

Computer Based Training

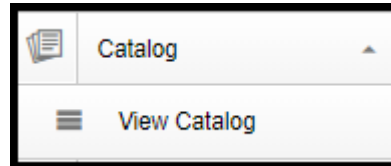
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Lesson 12: Objectives

- ❖ View Catalog
- ❖ Creating a Pick
- ❖ Creating a Pick From an Existing PO.
- ❖ Creating a Pick From A Reserved PO.
- ❖ Canceling a Pick
- ❖ Rolling Back a Pick
- ❖ Looking Up an Inventory Item
- ❖ Viewing Warehouse Inventory
- ❖ Viewing Warehouse SLA Statistics
- ❖ Tracking Data -**Tracking Data – Under Revision- Will be Available Soon**
- ❖ Searching Budget – Searching/ Entering Budget – Under Revision- Will be Available Soon**
- ❖ Entering Budget

Lesson 12: View Catalog

Users can view a catalog item by selecting the View Catalog link under the Catalog tab on the Home page.



Catalog Selection

Select the Location and then enter your search criteria.

Business Unit * Select A Business Unit
(This Business Unit will be assigned to the order)

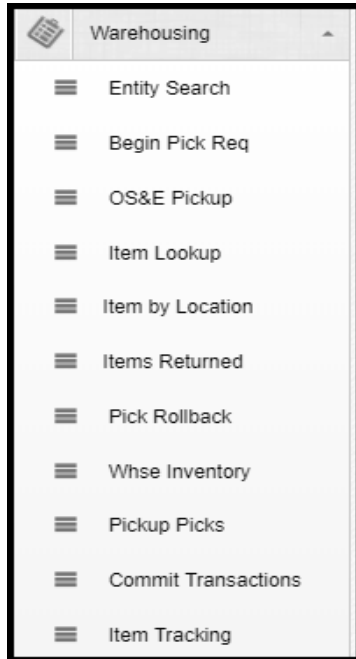
Show Item Images ☒ (If checked and an image is available it will display)

Keyword	Part Number	Material Group
<input type="text"/>	OR <input type="text"/>	CONSULTING AGREEMENT MAINT - HARDWARE 3YR PC/LAN - CARRY CASE PC/LAN - LAPTOP PC/LAN - MEM UPGRADE PC/LAN - MISC

Select

When Users select an item from the Catalog, a Business Unit (Country, Location, or Warehouse - dependent upon the Users application) and a Material Group or Part Number must be chosen. Some client configurations will automatically assign the Business Unit to the entity. Click Select when complete.

Lesson 12: Creating a Pick Request



To begin a Pick Request the User selects the Begin Pick Req button under the Warehousing tab on the Home page. From the Catalog Selection screen Pick from Warehouse field and Part Number or Material Group Code field must be entered. After the selections have been chosen click on the Select button.

A screenshot of the 'Catalog Selection' screen. The main dialog is titled 'Select the Warehouse and then select a Material Group'. It contains the following fields and options:

- Pick from Warehouse ***: A dropdown menu with the text 'Select A Warehouse'.
- Show Available Quantity**: An unchecked checkbox.
- Show Only In-Stock Items**: An unchecked checkbox.
- Show Item Images**: A checked checkbox with the text '(If checked and an image is available it will display)'.

Below these options is a table with three columns: **Keyword**, **Part Number**, and **Material Group**. The **Material Group** column is expanded, showing a list of items:

- Accessories - External
- Accessories - Internal
- Apple Accessories - External
- Apple Accessories - Internal
- Apple Desktop
- Apple Laptop

At the bottom of the dialog is a **Select** button.

Lesson 12: Creating a Pick Request

Select the Quantity from the Catalog Item Details screen and click the Add button. If the quantity requested is larger than the quantity available, the Pick Request will be placed on hold until the required quantities become available.

Catalog Item Details

Vendor	Material Group	Manufacturer	MFR Part No	Product Name	Image	Qty Avail	Quantity	
ACS VENDOR	Accessories - Internal	LENOVO	00162805 SPO	SYSTEM BOARD FOR LAPTOP T43P		Qty	<input type="text" value="1"/>	<input type="button" value="Add"/>
ACS VENDOR	Accessories - Internal	EVGA	015-P3-1582-AR	eVGA GeForce GTX 580 SuperClocked - graphics adapter - GF GTX 580 - 1.5 GB		Qty	<input type="text" value="1"/>	<input type="button" value="Add"/>
ACS VENDOR	Accessories - Internal	EVGA	01G-P3-1312-LR	eVGA GeForce 210 - graphics card - GF 210 - GB		Qty	<input type="text" value="1"/>	<input type="button" value="Add"/>

From the Entities Waiting Approval screen, the User is allowed to add items to an existing Pick Request that you are working on or create a New Pick Req; Select the **New Pick Req** link

Entities Waiting Approval

Choose item destination as
"New Pick Req" or select an existing Pick Req if
available.

Location	Type	Entity #	RITM# or INC#	Requested By	Requested For	Initialization	
ACSD - Anaheim CA							New Pick Req

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Lesson 12: : Creating a Pick Request

After the item is added to a new Pick Request, or to one previously created, you may either:

1. Add additional items to this Pick from the Catalog Selection screen, or
2. View the Pick by clicking on the View____ link.

Catalog Selection

Part Number 15206, Cables to Go 14ft Cat5E 350 MH, has been added to Entity .
[View ACSD0410998](#)

Select the Warehouse and then select a Material Group

Pick from Warehouse * ACS Burbank CA ▼

Show Available Quantity ☐

Show Only In-Stock Items ☐

Show Item Images ☒ (If checked and an image is available it will display)

Keyword		Part Number		Material Group
	OR		OR	<div style="font-size: 0.8em; padding: 2px;"> Accessories - External Accessories - Internal Apple Accessories - External Apple Accessories - Internal Apple Desktop Apple Laptop </div>

Select

Lesson 12: Creating a Pick Request

The Pick Request screen below contains fields for pulling equipment from the warehouse. Some fields can be filled in by clicking the field and typing in the order information. Other fields are filled in by using the pop-up or drop-down menus.

Pick Request Approval

Pick Request

Date & Time	01/09/2018 16:20:15	Requested By	Diane	Record #	2772584
Pick Request	ACSD0410998	Requested For		Req Date	
Location	1 - ACSD - Burbank CA	From Warehouse*	ACSD - Burbank CA	Action *	Approve Order
Priority	Normal	From Warehouse Address	ACS Burbank CA * Flower St * Burbank, CA * United States	Reject Reason	
Status	Submitted			Submit	Process
RITM# or INC#	BREAKFIX				
Classification*	Pull From Stock				
Entity X-Ref #					
Approvals	View Routing				
Entity Notes*	Pick approved 1/09/2018				
Attachments					

* Indicates Required Field

Add Catalog Item

Line	Material Group *	Vendor	Mfr	Mfr Part Nbr	Product Name	Qty *	
1	Accessories - External	ACS VENDOR	CABLES TO GO	15206	Cables to Go 14ft Cat5E 350 MHz Snagless Patch Cable - Blue	1	Update Delete
Override Primary Ship To: **Select A Ship To**							
Line Note:							

To add additional lines of equipment to a Pick, select the **Add Catalog Item** button and add the necessary equipment. To edit the current equipment information make the necessary changes on the equipment lines and click **Update**. To delete a line of equipment click on the **Delete** link for that particular line which requires deleting.

Select "Use Line Note Address" in the Override Primary Ship To field for Drop Ship addresses.

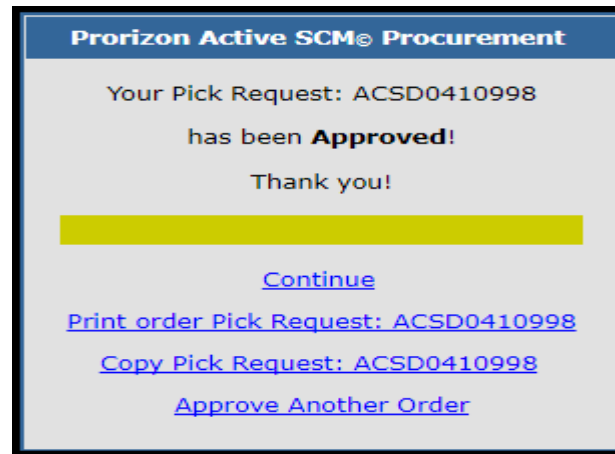
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Lesson 12: Creating a Pick Request




Upon approval, the system will automatically create a Pick Order. Its status may be reviewed at any time. An order confirmation screen will show the following:

- ❖ Continue – click this link to go to home page.
- ❖ Print order Pick Request – click to print the request.
- ❖ Copy Pick Request – click this link to copy the existing Pick Order.
- ❖ Approve Another Order – click this link to display the remaining Pick Requests to be approved.
- ❖ If there is not enough quantity available in the warehouse to process the pick at approval time, the following example message will be displayed, "Pick Order is pending receipt of additional inventory for the parts as shown :2767-C44"; the system will automatically release the order as soon as there is enough quantity in the warehouse to fulfill the order. This action starts Prorizon's SLA clock. The only exception are refresh orders. Prorizon should receive approximately 1 weeks notice to fulfill these orders.

Lesson 12: Creating a Pick From An Existing PO

Users are allowed to create a Pick Request from an existing RSV (Reserved) or BTO (Build To Order) PO. Begin by clicking on the **Create Pick** link on the PO you would like to create the Pick from.

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Status	Entity Number	RITM# or INC#	Requested By	Date	Inv Due Date	Entity Amount	Last Approver	
PO Issued	3007518951-P001 ACSD - Orlando FL Print Copy Create Pick	RITM1676516	r	01/03/2018	00/00/0000 	1.00	ACS Approved	Select
Vendor from				ZONES Line# 10 cancelled - 01/05/18 -				
								Tracking

Select either **Continue** or **Cancel** from the Copy PO to Create Pick confirmation screen.

Copy PO to Create Pick Confirmation

Confirm Copy PO to Create Pick

Do you want make a new PICK REQUEST from this entity?

Entity Number3007518951-P001
RITM# or INC#RITM1676516

ContinueCancel

Lesson 12: Creating a Pick From An Existing PO

The Pick Request screen will be pre-populated with the information from the PO. Enter the required fields which did not populate with data, select the Action field dropdown, select “Approve Order”, and click the **Process** button.

Pick Request Approval

Pick Request

Date & Time	01/09/2018 16:46:01	Requested By	Diane	Record #	2772586
Pick Request	ACSD0410999	Requested For		Req Date	
Location	S - ACSD - FL	From Warehouse *	ACSD - FL	Action *	* Choose Action *
Priority	Normal	From Warehouse Address	ACS I Orlando FL * 1138 Celebration,	Reject Reason	
Status	Submitted			Submit	Process
RITM# or INC# *	RITM1676516				
Classification *	**Select A Classification				
Entity X-Ref #					
Approvals	View Routing				
Entity Notes *	Vendor from Interface: ZONES Line# 10 cancelled - 01/05/18 - rthomassen				
Attachments					

* Indicates Required Field

Prorizon Active SCM® Procurement

Your Pick Request: ACSD0410999
has been **Approved!**
Thank you!

[Continue](#)

[Print order Pick Request: ACSD0410999](#)

[Copy Pick Request: ACSD0410999](#)

[Approve Another Order](#)

The new Pick is created.

Status	Entity Number	RITM# or INC#	Requested By	Date	Inv Due Date	Entity Amount	Last Approver	
Released	ACSD0410999-K001 ACSD - FL Print Copy	RITM1676516	Diane	01/09/2018	00/00/0000	1.00	Diane	Select
Vendor from Interface: ZONES Line# 10 cancelled - 01/05/18 - rthomassen								
Approved	ACSD0410999 ACSD - FL Print Copy Change Order	RITM1676516	Diane	01/09/2018	00/00/0000	1.00	Diane	Select
Vendor from Interface: ZONES Line# 10 cancelled - 01/05/18 - rthomassen								

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Lesson 12: Creating a Pick From Reserved PO

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The Reserved PO process allows the Prorizon system to tie a Pick Order to a specific Purchase Order by the External Request # - i.e. -RITM# or Ticket number. The PO must be designated as Reserved.

Once a PO has been designated as Reserved in the Prorizon system, a Reserved Pick Order can be created by clicking the Create Pick link on the Entity Search screen. The resulting Pick will include all the detail line items on the originating PO.

The PO Entity screen will display the following information regarding the PO and the Pick being created: "RESERVED" will be displayed at the top of the Entity screen; The External Request # - i.e. -RITM# or Ticket number being created.

Purchase Order - RESERVEDRevision : 0

Date & Time
04/18/2017 12:00:00

PO #
3007279533-P001

Location
5 * ACSD - Orlando FL

Priority
Normal

Status
PO Issued

RITM# or INC#
RITM1265069

Entity X-Ref #
ACSD0411026

Approvals
[View Routing](#)

Requested By
Annette

Requested For
ACS FL *
Celebration Blvd * Celebration, FL *
United States

Ship To
Bill To
Remit To

PO Issued Date
04/19/2017

Invoice Number

Invoice Due Date

Record #
2772063

Classification

Reject Reason

Assigned To:
[Kevin Perez](#)

Blanket PO Fields		PO Type		Frequency		Begin Date		End Date		Total Approved Amt		Remaining Amt	
United States Dollars		Standard				00/00/0000		00/00/0000		0.00		0.00	
Net	4,020.00	+	Shipping	0.00	+	Handling	0.00	+	Duties	0.00	+	Tax	0.00
												+	Adjustment
												=	Entity Total
													USD Total
													4,020.00
													4,020.00

Display Detail in
[USD](#) or [Local](#) currency.

Entity Notes
Vendor from

[Attachments](#)

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Lesson 12: Creating a Pick From Reserved PO

Pick Request			
Date & Time	01/11/2018 17:46:18	Requested By	Falvo, Diane
Pick Request	ACSD0411028	Requested For	
Location	5 - ACSD - Orlando FL	From Warehouse*	ACSD - Orlando FL
Priority	Normal	From Warehouse Address	ACS Celebration Blvd * Celebration, FL * United States
Status	Submitted		
RITM# or INC# *	RITM1265069		
Classification*	**Select A Classification		
Entity X-Ref #	3007279533-P001		
Approvals	View Routing		
Entity Notes*	Vendor from		
* Indicates Required Field			
Attachments			

After approval, the Pick Order will display similar information designating it as a Reserved Pick: “RESERVED” will be displayed at the top of the Entity screen; New Pick Order number; External Request # - i.e. –RITM# or work Order number; Originating PO number.

Throughout this process, it’s imperative that the RITM or Work Order number not be changed, otherwise the PO and Pick will not remain connected.

Once a Pick has been created from a PO, the Create Pick link will no longer appear. That is, you cannot create additional Picks from that PO.

Pick Order - RESERVED			
Date & Time	01/11/2018 17:46:18	Requested By	Falvo, Diane
KO#	ACSD0411028-K001	Requested For	
Location	5 * ACSD - Orlando FL	From Warehouse	ACS Celebration Blvd * Celebration, FL * United States
Priority	Normal	Picked By	Kevin Perez
Status	Released		
RITM# or INC#	RITM1265069		
Entity X-Ref #	3007279533-P001		
Approvals	View Routing		
Entity Notes	Vendor from Interface: ZONES INC		
Attachments			

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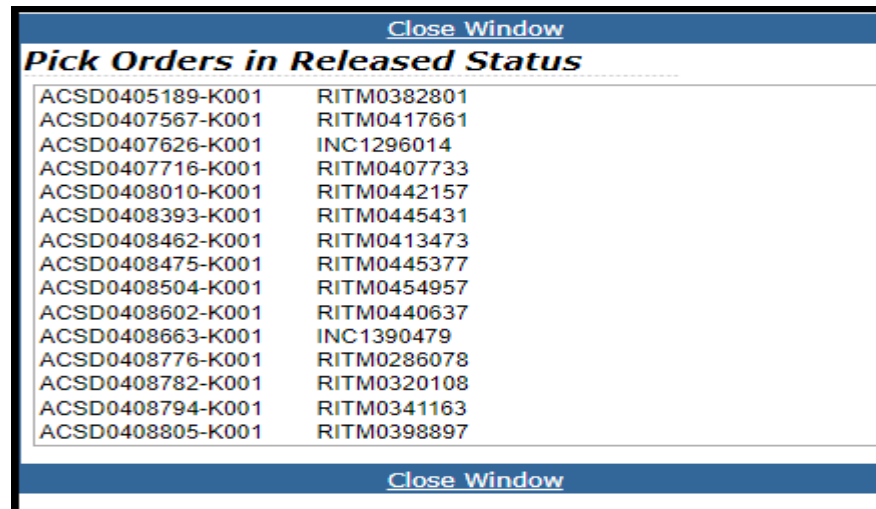
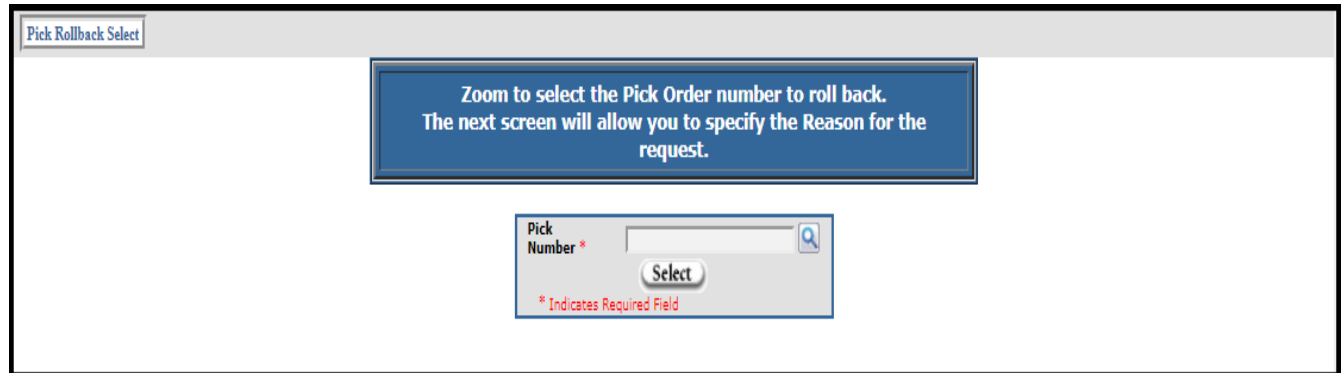
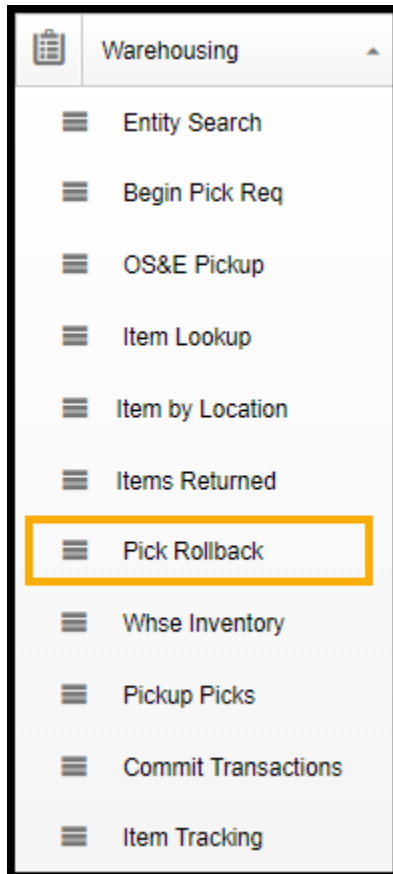
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Lesson 12: Rolling Back a Pick Request

A User has the ability to make changes on a Pick in Release status by utilizing the Pick Rollback function under the Warehousing tab on the Home page. Click on the pop-up button and select a Pick Order number to roll back.



Lesson 12: Rolling Back a Pick Request

User can now enter a reason to roll the Pick back. After the **Submit** button is clicked the User will be brought back to the Approval Routing screen for the rolled back Pick.

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Pick Rollback Action

Enter a Reason for rolling the pick back to your queue.

Pick Number	ACSD0407567-K001
Location	ACSD - Burbank CA
Pick Status	Released
Pick Notes	early refresh
Rollback To	Diane
Requested By	Diane
Reason *	Early system refresh

Submit

* Indicates Required Field

Approval Routing

Approval Routing						
Entity Number ACSD0407567-K001						
Action	User	Date	Time	Status	Note	
	Elizabeth	12/11/2015	8:35:06 am	Initiated		
	Elizabeth	12/11/2015	8:43:40 am	Submitted		
	Diane	01/09/2018	5:04:36 pm	Moved Back	Moved back to submitted by request of Diane	- Reason: Early system refresh
	Diane			Pending		
				In Process		
				Picked		
				Closed		

Lesson 12 Canceling a Pick Order

Picks awaiting pickup in the pick lane can be cancelled without using a Change Order.

Begin by clicking the **Cancel Pick** link for the selected entity.

In-Process	ACSD0410994-K001 ACSD - Anaheim CA Network Print Copy Cancel Pick	STOCK/RITM7363446	Dennis	01/04/2018	00/00/0000	0.00	Dennis	Select Tracking
DRPSHACPT								

Enter the Reason for canceling the Pick and click **Submit**.

[Cancel Pick](#)

Enter a Reason for cancelling the pick.

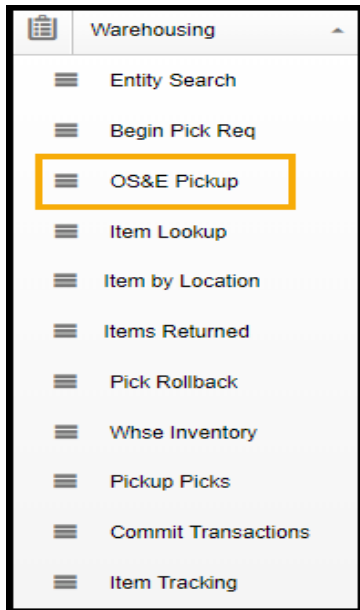
Pick Number	ACSD0410994-K001
Location	ACSD - Anaheim CA Network
Pick Status	In-Process
Pick Notes	DRPSHACPT
Requested By	Diane
Reason *	

Submit

* Indicates Required Field

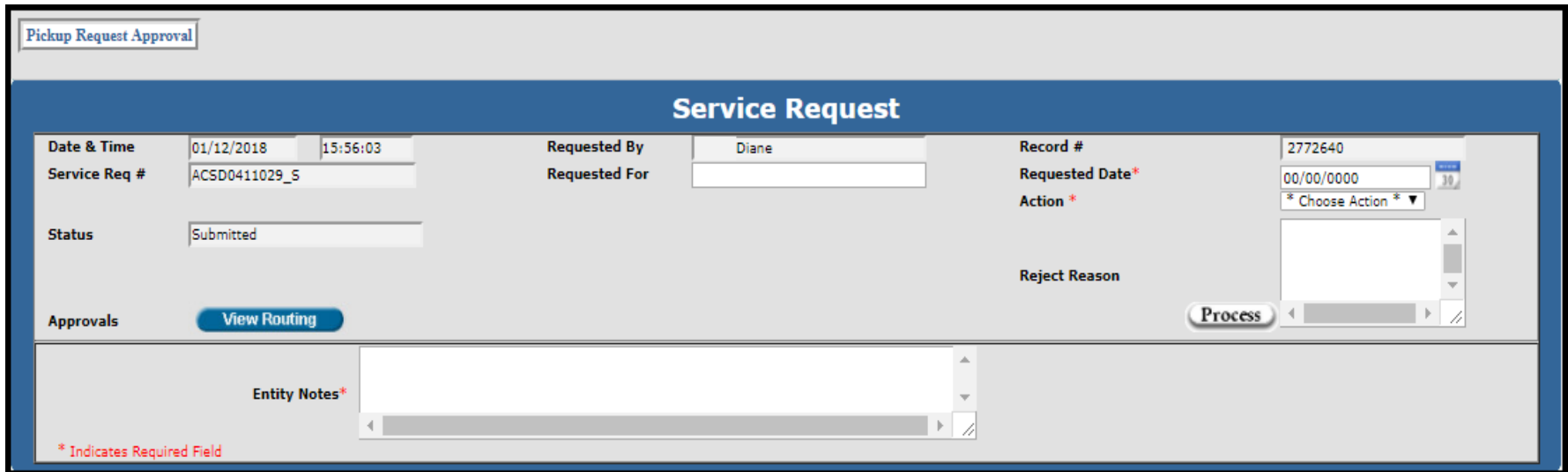
In the case of a Pick which has been picked, the Entity will move to a “Return to Stock” status.

Lesson 12 OS&E Pickup



A screenshot of a software menu titled "Warehousing". It contains a list of options: Entity Search, Begin Pick Req, OS&E Pickup (highlighted with a yellow box), Item Lookup, Item by Location, Items Returned, Pick Rollback, Whse Inventory, Pickup Picks, Commit Transactions, and Item Tracking.

The OS&E Pickup function creates a service order request in the system that is used as notification to pick up off site inventory for return to the warehouse. Entity Notes, Requested Date, and Action fields are required. The items which require pick up must be specified in the Entity Notes.

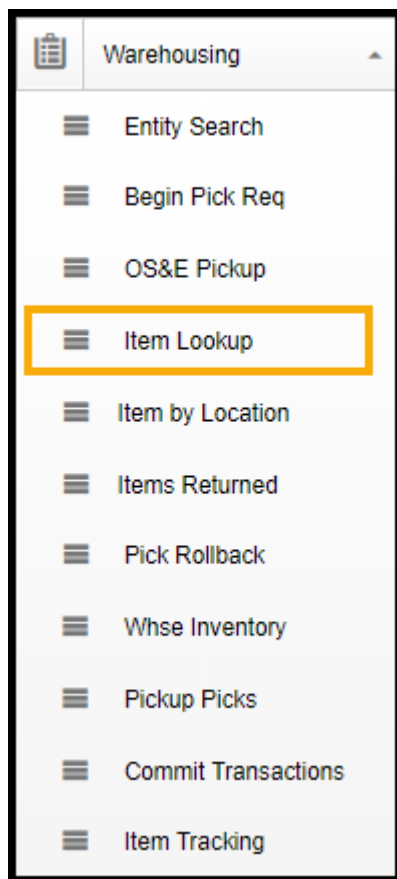


A screenshot of the "Service Request" form. The form has a header "Service Request" and a sub-header "Pickup Request Approval". It contains several fields: Date & Time (01/12/2018 15:56:03), Requested By (Diane), Record # (2772640), Service Req # (ACSD0411029_S), Requested For (empty), Requested Date* (00/00/0000), Action* (* Choose Action*), Status (Submitted), Reject Reason (empty), Approvals (View Routing button), and Entity Notes* (empty). A "Process" button is located at the bottom right. A red asterisk indicates required fields.

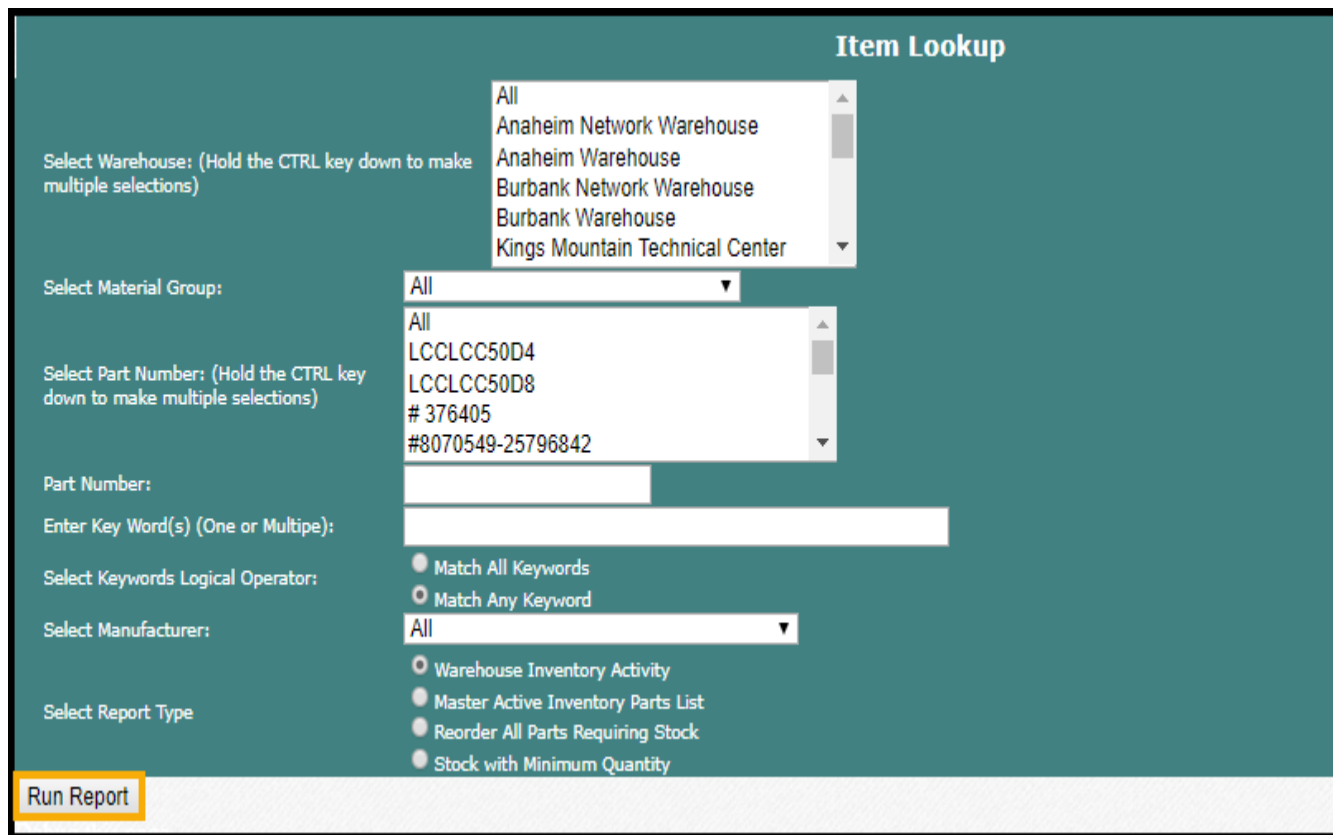
* Indicates Required Field

Lesson 12: Item Lookup

Users can search for equipment/warehouse information by clicking on **Item Lookup** button located under the Warehousing tab on the Home page. Select the Warehouse, Material Group, Part Number, or Part Description and click on **Run Report**.



A screenshot of a software interface showing a 'Warehousing' menu. The menu is a vertical list of options, each preceded by a small icon. The 'Item Lookup' option is highlighted with a yellow rectangular border. The other options in the menu are 'Entity Search', 'Begin Pick Req', 'OS&E Pickup', 'Item by Location', 'Items Returned', 'Pick Rollback', 'Whse Inventory', 'Pickup Picks', 'Commit Transactions', and 'Item Tracking'.

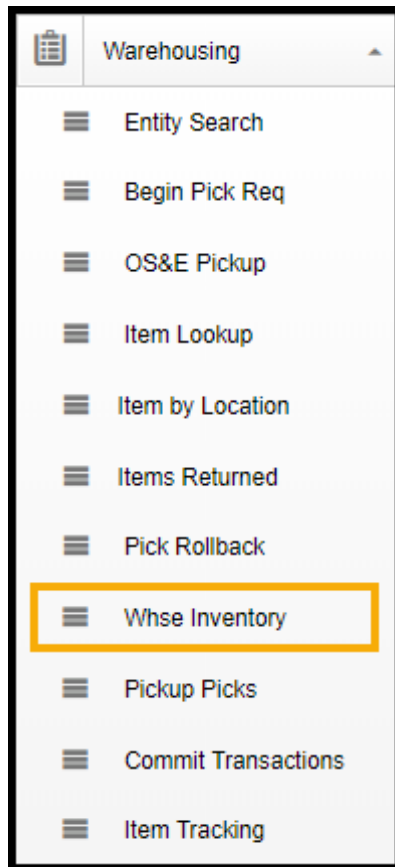


A screenshot of the 'Item Lookup' form. The form has a teal background and contains several input fields and a 'Run Report' button at the bottom left. The 'Run Report' button is highlighted with a yellow rectangular border. The form fields include:

- Select Warehouse:** (Hold the CTRL key down to make multiple selections) with a dropdown menu showing: All, Anaheim Network Warehouse, Anaheim Warehouse, Burbank Network Warehouse, Burbank Warehouse, Kings Mountain Technical Center.
- Select Material Group:** with a dropdown menu showing: All, LCCLCC50D4, LCCLCC50D8, # 376405, #8070549-25796842.
- Select Part Number:** (Hold the CTRL key down to make multiple selections) with a text input field.
- Part Number:** with a text input field.
- Enter Key Word(s) (One or Multiple):** with a text input field.
- Select Keywords Logical Operator:** with radio buttons for 'Match All Keywords' and 'Match Any Keyword'.
- Select Manufacturer:** with a dropdown menu showing: All, Warehouse Inventory Activity, Master Active Inventory Parts List, Reorder All Parts Requiring Stock, Stock with Minimum Quantity.
- Select Report Type:** with a text input field.

Lesson 12: Whse Inventory

Users can search for the value of items in a warehouse by clicking on the **Whse Inventory** link located under the Warehousing tab on the Home page. Select the date which you would like the values calculated on and click Submit. The values for that day will be displayed. Each warehouse may be clicked on to display the equipment in stock for that warehouse on that day and the values of that equipment.



Warehouse Values

Run Date - 01/11/2018 20:55:15

As of end of day:

☐ Stock Only
☐ Include non-stock

Warehouse	Number	Percentage	Value	Percentage
Total		0.00%	\$0.00	0.00%

Lesson 12: Warehouse Management Complete!

- ❖ To continue with the next lesson, please press the Next button
- ❖ To review this lesson, please press the Back button
- ❖ To return to the CBT menu, please press the Menu button
- ❖ To end CBT Training, please press the End button

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Thank You For Your Viewing The Prorizon Active SCM CBT Training Module



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