TRADEPEG

Picking Management

OVERVIEW

Contents

TRADEPEG

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"

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: **£11**, Shipping Address: **Paris**	Action is triggered	Action is triggered
Price: **£9**, Shipping Address: **Paris**	Action is **NOT** triggered	Action is triggered
Price: **£11**, Shipping Address: **New York**	Action is **NOT** triggered	Action is triggered
Price: **£9**, Shipping Address: **New York**	Action is **NOT** triggered	Action is **NOT** triggered

Next, we add the rule action:

#	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.

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.

> ☀️ **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.

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

TIP:

Example usage:

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 **NOT** 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 **NOT** triggered (as Document ID is not 4, and group evaluates to false (as Product Weight is more than 400g))

Queues

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.

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.

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.

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

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

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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.

Grouped Pickings

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

<div style="border:1px solid gray">

💡 **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.

Most important is the Carrier Label status, which must be Complete for this item to be considered ready to be dispatched.
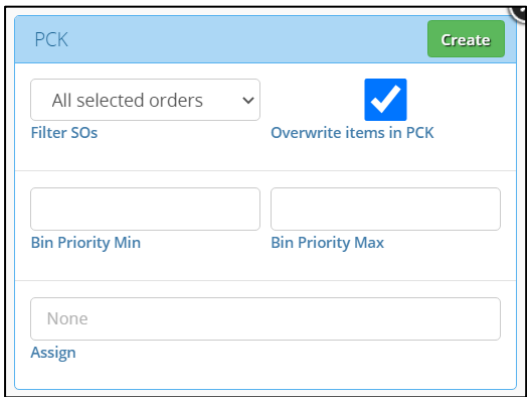
Grouped Dispatch is a good use case for using Rules to automatically define the carrier, confirm the sales order and tagging, amongst other actions. For example, a rule which appends the tag "Express" to orders with a due date within 2 days, will enable further filtering in the Dispatch Ready Queue (using 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.

</div>

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.
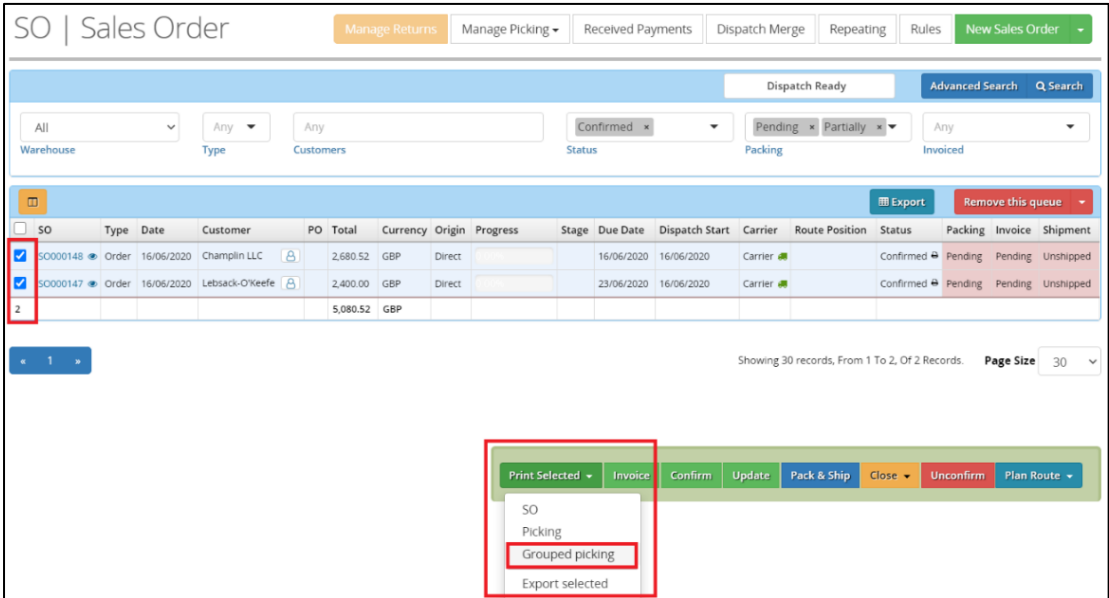
We see various options for the Group picking:

Field	Usage
Filter SO's	There are 3 options available, 'All', 'Single' or 'Multi': *Single Item* 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 *Multi Item* will create a PCK only for SO's with multiple lines, this is used to complement the Single Item strategy

Overwrite items in PCK	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

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 |
| **Bin Priority Min/Max** | 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

The Bin Priority will never break up a single Sales Order with multiple lines into multiple PCK's |
| **Assign** | 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
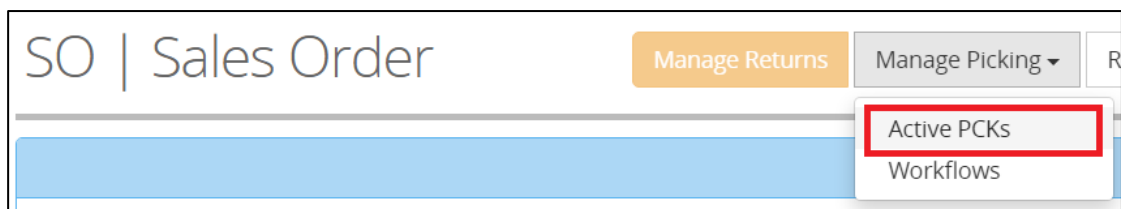
This shows any outstanding PCK's. PCK can be printed by clicking the printer in the rightmost column. Pending indicates that no warehouse agent has yet claimed the PCK from their queue+
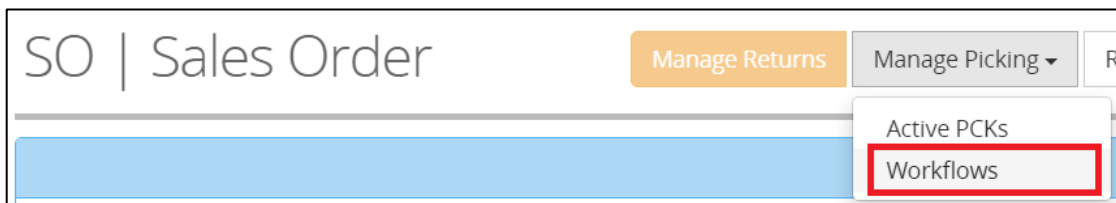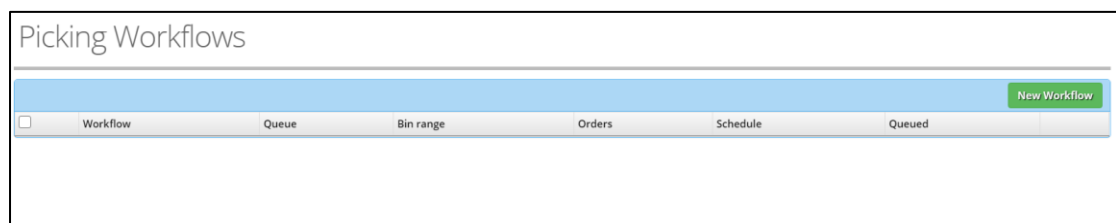
Workflows

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.

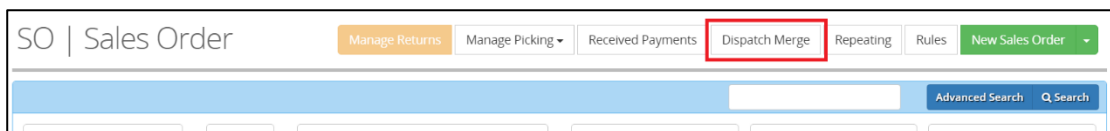Pressing the New Workflow button, we see the Picklist Workflow options. We must give the Workflow a name.

#	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	
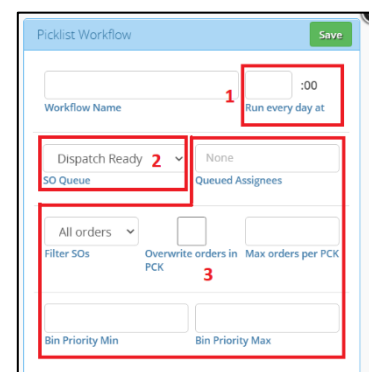
Dispatch Merge

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.
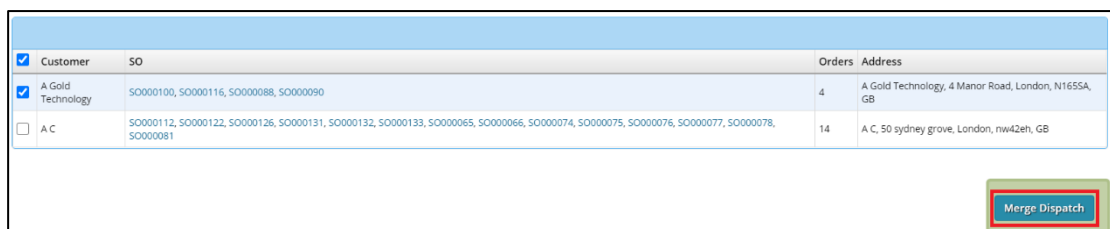

On the Dispatch Merge page, we can see the eligible Orders, grouped by Customer and Shipping Address

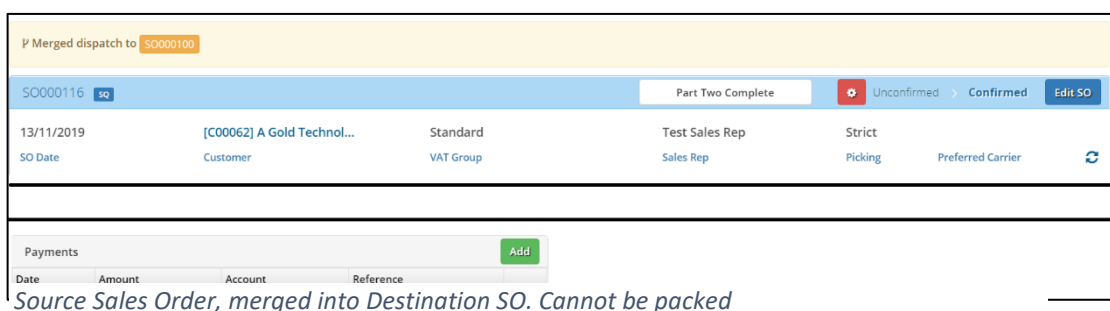To merge dispatches, we select one or more eligible groups and click the 'Merge Dispatch' button that appears.

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

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

Ᵽ Merging dispatch from SO000116

Ᵽ Merging dispatch from SO000088

Ᵽ 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 ❶ and SO Notes ✏

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