InventoryControl: How to Create a Pick Order

Sicaro - 2023-01-19 - Version 7

Creating a Pick Order

This function applies to Pro and Enterprise Version users only.

Note: For information on the benefits of upgrading your version of InventoryControl or WaspNest Inventory, please select **Help > Benefits of Upgrading** on the Main window.

Pick orders are created to designate certain inventory to be shipped to a customer. On the **Create New Pick Order** screen, you are creating an order that tells your staff to get the order ready and what inventory to include. These orders can be sent to the mobile devices (although pick orders cannot be created on mobile devices). After the order has been picked, you need to mark it as ready to be shipped on the **Pick Order** screen accessed from the **Receive/Pick** menu. At this point, the inventory is removed from the system. For more information on the **Pick Order** screen, please refer to the **Shipping Pick Orders** topic.

We recommend you review InventoryControl v7 Pick Order Overview (linked below) before creating pick orders for the first time.

Creating New Pick Orders

1. From the **Main Window**, select **New > Pick Order**.

OR

From the **Main Menu**, click **Lists > Pick Order**. On the **Pick Order List**, click the **New** icon.

The **Create New Pick Order** screen appears.

Note: The **Tax** field at the bottom, right of the screen only appears if you have turned on the **Show Price option on the Options** screen.

Notice that the screen prominently displays the status as **New**. This status message changes based on the state the order is in.

Possible statuses are:

-**New** - This always displays when creating a new order.
-**Issued** - Once the pick order is printed or emailed, the status changes to **Issued**.
-**In Process** - Once the order has started to be picked (via the **Pick Order** screen accessed from the **Receive/Pick** menu), the -status becomes In Process and the Picked Quantity will display for each item on the order.
-**Overdue** - This status can appear for **New** or **In Process** orders that have passed the designated due date. These orders will appear with a symbol on the **Pick Order** List to alert you of their overdue status.
-**Closed** - This status means the order has been completed and marked as closed.
Note: To prevent fields from clearing, click the pushpin button located to the right of the field you want to lock. Pushpins can be used to lock the values in all but one required field so that a scanner can be used to rapidly add inventory just by repeatedly scanning barcodes into that field.

Clicking the pushpin button will unlock the field.

2. Enter a **Pick Order Number**. Each pick order is assigned a unique identifier consisting of an alpha-numeric

value up to 36 characters. This number can be manually entered each time you create a new pick order or you can create a template that the software will use to automatically generate a number for you. If you have set up a template, click the **Generate** button to have InventoryControl create and assign an order number. The template can contain any combination of custom text, dates and/or counters enabling you to create a unique identifier that is meaningful to your company.

3.Enter a Customer in the **Customer** field. You can scan a value into this field, manually enter a value or click on the field to view a drop down list. The list contains the last 10 Customers selected on this screen. Select **<MORE>** to view the entire **Customer List** or click **<New>** to go to the **Create Customer Supplier** screen to add a new customer to the database.

When a customer is selected, the **Customer Address** information automatically populates. If the selected customer has more than one address entered for it, you can select the **Address Type** from the drop down list.

4. Enter an **Order Date** for this order. This date defaults to today, but you can change this date by clicking the down arrow and selecting a new date.

5. Enter a **Due Date** for this order. You can type in a date in this field or click the down arrow to select a date.

6. Enter a **Reference Number** for this **Pick Order** (optional).

7. Select the preferred shipping method for this order in the **Ship Via** field from the drop down list. This list contains several commonly used shipping methods, however; you can type in a new shipping method if desired. The new entry will appear in the drop down list for future purchase orders.

Note: If you need to delete a **Ship Method** you have entered, you can do so on the **Manage Ship Methods** screen. This screen also allows you to **Print**, **Export** and **Add New** methods.

8. Enter any notes you want to associate with this order in the **Notes** field.

9. Now you are ready to enter your item information in the **Line Item Details** section. Complete this information as follows:

-Type - Select the type of item that needs to be picked. Options are:
Inventory - This item is in your inventory database. Use this to pick existing items.
Non-Inventory - This item is not in your inventory database. Use this to pick items that you do not want to appear in your inventory database, such as marketing fliers or business cards.
Assembly - **Assembly Items** are a collection of items that, once grouped, are considered to be a new, single item. Assembly Items are pre-assembled and kept in stock.
Kit - Kit items are a collection of items that are grouped, or picked, at the time they are sold.
Manual - Use this option to add one-time items, such as shipping and handling, to an order. Manual items cannot be picked on the mobile devices.

-**Item Number** - Enter the **Item Number** of the item you want to add to the order. To enter an **Item Number,** you can type or scan the value into the field, or you can use the drop down list to see the first 10 items in the database, select **<more>** on the drop down list to see all items in the **Item** List.

You can create a new item by selecting **<New>** or by entering an unknown item number. When either of these two situations occur, the **Create New** Item screen appears.

When you enter an **Item Number** the **Description** field populates.

Request Qty - Enter the requested number of this item. This value can also be scanned. You cannot enter negative numbers. You can enter any item held in your inventory in any amount on this screen. Actual on-hand amounts are not checked at this point so you are not limited to creating pick orders for the quantity of items in your inventory.

Stocking Unit - This field displays the stocking unit entered for this item on the New Item/Edit Item screen. The stocking unit represents how you stock this item in your inventory. For instance, if you stock the unit in boxes of 10. Box of 10 would display in the Stocking Unit field on this screen.

Description - This field populates after the item number is entered and cannot be changed on this screen. If you need to change the description, you can do so on the Edit Item screen.

10. **Email on Save** - If this box is checked, a copy of this order is automatically sent to the email address listed in the Customer screen for this customer when you click the **Save** button. If you have selected to view the **Email Destination List** (selected on the **Options** screen), the list will appear allowing you to select email

addresses or change email addresses as needed. If you have selected not to view the list, the order will automatically be sent ***to*** the email address listed in the **Customer** screen ***from*** the email address listed in the logged in user's network email setting. Please note that if the email address is not entered on the **Customer** screen or the logged in user does not have an email address, you will receive an error message when you try to send emails.

11. Click **Save** to save this order to the database. A newly created pick order has a status of **New**. The status remains **New** until pick quantities are entered on the Pick screen. If the order becomes overdue before it begins to be picked, the status changes to **New- Overdue**.

Related Articles:

InventoryControl v7 Pick Order Overview
https://support.waspbarcode.com/kb/articles/796

How to Pick an Order from InventoryControl
https://support.waspbarcode.com/kb/articles/794