

User Manual

Aptean Food and Beverage ERP

Advanced Warehousing

Product Documentation



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Release notes

Article • 5/27/2026 • 1 min read

To view what's new or changed in each release of the Aptean Advanced Warehousing extension, select the specific release version.

Date	Release version	Description
May 2026	2503.5.0.0	Minor release
March 2026	2503.4.0.0	Stability release
February 2026	2503.3.0.0	Platform release
September 2025	2503.2.0.0	Stability release
August 2025	2503.1.0.0	Stability release
July 2025	2503.0.0.0	Feature release
July 2025	2502.0.0.0	Feature release
May 2025	2501.0.0.0	Feature release
April 2025	2401.3.0.0	Stability release
January 2025	2401.2.0.0	Stability release
August 2024	2401.1.0.0	Stability release
April 2024	2401.0.0.0	Feature release
February 2024	2301.2.0.0	Stability release
December 2023	2301.1.0.0	Stability release
July 2023	1.2.107018.0	Stability Release
May 2023	1.1.97968.0	Stability Release
January 2023	1.0.76685.0	Feature Release



2503.5.0.0

Release Note • 5/27/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Warehousing extension, a subscriber has been added in the *PickReportFiltersHndlngSI75FDW* codeunit to handle the *OnAfterSetCreatePickParameters75FDW* event to allow defaulting the *Per Zone* and *Per Destination* options to *TRUE* during pick creation.



2503.4.0.0

Release Note • 3/25/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
361014	A performance issue occurs when posting warehouse shipments on the Warehouse Shipment page, where each order takes several minutes to post, resulting in longer than expected posting times.



2503.3.0.0

Release Note • 2/27/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Warehousing extension, the following changes have been made to ensure compatibility with Business Central, version 28.

- The *OnBeforePostSourceDocument* event subscriber has been replaced with the *OnBeforePostSourceHeader* event subscriber in the *WhsePostShipmentSubscr75FDW* codeunit due to changes in the base application's *Whse.-Post Shipment* codeunit.
- The *UpdatedPostingAndShipmentDateWithWorkDateForSourceHeader* procedure has been added to the *WarehousePostShipment75FDW* codeunit to handle the new event signature that uses a variant type for the source header.

Note

These changes affect the warehouse shipment posting process when updating posting and shipment dates.



2503.2.0.0

Release Note • 9/1/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
323625	An error occurs when executing the Create Pick action on the Warehouse Shipment page when the combined list of available bin codes exceeds 250 characters.



2503.1.0.0

Release Note • 8/27/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
309540	The system fails to pick bins on the Warehouse Pick page based on the Pick Method Code field value configured on the Sales Order page. This issue occurs when a location has the different Bin Usage Rule Code and Pick Method Code field values on the Pick Bin Usage Rules page.
316145	The system incorrectly updates the Quantity field value on the Warehouse Pick page. This issue occurs when the Pick Usage Rule Code field value is left blank for a bin code on the Bins page. Additionally, the Available Qty. to Take field value is configured on the Bin Contents page for the same lot, while another bin code for that lot has a configured Pick Usage Rule Code field value on the Bins page.



2503.0.0.0

Release Note • 7/30/2025 • 1 min read

Features

With the feature added in this release of the Aptean Advanced Warehousing extension, you can select the code for the pick method in the **Pick Method Code** field on the **Customer Template** page.

UI/UX changes

The **Pick Method Code** field has been added to the **Customer Template** page.



2502.0.0.0

Release Note • 7/2/2025 • 1 min read

Features

With the feature added in this release of the Aptean Advanced Warehousing extension, the system rounds pick quantity value to whole numbers when using non-base units of measure. For more information, see [Set up advanced warehousing](#) and [Create multiple picks for warehouse shipment](#).

Integrations

The Aptean Advanced Warehousing extension has been integrated with the following extensions.

- Aptean [Shop Floor Logistics](#)
- Aptean [Mobile Warehouse Registration](#)

For more information, see [Integrations](#).

UI/UX changes

The **Apply Rounding for Non-Base UoM** toggle has been added to the **Create Multiple Whse. Pick** page.



2501.0.0.0

Release Note • 5/7/2025 • 1 min read

Features

With the feature added in this release of the Aptean Advanced Warehousing extension, you can round pick quantities to whole numbers when using non-base units of measure. For more information, see [Create Multiple Picks for Warehouse Shipment](#).

UI/UX changes

The **Apply Rounding for Non-Base UoM** toggle has been added to the **Advanced Warehousing Setup** and **Whse.- Shipment - Create Pick** pages.



2401.3.0.0

Release Note • 4/25/2025 • 1 min read

Enhancements/Modifications

The translation files for the Swedish (sv-SE) language have been updated with standard texts for better readability.



2401.2.0.0

Release Note • 1/22/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
255019	An error occurs upon executing the Create Pick action on the Warehouse Shipment page, as the system fails to create the pick with the next lot's bin according to FEFO. This issue arises when the system doesn't find the required inventory in the lot selected according to FEFO associated with the bin, which is selected by a combination of the Pick Method Code field value on the Warehouse Shipment page and the Bin Usage Rule Code field value on the Location Card page, as defined on the Pick Bin Usage Rules page.



2401.1.0.0

Release Note • 8/23/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Warehousing extension, modifications have been made to accommodate the following changes:

- Enhanced application interaction: Procedures have been added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a per-company and per-database basis.
- Application area refresh: Updates have been implemented to improve the application area refresh process by integrating a new procedure into the *Enable* codeunit.
- Improved management of install and upgrade code: The *Install* and *Upgrade* codeunits have been updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized license management procedures: The existing license management codeunit has been modified to use centralized license management procedures, further reducing the need for application-specific adjustments.
- Enhancements have been made to update the process within the application to handle the *User Group* and *User Group Permission Set* tables. This change ensures compatibility with current and future versions of Business Central, even when the *User Group* and *User Group Permission Set* tables are deprecated.

! Note

The *User Group* and *User Group Permission Set* tables are deprecated in Business Central, version 25.



2401.0.0.0

Release Note • 4/30/2024 • 2 min read

Features

With the features added in this release of the Aptean Advanced Warehousing extension, you can:

- Set up the pick method to define the pick method rules on the **Advanced Warehousing Setup** page. To know more, see [Advanced Warehousing Setup](#).
- Set up the pick usage rule codes for zones, bins, and locations to manage inventory organization effectively. To know more, see [Define pick usage rule codes](#).
- Manage the selection of items for each line in a document using the pick method codes. To know more, see [Set up pick method codes](#).
- Control pick bin usage rules based on the combination of pick method and bin usage rule code. To know more, see [Set up pick bin usage rules](#).
- Define pick rules for warehouse picks and pick worksheets based on the pick method and pick usage rule code. To know more, see [Pick rules on warehouse picks and pick worksheets](#).

UI/UX changes

The following UI/UX changes have been made in this release:

- The following pages are added:
 - **Pick Method Codes**
 - **Bin Usage Rule Codes**
 - **Pick Bin Usage Rules**
- The **Pick Method Codes**, **Bin Usage Rule Codes**, and **Pick Bin Usage Rules** actions are added to the **Advanced Warehousing Setup** page.
- The **Pick FastTab** is added to the **Advanced Warehousing Setup** page.
- The **Pick Usage Rule Code** field is added to the **Zones**, **Bins**, and **Bin Content** pages.
- The **Pick Method Code** field is added to the **Shipping FastTab** of the **Customer Card** page and the **Shipping and Billing FastTab** of the **Sales Order** page.



2301.2.0.0

Release Note • 2/7/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Warehousing extension, when creating a Warehouse Pick from Warehouse Shipments in Business Central, the values of the following fields are automatically populated in the Warehouse Activity Header Table:

- Source No.
- Source Document
- Source Type
- Source Subtype
- Destination Type
- Destination No.

The values of these fields are filled to streamline tracking and identification of Warehouse Picks associated with customers and orders. For more information, see [Create Pick Split to Multiple Picks for Warehouse Documents](#).



2301.1.0.0

Release Note • 12/13/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
163228	Unable to turn on/off the Always Create Pick Line toggle, even when the Bin Mandatory toggle on the corresponding Location Card page is turned on.



1.2.107018.0

Release Note • 7/12/2023 • 1 min read

Enhancements/Modifications

The following features provided by this extension were rolled back as they are now provided by Business Central:

- On the **Item Tracking Code Card** page, the **Warehouse Tracking** toggle automatically updates when the **Specific Tracking** toggle is turned on/off for the lot, package, or serial no.
- On the **Item Bin Content** page, the **Max Qty.** and **Min Qty.** fields can be added with the *Personalize* function.



1.1.97968.0

Release Note • 12/20/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
116331	On the Location Card page, the Always Create Pick Line field is editable even though the Directed Put-away and Pick toggle is turned off.



1.0.76685.0

Release Note • 4/3/2023 • 2 min read

Features

With this release of **Aptean Advanced Warehousing** extension, you can:

- Control whether the Whse. Receipt posting will update the posting date of Whse. Receipt. Similarly, you can also control whether the Whse. Shipment posting will update the posting date of Whse. Shipment. See [Advanced Warehousing Setup](#) for more information.
- Automatically update the **Warehouse Tracking** field with the Item Tracking Code when the **Specific Tracking** field is enabled for any Lot, Package, or Serial No.
- Set the Bins error-free in case of the item and bin have different warehouse class codes. See [Bypass Warehouse Class Restriction](#) for more information.
- Use the **Auto Update Posting Date** and **Auto Update Shipment Date** fields on the **Warehouse Shipment** page to bypass the Posting Date and the Shipment Date. See [Bypass Posting Date and Shipment Date for Warehouse Shipment](#) for more information.
- Use the **Auto Update Posting Date** field on the **Warehouse Receipt** page to bypass the Posting Date. See [Bypass Posting Date in Warehouse Receipt](#) for more information.
- Create multiple pick documents in relation to a single Warehouse Shipment document with various options such as Source, Destination, Item, Zone, Bin or Line. See [Create Pick Split to Multiple Picks for Warehouse Documents](#) for more information.
- Add the **Max Qty.** and **Min Qty.** fields to the **Item Bin Content** page with the *Personalize* function.
- Use the **Vendor Item No.** field on the **Invt. Put-Away Subform** page and the **Warehouse Receipt Line** table. You can add the **Vendor Item No.** field with the *Personalize* function.



Introduction

Article • 4/3/2023 • 1 min read

The Apte Advanced Warehousing (AWH) extension helps you to simplify the warehousing activities by adding some extra fields to warehouse documents and creating multiple pick documents in relation to a single Warehouse Shipment document. This extension improves the usability of Warehouse Class Code for a directed location, such as particular bins can bypass the rule and therefore Whse. Receipt and Whse. Shipment may not be governed by restrictions. You don't need to remember to alter a field in the document as the posting date for Whse. Shipments and Whse. Receipts reflect the actual date of posting. In turn, the source documents are updated as per the standard logic of updating the field in Warehouse Shipment or Warehouse Receipt.



Setup

Article • 11/6/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up advanced warehousing](#)



Set up advanced warehousing

Article • 2/10/2026 • 4 min read

You can use this setup page to define various features such as to control whether the Whse. Receipt posting will update the Posting Date of Whse. Receipt. Similarly, you can also control whether the Whse. Shipment posting will update the Posting Date of Whse. Shipment.



1. Select the Search icon , enter **Advanced Warehousing Setup**, and then choose the related link.

The **Advanced Warehousing Setup** page opens.

2. On the **General** FastTab, you can turn on or turn off the following toggles:
3. **Warehouse Receipt**: By default, it is disabled. You can turn on this toggle to update the Posting Date of the Warehouse Receipt with the current work date. You can manually change this setting as per Warehouse Receipt using **Auto Update Posting Date** field on the Warehouse Receipt header.
4. **Warehouse Shipment**: By default, it is disabled. You can turn on this toggle to update the Posting Date of the Warehouse Shipment with the current work date. You can manually change this setting as per Warehouse Shipment using **Auto Update Posting Date** field on the Warehouse Shipment header.

Note

When you turn the **Warehouse Receipt** and **Warehouse Shipment** toggles on or off, this will change the **Auto Update Posting Date** field in all the existing warehouse receipt/shipment documents.

5. On the **Pick** FastTab,
 - In the **Pick Method** field, select how the system should determine eligible bins for picking items associated with documents, such as sales orders and transfer orders. By selecting a pick method, you can configure the system to use standard picking logic or apply bin-level usage rules to control item picking from zones and bins under specific conditions. *Pick Bin Usage Rules*: Select this option if you want the system to pick items only from bins that meet predefined bin usage rules. When this option is selected:
 - The system evaluates pick usage rule codes assigned to zones and bins.
 - The applicable pick method code (from the customer or sales order) is used together with bin usage rules to determine which bins are eligible.
 - Picking behavior can differ based on the document type (sales orders or transfer orders).

For example, a warehouse has:

- Fast-pick bins near dispatch
- Bulk storage bins deeper in the warehouse

By setting:



- *Pick Bin Usage Rules* pick method.
- Pick usage rule codes on bins (for example, *FAST*, *BULK*).
- Pick method codes for specific customers.

The system ensures that picks for sales orders are created only from eligible bins, based on the defined rules, instead of selecting any available bin.

Note

The **Pick Method** field is set to blank by default. The system automatically updates the **Pick Method Code** field value on the **Customer Template** page, which is inherited from the **Pick Method Code** field on the **Customer Card** page. You can also manually select the field value.

- Turn on the **Apply Rounding for Non-Base UoM** toggle, if the system must perform the following rounding:
 - If the quantity on the source document is a whole number, the system rounds the number when the **Apply Rounding for Non-Base UoM** toggle on the **Location Card** page is turned on.
 - If the quantity on the source document is a decimal number, the system does not round the number, even when the **Apply Rounding for Non-Base UoM** toggle on the **Whse.-Shipment - Create Pick** page is turned on.
 - If the location is direct put away, the system does not apply the rounding.
 - If the unit of measure is the same as the base unit of measure of the item, the system does not apply the rounding.

Note

This feature is applicable only when the Aptean [Mobile Warehouse Registration](#) extension is installed.

You can access the following pages via the action bar only when the **Pick Method** field value is set to *Pick Bin Usage Rules*.

- Pick Method Codes
- Bin Usage Rule Codes
- Pick Bin Usage Rules



Manage permission sets

Article • 11/6/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *ADVANCEDWHSE75FDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets and typically involves additional conditions or approvals before an action can be completed.

The indirect permission set ID for this extension is *ADVWHSEBASICFDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see

[Assign permissions to users and groups](#).

Assign a permission set



1. Select the Search icon , enter **Users**, and then choose the related link.
The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
The **User Card** page opens.



3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.

The associated fields are automatically updated based on the entered value. The user has the necessary permissions to use the features of the Aptean Advanced Warehousing extension, ensuring secure and role-based access.



Bypass Posting Date and Shipment Date in Warehouse Shipment

Article • 12/20/2023 • 3 min read

The **Auto Update Posting Date** and **Auto Update Shipment Date** fields are added on the **Warehouse Shipment** page to update the Posting Date and/or Shipment Date with the Work Date on posting the Warehouse Shipment. The Posting Date and/or Shipment Date will be updated on the following documents:

- Source sales document
- Item Ledger Entries
- Posted Sales Shipment
- Posted Warehouse Entries

Both these fields are not visible on the **Warehouse Shipment** page when the **Update Posting Date with Work Date** toggle for **Warehouse Shipment** is turned off on the **Advanced Warehouse Setup** page.

If you turn on the **Update Posting Date with Work Date** toggle for **Warehouse Shipment** on **Advanced Warehouse Setup** page, system will give a confirmation message that it will enable the **Auto Update Posting Date** and **Auto Update Shipment Date**. By default, these two toggles are turned on when a new warehouse shipment document is created.

1. On the **Advanced Warehousing Setup** page, turn on the **Update Posting Date with Work Date** toggle for **Warehouse Shipment**.



2. Select the Search icon , enter **Warehouse Shipments**, and then choose the related link.

The **Warehouse Shipments** page opens

3. Select the required **No.** The **Warehouse Shipment** page opens.

4. On the action bar, select **Home** > **Post Shipment** > **Post Shipment**. A dialog appears to select the required option.

5. Select **Ship** and click **OK**.

A dialog confirms that the Warehouse Shipment is posted and moved to the **Posted Warehouse Shipments** page.

Also, the Posting Date and the Shipment Date will be updated as the Work Date in all the associated documents.



Bypass Posting Date in Warehouse Receipt

Article • 4/3/2023 • 3 min read

The **Auto Update Posting Date** field is added on the **Warehouse Receipt** page to update the **Posting Date** with the **Work Date** on posting the Warehouse Receipt. The Posting Date will be updated on the following documents:

- Source purchase document
- Item Ledger Entries
- Posted Purchase Receipt
- Warehouse Entries

The **Auto Update Posting Date** field is not visible on the **Warehouse Receipt** page when the **Update Posting Date with Work Date** toggle for **Warehouse Receipt** is turned off on the **Advanced Warehouse Setup** page.

If you turn on the **Update Posting Date with Work Date** toggle for **Warehouse Receipt** on **Advanced Warehouse Setup** page, system will give a confirmation message that it will enable the **Auto Update Posting Date**.

By default, the **Auto Update Posting Date** toggle is turned on when a new warehouse receipt document is created.

1. On the **Advanced Warehousing Setup** page, turn on the **Update Posting Date with Work Date** toggle for **Warehouse Receipt**.



2. Select the Search icon , enter **Warehouse Receipts**, and then choose the related link.

The **Warehouse Receipts** page opens

3. Select the required **No**.

The **Warehouse Receipt** page opens.

4. On the action bar, select **Home > Post Receipt > Post Receipt**.

A dialog appears to select the required option.

5. Select **Ship** and click **OK**.

A dialog confirms that the Warehouse Receipt is posted and moved to the **Posted Warehouse Receipts** page.

Also, the Posting Date will be updated as the Work Date in all the associated documents.



Bypass Warehouse Class Restriction

Article • 12/20/2023 • 2 min read

You can now set the Bins as error-free in case the item and bin have different warehouse class codes.



1. Select the Search icon , enter **Locations**, and then choose the related link.
The **Locations** page opens.
2. Select the required **Code**.
The **Location Card** page opens.
3. On the **Warehouse** FastTab, turn on the **Directed Put-away and Pick** toggle.
4. On the action bar, select **Bins**.
The **Bins** page opens.
5. Turn on the **Bypass Warehouse Class Restriction** field for the specific bin assembly.
It confirms that the specified bin is not included for any warehouse class validations.

Note

If you turn on the **Bypass Warehouse Class Restriction** toggle without entering the **Bin Code**, then the system will give an error.



Create Warehouse Receipt

Article • 12/20/2023 • 3 min read

While creating the Whse. Receipt, the Warehouse Receipt lines are not populated with the Bin Code and gives an error to update the Bin Code manually due to Warehouse Class Code restrictions. With the Aptean Advanced Warehousing extension, it is possible to bypass this Warehouse Class Code restrictions. Currently, you can create the Warehouse Receipt Lines if the Bin Code on the Whse. Receipt Header is set with the *Bypass* flag.

For a directed location, if you turn on the **Bypass Warehouse Class restriction** field for the designated receiving Bin, the Create Whse. Receipt function allows the bins to be populated in the Warehouse Receipt lines.

1. On the **Location Card** page, turn on the **Directed Put-away and Pick** toggle on the **Warehouse** FastTab.
2. On the action bar, select **Bins**.
The **Bins** page opens.
3. Turn on the **Bypass Warehouse Class Restriction** field for the specific bin assembly.



4. Select the Search icon , enter **Purchase Orders**, and then choose the related link.
The **Purchase Orders** page opens.
5. On the action bar, select **New**.
The **Purchase Order** page opens.
6. Enter the vendor detail in the **Vendor No.** field on the **General** FastTab.
7. On the **Lines** FastTab, enter the **Item** and the **Quantity**.

Note

The Warehouse Class Code restriction is based on the Warehouse Class Code filled on the Item card.

8. Select the **Location Code**.
9. On the action bar, select **Release** > **Release** to release the **Purchase Order**.
The **Status** is changed to *Released*.
10. On the action bar, select **Actions** > **Warehouse** > **Create Whse. Receipt**.
A dialog confirms that Warehouse Receipt Header has been created.
11. Click **OK**.
The **Warehouse Receipt** page opens, and the designated receiving Bin Code is populated in the Warehouse Receipt lines.

Note

It works similarly for all the inbound, outbound and internal warehouse operations.



Create multiple picks for warehouse shipment

Article • 7/2/2025 • 4 min read

You can now create multiple pick documents in relation to a single Warehouse Shipment document with various options such as Source, Destination, Item, Zone, Bin or Line.



1. Select the Search icon , enter **Warehouse Shipments**, and then choose the related link.

The **Warehouse Shipments** page opens

2. Select the required **No.**

The **Warehouse Shipment** page opens.

3. On the action bar, select **Home** > **Create Pick**.

The **Whse. Shipment Create Pick** page opens.

4. Turn on the **Per Source** toggle.

It creates separate pick documents for the Warehouse Shipment lines with the same source document and source No.

Similarly, you can create pick documents by enabling the following toggles:

- **Per Destination:** Create separate pick documents for each customer (sale orders), vendor (purchase return orders), and location (transfer orders).
- **Per Item:** Create separate pick documents for each item in the Warehouse Shipment.
- **From Zone:** Create separate pick documents for each zone that you will take the items from.
- **From Bin:** Create separate pick documents for each bin that you will take the items from.
- **Per Line:** Create separate pick documents for source documents per line wise.

Note

You can use the filter to create a Pick from Whse. Shipment to include the Whse. Shipment Lines that are visible.

You can view the values of the **Source Document**, **Source No.**, **Destination Type**, and **Destination No.** fields on the **Warehouse Pick Page**.

The system does not populate the values for these fields when generating a Pick for multiple Warehouse Shipments with various source numbers.

When the **Apply Rounding for Non-Base UoM** toggle on the **Whse.-Shipment - Create Pick** page is turned on, and a whole number is entered in the **Quantity** field of the warehouse source document with a non-base unit of measure, after executing the **Whse.-Shipment - Create Pick** action, the **Quantity** field value on the **Warehouse Pick** page is rounded to the whole number.



 Note

Rounding is not applied to existing records if the source document quantity already contains a decimal value or if the location uses directed put-away and pick.

When multiple lines are selected, you can execute the **Create Multiple Whse. Pick** action.

- If the quantity on the source document is a whole number, the system rounds the number when the **Apply Rounding for Non-Base UoM** toggle on the **Location Card** page is turned on.
- If the quantity on the source document is a decimal number, the system does not round the number, even when the **Apply Rounding for Non-Base UoM** toggle on the **Whse.-Shipment - Create Pick** page is turned on.
- If the location is direct put away, the system does not apply the rounding.
- If the unit of measure is the same as the base unit of measure of the item, the system does not apply the rounding.

 Note

This feature is applicable only when the Aptean [Shop Floor Logistics](#) extension is installed.

If any line within a Warehouse shipment associated with a single sales order or purchase return order has varying values in the **Source No.**, **Source Document**, **Source Type**, **Source Subtype**, **Destination Type**, and **Destination No.** fields, the system will not populate those values on the **Warehouse Pick** page. You can view these fields through page inspection.

The values of the above mentioned fields are filled in when creating the Pick from the following documents:

- Warehouse Shipment
- Pick Worksheets



Manage warehouse with pick method

Article • 7/30/2025 • 9 min read

Define pick usage rule codes

You can define specific pick usage rules for zones or bins within each location. This functionality allows you to specify how items are picked from storage locations within a warehouse.

To set up the pick usage rule code for zones, follow the below steps:



1. Select the Search icon , enter **Locations**, and then choose the related link.
The **Locations** list page opens.
2. Select the desired location.
The **Location Card** page opens.
3. On the action bar, select **Zones**.
The **Zones** page opens.
4. In the **Pick Usage Rule Code** field, select the desired value from the list. A confirmation message appears when you change the existing value in the field. *Do you want to update the Pick Usage Rule Code for all bins within this zone?*
If you select Yes, the **Pick Usage Rule Code** field automatically updates all the associated bins within the zones. Otherwise, the values are updated only to the associated zone record.

To set up the pick usage rule code for bins, follow the below steps:



5. Select the Search icon , enter **Locations**, and then choose the related link.
The **Locations** list page opens.
6. Select the desired location.
The **Location Card** page opens.
7. On the action bar, select **Bins**.
The **Bins** page opens.
8. In the **Pick Usage Rule Code** field, select the desired value from the list.

The **Pick Usage Rule Code** field is automatically updated when the associated zone has a value set. If you modify the field value, the associated bin content record will also get updated with the same value. However, the field remains non-editable on the **Bin Content** page.



Note

You can view the **Pick Usage Rule Code** field only if the **Pick Method** field is set to *Pick Bin Usage Rules* on the **Advanced Warehousing Setup** page.

Set up pick method codes

You can define the pick method codes to control the picking process for each line as needed.

1. Open the **Pick Method Codes** page.

Note

You cannot access the **Pick Method Codes** page if the **Pick Method** field on the **Advanced Warehousing Setup** page does not have a value.

2. In the **Code** field, enter the required code to determine how to pick sales orders for a particular customer when following the pick bin usage rules.
3. In the **Description** field, enter the description of the pick method code.

You can also open the **Pick Method Codes** page via **Advanced Warehousing Setup > Actions > Pick Method Codes**.

Pick method code for customers and sales orders

You can determine the pick method code for the customer or sales order and the rule for using the pick bin.

Note

You can access the **Pick Method Code** field on the **Shipping** FastTab of the **Customer Card** page. The system automatically updates the **Pick Method Code** field value on the **Customer Template** page, which is inherited from the **Pick Method Code** field on the **Customer Card** page. You can also manually select the field value.

1. Open the **Sales Order** page.
2. On the **Shipping and Billing** FastTab, the **Pick Method Code** field is automatically filled based on the information stored on the **Customer Card** page. This field value is inherited from the code assigned to the customer linked to the sales order. You can also modify this field at the line level, and any changes made at the header level will apply to the line level as well. In case of a warehouse activity, the same pick method code will be populated to



the associated warehouse shipment document. Additionally, you cannot edit the **Pick Method Code** field when the sales order is in the *Release* state.

Note

You can view the **Pick Method Code** field if the **Pick Method** field is set to *Pick Bin Usage Rules* on the **Advanced Warehousing Setup** page.

Set up bin usage rule codes

You can define codes that represent different categories of rules for bins in a location. These codes can then be used to govern how the system generates picks.

1. Open the **Bin Usage Rule Codes** page.
2. In the **Code** field, enter the required code to classify the bin depending on its usage or scenario. This field must have a value and cannot be empty.
3. In the **Description** field, enter the description of the code, providing context for the bin usage rule codes. It is also optional to leave this field empty.

Set up pick bin usage rules

You can set up rules for using pick bins, which allows you to have more control over which bins are selected for picking based on specific criteria. By using the pick method and pick usage rule code together, you can determine the selection of bins for picking.

1. Open the **Pick Bin Usage Rules** page.
2. In the **Location Code** field, select the required code to which the rule applies.
3. In the **Pick Method Code** field, select the pick method code to which the rule applies.

Note

The **Location Code** and **Bin Usage Rule Code** fields must have a value. It cannot be empty.

4. In the **Bin Usage Rule Code** field, select the code to determine whether the bin is eligible under the bin usage rules.
5. In the **Sales Order Usage** field, select the required option from the dropdown menu. The options indicate whether bins with this pick usage rule should be considered when creating a pick for a warehouse shipment line linked to a sales order.



6. In the **Transfer Order Usage** field, select the required option from the dropdown menu. The options indicate whether bins with this pick usage rule should be considered when creating a pick for a warehouse shipment line linked to a transfer order.

Note

Empty document lines with the **Pick Method Code** field value can be used for sales and transfer order. However, for transfer order usage, only lines with an empty pick method code can be used.

Pick rules on warehouse picks and pick worksheets

When creating warehouse picks from the warehouse shipment lines or pick worksheet lines, you can define the bins for picking based on the combination of the pick method and pick usage rule code.

Inclusion of bins:

During the creation of the pick, the system searches for records on the **Pick Bin Usage Rule** page with the same location code and pick method code from the warehouse shipment line, including a blank pick method code, considering the bin content and available quantity.

- If not found, an error message is displayed.
- If the source document is a sales order, records with the **Sales Order Usage** field set as *Include*, including empty values, are filtered.
- If the source document is an outbound transfer, records with the **Transfer Order Usage** field set as *Include*, including empty values, are filtered.

Exclusion of bins:

During the creation of the pick, the system searches for records on the **Pick Bin Usage Rule** page with the same location code and pick method code, including a blank pick method code, considering the bin content and available quantity.

- If not found, an error message is displayed.
- If the source document is a sales order, records with the **Sales Order Usage** field set as *Exclude*, including empty values, are filtered.
- If the source document is an outbound transfer, records with the **Transfer Order Usage** field set as *Exclude*, including empty values, are filtered.

If no bins are available for picking, the system will not allow the creation of a pick. This ensures the accuracy and efficiency of the picking process.



 Important

The above functionality works similarly while creating the pick by using the **Create Pick** action on the **Pick Worksheet** page.



Integrations

Article • 7/2/2025 • 1 min read

The Aptean Advanced Warehousing extension has been integrated with the following extensions.

- [Aptean-Shop-Floor-Logistics.md](#)
- [Aptean Mobile Warehouse Registration](#)



Aptean Shop Floor Logistics

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When the Aptean Advanced Warehousing extension is used in conjunction with the Aptean [Shop Floor Logistics](#) extension, the system rounds pick quantity value to whole numbers when using non-base units of measure. For more information, see [Create multiple picks for warehouse shipment](#).



Aptean Mobile Warehouse Registration

Article • 7/2/2025 • 1 min read

When the Aptean Advanced Warehousing extension is used in conjunction with the Aptean [Mobile Warehouse Registration](#) extension, the system rounds pick quantity value to whole numbers when using non-base units of measure. For more information, see [Set up advanced warehousing](#).

