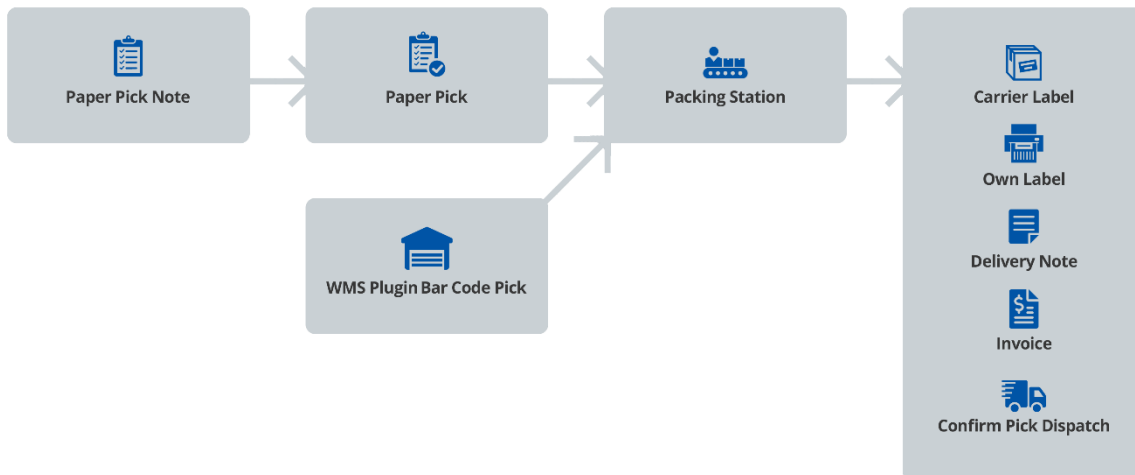


Option 1 : Paper Pick Note

You can print pick notes in Route/Bin order (the Route is the way to go around the warehouse for maximum efficiency) based on fully allocated or partially allocated item lines.

You may use this pick note as a packing note or print an additional copy as a delivery note at this stage or at confirm pick.

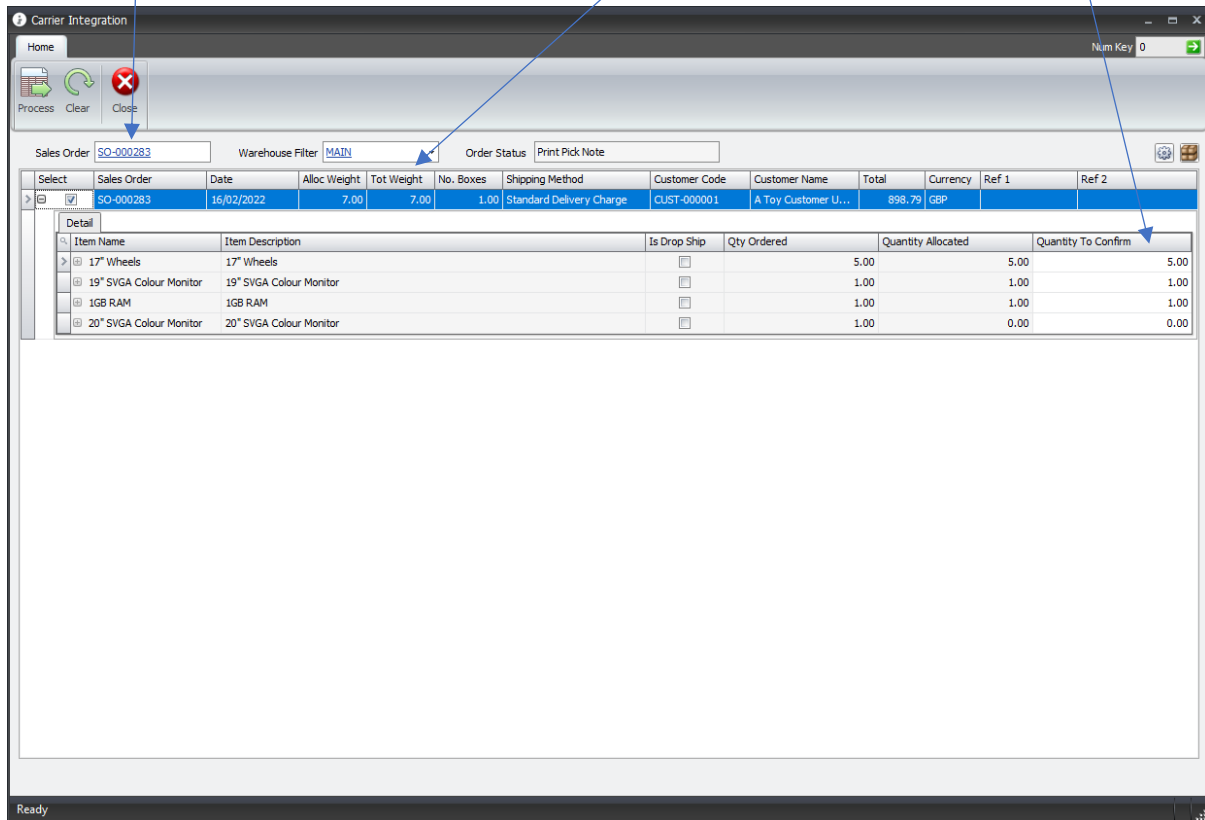


You pick the goods and bring them to the packing area to the Packing Station. Usually the packing station is a computer with USB scanner, label printer and A4 laser printer. Maybe you have some scales to confirm weight.



We have a Packing Station feature in the Carrier Integration plugin that allows a user to scan or enter the SO bar code on the top right of the pick note to open the order details. When displayed the user can confirm the qty picked on item lines, batch or serials if applicable, the total weight, number of boxes, shipping method and service codes if it needs changing.

Screen Shot of Packing Station form below:



A warehouse filter would only show orders for specific warehouse and is saved by last one used for each user.

You can open an already processed order to print again. (NB If you made a mistake on qty, weight or shipping method then you would need to void the Invoice or Dispatch to process it again).



The screenshot shows the 'Carrier Integration' window with a 'Home' tab. At the top, there are fields for 'Sales Order' (SO-000432), 'Post Code' (M54 5TG), and 'Warehouse Filter' (MAIN). Below this is an 'Overall' summary table and a 'Ship To Name and Address' field containing 'A Toy Customer UK Ltd, 845 Evergreen Terrace, Eastham Road, M54 5TG'. The main area displays a list of sales orders for the same customer, filtered by the same shipping address post code. Each order entry includes a date, allocated and total weights, number of boxes, shipping method, customer code, customer name, and allocated total. Below each order is a 'Detail' table with columns for Item Name, Item Description, Is Drop Ship, Qty Ordered, Quantity Allocated, and Quantity To Confirm.

Select	Date	Alloc Weight	Tot Weight	No. Boxes	Shipping Method	Customer Code	Customer Name	Alloc Total	Currency	Ref 1	Ref 2
>	Sales Order: BKO-00011-1										
	01/11/2017	0.00	0.00	1.00	Standard Delivery Charge	CUST-000001	A Toy Customer UK Ltd	180.00	GBP		
Detail											
	Item Name	Item Description	Is Drop Ship	Qty Ordered	Quantity Allocated	Quantity To Confirm					
	17" Wheels	17" Wheels	<input type="checkbox"/>		5.00	5.00	5.00				
>	Sales Order: BKO-00036-1										
	08/06/2020	2.00	0.00	3.00	Standard Delivery Charge	CUST-000001	A Toy Customer UK Ltd	0.00	GBP		SO-000036
Detail											
	Item Name	Item Description	Is Drop Ship	Qty Ordered	Quantity Allocated	Quantity To Confirm					
	Hand Gun	Hand Gun	<input type="checkbox"/>		2.00	2.00	0.00				
>	Sales Order: BKO-00053-1										
	21/01/2022	1.00	1.00	1.00	Standard Delivery Charge	CUST-000001	A Toy Customer UK Ltd	32.40	GBP		SO-000053
Detail											
	Item Name	Item Description	Is Drop Ship	Qty Ordered	Quantity Allocated	Quantity To Confirm					
	17" Wheels	17" Wheels	<input type="checkbox"/>		1.00	1.00	1.00				
>	Sales Order: BKO-00056-1										
	21/01/2022	1.00	1.00	1.00	Standard Delivery Charge	CUST-000001	A Toy Customer UK Ltd	32.40	GBP		
Detail											
	Item Name	Item Description	Is Drop Ship	Qty Ordered	Quantity Allocated	Quantity To Confirm					
	17" Wheels	17" Wheels	<input type="checkbox"/>		1.00	1.00	1.00				

We also have a Consolidated Packing station option that will show all orders for the same customer in case you wanted to try to ship more items for the same customer on the same delivery. This is filtered by same shipping address post code.

The screenshot shows the 'Carrier Integration' window with a 'Scan Mode' option selected. The 'Sales Order' field is SO-000511, and the 'Ship To Address' is the same as in the previous screenshot. The main table shows a consolidated list of items for this order, including '17" Wheels', '19" SVGA Colour Monitor', '19" SVGA Colour Monitor', 'NONSTOCK', and '19" SVGA Colour Monitor'. The 'Scan Mode' window is open, showing a 'Scan Away' field and a table with columns for Item Name, Item Description, UOM, LPC, Qty Ordered, Qty Allocated, Qty To Confirm, and Qty Scanned. The 'Scan Mode' window also has a 'Customer Receipt' icon.

Select	Sales Order	Date	Alloc Weight	Tot Weight	No. Boxes	Shipping Method	Customer Code	Customer Name	Total	Currency	Ref 1	Ref 2
>	SO-000511	26/01/2026	3.00	3.00	1.00	Standard Deliver	CUST-000001	A Toy Customer UK	3,084.79	GBP		
Detail												
	Item Name	Item Description	Is Drop Ship	UOM	Qty Ordered	Quantity Allocated	Quantity To Confirm					
	17" Wheels	17" Wheels	<input type="checkbox"/>	EACH	3.00	3.00	3.00					
	19" SVGA Colour Monitor	19" SVGA Colour Monitor	<input type="checkbox"/>	EACH	2.00	2.00	2.00					
	NONSTOCK	<NONSTOCK>	<input type="checkbox"/>	EACH	1.00	1.00	1.00					
	19" SVGA Colour Monitor	19" SVGA Colour Monitor	<input type="checkbox"/>	Box(10)	1.00	1.00	1.00					

There is a Scan Mode option that allows a packer to scan all items again. This works for single or consolidated (multiple) sales orders going in the same box for same customer.



Every order has a shipping method. Behind every Shipping Method we have the option to automatically do a mixture of the following at the Packing Station :

1. Confirm Pick or Confirm Pick Dispatch or None
2. Book Delivery with Ship Theory API and Get Tracking URL, Or Create a Carrier File, Or Use TrackPOD API etc.
3. Print Label(s) Ship Theory Carrier or Own Delivery
4. Print Delivery note and or Invoice

Packing Setup form below:

The screenshot shows the 'Carrier Integration Setup' window with the 'Carrier Packing Station' tab selected. Under the 'Use' section, 'Confirm Pick & Despatch' is selected. Below is a table of actions and their status for various carriers.

	APC-UK Mainland (3-5 Days)	APC-UK Mainland (3-5 Day...	APC-UK Mainland (Pre12:00)	APC-UK Mainland (Pre12:0...	Order Value Amount	Order Value Amount Layouts	RM 1	RM 1 Layouts
Print Delivery Note	<input checked="" type="checkbox"/>	SO Delivery Note	<input checked="" type="checkbox"/>	SO Delivery Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Print Invoice/Delivery Note	<input type="checkbox"/>	Delivery Note	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Print Own Delivery Label(s)	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Order in Shiptheory	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Print Shiptheory Carrier Label(s)	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email Warehouse	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create APC File	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create CSV File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create DFD File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create MaxOpra File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create MaxOpra V2 File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Own Transport File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Royal Mail Parcel File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Shipmate File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create TNT File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create TradPOD File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create UKMail File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create UPS Worldship File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create XDP File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create XML File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Pallex Fortec File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create DHL File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create TradPOD V2 File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create TradPOD V3 File	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

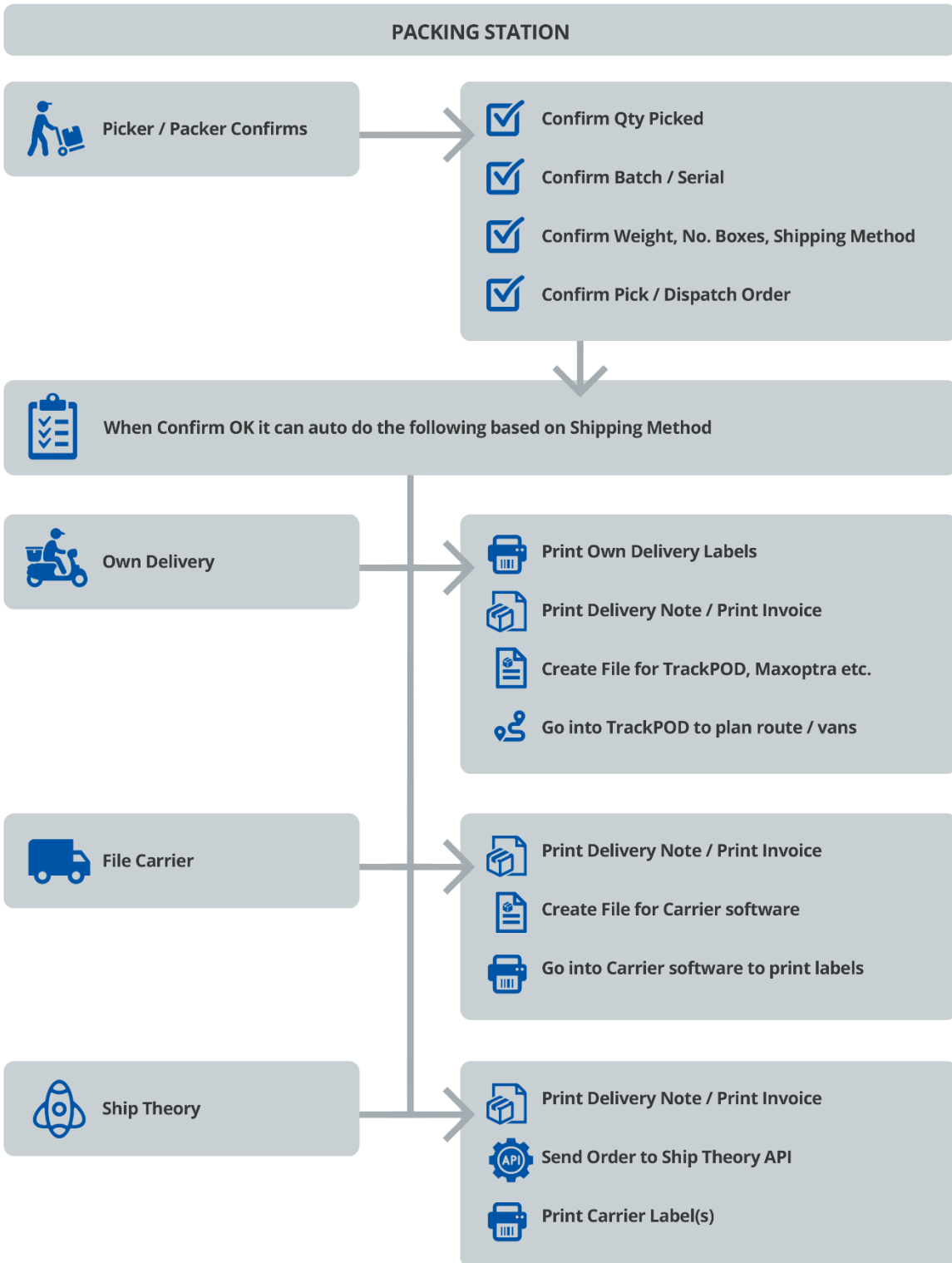
The advantage of the Packing Station is that it does not matter whether the order is for Own delivery, Carrier file or Shiptheory etc. it knows what to do and print.

i.e. you may do a mixture of Own Delivery maybe for Local orders and Carriers for everything outside. This simplifies and speeds up the process for the Picker / Packer.



Warehouse	Sales Order	SO Ref 1	Order Date	Customer Name	No. Box Labels	Shipping Method	Carrier Name	Route Code	Route Name	Shipping Date	OK To Ship	Overall Due Date	Allocation Status	Order Status	Allocated Weight
Warehouse: LON	SO-000155		25/09/2019	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		25/09/2019		25/09/2019	Allocated	Ready To Invoice	2.00
	SO-000254		11/11/2021	Marsdon Toys	1	Standard Delivery Charge		001		11/11/2021		11/11/2021	Partial	Print Pick Note	1.00
Warehouse: HIN	SO-000022-1		16/01/2019	A Toy Customer UK Ltd	1	Standard Delivery Charge		001	30 09 2019 Van1	14/12/2017		13/01/2018	Unallocated	Print Pick Note	0.00
	SO-000036-1		08/04/2020	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		14/12/2017		08/07/2020	Allocated	Print Pick Note	2.00
	SO-000035-1		22/09/2021	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		01/05/2018		01/05/2018	Allocated	Print Pick Note	1.00
	SO-000027-1		14/02/2022	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		15/11/2021		15/11/2021	Unallocated	Print Pick Note	0.00
	SO-000056		01/05/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		01/05/2018		01/05/2018	Allocated	Ready To Invoice	3.00
	SO-000037		11/05/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		11/05/2018		11/05/2018	Allocated	Print Pick Note	2.00
	SO-000038		11/05/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		11/05/2018		11/05/2018	Allocated	Dispatched	3.00
	SO-000039		16/05/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		16/05/2018		16/05/2018	Allocated	Print Pick Note	2.00
	SO-000040		16/05/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		16/05/2018		16/05/2018	Partial	Print Pick Note	1.00
	SO-000062		21/05/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		21/05/2018		21/05/2018	Allocated	Print Pick Note	3.00
	SO-000063		06/06/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		06/06/2018		06/06/2018	Allocated	Print Pick Note	2.00
	SO-000065		11/07/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		11/07/2018		11/07/2018	Allocated	Print Pick Note	0.00
	SO-000066		12/07/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		12/07/2018		12/07/2018	Allocated	Print Pick Note	2.00
	SO-000067		03/08/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		03/08/2018		03/08/2018	Allocated	Print Pick Note	2.00
	SO-000068		03/08/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		03/08/2018		03/08/2018	Unallocated	Print Pick Note	0.00
	SO-000071		15/08/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		15/08/2018		15/08/2018	Allocated	Print Pick Note	2.00
	SO-000072		05/09/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		05/09/2018		05/09/2018	Allocated	Print Pick Note	3.00
	SO-000073		10/09/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		10/09/2018		10/09/2018	Allocated	Print Pick Note	2.00
	SO-000074		10/09/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		10/09/2018		10/09/2018	Allocated	Print Pick Note	2.00
	SO-000075		10/09/2018	Arden Cycles	1	Standard Delivery Charge		001		10/09/2018		10/09/2018	Allocated	Print Pick Note	2.00
	SO-000076		12/09/2018	Arden Cycles	1	Standard Delivery Charge		001		12/09/2018		12/09/2018	Allocated	Print Pick Note	2.00
	SO-000077		12/09/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		12/09/2018		12/09/2018	Allocated	Print Pick Note	0.00
	SO-000078		21/09/2018	Bikes and Trikes Ltd	1	Standard Delivery Charge		001		21/09/2018		21/09/2018	Allocated	Print Pick Note	0.00
	SO-000079		21/09/2018	Bikes and Trikes Ltd	1	Standard Delivery Charge		001		21/09/2018		21/09/2018	Allocated	Print Pick Note	3.00
	SO-000080		25/09/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		25/09/2018		25/09/2018	Allocated	Print Pick Note	1.00
	SO-000081		25/09/2018	A Toy Customer UK Ltd	1	Standard Delivery Charge		001		25/09/2018		25/09/2018	Allocated	Print Pick Note	0.00
	SO-000082		26/09/2018	A US Customer Inc	1	Standard Delivery Charge		001		26/09/2018		26/09/2018	Allocated	Dispatched	1.00
	SO-000083		27/09/2018	A US Customer Inc	1	Standard Delivery Charge		001		27/09/2018		27/09/2018	Unallocated	Print Pick Note	0.00

If all you need to do is produce a file for many sales orders, for your carrier software then you can do this with the Carrier integration form above.





interprise suite™



Example Scenarios :

Shipping Method - Own Local Delivery

This could Confirm Pick the Order, print the Own Delivery Label(s), Delivery Note and if you are using Route planning software we use TrackPOD API, or drop files for Maxoptra etc.



TrackPOD not only helps you plan routes, vans but it has a complete POD system on PDA as an option.

In the Paperless plugin you can batch scan all the signed delivery notes and auto attach them to the sales order or invoice. This saves having to store them and they are saved with the order. See: <https://www.interprise.co.uk/interprise-suite-knowledge-base/paperless-supplier-bills/>

Shipping Method - Carrier File

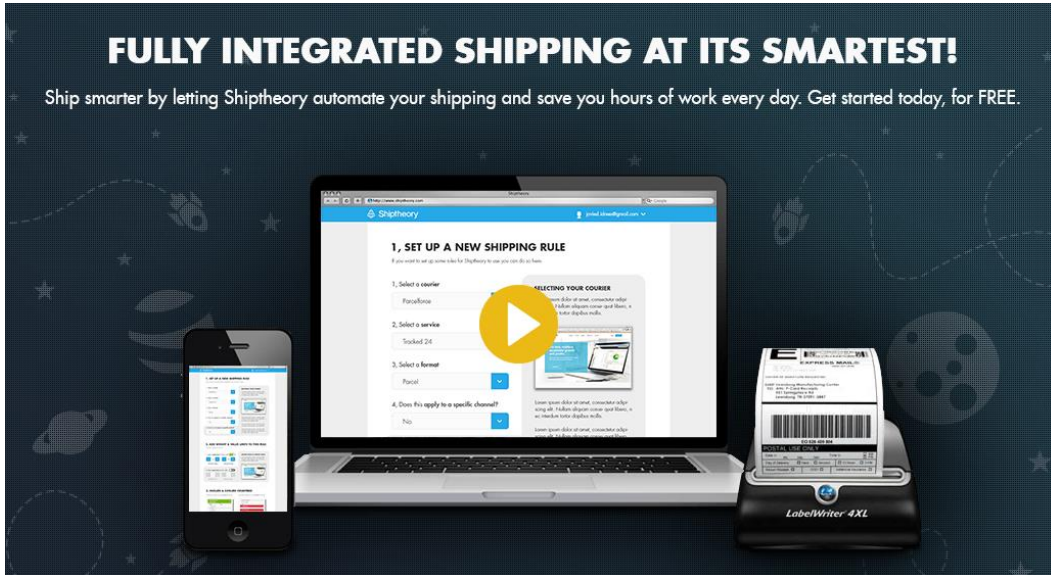
This could Confirm Pick the Order, Print the Delivery Note and drop a file for your Carrier software. Then you would go into your carrier software to book the delivery and print the carrier label(s).

We have created File layouts for Royal Mail, APC, DPD, DHL, UK Mail, TNT, XPD, UPS Worldship, PallexFortec. These files contain similar information so if you have a file layout we can usually create it.



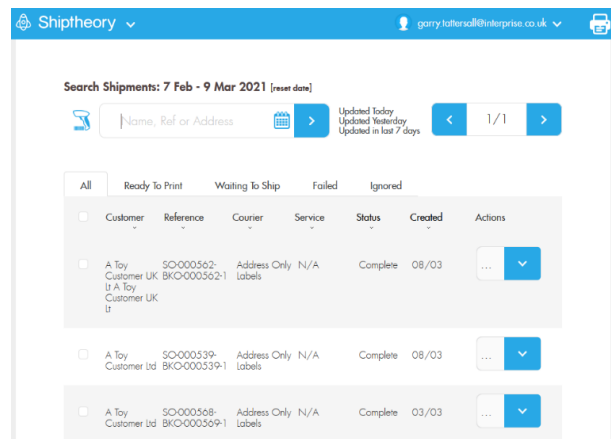
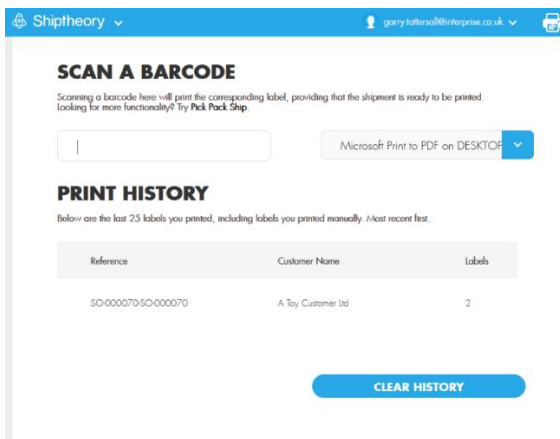
Shipping Method - Ship Theory API

This could Confirm Pick the Order, Print the Delivery Note, send the order to Ship Theory using their API, save with the order the label and tracking url and print the carrier label(s). This is obviously very efficient.



Ship Theory integrates to many carriers. You can also set business rules based on weight, order value, shipping method etc. to decide which carrier / service to use. Using shipping method this is dictated from the order.

If you needed to change more than weight and number of boxes you can scan the SO code into the Ship Theory UI and change more details to print the carrier labels. If this is the case for the majority of orders for a shipping method then you would set the shipping method to not print the carrier label as it would be better to do this from Ship Theory.



If 95% of the time you use 1 parcel for orders and you have the stock then you could print the carrier label as part of the pick note. This would require all sales order information to be sent to Ship Theory in an automated way as we need the Carrier label before we print the picking note to do this. The Carrier Integration plugin can operate this way if required.



We have two options in Interprise around Confirm Pick:

- Confirm Pick creates an Invoice and it has to be posted to create a back order.
- Or we have Confirm Pick Dispatch which creates the back order immediately and creates a Dispatch for the shipped goods. These dispatches can then be invoiced individually or as a consolidated invoice for customers who want a consolidated invoice.

It should be noted that Carrier software should email/sms the customer a tracking url as part of booking a delivery. If you use Ship Theory then we store the label and tracking url with the order as well.

We recommend users start with Option 1.

Option 2: Add Consolidated Paper Pick Note

In addition to the above you could decide to print pick notes as a wave so you select for example 10 sales orders and not only select the pick note layout but also a consolidated pick note layout.

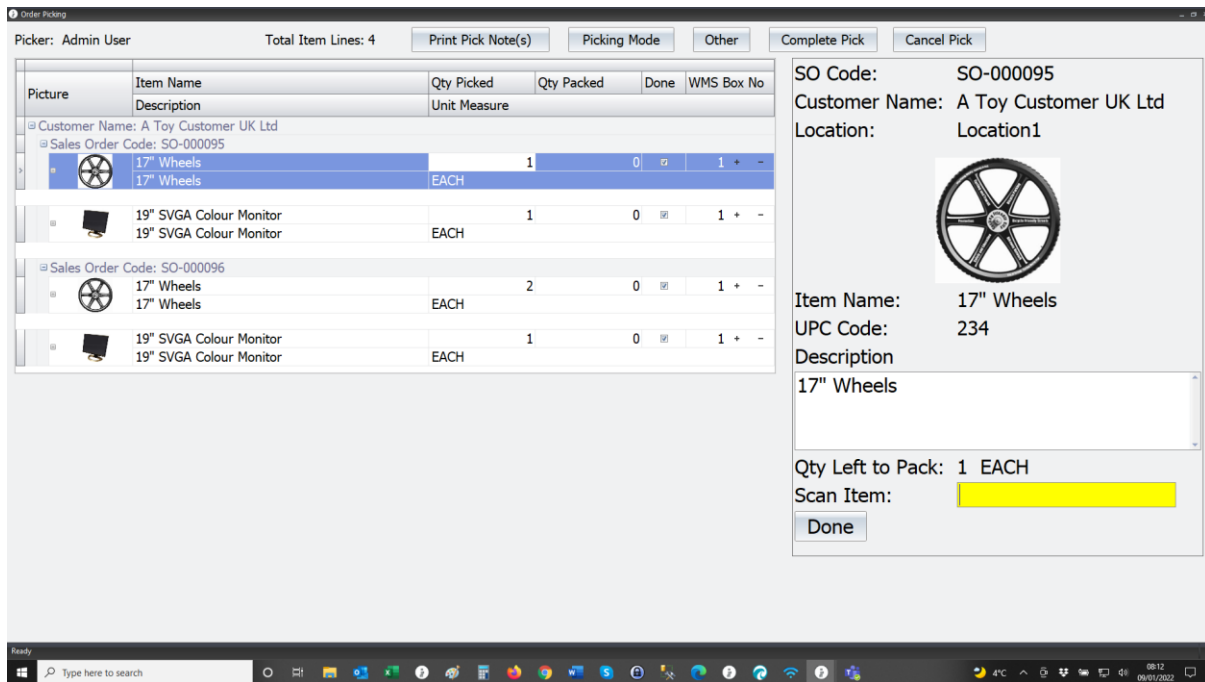
A consolidated pick note combines all the items from all the chosen orders into 1 big pick note by Route/Location.

So you pick from the consolidated pick note, take back to packing area and split the items up using the individual pick notes. Again coming back to the packing station to get delivery note, confirm pick, carrier labels etc.

This enables you to pick in waves. Volume of orders, number of item lines on orders, how much can fit onto a trolley will affect this.



Option 3: Add WMS plugin.



See: <https://www.interprise.co.uk/interprise-suite-knowledge-base/warehouse-management-barcode-picking/>

When using the WMS plugin it allows you to scan confirmation of items as you pick them. You can just ask for next sales order to pick or pick a wave of orders to pick at once. It shows the picker the total Qty of items, Allocated weight in each order to help decide to pick one order or multiple at once. i.e. if you can see that the order is 1 item of 1kg then you know your trolley will take 50kg so could add some more orders to the pick if you wanted to.

This can replace the paper pick note or you may want to print a label or pick/pack note to go with the items anyway for that order on the trolley.

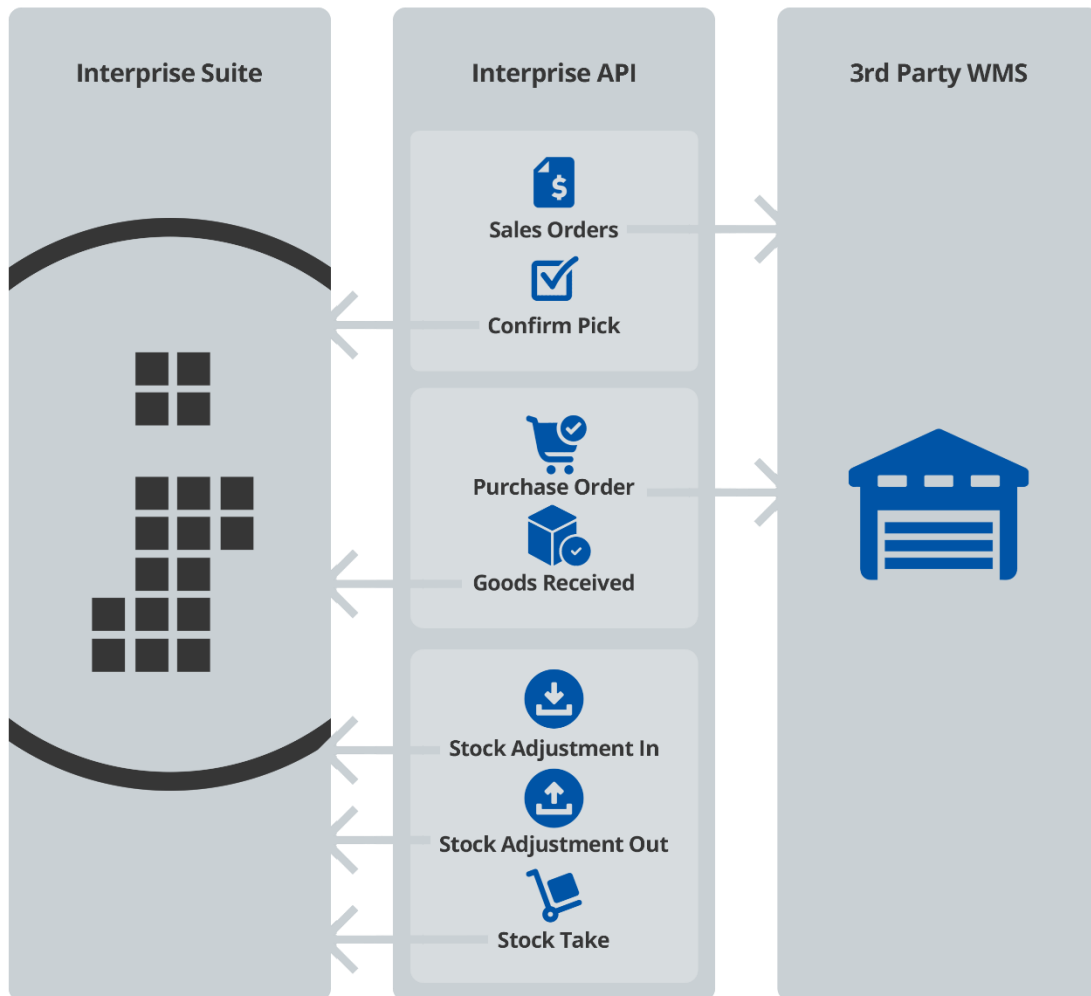
The WMS is designed for a surface device attached to a trolley and a blue tooth hand held scanner.



Option 4: 3rd Party Warehouse Management System

The WMS plugin is a simple plugin designed for simple picking procedures. It is good value for money. If you require a full blow WMS system with hand held devices, RFI etc. then you need to look at a 3rd party WMS package.

We have end points in our API to get sales orders and confirm pick, get POs and do Goods Received. So any WMS could integrate with Interprise using our API as the end points are already there.



If you used a 3rd party WMS then this would keep track of the actual locations of the stock. In Interprise you would still use warehouses but only 1 bin location so we can see the total stock qty of an item and allocate in a warehouse when doing a sales order or deciding what to purchase order.