essential

Warehouse
functionalities

WAREHOUSE Webinar Q/A

Thank you to all the attendees of the Essential Warehouse Webinar on October 26. Presented here are the questions that were submitted by attendees and responses from our team. We look forward to presenting future webinars to announce new features, functionalities and covering best practices in R2.

1. **What is a 'container' and how does it work within R2?**

   The user can scan the Container ID on the FILL ITEM screen before scanning the items. Containers refer to the physical cases in which the user pack the equipment. The order may be dispatched (shipped) by containers and container tags may be printed. If there are 10 containers, R2 automatically prints on the tags container numbers, 1 of 10 thru 10 of 10. In addition, the Equipment Delivery Receipt may be formatted to include the container ID associated with each item

2. **Can you please go into further detail of an Event and a Project and what are the key differences?**

   A Project is at the highest level of grouping information in R2. A project is not an order in itself but may contain one or many events and/or orders. For example, a customer may be running an ad campaign over a two-year period as a project to increase revenue for 2017 & 2018. In this project, the customer may have several events and hundreds of orders. The Project could be labeled 2017/2018 Ad Campaign. An Event could be one of several actual events that occurred during the ad campaign. The events will be tagged with the projects for reporting and analysis purposes. During each event the customer may have several orders and these orders may be tagged with its associated event and/or project. So, the Event is the second layer of group where all the actual orders are grouped

   In the Intelligent return, R2 will look for the project grouping or the event grouping information on the order and use this information to make decision about the item being returned.

3. **Being able to return multiple orders is nice but It would be more beneficial to be able to pull and fill multiple orders on a "dispatch sheet" or pick sheet. Does R2 have this capability?**

1) The Pick Sheet: R2 does have several types of Pick Sheet that can be printed to guide the warehouse team to pull the equipment from the warehouse. R2 contains Event Pick Sheet to print several orders as once under the same event. Pick sheet can also be generated for multiple unrelated orders by tagging them from the list of reservations using the Pick Order icon in the warehouse. Once these orders are tagged the Pick Sheet may be printed by Detail/Order, Order/Department, Department/Order or by Summary.

2) Batch Filling: Batch filling is available in the warehouse module. This screen allows the user to select an order or an event to batch scan the equipment. Keep in mind that the Event could have one or multiple orders. Once the scanning is completed, R2 will prompt the user with the choice to ship the equipment or not.

3) Scan to File: The user also has the option to scan the barcodes to a TEXT file, save it and browse for the file in the Prep task. This will fill the order by filling the item from the TEXT file.

4) The Warehouse App: R2 has a companion warehouse app for mobile devices. This app provide the functionalities for prepping, shipping and returning equipment both in batch scanning and the regular warehouse tasks.

4. **Is the form of the Pick List available someplace?**

R2 forms are located at
http://r2docs.unibiz.com/New_installation_docs/FormsConversions/index.html
In addition, you make contact our project management team to assist you with customizing your forms.

5. **How did you get the audio cue when scanning? One for Successful scan, one for Non Successful scan?**

Audio cues are setup in your system default. Open your system default module by selecting start menu > Mantra > Default from the down-down menu

a – Enter your admin username and password
b – Use the % in the search
c – Highlight SYSTEM DEFAULT and select EDIT from the menu on the left
d – Open the bottom left of the GENERAL tab fo the default menu and you will find SOUND & COLOR SETUP for Messages
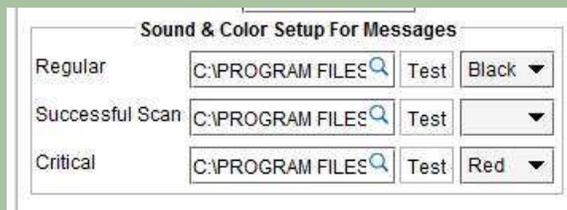
e- Selecting the magnifying glass will allow to browse for a wave file. You can select a WAV file from Windows > Media. You may select the Homer (Simpson) WAV file saved in the C:\Program Files\Mantra\Good-Homer. You can also use the Bad-Homer file. Once selected you may select the test icon to hear your selection.

6. **Where can I find a recording of the webinar?**

   This Webinar as well as past webinars are available for streaming on our website at http://www.unibiz.com/ubs/ubs-blog.html.

7. **When doing multi-order returns, how does R2 know which orders to return non-serial items to?**

   The non-serial items may be returned per line by entering the quantity returned. Each line item is referenced with the ORDER number.   The User may return the non-serial item on the order line they want to return the quantity. The user may also enter the NON-SERIAL product ID in the ENTER ID window and R2 will return the quantity entered in the QUANTITY BOX. R2 will favor to return the item to the partially return orders first. If they are all full orders R2 will return the NON-SERIAL item based on how the ORDER IDs are sorted in the ORDER LIST. The NON-SERIAL items will return on the order at the top of the list first; the order in second position next and the series goes on until all have been returned. During the scanning you may change the order of the list.

8. **How do departments work, are they tied to the department tag on each individual item or are they organized in section when building the order in account view?**

   Departments on the items are user to sort order for the picklist and schedules. Departments in Intelligent Returns must be selected on the default tab in the order or on the event. After the user search for the event orders in the Intelligent Return screen Department may be used as a filter to isolate the orders identified with the department selected

9. **We have never used the Pick List because I do not like that it does not display our items in the order that they are located on the order in Account, therefor the person prepping can't tell what items are associated with each other, or should go together in a case. Is there a way to have it print in that order?**

   The picklist will print by order when BY ORDER is selected in the FORMAT box on the PICK LIST print dialogue box. Also note that additional print filters are available in the PRINT box. By checking these PRINT filters, R2 will include them in the PICK LIST print.

10. **If two items are on separate events and different project ID's, will it still swap?**

The auto swap will not work automatically; however, a dialogue box will be open to prompt the user to return the item to its current site inventory OR do nothing.
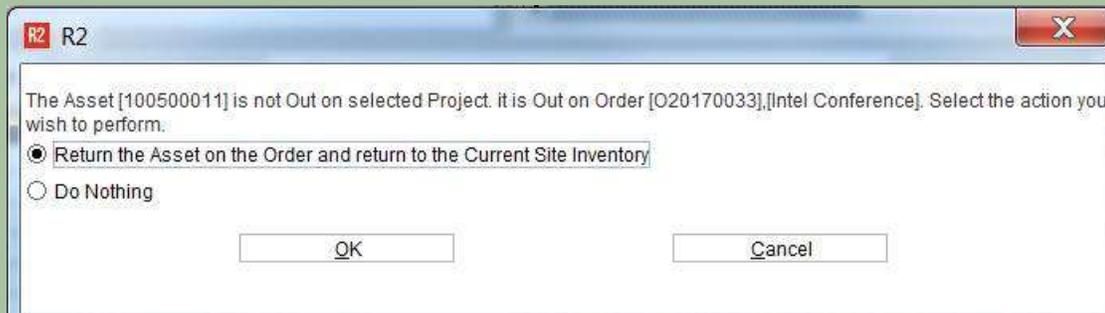
If the swap setting is set to DO NOT AUTO SWAP when the item is on an order that is related by Project, Event or orders with Sub-orders but not on the selected orders, the following dialogue will appear to manually swap, return to site or do nothing. (To select orders with Sub-orders, search by orders and select to LIST ORDERS OF PROJECT)
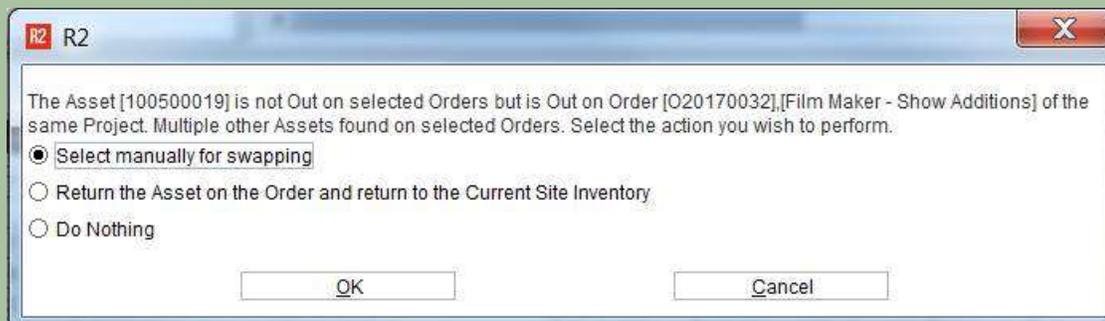
When the item is not related by events or project you can still Swap using the SWAP feature from the bottom of the menu on the left.

11. **We went through the most recent webinar on warehouse. Great refresher thanks. The intelligent return is a pretty cool new feature. How do you take advantage of that feature when building your order in account. The presenter mentioned that we had to have a project. Is that different from a standard reservations?**

You can enter a single stand-alone order number in the ORDER ID field or scan and asset into the ASSET ID field and select OPEN RETURN ORDER. This will take you to the regular return screen. If the order is related to a sub order combination you would select LIST ORDER(S) OF PROJECTS and all the orders related by sub order will appear in the list at the bottom of the screen.