



RTS – Rental Tracking Solution:

Pick and Ship an Order

RTS provides for managing rental item orders provided to Customers. These customers can be external or internal to the company. The process involves 7 essential steps (outside of the initial setup and configuration of RTS):

- 1) ***Item “Masters” must first be set up within the application. These can be imported or added manually within the Master Function.***
- 2) ***Next, individual Items, Tools, or Equipment are then added to the database. Items also can be imported or added manually within the Item Function.***
- 3) ***From the Customer Function..... ‘Customers’, whether persons, places, projects or jobs, etc., are then added to the database. The definition of “Customer” is flexible, dependent really upon to whom, what or where items will be supplied.***
- 4) ***Orders are entered from the Order Function***
- 5) ***Items are then Shipped, based upon Pick Lists issued and items Picked, via the SHIP or Order Pick & Ship Functions. Pick and Ship can be via a mobile handheld terminal (real time, wireless network connection), or from the SHIP Function on the RTS application.***

6) Items are received back into inventory from the CHECK IN Function.

7) An INVOICE Function is available, once items have shipped.

This document addresses Step 5: PICKING and SHIPPING Orders.

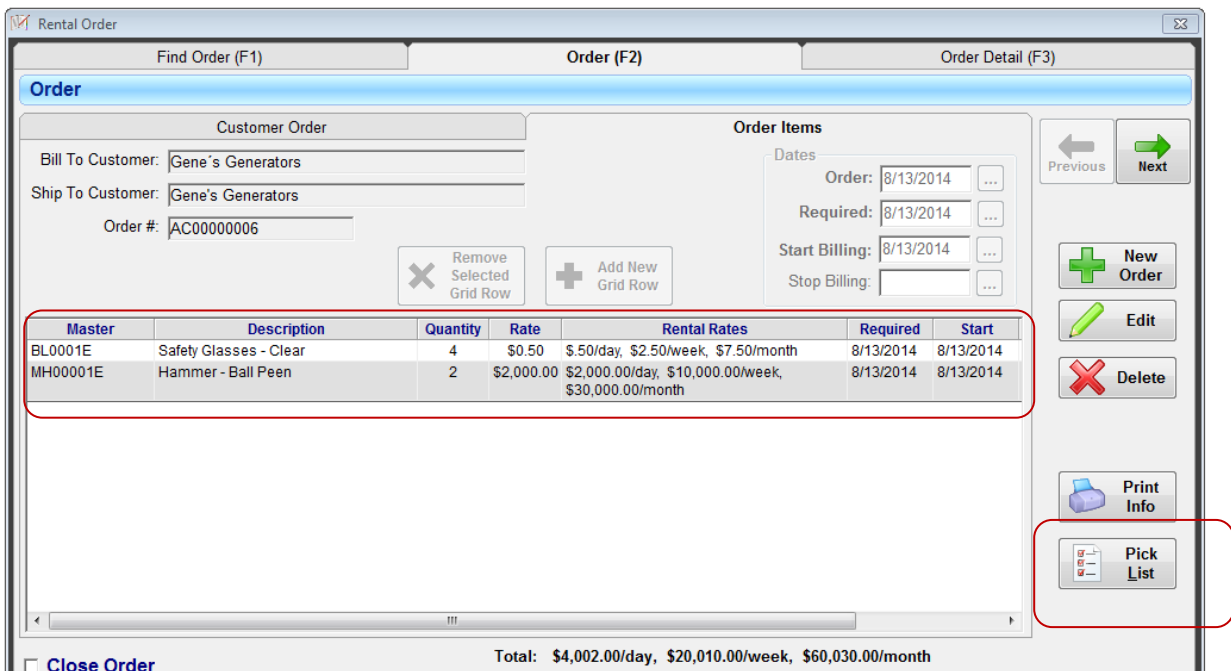
RTS Order Picking:

Once a Customer is set up within the system, and an Order is set up for that Customer, Items can be picked for Shipping:

Select the Order function:

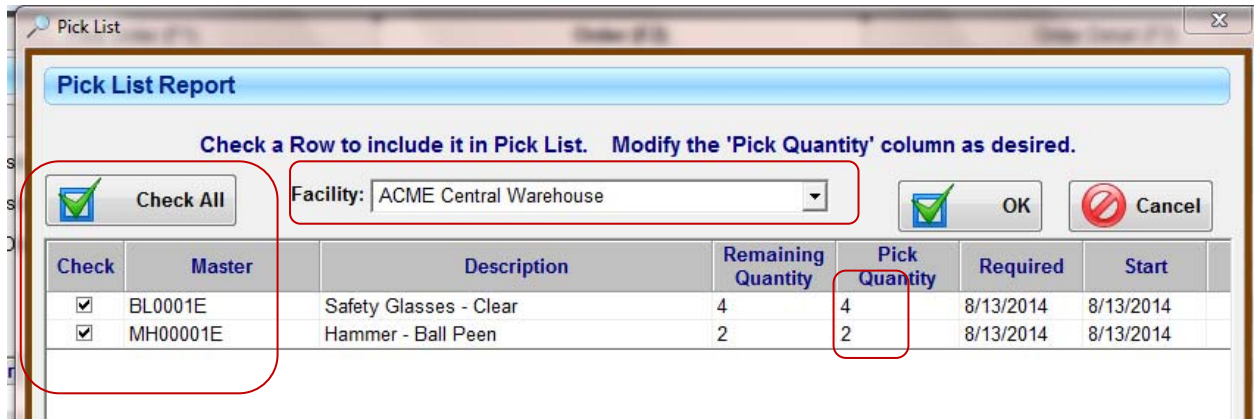


Select Order (F2) | Select "Order Items" tab to view Order Detail | Select Pick List:

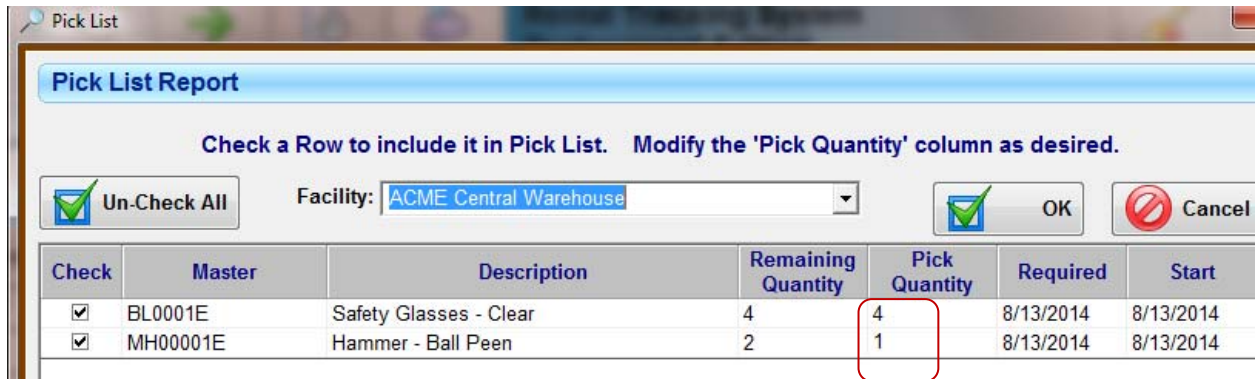


Select the Facility from which the item(s) is to be picked | Check the items that are to be picked
- all items, or only specific items.

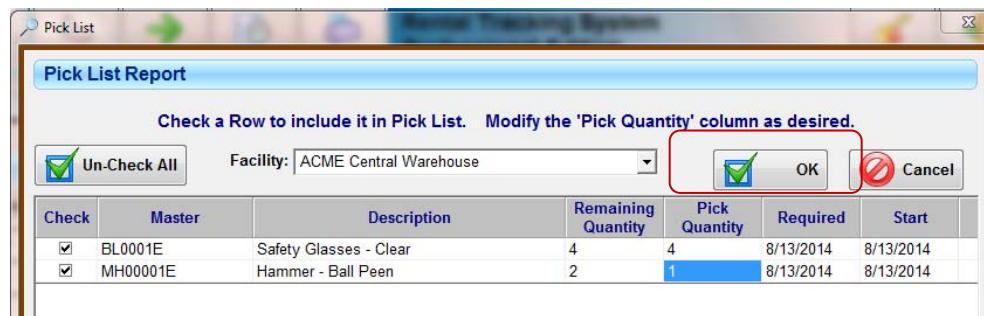
(as the user, you can select which items may be picked now.... and leave others for another time, depending upon what the order fulfillment requires)



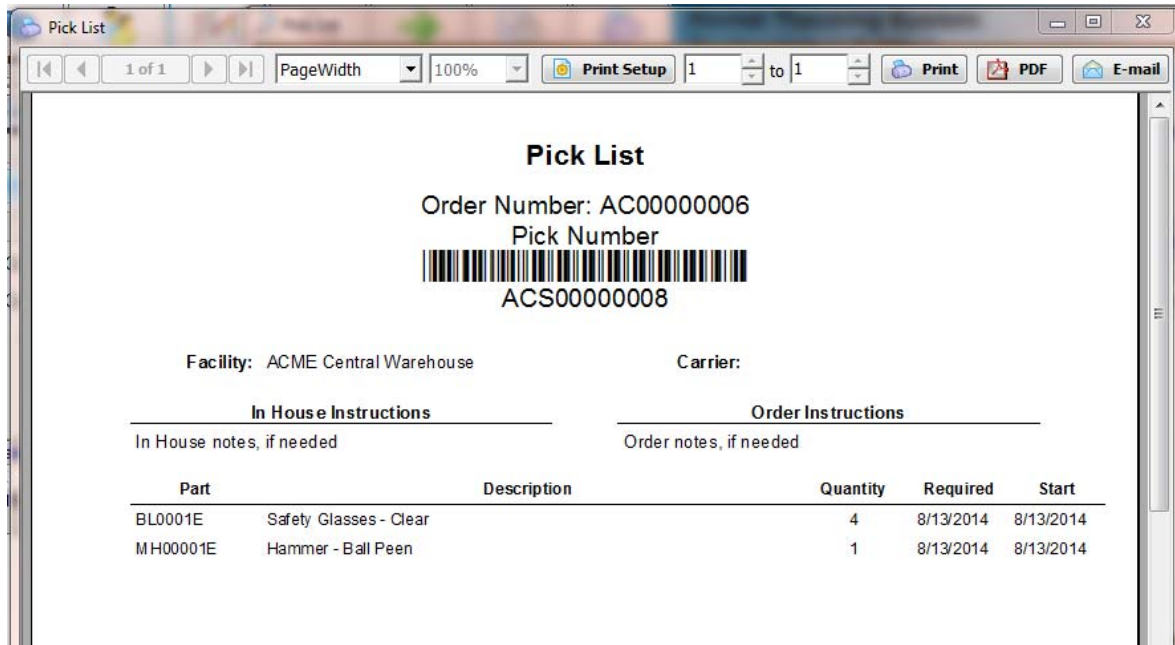
Pick quantities may also be adjusted if necessary:



Select the OK Button:



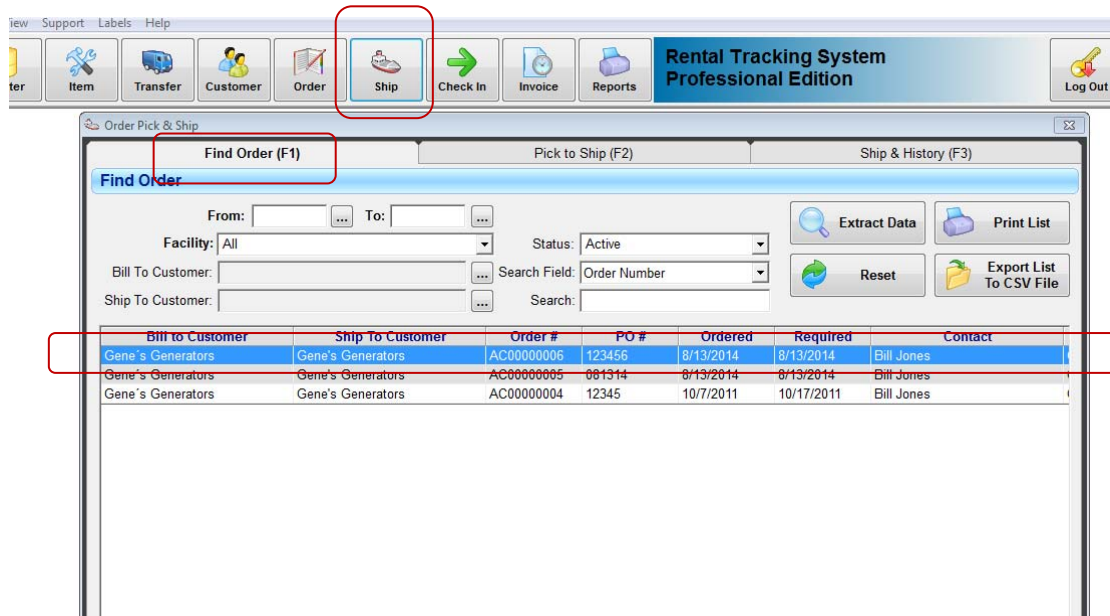
A Pick List will then be printed (Print to hardcopy, pdf or email):



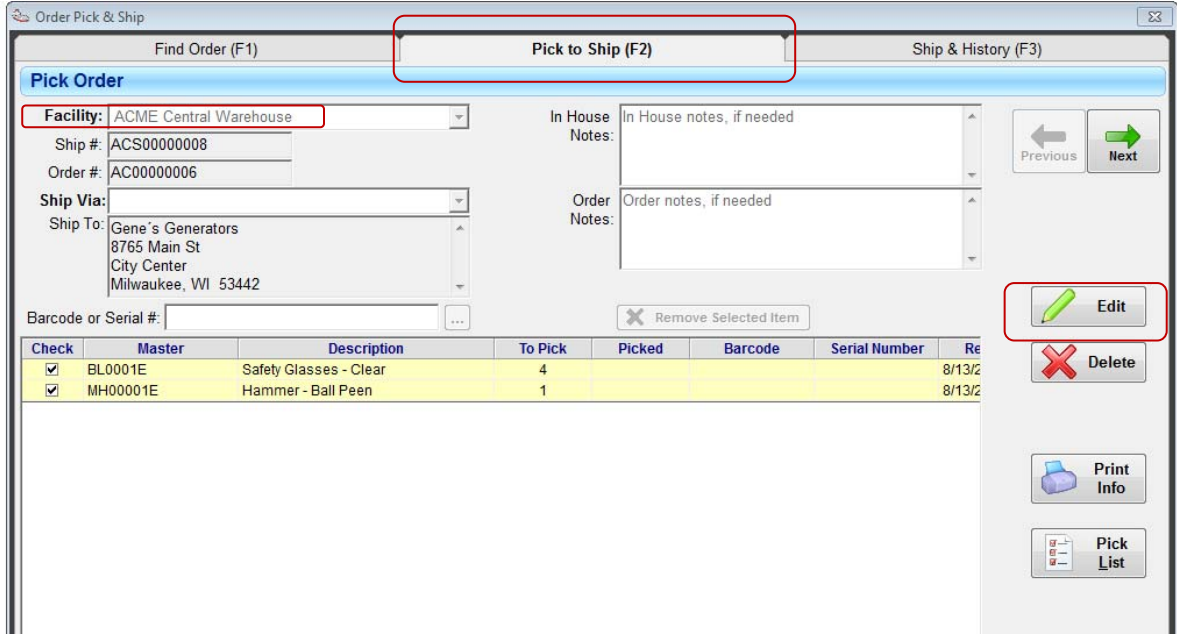
The order can be picked using the main RTS PC application or the mobile, handheld data terminal:

From the RTS PC App:

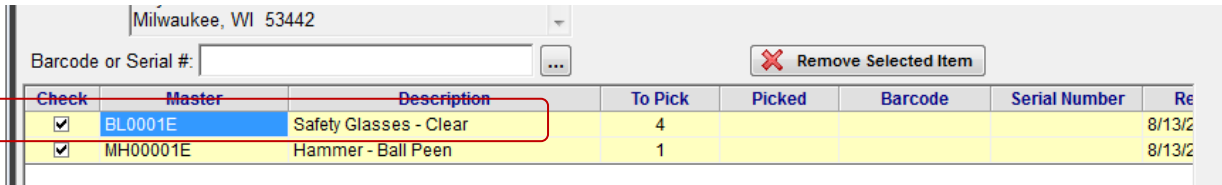
Select the Ship Function | Select Find Order (F1) | Select the Order to Pick



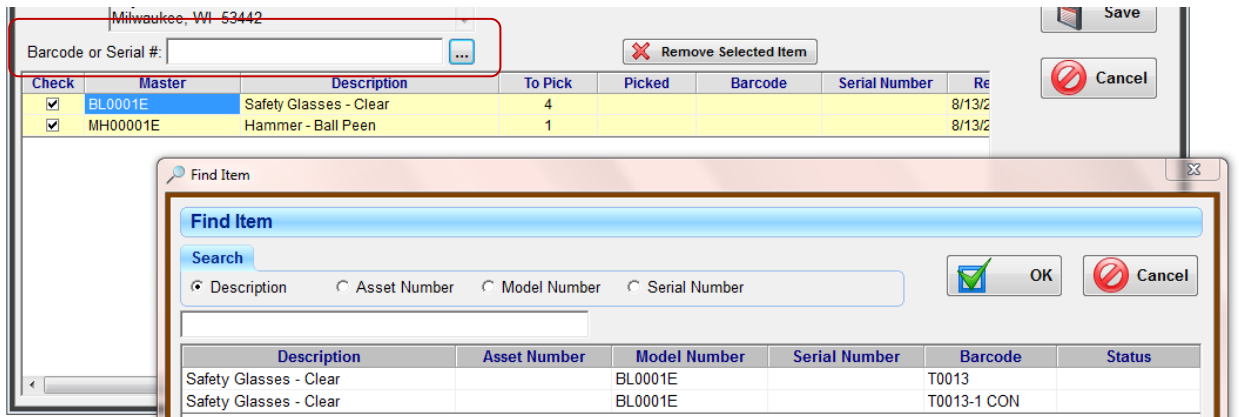
Select Pick to Ship (F2) | Select Edit | Confirm the Facility from which you are picking (this can vary with each item picked):



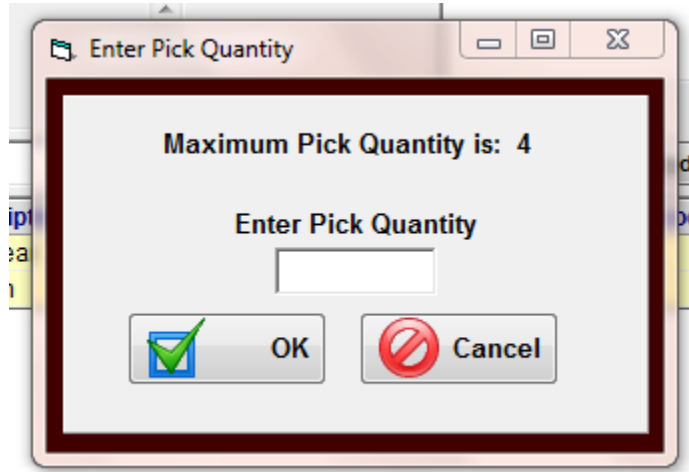
Select the item Master in the row to be picked



Scan, Enter or Select the Barcode or Serial Number of the item(s) picked:



If this is a 'binned' or 'quantity' item, enter the quantity picked:



Once picked, the item quantity and barcode will display in the Pick Screen:

Check	Master	Description	To Pick	Picked	Barcode	Serial Number	Re
<input checked="" type="checkbox"/>	BL0001E	Safety Glasses - Clear	4	4			8/13/2
<input checked="" type="checkbox"/>	MH00001E	Hammer - Ball Peen	1	4	T0013		8/13/2

When finished Picking, enter Ship Via (from screen drop down); Enter any notes if needed.

Select Save when completed

Check	Master	Description	To Pick	Picked	Barcode	Serial Number	Re
<input checked="" type="checkbox"/>	BL0001E	Safety Glasses - Clear	4	4			8/13/2
<input checked="" type="checkbox"/>	MH00001E	Hammer - Ball Peen	1	4	T0013		8/13/2

To Ship the Order:

Select Ship | Select Find Order (F1)

Select the Order | Select Ship & History (F3)

Enter the Shipped date | Select Ship

Order Pick & Ship

Find Order (F1) | Pick to Ship (F2) | **Ship & History (F3)**

Pick: ACS00000008

Ship #: ACS00000008 | **Shipped:** [] | Ship Via: Federal Express
 Order #: AC00000006 | Ship To: Gene's Generators
 8765 Main St
 City Center
 Milwaukee, WI 53442
 Attn: Bill Jones
 Phone: 123-456-7890
 Fax: 123-456-0987
 Email: bjones@yahoo.net

In House Notes: In House notes, if needed
 Order Notes: Order notes, if needed

Master	Description	To Pick	Picked	Barcode	Serial Number	Required	Start
BL0001E	Safety Glasses - Clear	4	4			8/13/2014	
MH00001E	Hammer - Ball Peen	1	0	T0013		8/13/2014	

Buttons: Previous Shipme..., Next Shipme..., **Ship**, Print

Print a Shipping Ticket if required:



Shipping Ticket

ACME Central Warehouse
 442 Central Circle
 Everywhere, WI 55444
 123-456-7890
 234-567-8901

Rental Order #: AC00000006

Shipment Number



ACS00000008

Ship to Customer
 Gene's Generators
 8765 Main St
 City Center
 Milwaukee, WI 53442

PO #: 123456
 Ship Via: Federal Express

Contact: Bill Jones
Phone: 123-456-7890
Fax: 123-456-0987
Email: bjones@yahoo.net

Instructions: Order notes, if needed

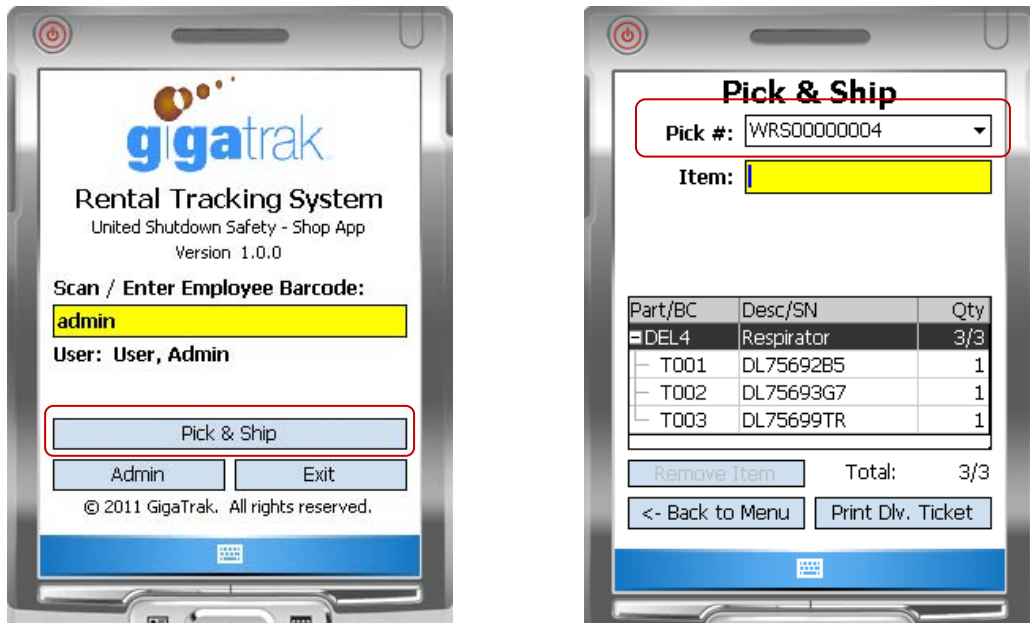
Qty	Description	Required	Tracking #
4	Safety Glasses - Clear	8/13/2014	T0013

The order can be picked using the main RTS PC application or the mobile, handheld data terminal:

Using the mobile Handheld data terminal:

Logon to the Terminal

Select Pick & Ship | Select the Pick # Ticket Number from the Drop Down



Follow the prompts on the screen for picking:

Scan the barcode of each item as they are picked (note - items to be picked are on the pick ticket). If binned or quantity items, also note the quantity picked.

Print a Delivery Ticket if Required.

Handheld system application can vary, and additional functions/features/steps may be available/necessary, depending upon the level of customization.

The mobile data terminal is operated in a 'wireless' network environment, so typically, the connection is live and in real time to the RTS database. However, some versions may require a manual 'synch' selection to initiate the data transfer.