



## Picking Management OVERVIEW

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## Rules

Rules, found at the top of the Sales Order page, allow actions to be automatically applied to Sales Orders as they come in.

Setting up a rule is done in two steps: First, choosing which actions you want automated, and second, choosing the conditions which are evaluated to trigger the actions.

For example, you may decide that you want “Royal Mail” to be automatically assigned as the carrier for SO’s that ship to the EU:

1. Create a rule assigning “Royal Mail” as carrier
2. Next add the condition, “*if the SO shipping address is in EU*”.

With this rule created, any new SO that comes in with a shipping address in the EU will be assigned the carrier “Royal Mail”

The screenshot shows a web interface titled 'Rules'. Below the title is a blue header bar with the text 'SO Rules'. To the right of this bar is a green button labeled 'New Rule' with a red border. Below the header bar is a table with two columns: 'Name' and 'Assign Carrier'. The first row of the table has a red icon and the text 'Test' in the 'Name' column, and is empty in the 'Assign Carrier' column.

To get started with rules, we create a new rule, and add the name and set the Chaining for the rule. Chaining for the rule sets whether the action is triggered only when ‘all’ conditions are true, or when ‘any’ of the conditions are true.

For example, if 2 conditions exist, “*price is greater than £10*”, and “*shipping address is in EU*”:

SO Details \ Chaining	‘all’	‘any’
Price: <b>£11</b> , Shipping Address: <b>Paris</b>	Action is triggered	Action is triggered
Price: <b>£9</b> , Shipping Address: <b>Paris</b>	Action is <b>NOT</b> triggered	Action is triggered
Price: <b>£11</b> , Shipping Address: <b>New York</b>	Action is <b>NOT</b> triggered	Action is triggered
Price: <b>£9</b> , Shipping Address: <b>New York</b>	Action is <b>NOT</b> triggered	Action is <b>NOT</b> triggered

Next, we add the rule action:



Rules » Rule Details

Rule Details Save

Any 1 ☐  2 3 -Skip  
 Rule Name Chaining Prevent Confirmation Append Note Note type Assign Carrier

4  5 -None 6  7  
 Notify Users Assign tags Packaging Set Due date (From order date)

#	Name	Action
1	Prevent Confirmation	Stops this Sales Order from being Confirmed
2	Add Note	Adds a Note to the Sales Order, with the option to choose a Note type
3	Assign Carrier	Set the Carrier for this SO
4	Notify	Notify a user or group of users that the SO has been received
5	Add Tags	Add tags to this SO
6	Set Packaging	Set packaging type to be used for this order
7	Set Due Date	Specify the number of days from today to set the due date to, eg 4 will set the due date to 4 days after the SO is received

The second step is to add conditions that are evaluated to trigger the actions.

Conditions Add Group Add Condition Add Item Condition

Name	Value
------	-------

Upon clicking Add Condition, we can choose a property from the SO to make a condition with. We then choose if it is positive or negative (eg, "Price is greater than £100" or "Price is not greater than £100"). Next, we choose the comparison operator (eg, Equals, Greater Than etc), and finally enter the value to compare to.

Rule Details Save

Equals   
 Document Id





### TIP:

The general formula is: *{SO info} {is/is not} {comparison} {test value}*

For example:

*"Order date" + "is not" + "Equals" + "12/03/2020"*

will create a condition that evaluates to true when the SO order date is not 12th March 2020

Add Condition and Add Item Condition are the same, except that Add Item Condition, adds a condition which checks the lines on the SO, instead of checking the SO in general. Eg *"if Product Price is greater than £100"* is an Item Condition, and *"if Total value is greater than £125"* is a regular Condition. If any line in the SO meets the condition, then it will evaluate as true.

Add Group allows adding a group of conditions to a rule that are evaluated together to determine whether they activate the action.

When adding a group, you first choose the Chaining for the group. This is similar to the Chaining for the rule but is totally independent. It defines how the individual conditions in the group are evaluated together.

Chaining for the group sets whether the group evaluates to true only when **'all'** conditions are true, or when **'any'** of the conditions are true.

Conditions (Chaining: All)		Edit Group	Add Condition	Add Item Condition	Delete Group
Name	Value				

Just like the rule itself, regular Conditions and Item Conditions can be added to a group.





## TIP:

Example usage:

Rule Details	
Test	Any
Rule Name	Chaining
Notify Users	Assign tags
Conditions	T1
Document Id	Equals 4
Conditions (Chaining: All)	Set Due date (From order date)
Total quantity	Equals 1
Product Weight (Gr)	Less than 400g

In this rule, we can see that the Chaining for the rule is 'Any', so we know if any of the conditions evaluate to true the action will be triggered.

There is a group, however, which has a Chaining of 'All'. This means it will only evaluate to true if all the group conditions evaluate to true.

For example:

SO details	Outcome
Document ID: 4 Total quantity: 2 Product Weight: 350g	Action is triggered (as Document ID is 4)
Document ID: 17 Total quantity: 2 Product Weight: 350g	Action is <b>NOT</b> triggered (as Document ID is not 4, and the group evaluates to false (as Total quantity is not 1))
Document ID: 17 Total quantity: 1 Product Weight: 350g	Action is triggered (as Total quantity is 1 AND Product Weight is less than 400g)
Document ID: 1 Total quantity: 1 Product Weight: 450g	Action is <b>NOT</b> triggered (as Document ID is not 4, and group evaluates to false (as Product Weight is more than 400g))



## Queues

The screenshot shows the 'PO | Purchase Orders' interface. At the top right, there are buttons for 'Forecasting Report' and 'New Purchase Order'. Below these is a search bar with a 'Search' button and an 'Advanced Search' link. A red box highlights the search filters: 'Warehouse' (All), 'Type' (Any), 'PO Dates' (21/01/2020), 'Vendor' (empty), 'Status' (New, Confirmed), and 'Receiving' (Any). Below the filters is a table with columns: PO, Vendor, Warehouse, Status, Order Date, Currency, Net Total, and Received. The first row shows PO200098, Rolfson, Tillman and Greenholt, Main Warehouse, Confirmed, 22/01/2020, USD, 98.95, and Pending.

We can save searches into a Queue for quick access. We can then set a specific queue (saved search) as the default, so that when going to the SO/PO List that queue will automatically activate.

This screenshot is similar to the previous one, but it shows the 'Save as queue' button highlighted in red in the bottom right corner of the search filters area. The search filters are the same as in the previous screenshot.

In the above image we have searched for a specific date and for PO's with a status of 'New' or 'Confirmed'. After searching we see the 'Save as queue' button.

The 'Queue Details' dialog box is shown. It has a 'Save' button at the top right. Below it is a section 'Convert selected dates to dynamic dates:'. There is a date input field with '19/01/2020' and a dropdown menu with 'Keep' selected. Below this is a text input field for 'Name' and a checkbox for 'Shared' with a question mark icon.

We can now enter a name for the queue and set whether it should be shared amongst all users. If a date was part of the search, then options appear to dynamically change the searched for date based on when the queue is used (date of execution) or, select 'Keep' to fix the date.



The screenshot shows a search interface. At the top, there is a purple header bar with a white search bar (1) and buttons for 'Advanced Search' and 'Search'. Below the header, there is a 'Vendor' dropdown menu and a 'Queue 1' dropdown menu (2). The 'Queue 1' dropdown is currently open, showing a list of queues.

Now we can see a white bar in the search area (1), click it and we can see all the queues that

have been saved (2). Click on a queue to use its search parameters.



### TIP:

In the dropdown (accessed by clicking the white bar in the search area) we can see each Queue and beside it a count of the items in the Queue. This can be used to have a peek at the status of each Queue

Active	57
Dispatch Ready	2

These counts can be added to the KPI dashboard for easy monitoring of Queues

When we are viewing a queue, we see that it appears in the Queue selection at the top, and that we have two new options, 'Remove this queue' and 'Set as default queue'. Remove this queue will delete it from the system and Set as default will result in this queue being activated by default when the list page is viewed.

The screenshot shows the queue view interface. At the top, there is a purple header bar with a white search bar (1) and buttons for 'Advanced Search' and 'Search'. Below the header, there is a 'Queue 1' dropdown menu (2) and a 'Status' dropdown menu. The 'Queue 1' dropdown is currently open, showing a list of queues. The 'Remove this queue' and 'Set as default queue' options are highlighted in the dropdown menu.





## Grouped Pickings

Grouped Pickings allows multiple Sales Orders Picking's to be consolidated for more efficient picking.



### TIP:

A good way to manage order dispatch is with a Queue. The Queue should look something like the one below, as these settings ensure that only SO's that are ready to be packed and shipped are shown. The important fields have been outlined in red.

The screenshot shows the 'Dispatch Ready' search interface. Key fields are highlighted with red boxes:

- Status:** Set to 'Confirmed'.
- Packing:** Set to 'Pending'.
- Carrier Label:** Set to 'Complete'.
- Sorting Orders:** Set to 'Due Date'.

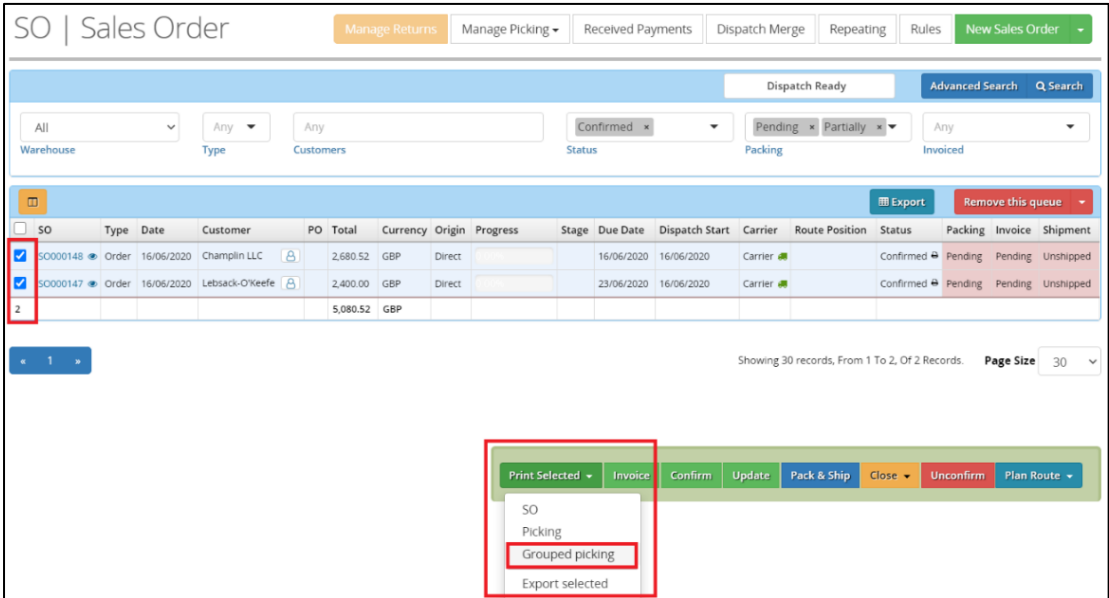
Other visible fields include Warehouse, Type, Customers, Order date range, PO Reference, Currency, Channel, Order Total, Tagged, Due date range, Shipment Status, Due Only, Backorders, Parked, Printed, Sales Rep, Contains Categories, Contains Brand, Contains Label, Contains product, Product state, Assigned Carrier, and Cut-off hour.

Most important is the Carrier Label status, which must be Complete for this item to be considered ready to be dispatched.

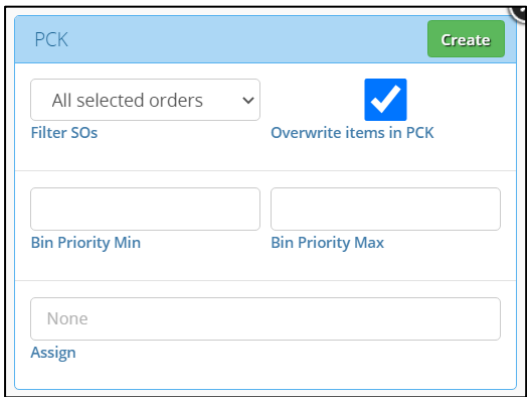
Grouped Dispatch is a good use case for using Rules to automatically define the carrier, confirm the sales order and tagging, amongst other actions. For example, a rule which appends the tag "Express" to orders with a due date within 2 days, will enable further filtering in the Dispatch Ready Queue (using the Tagged field) to show the most urgent orders. In any case, the Queue should be set to sort orders by due date to show the most time sensitive orders first.



To create a Grouped Picking (PCK) we need to find the relevant SO's on the Sales Order page. We can select multiple SO's using the checkboxes in the leftmost column. We then use the floating menu to open the "Print Selected" menu, where we click the "Grouped picking" option.



We see various options for the Group picking:



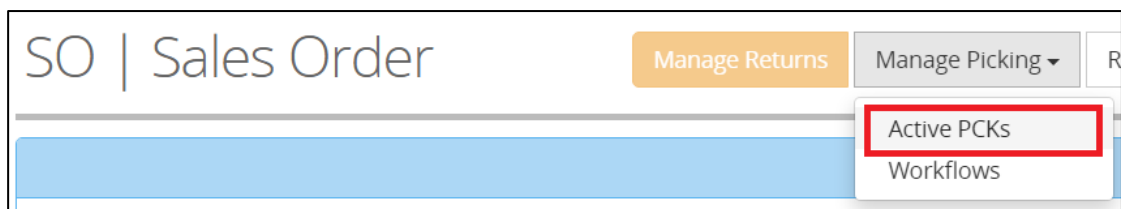
Field	Usage
Filter SO's	<p>There are 3 options available, 'All', 'Single' or 'Multi':</p> <p><i>Single Item</i> will only create the PCK for SO's that are for a single line – this is useful so that at the packing station the packer will not have to look through multiple totes to find items for a single order</p> <p><i>Multi Item</i> will create a PCK only for SO's with multiple lines, this is used to complement the Single Item strategy</p>



<b>Overwrite items in PCK</b>	<p>This option overwrites an existing PCK when there are lines that have not been dispatched from the earlier PCK. Any outstanding lines from the earlier PCK will be added to the new PCK</p> <p>If this option is not used, the new PCK will only start from where the previous PCK stopped. The old PCK will still be used needed to pick the outstanding lines</p>
<b>Bin Priority Min/Max</b>	<p>Can be used to limit which bins a picker will be sent to, to allow for more efficient picks, such as limiting a picker to a specific aisle in the warehouse</p> <p>The Bin Priority will never break up a single Sales Order with multiple lines into multiple PCK's</p>
<b>Assign</b>	Assign specific warehouse agents to perform this pick. The PCK will appear in their pick queue for them to claim and to pick

Clicking "Create" will generate the PCK and add it to relevant warehouse agents pick queues.

To view existing PCK's we go to Manage Picking at the top of the Sales Order list page



This shows any outstanding PCK's. PCK can be printed by clicking the printer in the rightmost column. Pending indicates that no warehouse agent has yet claimed the PCK from their queue+

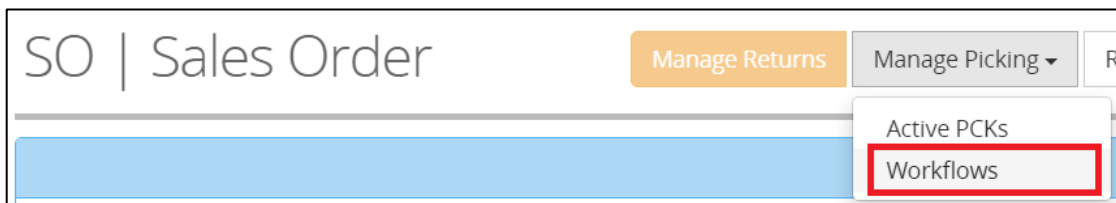
Active PCK									
<input type="checkbox"/>	PCKID	Created	Status	Workflow	Queued	Assignee	Assign Date	Orders	Pending Orders
<input type="checkbox"/>	PCK37	16/06/2020 11:43	Pending					2	2
<input type="checkbox"/>	PCK35	16/06/2020 10:23	Pending					1	1
<input type="checkbox"/>	PCK34	16/06/2020 10:22	Pending					1	1
<input type="checkbox"/>	PCK32	27/04/2020 20:58	Pending					1	1

## Workflows

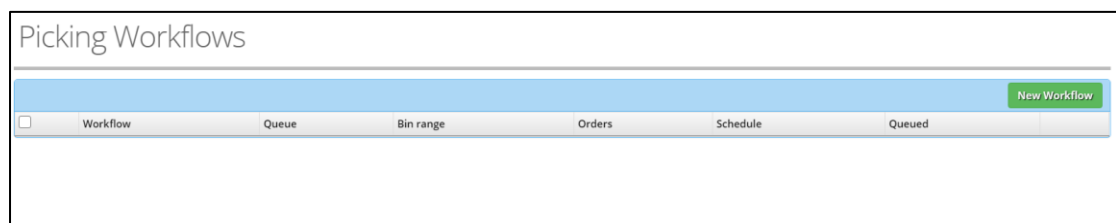
Workflows provide a way to automate the process of creating efficient Group pickings (PCK).

To fully take advantage of this functionality it is important to setup a Queue of Sales Orders to automatically create a pick list from. We covered the appropriate settings for such a Queue in “Group Pickings” and we assume from here that the Queue was saved as “Dispatch Ready” (see below).

To create a Workflow, we go to the Workflow page, accessed from the Sales Order list page

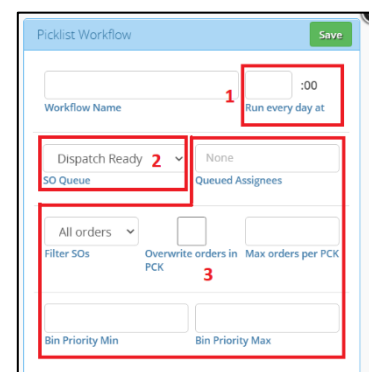


Here we can see an overview of any existing Workflows, and we have a button to create a New Workflow.



Pressing the New Workflow button, we see the Picklist Workflow options. We must give the Workflow a name.

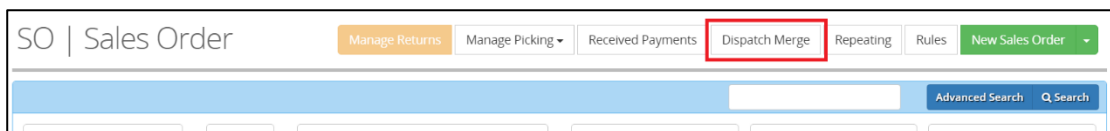
#	Field	Usage
1	Run every day at	Use 24h time to set. The Workflow will run every day at this time
2	SO Queue	Choose the SO Queue that the Workflow should work on
3	Group picking settings	These settings are fully explained in “Group Pickings”. These will be used for the Workflow



## Dispatch Merge

Often multiple Sales Orders will have the same shipping address and may become Ready to Dispatch at the same time. In this case it can be financially beneficial to send out all the lines from several SO's in the same pack.

To access the Dispatch Merge function, we click the button on the Sales Order page.

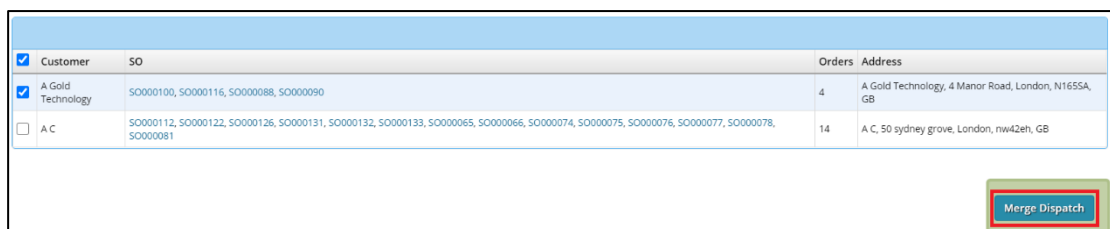


SO | Sales Order

Manage Returns Manage Picking Received Payments **Dispatch Merge** Repeating Rules New Sales Order

Advanced Search Search

On the Dispatch Merge page, we can see the eligible Orders, grouped by Customer and Shipping Address

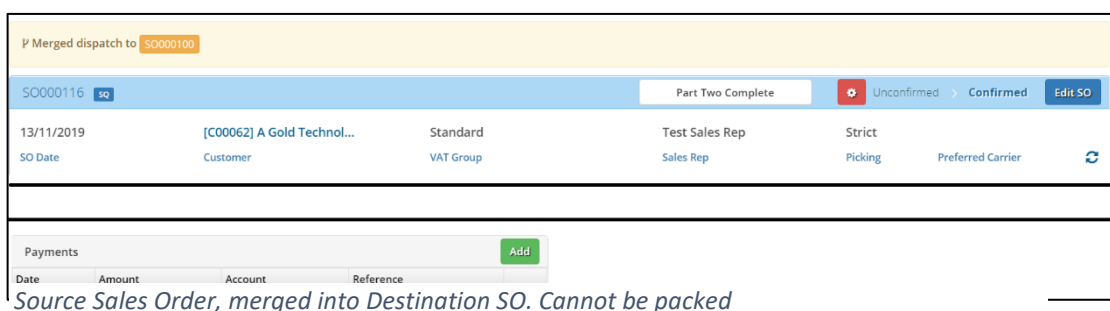


<input checked="" type="checkbox"/> Customer	SO	Orders	Address
<input checked="" type="checkbox"/> A Gold Technology	SO000100, SO000116, SO000088, SO000090	4	A Gold Technology, 4 Manor Road, London, N165SA, GB
<input type="checkbox"/> A C	SO000112, SO000122, SO000126, SO000131, SO000132, SO000133, SO000065, SO000066, SO000074, SO000075, SO000076, SO000077, SO000078, SO000081	14	A C, 50 sydney grove, London, nw42eh, GB

Merge Dispatch

To merge dispatches, we select one or more eligible groups and click the 'Merge Dispatch' button that appears.

Merging Dispatch for multiple Sales Orders, allows the destination Sales Order to pack and ship every line from the source SO's. Note that only the destination SO can pack anything; the source SO's cannot be packed



Merged dispatch to SO000100

SO000116 SO Part Two Complete Unconfirmed Confirmed Edit SO

13/11/2019 [C00062] A Gold Technol... Standard Test Sales Rep Strict  
SO Date Customer VAT Group Sales Rep Picking Preferred Carrier

Payments Add

Date Amount Account Reference

Source Sales Order, merged into Destination SO. Cannot be packed



P Merging dispatch from SO000116

P Merging dispatch from SO000088

P Merging dispatch from SO000090

SO000100

Unconfirmed

Confirmed

Edit SO

18/09/2019

[C00062] A Gold Technol...

Standard

Strict

SO Date

Customer

VAT Group

Sales Rep

Picking

Preferred Carrier

Payments

Add

Date

Amount

Account

Reference

Packing SO000100

Print Part Labels

Print Packing Slip

Print Picking List

Create Pack

Pack & Ship

Picking Notes

Delivery Instructions

Invoice and SO Notes

Destination Sales Order, with 3 Source SO's merged into it

