

4.13 – Pick Processing

Introduction

The *Pick Processing* feature allows you to create a series of load orders that can be printed and distributed to your warehouse employees for order ‘picking’. Each load order contains all *Delivery Orders*, *Standing Orders*, and *Load Requests* per route. The *Pick Processing* feature is especially helpful for companies that have a high volume of orders daily.

Overview

Pick Processing can be found under the *Route* menu within *Route Manager*. The 6 available menu items are:

- ▶ ***Ad-hoc Stock Levels***: This option is used to establish daily stock levels.
- ▶ ***Generate Pick Tickets***: This option is used for generating tickets to be used by warehouse personnel for order staging.
- ▶ ***Confirm Pick***: This option is used to verify staged orders.
- ▶ ***Generate Load Orders***: This option creates *Load Orders* that will be processed on the handhelds.
- ▶ ***Print Delivery Manifest***: Currently in development.
- ▶ ***Maintain Calculator***: Currently in development.

Continue to the next section to learn the daily process for *Pick Processing*.

Daily Processing

The daily process for *Pick Processing* will be completed in the following order:

1. **Create Ad-hoc Stock Levels.**
2. **Generate Pick Tickets.**
3. **Confirm Picks.**
4. **Generate Load Orders.**

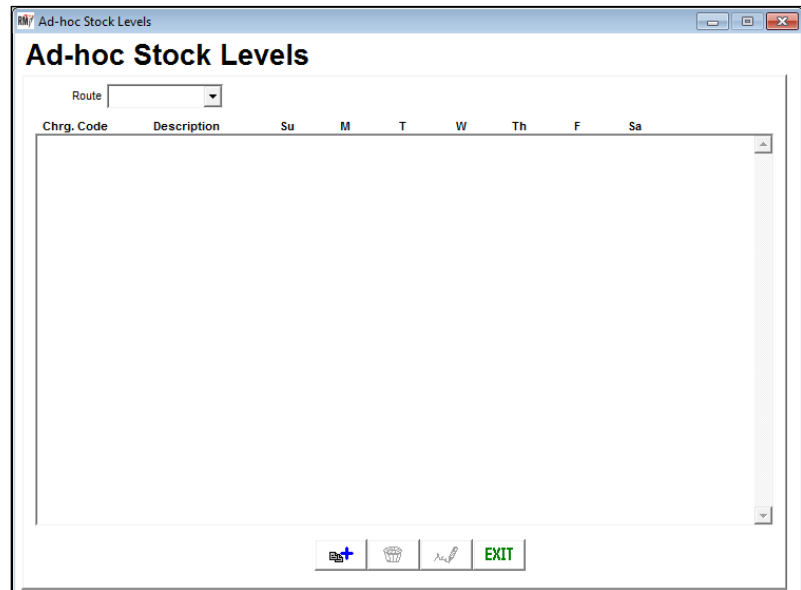
Each item is discussed below.

NOTE: There are multiple methods available for processing *Pick Tickets* in Route Manager. The following section will guide you through processing a standard *Pick Ticket* that only includes *Ad-hoc Stock Levels*. The *Additional Features* section will teach you how to process *Pick Tickets* that include *Standing Orders*, *Delivery Orders*, and *Telesales Orders*.

Ad-hoc Stock Levels

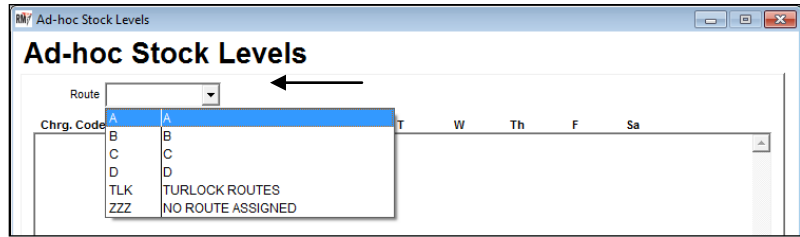
The *Ad-hoc Stock Levels* option is used to establish the products that should be pulled daily.

1. Browse to *Route > Pick Processing > Ad-hoc Stock Levels*.



The screenshot shows a software window titled "Ad-hoc Stock Levels". At the top, there is a "Route" dropdown menu. Below it is a table with columns for "Chrg. Code", "Description", and days of the week: "Su", "M", "T", "W", "Th", "F", "Sa". The table area is currently empty. At the bottom of the window, there is a toolbar with icons for adding (+), deleting (trash), and saving (floppy disk), along with an "EXIT" button.

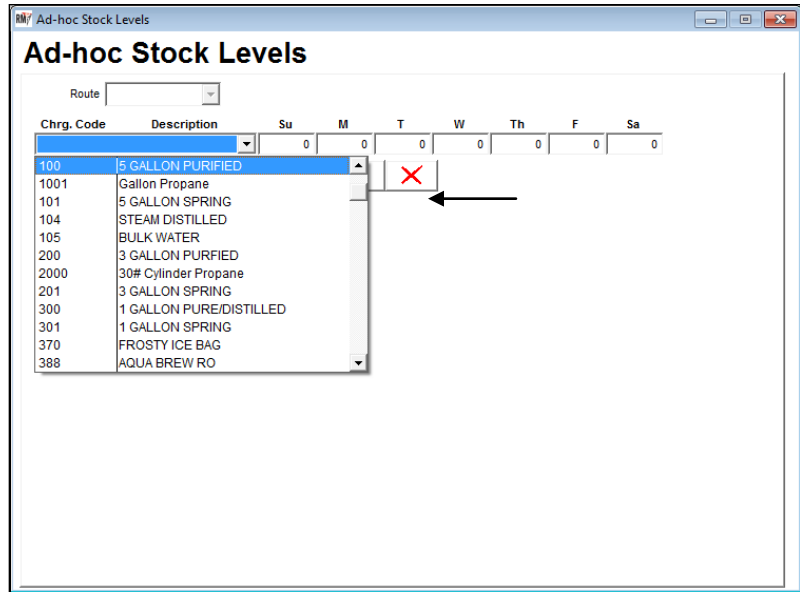
2. Select a *Route* from the drop-down list.



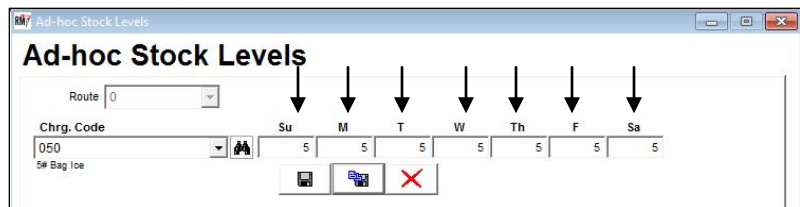
3. Choose the **Add** button on the screen.



4. Select a product code from the drop-down list.

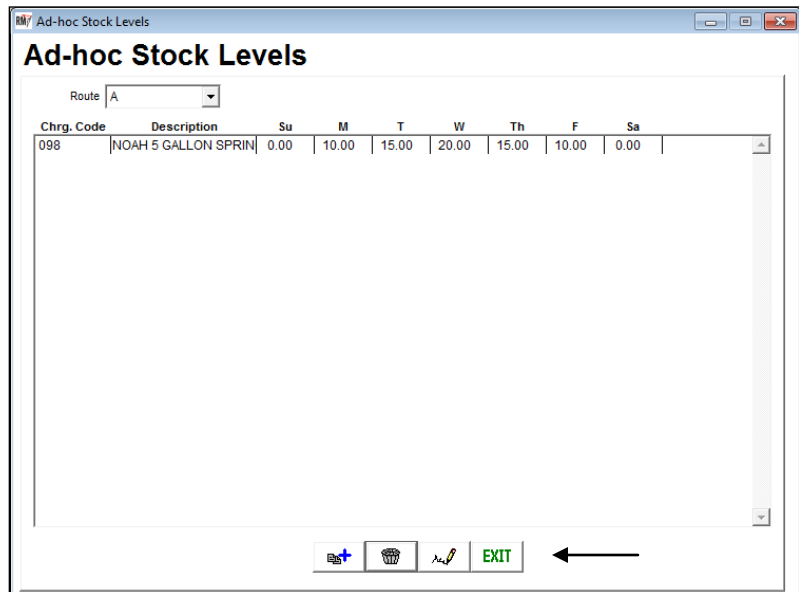


5. Enter the number of items you would like pulled each day of the week for the current route.



6. Select either **Save** or **More** to continue. Repeat the steps above for all of the products that should be pulled on the current route.

- Once you have completed this process, choose the Exit key.



NOTE: You can process additional routes prior to exiting the screen, if necessary.

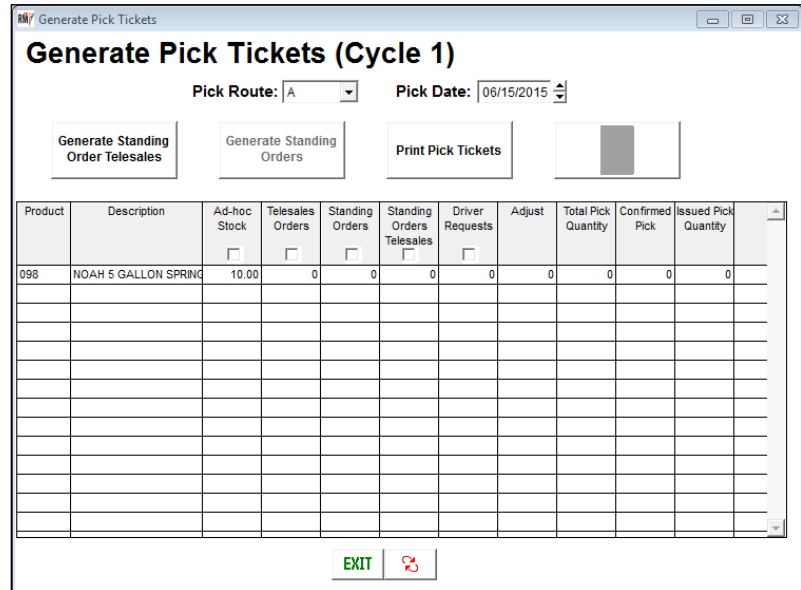
In the next section, the order created above will be processed as a *Pick Ticket*.

Generate Pick Tickets

The *Generate Pick Tickets* option is the central hub for all items that need to be pulled from inventory for a given route and date.

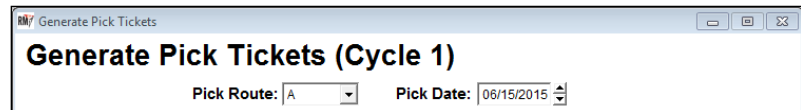
Follow the steps below to learn how to create a *Pick Ticket*.

1. Browse to *Route > Pick Processing > Generate Pick Tickets*.



Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
098	NOAH 5 GALLON SPRING	10.00	0	0	0	0	0	0	0	0

2. Select the *Pick Route* and *Pick Date* you would like to process.



3. Based on the *Stock Levels* entered on this route in the previous section, each product will be displayed on the screen, and the totals will be listed in the 'Ad-hoc Stock' field.

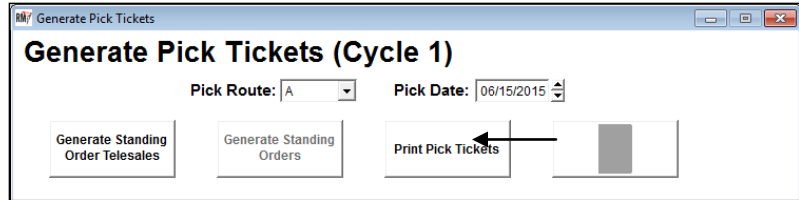
Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
098	NOAH 5 GALLON SPRING	10.00	0	0	0	0	0	0	0	0

NOTE: The fields listed in addition to *Ad-hoc Stock* will be addressed in the *Additional Features* section covered later.

- Check the **Ad-hoc Stock** box if you would like the current totals to be included on the *Pick Ticket*. The *Total Pick Quantity* field will be updated to reflect the running totals.

Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
098	NOAH 5 GALLON SPRING	<input checked="" type="checkbox"/> 10.00	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	0	10	0	0

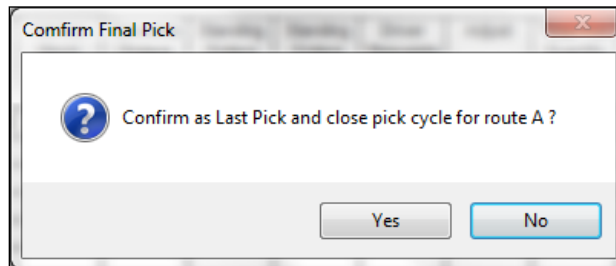
- Select the **Print Pick Tickets** option to print the pick list.



- Review and print the pick ticket.

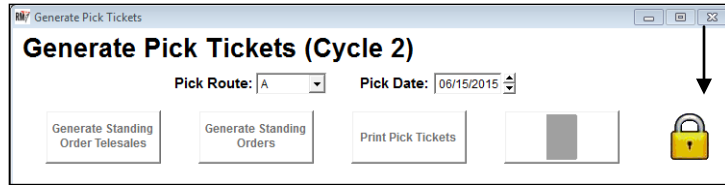
Pick Ticket: Cycle 1		Time Stamp: 01:29PM	
Route A		Wednesday 07/01/2009	
Pick Ticket ID: 20T0SW05S			
Product	Description	To Be Picked	Picked
S15	5 Gallon Spring	50	

- After the report has been printed, a message similar to the following will be displayed on the screen:



NOTE: This message is displayed because it may be necessary to update *Pick Tickets* throughout the day. By choosing No, you will be able to access this record again to confirm new totals entered. Once the pick ticket has been closed, it is assumed that no further entries will need to be made on the order.

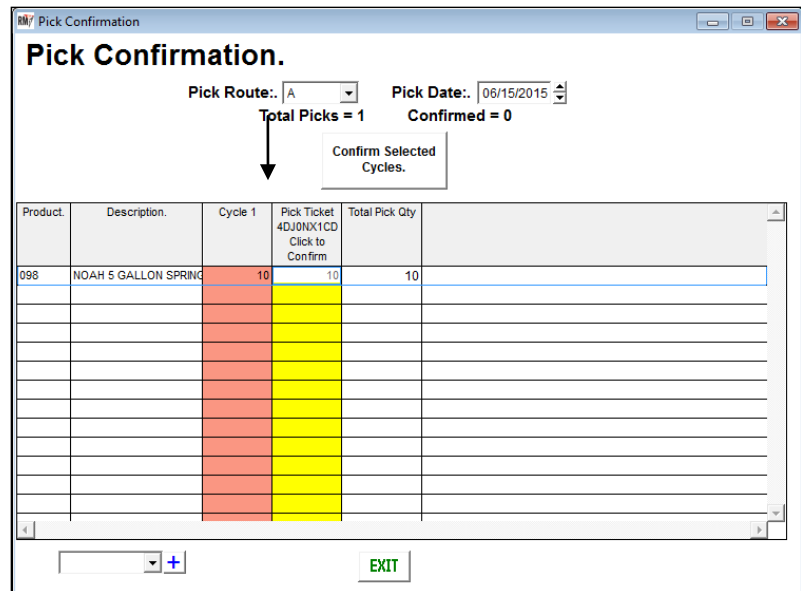
8. Choose **Yes** to lock the ticket. A lock will appear on the screen.



NOTE: The totals on the order have now been moved to the *Issued Pick Quantity* field.

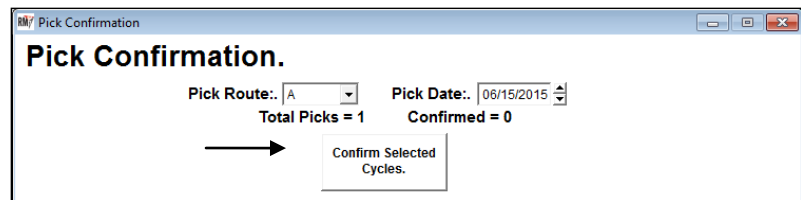
9. Choose the **Exit** key.
The order has been generated and printed at this point. After the warehouse employee has staged the order, the totals will need to be confirmed within Route Manager using the *Confirm Pick* option covered next.

- To confirm the products picked for the order, simply click on the header that displays the ticket number on the screen. This will confirm all of the listed quantities and highlight the column in yellow.

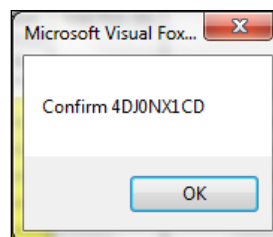


NOTE: If the quantity pulled does not match the amount ordered, an adjustment can be made in each field under the pick ticket number.

- Select the **Confirm Selected Cycles** button to complete the process.



- A confirmation message similar to the following will be displayed with an assigned *Pick ID*. Click **OK** to continue.



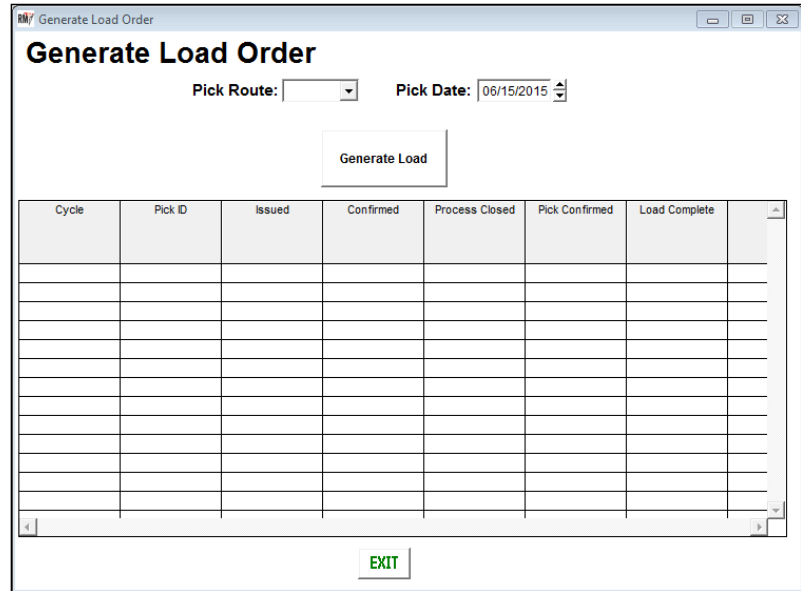
- Choose the **Exit** key.

The order has now been generated, processed, and verified. This order can now be processed as a *Load Order* that can be received on the handheld using the *Generate Load Orders* option covered next.

Generate Load Orders

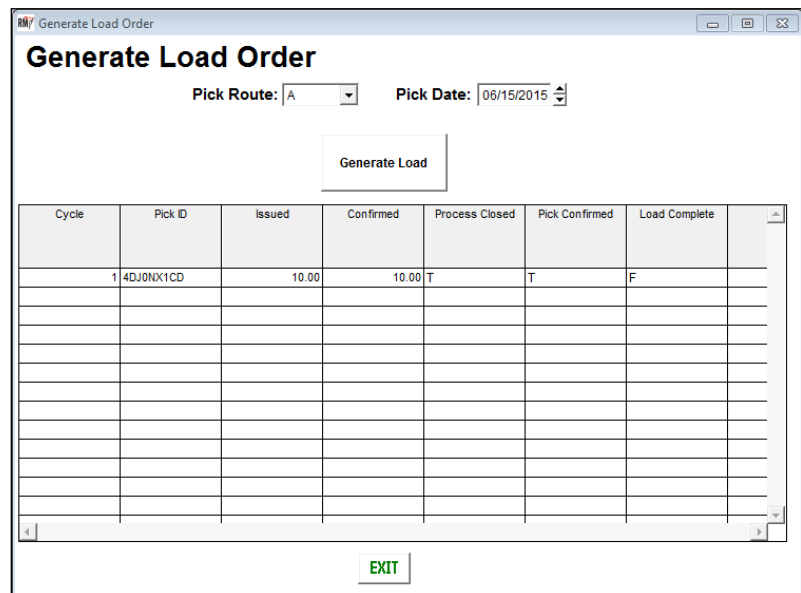
The *Generate Load Orders* option allows you to create *Load Orders* that will be received by drivers on the handhelds.

1. Browse to *Route > Pick Processing > Generate Load Orders*.



Cycle	Pick ID	Issued	Confirmed	Process Closed	Pick Confirmed	Load Complete

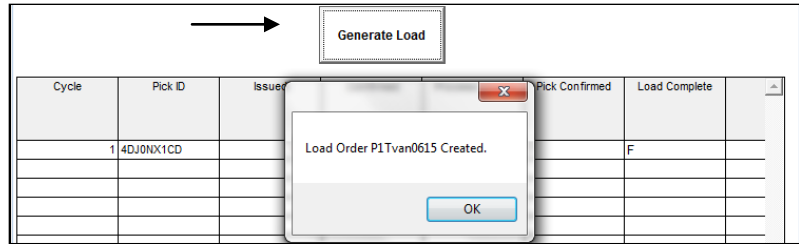
2. Select the **Pick Route** and **Pick Date** you would like to process, and any associated *Load Orders* will automatically be displayed.



Cycle	Pick ID	Issued	Confirmed	Process Closed	Pick Confirmed	Load Complete
1	4DJ0NX1CD	10.00	10.00	T	T	F

3. Select the *Generate Load* button to create *Load Orders* for each *Pick ID* displayed. A confirmation

similar to the following will be displayed with an associated *Load Order ID*. Click **OK** to continue.



4. Choose the **Exit** key.

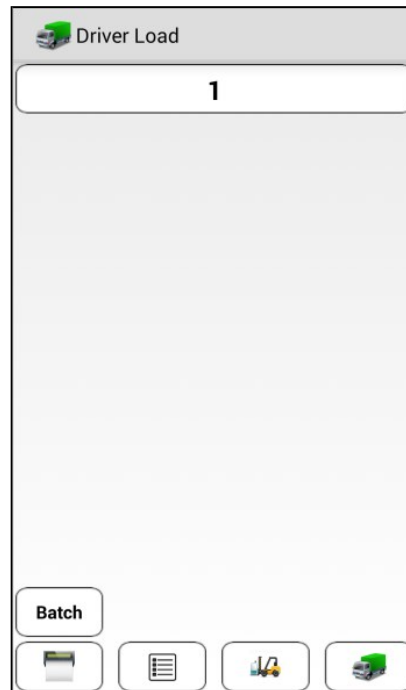
The order has been created, picked, and processed for the handheld. The next section will guide you through the handheld process.

Handheld Process


Each driver will receive each *Load Order* on the handheld after verifying the correct quantities have been loaded.

NOTE: In order to be able to accept Load Orders on the handheld, *Enhanced Inventory* will need to be enabled under *File > Branch Setup > Desktop* tab. Refer to *Chapter 3.10* of the *Supplemental Guide* for further information on the *Enhanced Inventory* feature.

1. Navigate to *Load Truck > Morning > Load Truck (or Driver Load)* and login to view the *Choose Bay* screen. Select the **Truck** button.



- The current *Load Orders* associated with this route will be displayed on the bottom portion of the screen.

 Truck Check Out

Truck ID 11

Trailer

Beginning Miles 25446

Control Number 0

Beginning Readings


Compartments

Select Load Order

Date	Route	Received	Load Order
11/6/2015	1	No	5110600001
2/23/2016	0	No	6022300002
2/23/2016	0	No	DEFLOAD_47

Receive

- Select the correct order and tap **Receive**.

 Truck Check Out

Truck ID 11

Trailer

Beginning Miles 25446


Control Number 0

Beginning Readings

Compartments


Select Load Order

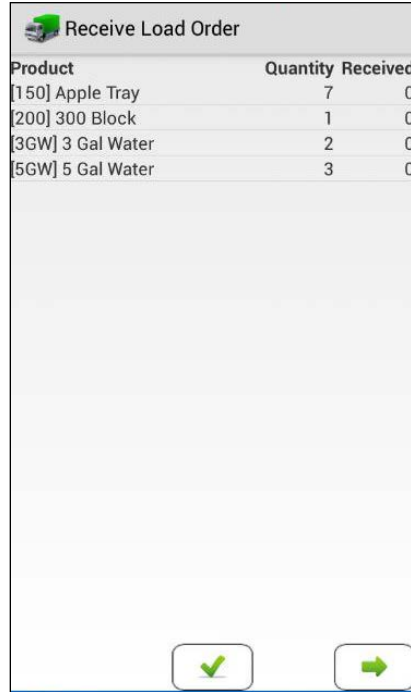
Date	Route	Received	Load Order
11/6/2015	1	No	5110600001
2/23/2016	0	No	6022300002
2/23/2016	0	No	DEFLOAD_47



Receive

The products associated with the order will be displayed.

You can edit the order or simply choose  to accept the order on the truck.

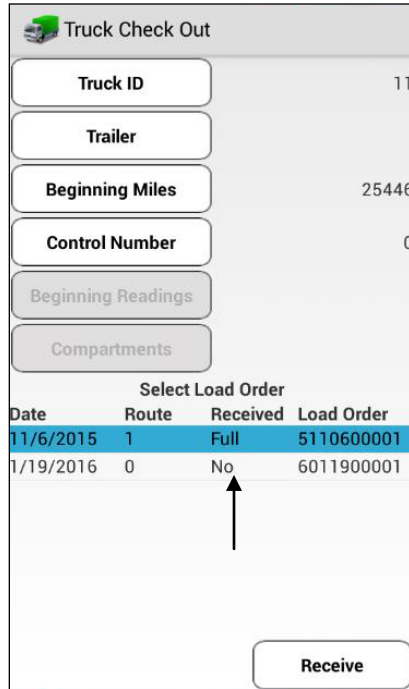


Product	Quantity Received
[150] Apple Tray	7 0
[200] 300 Block	1 0
[3GW] 3 Gal Water	2 0
[5GW] 5 Gal Water	3 0

At the bottom of the screen, there are two buttons: a green checkmark icon and a green arrow icon.

4. Select the **Green Arrow** to continue.

5. *Full or Partial* will appear next to all received orders on the truck.



Truck Check Out

Truck ID: 11

Trailer:

Beginning Miles: 25446

Control Number: 0

Beginning Readings:

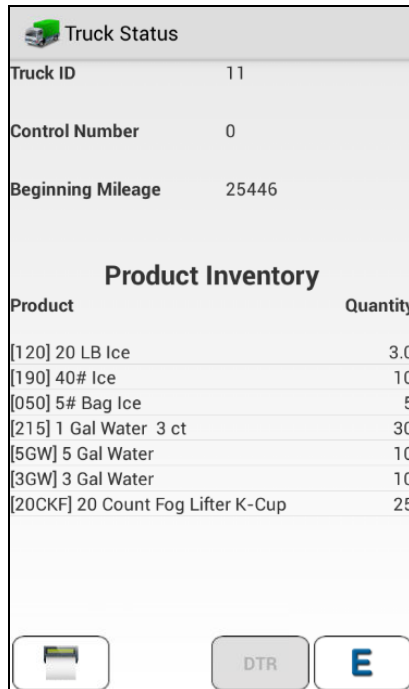
Compartments:

Select Load Order

Date	Route	Received	Load Order
11/6/2015	1	Full	5110600001
1/19/2016	0	No	6011900001

Receive

6. This order has now been added to the truck, and is reflected within the *Truck Status* button on the *Main Menu*.



Truck Status

Truck ID: 11

Control Number: 0

Beginning Mileage: 25446

Product Inventory

Product	Quantity
[120] 20 LB Ice	3.0
[190] 40# Ice	10
[050] 5# Bag Ice	5
[215] 1 Gal Water 3 ct	30
[5GW] 5 Gal Water	10
[3GW] 3 Gal Water	10
[20CKF] 20 Count Fog Lifter K-Cup	25

DTR E

This completes a full cycle of processing a *Pick Ticket* within Route Manager. In the sections that follow, alternate configurations and additional features are covered.

Additional Features

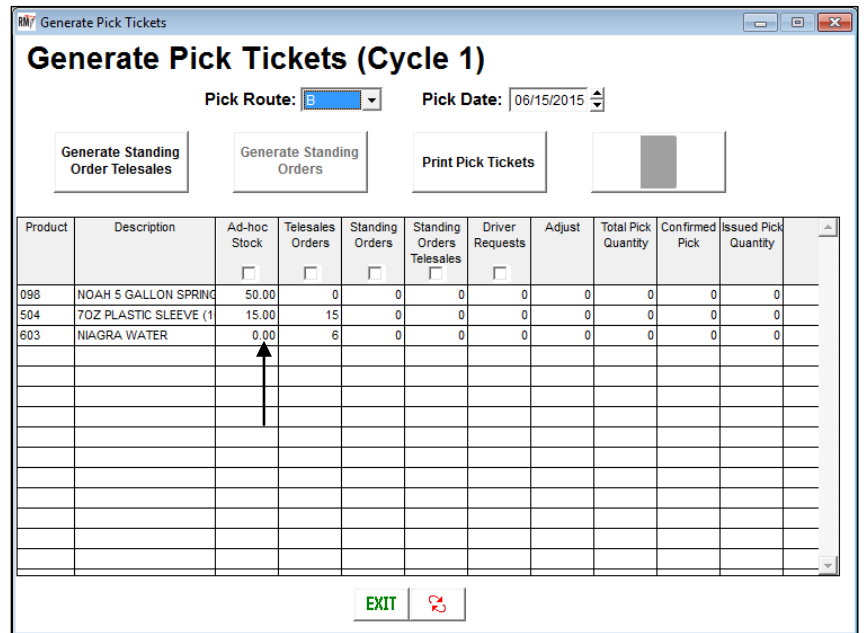
The Pick Processing feature offers many additional features and alternate configurations. This section addresses these items.

Generate Pick Tickets Options

Along with the *Ad-hoc Stock* option addressed earlier, the *Generate Pick Ticket* screen includes *Standing Orders*, *Delivery Orders*, and *Telesales Orders* that can be included in each *Pick Ticket*.

Telesales Orders

In the following example, a *Delivery Order (Telesales Order)* exists on this route for product code '504'.



Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
098	NOAH 5 GALLON SPRING	50.00	0	0	0	0	0	0	0	0
504	7OZ PLASTIC SLEEVE (1	15.00	15	0	0	0	0	0	0	0
603	NIAGRA WATER	0.00	6	0	0	0	0	0	0	0

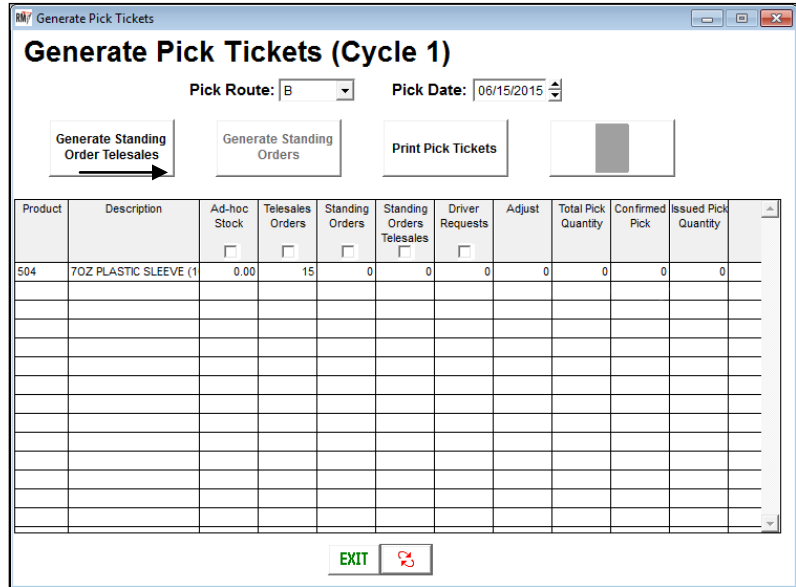
In order to process the *Telesales Order* with the *Ad-hoc Stock*, simply check the *Telesales Orders* column. The items within the *Telesales Orders* column will be added to the *Total Pick Quantity* on the screen.

Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
098	NOAH 5 GALLON SPRING	<input checked="" type="checkbox"/> 50.00	<input checked="" type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	0	50	0	0
504	7OZ PLASTIC SLEEVE (1	15.00	<input checked="" type="checkbox"/> 15	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	0	30	0	0
603	NIAGRA WATER	0.00	<input checked="" type="checkbox"/> 6	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	0	6	0	0

Standing Orders

Standing Orders represent items assigned in the *Default Products* tab of each customer's account with a pre-established quantity.

In order to include *Standing Orders* on the *Pick Ticket*, choose the **Generate Standing Orders** button on the screen.



Based on the selection above, items have been added to the *Standing Orders* column.

Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
504	7OZ PLASTIC SLEEVE (1)	0.00	15	0	0	0	0	0	0	0
603	NIAGRA WATER	0.00	0	5	0	0	0	0	0	0

Simply check the *Standing Orders* column to include the items on the *Pick Ticket*. The items will be added to the *Total Pick Quantity*.

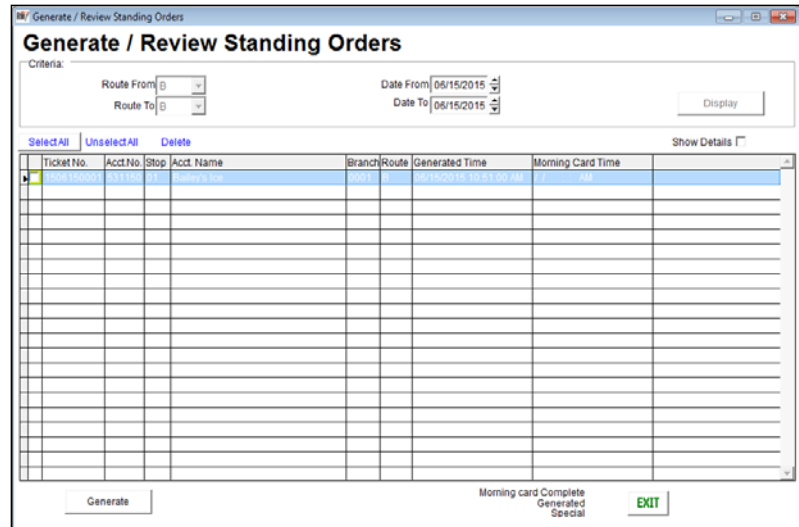
Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
504	7OZ PLASTIC SLEEVE (1)	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	15	0	0
603	NIAGRA WATER	0.00	0	5	0	0	0	5	0	0

Standing Orders Telesales

The *Standing Orders Telesales* option is used as part of the *Weekly Standing Orders* feature in RMA. In order for this option to be available on the screen, you must enable the 'Use Weekly Standing Orders' option within *File > Branch Setup > Desktop*.

NOTE: For further information on the *Weekly Standing Orders* option, refer to *Chapter 4.12* of the *Supplemental Guide*.

The *Generate / Review Standing Orders* screen will be displayed with any orders that apply to the current route and date. Make your selections and select the **Generate** button to continue.



NOTE: For more information on this function, refer to *Chapter 4.12 of the Supplemental Guide.*

Choose **Exit** to continue.

The *Standing Order Telesales* column will be updated to reflect any new items added for *Weekly Standing Orders*.

Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
098	NOAH 5 GALLON SPRING	50.00	15	0	0	0	0	0	0	0
504	7OZ PLASTIC SLEEVE (1	15.00	15	0	0	0	0	0	0	0
603	NIAGRA WATER	0.00	6	0	0	0	0	0	0	0
700	5 GALLON DEPOSIT	0.00	5	0	0	0	0	0	0	0

To include the *Weekly Standing Orders* on the *Pick Ticket*, simply check the *Standing Orders Telesales* column. The items will be added to the *Total Pick Quantity*.

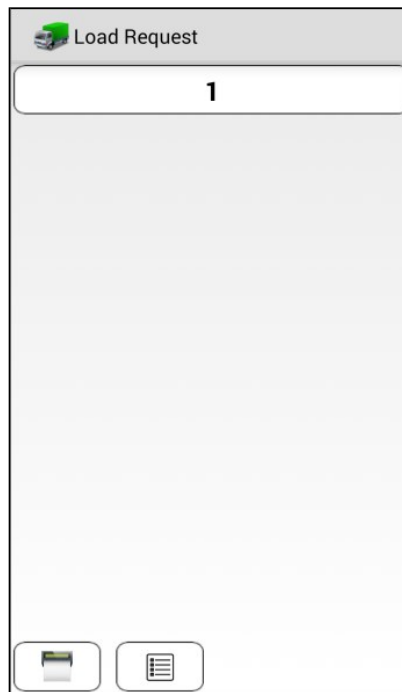
Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
098	NOAH 5 GALLON SPRING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	65	0	0
504	7OZ PLASTIC SLEEVE (1	15.00	15	0	0	0	0	30	0	0
603	NIAGRA WATER	0.00	6	0	0	0	0	6	0	0
700	5 GALLON DEPOSIT	0.00	5	0	0	0	0	5	0	0

Driver Requests

The driver can enter a *Load Request* on the handheld by navigating to *Load/Unload Truck > Morning*, and tapping *Load Req.*



The driver will enter the item request using the *Choose Bay* screen.



Once complete, this information will be uploaded to the desktop during the *Afternoon Card* process and a report will be provided automatically.

The products and quantities entered will also be displayed on the *Generate Pick Tickets* screen for the date and route entered.

Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity	
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
098	NOAH 5 GALLON SPRING	50.00	15	0	0	0	0	65	0	0	
504	7OZ PLASTIC SLEEVE (1	15.00	15	0	0	0	0	30	0	0	
603	NIAGRA WATER	0.00	6	0	0	0	0	6	0	0	
700	5 GALLON DEPOSIT	0.00	5	0	0	0	0	5	0	0	

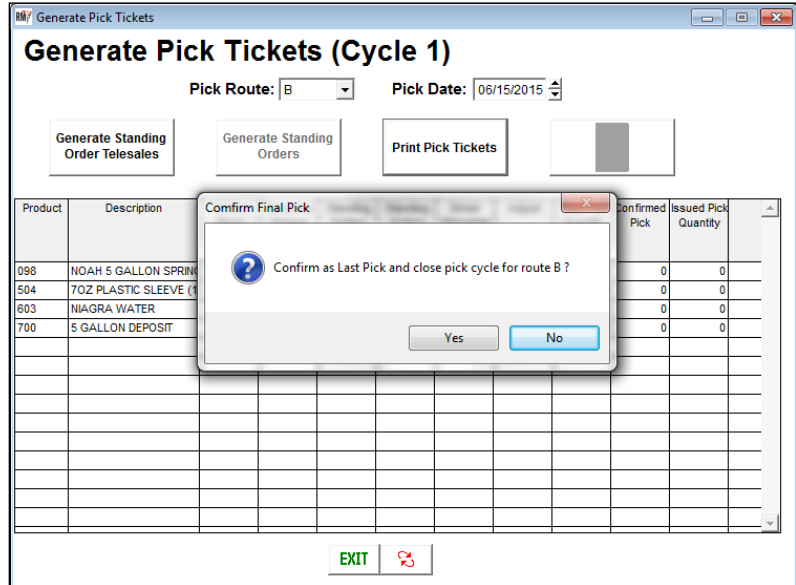
To include the *Driver Requests* on the *Pick Ticket*, simply check the *Driver Requests* column. The items will be added to the *Total Pick Quantity*.

Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity	
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
098	NOAH 5 GALLON SPRING	50.00	15	0	0	0	0	65	0	0	
504	7OZ PLASTIC SLEEVE (1	15.00	15	0	0	0	0	30	0	0	
603	NIAGRA WATER	0.00	6	0	0	0	0	6	0	0	
700	5 GALLON DEPOSIT	0.00	5	0	0	0	0	5	0	0	

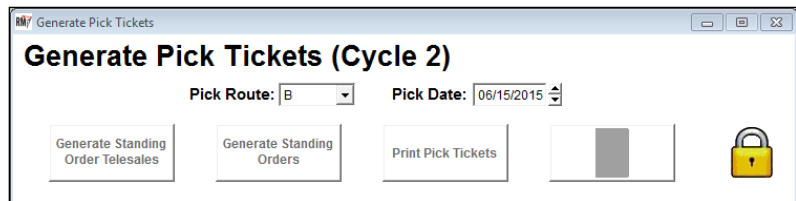


Multiple Cycles

As you generate and print *Pick Tickets*, a prompt similar to the following will appear:



If you would like to close the current *Pick Ticket* for the day, choose **Yes**. This will lock the *Pick Ticket*, as shown below:

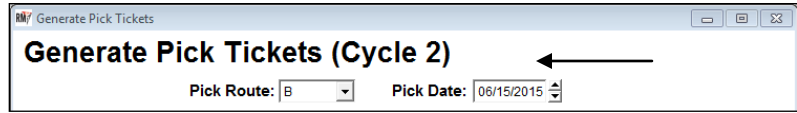


NOTE: The *Pick Ticket* can be re-opened by double-clicking on the lock, if necessary.

If **No** is selected on the 'Confirm as Last Pick' message, the ticket will remain open. Allowing you to add more products to the ticket as needed.

Each time a ticket is printed from within this screen, the most recent quantities entered will print—not the total for all products on the ticket.

Each entry made to an existing ticket is considered a 'Cycle.' The current *Cycle* listed reflects the number of entries made (i.e., Cycle 1, Cycle 2, etc.).

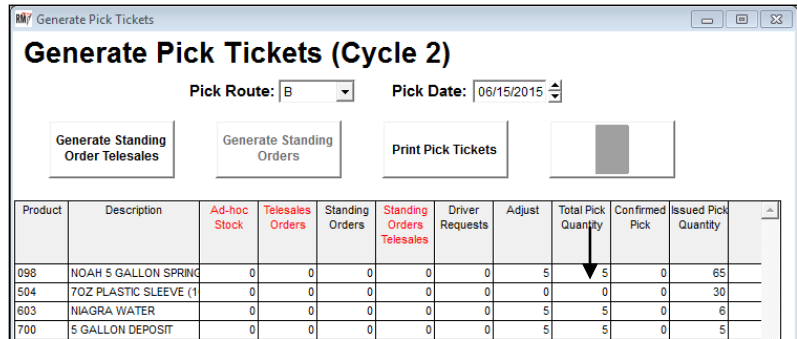


Generate Pick Tickets (Cycle 2)

Pick Route: B Pick Date: 06/15/2015

Adjustments

If a manual adjustment needs to be made within the *Generate Pick Tickets* screen, you can do so by entering the adjustment in the **Adjust** field.



Generate Pick Tickets (Cycle 2)

Pick Route: B Pick Date: 06/15/2015

Buttons: Generate Standing Order Telesales, Generate Standing Orders, Print Pick Tickets

Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
098	NOAH 5 GALLON SPRING	0	0	0	0	0	5	5	0	65
504	7OZ PLASTIC SLEEVE (1	0	0	0	0	0	0	0	0	30
603	NIAGRA WATER	0	0	0	0	0	5	5	0	6
700	5 GALLON DEPOSIT	0	0	0	0	0	5	5	0	5

For example: an adjustment of '10' is entered below, bringing the combined quantity to '60' for the item.

Product	Description	Ad-hoc Stock	Telesales Orders	Standing Orders	Standing Orders Telesales	Driver Requests	Adjust	Total Pick Quantity	Confirmed Pick	Issued Pick Quantity
098	NOAH 5 GALLON SPRING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10	15	0	70
504	7OZ PLASTIC SLEEVE (1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0	30
603	NIAGRA WATER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0	11
700	5 GALLON DEPOSIT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0	0	10

Advanced Options

There are a series of advanced options within *Branch Setup* that change functions within the *Pick Processing* screen. These items can be found under *File > Branch Setup > Defaults*.

Each option is defined below.

Pick Ticket Options

Use Calculated Mode

Show Perpetual On Board Value on Load Screen

Include Delivery Orders and Ad-hoc in 1st Pick Cycle

Allow Standing Order Generation in 1st Pick Cycle

Use Calculated Mode: This option enables *Calculated Mode* within the *Generate Pick Tickets* screen. *Calculated Mode* allows you to review product totals with a higher level of detail within the *Generate Pick Tickets* screen.

NOTE: All of the following options can only be used in *Calculated Mode*.

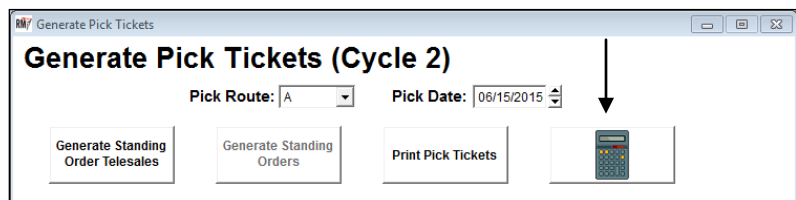
Show Perpetual On Board Value on Load Screen: Select this option to include *Perpetual Inventory* totals in the *Calculated Pick Quantities* screen.

Include Delivery Orders and Ad-hoc in 1st Pick Cycle: Select this option to include quantity information for *Ad-hoc Stock* and *Telesales Orders* on the *Generate Pick Tickets* screen during *Cycle 1*.

Allow Standing Order Generation in 1st Pick Cycle: Select this option to enable the *Generate Standing Order Telesales* button within the *Generate Pick Tickets* screen during *Cycle 1*.

Calculated Mode

With the *Calculated Mode* option enabled within *Branch Setup*, the calculator icon is enabled within the *Generate Pick Tickets* screen.



The screenshot shows the 'Generate Pick Tickets (Cycle 2)' window. At the top, there are fields for 'Pick Route: A' and 'Pick Date: 06/15/2015'. Below these are four buttons: 'Generate Standing Order Telesales', 'Generate Standing Orders', 'Print Pick Tickets', and a calculator icon. A black arrow points to the calculator icon, indicating it is enabled.

Load Charge: The quantity ordered for the current cycle of the current route and date.

Total Load Charge: The quantity ordered for all cycles for the current route and date.

Summary

The *Weekly Standing Orders* option provides more flexibility with order management and processing. If you have any questions regarding this feature, please contact Advantage Route Systems.

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Series 7: Version Date, May 3, 2016