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NetSuite WMS Version Notes

The information and procedures in this guide are specific to NetSuite WMS Version 19.1. For Version 18.2 information and procedures, see the NetSuite WMS Setup Guide — Version 18.2.

This section summarizes the changes to NetSuite WMS between the noted version and the previous release. For information on setting up and configuring this functionality, see the appropriate section of this guide. For detailed instructions on using this functionality, see the appropriate section of the NetSuite WMS User Guide.

These version notes are subject to change.

The enhancements and changes referenced in this section are not available to NetSuite WMS customers until you have upgraded to the noted version. If you are unsure which NetSuite WMS version you are using, go to Customization > SuiteBundler > Search & Install Bundles > List. If necessary, sort the list by the Name column or search to find the NetSuite WMS row. The version number appears in the Version column.
NetSuite WMS Setup Overview

NetSuite Warehouse Management System (WMS) extends your NetSuite account and its inventory and warehouse management features. With the help of a mobile device and customized processes, NetSuite WMS enables you to streamline warehouse operations and track information in detail to better manage your inventory and warehouse transactions.

Setup of NetSuite WMS requires an active NetSuite account already set up for general use. This guide is intended for administrators installing and configuring NetSuite WMS SuiteApp with an existing NetSuite account, working in conjunction with NetSuite Professional Services.

**Note:** Oracle recommends you work closely with NetSuite Professional Services to identify the best plan for defining warehouse management records, preferences, and strategies according to your business needs.

This guide describes the required and optional setup procedures used to successfully configure NetSuite WMS with your NetSuite account. A NetSuite Administrator role and NetSuite WMS Warehouse Administrator and Warehouse Operator roles are required to complete the following procedures:

- Installing the NetSuite WMS SuiteApp
- NetSuite WMS Setup Overview
- Creating Warehouse Management Records
- Warehouse Management Settings
- Defining Warehouse Management Strategies
- Configuring System Rules and Integrations

The information and procedures in this guide are limited to achieving NetSuite WMS functionality. See the NetSuite WMS User Guide for detailed instructions for using NetSuite WMS.
Installing the NetSuite WMS SuiteApp

To provision NetSuite WMS on your NetSuite account, the following two bundles are installed:

- NetSuite WMS
- NetSuite WMS Customization

These bundles can be installed in sandbox and production accounts. You must log in to your NetSuite account using an Administrator role to install the bundles.

NetSuite WMS Bundle

When a new NetSuite WMS release version is available, the NetSuite WMS bundle is upgraded to the newer version. Currently, the NetSuite team at Oracle performs these upgrades on a scheduled, on-demand basis with your permission. You can also use this information to install the bundle. In future, these upgrades will be performed on a fixed release schedule.

When you search for bundles to install, the NetSuite WMS bundle appears in search results with the name NetSuite WMS and the bundle ID 124055. The bundle typically installs in 20-30 minutes. You can continue to work in your NetSuite account when the bundle is installing.

NetSuite WMS Customization Bundle

The NetSuite WMS customization bundle should contain all customizations. It is not upgraded when a new NetSuite WMS release version is available. Customization scripts included in this bundle should continue to work when the NetSuite WMS bundle is upgraded, unless new functionality in this bundle directly affects customization script functionality.

After a NetSuite WMS bundle upgrade, you are responsible for making any required changes to the customization scripts developed during the initial NetSuite WMS implementation. If necessary, you can contact NetSuite Professional Services to assist with these changes.

When you search for bundles to install, the NetSuite WMS Customization bundle appears in search results with the name NetSuite WMS Customization and the bundle ID 80406. The bundle typically installs in 3-5 minutes. You can continue to work in your NetSuite account when the bundle is installing.

To install a bundle:

1. Verify you are logged in to your NetSuite account using the Administrator role.
2. Go to Customization > SuiteBundler > Search & Install Bundles.
3. Click New.
4. In the Keywords field, enter NetSuite WMS.
5. Click Search.
6. Click NetSuite WMS or NetSuite WMS Customization, depending on the bundle you are installing.
7. Click Install.

**Note:** The Install button appears only for bundles that are available to be installed in your account. If the Install button does not appear, contact your NetSuite WMS project manager for more information about bundle access.

8. If necessary, click OK to acknowledge the displayed message about future bundle updates.
9. On the Preview Bundle Install page, optionally make any changes to the listed details.

10. Click Install Bundle.

The Status column on the Installed Bundles page displays the install progress. When the installation is complete, a green check mark appears in the Status column.

To view the status of bundle installations, go to Customization > SuiteBundler > Search & Install Bundles > List.
Enabling Inventory Management Features

This section describes the NetSuite inventory management features that might need to be enabled before you can use NetSuite WMS. Depending on your business requirements, you might not need to enable every feature.

Below are descriptions of inventory-related features:

Multiple Units of Measure

The Multiple Units of Measure feature enables you to define various units used to stock, purchase, and sell inventory items, and track non-monetary accounts.

For more information, see the help topic Multiple Units of Measure in the NetSuite Help Center.

Advanced Shipping

With Advanced Shipping, you can track partial shipments and invoice customers for partial or entire orders. Your picking tickets reflect the items on the order that are actually shipped.

For more information, see the help topic Advanced Shipping in the NetSuite Help Center.

Pick, Pack, and Ship

The Pick, Pack, and Ship feature offers greater flexibility processing orders by using separate transactions to pick items from inventory, pack them to be shipped, and then ship the items to the customer.

For more information, see the help topic Pick, Pack, and Ship Overview in the NetSuite Help Center.

Inventory

When you use the Inventory feature in NetSuite, you can track and manage the items your company buys, sells, and manufactures in the course of doing business.

For more information, see the help topic Inventory Management in the NetSuite Help Center.

Bin Management

You use bins to track items in stock and better manage your warehouse processing. Bins identify the places you store inventory items within your warehouse and track on-hand quantities. This helps warehouse employees know exactly where to go to find items they need when picking and fulfilling orders. You also use bins to specify where items need to be put away in stock when you receive them.

A bin number can be associated with one or more items, as an item can be associated with one or more bins. Bin numbers are included on receiving and fulfilling transactions to keep track of the on-hand quantity for each bin.

For more information on enabling and using bins, see the help topic Basic Bin Management in the NetSuite Help Center.

Multi-Location Inventory

The Multi-Location Inventory feature enables you to associate each item and transaction with allocation. Then, you can track the purchase, sale, stock level, and value of items in your warehouses, as well as transferring inventory between warehouses.
Enabling Inventory Management Features

For more information, see the help topic Multi-Location Inventory in the NetSuite Help Center.

Assembly Items

An assembly item is an inventory item made of several components but identified as a single item. Assemblies are manufactured by combining raw materials you stock.

For more information, see the help topic Assembly Items in the NetSuite Help Center.

Work Orders

Assembly work orders track the production of assembly items needed for stock or to fill orders.

For more information, see the help topic Assembly Work Orders in the NetSuite Help Center.

Serialized Inventory

Serialized inventory is a means to track the purchase and sale of physical inventory items by assigning a serial number to each unit of an item.

Serializing inventory enables you to choose specific serial numbered items to fulfill or receive an order. You can access the history of any serialized item to track the cost of the item, or check its status.

For more information, see the help topic Serial Numbered Items in the NetSuite Help Center.

Lot Tracking

Lot items track the purchase, stock, and sale of a group or quantity of items by assigning a specific number to the group or quantity. For example, a food distributor can track goods by assigning a lot number and expiration date to a group of perishable products.

For more information, see the help topic Lot Numbered Items in the NetSuite Help Center.

Inventory Status

The Inventory Status feature enables you to assign statuses to inventory to drive internal processes. You can also choose to make items unavailable to be allocated to orders based on their associated inventory status.

For more information, see the help topic Inventory Status in the NetSuite Help Center.

⚠️ Important: Before you enable the Inventory Status feature, you must close any open pick task records. For more information on closing open task records, see Open and Closed Task Records in the NetSuite WMS User Guide.

Advanced Bin / Numbered Inventory Management

The Advanced Bin / Numbered Inventory Management feature is an enhanced version of tracking inventory in bins, including for serial numbered and lot numbered items.

For more information, see the help topic Advanced Bin / Numbered Inventory Management in the NetSuite Help Center.
Inventory Count

The Inventory Count feature supports improved tracking of inventory and tighter control over assets. It enables you to enter regular periodic counts of on-hand item quantities to maintain inventory accuracy. Keeping an accurate count can help reduce required safety stock, which lowers your overhead costs.

For more information, see the help topic Inventory Count in the NetSuite Help Center.

Intercompany Cross-Subsidiary Fulfillment

Intercompany Cross-Subsidiary Fulfillment feature in your NetSuite OneWorld account enables you to fulfill orders and receive returns across multiple subsidiaries. This means that orders are not limited to be fulfilled from locations within the originating sales subsidiary. Rather, you can fulfill a single sales order from locations in multiple subsidiaries.

For more information, see the help topic Intercompany Cross-Subsidiary Fulfillment.

To enable inventory management features:

1. Log in to your NetSuite account using the Administrator role.
2. Go to Setup > Company > Setup Tasks > Enable Features.
3. On the Company tab, under the ERP General heading, check the box next to Multiple Units of Measure.
4. Click the Transactions tab.
5. Under the Shipping & Receiving heading, check the box next to the following features:
   - Advanced Shipping
   - Pick, Pack and Ship
5. Click the Items & Inventory tab.
6. Under the Inventory heading, check the box next to the following required features:
   - Inventory
   - Bin Management
7. Under the Inventory heading, check the box next to the following optional features:
   - Multi-Location Inventory
   - Assembly Items
   - Work Orders
   - Serialized Inventory
   - Lot Tracking
   - Inventory Status
   - Advanced Bin/Numbered Inventory Management
   - Inventory Count
   - Intercompany Cross-Subsidiary Fulfillment

Note: Depending on your business requirements, you might not need to enable every feature. For more information on each feature's functionality, see Enabling Inventory Management Features.

9. Click Save.
Creating Warehouse Management Records

After you enable the required inventory management features in your NetSuite account, you then configure your warehouse by creating the following records:

- Warehouse Locations
- Warehouse Zones
- Bin Locations

After you configure your warehouse, you have to enter information about the items you process within the warehouse. You can create the following warehouse records:

- Item Records
- Item Aliases
- Item Families
- Item Groups
- Carrier Service Levels

Warehouse Locations

You can create a warehouse location record for each of your company's warehouses. Then you can track inventory and transactions by location.

You can also create sublocations for each of your warehouse locations.

Following are some examples of uses for warehouse sublocations:

- holding items for quality assurance
- tracking items returned by customers or vendors separately from your main inventory
- separating damaged items from your main inventory

For example, to prevent damaged items from being allocated from your warehouse's inventory, you can create a Damaged Inventory location as a sublocation of your warehouse. Then, you can transfer damaged inventory from the warehouse location to the sublocation.

For more information, see the help topic Creating Locations in the NetSuite Help Center.

To create a warehouse location:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Site > Warehouse Site > New.
3. In the Name field, enter the name of your warehouse.
4. If you are creating a sublocation, in the Sublocation Of field, select the warehouse location the sublocation belongs to.
5. Check the WMS Make WH Site box.
6. Set any of the remaining fields.

Note: You can make an existing location a warehouse at any time by checking this box on its location record.
7. Click Save.

Warehouse Zones

Zones are areas in your warehouse that contain items with like qualities or requirements. Some examples of warehouse zones might include an electronics zone, a special handling zone, or a refrigerated items zone.

In addition to helping you organize your warehouse, zones are used in the definition of picking and putaway strategies.

To create a warehouse zone:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Zone > Zone > New.
3. In the Name field, enter a name for your warehouse zone.
4. Click Save.

Bin Locations

Bin records define physical bin locations within your warehouse. Bin record numbers are associated with items and included on receiving and fulfilling transactions to keep track of the on-hand quantity for each bin. There are three types of bin locations:

- **Storage** – store items permanently after they are put away, but before they are picked, transferred, or moved
- **Stage** – store items temporarily after they are received, but before they are put away or after they are picked, but before they are shipped
- **Work-in-Progress (WIP)** – store assembly item components for work orders temporarily after they are picked, but before they are assembled

To create a bin location:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Site > Warehouse Site > Create Bins > New.
3. In the Bin Number field, enter a number or code to designate a bin location in your warehouse. For example, you might create a bin numbering nomenclature that uses aisle, pallet position, and level in the format aisle-pallet position-level. The bin in the first aisle in the first pallet position of the first level would be A1-01-01.
4. Select the location for this bin to designate the warehouse where the bin is located.
5. In the Memo field, you can include further notes on the bin's location within the warehouse or notes on what should be stored in the bin.
6. In the WMS Zone field, select the warehouse zone where the bin is located.

Note: The location cannot be changed after you save the bin record.
7. If you are creating a stage or work-in-progress (WIP) bin location, set the **WMS Bin Location Type** field to **Stage** or **WIP**.

If you leave this field blank, the bin is recognized as a storage location by default.

8. Set the **WMS Stage Direction** field, as appropriate.

A valid value for the **WMS Stage Direction** field depends on the value you set in the **WMS Bin Location Type** field. Confirm that the values set in both fields match one of the following valid combinations:

<table>
<thead>
<tr>
<th>WMS Bin Location Type</th>
<th>WMS Stage Direction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Storage</td>
<td>In or Out</td>
</tr>
<tr>
<td>Stage</td>
<td>In only</td>
</tr>
<tr>
<td>WIP</td>
<td>Out only</td>
</tr>
</tbody>
</table>

9. In the **WMS Pick Seq No** and **WMS Put Seq No** fields, set a specific picking sequence number or putaway sequence number for the bin.

Bin sequence numbers are used to determine which bins in a warehouse zone take priority when you pick or put away items.

When NetSuite WMS suggests bins within a warehouse zone for picking or putting away items, the bins appear in ascending order by bin sequence number.

10. In the **WMS Replen Max Qty** field, enter the maximum quantity of an item the bin should contain after it is replenished.

11. In the **WMS Replen Min Qty** field, enter the minimum quantity of an item the bin should contain before it should be replenished.

12. In the **WMS Replen Qty** field, enter the usual quantity of an item to be used for replenishment tasks.

13. In the **WMS Replen Round Qty** field, enter the multiple to which the required replenishment quantity should be rounded down to determine the required number of replenishment tasks.

For more information on setting up bins for inventory replenishment, see Replenishing Inventory in the NetSuite WMS User Guide.

14. If you use them, set the **WMS Pallet Position**, **WMS Aisle**, and **WMS Level** fields for the bin.

15. Click **Save**.

After you have created bin records, you can set up item records for use with bin locations.

**Note:** You can create multiple bin records at one time by adding all of the bin information to a CSV (comma-separated value) file and using the Import Assistant to upload the data to NetSuite. Using the Administrator role, the Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. For more information, see the help topic Importing CSV Files with the Import Assistant in the NetSuite Help Center.

### Item Records

Items are the goods you receive, store, and ship within your warehouse and the parts and raw materials you purchase from vendors.

For more information, see the help topic Creating Item Records in the NetSuite Help Center.
To create an item record:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Items > Items > New.
3. Select the type of item you want to create.

**Note:** NetSuite WMS supports the following item types: Assembly/Bill of Materials, Lot Numbered Assembly/Bill of Materials, Serialized Assembly/Bill of Materials, Inventory Item, Lot Numbered Inventory Item, Serialized Inventory Item, Kit/Package.

For more information on setting specific fields when creating each type of item, see the help topic Item Types in the NetSuite Help Center.

4. In the **Item Name/Number** field, enter an identifier for the item.
5. On the **Inventory** subtab, check the **Use Bins** box.

**Important:** You must check the **Use Bins** box on each item record to use NetSuite WMS to process transactions for that item. When you attempt to receive an item that does not have the **Use Bins** box checked on its item record, you receive an error message on your RF mobile device to remind you to configure this setting before you can continue with the inbound process.

6. If you are creating an assembly item, click the **Components** subtab and add the component items of the assembly.
7. Click the **WMS** subtab.
8. Make selections in the **WMS Item Family** and **WMS Item Group** fields, as appropriate.

For more information, see Item Families and Item Groups.
9. If you want to allow this item to be mixed in bin locations with items belonging to different lots, check the **WMS Mix Lots in Bins** box.

**Note:** For two lot-controlled items to be mixed in the same bin, the **WMS Mix Lots in Bins** box must be checked on both item records.

10. If you want to allow this item to be mixed in bin locations with different items, check the **WMS Mix Items in Bins** box.

**Note:** For two items to be mixed in the same bin, the **WMS Mix Items in Bins** box must be checked on both item records.

11. If applicable, in the **Shelf Life in Days** field, enter the value that corresponds to the number of days the item can remain in the warehouse.

If you enter a value in this field, when you receive a lot-numbered item using an RF mobile device, the item's expiry date is automatically populated as the receipt date plus the defined shelf life.

12. If you want to manually replenish the item using a replenishment report, add values to the following fields:
   - **WMS Replen Min Qty** — enter the minimum quantity of an item that should be stocked before it should be replenished.
   - **WMS Replen Max Qty** — enter the maximum quantity of an item that should be stocked after it is replenished.

For more information, see Replenishing Inventory in the NetSuite WMS User Guide.

13. Set any of the remaining fields.
14. Click Save.

**Note:** You can create multiple item records at one time by adding all of the item information to a CSV (comma-separated value) file and using the Import Assistant to upload the data to NetSuite. Using the Administrator role, the Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. For more information, see the help topic Importing CSV Files with the Import Assistant in the NetSuite Help Center.

**Item Aliases**

Item alias records provide a name for an item that is alternate to the name used in your warehouse. For example, you can create an item alias to track an item's vendor code. If the name of the item used in the warehouse is red t-shirt, but your vendor refers to the item by the code 123456, create an item alias record and enter 123456 in this Name field and select red t-shirt in the Item field.

If an item has an associated alias, you can enter the item alias instead of the item name when prompted to enter an item on your RF mobile device.

An item can have more than one associated item alias. However, the same item alias cannot be associated with more than one item.

**To create an item alias:**

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Items > Item Alias > New.
3. In the Name field, enter the alias you want to provide for your item.
4. If desired, describe the alias, or the reason for the alias, in the Alias Description field.
5. In the Item field, select the item that you are providing an alias for.
6. Set any of the remaining fields.
7. Click Save.

**Item Families**

Item families are groupings of like products that can be used to identify items that should be stored together in the same area of your warehouse. For example, you can create a clothing item family to identify all clothing items and define a putaway strategy to put away all clothing items in bin locations in a specified zone. The item family is set on the WMS subtab of item records.

**To create an item family:**

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Items > Item Family > New.
3. In the Name field, enter the name of the item family you are creating.
4. Click Save.

**Item Groups**

Item groups are groupings of like products that use a more refined classification than item families. For example, you can create a pants item group to more specifically identify items than by using a clothing
item family. The item group is set on the WMS subtab of item records. Like item families, item groups can also be used to define picking and putaway strategies.

To create an item group:
1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Items > Item Group > New.
3. In the Name field, enter the name of the item group you are creating.
4. Click Save.

Order Types

Order type records are used to associate attributes to items to drive internal processes. You can create multiple order types and associate each outbound order with one order type. Order types are referenced in picking strategies and picking reports. For example, you can create a picking strategy to define where orders of a specified type should be picked from or set an order type on a picking report to only include orders of the same type.

To create an order type:
1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Warehouse > WMS Order Type > New.
3. In the Name field, enter a name for the order type you are creating.
4. In the Location field, select the appropriate warehouse location.
5. Click Save.

Inventory Statuses

Inventory status records are used to associate attributes to items to drive internal processes. For example, you can create a Damaged inventory status record to prevent items with that status from being sold.

For more information, see the help topic Creating Inventory Status Records in the NetSuite Help Center.

Carrier Service Levels

Carrier service level records associate additional properties with existing NetSuite shipping items and enable NetSuite WMS to customize shipping processes to your warehouse requirements.

You should create one carrier service level record for each shipping item that you use in your warehouse. When you set the Shipping Method field on sales orders and transfer orders, the values configured in the carrier service level are also associated with the order.

For more information on NetSuite shipping items, see the help topic Shipping Items in the NetSuite Help Center.

To create a carrier service level:
1. Log in to your NetSuite WMS account using the Warehouse Operator role.
2. Go to Shipping > Shipping > Carrier Service Level > New.
3. In the **Name** field, enter a name to identify the carrier service level.
4. In the **Location** field, select the appropriate warehouse location.
5. In the **NS Ship Method** field, select the NetSuite shipping item with which you want to associate additional properties.
6. If you want to allow orders associated with this shipping method to use the quick ship feature, check the **Allow Quick Ship** box.

**Note:** You must check the **Allow Quick Ship** box for orders associated with this carrier service level to be able to use the quick ship feature. The quick ship feature enables you to mark an item as shipped manually and handle the shipping process independently from NetSuite WMS and its shipping integration. You might use this feature for orders that do not need to go through a formal shipping process, such as customer pick-ups or internal sales orders.

7. Set any of the remaining fields.
8. Click **Save**.

### Moving Existing Items To Bin Locations

If you already have existing items in your NetSuite account that are not associated with bin locations, you can move those items to their storage bin locations using the WMS Bin Putaway Worksheet record type in the Import Assistant.

For more information, see the help topic [Importing CSV Files with the Import Assistant](#) in the NetSuite Help Center.

**To move existing items to bin locations:**

1. Create a CSV (comma-separated value) file with the following data:
   - Item
   - Name
   - Putaway Quantity
   - Serial/Lot Number (if required)
   - To Bin Location
   - Units
   - WH Location

   **Note:** You can import up to 500 line items in a single CSV file.

2. Log in to NetSuite WMS using the Administrator role.
3. Go to Setup > Import/Export > Import CSV Records.
4. Set the **Import Type** field to **Custom Records**.
5. Set the **Record Type** field to **WMS Bin Putaway Worksheet**.
6. Under CSV File(s), click **Select**.
7. Open the file you created in step one.
8. Click **Next** to move through the pages of the Import Assistant.
9. Click Save & Run.
Warehouse Management Settings

Use the following settings to define how NetSuite WMS processes related transactions.

Using Bins On Item Records

The Use Bins setting determines if an item is authorized to be used with bins.

**Important:** You must check the Use Bins box on each item record to use NetSuite WMS to process transactions for that item. When you attempt to receive an item that does not have the Use Bins box checked on its item record, you receive an error message on your mobile device to remind you to configure this setting before you can continue with the inbound process.

To set an item to use bins:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Items > Items.
3. Click Edit next to the name of the item.
4. On the item record, click the Purchasing/Inventory subtab.
5. Under the Inventory Management heading, check the Use Bins box.
6. Click Save.

**Note:** If you use the Import Assistant to upload a CSV (comma-separated value) file to create multiple item records at one time, you can configure a Use Bins column in the CSV file to check the Use Bins box on each item record at the time of import. Using the Administrator role, the Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. For more information, see the help topic Importing CSV Files with the Import Assistant in the NetSuite Help Center.

Using Preferred Bins on Item Receipts

When you enable the Use Preferred Bin on Item Receipts preference, the Bin field on item receipts defaults to the preferred bin instead of leaving the field blank.

To use preferred bins on item receipts:

1. Log in to your NetSuite account using the Administrator role.
2. Go to Setup > Accounting > Preferences > Accounting Preferences.
3. Click the Items/Transactions subtab.
4. Under the Inventory heading, check the Use Preferred Bin on Item Receipts box.
5. Click Save.

Fulfilling Overages

Sometimes when you are fulfilling an order, the quantity you are processing is more than the quantity shown on the order or pick report. This additional amount is called an overage, and NetSuite WMS
enables you to process overages using the Allow Overage on Item Fulfillments preference. With this preference enabled, you can enter a quantity greater than the quantity remaining for an item when processing an outbound order.

To fulfill overages:
1. Log in to your NetSuite account using the Administrator role.
2. Go to Setup > Accounting > Preferences > Accounting Preferences.
3. Click the Order Management subtab.
4. Under the Fulfillment heading, check the Allow Overage on Item Fulfillments box.
5. Click Save.

Activating the Bar Coding and Item Labels Feature

The Bar Coding and Item Labels feature automatically generates a bar code for each item based on the Item Name/Number, or Stock Keeping Unit (SKU), on the item record. Item bar codes are generated based on the contents of the Item Name/Number field in an item record. Most bar codes use a number or alphanumeric string for this field. Bar codes are also generated for each transaction, as well as serial numbers, if you use them.

The Bar Coding and Item Labels feature also enables you to print bar code labels for each item.

To activate the bar coding and item labels feature:
1. Log in to your NetSuite account using the Administrator role.
2. Go to Setup > Company > Setup Tasks > Enable Features.
3. Click the Items & Inventory subtab.
4. Under the Items heading, check the Bar Coding and Item Labels box.
5. Click Save.

Setting the Default Items to Zero Received/Fulfilled Preference

When you set the Default Items to Zero Received/Fulfilled preference, items default to unfulfilled when you open a fulfillment transaction. Then, you mark the items you want to fulfill on the fulfillment.

When using bar codes, setting this preference assists in scanning bar codes to fulfill items.

To set the Default Items to Zero Received/Fulfilled preference:
1. Log in to your NetSuite account using the Administrator role.
2. Go to Setup > Accounting > Accounting Preferences.
3. Click the Order Management subtab.
4. Under the Fulfillment heading, check the Default Items to Zero Received/Fulfilled box.
5. Click Save.
Defining Warehouse Management Strategies

Warehouse management strategies define where items should be put away after they are received and where operators should go to pick items when they are ordered. You can set any of the following criteria to define your strategies: item, item family, item group, zone, and sequence.

The sequence set in your strategies determines which strategy should take priority over other applicable strategies. Based on the criteria defined in your warehouse management strategies, NetSuite WMS suggests the appropriate bin locations for picking and putting away items.

There is no limit to the number of warehouse management strategies you can create. However, you should define at least one default picking strategy and one default putaway strategy, each with a default zone and high sequence number. As you add strategies, these default strategies suggest default bin locations when items do not match the criteria defined in any of your other warehouse management strategies.

Your specific warehouse operations and business needs determine the number and definition of your required strategies. When defining warehouse management strategies, NetSuite recommends that you work in close consultation with your NetSuite Project Manager.

Putaway Strategies

Putaway strategies define where an item should be put away after it is received and determine the storage bin locations NetSuite WMS suggests in the inbound processing of orders.

NetSuite WMS suggests storage bins for putting away an item using the following logic:

1. Get the Item Group, Item Family, WMS Mix Lot, WMS Mix Item, and Preferred Bin Location values from the item record.
2. Find all of the putaway strategies with criteria that match the item.
3. Get the Warehouse Zone and Sequence values for each of the strategies found in step 2.
4. Order the warehouse zones by their associated strategy’s sequence number, starting with the lowest.
5. For zones with the lowest strategy sequence number, find all associated bin locations, considering the following restrictions:
   - If the item is configured to allow mixed items, find all associated bin locations.
   - If the item is configured to not allow mixed items, find only the associated bin locations for the selected item.
   - If the item is configured to allow mixed lots, find all associated bin locations.
   - If the item is configured to not allow mixed lots, find only the associated bin locations for the selected lot.
6. If fewer than five available bin locations are found, repeat step 5 for each of the remaining strategies in ascending order by sequence number until five available bin locations are found or all putaway strategies have been searched.
7. Order the bin locations from step 5 by their putaway sequence number.
8. Display the item’s preferred bin location, if available, followed by the top five available bin locations in the following order:
Putaway Strategies

a. Bin locations matching the criteria in the putaway strategy with the lowest sequence number, in ascending order based on the putaway sequence set in their bin records.

b. Bin locations matching the criteria in the putaway strategy with each subsequent sequence number, in ascending order based on the putaway sequence set in their bin records.

To define a putaway strategy:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Warehouse > Put Strategies > New.
3. In the Name field, enter a name for the putaway strategy.
4. Set any of the Item, Item Family, or Item Group fields.
5. In the Zone field, select the warehouse zone where items that match the defined criteria should be put away.
6. In the Sequence field, enter a sequence number for the putaway strategy.

Note: A strategy with a lower sequence number takes priority over a strategy with a higher sequence number.

For example, assume strategy A has a sequence number of 2 and strategy B has a sequence number of 4, and both strategies apply to item X. When you put away item X, NetSuite WMS suggests a bin location in the zone defined in strategy A before a bin location in the zone defined in strategy B.

7. In the Location field, select your warehouse location.
8. If you use them and want to apply them to the strategy, in the Class and Department fields, select the appropriate values.
   For more information, see the help topic Departments and Classes Overview in the NetSuite Help Center.
9. In the Units field, select whether you want to apply the strategy to cases, pallets, or eaches.
10. In the Inventory Status field, select the status to which you want the strategy to apply.
    For more information, see the help topic Inventory Status in the NetSuite Help Center.
11. Click Save.

Picking Strategies

Picking strategies define where an item should be picked from when it is ordered and determine the bin locations NetSuite WMS suggests in the outbound processing of orders.

NetSuite WMS suggests storage bins for picking an item using the following logic:

1. Get the item type, Item Group, Item Family, and Preferred Bin Location values from the item record.
2. Find all of the picking strategies with criteria that match the item.
3. Get the Warehouse Zone and Sequence values for each of the strategies found in step 2.
4. Order the warehouse zones by their associated strategy's sequence number, starting with the lowest.
5. For the zone with the lowest strategy sequence number, find all associated bin locations.
Picking Strategies

6. Determine whether any of the bin locations found in step 5 have inventory available for picking.
7. If fewer than five available bin locations are found, repeat steps 5 and 6 for each of the remaining strategies in ascending order by sequence number until five available bin locations are found or all picking strategies have been searched.
8. For lot numbered items, get the expiry date for each available item found in the bin locations found in step 6.
9. Order the bin locations found in step 6 by their picking sequence number.
10. Display the item's preferred bin location, if available, followed by the top five available bin locations in the following order:
    a. If the item being picked is a lot numbered item, bin locations that contain items that are about to expire, in chronological order based on the expiry date set for the item's lot number.
    b. Bin locations matching the criteria in the picking strategy with the lowest sequence number, in ascending order based on the picking sequence set in their bin records.
    c. Bin locations matching the criteria in the picking strategy with each subsequent sequence number, in ascending order based on the picking sequence set in their bin records.

To define a picking strategy:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Warehouse > Pick Strategies > New.
3. In the **Name** field, enter a name for the picking strategy.
4. Set any of the **Item**, **Item Family**, or **Item Group** fields.
5. In the **Zone** field, select the warehouse zone where items that match the defined criteria should be picked from.
6. In the **Sequence** field, enter a sequence number for the picking strategy.

   **Note:** A strategy with a lower sequence number takes priority over a strategy with a higher sequence number.

   For example, assume strategy A has a sequence number of 2 and strategy B has a sequence number of 4, and both strategies apply to item X. When you pick item X, NetSuite WMS suggests a bin location in the zone defined in strategy A before a bin location in the zone defined in strategy B.

7. In the **Location** field, select your warehouse location.
8. If you want to pick items from inbound staging bin locations, check the Include I/B Stage Inventory box.
9. In the **Units** field, select whether you want to apply the strategy to cases, pallets, or eaches.
10. If you use them and want to apply them to the strategy, in the **Class** and **Department** fields, select the appropriate values.
    For more information, see the help topic Departments and Classes Overview in the NetSuite Help Center.
11. In the **Units** field, select whether you want to apply the strategy to cases, pallets, or eaches.
12. In the **Inventory Status** field, select the status or statuses to which you want the strategy to apply.
    - All Available — apply strategy to all items associated with statuses that are configured to be available for allocation
- Not Available — apply strategy to all items associated with statuses that are configured to be not available for allocation
- <status name> — apply strategy to all items associated with this status

For more information, see the help topic Inventory Status in the NetSuite Help Center.

13. Click Save.
Configuring System Rules and Integrations

You can configure the following system rules and integrations with your NetSuite WMS account to extend its functionality:

- Mobile Devices
- System Rules
- NetSuite WMS Shipping Integration
- Electronic Data Interchange (EDI) Integration

Mobile Devices

NetSuite WMS leverages the mobility and convenience of mobile devices to process inbound, outbound, and inventory transactions and post real-time updates to your NetSuite account. For use with NetSuite WMS, your mobile devices should include the following features:

- at least 256 MB flash memory
- Android 4.1 or higher
- 1D barcode scanner
- 4 inch or larger touch screen
- 802.11a/b/g enabled
- Bluetooth enabled
- HTML 5 & JavaScript enabled browser (TLS 1.2 compliant)
- Interactive Sensor Technology (IST)
- ruggedized or semi-ruggedized (optional)

Note: Before you begin, verify you received a mobile device URL from NetSuite Professional Services.

To configure your mobile device for use with NetSuite WMS:

1. On your mobile device, open an internet browser.
2. Go to the URL provided by NetSuite Professional Services.
3. Log in to NetSuite using your user name and password.
   The Warehouse Location page appears.
4. Set this page as your device browser’s home page and create a shortcut to the page on your device’s home screen.
5. Depending on your preference, configure your mobile device to perform a Tab or Enter action after you scan an item.
   Your NetSuite Project Manager can provide more information about this configuration.

Using Custom Menu Options on Mobile Devices

You can add a custom menu option to each of the following mobile device menus:

- Receiving
- Picking
- Work Orders
- Inventory
Main Menu

For each custom menu option you want to use, you first create a Use custom RF menu system rule and then create a corresponding custom flow script mapping record for the custom workflow you want to associate with the custom menu option.

The process values must match in the system rule and corresponding custom flow script mapping record.

When you select a custom menu option, a script runs to execute the custom workflow defined in the Custom flow script mapping record.

To create the custom menu option system rule:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Warehouse > System Rules.
3. Do one of the following:
   - To set up custom menu options on mobile devices for all warehouse locations, click Edit next to Use custom RF menu items?.
   - To set up custom menu options on mobile devices to accommodate a business exception that applies to one location only, complete the following steps:
     1. Click View next to Use custom RF menu items?.
     2. In the Actions menu, click Make Copy.
     3. In the Name field, enter Use custom RF menu items?.
     4. In the Location field, select the appropriate warehouse location or warehouse sublocation.
4. In the Rule Value field, enter Y.
5. Check the Active box.
6. Set the Process Type field to the menu to which you want to add a custom menu option.
7. Click Save.

To create a custom flow script mapping record for the custom workflow:

1. Log in to your NetSuite WMS account using the Administrator role.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Click New Record next to Custom flow script mapping.
4. In the Name field, enter a name for your custom menu option workflow.
5. Set the Process field to the menu to which you want to add a custom menu option.
6. Enter the appropriate script information in the Script ID and Deployment ID fields. For more information on scripts, see the help topic SuiteCloud (Customization, Scripting, and Web Services).
7. Click Save.

System Rules

System rules control specific processes and behavior in NetSuite WMS and can be edited to enable alternate behavior. By default, the Location field on system rules is left blank so they apply to all warehouse locations and warehouse sublocations configured in your account.

To enable alternate behavior for one warehouse location or warehouse sublocation only, you can make a copy of an existing system rule and make the appropriate changes. For example, if you have a
business exception that applies to one warehouse location, you make a copy of the appropriate system rule and set the Location field to the applicable warehouse location or warehouse sublocation.

For more information on any of the records or functionality referenced in the behavior descriptions, see the NetSuite WMS User Guide.

Default System Rule Values

By default, NetSuite WMS is configured with the following system rule values and behaviors:

<table>
<thead>
<tr>
<th>System Rule</th>
<th>Default Rule Value</th>
<th>Default Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manually post item receipts?</td>
<td>N</td>
<td>An item receipt is posted to NetSuite for each individual item after it is put away.</td>
</tr>
<tr>
<td>Manually pack orders?</td>
<td>N</td>
<td>Items are considered auto-packed after they are picked.</td>
</tr>
<tr>
<td>Consolidate item fulfillments by sales order?</td>
<td>Y</td>
<td>If manual packing is disabled, an item fulfillment record is posted to NetSuite after all items in the order are picked. If manual packing is enabled, an item fulfillment record is posted to NetSuite after all items in the order are manually marked as packed.</td>
</tr>
<tr>
<td>Use WMS Shipping Integration?</td>
<td>Y</td>
<td>The NetSuite WMS Shipping Integration is enabled. This integration provides a connection between NetSuite and your parcel carrier shipping software (for example, FedEx Ship Manager, UPS WorldShip, or USPS Endicia).</td>
</tr>
<tr>
<td>Generate EDI 856 outbound ASNs?</td>
<td>N</td>
<td>EDI ASN data is not generated when items are shipped. This behavior is required if you do not need to send customers advance shipping notices (ASNs) after items are shipped.</td>
</tr>
<tr>
<td>Stage received items before putting away?</td>
<td>N</td>
<td>Storage bin locations are suggested when orders are received. This behavior is required if you want to put away items directly to their storage bin locations as you receive them.</td>
</tr>
<tr>
<td>Use custom multi-order pick reports?</td>
<td>Y</td>
<td>You can customize the layout of multi-order pick reports.</td>
</tr>
<tr>
<td>Use custom single order pick reports?</td>
<td>Y</td>
<td>You can customize the layout of single order pick reports.</td>
</tr>
<tr>
<td>Allow picking of expired items?</td>
<td>Y</td>
<td>Items from expired lots are listed on mobile devices when you pick items for orders.</td>
</tr>
<tr>
<td>Use custom RF menus?</td>
<td>N</td>
<td>Custom menu options cannot be added to mobile device menus.</td>
</tr>
<tr>
<td>Use custom single order packing lists?</td>
<td>N</td>
<td>The default format is used for single order packing lists.</td>
</tr>
<tr>
<td>Stage picked items before shipping?</td>
<td>N</td>
<td>Outbound staging locations are not suggested on mobile devices after items are picked.</td>
</tr>
</tbody>
</table>

Alternate System Rule Values

Based on your business needs, you can change the default system rule values to enable the following alternate behaviors:
<table>
<thead>
<tr>
<th>System Rule</th>
<th>Alternate Rule Value</th>
<th>Alternate Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manually post item receipts?</td>
<td>Y</td>
<td>One item receipt is posted for all items in an order after they are put away and you manually select to post the item receipt.</td>
</tr>
<tr>
<td>Manually pack orders?</td>
<td>Y</td>
<td>Items are marked packed after they are picked and you manually select to mark them packed. An item fulfillment record is updated in NetSuite after you mark an item packed.</td>
</tr>
<tr>
<td>Consolidate item fulfillments by sales order?</td>
<td>N</td>
<td>If manual packing is disabled, an item fulfillment record is posted to NetSuite after each confirmed item is picked.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If manual packing is enabled, an item fulfillment record is posted to NetSuite after all confirmed items in a carton are packed.</td>
</tr>
<tr>
<td>Use WMS Shipping Integration?</td>
<td>N</td>
<td>The NetSuite WMS Shipping Integration is disabled. This integration provides a connection between NetSuite and your parcel carrier shipping software (for example, FedEx Ship Manager, UPS WorldShip, or USPS Endicia).</td>
</tr>
<tr>
<td>Generate EDI 856 outbound ASNs?</td>
<td>Y</td>
<td>EDI ASN data is generated when items are shipped. This behavior is required if you are working with a NetSuite partner to send advance shipping notices (ASN) to customers using the Electronic Data Interchange (EDI) method after items are shipped.</td>
</tr>
<tr>
<td>Stage received items before putting away?</td>
<td>Y</td>
<td>Staging bin locations are suggested when orders and customer returns are received. This behavior is required if you want to receive items to a staging area before they are put away to their storage bin locations.</td>
</tr>
<tr>
<td>Use custom multi-order pick reports?</td>
<td>N</td>
<td>The default format is used for multi-order pick reports.</td>
</tr>
<tr>
<td>Use custom single order pick reports?</td>
<td>N</td>
<td>The default format is used for single order pick reports.</td>
</tr>
<tr>
<td>Allow picking of expired items?</td>
<td>N</td>
<td>Items from expired lots are not listed on mobile devices when you pick items for orders.</td>
</tr>
<tr>
<td>Use custom RF menus?</td>
<td>Y</td>
<td>Custom menu options can be added to mobile device menus.</td>
</tr>
<tr>
<td>Use custom single order packing lists?</td>
<td>Y</td>
<td>A custom format is used for single order packing lists.</td>
</tr>
<tr>
<td>Stage picked items before shipping?</td>
<td>Y</td>
<td>Outbound staging locations are suggested on mobile devices after items are picked.</td>
</tr>
</tbody>
</table>

To change the default system rule values:

1. Loin to your NetSuite WMS account using the Warehouse role.
2. Go to Setup > Warehouse > System Rules.
3. Do one of the following:
   - To change the default system rule value for all warehouse locations, click **Edit** next to the system rule you want to change.
   - To change the default system rule value to accommodate a business exception that applies to one warehouse location only, complete the following steps:
     1. Click **View** next to the system rule you want to change.
2. In the **Actions** menu, click **Make Copy**.
3. In the **Name** field, enter the same name as the system rule you copied.
4. In the **Location** field, select the warehouse location you want the rule to apply to.
   
4. In the **Rule Value** field, enter **Y** or **N**, depending on the system rule you are editing.
   
   For more information about how each system rule value affects system behavior, see Default System Rule Values and Alternate System Rule Values.
5. To activate the system rule, check the **Active** box.
6. Click **Save**.

Repeat steps 3 to 6 for each system rule you want to change.

## Label Printing

To set up label printing, you must create the appropriate system rule and then configure the appropriate settings in the NetSuite Printer Driver and Integrator application.

For instructions, see the following procedures:

- To change the default system rule values:
- To configure the NetSuite WMS Printer Driver and Integrator application:

If you want to print labels using ZPL and the NetSuite WMS Printer Driver and Integrator application, use the following system rules:

<table>
<thead>
<tr>
<th>System Rule</th>
<th>Rule Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label Printing: Address Labels using ZPL</td>
<td>Y</td>
</tr>
<tr>
<td>Label Printing: Item labels using ZPL</td>
<td>Y</td>
</tr>
<tr>
<td>Label Printing: Pallet labels using ZPL</td>
<td>Y</td>
</tr>
</tbody>
</table>

If you want to print labels using third-party label printing software, use the following system rules:

<table>
<thead>
<tr>
<th>System Rule</th>
<th>Rule Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Label Printing: Address Labels with 3rd party integration</td>
<td>Y</td>
</tr>
<tr>
<td>Label Printing: Item Labels with 3rd party integration</td>
<td>Y</td>
</tr>
<tr>
<td>Label Printing: Pallet Labels with 3rd party integration</td>
<td>Y</td>
</tr>
</tbody>
</table>

## Standard Label Formats

NetSuite WMS prints the following standard label formats:
<table>
<thead>
<tr>
<th>Label Type</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Address</strong></td>
<td><img src="image" alt="Address Example" /></td>
</tr>
<tr>
<td><strong>Item</strong></td>
<td><img src="image" alt="Item Example" /></td>
</tr>
</tbody>
</table>
You can enter item information automatically by scanning linear and 2D composite bar codes, eliminating manual entry. This support enables you to reuse supplier bar codes and drive internal processes by printing and scanning these bar codes.

You first create a composite bar code template for each of your items. The template configures components such as the item number, UOM, lot number, expiry date, quantity, and serial number. A bar code template can be associated with multiple vendors. Then, when you process items using mobile devices, you can scan composite bar codes to input the information configured in the bar code template.
Composite bar code components have a fixed length. If you configure an item's index length as 14 characters and your item data is less than 14 characters, padding characters are added to reach the fixed length.

You can scan composite bar codes for the following processes using mobile devices:

- Bin Transfer
- Counting
- Inventory Transfer
- Picking
- Putaway
- Receiving
- Replenishment

If you have configured a composite bar code for an item, the bar code appears in the following format on a pallet label when you print it during the receiving process.

You can also configure custom bar code components and map them to specific mobile device screens. For example, if you want to capture information in a custom field, such as an item's Bill of Lading number when you receive a purchase order, you create a bar code component mapping record. On the mapping record, you configure a Bill of Lading number text field to appear in a specific location on the PO Receiving page on mobile devices.

**To create a linear or 2D composite bar code template:**

1. Log in to your NetSuite WMS account using the Warehouse role.
2. Go to Setup > Miscellaneous > Composite Bar Code Template.
3. Enter a name in the **Bar Code Template Name** field.
4. Select a value in the **Padding Character** field.
5. On the **Bar Code Component** subtab, complete the following fields:
   - Component
   - Starting Index
   - Ending Index
   - Data Format
   The size of the index range for the Expiry Date component must be equal to the number of characters in the Data Format field. For example, if the Data Format field is set to MMDDYY, the index range size must be six. An example valid index range is 11-16.
6. On the Vendors subtab, select a value in the **Vendor** field.
7. Click **Save**.

**To map bar code components to mobile device pages:**

1. Log in to your NetSuite WMS account using the Warehouse role.
2. Go to Setup > Miscellaneous > Composite Bar Code Component Mapping.
3. Select the **Component** you want to map to a mobile device page.
4. Select the mobile device **Page** to which you want to map the component.
5. In the **Input Field Type** field, select whether you want to input the component data to a text box or select data from a drop-down list.
6. In the **Input Field Type Index** field, enter a number to correspond to the position on the mobile device page where you want the field to appear.
   For example, if you want the field to appear as the third field on the page, enter 3 to denote the third position.
7. Click **Save**.

**Configuring GS1 and HIBC Composite Bar Codes**

You can configure composite bar codes in GS1 and HIBC formats to include an item's vendor, UPC, lot number, and expiry date. For each bar code format you want to use, you create a WMS Barcode Parsing record for each piece of information you want to include on the bar code.

For example, if you want to use a GS1 composite bar code that includes an item's vendor, UPC, lot number, and expiry date, you create the following:

- WMS Bar Code Parsing record 1: Barcode Format Type = GS1; Bar Code Input Type = Vendor
- WMS Bar Code Parsing record 2: Barcode Format Type = GS1; Bar Code Input Type = Item UPC Code
- WMS Bar Code Parsing record 4: Barcode Format Type = GS1; Bar Code Input Type = LotNo
- WMS Bar Code Parsing record 3: Barcode Format Type = GS1; Bar Code Input Type = Expiry Date

GS1 and HIBC composite bar codes can be used in inbound processing only. When you scan a barcode, the information stored in the barcode is populated on mobile device screens.

**To create a WMS bar code parsing record:**

1. Log in to your NetSuite WMS account using the Administrator role.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Click New Record next to WMS Barcode Parsing.
4. In the Barcode Format Type field, enter GS1 or HIBC.
5. Set the Barcode Input Type field to the appropriate piece of information for which you are creating the parsing record.
6. Enter the appropriate values in the Delimiter, Starting Index, and Ending Index fields.
7. If you are creating a parsing record for an expiry date, select the Date Format you want to use.
8. Click Save.

NetSuite WMS Shipping Integration

The NetSuite WMS Shipping Integration provides a connection between NetSuite and your parcel carrier shipping software (for example, FedEx Ship Manager, UPS WorldShip, or USPS Endicia). This connection enables you to automate some of your outbound processing tasks to streamline the shipping process.

The NetSuite WMS Shipping Integration uses the NetSuite WMS Printer Driver and Integrator application to automatically:

- pull shipping data from NetSuite WMS to push it to your carrier shipping software.
- generate shipping labels for each carton packed using NetSuite WMS.
- print shipping labels to printers in your warehouse.
- pull tracking number information from your carrier shipping software and push it to NetSuite WMS.

The NetSuite WMS Printer Driver and Integrator application is installed on the same computer in your warehouse's shipping station that is used to run your parcel carrier's shipping software. As items are packed in the warehouse, the application runs a scheduled task to find all orders that are ready to be shipped. Using the information stored in the WMS Ship Manifest record, it creates shipping labels and prints them at the printer you configure in the application.

NetSuite WMS Printer Driver and Integrator Application Installation Prerequisites

Before you start to install the NetSuite WMS Printer Driver and Integrator application, verify that the following conditions are met:

- The computer on which you are installing the application runs on Windows XP, Windows Vista, Windows 7, or Windows 8.
- The computer has at least 80 GB of available space and 4 MB of RAM.
- You have administrator rights to install software on the computer and print server.
- You have carrier shipping software (for example, FedEx Ship Manager, UPS WorldShip, or USPS Endicia) installed on the same computer on which you are installing the Shipping Integration application.

To install the NetSuite WMS Printer Driver and Integrator application:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Documents > Files > File Cabinet.
3. On the left pane, click **SuiteBundles**.
   If you do not know the bundle number, go to Customization > Suite Bundler > Search & Install Bundles > List. If necessary, sort the list by the **Name** column or search to find the **NetSuite WMS**. The bundle number appears in the **Bundle ID** column next to the bundle name.
5. Click **Integration**.
6. Click **Download** next to **NSWMS Print Driver Application**.
7. Save the zip file locally on your computer.
8. Extract the contents of the zip file to a folder locally on your computer.
9. Select the NetsuiteCarrierIntegrator application file and create a shortcut for the application on your computer’s desktop.

To log in to the NetSuite WMS Printer Driver and Integrator application for the first time:

**Note:** Before you begin, verify that the show internal ID preference is set in your NetSuite WMS account. Using the Administrator role, go to Home > Set Preferences > Defaults. Check the **Show Internal IDs** box. Click **Save**.

1. Log in to your NetSuite WMS account using the Administrator role.
2. Double-click the NetsuiteCarrierIntegrator shortcut on your computer’s desktop to open the NetSuite Print Driver application.
3. If necessary, click **Run**.
4. Go to Settings > Login.
5. Check the **Sandbox** or **Production** box, depending on what environment you are using to test or use the NetSuite WMS Printer Driver and Integrator application.
6. In the **Role** field, enter the Internal ID for the WMS Web Services Admin role.
   To find the internal ID for this role, go to Setup > Users/Roles > Manage Roles.
7. In the **Account ID** field, enter your NetSuite WMS account number.
   To find the account number, go to Setup > Integration > Web Services Preferences.
8. Enter the email address and password for a user that has access to NetSuite WMS and Web Services.
9. Click **Submit**.
10. If you are prompted to restart the integration, click **Yes**.

After you log in to the NetSuite WMS Printer Driver and Integrator application for the first time, you do not have to log in using this procedure on subsequent logins as your login credentials are saved to the application’s configuration file (your password is encoded).

To configure the NetSuite WMS Printer Driver and Integrator application:

**Note:** Before you begin, verify that the show internal ID preference is set in your NetSuite WMS account. Using the Administrator role, go to Home > Set Preferences > Defaults. Check the **Show Internal IDs** box. Click **Save**.

1. Open the NetSuite WMS Printer Driver and Integrator application.
2. Go to Settings > Configuration.
Record Types

1. Log in to your NetSuite account using the Administrator role.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Make note of the internal IDs for the following record types:
   - WMS Ship Manifest
   - WMS Label Printing
   - WMS Commodity Shipment
   - WMS Open Task
   - WMS External Labels
4. In the NetSuite WMS Printer Driver and Integrator application, in the Record Types section, enter the internal IDs from step 3 into the corresponding fields.

Flags

1. Check the Get Shipment Data box.
   This setting generates the worldship.csv file that is used to communicate data from NetSuite WMS to the parcel carrier shipping software. Data is pulled from NetSuite WMS and written to the worldship.csv file. Data is pushed from the worldship.csv file to the parcel carrier software.
2. Check the box next to each of the following features you want to enable:
   - International Shipment – show commodity information in the worldship.csv file for orders shipping internationally
   - Update UPS Tracking# – read tracking number information from the UPS Access database and write it back to NetSuite records
   - Update FedEx Tracking# – read tracking number information from the FedEx Access database and write it back to NetSuite records
   - BarTender Labels Generation – generate a text file that the BarTender application uses to format and print labels

BarTender Labels Generation

If you have checked the BarTender Labels Generation box in the Flags section, choose one of the following options:

- Static Printers – always use the printer configured in the BarTender Commander
- Dynamic Printers – be able to choose a printer from the NetSuite WMS user interface

ODBC Connection

In the each of the following fields, enter the folder path where you want to save uploaded files. If necessary, click Upload next to the field to navigate to the appropriate location.

- WorldShip Path – where the worldship.csv file is saved
- External Label Path – where label files and picking and packing reports are saved
- Image Path – where packing list logos are saved
- UPS MDB Path – UPS database location where UPS tracking information is stored. You can only set this field if you have checked the Update UPS Tracking# box in the Flags section.
- FedEx MDB Path – FedEx database location where FedEx tracking information is stored. You can only set this field if you have checked the Update FedEx Tracking# box in the Flags section.
Electronic Data Interchange (EDI) Integration

Electronic Data Interchange (EDI) is the computer-to-computer exchange of business data in standard formats. Using EDI, information is organized according to a specified format set by both parties, allowing an automated computer transaction that requires no human intervention or rekeying on either end. The information contained in an EDI transaction set is, for the most part, the same as on a conventionally printed document. EDI standards in the US are set and published by the ASC X12 committee of ANSI. International EDI standards are known as EDIFACT standards.

You can optionally choose to configure NetSuite WMS for use with EDI if you are working with a NetSuite EDI partner to send advance shipping notices (ASN) to customers after items are shipped.

NetSuite WMS creates custom records with the required shipping data. This data is then read by the NetSuite EDI partner, who converts the data into an EDI document and sends the ASN to the customer.

For more information, see Confirming Customer Shipments in the NetSuite WMS User Guide.

Configuring the EDI integration is a two-step process: you must first enable the EDI system rule and then identify which customers or orders require an ASN when orders are shipped.

To enable the EDI system rule:

1. Log in to your NetSuite WMS account using the Warehouse Administrator role.
2. Go to Setup > Warehouse > System Rules.
3. Do one of the following:
   - To enable the ASN system rule for all warehouse locations, click Edit next to Generate EDI 856 outbound ASNs?.
   - To enable the ASN system rule to accommodate a business exception that applies to one warehouse location only, complete the following steps:
     1. Click View next to Generate EDI 856 outbound ASNs?.
     2. In the Actions menu, click Make Copy.
     3. In the Name field, enter Generate EDI 856 outbound ASNs?.
     4. In the Location field, select the appropriate warehouse location or warehouse sublocation.
4. In the Rule Value field, enter Y.
5. To activate the system rule, check the **Active** box.
6. Click **Save**.

**To identify which customers require ASNs:**

1. Log in to your NetSuite account using the Administrator role.
2. Go to Lists > Relationships > Customers.
3. Click **Edit** next to the customer that requires an ASN when an order is shipped.
4. Check the **ASN Required?** box.
5. Click **Save**.