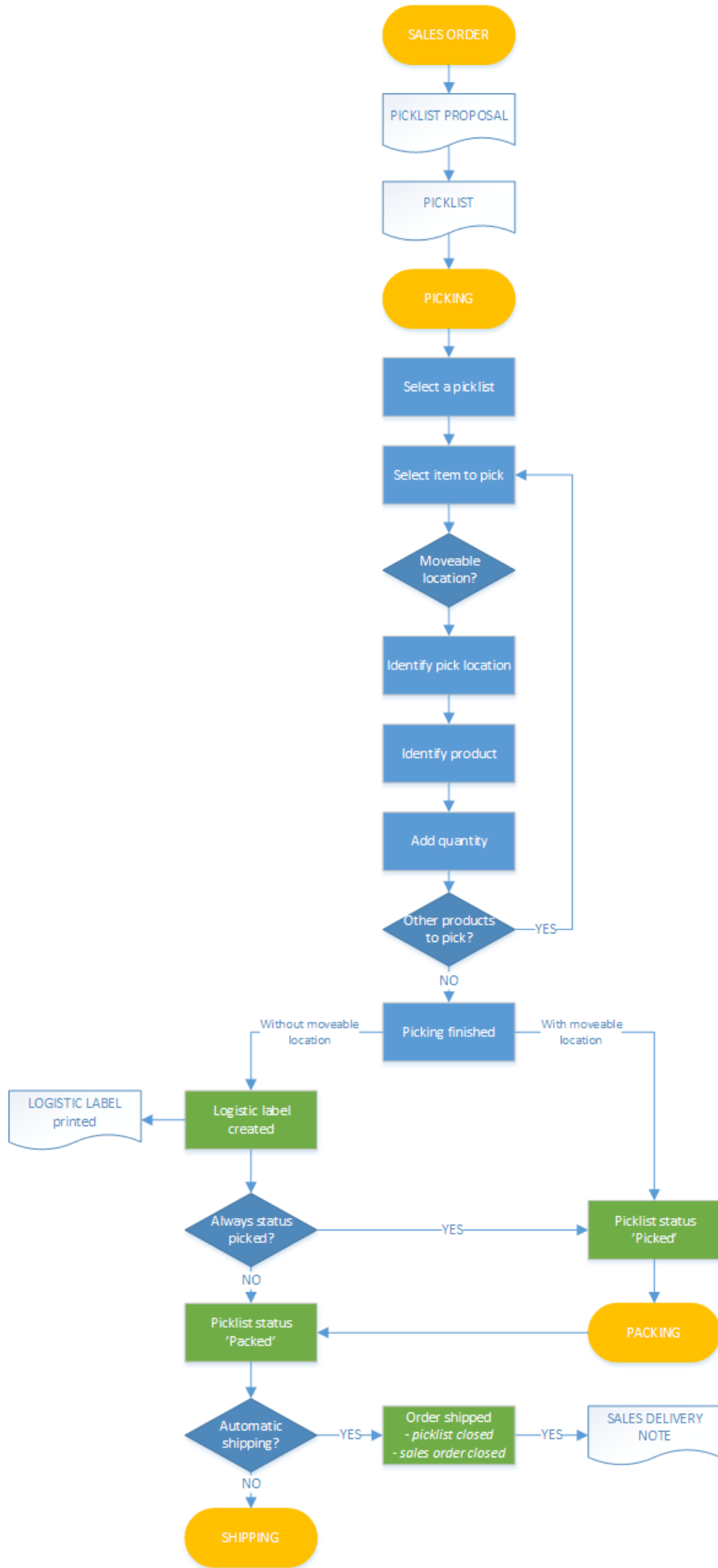


# Picking Flow

## Workflow



# Picking Flow steps

## 1. Initiate the flow

To initiate the picking, press the **Picking** button. The button can be reached via the path: Sales > Picking.

## 2. Select a wave

Select a wave from the list.

When there is no custom wave description added on the [pick list controller](#), the following information is displayed for waves:

- Wave number
- Customer card code and name
- Shipping address

If the wave contains pick lists for multiple customers, then the following information is displayed by default:

- [number of the pick list proposal] pick list number

The sorting of the pick lists is based on the 'Wave order by' setting on the [pick list controller](#).

Pick lists will be listed if the following verifies:

- The status is 'Not Ready', 'Ready', 'Partially Ready' or 'Partially Picked'
- The pick list is not customer collect
- The 'Use for Production?' option is not enabled for the [pick list type](#)
- Stock locking for pick lists is not disabled on the [General Settings](#) tab of the OSE
- The 'Use for picking' option is checked for the [pick list type](#)

In case you have defined the name of your customized view on the [Picklist controller](#) (see section *Picking/Multi-picking*), the pick lists will be filtered on the basis of your view settings and those waves will be listed which meet the criteria defined in your view settings.

After the wave has been selected, all pick lists in the wave with the status 'Not Ready' or 'Partially Ready' will be converted to 'Ready' status. If the *Picking: Make pick list ready for selected line? (Y/N)* option is enabled on the [pick list controller](#), then the system does not change the pick list status until a pick list line is selected. For more information about pick list statuses and inventory locks please see: [Stock allocation algorithm](#)

When the 'Auto select the wave?' option is set to true on the [pick list controller](#), the system will automatically select the wave and only that wave will be shown on the screen.

When a wave is started, it will be locked for the user.



## Picklist Status Update

This description explains how the status of a picklist is updated and identifies the settings that can change the status.

### Related sites:

- [Stock allocation algorithm](#)
- [Picking Flow](#)
- [Picklist](#)

### Many settings affect how the pick list status is updated:

#### Only pick items on location on same or lower level as dock? (Y/N)

With default status picklists are created with **“Not Ready”** status.

If the **Only pick items on location on same or lower level as dock? (Y/N)** setting is enabled, then the status of the picklist is automatically set to **“Ready”** upon creation, this also means that the locking level will be LUID.

#### Auto select the wave? (Y/N)

If the **Auto select the wave? (Y/N)** setting is enabled on the [Picklist controller](#), then the picklists belonging to the wave selected by the system are automatically set to **“Ready”** when the wave is shown on the Select the picklist screen.

If this setting is disabled, the pick lists in the wave are only set to **“Ready”** after the user selects the wave on the **Select the Picklist** screen and proceeds with it.

#### Do not lock stock on picking (picklists can be created even if no stock is available)

Enable the **Do not lock stock on picking (picklists can be created even if no stock is available)** setting at the [General Settings Tab](#).

#### When this setting is enabled:

- The system does not reserve stock when creating a proposal.
- It bypasses the check for available stock quantity.
- As a result, proposals can be made regardless of current stock levels.

#### Make picklist ready before print? (Y/N)

In SBO, the picklist can be set to **“Ready”** during printing if the **Make picklist ready before print? (Y/N)** setting is enabled in the [Picklist controller](#).

## Make picklist ready for selected line? (Y/N)

When **Make picklist ready for selected line? (Y/N)** is enabled, the status of the pick list lines stays as **“Not Ready”**. This means the system will not allocate stock to these lines until the user selects the item using a scanner.

### 3. Remarks

If *Pick and Pack remarks* were added to the pick lists belonging to the selected wave, the remarks will be shown after the wave selection. Press the **Ok** button to acknowledge the remark.



### 4. Select item to pick

Select the item to pick. Items from the pick list with open quantity are listed on the screen. The items to pick are sorted based on the *'Pick items order by'* setting on the [pick list controller](#).  
Displayed information:

- Source location
- Quantity to pick
- Item code - description - barcode
- SSCC number
- Batch number
- Best Before Date

If the *'Allow to select the item to pick?'* setting is not enabled on the [pick list controller](#), the system will automatically start the picking with the first item on the list.

**Note:** The **“Items Still to Pick”** screen appears at the start of Picking, regardless of **“Allow to select the item to pick”** setting. The difference is the system ignores the user's selected item line and proceeds with the first item on the list. After the first item is picked, the screen is skipped, and WMS automatically moves to the next item.

If the *'Picking: Make pick list ready for selected line? (Y/N)'* option is enabled on the [pick list controller](#), the status of the line is only set to 'Ready' and the system only allocates stock for the line after the item on the line is selected on the scanner. The status of the other pick list lines is not changed until the user selects the item on the pick list line.

Note: Picklists use item description based on Item Master Data. If the item description is changed on sales orders, the change is not reflected on the Mobile Client, but on the delivery notes.



## 5. Identify moveable location

To pick onto a moveable location, scan it or select it from a list after pressing the **Select moveable location** button. For more information please see: [4.2. With moveable location](#)

To pick without a moveable location, press the **No moveable location** button. For more information please see: [4.3. Without moveable location](#)

To pick onto an existing logistic unit, press the **Enter SSCC** button. For more information please see: [4.4. Picking onto an existing logistic unit](#)

If the wave is for multiple customers, the user is forced to pick onto a moveable location. The **No moveable location** and the **Enter SSCC** button is not shown on the screen.



### 5.1. No moveable location defined for the warehouse

If there is no moveable location defined in the warehouse, the system displays this screen instead.

To scan an existing SSCC, press the **Enter SSCC** button.

To create a new SSCC, press the **New SSCC** button.



### 5.2. With moveable location

Scan the moveable location or select it from a list after pressing the **Select moveable location** button.

The moveable location will be automatically selected if the *'Auto selection of moveable location during picking?'* option is set to true on the [pick list controller](#).

Picking onto a moveable location allows the operator to pick multiple orders and pack them onto a logistic carrier at another location (packing station). After the picking has been completed, the status of the pick list will be converted to 'Picked'. The stock will be ready for shipping after it went through the [packing process](#).

### 5.3. Without a moveable location

Press the **No moveable location** button to proceed without a moveable location.

When no moveable location is used during the picking, the status of the pick list will be converted to 'Packed' automatically after the picking was completed, except when the option *'Always status picked?'* is set to true for the [pick list type](#).

#### 5.3.1. Select an existing logistic unit

When there is a picked logistic unit with an open pick list for the same customer and ship to address,

the system will ask whether to continue the picking onto an existing logistic unit or start a new one.

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 set to true on the [pick list controller](#), logistic units for other customers are listed too.

Scan the SSCC of an existing logistic unit or press the **New logistic unit** button to pick onto a new logistic unit.

If the *'Only pick on 1 SSCC?'* option is enabled on the [pick list controller](#) and there are already items picked for the given pick list, then the system automatically selects the last logistic unit started for the pick list and skips the screen.



### 5.3.2. Select a logistic carrier

When starting a new logistic unit for the picking, the system will ask whether to pick onto a logistic carrier or not.

Scan the logistic carrier or select it from the list. To proceed without a logistic carrier press the **No logistic carrier** button.

If there is no free stock of logistic carriers the system will automatically skip this screen.



### 5.4. Picking onto an existing logistic unit

When the *'Allow to identify the SSCC to pick on?'* option is set to true on the [pick list controller](#), an additional *'Enter SSCC'* button is displayed on the screen. Press this button to identify the SSCC to pick on. On the next screen scan the SSCC.



## 6. Identify pick location/source SSCC

On the next screen identify the pick location or the source SSCC.

### 6.1. Identify pick location

Scan the location code or select the location from a list after pressing the **Select location** button. Only the proposed location can be selected.

Press the **Other tasks** button to select another moveable location, to select alternate stock, to skip the item or to start a new logistic unit.

When the *'Skip screen to identify the pick location? (Y/N)'* option is set to true on the [pick list](#)

[controller](#), the system will automatically proceed with the allocated pick location and goes to the Scan a product screen. Please see: [6. Identify product](#)



## 6.2. Scan an SSCC

The system will ask the user to scan the SSCC in the following scenarios:

1. The 'Force the user to pick full pallet?' option is set to true on the [pick list controller](#) and the stock that needs to be picked is on a full pallet.
2. The 'Item picking: Force user to scan SSCC when stock is on SSCC?' option is set to true on the [pick list controller](#).

On the lower part of the screen the details of the product to pick is displayed:

- Location code
- Quantity to pick (uom)
- Item code, description and barcode
- Batch number
- Best Before Date
- SSCC number/Total quantity to pick

Only the proposed SSCC can be scanned otherwise the system will show an error message.



## 6.3. Other tasks

Press the **Other mov .loc.** button to continue the picking onto another moveable location.

When there is insufficient stock from the proposed item, batch or best before date, press the **Alternate stock** button. The system will show the alternatives the operator can pick.

If the *Force first available batch on selecting alternate item? (Y/N)* is set to true on the [Picklist controller](#)(section *All, except Ad hoc picking*), you can select an item only from the batch with the earliest expiry date that meets the shelf-life requirements.

When the total number of the item cannot be picked, press the **Skip item** button.



If not picking onto a moveable location, instead of the **Other mov. loc.** button a **Logistic unit is full** button is displayed. The button is only visible if there already are items picked on to the logistic unit. Press this button to finish the logistic unit and continue the picking onto another.



### 6.3.1. Logistic unit is full

After pressing the **Logistic unit is full** button, confirm that the logistic unit is full.

Press **No** to proceed the picking onto the same logistic unit.

Press **Yes** to continue the picking onto another logistic unit. The logistic label will be printed. See: [9. Labels printed.](#)

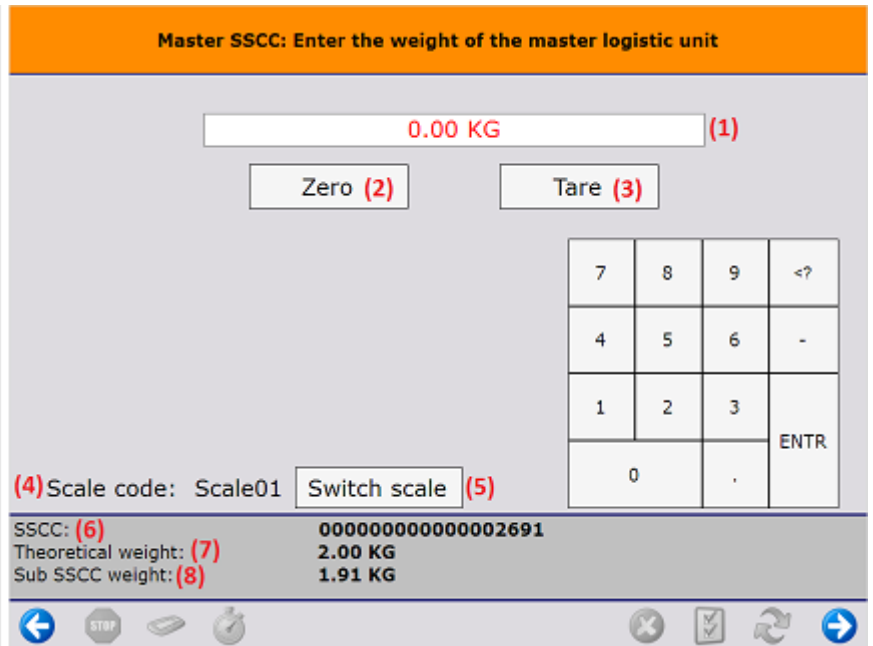
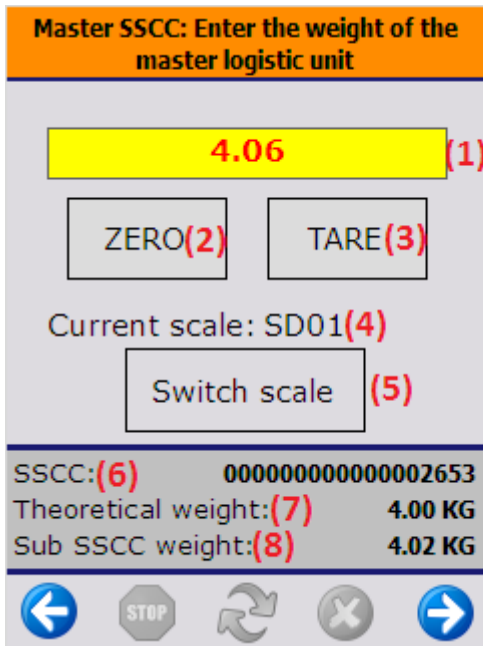
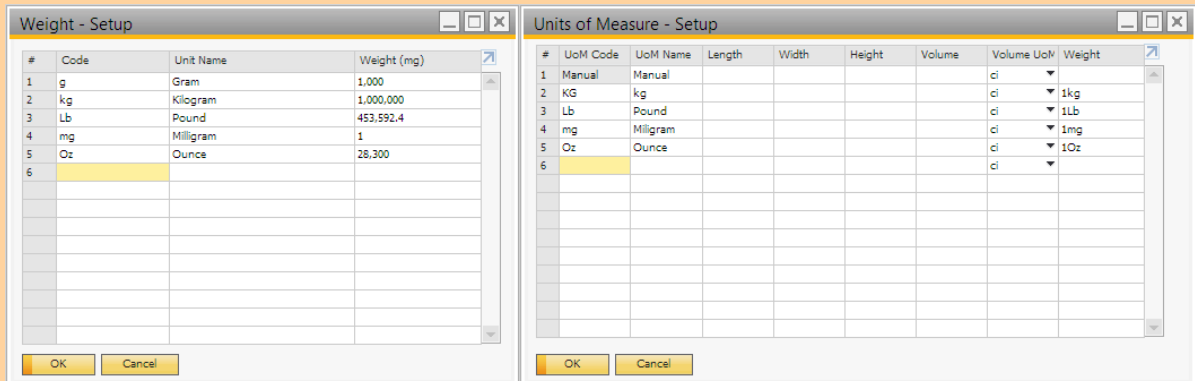
Then select a new logistic unit to continue picking the remaining number of items.



#### 6.3.1.1. Capture weight

If the 'Ask weight?' or 'Ask weight Sub SSCC?' option is set to true on the [Produmex pick list types user table](#) for the pick list, and there is a [scale](#) defined under the shipping dock/packing line, the weight of the logistic unit can be measured on the connected scale after the logistic unit is finished.

Make sure that conversions between the units of measurements are set up correctly on the Units of Measure - Setup (OUOM) and Weight - Setup (OWGT) SBO standard tables.

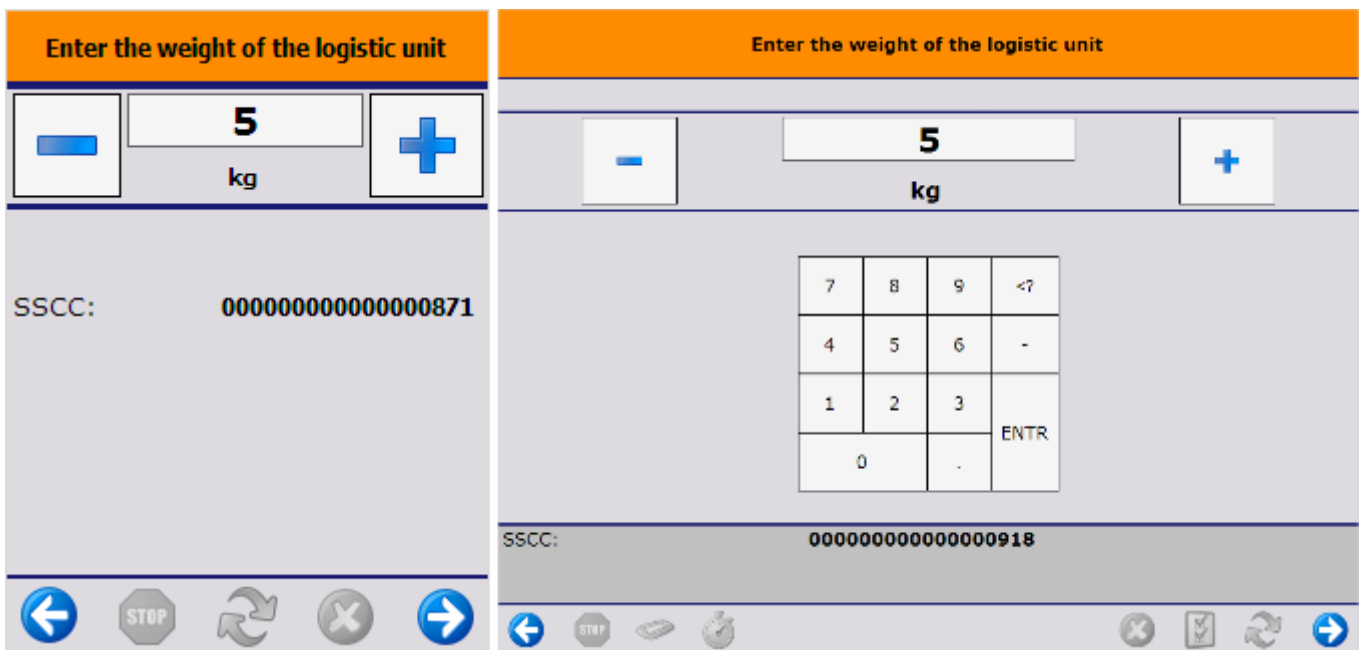


1. The measured weight. The UoM is the UoM defined for the scale. The number of decimals displayed depends on the scale accuracy.  
This field is automatically filled with the weight measured on the connected scale. It is possible to manually overwrite the measured weight.  
If the weight is manually added or the connection to the scale is lost, the value starts flickering in red.
2. If the [scale](#) has a defined zero command, the 'Zero' button is displayed.
3. If the [scale](#) has a defined tare command, the 'Tare' button is displayed.
4. The code of the connected scale.
5. If there are more than one scales defined under the dock/packing line, an additional Switch scale button is displayed on the screen. Tap this button to change the scale.  
On the next screen select the scale from the list. Every scale defined under the dock/packing line is listed. After switching the scale, the screen will use the chosen scale. After proceeding with the flow, and a new weight needs to be captured, the standard logic to choose a scale is used. This means that switching scale only switches the scale for the current weighing.

- 6. SSCC number of the logistic unit.
- 7. *Theoretical weight*: The *theoretical weight* is the sum of the weight of the items on the logistic unit. The item weight can be defined on the Sales tab of the Item Master Data.
- 8. In the case of master SSCC's, an additional *Sub SSCC's weight* is shown. The value is calculated as the sum of the measured weight of the Sub SSCC's.

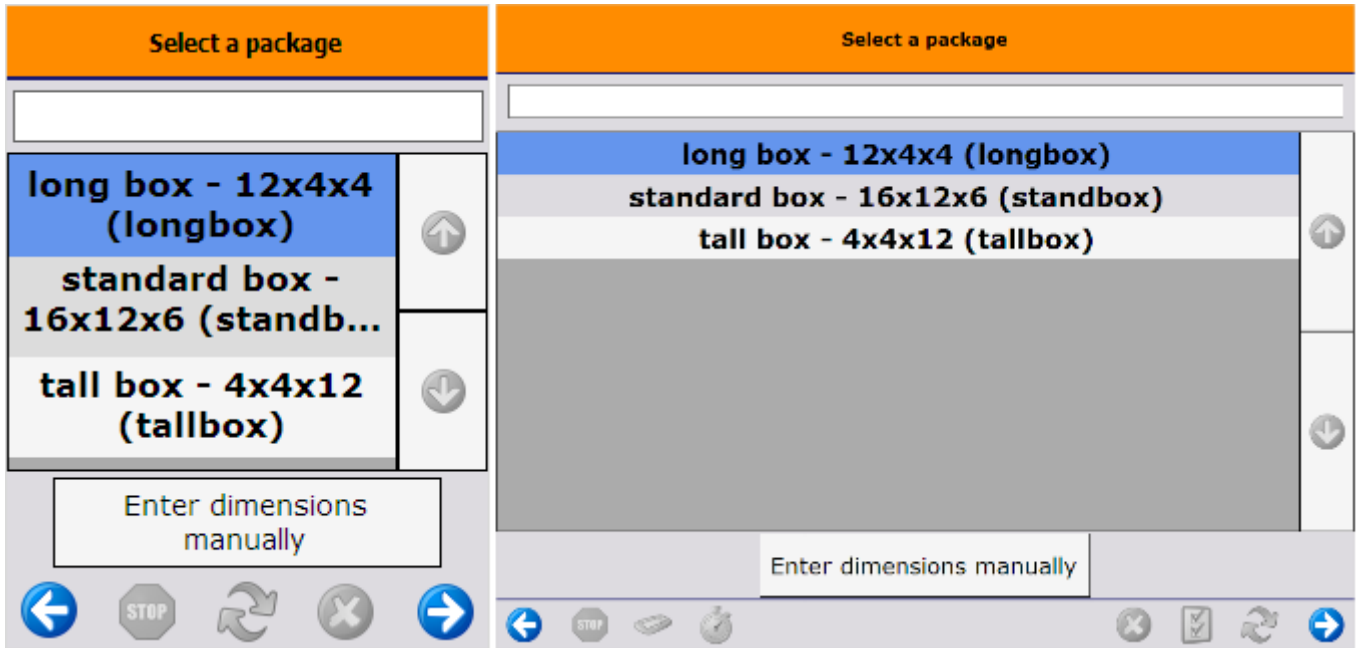
### 6.3.1.2. Enter dimensions

If the *Ask weight?/ Ask weight Sub SSCC?* option is enabled for the [pick list type](#), and there is no scale defined under the shipping dock/packing line, the user has to enter the weight of the (sub) logistic unit after it is finished. The data will be stored on the PMX\_LUID table. The unit of measure is the *Default Weight UoM* set on the Display tab of General Settings.



Based on the pick list type settings, the user might have to enter the dimension(s) of the (sub) logistic unit after it is finished.

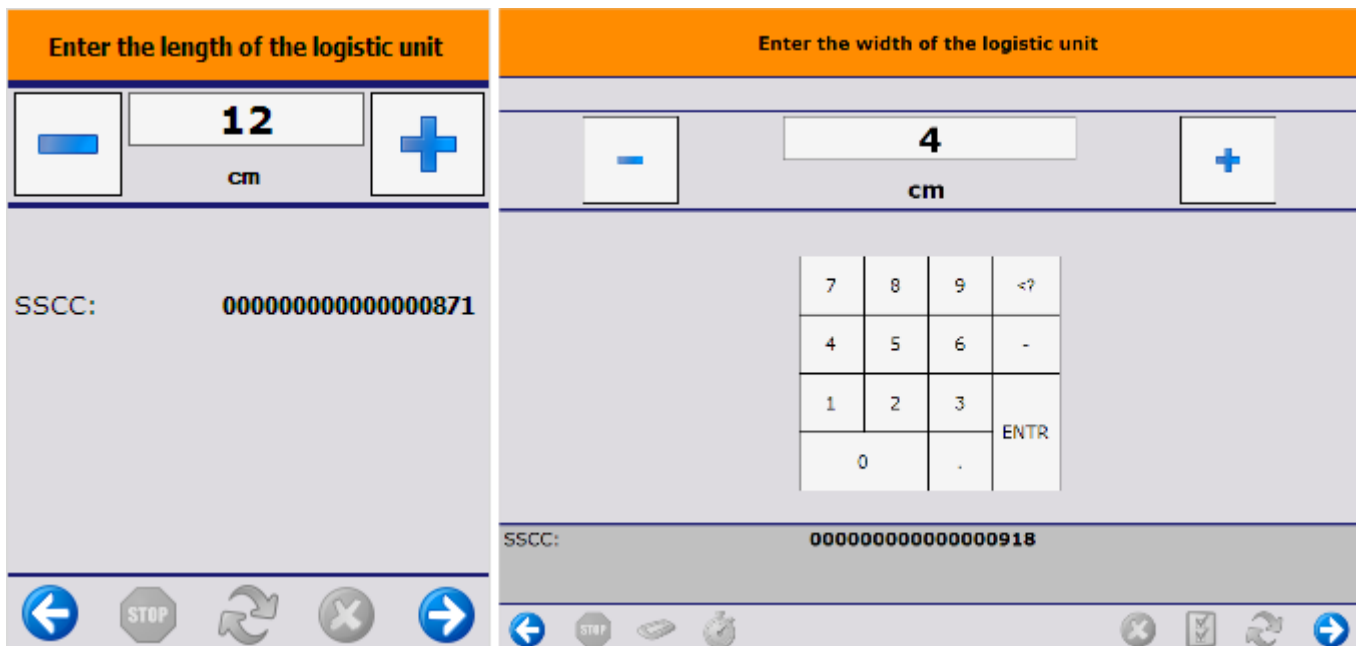
When there are package dimensions defined on the [Package Dimensions table](#), the user can select a predefined dimension instead of entering the length, the width and the height manually. The 'Select a package' screen opens. On this screen every package dimension that is not cancelled is listed. Select a dimension from the list or tap the Enter dimensions manually button.



When the Enter dimensions manually button is tapped or there are no package dimensions defined, the user has to enter the dimensions manually.

- If the *Ask length?/ Ask length Sub SSCC?* option is enabled for the [pick list type](#), the user has to enter the length of the (sub) logistic unit after the it is finished.
- If the *Ask width?/ Ask width Sub SSCC?* option is enabled for the [pick list type](#), the user has to enter the width of the (sub) logistic unit after the it is finished.
- If the *Ask height?/ Ask height Sub SSCC?* option is enabled for the [pick list type](#), the user has to enter the height of the (sub) logistic unit after the it is finished.

The data will be stored on the PMX\_LUID table. The unit of measure is the Default Length UoM set on the Display tab of General Settings.



### 6.3.2. Alternate stock

After pressing the **Alternate stock** button, the system will propose alternate items to pick. All stock that can be allocated for the pick list will be listed. Displayed information:

- Pick location
- Quantity to pick
- Item code, description and barcode
- Batch number
- Best Before Date
- SSCC if the displayed stock is full pallet

Select an item to pick and continue with the process.

When the *'Alternate: Show locked quantity for current line?'* option is enabled on the [pick list controller](#), the item that was locked for the pick list is also displayed on the list of alternate items.

When the *'Copy batch number when selecting alternate item?'* option is enabled on the [pick list controller](#), the system will copy the original proposed batch number to the selected alternate stock.

If the *Ad hoc alternate item?* option is enabled on the [picklist controller](#), the system returns to the Scan an SSCC screen instead of suggesting alternate stock.

You need to go through all the steps of stock identification. You can scan or select anything, but in the background the system validates the entered values. The system proceeds only if the identified stock is existing and can be used for picking.

If the stock is on SSCCs, you can only scan SSCC on the Scan alternate SSCC or location screen. If you do not use any SSCC, you can scan a location.

If any of the following settings are enabled on the [picklist controller](#), it is possible to pick items as alternate stock from bulk locations.

- Allow alternate stock to pick from bulk locations?
- Can the user pick bulk quantity from bulk location?
- Can the user pick full pallet from bulk location?



### 6.3.3. Skip item

After pressing the **Skip item** button, select a [reason](#) why the full quantity cannot be picked. Every reason that can be used for picking will be listed.



## 7. Identify product

Scan the product or select a product from a list after pressing the **Select a product** button. Every item on the pick location is listed.

When the 'Disable selection of items' option is set to true on the [pick list controller](#), the item cannot be selected.

Displayed information:

- Pick location
- Quantity to pick
- Item code, description, barcode
- Batch number
- Best Before Date
- Total quantity to pick (sum of the open quantities of every item on the sales order)
- SSCC number



### 7.1. Select a batch number

When there are more than one batch of the item on the pick location, it has to be verified that the right batch is picked. When the product has been identified by scanning, the system will check that whether the batch and best before date information are included in the barcode. If it is, the system will automatically proceed with that batch and best before date and skips this screen.

Select the batch from the list. The following information is displayed on the screen:

- Batch number
- Second batch number
- Best Before Date
- Quality status.

Only the allocated batch can be selected.

If the '*Auto select batch/BBD on picking?*' option is set to true on the [pick list controller](#), the system will automatically select the batch and will skip the screen automatically.



**Note:** Although the screen is labeled "**Select a Batch Number**", it is important to note that it also permits the selection of items that are NOT batch-managed e.g.: stock with different quality status to pick on the same location or if the item has best before date (with or without batch).

The user first selects a location or logistic unit. If multiple stock lines are associated with that selection, the system requires additional input to narrow down the selection to a single stock line. This screen is designed to help users narrow down their selection to a specific stock line.



## 8. Add quantity

After the product to pick has been identified, add the quantity to pick. For more information about the quantity adding screens see: [Screens for entering additional information](#).

The number of the picked items can be modified, however there is a maximum limit:

- When the quantity to pick is greater than the available quantity on the pick location, the operator cannot pick more than the available quantity.
- When the quantity to pick is less than the available quantity on the pick location, the maximum limit is the open quantity to pick, unless the '*Allow over picking*' option is set to true on the [General settings](#) tab.



## 9. Items are picked

When the quantity to pick is defined, the picking of the item is concluded. The system displays the message:



Tap on the OK button.

Note: With setting *Time to show 'item is picked' message?* on the [pick list controller](#) you can set the number of seconds during which time the *Items are picked* screen is shown or you can skip the screen.

Next step:

- If there are still items to pick, the system goes back to the [Identify pick location/source SSCC](#) screen.
- If there is no more item to pick, the system prints the logistic label (see section [9. Labels printed](#)).
- 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, the system asks if you want to print a label. To proceed with the printing click OK.

Note: If the print event is set, it is triggered when picking an SSCC and also when picking on a movable location. As the default layout for the print event is based on picking SSCC, it is recommended to create a new layout or customize the default one when picking on a movable location.

Pick list status:

- If there is no more item to pick and you have picked onto a moveable location or setting *Always status picked?* is set to true for the pick list type on the [Produmex Pick List Type UDT](#), the status of the pick list is converted to *Picked*. Otherwise, the status of the pick list is converted to *Packed*.
- If the status of the pick list is *Packed* and the *Automatic shipping* is set for the item on the sales order, the item is automatically shipped and the sales/inventory delivery is created.

## 10. Labels printed

After a pick list or a logistic unit is finished, the logistic label will be printed.  
Displayed information:

- Loading dock code
- SSCC number
- Customer code and name

Press **Yes** to reprint the label.  
Press **No** to proceed with the picking.



## 11. Count colli

When the *'Count colli after picking'* checkbox is ticked on the **'General' tab** of the Organizational Structure, a further check is applied in the end of the picking.

Enter the right number of the picked colli. The count is done in the inventory UoM.



The number of the retries can be configured on the General settings too. If the operator enters the wrong number, the system issues a warning and displays the number of the remaining retries.

If the operator exceeds the number of retry attempts, the system closes the pick list and generates a new one for the sales order in question. (Because the pick list is closed, the locking will be removed from the stock.) The system also instructs the operator to move the picked items back.



If there is *'Location after incorrect count'* defined on the **'General Settings' tab** of the Organizational Structure, the system will move the picked items to that location.

If there is no location after incorrect count defined, the picked stock will remain on the dock.



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<https://wiki.produmex.name/> - **Produmex**

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Last update: **2026/05/12 08:31**

