CHAPTER 6: ITEM TRACKING WITHIN WAREHOUSE MANAGEMENT SYSTEMS

Objectives

The objectives are:

- Get prepared for item tracking.
- Receive item-tracked items.
- Move item-tracked items.
- Ship item-tracked items.
- Pick according to FEFO.

Introduction

Warehouse Management Systems (WMS) provides item tracking functionality which is helpful when items are associated with warranties or have expiration dates, or when dealing with hazardous products.

The Item Tracking granule in Microsoft Dynamics® NAV provides a company with an easy-to-use tracking system, which can take into account information about each unique piece of merchandise, such as:

- When it is received.
- Where it is placed.
- When it expires.
- Which customer bought it and when.

The functionality is based on using serial and lot numbers and allows for the receipt and shipment of multiple quantities with serial and lot numbers from a single order line entry. Item tracking entries, which represent the transaction history of each individual item with serial and/or lot numbers, are the records used to trace an item along its movement through the supply chain.
Preparation of Warehouse Management Systems for Item Tracking

**NOTE:** Before you begin, you must install a clean database.

Before using the item tracking functionality, Warehouse Management Systems must be set up for handling item tracking information. The defined settings instruct the program to request item tracking information for all processes defined in the Warehouse Management setup. Setup involves the following steps:

1. In the Navigation Pane, click **Departments > Administration > Application Setup > Warehouse > Inventory**, and in the Lists, click **Item Tracking Codes**.

![Fig 6.1 Item Tracking Codes](image-url)
2. Open the tracking code card for the SNALL code.
3. Expand the **Serial No.** FastTab, and select the **SN Warehouse Tracking** check box:

![Figure 6.2 THE SN WAREHOUSE TRACKING CHECK BOX SELECTED](image)

**NOTE:** To indicate that warehouse document lines require lot numbers, select the **Lot Warehouse Tracking** check box on the **Lot No.** FastTab of the item tracking code card.

The program is now set up to handle item tracking information in warehouse processes.

**NOTE:** To follow the scenarios described in this chapter, it is necessary to define item tracking parameters for item 80001, Computer III 533MHz.
Now, set up the item for using the item tracking functionality.

1. In the Navigation Pane, click the **Reference Data** button, then click **Items**; browse to item 80001 and open its card.
2. Expand the **Item Tracking** FastTab.

![FIGURE 6.3 THE ITEM TRACKING FASTTAB OF THE ITEM CARD](image)

3. Click the **AssistButton** next to the **Item Tracking Code** field. In the **Item Tracking Codes** window, select the SNALL code and click **OK**.

The selected item tracking code indicates that the program will trace inbound and outbound serial numbers and perform warehouse tracking for the item in question. The settings for the code can be viewed on the item tracking code card.

4. Click the **AssistButton** next to the **Serial Nos.** field, and from the **No. Series** window, select the SN1 code and click **OK**.
Now that the number series code is specified, the program uses it to automatically assign consecutive serial numbers to the items produced. In case you receive items with serial numbers already specified, you must use these external number series.

**FIGURE 6.4 SELECTING SERIAL NUMBERS FOR THE ITEM**

With these settings defined, the item is set up for item tracking.

**Receiving Items with Item Tracking Information**

When receiving items that are set up for item tracking functionality, it is necessary to add the tracking information when registering the items as received. Options on whether or not to add tracking information are defined on the location card (select the **Require Receive** check box) and on the item tracking procedure on the item tracking code card (select the **SN Warehouse Tracking** and/or **Lot Warehouse Tracking** check boxes).

The following scenario demonstrates how to receive an item with item tracking information.
Scenario: Receive and Put Away Items with Item Tracking Information

The Device Shop has ordered 32 computers for their Administrative Department from the Cronus Company. To keep track of these specific computers, the warehouse manager supplies the items with item tracking information. The computers must be purchased from the Electronics Ltd. vendor.

Create a sales order for customer 62000, The Device Shop, for 32 pieces of item 80001, and place a purchase order to vendor 61000 Electronics Ltd. for the same quantity to be delivered at the White warehouse. Remember to release both orders.

Your task is to receive and put away the items, applying item tracking information when receiving.

1. On the Activities part of the Home page, click New Whse. Receipt to create a new receipt. In the Location Code field, select the White location.
2. Click Get Source Documents, and then select the purchase order just created. Click OK to copy the lines from the purchase order to the receipt.

The item on the line from the purchase order is now ready to be handled, and item tracking information is to be applied.
3. In the **Warehouse Receipt** window, on the line, click the **Actions**
icon, and then click **Line, Item Tracking Lines**.

![FIGURE 6.6 ITEM TRACKING LINES FOR ITEM 80001](image)

A number series for the item tracking code SNALL is already defined during the
setup of item tracking for item 80001. Therefore, the program can define serial
numbers for all 32 items.

4. In the **Item Tracking Lines** window, click **Actions, Functions,**
Assign Serial No. The **Enter Quantity to Create** window appears.

![FIGURE 6.7 EDITING THE QUANTITY OF SERIAL NUMBERS AND CREATING A NEW LOT](image)
Now there is the opportunity to edit the quantity of serial numbers to be created and to create a new lot containing these serial numbers.

5. For this scenario, choose to accept the full quantity and confirm by clicking OK, and serial numbers are created for all 32 pieces.

![FIGURE 6.8 SERIAL NUMBERS CREATED](image)

6. Close the Item Tracking Lines window. The serial numbers are now added for the items on the receipt line.

7. Complete the receiving of the items by clicking Post Receipt on the Action Pane.
The next step is to put the items away.

8. On the Activities part of the Home page, click **Put-aways - All**, and then open the put-away just created.

![FIGURE 6.9 WAREHOUSE PUT-AWAY WITH MULTIPLE LINES](image)

The number of lines for this specific order has now multiplied: the program has created two lines, Take and Place, for each serial number. This happened because now each of the 32 items is unique, and, therefore, each is displayed individually. Since there is no need to change any of the lines, now register the put-away.

9. On the Action Pane, click **Register Put-away**.

The items are now in stock, available for picking.

**Scenario: Print Physical Inventory List with Lot Numbers Shown**

This demonstrates the tasks involved in performing physical inventory of items with serial/lot numbers.

The warehouse worker in charge of location White must perform the annual count of inventory items carrying serial/lot numbers. The worker initiates the process by filling the physical inventory journal with calculated inventory quantities, prints the Physical Inventory List report, and continues to do the physical counting. In the process, the worker records that one M780 monitor is missing and that a forgotten lot of ten hard disks is found.
Prepare the physical inventory journal and calculate inventory.

1. In the Navigation Pane, click the Journals button, and then click Whse. Phys. Invt. Journals.
2. On the Action Pane, click Calculate Inventory, and set a location code filter for White. Click OK to run the calculation.
4. Do not set any filters. Expand the Options FastTab and select both the Show Serial/Lot Number and Show Qty. (Calculated) check boxes.

FIGURE 6.10 SETTING OPTIONS FOR PRINTING THE PHYSICAL INVENTORY LIST
5. Click **Preview** to see the draft of the physical inventory list report.

![Figure 6.11 LOT NUMBERS SHOWN ON THE PRINT PREVIEW](image)

Notice that serial/lot numbers are listed in extra information columns under the item in question. The quantity of each (here, all the items are serialized) is shown in the **Quantity (Base)** field, and each serial/lot number has a separate line in which to enter the counted quantity.

### Moving Items with Item Tracking Information

Moving items around within the warehouse can be a daily routine. Pick routines are frequently updated and items are moved around so that they are placed in a forward picking area or for any other optimization routine. There are many reasons for moving items around the warehouse.

The following scenario demonstrates how items with item tracking information are moved within Warehouse Management Systems.

**Scenario: Move Items with Item Tracking Information**

A survey shows that the bin carrying item 80100, W-04-0001 has a high risk of collapsing when holding the weight load close to that maximum specified. The warehouse manager has decided that 25% of the quantity in the bin must be moved to a different bin, W-04-0003 of the PICK zone.
Your task is to move the items taking into account the item tracking information.

1. On the Activities part of the Role Center, click **Edit Movement Worksheet**. In the movement worksheet, enter the information from the scenario.

![Edit Movement Worksheet](image)

**FIGURE 6.12 CREATING A WAREHOUSE MOVEMENT**

2. Click **Related Information, Line**, and then click **Item Tracking Lines**. In the **Whse. Item Tracking Lines** window, enter the eight serial numbers for the items that need to be moved. Remember to fill in the **Quantity** field.
NOTE: This information is entered manually/scanned according to the items picked. For exercise purposes, check the warehouse registers for the item tracking information.

FIGURE 6.13 SERIAL NUMBERS FOR THE ITEMS THAT MUST BE MOVED

4. In the **Movement Worksheet** window, on the Action Pane, click **Create Movement**, and then click **OK**.

5. On the Activities part of the Home page, click **Movements - All**. Open the movement just created.

![FIGURE 6.14 MOVEMENT READY TO BE PERFORMED](image)

The lines are split up into the two actions, Take and Place, for each serial number. The Take line is for taking the item from bin W-04-001. The Place line is for placing the item to bin W-04-003. The movement is ready to be performed.

6. Click **Register Movement**.

The items with the specified serial numbers are now moved.

**NOTE**: Items can be set for using item tracking information after taking care of the warehouse movement document.

**Shipping Items with Item Tracking Information**

When items registered with item tracking are shipped, they must contain item tracking information. This will happen if the serial/lot specific tracking is used and the **SN Warehouse Tracking** check box on the item tracking code card is selected.

**Scenario: Ship Items with Item Tracking Information**

One of Cronus Company’s customers, The Device Shop (customer 62000), has decided that they want a partial delivery of 16 computers, item 80001, to be expedited right away.
Your task is to create a shipment for item 80001.

1. On the Activities part of the Home page, click **New Whse. Shipment** to create a new shipment. In the **Location Code** field, select the White location.

2. On the Action Pane, click **Get Source Documents**. Select the sales order just created, and click **OK** to confirm. The line is copied to the shipment document.

3. From the shipment document, click **Create Pick**. A pick activity is created.

4. On the Activities part of the Home page, click **Picks - All**. Open the pick just created. The pick document contains 32 items. Since a partial delivery of 16 is being made, the lines that exceed the quantity needed must be deleted.

5. Delete the extra lines so as to only pick from bin W-04-0001.

6. In the **Serial No.** fields, enter the serial numbers for the items to be shipped (click the **AssistButton** next to the **Serial No.** field, and select the numbers for the items that are to be picked).
7. Click **Register Pick**. The pick is now registered, and the shipment lines are updated.

8. In the Navigation Pane, click **Home, Warehouse Shipments**, and then open the shipment created at steps 1-2.

**FIGURE 6.16 PARTIAL DELIVERY IS TO BE MADE**
9. To verify the item tracking information, on the lines, click **Actions**, **Line**, and then click **Item Tracking Lines**.

**FIGURE 6.17 VERIFYING ITEM TRACKING INFORMATION**
10. Close the **Item Tracking Lines** window. In the warehouse shipment, click **Post Shipment**, and then select **Ship**. The shipment is now shipped. The rest of items are to be shipped later as another partial shipment.

![FIGURE 6.18 ITEMS SHIPPED PARTIALLY](image)

**Scenario: Generate Pick Lines**

Another way of handling item tracking information in WMS is demonstrated in the following scenario - using the pick worksheet to get better control over the number of lines to be created in the pick document.

Customer 62000, The Device Shop, has ordered an additional four units of item 80001 to be delivered right away.
Your task is to perform the pick, and ship the items using the pick worksheet to generate the needed pick lines.

1. In the Navigation Pane, click the **Worksheet** button, then click **Pick Worksheets**. In the header, in the **Batch Name** field, select the Default batch for the White location.

2. On the Action Pane, click **Get Warehouse Documents**.

![A PICK SELECTION](image)

**FIGURE 6.19 A PICK SELECTION**
3. In the **Pick Selection** window, select the line for the shipment created previously. Click **OK**. The line from the shipping document is copied to the pick worksheet.

![Pick Selection Window](image)

**FIGURE 6.20 A SHIPMENT LINE COPIED TO THE PICK WORKSHEET**
4. In the Qty. to Handle field, change the quantity to 4. Click Create Pick.

5. On the Activities part of the Home page, click Picks - All, and then open the pick just created. In the Serial No. fields, enter the serial numbers (click the AssistButton next to the Serial No. field) for the items to ship.

FIGURE 6.21 SERIAL NUMBERS ENTERED
6. Click **Register Pick**.
7. In the Navigation Pane, click **Home, Warehouse Shipments**, and then open the shipment just updated.

**FIGURE 6.22 THE WAREHOUSE SHIPMENT DOCUMENT UPDATED**
8. On the lines, click **Actions, Line, Item Tracking Lines** to assure that all tracking lines are in place.

![Image](image.png)

**FIGURE 6.23 SERIAL NUMBERS OF THE ITEMS TO BE SHIPPED**

9. Close the **Item Tracking Lines** window. In the **Warehouse Shipment** window, click **Post Shipment**, and then select **Ship**. The shipment document is updated.

This concludes the shipping of items containing item tracking information.
Picking According to FEFO

Items set up for working with item tracking information can be picked according to their expiration dates. For that purpose the Pick According to FEFO (First-Expired-First-Out) function is used. Items with the earliest expiration dates have priority to be picked first. The Pick According to FEFO functionality can be enabled on the Bin Policies FastTab of the location card.

![Location Card](image)

**FIGURE 6.24 ENABLING PICKING ACCORDING TO FEFO ON THE LOCATION CARD**

*NOTE: You must distinguish between FEFO and FIFO. FIFO stands for the First-In-First-Out functionality, which is used as a costing method when the inventory has to be valued according to the cost of the goods as they are entering and exiting the stock. Microsoft Dynamics NAV 2009 tracks the goods according to FIFO when performing replenishment or movements.*

For FEFO to work in the program, the location and items must meet the following criteria:

- The **Pick According to FEFO** check box on the location card must be selected.
- The item tracking code for the item must be set up for serial-number-specific or lot-specific warehouse tracking.
- The item entries must be registered and posted with expiration dates.
When these criteria are met, the program creates picks according to FEFO in pick and movement documents. This is the case only if the source document line does not already contain information on item tracking concerning which serial or lot number is going to be used.

When picking by FEFO, the program selects available items with the nearest expiration date. Then a list of temporary item tracking codes is generated based on the expiration date. If there are two items with an identical expiration date, the item with the lowest lot or serial number is selected. If those numbers are the same, then the program selects the item that is registered first.

**NOTE:** To create movements according to FEFO, leave the From Bin Code field empty in the movement worksheet.

The following scenario illustrates using the FEFO method while picking the item.

**Scenario: Pick According to FEFO**

Cronus customer 01905893, Candoxy Canada Inc., has ordered 10 units of item 80014, 512 MB PC800 ECC, with two different numbers of lot series. You can buy memory cards of two different sets from vendor 01905283, Mundersand Corporation.

It is necessary to add the item tracking information into the warehouse history journals when you register the items as received and shipped using the FEFO method for the White location.

The steps you must perform are divided into several phases.

First you must set up items for using item tracking information.

1. In the Navigation Pane, click Reference Data, Items. Open item card for item 80014, 512 MB PC800 ECC, and expand the Item Tracking FastTab.
2. Click the **AssistButton** next to the **Item Tracking Code** field, and in the item tracking code list, click **Advanced** to open the **Item Tracking Code** window. Select LOTALL and click **Actions, Edit**.

3. Expand the **Lot No.** FastTab, and select the **Lot Warehouse Tracking** check box. Close the **Item Tracking Codes Card** and **Item Tracking Codes** windows.

![FIGURE 6.25 THE LOT WAREHOUSE TRACKING CHECK BOX SELECTED](image)

4. Make sure that the White location is set up for using the FEFO method - on the **Bin Policies** FastTab, select the **Pick According to FEFO** check box.

Now create a sales order.

1. In the Navigation Pane, click **Home, Sales Orders**. Click **New** to create a new sales order.

2. In the **Sell-to Customer No.** field, enter 01905893.

3. In the **External Document No.** field, enter 01905893.

4. On the **Shipping** FastTab, in the **Location Code** field, change the Yellow location to White.

5. On the sales line, in the **Type** field, select **Item**. In the **No.** field, select 80014.

   In the **Quantity** field, enter 10. If the **Check Availability** window appears, click **Yes**.

   Leave the value in the **Unit Price Excl. VAT** field as is (for the practicing purpose).


7. Create the warehouse shipment by clicking **Actions, Functions, Create Whse. Shipment**. The created warehouse shipment appears. We will need it later, so close it for now.
Now you must create 2 purchase orders for receiving 2 lots of items with different dates. The following procedure describes creating of the first purchase order.

1. On the Activities part of the Home page, click **New Purchase Order** to create a new purchase order.
2. In the **Buy-from Vendor No.** field, enter 01905283. Change the **Posting Date** and **Order Date** to 01/08/10. In the **Vendor Invoice No.** field, enter 01905283-1. In the **Location Code** field of the Shipping FastTab, select the White location.
3. On the purchase line, in the **Type** field, select **Item**. In the **No.** field, select 80014. In the **Quantity** field, enter 7. Leave the value in the **Direct Unit Cost** field as is (for the practicing purpose).

Now it is necessary to register the item receipt for this purchase order.

1. On the Activities part of the Home page, click **New Whse. Receipt** to create a new receipt.
2. In the **Location Code** field, select the White location and change the value of **Bin Code** to W-08-0002. Click **Get Source Documents**, and then select the purchase order you just created. Click **OK**, and the lines from the purchase order are copied to the receipt.
3. On the receipt line, click **Actions, Line, Item Tracking Lines**.
4. For the line, in the **Quantity (Base)** field, enter 7; in the **Lot No.** field, input LOT-007; and in the **Expiration Date** field, type 10/01/10. Then confirm by clicking **OK**.

5. Complete the receipt of the items by clicking **Post Receipt** on the Action Pane. Confirm the posting of the receipt.
As a result, the program creates a put-away for the item, which has to be registered.

1. To register the put-away, on the Activities part of the Home page, click **Put-aways - All**, and then browse to the put-away just created.
2. On the Action Pane, click **Register Put-Away** to register the created put-away.

Now create the second purchase order. The procedure is the same as with the previous purchase order.

1. On the Activities part of the Home page, click **New Purchase Order** to create a new purchase order.
2. In the **Buy-from Vendor No.** field, enter 01905283. Change the **Posting Date** and **Order Date** to 01/08/09. In the **Vendor Invoice No.** field, enter 01905283-2. In the **Location Code** field of the Shipping FastTab, select the White location.
3. On the purchase line, in the **Type** field, select **Item**. In the **No.** field, select 80014. In the **Quantity** field, enter 5. Leave the value in the **Direct Unit Cost** field as is (for the practicing purpose).

Now a receipt can be created with this purchase order as a source document. The receipt is necessary for registering item receiving.

1. On the Activities part of the Home page, click **New Whse. Receipt** to create a new receipt.
2. In the **Location Code** field, select the White location and change the value of **Bin Code** to W-08-0002. Change the value in the **Posting Date** field to 01/08/09. Click **Get Source Documents**, and then select the purchase order you just created. Click **OK**, and the lines from the purchase order are copied to the receipt.
3. On the receipt line, click **Actions, Line, Item Tracking Lines**.
4. For the line, in the **Quantity (Base)** field, enter 5; in the **Lot No.** field, input LOT-006; and in the **Expiration Date** field, type 01/02/10. Then confirm by clicking **OK**.
5. Complete the receipt of the items by clicking **Post Receipt** on the Action Pane. Confirm the posting of the receipt.
The program creates a put-away for the item, which has to be registered.

1. On the Activities part of the Home page, click **Put-aways - All**, and then browse to the put-away just created.

![Figure 6.27 The Put-Away to be Registered](image)

2. On the Action Pane, click **Register Put-Away** to register the created put-away.

The two purchase orders are created. The next phase is creating a pick from the warehouse shipment, and registering it. On this phase, the FEFO method is used to define which lot expiration date is earlier.

1. In the Navigation Pane, click **Home, Warehouse Shipments**. Open the warehouse shipment created from the sales order.
2. In the shipment, click **Create Pick**. A pick activity is created.
3. On the Activities part of the Home page, click **Picks - All**. Open the pick just created.

![FIGURE 6.28 THE NEW PICK CREATED](image1)

4. Click the **AssistButton** next to the **Lot No.** field. The **Lot No. List** window appears. Here you can see the lot numbers, and the lot with the earliest expiration date is the first in the list. This is how the program select the lot numbers according to the expiration date using FEFO method.

![FIGURE 6.29 THE LOT WITH THE EARLIER EXPIRATION DATE IS FIRST IN THE LIST](image2)

5. In the **Lot No.** field for each line check the value in the **Lot No.** field for the items to be shipped. As a result, there are two lines of the Take action types with LOT-006 and LOT-007 in the **Lot No.** field, and the two lines of the Place type with LOT-006 and LOT-007 in the **Lot No.** field.
6. Check the values in the **Zone Code** and **Bin Code** fields for each line:

<table>
<thead>
<tr>
<th>Action Type</th>
<th>Zone Code</th>
<th>Bin Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take</td>
<td>PICK</td>
<td>W-04-0001</td>
</tr>
<tr>
<td>Place</td>
<td>SHIP</td>
<td>W-09-0001</td>
</tr>
</tbody>
</table>

7. Fill values in the **Qty. to Handle** field for each line and on the Action Pane, click **Register Pick** to register the created warehouse pick. After the pick is registered, your shipment lines are updated.

To finish the scenario, you must post the shipment.

1. In the Navigation Pane, click **Warehouse Shipments**. Open the warehouse shipment you created.

2. To verify the item tracking information, on the lines, click **Actions, Line, Item Tracking Lines**. There is a line for each lot number. Close the **Item Tracking Lines** window.

3. On the Action Pane, click **Post Shipment**, and then select **Ship and Invoice**. Your shipment is now posted as shipped and invoiced.
Lab 6.1 - Item Tracking with WMS

In this lab, you will practice working with items set up for item tracking in Warehouse Management Systems.

Scenario

Cronus customer 01121212, Spotsmeyer's Furnishings, has ordered 10 units of item 80216-T, Ethernet Cable, with two different numbers of lot series. You can buy cables of two different sets from vendor 01905283 Mundersand Corporation.

It is necessary to add the item tracking information into the warehouse history journals when registering the items as received and shipped.

Challenge Yourself!

1. Set up item tracking information.
2. Create a sales order, a purchase order and a warehouse shipment.
3. Create and register a warehouse pick.
4. Post the shipment.

Need a Little Help?

1. Set up items to instruct the program to require item tracking information.
2. Create a sales order.
3. Create a purchase order for receiving two lots of items.
4. Create a warehouse shipment. Create and register a warehouse pick.
5. Post the shipment.

Step by Step

Set up items for using item tracking information

1. In the Navigation Pane, click Reference Data, Items. Open the item card for item 80216-T, Ethernet Cable, and expand the Item Tracking FastTab.
2. Click the AssistButton next to the Item Tracking Code field, and in the item tracking code list, click Advanced to open the Item Tracking Code window. Select LOTALL and click Actions, Edit.
3. Expand the Lot No. FastTab, and select the Lot Warehouse Tracking check box. Close the Item Tracking Codes Card and Item Tracking Codes windows.
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Create a sales order

1. In the Navigation Pane, click **Home, Sales Orders**. Click **New** to create a new sales order.

2. In the **Sell-to Customer No.** field, enter 01121212.
   In the **External Document No.** field, enter 01121212.
   In the **Shipping** FastTab, in the **Location Code** field, change the Yellow location to White.

3. On the sales line, in the **Type** field, select Item.
   In the **No.** field, select 80216-T.
   In the **Quantity** field, enter 10. If the **Check Availability** window appears, click **Yes**.
   Leave the value in the **Unit Price Excl. VAT** field as is (for practicing purposes).


5. To create the warehouse shipment, click **Actions, Functions, Create Whse. Shipment**. The created warehouse shipment appears.

Create a purchase order for receiving two lots of items.

1. On the Activities part of the Home page, click **New Purchase Order** to create a new purchase order.

2. In the **Buy-from Vendor No.** field, enter 01905283.
   In the **Vendor Invoice No.** field, enter 01905283.
   On the Shipping FastTab, in the **Location Code** field, select the White location.

3. On the purchase line, in the **Type** field, select **Item**.
   In the **No.** field, select 80216-T.
   In the **Quantity** field, enter 10.
   Leave the value in the **Direct Unit Cost** field as is (for practicing purposes).


5. On the Activities part of the Home page, click **New Whse. Receipt** to create a new receipt.

6. In the **Location Code** field, select the White location. Click **Get Source Documents**, and then select the purchase order just created.
   Click **OK**, and the lines from the purchase order are copied to the receipt.

7. On the receipt line, click **Actions, Line, Item Tracking Lines**.

8. Create two lines. For each line, in the **Quantity (Base)** field, enter 5 and click **Actions, Functions, Assign Lot No.**, and then confirm by clicking **OK**.

9. Complete the receipt of the items by clicking **Post Receipt** on the Action Pane. Confirm the posting of the receipt.

10. On the Activities part of the Home page, click **Put-aways - All**, and then browse to the put-away just created.

11. On the Action Pane, click **Register Put-Away** to register the created put-away.
Create a warehouse shipment. Create and register a warehouse pick.

1. In the Navigation Pane, click **Home, Warehouse Shipments**. Open the warehouse shipment just created.
2. In the shipment document, click **Create Pick**. A pick activity is created.
3. On the Activities part of the Home page, click **Picks - All**. Open the pick just created.
4. For each line, change the value in the **Qty. to Handle** field from 0 to 5, and then on the lines, click **Actions, Functions, Split Line**.
5. In the **Lot No.** field for each line, enter the serial numbers for the items to be shipped (click the **AssistButton** next to the **Lot No.** field, and select the number). As a result, there are two lines of the Take action types with LOT0001 in the **Lot No.** field, and the two lines of the Place type with LOT0002 in the **Lot No.** field.
6. Check the values in the **Zone Code** and **Bin Code** fields for each line:

<table>
<thead>
<tr>
<th>Action Type</th>
<th>Zone Code</th>
<th>Bin Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take</td>
<td>PICK</td>
<td>W-03-0001</td>
</tr>
<tr>
<td>Place</td>
<td>SHIP</td>
<td>W-09-0001</td>
</tr>
</tbody>
</table>

7. On the Action Pane, click **Register Pick** to register the created warehouse pick. After the pick is registered, the shipment lines are updated.

Post the shipment

1. In the Navigation Pane, click **Home, Warehouse Shipments**. Open the warehouse shipment just created.
2. To verify the item tracking information, on the lines, click **Actions, Line, Item Tracking Lines**. There is a line for each lot number. Close the **Item Tracking Lines** window.
3. Click **Post Shipment**, and then select **Ship and Invoice**. The shipment is now posted as shipped and invoiced.
Summary

The item tracking functionality helps to track items in different business situations. The functionality is based on the lot and serial numbers of the items. By using these numbers, items can be easily tracked when received, shipped, and moved around the warehouse.

Traceability of serial/lot numbers is important for the effective item tracking and a requirement in certain industries. The item tracking functionality introduces improvements and new features for gathering item-tracking information in the program.

New advanced search functions help you track an item's current position anywhere in the internal or external supply chain. This includes information about how it got there and where it is going.
Test Your Knowledge

1. How is the program instructed to require item tracking information in warehouse processes for items using the item tracking code SNALL?

2. Where is adding tracking information specified, when registering the items as received?

3. Where are the number series selected that are used by the program to automatically assign consecutive serial numbers to an item?
4. Which option must be selected to track items with lot serial numbers?


5. An item-tracked item is to be sold. Warehouse item tracking is activated. True or False: Item tracking information can be assigned in the warehouse shipment document.


6. Which items have priority when picking according to FEFO method?
Quick Interaction: Lessons Learned

Take a moment and write down three Key Points you have learned from this chapter

1. 

2. 

3. 

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Chapter 6: Item Tracking Within Warehouse Management Systems

Solutions

Test Your Knowledge

1. How is the program instructed to require item tracking information in warehouse processes for items using the item tracking code SNALL?

   MODEL ANSWER:

   On the item tracking code card for code SNALL, select the SN Warehouse Tracking check box on the Serial No. FastTab.

2. Where is adding tracking information specified, when registering the items as received?

   MODEL ANSWER:

   Options about whether or not to add tracking information are specified on the location card.

3. Where are the number series selected that are used by the program to automatically assign consecutive serial numbers to an item?

   MODEL ANSWER:

   The number series are selected in the Serial Nos. field on the Item Tracking FastTab of the item card.

4. Which option must be selected to track items with lot serial numbers?

   MODEL ANSWER:

   The Lot Warehouse Tracking check box in the Item Tracking Code window must be selected.

5. An item-tracked item is to be sold. Warehouse item tracking is activated. True or False: Item tracking information can be assigned in the warehouse shipment document.

   MODEL ANSWER:

   False. The item tracking information must be assigned in the pick document.

6. Which items have priority when picking according to FEFO method?

   MODEL ANSWER:

   Items with the earliest expiration dates have priority to be picked first.