

6.5.1. Open Documents Report

The screen can be reached via: Produmex > Reports > Open Documents Report. On the Open documents report screen open PMX documents can be seen grouped by the document type.

Adjust the settings of the Open documents report on the [Open documents screen controller](#). On the controller the sorting order can be selected for each document type. The view and grid localization for the document types can be also customized on the controller.

Select a 'Document type' from the dropdown menu. The following document types can be selected:

- Route
- Pick list
- Pick list proposal
- Move order
- PMX Sales shipping
- Container
- Weigh order

Item:

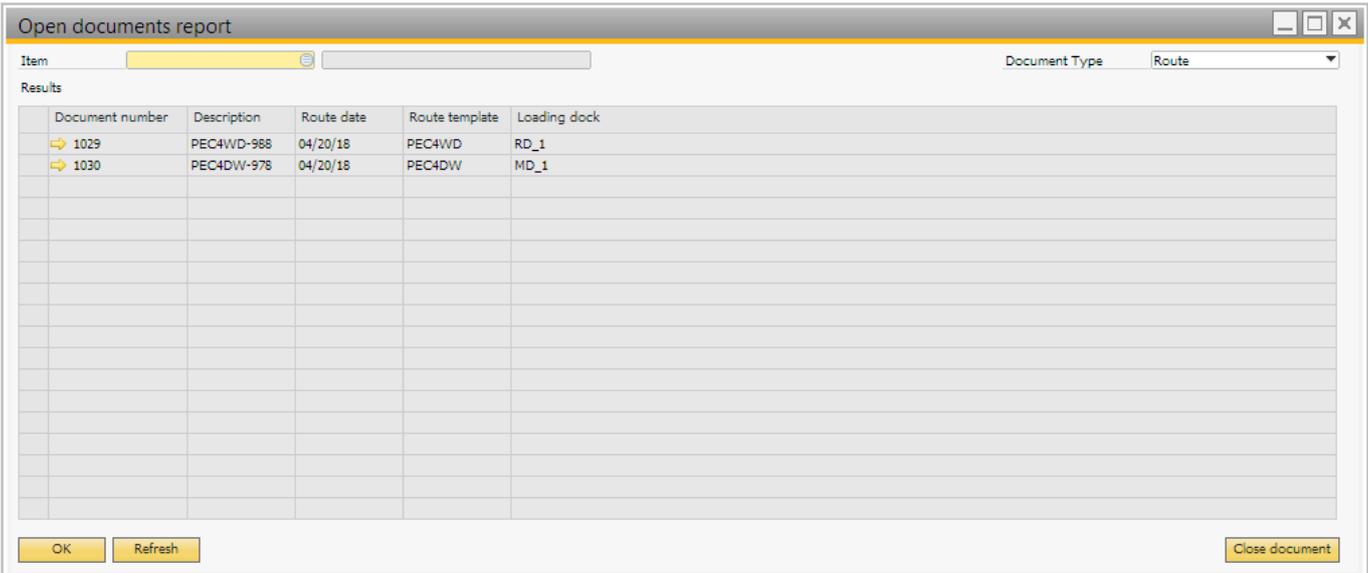
It is possible to filter the list based on the item. Enter the item code or select an item from the list.

Click on the 'Ok' button to close the screen.

Click on the  icon on the Menu Bar to refresh the screen.

Click on the 'Close document' button to close the document(s) on the selected line(s).

6.5.1.1. Route



The screenshot shows a window titled "Open documents report". At the top, there is an "Item" search field and a "Document Type" dropdown menu set to "Route". Below this is a table with the following columns: Document number, Description, Route date, Route template, and Loading dock. The table contains two rows of data:

Document number	Description	Route date	Route template	Loading dock
1029	PEC4WD-988	04/20/18	PEC4WD	RD_1
1030	PEC4DW-978	04/20/18	PEC4DW	MD_1

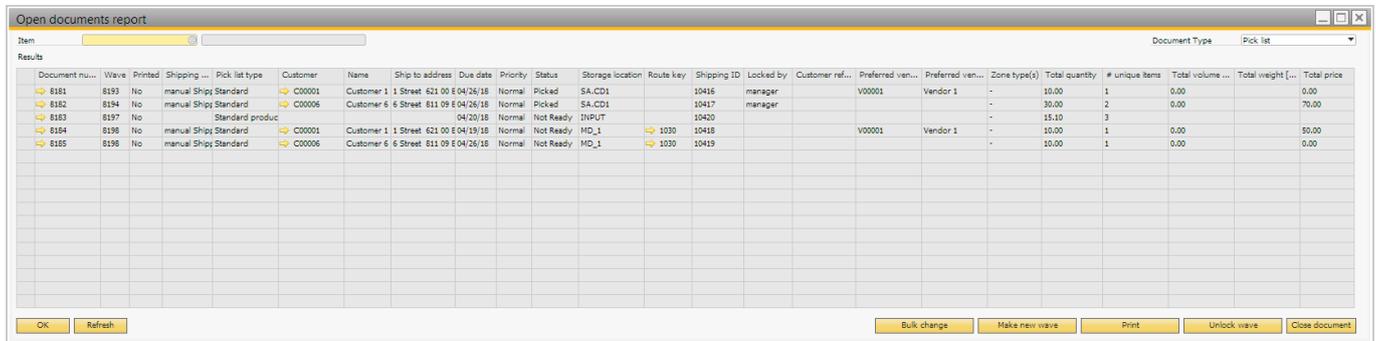
At the bottom of the window, there are three buttons: "OK", "Refresh", and "Close document".

- *Document number:* The route number.
- *Description:* The route description.
- *Route date:* The due date of the route.
- *Route template:* The route template number. The field is only filled if the route was created

from a template.

- **Loading dock:** The code of the loading dock assigned to the route.

6.5.1.2. Pick list



The screenshot shows a window titled "Open documents report" with a search bar and a dropdown menu set to "Pick list". The main area contains a table with the following columns: Document no., Wave, Printed, Shipping, Pick list type, Customer, Name, Ship to address, Due date, Priority, Status, Storage location, Route key, Shipping ID, Locked by, Customer ref., Preferred ven., Preferred ven., Zone type(s), Total quantity, # unique items, Total volume, Total weight, and Total price. The table contains four rows of data:

Document no.	Wave	Printed	Shipping	Pick list type	Customer	Name	Ship to address	Due date	Priority	Status	Storage location	Route key	Shipping ID	Locked by	Customer ref.	Preferred ven.	Preferred ven.	Zone type(s)	Total quantity	# unique items	Total volume	Total weight	Total price
6181	6193	No	manual	Shipp Standard	C00001	Customer 1	1 Street	621 00 E 04/26/18	Normal	Picked	SA.CD1		10416	manager		V00001	Vendor 1	-	10.00	1	0.00		0.00
6182	6194	No	manual	Shipp Standard	C00006	Customer 6	5 Street	811 09 E 04/26/18	Normal	Not Ready	SA.CD1		10417	manager				-	30.00	2	0.00		70.00
6183	6197	No		Standard product				04/20/18	Normal	Not Ready	INPUT		10420					-	15.10	3			
6184	6198	No	manual	Shipp Standard	C00001	Customer 1	1 Street	621 00 E 04/19/18	Normal	Not Ready	MD_1	1030	10418			V00001	Vendor 1	-	10.00	1	0.00		50.00
6185	6198	No	manual	Shipp Standard	C00006	Customer 6	5 Street	811 09 E 04/26/18	Normal	Not Ready	MD_1	1030	10419					-	10.00	1	0.00		0.00

- **Document number:** The pick list number.
- **Wave:** The wave number.
- **Printed:** Possible values: Yes/No
- **Shipping Type (Document):** The shipping type of the base document.
- **Pick list type:** The pick list type.
- **Customer:** The card code of the customer.
- **Name:** The name of the customer.
- **Ship to address:** The ship-to address.
- **Due date:** The due date of the base document.
- **Priority:** The priority of the pick list.
- **Status:** The status of the pick list.
- **Storage location:** The destination of the picking.
- **Route key:** The route number the pick list belongs to. When the pick list is not assigned to a route, this field is empty.
- **Shipping ID:** The shipping ID of the pick list.
- **Locked by:** The user who started the picking.
- **Customer ref.no.:** Customer reference number.
- **Preferred vendor:** The card code of the preferred vendor.
- **Preferred vendor name:** The name of the preferred vendor.
- **Zone type(s):** The zone type.
- **Total quantity:** The total quantity of the pick list.
- **#unique items:** The number of the items on the pick list.
- **Total volume (m3):** The total volume of the pick list displayed in m3.
- **Total weight (kg):** The total weight of the pick list displayed in kg.
- **Total price:** The total amount of the pick list proposal.

Create a new wave

Click the **Make new wave** button to create a new wave from the selected picklists.

Note: Make sure that the wave contains picklists related to the same warehouse. Waves with picklists related to different warehouses are not supported.

every selected pick list needs to be picked from the same warehouse.

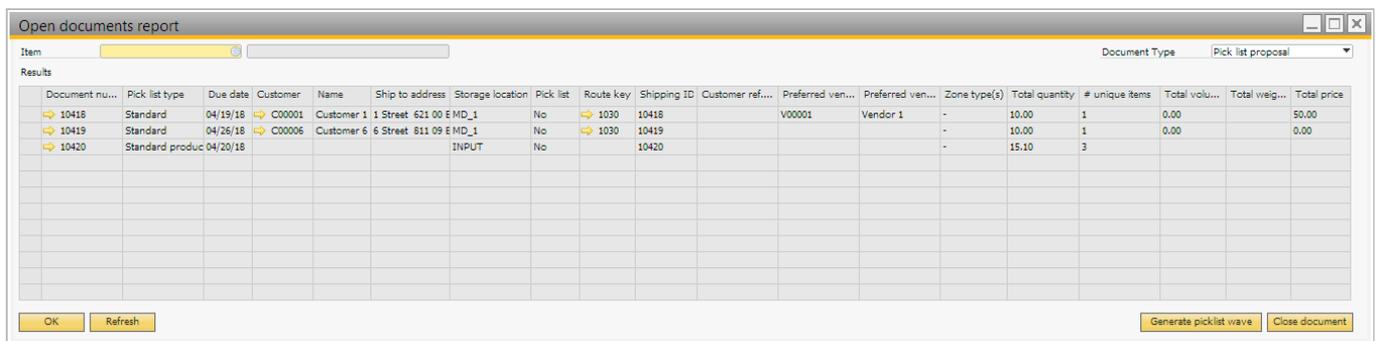
On the grid every selected pick list is listed.

Press the 'Change' button to adjust the values for every selected pick list. Only fields where a value has been selected will be adjusted.

Press the 'Cancel' button to close the screen without changing any value.

6.5.1.3. Pick list proposal

On this screen, every open pick list proposal is listed. Pick list proposals with open pick list are displayed based on the setting for the 'Show proposals with pick lists on open doc. report?' option on the [Pick List Proposal generator](#).



The screenshot shows a window titled 'Open documents report' with a search bar and a 'Document Type' dropdown set to 'Pick list proposal'. Below is a table with the following data:

Document nu...	Pick list type	Due date	Customer	Name	Ship to address	Storage location	Pick list	Route key	Shipping ID	Customer ref...	Preferred ven...	Preferred ven...	Zone type(s)	Total quantity	# unique items	Total volu...	Total weig...	Total price
10418	Standard	04/19/18	C00001	Customer 1	1 Street 621 00 E MD_1		No	1030	10418		V00001	Vendor 1	-	10.00	1	0.00		50.00
10419	Standard	04/26/18	C00006	Customer 6	6 Street 811 09 E MD_1		No	1030	10419				-	10.00	1	0.00		0.00
10420	Standard produc	04/20/18				INPUT	No		10420				-	15.10	3			

Buttons at the bottom include 'OK', 'Refresh', 'Generate pick list wave', and 'Close document'.

- *Document number*: The pick list proposal number.
- *Pick list type*: The pick list type.
- *Due date*: The due date of the base document.
- *Customer*: The card code of the customer.
- *Name*: The name of the customer.
- *Ship to address*: The ship-to address.
- *Storage location*: The destination of the picking.
- *Pick list*: Indicates whether a pick list was created based on the proposal or not.
- *Route key*: The number of the route the pick list belongs to.
- *Shipping ID*: The shipping ID of the pick list proposal.
- *Customer ref.no.*: The customer reference number copied from the sales order.
- *Preferred vendor*: The card code of the preferred vendor.
- *Preferred vendor name*: The name of the preferred vendor.
- *Zone type(s)*: The zone type.
- *Total quantity*: The total quantity of the pick list proposal.
- *#unique items*: The number of the items on the pick list proposal.
- *Total volume (m3)*: The total volume of the pick list proposal displayed in m3.
- *Total weight (kg)*: The total weight of the pick list proposal displayed in kg.
- *Total price*: The total price of the pick list proposal.

Click on the 'Generate pick list wave' button to create pick list(s) that are grouped in a wave from the selected line(s).

Click on the 'Generate pick list' button to create pick list(s) from the selected line(s). Each generated pick list has its separate wave.

The screenshot shows a window titled "Open documents report" with a search bar and a dropdown menu set to "PMX Sales shipping". Below is a table with the following data:

Document num...	Due date	Pick list type	Customer	Name	Shipping Type (D...	Customer ref. no.	Ship to address	Tracking num...	License plate	Trailer number	Driver name
1029	11/28/17	Standard	C00001	Customer 1	manual Shipping		1 Street 621 00 BRNO CZECH		ATT-9834	TRNB-8734	Trevor Birks
1030	02/16/18	Standard	C00001	Customer 1	manual Shipping		1 Street 621 00 BRNO CZECH		ARN-3487	TRNB-8216	Gert De Troyer
1031	02/16/18	Standard	C00001	Customer 1	manual Shipping		1 Street 621 00 BRNO CZECH		ARN-3487	TRNB-8216	Gert De Troyer
1032	02/16/18	Standard	C00002	Customer 2	Auto Ship		22 Street 179187 BUCHAREST		ARN-3487	TRNB-8216	Gert De Troyer

Buttons at the bottom: OK, Refresh, Create sales delivery, Print PMX sales shipping, Close document.

- **Document number:** The number of the PMX Sales Shipping document.
- **Due date:** The date when the document was created.
- **Pick list type:** The type of the base pick list.
- **Customer:** The card code of the customer.
- **Name:** The name of the customer.
- **Shipping type:** The shipping type of the base sales order.
- **Customer reference number:** The customer reference number copied from the sales order.
- **Ship to address:** The ship-to address.
- **Tracking number:** The tracking number. Based on the [shipping type](#), the user might have to add the tracking number during the picking.
- **License plate:** The [license plate](#).
- **Trailer number:** The [trailer number](#).
- **Driver name:** The name of the [driver](#). Based on the [general settings](#) for the company and the [shipping type](#), the user might have to add the license plate, the trailer number and the name of the driver during the shipping.

Click on the 'Create Sales Delivery' button to create a sales delivery document based on the selected PMX Sales Shipping document.

Click on the 'Print PMX Sales Shipping' button to print the selected document. On the opening 'Select report and printer' screen select the report and the printer. Only 'PMX Sales shipping report (PSSH-RPT)' type reports can be selected. Please note: It is not possible to print multiple PMX Sales Shipping document simultaneously.

PMX Sales Shipping

