b. To enter the quantity, do one of the following:

- **Enter Quantity** - Enter the picked quantity for the item. Otherwise, if you have no available quantity to pick, proceed to step c.

  Optionally, beside the field, you can change the unit if the item is associated with multiple units. By default, this field displays the transaction unit. Even if you change the unit, the value in the Quantity Remaining field adjusts automatically based on the default unit.

- **Scan/Enter Item**, **Scan/Enter Lot**, or **Tally Scan Serial** - If you enable the Tally Scanning rule, before you scan the item bar code, make sure you leave the Enter Quantity field blank and select the correct unit. You cannot change the unit after you scan the first item bar code. You can also verify that the correct inventory status is selected, as shown in step 7.a.

  For lot or serialized items, you can scan an item bar code that contains the lot or serial number, respectively. Otherwise, you can select the number from the list. For serialized items, you can skip step 8.

  The values in the Enter Quantity and Remaining Quantity fields adjust automatically.

  Repeat this step to scan each item. After you scan the full quantity, the next page appears automatically. You can skip step 7.d.

c. To save the quantity or proceed, do one of the following:

- After you enter the full or partial quantity, tap **Enter Quantity**.

  If you enter a partial quantity, this page appears again. You can enter the quantity for another lot number or inventory status. You can also change the unit.

- If you want to skip picking the item for an order and switch to the next order, tap **Skip**. The number or ID of the next order for the same item appears in the Order field. You can repeat the steps to enter the quantity for the next order.

- If you have no available or remaining inventory items to pick, tap **Bin Empty**. For non-inventory items, tap **No Stock**.

Repeat this step to enter the item quantity for another order. If you have another pick task to process, you are redirected to the Select Pick Task page. This page also appears if you have open tasks with quantity not picked. Repeat from step 4.

8. For serialized items, on the Enter Serial Numbers page, in the **Scan/Enter Serial Number** field, scan or enter a serial number. If you enter the data, tap **Enter Serial Number** to proceed.

   To display the list of available serial numbers, tap the toggle.

   Repeat this step to enter all the serial numbers for the total picked quantity. If you entered a partial quantity, you are redirected to the Enter Quantity page. You can enter the quantity for another inventory status. Repeat from step 7.

9. If you activate the Use Cartons rule for multiple orders, on the Enter Carton page, do one of the following:

> **Note:** You can use the same pick carton for items that belong to the same order only.
>
> If you activate the Print pick carton labels? rule and Mobile Printing, make sure you complete your printing before you proceed.

- In the **Scan/Enter Carton** field, scan or enter the pick carton. If you enter the data, tap **Enter Carton** to proceed.
- From the Used Cartons list, tap the pick carton you want to select.

If you entered a partial quantity, you are redirected to the Enter Quantity page. Repeat from step 7. If you have no other pick tasks to process, you are redirected to the Select Order page or Enter Staging Bin page. Proceed to step 11 or 12, respectively.

10. On the Pick Task Complete page, you can do one of the following:

> **Tip:** If you have no remaining items to pick, this page does not appear and you are redirected to the Enter Staging Bin page. Proceed to step 11.

- To process another pick task from the same wave, tap **Next Pick Task**. Repeat from step 4.
- To stage your picked items, tap **Go to Staging**.

11. If you enable the Stage by Order setting in the Zone Picking rule, on the Select Order page, do one of the following:
    - In the **Scan/Enter Order** field, scan or enter the number of the order you want to stage. If you enter the data, tap **Enter Order** to proceed.
    - From the Select Orders list, tap the box next to the orders you want to stage.
12. On the Enter Staging Bin page, do one of the following:

> **Tip:** You can scan, enter, or select the staging bin that already contains staged items from the same released order, even those picked from different zones. From the list of bins, this staging bin appears with an asterisk. If you enable the Always Merge Items During Staging setting in the Zone Picking rule, you must select this bin.

- In the **Scan/Enter Staging Bin** field, scan or enter the bin. If you enter the data, tap **Enter Staging Bin** to proceed.
- To select from a list of staging bins, tap the **Show all bins** toggle.

If another order is available for staging, the Select Orders page appears. Repeat from step 11. Otherwise, the Staging Complete page appears with the staging details.

You can view the updated orders, waves, and any generated fulfillment records from the NetSuite UI. You can also process or close partially picked orders. For more information, see Picking Orders.

Pick Task Reversal

When you reverse a pick task, you delete its associated fulfillment record. If the fulfillment record has lines associated with other orders, you delete those for the reversed pick task only. For locations with bins, you return item quantities from the staging bin back to the bin from which they were picked. You can release order lines for reversed pick tasks in another wave.

You can reverse the entire quantity on a pick task's line item, but not partial quantities. For orders of kit/package items, you must reverse all components at the same time. Pick task reversal for non-inventory items is not supported.

Using the NetSuite user interface or mobile device, you can reverse pick tasks with fulfillments that have not yet been marked Shipped. You cannot directly reverse pick tasks for pending billing or billed orders. Before you can reverse them, you must delete the fulfillment records first. For more information, see the help topic Voiding, Deleting, or Closing Transactions.

To reverse pick tasks, see the following topics:

- Reversing Pick Tasks Using the NetSuite UI
- Reversing Pick Tasks Through a Mobile Device

Reversing Pick Tasks Using the NetSuite UI

On the NetSuite UI, you can reverse completed pick tasks only. For other conditions that apply to pick task reversals, see Pick Task Reversal.

To reverse pick tasks using the NetSuite UI:

1. Using the Warehouse role, go to Shipping > Picking > Reverse Picks.

   > **Important:** Do not use the Pick Reversal menu option available from the previous version of NetSuite WMS.

2. On the Reverse Picks page, in the **Location** field, select the warehouse location where the pick tasks have been released.
3. Search for the pick tasks you want to reverse by doing one of the following:
   - To search by wave transaction, in the **Wave #** field, enter the number of the wave transaction.
   - To search by order transaction, in the **Transaction Type** field, select one of the following transaction types: **Sales Order** or **Transfer Order**. Then, in the **Transaction #** field, enter the number of the order transaction.
4. Click **Display**.
5. On the **Line Items** subtab, in the **Reverse Pick** column, check the box next to each pick task line you want to reverse.
6. Click **Submit**.

Reversing Pick Tasks Through a Mobile Device

Through a mobile device, you can reverse a pick task that you have completed or started to pick. For other conditions that apply to pick task reversals, see Pick Task Reversal.

To reverse pick tasks through a mobile device:

1. From the Main Menu, tap **Picking**.
2. On the Picking page, tap **Reverse Picks**.
3. On the Select Order Type page, tap one of the following order types: **Sales Order** or **Transfer Order**.
4. On the Enter Wave or Order page, in the **Scan/Enter Wave or Order #** field, scan or enter the wave or order number. If you enter the data, tap **Enter Wave/Order #** to proceed.
5. On the Select Pick Task Line page, from the Line Items list, tap the order associated with the pick task you want to process.
6. On the Pick Task Line Details page, you can review the item and picking details for the task.

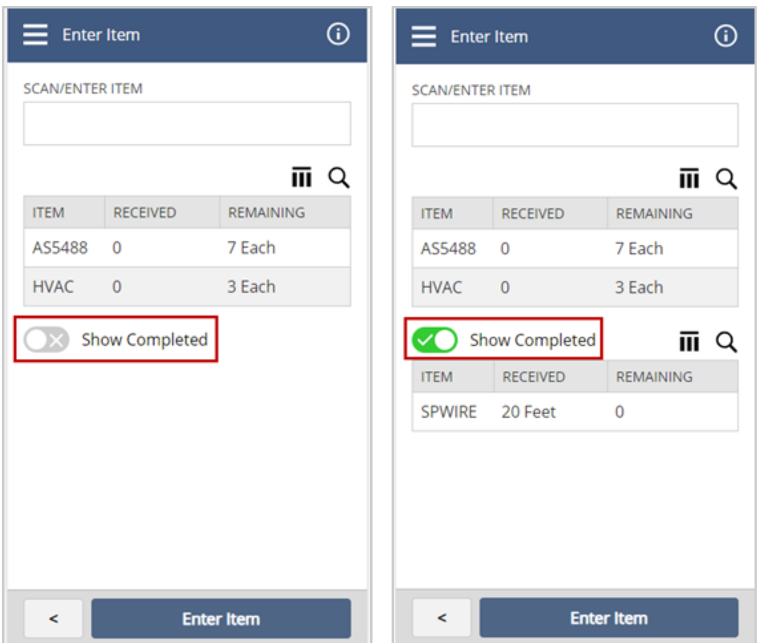
For kit items, a message appears to inform you that all pick tasks for other kit components are also reversed.

7. Tap **Reverse**.

You can view updates to the wave and order transactions associated with the reversed pick tasks.

Showing or Hiding Completed Picks on Mobile Devices

You can use the Show Completed switch on mobile device picking screens to show and hide completed picks from the displayed list. Tap the switch to the on or off position to show or hide completed picks from the list.



Packing Orders

After you pick items for released orders, you can pack them for shipping. Packing orders enables you to enter carton details. It also updates the status and carton details of associated fulfillment records. For more information, see Manually Packing Orders and Printing Packing Lists. To view the list of supported item types for packing released orders, see Supported Transactions and Item Types.

You can inactivate the Manually pack orders? system rule to automatically set fulfillment records for the picked orders to Packed. See System Rules for NetSuite WMS.

You can define a format to autogenerate SSCC-18 bar codes and print shipping labels with this code. If you do not manually pack orders, NetSuite generates the code after you pick and stage orders through your mobile device. Otherwise, it generates the code after you manually pack orders through the NetSuite UI. See Defining a UCC Code Format.

If you use the Pack Station SuiteApp, you can complete your packing tasks through a kiosk device. You can pack your picked items into cartons and transfer them onto a pallet. When you pack cartons, you can capture weights from a weighing scale. For more information, see the help topic Pack Station.

Manually Packing Orders and Printing Packing Lists

You can manually pack orders that are released in wave transactions and that have fulfillment records in Picked status. When you pack orders, you provide carton details and select one or more items to include in the carton. NetSuite WMS sets the associated order transaction and fulfillment record to Packed status. For more information about released orders, see Releasing Orders to the Warehouse or Item Fulfillments of Released Orders.

Item and carton details for packed orders appear on the packing list, which you can print immediately after you process each manually packed order. The packing list also displays shipping details sourced from sales or transfer order transactions. If you want to print custom packing lists, you must activate and configure the Use custom packing lists? system rule before you manually process orders for packing. See System Rules for NetSuite WMS.

For non-inventory for sale and for resale item types, you can pack only the full quantity on the fulfillment record and not any partial quantities. For more information about supported item types for packing orders released in waves, see Supported Transactions and Item Types.

You have the option to automatically pack orders by inactivating the Manually pack orders? system rule. If you have set the Default Item Fulfillment Stage preference, note how your Manually pack orders? rule setting affects the status of new fulfillments for released orders:

- If you set the preference to Picked and do not activate the system rule, NetSuite WMS automatically sets new item fulfillments to Packed status.
- If you set the preference to Packed or Shipped and activate the system rule, NetSuite WMS automatically sets new item fulfillments to Picked status. With new fulfillments in this status, you can manually pack the released orders.

For more information about this preference, see the help topic Shipping Integration with Pick, Pack, and Ship.

To manually pack orders and print packing lists:

1. Using the Warehouse role, go to Shipping > Packing > Pack Orders.

   > **Important:** You should not use the Packing for Single Order or Packing for Multi Order menu options.

2. On the Pack Orders page, search for the released orders you want to pack using the following filters:
   a. In the Primary Information section, select values in the following fields:
      - In the **Location** field, select a warehouse location.
      - In the **Transaction Type** field, select the type of transaction to which the orders belong or the type indicated on the wave transaction.

   b. (Optional) In the Transaction Details section, you can set values in the fields to apply more filters and refine your search.
3. Click **Display**.

   The carton fields and list of orders appear on the page.
4. In the Carton Details section, enter values in the following fields:
   - In the **Carton** field, enter a label or number, in any format, to identify the new pack carton.

     > **Note:** On the packing slip, this carton detail is shown as the container number.

   - (Optional) In the **Size** field, enter the dimensions of the pack carton.

- In the **Weight** field, enter the numeric value of the weight of the package, without the unit.

5. On the **Packing** subtab, do the following for each line item you want to process:
   a. Check the **Confirm** box next to each item that you want to include in the pack carton.
   b. In the **Quantity** column, enter the number of items you want to pack.
6. Click **Submit**.

   A confirmation message appears on the page.
7. To print a packing list, click **Print Packing List**.

   You can view the details on a packing list before you print it.

Shipping Orders

After you have picked and packed items, you can ship them using either the NetSuite WMS Shipping Integration or the Quick Ship feature. Both shipping methods use the WMS Ship Manifest record to associate a tracking number with your orders' cartons and mark the orders as shipped in NetSuite.

See the following topics:

- WMS Ship Manifest Records
- NetSuite WMS Shipping Integration
- Manually Shipping Orders
- Manually Shipping Orders in Pack Cartons or Pallets
- Confirming Customer Shipments

WMS Ship Manifest Records

WMS Ship Manifest records are intermediary data records that pass shipping information to and from NetSuite and to and from the NetSuite WMS Shipping Integration.

When you post an item fulfillment record for an item, order, or carton, the system creates a WMS Ship Manifest record at the same time. It populates the record with information from the sales order and picking and packing processes, such as the order number, carton details, recipient details, and shipping instructions.

When you ship items and cartons, the system updates the associated ship manifest record with the shipping tracking number. It marks an item fulfillment as shipped when its associated ship manifest record has a shipping tracking number.

For more information, see Posting Item Fulfillments for Partially Picked Orders.

NetSuite WMS Shipping Integration

The NetSuite WMS Shipping Integration provides a connection between NetSuite and your parcel carrier shipping software (for example, FedEx Ship Manager or UPS WorldShip). This connection enables you to automate some of your outbound processing tasks to streamline the shipping process.

The NetSuite WMS Shipping Integration uses the NSWMS Print Driver application to automatically:

- Pull shipping data from WMS Ship Manifest records to push it to your carrier shipping software.
- Generate shipping labels for each carton packed using NetSuite WMS.
- Print shipping labels to printers in your warehouse.
- Pull tracking number information from your carrier shipping software and push it to WMS Ship Manifest records.

Install the NSWMS Print Driver application on the same computer in your warehouse's shipping station you use to run your parcel carrier's shipping software. As you pack items in the warehouse, the application runs a scheduled task to find all orders that are ready to be shipped. Using the information stored in the WMS Ship Manifest record, it creates shipping labels and prints them at the printer you configure in the application.

For more information on installation and configuration of the NSWMS Print Driver application, see NetSuite WMS Shipping Integration Setup.

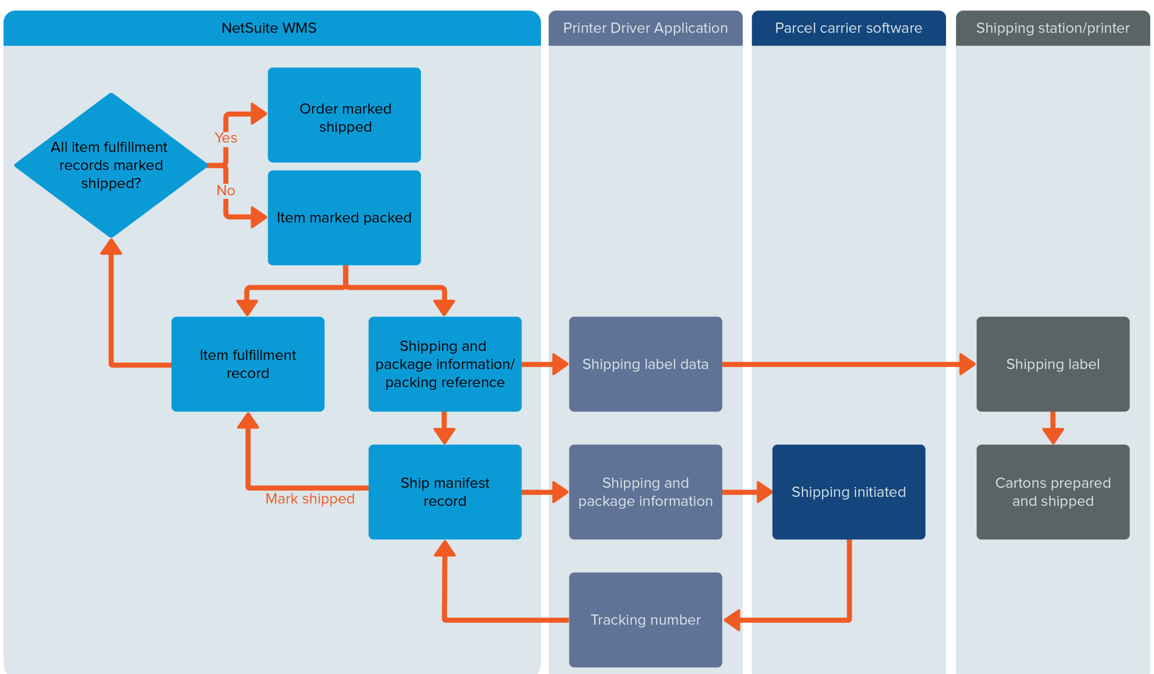
Shipping Orders Using the NetSuite WMS Shipping Integration

The NetSuite Printer Driver application runs a scheduled script at an interval you define during its configuration. The script identifies all orders that are packed and ready for shipping. To do this, it looks for orders with ship manifest records that have a packing reference, but no shipping tracking number.

The NetSuite Print Driver application then pulls the orders' shipping data from their associated ship manifest records and pushes it to the parcel carrier software. The system initiates the shipping process with the parcel carrier, generates and prints ship labels, and pushes a tracking number to the ship manifest record.

When a ship manifest record has a shipping tracking number, the system marks its associated item fulfillment record as shipped. When all of an order's associated item fulfillment records are marked as shipped, the order is considered fulfilled and moves to the Pending Billing status.

NetSuite WMS Shipping Integration Workflow Chart



Manually Shipping Orders

The Quick Ship feature enables you to manually mark items as shipped. You might use this feature for orders that do not need to go through a formal shipping process, such as customer pick-ups or internal sales orders.

> **Important:** To use the quick ship feature, the shipping method set on the order must be associated with a carrier service level record that has the Allow Quick Ship box checked. Creating Carrier Service Levels.

WMS Mobile Quick Ship Orders

To manually ship an order:

1. On your mobile device, on the Warehouse Location page, select your warehouse location.
2. On the Main Menu page, tap **Picking**.
3. On the Picking page, tap **Quick Ship**.
4. On the Select Order Type page, tap the type of order you are shipping: **Sales Order** or **Transfer Order**.
5. On the Select Order page, in the **Scan/Enter Order Number** field, scan or enter the order transaction number, and then tap **Enter Order #.**

   > **Tip:** You can also select an order by tapping the **Order #** link from the Sales or Transfer Order list. This list displays all the transactions for orders that you have completely picked and packed.

6. On the Enter Carton page, in the **Scan/Enter Carton Number** field, scan or enter the number of the carton, and then tap **Enter Carton**.

   > **Tip:** You can also select a carton by tapping the **Carton #** link from the Cartons list.

   If you manually packed the item, this field is populated with the carton number you have entered during the manual packing.
7. On the Enter Tracking Number page, In the **Scan/Enter Tracking Number** field, scan or enter the shipping tracking number for the order, and then tap **Enter Tracking #**.

   If you have not marked all of the cartons in the order as shipped, the Quick Ship - Carton # page appears. You can repeat the applicable steps to ship additional cartons from the same order.

   When you process all the cartons in the order, the Quick Ship - Order # page appears. You can process the cartons from a different order.

   After you complete all the orders, the Quick Ship Complete page appears with the confirmation message and order details.

Manually Shipping Orders in Pack Cartons or Pallets

If you use the Pack Station SuiteApp, you can process pack cartons on pallets for shipping. You can also process one pack carton at a time. On your mobile device, be sure to switch to the NetSuite WMS mobile app to process the packed orders for shipping.

> **Important:** To use the quick ship capability, the shipping method set on the order must be associated with a carrier service level record that has the Allow Quick Ship box checked. In the same record, make sure you enter the correct carrier ID and service level. See Creating Carrier Service Levels.

For more information, see the following topics:

- Manually Shipping Orders

- Pack Station

To manually ship orders in pack cartons or pallets:

1. On the Main Menu page, tap **Picking**.
2. On the Picking page, tap **Quick Ship**.
3. On the Select Order Type page, tap the type of order you are shipping: **Sales Order** or **Transfer Order**.
4. On the Select Order page, do one of the following:
   - In the **Scan/Enter Order #, Carton #, or Pallet #** field, scan or enter the order, pack carton, or pallet number you want to ship. If you enter the data, tap **Enter** to proceed.
   - To view and select from the Pallets list, tap **Select Pallet From List**.
   - To view and select from the Sales Orders list, tap **Select SO From List**.

   If you enter a pack carton, skip step 5.
5. On the Enter Carton page, do one of the following:
   - In the **Scan/Enter Carton Number** field, scan or enter the pack carton number. If you enter the data, tap **Enter Carton** to proceed.
   - From the Cartons list, tap the carton number you want to select.
   - If you have multiple pack cartons in the Cartons list and you want to ship all of them, tap **Ship All**.
6. On the Enter Tracking Number page, in the **Scan/Enter Tracking Number** field, scan or enter the tracking number. If you enter the data, tap **Enter Tracking #** to proceed.

   If you have more cartons to process from the same order or pallet, you are redirected to the Enter Carton page. Repeat steps 5 and 6.

   When you have no remaining cartons to process, the Quick Ship Complete page appears with the confirmation message and order details.

You can view the updated details on the order transaction, fulfillment records, and WMS Ship Manifest.

Confirming Customer Shipments

After you ship items, you can send Advance Shipping Notices (ASNs) to customers using Electronic Data Interchange (EDI). To send ASNs using EDI, you have to configure NetSuite WMS for use with EDI and work with a NetSuite EDI partner.

For more information, see Electronic Data Interchange (EDI) Integration.

Sending Advance Shipping Notices (ASNs)

An advance shipping notice is a document similar to a packing slip you send to customers to confirm that you shipped their order. It is sent from NetSuite WMS to a NetSuite EDI partner to the customer.

If you have enabled the EDI integration to send ASNs, a scheduled script runs every 15 minutes to find all shipped orders for which the customer has requested an ASN. For each identified order, NetSuite WMS creates an ASNC Parent record with the order number and one Stage Outbound ASNC record for each item in the order with the required shipping data. This data is then read by the NetSuite EDI partner, who converts the data into an EDI document and sends the ASN to the customer.

Label Printing and Reprinting

If you enable the Mobile Printing capability, you can print labels from your mobile device. You can print item or pallet labels from the Enter Quantity page of a mobile process. To view the list of supported processes, see Mobile Printing for NetSuite WMS.

If you use pick cartons for the order picking processes, you can print pick carton labels from the Enter Carton page. For setup instructions, see System Rules for NetSuite WMS.

The default optional printing setting displays the Print button on a mobile page. You have the option to skip printing. If you change the default setting for a standard process, the printing flow may vary.

For example, you configure Automatic printing for the standard purchase order receiving process. After you enter the received quantity on your mobile device, label printing starts automatically.

For more information about printing settings, see the help topic Configuring Print Action Settings for Standard Mobile Processes.

For printing instructions, see the following topics:

- Manually Printing Labels from Your Mobile Device
- Reprinting Labels

Manually Printing Labels from Your Mobile Device

Follow the instructions in this topic to print from mobile processes that you have not set up to Automatic printing.

To manually print labels from your mobile device:

1. Follow the steps in one of the following processes until you reach the mobile page on which you can print the label:
   - Receiving Orders
   - Receiving Inbound Shipment Orders
   - Building Assembly Items for a Work Order
   - Picking Orders
2. If you did not set up Required printing for the process, on the mobile page, tap **Print**.
3. On the Print popup window, do the following:

   > **Note:** The default settings in the fields depend on the print report you use for the mobile process. See the help topic Configuring Print Action Settings for Standard Mobile Processes or Configuring or Creating Print Report Types.

   a. In the **Printer** field, select the printer you want to use.
   b. In the **Template** field, select the print template file.
   c. In the **Number of Copies** field, enter a number greater than 0 for the copies you want to print.
   d. Tap **Print**.

      Alternatively, if you have not set up Required printing for the process and you want to skip printing, tap **Skip**.

You can repeat steps a to d to print other labels that you have configured for the process.

4. On the Print page for item label, you can do the following:
5. After you print the labels, continue with the rest of the mobile process flow.

If you want additional copies or if you encounter a printing issue, you can reprint the label. See Reprinting Labels.

Reprinting Labels

You can reprint the documents printed from a mobile device, even those that failed the initial printing. You can send reprint requests from a mobile device or from the NetSuite user interface, as described in the following topics in this section:

- Reprinting from Your Mobile Device
- Reprinting from the NetSuite User Interface

Your file cabinet stores files for reprinting until they reach the retention time defined on your printing settings. By default, NetSuite WMS retains printable files in your file cabinet for 24 hours before it deletes them. If you want to view or update your file retention setting, see Configuring Mobile App Settings.

Print or audit logs in your mobile device or NetSuite user interface display the list of files for reprinting. You can access the reprint link in these logs until the printable files get deleted from your file cabinet. You can also view printing errors from these logs.

Reprinting from Your Mobile Device

Follow the steps in this procedure to reprint labels or reports from your mobile device.

To reprint labels and reports from your mobile device:

1. From the Main Menu, tap **Print Log**.
2. On the Print Log page, in the **Scan/Enter Print Reference** field, scan or enter the transaction number, the item, lot, or serial number. If you enter the data, press **Enter** to proceed.

   For item bar code scanning, composite and GS1 bar code formats are not supported
3. On the Print Log page, tap the date link for the document you want to reprint.
4. On the Print Record page, enter or select values in any of the following fields:
   - **Printer** - Select the name of the printer.

     If you do not find the printer you want to use, you can verify that it is set up correctly. See the help topic Setting Up Your Printers.
   - **Number of Copies** - Enter a number greater than 0 for the copies you want to reprint.
5. Tap **Reprint**.

Your reprint request is sent to the printer.

Reprinting from the NetSuite User Interface

Follow the steps in this procedure to reprint labels or reports from the NetSuite user interface.

To reprint labels and reports from the NetSuite user interface:

1. Using the Mobile Administrator role, go to Setup > Label Printing > Audits.
2. From the Print - Audits List, click the reprint URL link for the document you want to reprint.

   The Print - Reprint page appears.
3. (Optional) In the Reprint Details section, you can change the values in any of the following printing fields:
   - **Printer** - Select the printer you want to use
   - **Copies** - Enter a number greater than 0 for copies you want to reprint.
   - **Description** - Enter a short description of this reprint request for the audit logs.
4. Click **Reprint**.