



Quick Start : Pick Pack and Production Manager

Summary

When you create a Sales Order, Production Order, Reserve Invoice, or Inventory Transfer Request, you have the ability to use the Pick Pack and Production Manager to help you create a pick list.

Step-by-step guide

- Navigate to Inventory > Pick and Pack > Pick Pack and Production Manager

Pick Pack and Production Manager - Selection Criteria

Selection Criteria Name: _____

Status: Open | Group By: None

Manage: Sales Orders | Reserve Invoices
 Production Orders | Inventory Transfer Requests

Sales Order No. | From | To

Posting Date | | |

Required Date | | |

Delivery/Due Date | | |

Customer | | |

Fulfillment % | 0.000 | 100.000

Item | | |

Warehouses

Location	Whse Code	Whse Name
<input checked="" type="checkbox"/>	→	

Expand | Collapse

Sort By: Document Number

OK | Cancel | Save

- Enter your selection criteria and click OK



- In the first drawer, you have all your open Sales Orders, select one or more (if you want to group up several orders for picking) checkboxes

Pick Pack and Production Manager

Open Released Picked

Find Document Number

#	Transact. Type	Doc. No.	Customer Code	Customer Name	Doc. Row	Delv/Due Date
1	OR	2995	C10124	Beverage Distributors Company, LLC	1	09/01/2014
2	OR	2995	C10124	Beverage Distributors Company, LLC	2	09/01/2014
3	OR	2995	C10124	Beverage Distributors Company, LLC	3	09/01/2014
4	OR	2995	C10124	Beverage Distributors Company, LLC	4	09/01/2014
5	OR	2995	C10124	Beverage Distributors Company, LLC	5	09/01/2014
6	OR	2995	C10124	Beverage Distributors Company, LLC	6	09/01/2014
7	OR	2995	C10124	Beverage Distributors Company, LLC	7	09/01/2014
8	OR	2995	C10124	Beverage Distributors Company, LLC	8	09/01/2014
9	OR	2995	C10124	Beverage Distributors Company, LLC	9	09/01/2014
10	OR	2995	C10124	Beverage Distributors Company, LLC	10	09/01/2014
11	OR	2995	C10124	Beverage Distributors Company, LLC	11	09/01/2014
12	OR	2995	C10124	Beverage Distributors Company, LLC	12	09/01/2014
13	OR	2995	C10124	Beverage Distributors Company, LLC	13	09/01/2014
14	OR	2995	C10124	Beverage Distributors Company, LLC	14	09/01/2014
15	OR	2995	C10124	Beverage Distributors Company, LLC	15	09/01/2014
16	OR	2995	C10124	Beverage Distributors Company, LLC	16	09/01/2014

OK Cancel Release to Pick List Create

- Select Release to Pick List, then switch to the Released drawer

Pick Pack and Production Manager

Open Released Picked View Detailed

#	Pick No.	Transact. Type	Doc. No.	Doc. Row	Delv/Due Date	Customer Code	C...
1	2	OR	2995	1	09/01/2014	C10124	Bever
2	2	OR	2995	2	09/01/2014	C10124	Bever
3	2	OR	2995	3	09/01/2014	C10124	Bever
4	2	OR	2995	4	09/01/2014	C10124	Bever

OK Cancel Create

- In this drawer, you can see your items released to be picked. If you drill into the pick list in the Pick No., you'll see a new Pick List with just the items for that Pick Number (this can be printed, File->Print, so you can physically pick the item)



- When finished, you can select the Pick All in the Pick List window
- In the Picked drawer, you can select the checkboxes for the item(s) you want to create a delivery and invoice document for (alternatively, you can do this from the Pick List if you want to create a delivery or invoice for that entire Pick No.)
- You can select it to either create the delivery automatically or manually (where you can make changes prior to adding it), and create the invoice afterwards

The screenshot shows the 'Pick List' window with the following fields and table:

Pick Number: 2
Pick Date: 09/15/2014
User: Conner Helton
Picker: Conner Helton
Status: Picked

#	Transact...	Doc. No.	Custom...	Delv/Due Date	Item Nu...	Item Description	UoM Code	UoM Name
1	OR	2995	C10124	09/01/2014	1105B12	India Pale Ale - C Manual		Case (24/12oz)
2	OR	2995	C10124	09/01/2014	1105C12	India Pale Ale - C Manual		Case (24/12oz)
3	OR	2995	C10124	09/01/2014	1105C12	India Pale Ale - 1 Manual		Case (24/12oz)
4	OR	2995	C10124	09/01/2014	1105Keg	India Pale Ale - 1, Manual		Ea

Buttons: OK, Cancel, Create, Pick All, Clear All

Dropdown menu options: Manual Delivery, Automatic Delivery, Manual Invoice