



riteSCAN®

PALLET TRACKING GUIDE

VERSION 6.51.X.X

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1 riteSCAN Pallet Tracking Introduction

1.1 Setting up Pallets and Items

1.1.1 Understanding Pallets

A Pallet in riteSCAN is a collection of stock items from your inventory. Each Pallet is given a unique identifier, specified by the user. Each item on a pallet has all the relevant information (like stock code, lot, serial number, quantity, etc.) to process various transactions in riteSCAN. To set up Pallets in your warehouse(s), use the Pallet Maintenance module or create them on the fly as part of processing transactions in one of the many modules of riteSCAN that utilizes pallet functionality.

1.1.2 Using Pallet Maintenance

The Pallet Maintenance Module allows users to create and edit pallets and pallet items. To start interacting with a Pallet, simply enter a Pallet ID. If the ID exists, the data for that pallet will display on the screen. If the ID does not exist, the system will ask you if you want to create a Pallet. Once you find a valid pallet or choose to create a new pallet, you can begin entering information for the pallet, such as Warehouse, Bin, and Pallet Status or start adding Pallet Items.

Adding pallet items is as easy as clicking the Add Item button. You will be prompted for the information about the pallet item. After you have made all of the edits to the pallet, you can save your changes.

Pallet Maintenance - SYSPRO Administrator

Options

Pallet 1 2 3 4

WH FG 5 Bin 6 Status 7

StockCode	Lot	Serial	Qty	Alternate	Other	Note	Re
A100 8			8	0.8	2.666667		

Post Successful

Save Close

1. The Pallet ID field is where you can scan or enter a Pallet ID for the pallet you would like to enter.
2. Pressing this button will query a list of Pallet ID's that exist in the system allowing you to pick the ID from the list.

3. Pressing this button will generate a new Pallet ID. See the administration guide for more settings surrounding pallet ID generation.
4. Pressing this button will add a new item to the pallet.
5. This is the Warehouse where the pallet is currently held.
6. This is the Bin where the pallet is currently held.
7. This is the status of the pallet.
8. This is a list of items currently held on the pallet.

Pallet Maintenance - SYSPRO Administrator

Options

- Transfer Item
- Edit Item
- Delete Item
- Delete Pallet
- Print
- Stock Take

Warehouse: T Bin: Status: In Inventory

Lot	Serial	Qty	Alternate	Other	Note	Re
A100		8	0.8	2.666667		

Post Successful

Save Close

1. Transfer Item allows you to transfer the selected item to another pallet. The pallets must have the same WH and Bin location.
2. Edit Item allows you to edit the selected item.
3. Delete Item deletes the selected item.
4. Delete Pallet deletes the entire pallet from the system.
5. Print allows you to print labels for each of the pallet items.
6. Stock Take allows you to recount each of the items on the pallet (screenshot below)

Pallet Stock Take - SYSPRO Administrator

Pallet ID: 1, WH: FG, Bin:

	StockCode	Lot	Serial	Qty	Alternate	Other	Note	Rel
▶	LOT100	452		10	10	10	2	
	SER200		BCS0522	0	0	0	4	

Qty

1.1.3 Using Pallet Import

The pallet import utility (PalletImport.exe) allows you to import a formatted csv file and create Pallets and Pallet Items. Run the application (located in the bin directory of the Web Service install directory, <riteSCAN Web Service Install Directory>\bin\PalletImport.exe) and follow the onscreen prompts to import your file. **NOTE: You should run this utility as Administrator by right clicking the executable and selecting the "Run as administrator" option.**

```

C:\Program Files (x86)\riteSOFT\riteSCAN Web Service\bin\PalletImport.exe
1. Import Pallets
2. Import Pallet Items
1
Please enter the path to the pallet db file:
<riteSCAN Web Service Install Directory>\Palletv2.db
C:\Program Files (x86)\riteSOFT\riteSCAN Web Service\Palletv2.db
Connecting to pallet db...
Please make sure the csv is in the following format:
PalletId,CompanyId,PalletStatus,Warehouse,Bin

Please enter the path to the csv file:
C:\Users\garrett.brennan\Documents\Pallet.csv
Reading csv file...
Importing line 1...
Line 1: Pallet already exists.
Would you like to overwrite? (Y/N)
Y
Importing line 2...
Line 2: Pallet already exists.
Would you like to overwrite? (Y/N)
Y
Press any key to exit...

```

1.2 Next Steps

Once you have created Pallets for your operation, the next step is to start using them in the various modules of riteSCAN. Read the sections below to learn more about how you can use pallets in many of the modules of riteSCAN.

2 Using Pallet Tracking in riteSCAN

2.1 Pallet Statuses

When creating a pallet, you will notice that one of the pieces of data associated with a pallet is the Pallet Status. This status allows riteSCAN to validate that the pallet can be used for a specific transaction within riteSCAN. For example, only Pallets that are “In Inventory” can be used in a Warehouse Transfer. Likewise, a pallet that is “In Inventory” could not be used in Receipt from Inspection.

Here are the pallet statuses used in riteSCAN:

- None – These pallets have no status
- In Inventory – These pallets are currently being held in inventory
- In Inspection – These pallets are being held in Inspection (not WIP Inspection)
- Transferred Out – These pallets have been transferred out using Warehouse Transfer
- In Transit – These pallets have been transferred out using Goods in Transit Out
- Staged for WIP – These pallets have been issued to a job
- In WIP Inspection – These pallets are being held in WIP Inspection
- Staged for Order – These pallets have items for an order that has yet to be picked
- Picked for Order – These pallets have items that have been picked for an order

2.2 Single Pallet Mode

The screenshot shows the 'Warehouse Transfer - SYSPRO Administrator' dialog box. The 'Pallets' dropdown menu is open, showing options: 'None', 'Single' (selected), and 'To / From'. The 'Status' section has radio buttons for 'ate' (selected), 'Out', and 'In'. Below this are fields for 'Qty' and 'Rev / Rel'. The 'From' section includes 'WH' and 'Bin' dropdowns, and a 'Lot' field. The 'To' section also includes 'WH' and 'Bin' dropdowns. There are 'Reference' and 'Note' text fields at the bottom. At the very bottom are 'Post' and 'Close' buttons, and a small '0' in the bottom right corner.

In Single Pallet mode, transactions are performed for the entire pallet. In the example above, Warehouse Transfer is displayed. When using Single Pallet Mode in Warehouse Transfer all items on the pallet will be transferred from their current location to the new destination. In Single Pallet Mode the pallet must be in the appropriate status according to the module with which it is being processed.

The screenshot shows the 'Warehouse Transfer - SYSPRO Administrator' dialog box. It has two tabs: 'Serials' and 'Options'. The 'Options' tab is active, showing radio buttons for 'Immediate' (selected), 'Out', and 'In'. Below these is a 'Pallet #' field with a red circle containing the number '1' next to it. To the right of the 'Pallet #' field is a 'Pallet Query' button with a magnifying glass icon and a red circle containing the number '2'. Below the 'Pallet #' field are 'Qty' and 'Rev / Rel' fields. The 'From' section contains 'WH', 'Bin', and 'Lot' fields, each with a magnifying glass icon. The 'To' section contains 'WH' and 'Bin' fields, each with a magnifying glass icon. Below these are 'Reference' and 'Note' fields. At the bottom are 'Post' and 'Close' buttons. A small '0' is visible in the bottom right corner.

1. The Pallet ID field is where you can scan or enter a Pallet ID to be used as part of a transaction. In Single Pallet Mode the pallet must already exist in the system.
2. The Pallet Query Button will display a list of items that are currently on the pallet entered into the Pallet ID field.

2.3 To / From Pallet Mode

The screenshot shows the 'Warehouse Transfer - SYSPRO Administrator' dialog box with the 'Options' tab active. A dropdown menu is open, showing options: 'None', 'Single', and 'To / From' (which is selected). The 'Pallet #' field is empty. The 'Pallet Query' button is visible. The 'Qty' and 'Rev / Rel' fields are present. The 'From' section contains 'WH', 'Bin', and 'Lot' fields, each with a magnifying glass icon. The 'To' section contains 'WH' and 'Bin' fields, each with a magnifying glass icon. Below these are 'Reference' and 'Note' fields. At the bottom are 'Post' and 'Close' buttons. A small '0' is visible in the bottom right corner.

In To / From Pallet Mode, transactions are performed as they normally are in riteSCAN with the added ability to optionally specify pallets from which inventory is removed and/or onto which inventory is added. In To / From Pallet mode the "From" pallet must contain enough inventory to satisfy the

transaction and must be in the appropriate status. Likewise, the “To” pallet must be in the appropriate status. If you enter a Pallet ID that does not exist into the “To” pallet field, you will be asked if you would like to create the pallet.

1. The Pallets button will display a dialog where you can specify both a “From” and a “To” pallet.

1. The pallet entered into this field will have items removed as part of the transaction.
2. Pressing this button will query a list of Pallet ID's that exist in the system allowing you to pick the ID from the list.
3. The pallet entered into this field will have items added as part of the transaction. In addition, if this pallet does not exist you will be asked if you would like to create the pallet when posting.
4. Pressing this button will query a list of Pallet ID's that exist in the system allowing you to pick the ID from the list.
5. Pressing this button will generate a new Pallet ID. See the administration guide for more settings surrounding pallet ID generation.

2.4 Multiple Pallet Mode (Job Receipt only)

Multiple Pallet Mode allows the user to specify multiple pallets and distribute the quantity being

The screenshot shows the 'Job Receipt - SYSPRO Administrator' window. The 'Options' menu is open, and the 'Pallets' option is selected, which has opened a sub-menu with 'None', 'To / From', and 'Multiple' options. The 'Multiple' option is currently selected. The main form contains fields for 'Bin', 'Lot', 'Concession', 'Reference', 'Notation', 'Job Complete' (checkbox), 'Cost Basis' (set to 'Current'), and 'Receipt Cost'. At the bottom are 'Post' and 'Close' buttons. A small '0' is visible in the bottom right corner of the window.

received across those pallets. In this mode the user will not be prompted for pallet information until he/she hits post.

The screenshot shows a dialog box for Multiple Pallet Mode. It contains the following elements with numbered callouts: 1. 'From Pallet' text box; 2. Search icon; 3. 'Quantity Remaining: 10' label; 4. 'Generate ID' button; 5. 'Pallet ID' text box; 6. 'Qty' text box; 7. 'Add >>' button; 8. '<< Remove' button; 9. Large empty list area; 10. 'OK' button; 11. 'Cancel' button.

1. This is where the user can specify a pallet to remove materials from (works like to / from mode for Job Receipt).
2. Pressing this button allows the user to query pallets currently in the pallet tracking system.
3. This label shows the remaining quantity to distribute across pallets
4. Pressing this button will generate a new Pallet ID. See the administration guide for more settings surrounding pallet ID generation.
5. The pallet entered into this field will have items added as part of the transaction. In addition, if this pallet does not exist you will be asked if you would like to create the pallet when posting.
6. The quantity entered here will be distributed to the pallet entered in the previous field.
7. Pressing this button will add the entered pallet and quantity.

8. Pressing this button will remove the selected pallet and quantity from the list.
9. This list will show the pallets and quantities already entered.
10. Pressing this button will accept the quantities entered.
11. Pressing this button will cancel the process. All quantities entered will be lost.

2.5 riteSCAN Modules

2.5.1 Warehouse Transfer

Single Pallet Mode:

Single Pallet Mode for Warehouse Transfer allows you to transfer all of the stock on a pallet from its current Warehouse (and Bin) to a different Warehouse (and Bin).

To / From Pallet Mode:

To / From Pallet Mode for Warehouse Transfer allows you to optionally select a pallet to pull inventory from and/or optionally select a pallet onto which the inventory will be placed.

2.5.2 Bin Transfer

Single Pallet Mode:

Single Pallet Mode for Bin Transfer allows you to transfer all of the stock on a pallet from its current bin to another bin.

To / From Pallet Mode:

To / From Pallet Mode for Bin Transfer allows you to optionally select a pallet to pull inventory from and/or optionally select a pallet onto which the inventory will be placed.

2.5.3 Stock Take

Single Pallet Mode:

Single Pallet Mode for Stock Take allows you to count the items on a pallet with one transaction instead of having to count each item individually.

To / From Pallet Mode:

To / From Pallet Mode is not supported in Stock Take.

2.5.4 Expense Issue

Single Pallet Mode:

Single Pallet Mode for Expense Issue allows you to expense all items on a pallet at one time.

To / From Pallet Mode:

To / From Pallet Mode for Expense Issues allows you to optionally take items off a pallet that is held in inventory and/or optionally place them on a pallet that is expensed.

2.5.5 Misc. Receipt

Single Pallet Mode:

Single Pallet Mode for Misc. Receipt allows you to receive all items on a pallet into inventory.

To / From Pallet Mode:

To / From Pallet Mode for Misc. Receipt allows you to optionally take items from a pallet that has been expensed and/or optionally receive the items onto a pallet held in inventory.

2.5.6 Goods in Transit Out

Single Pallet Mode:

Single Pallet Mode for Goods in Transit Out allows you to transfer all of the items on a pallet out of inventory to be received at a later date.

To / From Pallet Mode:

To / From Pallet Mode for Goods in Transit Out allows you to optionally take items from a pallet that is held in inventory and/or optionally place the items on a pallet that has been transferred out.

2.5.7 Goods in Transit In

Single Pallet Mode:

Single Pallet Mode for Goods in Transit In allows you to receive all the goods from a pallet into inventory when they are received at the destination warehouse.

To / From Pallet Mode:

To / From Pallet Mode for Goods in Transit In allows you to optionally remove items from a pallet that has been transferred out and/or optionally place those items on a pallet that is held in inventory.

2.5.8 Sales Order Picking

Single Pallet Mode:

Single Pallet Mode for Sales Order Picking allows you to pick all the goods on a pallet for a sales order.

To / From Pallet Mode:

To / From Pallet Mode for Sales Order Picking allows you to optionally remove items from a pallet that is held in inventory or staged for an order and/or optionally place those items on a pallet that is picked for an order.

2.5.9 Purchase Order Receipt and Purchase Order Receipt All

Single Pallet Mode:

Single Pallet Mode is not supported in Purchase Order Receipt or Purchase Order Receipt All.

To / From Pallet Mode:

To / From Pallet Mode for Purchase Order Receipts allows you to optionally receive goods onto a pallet that is held in Inventory. In the case of Receipt to Inspection, the items must be placed onto a pallet that has no other items.

Note: There is no need to specify a “From” pallet because the goods are being received into the system for the first time.

2.5.10 Order Picking

Single Pallet Mode:

Single Pallet Mode for Order Picking allows you to pick all the goods on a pallet for an order.

To / From Pallet Mode:

To / From Pallet Mode for Order Picking allows you to optionally remove items from a pallet that is held in inventory or staged for an order and/or optionally place those items on a pallet that is picked for an order.

2.5.11 Job Issue

Single Pallet Mode:

Single Pallet Mode for Job Issue allows you to issue all of the materials on a pallet to a job.

To / From Pallet Mode:

To / From Pallet Mode for Job Issue allows you to optionally remove items from a pallet that is held in inventory and/or optionally place those items on a pallet that is Staged for WIP.

2.5.12 Job Receipt

Single Pallet Mode:

Single Pallet Mode is not supported in Job Receipt.

To / From Pallet Mode:

To / From Pallet Mode for Job Receipt allows you to optionally remove items from a pallet that is Staged for WIP and/or optionally place the finished goods onto a pallet that is held in inventory. In the case of WIP Receipt into Inspection, the finished goods must be placed onto a pallet that has no other items.

Note: The “From Pallet” is always fully depleted, regardless of which materials (and quantities of those materials) are needed for the finished goods according to the bill of materials.

3 Additional Help and Support

If you need additional assistance, we are here to help! Visit our support portal or contact our support team.

- Product Downloads, Documentation, Knowledge Base, and How-To Articles are available at <https://ritesoft.freshdesk.com/support/home>

- Email our support team at ritescan@ritesoft.com or call us at 1-320-252-6830, ext. 885 or 1-866-580-7483.