

Warehouse Pick List

Overview

The Warehouse Pick List has been designed to add efficiency to the functions of a warehouse for the distribution of product. The collection of item from the warehouse and subsequent preparation and delivery is where this report will assist you.

Location: **Reports → Sales Reports → Inventory Sales Reports**

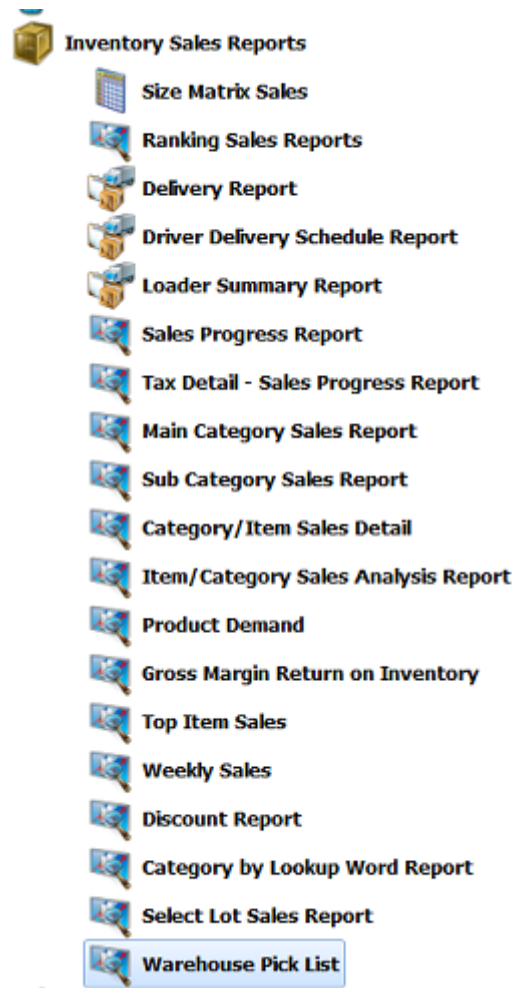


Figure 1: Warehouse Pick List in Navigator

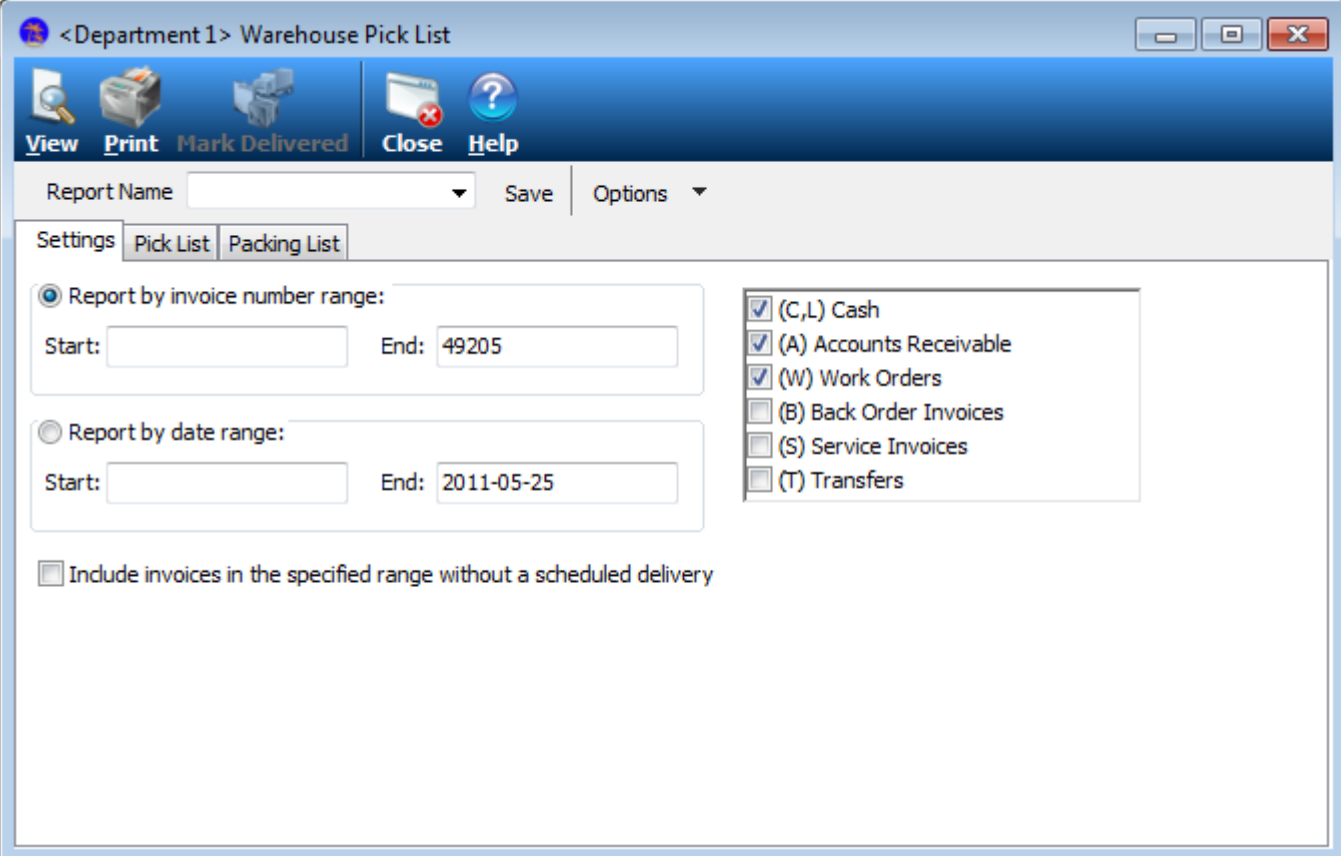


Figure 2: Warehouse Pick List Window

Option	Description
Report Name	A dropdown box listing all saved templates. Select from the list the template you'd like to use.
Save	Click to Save current template.
Options	Click to either create a new template or delete an old one. <div><div>Options</div><div>NewDelete</div></div>

Table 1: Warehouse Pick List Sub Toolbar

Warehouse Pick List Toolbar

Tool	Description
[View]	Click to generate report
[Print]	Click to print a copy of the generated report
[Mark Delivered]	Click to mark all deliveries set against work orders/invoices included in the most recent report as confirmed. This way they do not show up again in a subsequent report. <i>Note: If the 'Include invoices without a scheduled delivery' option is checked, such invoices cannot be marked as delivered, as there is no delivery to mark. Invoices on that report that do have deliveries can still be marked as usual.</i>
[Close]	Click to close Warehouse Pick List window
[Help]	Click to launch this self help

Table 1: Warehouse Pick List Toolbar Options

Warehouse Picklist Settings

Used for picking stock and packing deliveries, Warehouse Pick List consists of a pair of reports -- a [picking report](#) that totals the items and sorts them by picking location, and a [packing report](#) that combines invoices for each customer so that the items can be loaded for delivery.

Each of the two views are sorted differently to serve a different purpose.

The work orders/invoices can be selected by number or date range, filtered by invoice type, and optionally filtered by the existence of scheduled deliveries. These are all set when generating the report as shown in **Figure 1**.

Settings

Pick List

Packing List

☒ Report by invoice number range:

Start:

End:

49205

☐ Report by date range:

Start:

End:

2011-05-25

☐ Include invoices in the specified range without a scheduled delivery

☒ (C,L) Cash

☒ (A) Accounts Receivable

☒ (W) Work Orders

☐ (B) Back Order Invoices

☐ (S) Service Invoices

☐ (T) Transfers

Figure 1: Warehouse Pick List Settings Tab


Option	Description
Report by Invoice Number Range	<p>Input invoice number range you want included in the report.</p> <div> <input checked="" type="radio"/> Report by invoice number range: <div> Start: <input type="text"/> End: <input type="text" value="49205"/> </div> </div> <p><i>Note: Invoices with a scheduled delivery that has been already completed or marked as confirmed will never be included.</i></p>
Report by Date Range	<p>Input invoice date range you want included in the report.</p> <div> <input type="radio"/> Report by date range: <div> Start: <input type="text"/> End: <input type="text" value="2011-05-25"/> </div> </div> <p><i>Note: Invoices with a scheduled delivery that has been already completed or marked as confirmed will never be included.</i></p>
Include Invoices in the specified range without a scheduled delivery	<p>Tick to include invoices without a scheduled delivery.</p> <p><i>Note: If this option is checked, such invoices cannot be marked as delivered, as there is no delivery to mark. Invoices on that report that do have deliveries can still be marked as usual.</i></p>
Type of Invoice Checklist	<p>Tick all the invoice types you want included in the report.</p>






Table 1: Warehouse Pick List Settings Option

Pick List Tab

The Pick List display in which items are sorted based on location. This display is a combination of two orders, however as many orders are chosen in the setup will display on the report. This report is designed for a printed listing allowing the warehouse staff to easily collect all items for delivery from a particular location. Column sorting is available by clicking on the column header to resort ascending or descending.

This view groups quantity totals of items on selected work orders and sorts them by picking location so visiting a particular location only needs to occur once.

 <Head office> Warehouse Pick List

 View
  Print
  Mark Delivered
  Close
  Help

Settings

Pick List

Packing List

Part #	Description	Qty	Location
M268-00	4 Pc. Navy Mug Set	1.00	A-AA-10-1000
M182-00	4 Pc. Blue Flower Glassware Set	2.00	A-AA-AA-AAAA
M268-03	4 Pc. White Mug Set	2.00	A-AA-AA-AAAA
U015-00	7-Pc. Kitchen Tool Set	1.00	A-AA-AA-AAAA
U013-00	7 Pc. Plastic Kitchen Tool Set	1.00	S-AA-00-0000
M268-01	4 Pc. Hunter Green Mug Set	1.00	S-AA-10-1000
M261-00	4 Pc. Tulip Glassware Set	2.00	S-AA-20-1000
U164-00	Deluxe Flatware Set	1.00	S-BB-00-0000
U191-00	Heirloom Flatware Set	2.00	S-BB-00-0000
U006-00	13 Pc. Oak Block & Knife Set	1.00	S-CC-00-0000

Figure 1: Warehouse Pick List Pick List Tab

Grid Header	Description
Part Number	Part number of the items in the invoice
Description	Description of the item
Qty	Quantity of the item
Location	Postal Code of the item

Figure 2: Warehouse Pick List Grid Headers

Warehouse Packing List Tab

The Packing List tab contains the same information only grouped by Customer, listing all product ordered for the customer and sorted by postal code. The last column contains the postal code and assumes that this would be the order in which the truck would be packed for logical delivery routing.

This view groups items based on the work order so the items can be gathered and packed on the truck as they will need to be delivered to the customer. This view sorts based on postal code for logical packing and unpacking at customer locations.

ViewPrintMark DeliveredCloseHelp

Report Name

SaveOptions

SettingsPick ListPacking List

Fenton, Marie			
678 Coronation St. West Bank			85241
Part #	Description	Qty	
M182-00	4 Pc. Blue Flower Glassware Set	2.00	
M261-00	4 Pc. Tulip Glassware Set	2.00	
M268-00	4 Pc. Navy Mug Set	1.00	
M268-01	4 Pc. Hunter Green Mug Set	1.00	
M268-03	4 Pc. White Mug Set	2.00	
Smith Construction Co.			
1234 Anywhere Street Seattle			98123
Part #	Description	Qty	
U006-00	13 Pc. Oak Block & Knife Set	1.00	
U013-00	7 Pc. Plastic Kitchen Tool Set	1.00	
U015-00	7-Pc. Kitchen Tool Set	1.00	
U164-00	Deluxe Flatware Set	1.00	
U191-00	Heirloom Flatware Set	2.00	

Figure 1: Warehouse Pick List Packing List Tab

Grid Header	Description
Part Number	Part number of the items in the invoice
Description	Description of the item
Qty	Quantity of the item
Location	Postal Code of the item

Figure 2: Warehouse Pick List Packing List Grid Headers

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