Ad Hoc Picking Flow

Overview

This documentation describes the Customer Collect task, the Picklist task and Route task of the Ad Hoc Picking Flow on the Mobile Client.

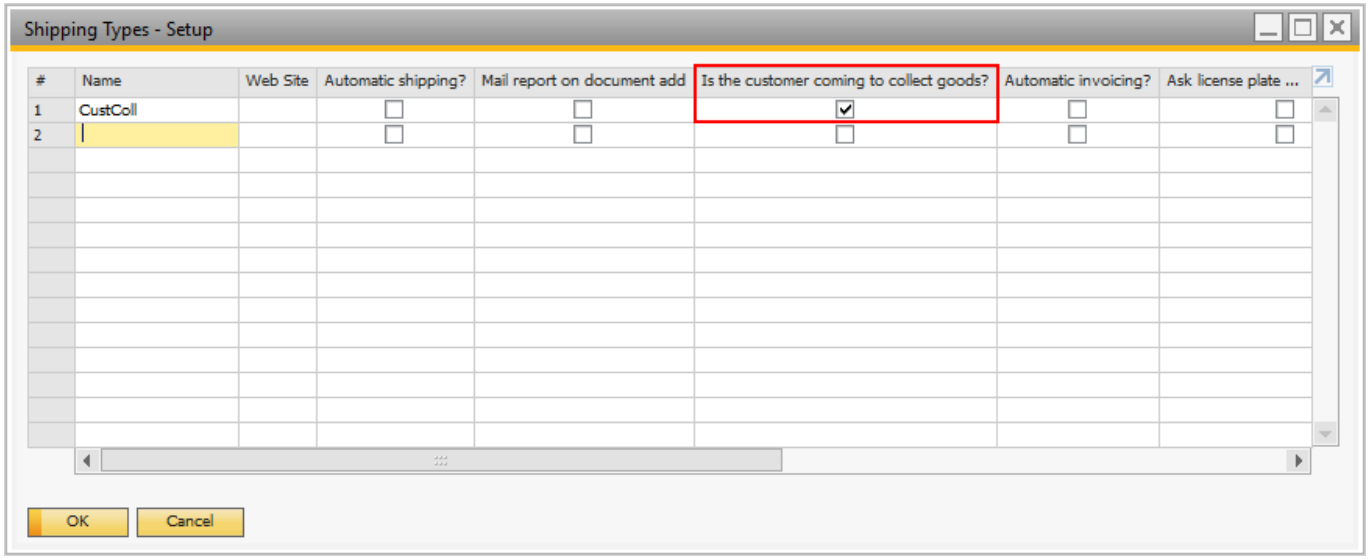
- **Customer Collect**
  - The input of the picking is a single customer collect picklist.
  - When a customer is coming to the warehouse to make a request and the picking process is performed, the customer must confirm that all the needed items are picked and loaded into the customer's vehicle.
  - During the flow a movable location can be selected.
  - During the flow no logistic carrier can be selected.
- **Picklist**
  - A picklist must be selected during the flow.
  - During the flow a movable location or a logistic carrier can be selected.
- **Route**
  - A route must be selected during the flow.
  - During the flow a movable location or a logistic carrier can be selected.

Prerequisites

1. Route task: The picklist is assigned to a route. For more information see Routes Guide.

2. Customer Collect task: The *Customer Collect?* setting is set to Yes on the Picklist screen.

Note: If the *Is customer coming to collect goods?* setting is enabled on the Shipping Types form, the system automatically sets *the Customer Collect?* setting to true on the generated Picklist Proposal and Picklist screens.



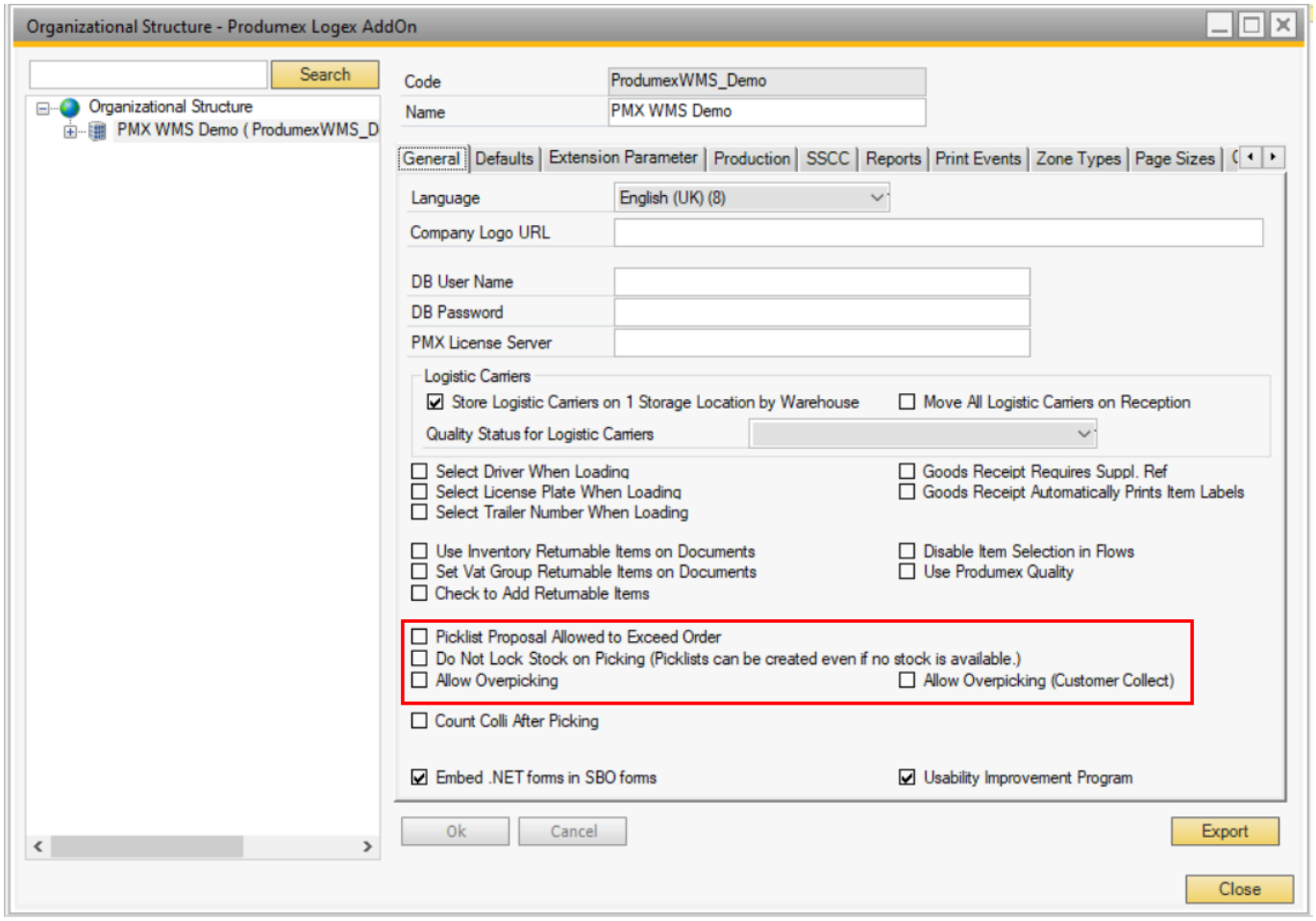
Configuration

1. Configure the Produmex Picklist Types UDT.

- Make sure that the *Use for Production* option is not enabled for the picklist type.
- Make sure that the *Use for Ad Hoc Picking* option is enabled for the picklist type.

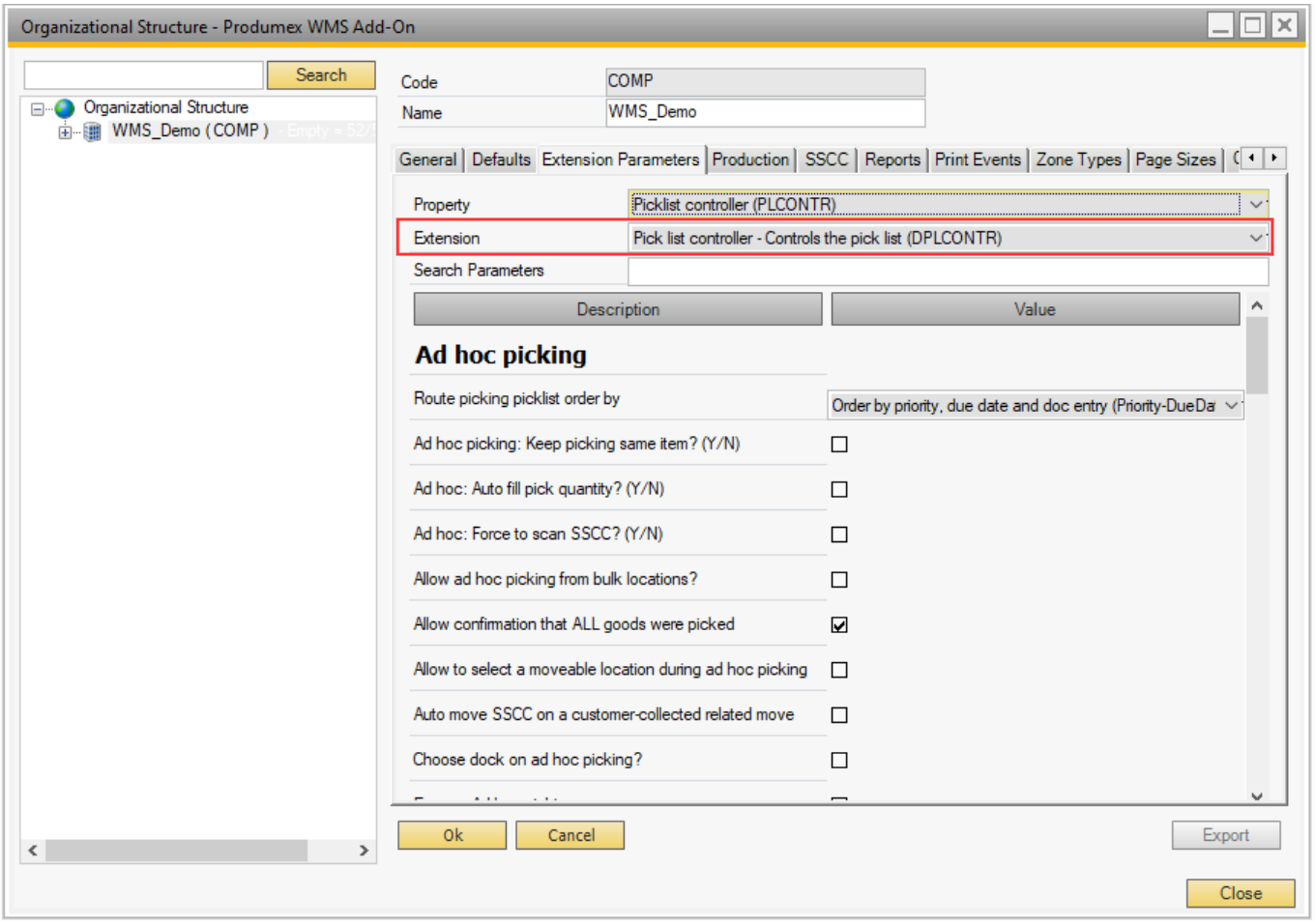
2. Configure the general settings related to the picking process on the General tab of the Organizational Structure:

- Picklist Proposal Allowed to Exceed Order
- Do Not Lock Stock on Picking
- Allow Overpicking
- Allow Overpicking (Customer Collect)



3. Configure the Ad Hoc Picking settings of the picklist controller.

4. Configure the General settings of the picklist controller.



Workflow

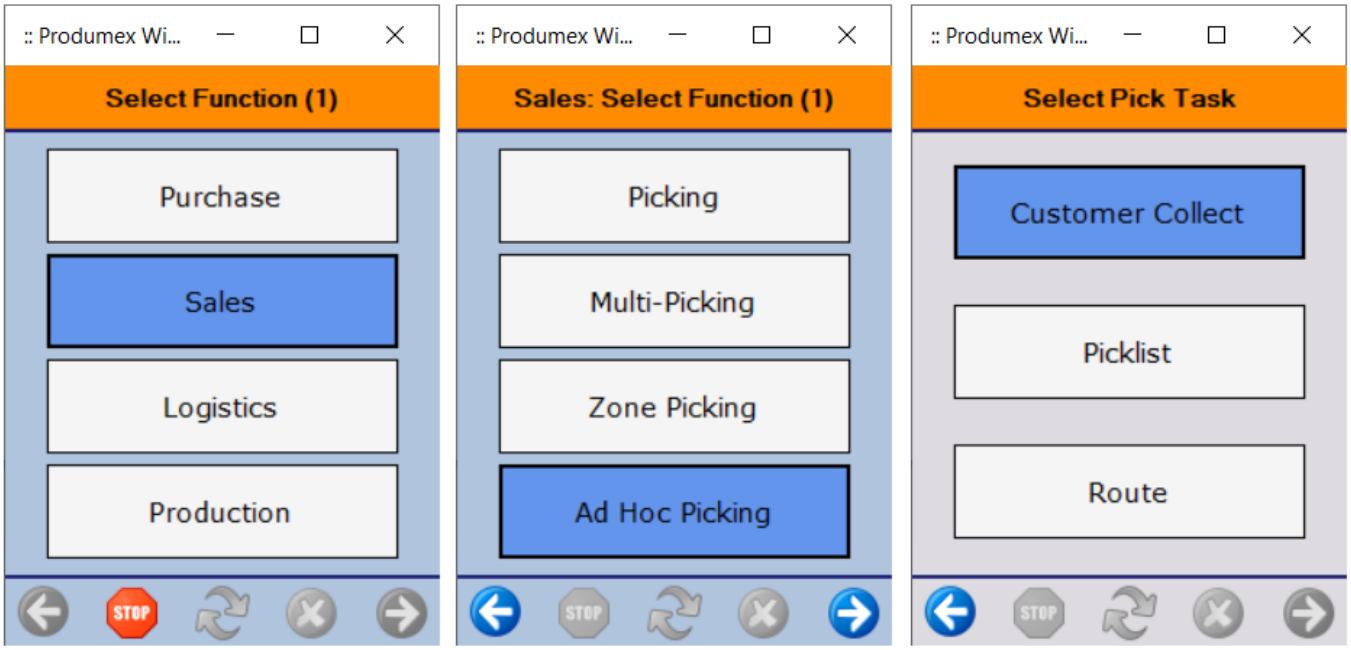
- Picklist proposal
- Picklist
- Ad Hoc Picking Flow
- Select a task
- Select a route
- Select a picklist
- Select a task
- Identify a movable location
- Select a logistic carrier
- Select a product
- Scan / Select a location
- Express Ad Hoc Picking
- Select a pick location
- Scan a source SSCC or a pick location
- Enter quantity to pick
- Select a product to confirm
- Product confirmation
- Confirm all
- Packing
- Packing

- Packing
- Packing

Ad Hoc Picking Flow steps

1. Start the flow and select a task

On the Mobile Client select Sales > Ad Hoc Picking and select a task: Customer Collect, Picklist or Route.



Next step:

- If you are performing a Route task, continue with step 2. Select a route.
- If you are performing a Customer Collect or a Picklist task, continue with step 3. Select a picklist.

2. Select a route

Scan or select a route from the list. Every open route that contains at least one picklist is listed.

Displayed information: route date, route number and route description (Template code)

Continue with step 3. Select a picklist.

3. Select a picklist

Scan or select a picklist from the list. Picklists belonging to a wave that is started are indicated with red color.

The following information is displayed:

- Shipping ID
- Picklist number
- Customer code, description and barcode
- Due date
- User(s)

Continue with step 4. Pick and pack remarks.

4. Pick and pack remarks

If a pick and pack remark is added to the picklist, the remark is shown after selecting the picklist. Tap OK to acknowledge the remark.

Next step:

- If you are performing a Customer Collect task, continue with step 5. Customer Collect Picklist: Select a task.
- If you are performing a Picklist task or a Route task, continue with step 6. Identify a moveable location.

5. Customer Collect: Select a task

On the Select a task screen you have the following options:

- Tap the `Pick items` button to start picking the items.
- If you have already performed a picking process, tap the `Confirm goods` button to confirm one by one that the products are loaded or tap the `Confirm all picked goods` button to confirm in one step that the products are loaded.

Note: The `Confirm all picked goods` button is displayed on the screen if the *Allow confirmation that all goods were picked* setting is enabled on the picklist controller and the picklist does not contain any item managed by Produmex serial numbers.

Next step:

- If you have tapped the `Pick items` button, continue with step 6. Identify a moveable location.
- If you have tapped the `Confirm goods` button, continue with step 17. Select a product to

confirm.
- If you have tapped the `Confirm all picked goods` button, continue with step 19. Confirm all picked goods.

6. Identify a moveable location

If the *Allow to select a moveable location during ad hoc picking* setting is enabled on the picklist controller, the Identify moveable location screen is displayed.

Note: If the *Auto selection of moveable location during picking?* setting is enabled on the picklist controller, the moveable location is automatically selected and the Identify moveable location screen is not displayed. In this case continue with step 10. Select a product.

On the Identify moveable location screen you have the following options:

- Scan a moveable location or tap the `Select moveable location` button and select a moveable location from the displayed list. Continue with step 10. Select a product.
- If you do not need to use any moveable location, tap the `No moveable location` button and continue with step 7. Select a logistic carrier.

7. Select a logistic carrier

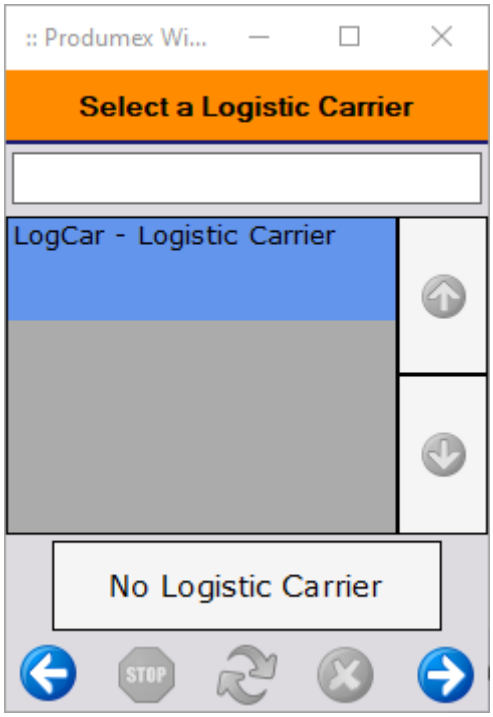
The Select a Logistic Carrier screen is displayed during the Picklist and the Route tasks in the following cases:

- no movable location has been selected
- you have at least one item that is a logistic carrier
- you have a logistic carrier location as a pick location
- the item has stock in the logistic carrier location

Note: The screen is not displayed during the Customer Collect task.

Select a logistic carrier or if you do not need to use any logistic carrier, tap the `No logistic carrier` button.

Continue with step 8. Select a customer logistic unit.

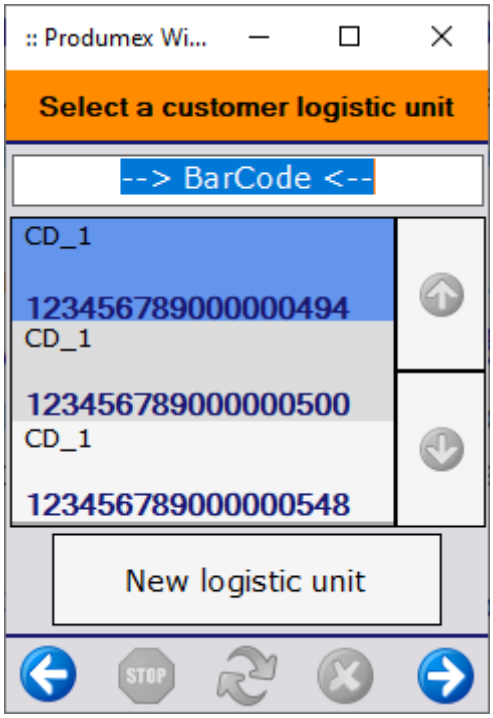


8. Select a customer logistic unit

When there is a picked logistic unit with an open picklist for the same customer and ship to address, the system displays the *Select a customer logistic unit* screen. You have the following options:

- If you want to perform the picking onto an existing logistic unit, scan the SSCC of the logistic unit.
- If you want to perform the picking onto a new logistic unit, tap the `New logistic unit` button.

Note: By default, only the open logistic units on the same loading dock and for the same customer are listed. When the *Allow multiple customers on SSCC?* option is enabled on the picklist controller, logistic units for other customers are also listed.

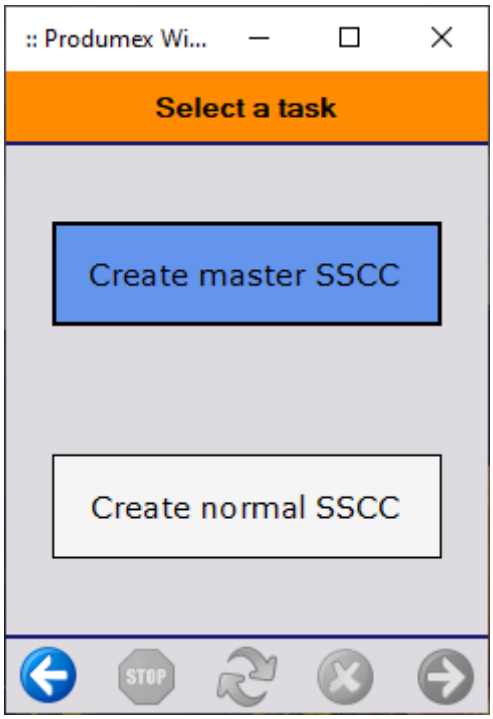


Continue with step 9. Create a master or a normal SSCC.

9. Create a master or a normal SSCC

When the *Allow to create master SSCC* option is enabled on the picklist controller, the system displays the Select a task screen. You have the following options:

- Tap the `Create master` SSCC button to pick onto a master SSCC.
- Tap the `Create normal` SSCC button to pick onto a normal SSCC.



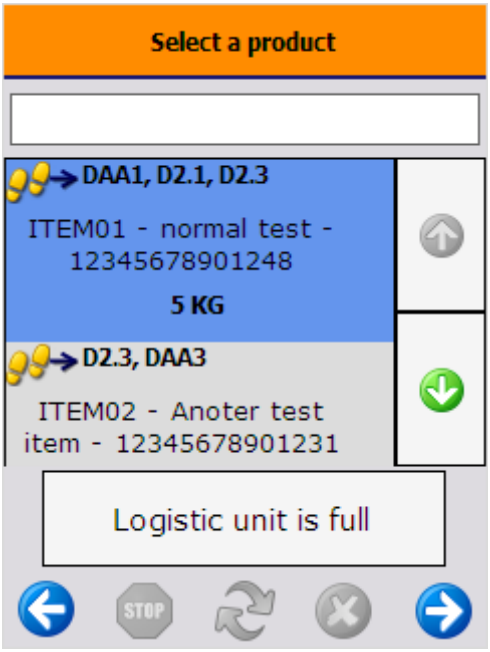
Continue with step 10. Select a product.

10. Select a product

On the Select a product screen each item with open quantity to pick is listed from the picklist.

The following information is displayed:

- Possible pick locations
- Item code, description and barcode
- Quantity to pick



You have the following options:

- Scan or select a product (see section 9.1)
- Scan the GTIN (AI 02) of the product (see section 9.2)
- Tap the `Logistic unit is full` button (see section 9.3)

10.1. Scan or select a product

Scan or select a product from the list and continue with section 10. Select a loading dock.

10.2. Scan the GTIN (AI 02) of the product

Scan a valid GTIN (AI 02) code and continue with step 14. Enter the quantity.

Note: If an invalid code is scanned, the system displays the *The product is not correct* error message. If you tap OK, the system displays the Select a product screen again and a valid code must be entered to proceed with the flow.

10.3. Logistic unit is full

If the picking is performed on an already existing logistic unit, the `Logistic Unit is full` button is displayed.

- If the selected logistic unit is full, tap the button and then tap `Yes` to confirm. Now the logistic label is printed, the system displays Select a product screen again and you can continue the picking process on another logistic unit.
- If you tap `No`, the picking continues on the same logistic unit and the Select a product screen is displayed.

11. Select a loading dock

When the *Choose dock on ad hoc picking* setting is enabled on the picklist controller, the system displays the *Select a location* screen and a loading dock must be selected.

Note: The setting applies to Picklist and Route tasks.

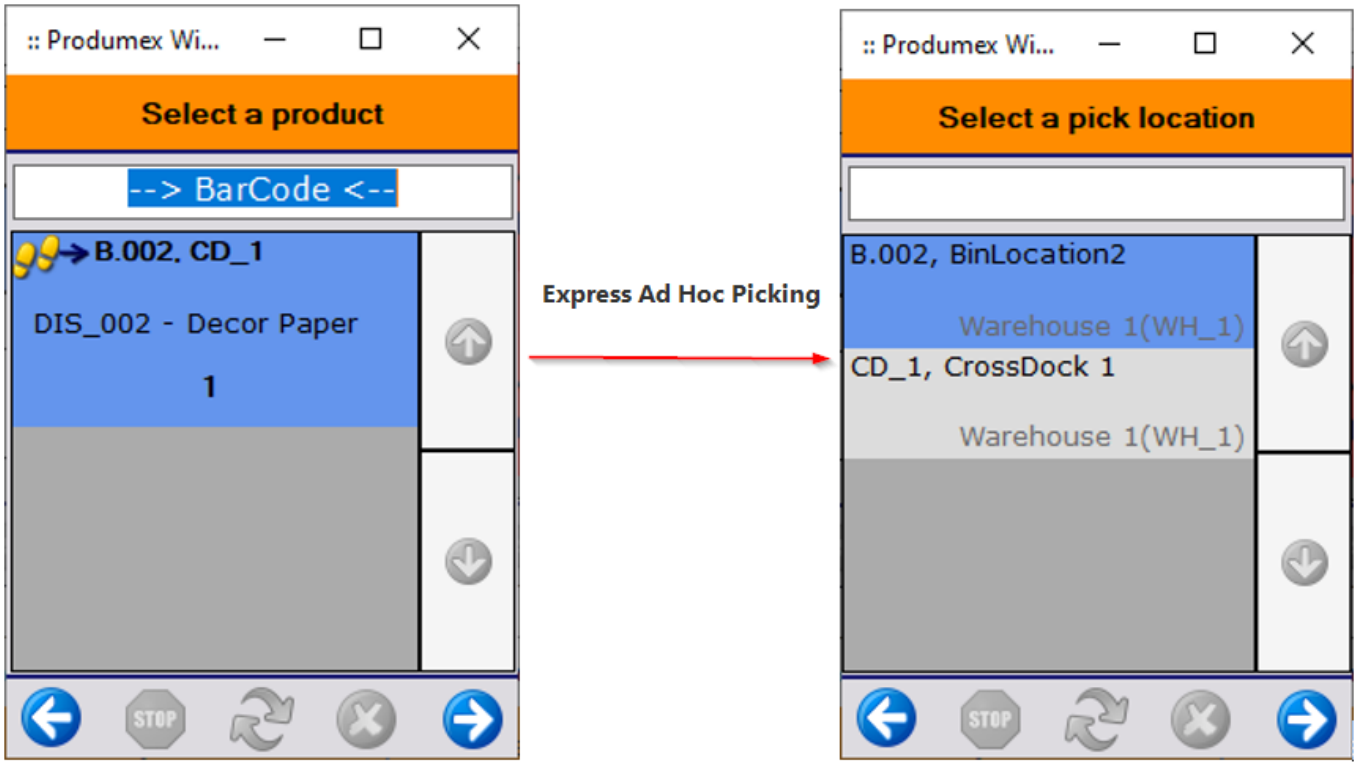
Continue with section 11. Express Ad Hoc Picking.

12. Express Ad Hoc Picking

If the *Express Ad Hoc Picking* setting is enabled on the picklist controller, the Scan SSCC or Location screen is skipped after selecting or scanning a product on the Select a product screen. You have the following options:

- If the item is available on one single location, the system immediately displays the Enter the quantity screen.

- If the item is available on more than one location, the system displays the Select a location screen. You can scan the location or select it from the list and then the system displays the Enter the quantity screen.



Continue with step 14. Enter the quantity.

13. Scan SSCC or location

On the *Scan SSCC or Location* screen the following information is displayed:

- Possible pick locations
- Item code, description and barcode
- Quantity to pick

You have the following options:

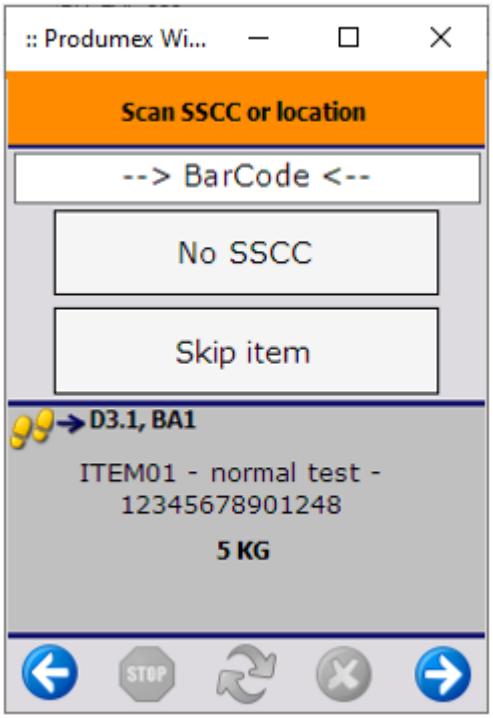
- Scan the source SSCC (see section 12.1)
- Scan a pick location (see section 12.2)
- Select a pick location (see section 12.3)
- Select another moveable location (see section 12.4)
- Skip the item (see section 12.5)

13.1. Scan the source SSCC

Scan the source SSCC and continue with step14. Enter the quantity.

13.2. Scan a pick location

If the product has no SSCC, scan a pick location and the Scan a product screen is displayed. Scan the product or tap the `Select a product` button and select the necessary product from the list.



Continue with step 14. Enter the quantity.

13.3. Select a pick location

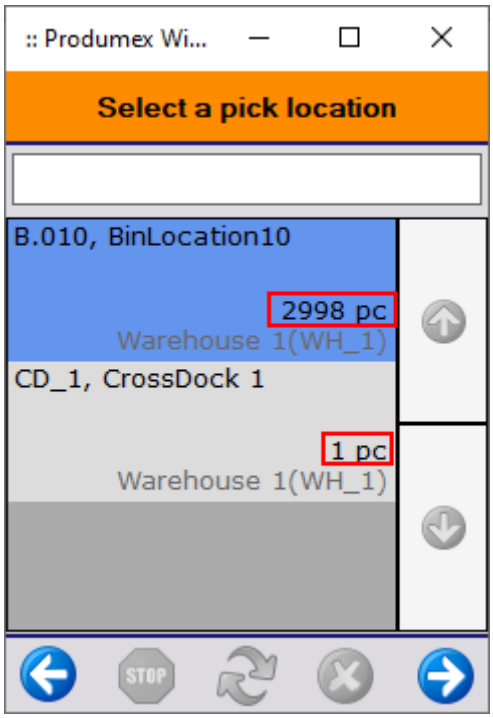
If the product to pick has no SSCC, it is also possible to select the necessary location from a list as follows.

1. Tap `No SSCC` and the system displays the *Scan a Location* screen.
2. Tap `Select Location`.
3. Select a pick location from the displayed list. All locations in the warehouse with available stock of the item are listed.
4. The Scan a product screen is displayed. Scan the product or tap the `Select a product` button and select the necessary product from the list.

Note:

- The `No SSCC` button is not displayed if the *Ad Hoc: Force to Scan SSCC* setting is enabled on picklist controller.
- If the *Allow ad hoc picking from bulk locations* setting is enabled on the picklist controller, the system displays bulk locations (non-pick locations) as well.
- The *Reason requirements when skipping first location* setting on the picklist controller defines if a reason is required when selecting a location that is different from the first suggested one.

- If the *Show Stock for Location* setting is enabled on the picklist controller, the Select a pick location screen shows the free stock quantity of the selected item for each location listed on the screen.



Continue with step 14. Enter the quantity.

13.4. Other tasks

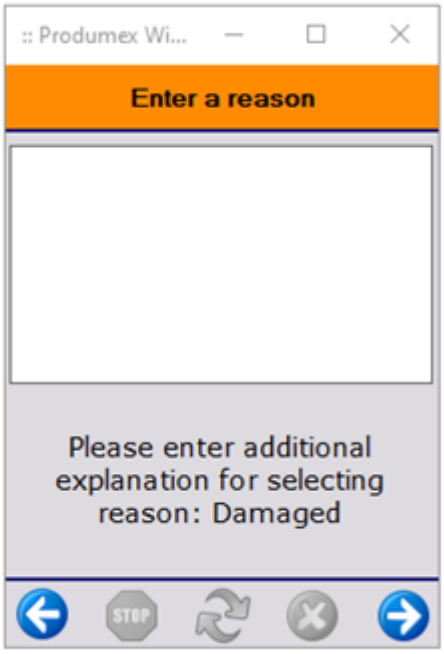
If you are using a moveable location, the `Other tasks` button is displayed on the Scan SSCC or location screen and if you tap the button, you have the following options:

- If you tap the `Other mov. loc.` button, the system displays the Identify moveable location screen. You can replace the previously selected movable location with another moveable location and then the system goes back to the Select a product screen.
- If the item must be skipped, tap the `Skip item` button (see section 12.5).

13.5. Skip the item

If the item must be skipped, tap the `Skip Item` button and on the next screen, select a reason for not picking the full stock (at least 10 characters).

- If there is no more item in the picklist, the system displays the *All items are picked* screen. Tap OK and the system goes back to the Select a picklist screen.
- If there is another item in the picklist, the system goes back to the Select a product screen.



14. Enter the quantity

Add the quantity to pick and tap the right arrow.

Note:

- By default, the quantity displayed in the quantity input field is 1. If the *Ad hoc: Auto fill quantity* setting is enabled on the picklist controller, the quantity to pick is displayed in the quantity input field of the screen.
- If there is not enough free stock, the following message is displayed: *There is not enough free stock. Please enter a new quantity*. Tap OK and the system displays the Enter the quantity screen again.

Next step:

- Customer Collect task:
  - If there is another item to pick, continue with step 15. Customer Collect: Select a task.
  - If there is no item to pick, continue with step 16. All items are picked.
- Picklist task or Route task:
  - If there is another item to pick, continue with step 10. Select a product.
  - If there is no item to pick, continue with step with step 16. All items are picked.

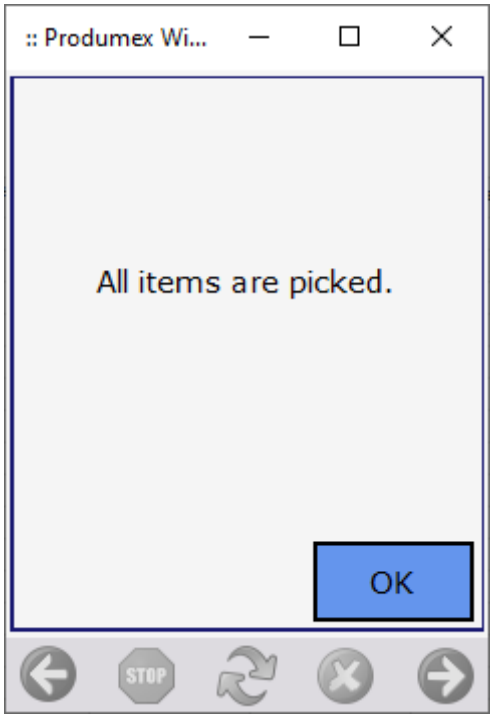
15. Customer Collect: Select a task

If there is another item to pick, you have the following options on the Select a task screen:

- Tap the **Go to customer** button to go back to the Select a picklist screen.
- Tap the **Pick more items** button to go back to the Select a product screen and continue the picking.

16. All items are picked

The system displays the message *All items are picked*. Tap OK.



Note:

- If the *Ad hoc picking: Keep picking the same item* setting is enabled on the picklist controller, the next product to pick can only be selected if the maximum pick quantity of the previously selected product is picked.
- If the full quantity of the selected item is picked and the *204 - Picking: after item is picked* print event is set for the picklist type (on the Print Events tab of the Organizational Structure), the system asks if you want to print a label. To proceed with the printing tap OK.

Next step:

- Customer Collect task:
  - If the picking process is performed on a movable location, the picklist status is picked. You can start the flow again and confirm the goods (see step 5. Customer Collect: Select a task) or start the packing process with the Packing flow, the Item Packing flow or the Mobile Packing flow.
  - If no movable location is used during the picking process, you start the flow again and confirm the goods (see step 5. Customer Collect: Select a task).
- Picklist and Route tasks:
  - If the picking process is performed on a movable location, the picklist status is picked and you can start the packing process with the Packing flow, the Item Packing flow or the Mobile Packing flow.
  - If no movable location is used during the picking process, the status of the picklist is defined by the *Always status picked?* setting of the Produmex Picklist Types UDT

(PMX_PLTY).

- If the setting is enabled, the status of the picklist is picked at the end of the flow and you can proceed with the Consolidated Packing flow.
- If the setting is disabled, the status of the picklist is packed at the end of the flow and you can proceed with the Shipping flow.

17. Customer Collect: Select a product to confirm

On the Select a product to confirm screen every picked item from the picklist is displayed.

Displayed information:

- Code of the loading dock
- Item code, description and barcode
- Quantity to load

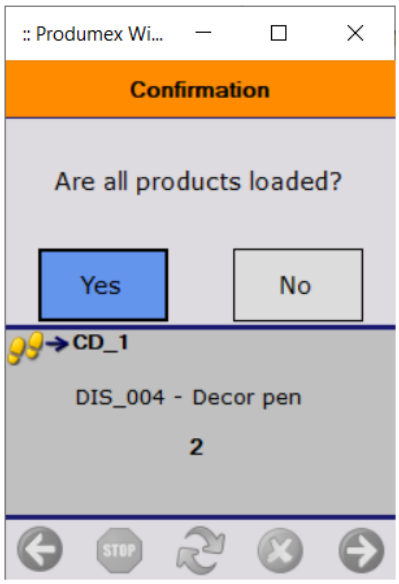
Scan or select a product from the list to pack and tap the right arrow button. Continue with step 18. Customer Collect: Product confirmation.

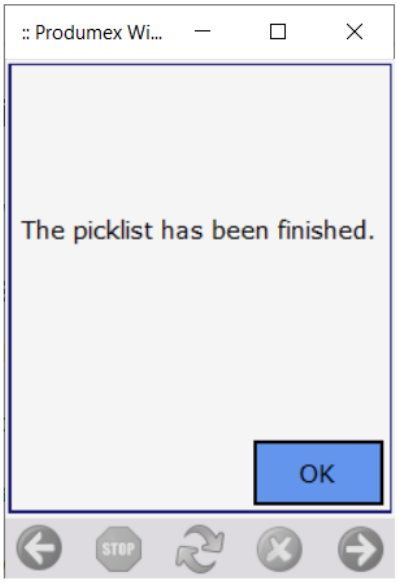
Note: If you want to stop the loading, tap the `Stop confirmation` button and the system goes back to the Select a task screen.

18. Customer Collect: Product confirmation

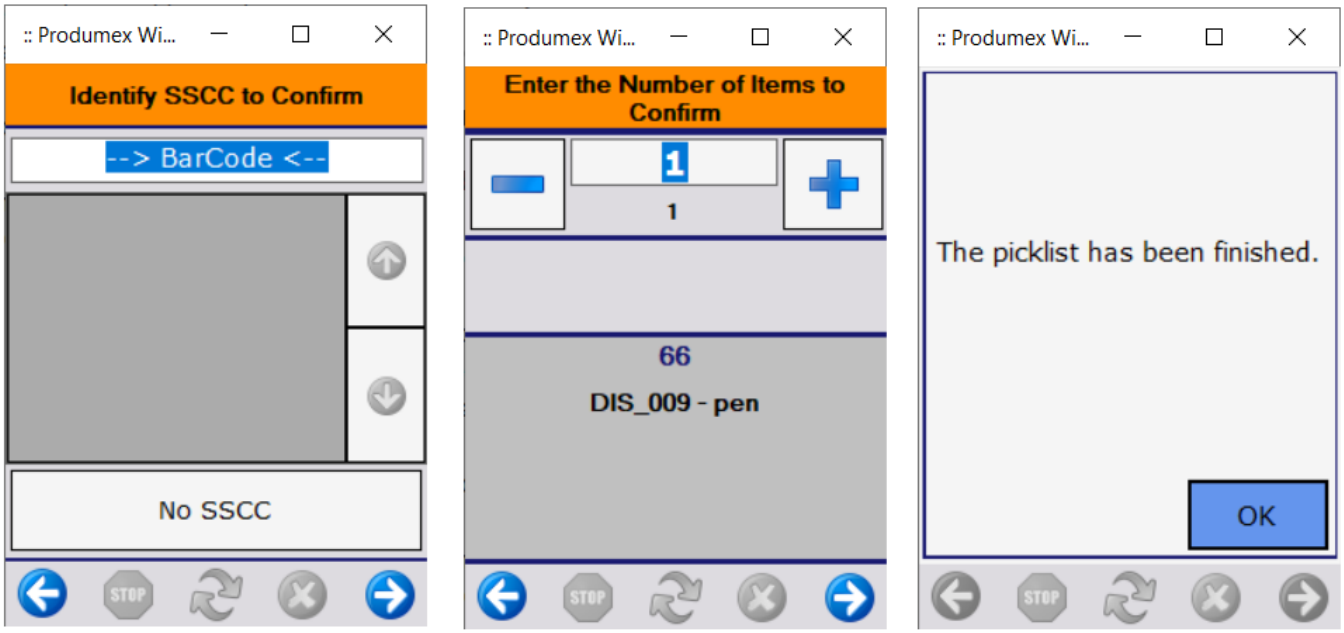
On the confirmation screens tap `Yes` to confirm that all products are loaded. The system displays the message *The picklist has been finished.* Tap OK.

The status of the picklist is closed and the system generates the Sales Delivery document.





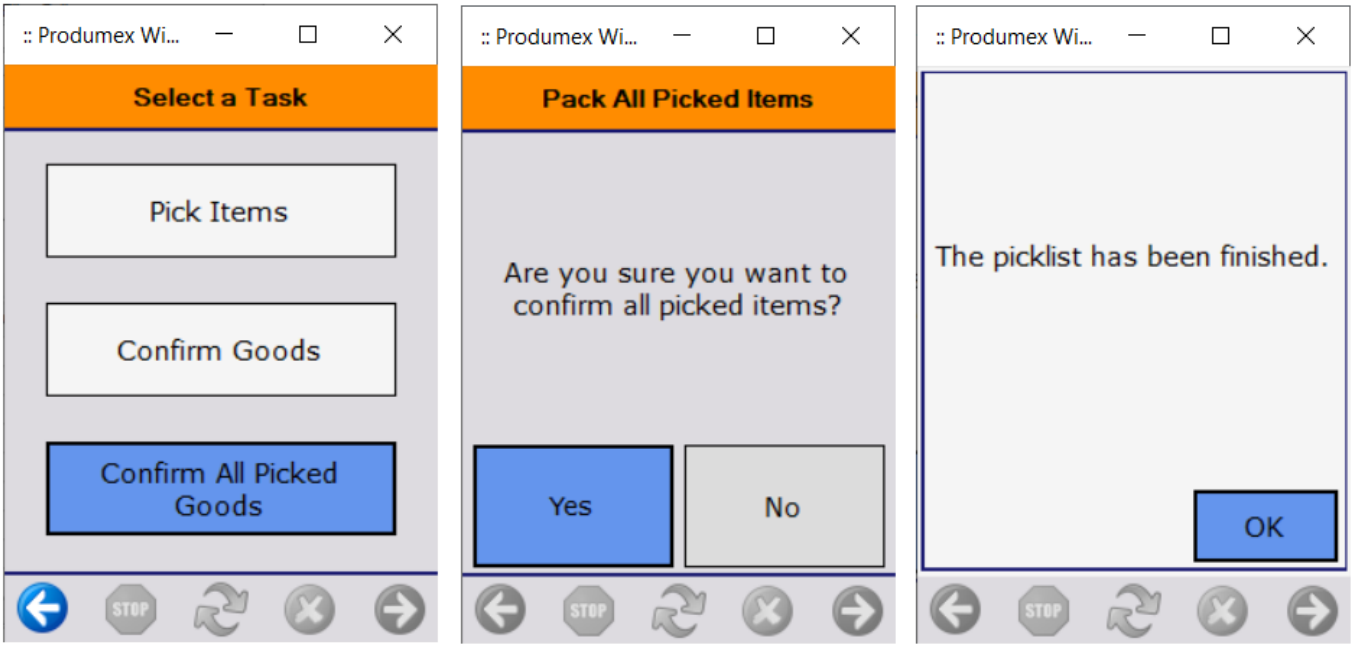
If you Tap No on the first confirmation screen, the system asks you to check the SSCC and the quantity during the confirmation. Scan or select the SSCC and add the item quantity.



19. Customer Collect: Confirm all picked goods

Tap the Yes button to confirm in one step that all picked items are loaded. The system closes the picklist and creates the Sales Delivery document.

If you tap the No button, the system goes back to the Select a task screen without confirming the loading.



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