SCANIT

PARTS ®

PackIt User Guide

Container Organization & Order Packing for Shipping

Part of ScanIt Parts

Inventory Management System

Innovative Programming Systems

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1. PackIt Overview

> **Print History:** Tap the clock icon in the top bar on any screen to see recent print jobs. Shows part number, label type, time, and quantity. Available across all PackIt activities.

1.1 What is PackIt?

PackIt has two jobs in ScanIt Parts:

- **Container Organization** — Store small parts in labeled containers with barcode lookup. Instead of searching through unmarked boxes, scan a part number. PackIt tells you the exact container.
- **Order Packing** — Pack picked orders into containers for shipping. This is part of the PickIt order workflow. The system checks each part as it's scanned to prevent errors.

1.2 When to Use PackIt

PackIt is ideal for:

- **Small parts** that don't need their own bin
- **Low-volume parts** that can share space
- **Overflow stock** when main bins are full
- **Sorting returns** or parts waiting to be processed

> **Tip:** PackIt works alongside your existing bin system. Parts in containers still show up in searches. The system just tells the user to look in a container instead of a bin.

2. Working with Containers

2.1 Creating a Container

1   Select **PackIt** from the scanner main menu

2   Select **New Container**

3   Enter a container name or number (e.g., "BOX-A1", "SHELF-3-BIN-2")

4   A barcode label prints for the new container

5   Attach the label to the container

Naming Tip: Use a naming pattern that makes sense for your area. For example, use shelf and spot numbers (SHELF1-A, SHELF1-B). Or use names that describe what's inside (SMALL-FILTERS, CLIPS-MISC).

2.2 Adding Parts to a Container

1   Select **PackIt** from the scanner main menu

2   Scan the **container barcode label** (or pick the container from the list)

3   Scan each **part barcode** as you place it in the container

4   The system records that the part is now in this container

5 Repeat for each part you want to add

You can store many different part numbers in the same container. The system tracks each one on its own.

2.3 Printing Container Labels

Container labels show a barcode and the container name. You can reprint labels at any time:

1. Select **PackIt** from the menu
2. Select the container
3. Choose **Print Label**

Important: Always attach the label firmly to the container. If a label falls off, you can reprint it. But it causes confusion until someone notices.

3. Finding Parts

3.1 Looking Up a Part

When you need to find a part stored in a container:

1 Use **Part Inquiry** from the scanner main menu

2 Scan the **part barcode** or type the part number

3 The screen shows where the part is. If it's in a container, the container name appears.

4 Go to the container and grab the part

Tip: Part Inquiry works the same for bins and PackIt containers. The system shows the right location no matter where the part is stored.

3.2 Viewing Container Contents

To see everything stored in a container:

1 Select **PackIt** from the scanner main menu

2 Scan the **container barcode label**

3 The screen lists all parts in that container

This is useful for:

- Checking container contents during counts
- Seeing how full a container is before adding more

- Auditing container accuracy

4. Managing Containers

4.1 Removing Parts from a Container

When a part is sold, moved, or put in a regular bin:

1. Select **PackIt**

2. Scan the container

3. Select the part to remove

4. Choose **Remove from Container**

4.2 Removing Parts from Truck Bins

Parts loaded into truck bins for delivery can be removed one at a time. This is useful when:

- A delivery is cancelled

- A part was loaded onto the wrong truck

- A part needs to be pulled back for another order

1 Select **PackIt** from the scanner main menu

2 Scan the **truck bin barcode** or pick the truck bin from the list

3 Select the part to remove from the truck bin contents

4 Choose **Remove from Truck Bin**

The part goes back to its previous status. It can then be assigned to a different truck, repacked, or put back in a container.

> **Tip:** Removing a part from a truck bin does not cancel the order. The part just needs to be re-packed or re-loaded before the order can ship.

4.3 Moving Parts Between Containers

To move parts around:

1. Remove the part from the first container
2. Scan the new container
3. Scan the part into the new container

4.4 Best Practices

Practice	Why It Matters
Use clear container names	Makes it easy to find the right container
Group similar parts together	Filters with filters, clips with clips - it helps
Don't overfill containers	Parts get damaged and are harder to find
Label containers clearly	The barcode label should be easy to see
Audit now and then	Scan containers to make sure contents match the system

5. Order Packing (PickIt Flow)

Overview

In the PickIt workflow, PackIt is the packing step. Picked parts are placed into shipping containers and checked against orders. This makes sure orders arrive complete and correct.

5.1 Packing an Order

1 Select **PackIt** from the PickIt menu on the scanner

2 Scan the **invoice barcode** or pick from the list of picked orders

3 Scan or create a **shipping container** (box, bag, or tote)

4 Scan each **part** as you place it in the container

5 The system **checks** that each part belongs to this order

6 Close the container when it's full or all parts are packed

7 Print **shipping label** and **packing slip**

Multiple Containers per Order

Large orders may need more than one container:

- Close the first container when full
- Create or scan a new container
- Keep packing the rest of the parts
- All containers stay linked to the same order

Oversized Parts

Some parts won't fit in standard containers:

- Create a container marked as "Oversized"
- Scan the part to link it to the order
- Attach a shipping label right to the part

5.2 Checks and Errors

The system checks every part scanned during packing:

Scan Result	What You See	What to Do
Correct part	Green message	Part added to container - keep packing
Wrong part	Red alert	Do NOT pack. Set aside and check.
Already packed	Warning	Part was already scanned into this order
Not on order	Red alert	Part doesn't belong to this invoice

Red alert = wrong part. Never pack a part when you see a red alert. Set it aside and check that it's the right item first.

5.3 Labels and Packing Slips

Closing a Container

1. Tap **Close Container**
2. Pick label options (shipping label, packing slip)
3. Labels print on their own
4. Attach shipping label to outside of container
5. Put packing slip inside (optional)

Packing Slip Contents

- Customer name and address
- Invoice number
- List of parts in this container
- Container number (if there are multiple)

- Total containers in the shipment

> **Packing Tips:**
> - Pack fragile items with padding
> - Place heavy items at the bottom
> - Fill empty space to stop items from shifting
> - Make sure labels are easy to see and secure

5.4 UPS Shipping Integration

For orders shipping via UPS, PackIt connects with UPS to create shipping labels and assign tracking numbers. You don't need to create labels in a separate UPS system.

Creating a UPS Shipping Label

1 Pack the order as normal (see Section 5.1)

2 When closing the container, select **UPS Shipping Label** as the label type

3 The system sends shipment details to UPS and creates a shipping label

4 A **tracking number** is assigned and saved to the order

5 The UPS label prints - attach it to the outside of the container

Tracking Number Visibility

Once a UPS label is created, the tracking number is linked to the order. You can see it in several places:

- **Packing Station** - the Ready to Ship view shows tracking numbers for each packed container
- **Order details** - tracking numbers appear next to container and packing info
- **Reprints** - UPS labels can be reprinted from the Packing Station if needed

Tip: UPS shipping labels only work for orders with a UPS ship-via method. Local delivery orders use standard shipping labels instead.

Important: If the UPS label fails, check the shipping address for errors. The system logs error details to help find UPS API issues. Contact your admin if errors keep happening.

5.5 PackIt Scanner Screen Reference

This section covers each screen on the scanner during order packing. Use it to learn what every button, chip, and card does.

5.5.1 Invoice List

When you open PackIt from the PickIt menu, the invoice list loads first. It shows all orders ready to pack.

What you see:

- **Search bar** at the top. Type an invoice number or customer name to filter the list. The filter updates as you type.
- **Ship-Via chip** in the toolbar. Tap it to filter by shipping method (see 5.5.2).
- **Route chip** in the toolbar. Tap it to filter by delivery route (see 5.5.2).

Invoice cards:

Each card in the list shows:

Element	What It Shows
Invoice number	The order invoice number
Customer name	Who the order is for
Ship via	How the order ships (UPS, FedEx, Will-Call, etc.)
Progress bar	Shows packed vs. total items (e.g., 3 of 10 packed)

Selecting an invoice:

Tap an invoice card to open it. The system locks the invoice on the server so no one else can pack it at the same time. It loads the invoice details, gets the next container, and moves to the part scanning screen.

> **Tip:** The search bar is not case-sensitive. Typing "ups" or "UPS" gives the same results.

Screenshot: Invoice List Screen

PackIt invoice list with search bar, Ship-Via and Route chips in the toolbar, and invoice cards showing progress bars

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5.5.2 Filtering by Ship Via and Route

Use the toolbar chips to narrow down the invoice list. This helps when you only want to pack orders for one shipping method or one route.

Ship-Via filter:

1   Tap the **Ship-Via chip** in the toolbar

2   A modal opens with a list of all shipping methods

3   Use the search bar in the modal to find a method fast

4   Check one or more methods to filter by them

5   The invoice list updates to show only matching orders

Route filter:

1   Tap the **Route chip** in the toolbar

2   A modal opens with a list of all delivery routes

3   Use the search bar to find a route

4   Check one or more routes

5   The invoice list updates to show only orders on those routes

> **Tip:** You can use both filters at the same time. For example, filter by "UPS" ship-via and "Route 1" to see only UPS orders on Route 1.

5.5.3 Scanning Parts on an Invoice

After you select an invoice, the part scanning screen loads. This is where you scan each part into a container.

Screen layout:

- **Search bar** at the top. Filter parts by part number or description.
- **Container chip** below the search bar. Shows the active container name. Tap it to change containers (see 5.5.4).
- **"No Container" toggle** next to the container chip. Turn it on to pack parts without a container (see 5.5.5).

Part cards:

Each part on the invoice shows a card with:

Element	What It Shows
Part number	The DMS part number
Description	Part name from the DMS
Container	Which container the part is assigned to
Old part #	Superseded or alternate part number (if any)
Qty packed / sold	How many are packed vs. how many were ordered
Fully packed status	Shows when all units of this part are packed

Scanning a part:

Scan a part barcode. The system adds one unit to the packed count and assigns it to the active container. The card updates right away.

> **Important:** Make sure the right container is selected before you scan. Parts are assigned to whichever container is active at the time of the scan.

Screenshot: Invoice Detail / Part Scanning Screen

Part scanning screen with search bar, container chip, No Container toggle, and part cards showing qty packed/sold and container assignments

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5.5.4 Container Selection

Tap the container chip to change the active container. A bottom sheet modal slides up with your options.

What you see in the modal:

- A list of all containers already assigned to this invoice
- A search bar to filter by container name
- Radio buttons next to each container (single-select)
- The current active container is pre-selected
- Containers are sorted by name

1 Tap the **container chip** on the scanning screen

2 The container list modal slides up from the bottom

3 Tap a container name to select it (or use the search bar to find it)

4 The modal closes and the chip updates to show the new container

> **Tip:** Switch containers as you fill them. Parts scanned after the switch go into the new container.

Screenshot: Container Selection Modal

Bottom sheet modal showing container list with search bar, radio buttons, and sorted container names

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5.5.5 Packing Without a Container

Some parts do not need a container. Large or oversized items may ship on their own. Use the "No Container" toggle for these.

1   Turn on the **"No Container" toggle** on the scanning screen

2   The container chip changes to show **"No Container"** in a tertiary color

3   Scan the part. It is marked as packed but not assigned to any container.

4   Turn the toggle off when you want to go back to packing into containers

> **Tip:** Use "No Container" for items that ship loose, such as large body panels, bumpers, or other oversized parts that do not fit in a box.

Screenshot: No Container Mode

Scanning screen with "No Container" toggle checked, showing tertiary-colored "No Container" status on the container chip

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5.5.6 Part Detail Modal

Tap any part card to open the Part Detail Modal. Use it to adjust quantities, see part info, or remove a part from its container.

Modal layout:

Section	What It Shows
Header	Part number and pack status (Fully Packed, In Progress, or Not Started)
Part info	Description, container name, old part number
Quantity display	Packed count vs. sold count with status label
Quantity controls	Plus (+) and minus (-) buttons, plus a text input for direct entry
Remove Container button	Red button. Removes the part from its container and resets packed count to 0.

Save / Cancel	Save sends changes to the server. Cancel closes without saving.

Adjusting quantity:

1   Tap a **part card** to open the modal

2   Use the **+ / -** buttons or type a number in the text field

3   Tap **Save**. The server updates the packed count, recalculates the fully packed flag, and refreshes the invoice totals.

Removing from a container:

1   Tap the part card to open the modal

2   Tap the red **Remove Container** button

3   The part is unlinked from the container and its packed count resets to 0

Important: Removing a part from its container resets the packed count to zero. You will need to re-scan or re-enter the quantity after assigning it to a new container.

Screenshot: Part Detail Modal

Modal showing part number header with status, part info fields, quantity controls (+/- and text input), red Remove Container button, and Save/Cancel buttons

6. Packing Station (Web)

Overview

The Packing Station is a web-based view for managers and packers. It shows what needs to be packed and what's ready to ship. Access it from **PickIt > Packing Station** in the web interface.

Needs Packing

Shows all picked orders waiting to be packed. Use this to:

- See what's in the packing queue
- Decide which orders to pack next
- Find orders that have been waiting the longest
- Filter by customer, route, or ship via method

Ready to Ship

Shows orders that are packed and ready for pickup or dispatch. From this view you can:

- Assign packed orders to delivery routes
- Reprint shipping labels or packing slips
- View container contents and packing details
- View UPS tracking numbers for shipped containers
- Reprint UPS shipping labels

> **Tip:** The web Packing Station is for tracking the workflow. The actual packing is done on the scanner using the steps in Chapter 5.

7. Troubleshooting

Problem	Solution
Part not showing container location	Part may not have been scanned into a container. Add it via PackIt.
Container label won't scan	Reprint the label. Check that it isn't torn or covered.
Part shows wrong container	Part was likely moved by hand but not in the system. Update the system.
Container shows parts that aren't there	Parts were taken out by hand but not scanned out. Remove them in the system.

Order Packing Issues

Problem	Solution
Wrong part alert (red)	Do NOT pack. Set the part aside and check. The barcode may not match the order.
Part won't scan into container	Check that the part is on this order. It may already be packed (duplicate scan).
Can't close container	All parts on the order must be scanned first. Check for missing items.
Shipping label won't print	Check printer cable, paper, and labels. Try reprinting from Packing Station.
Order not showing in pack list	Order may not be fully picked yet. Check PickIt Monitor for status.
UPS label won't create	Check the shipping address for errors (missing city, state, or zip). Review the UPS error log. Make sure the order has a UPS ship-via method.
UPS tracking number not showing	The label may not have been created yet. Check Ready to Ship in the Packing Station. If the label failed, re-create it.
Can't remove part from truck bin	Check that the truck has not already been sent out. Parts can only be removed from truck bins before dispatch.

8. Quick Reference

Create a Container

PackIt > New Container > Enter Name > Label Prints > Attach Label

Add Parts to Container

PackIt > Scan Container > Scan Part(s) > Done

Find a Part in a Container

Part Inquiry > Scan Part > See Container Location > Go Get It

View Container Contents

PackIt > Scan Container > View Part List

Remove Part from Container

PackIt > Scan Container > Select Part > Remove

Remove Part from Truck Bin

PackIt > Scan Truck Bin > Select Part > Remove from Truck Bin

Pack an Order (PickIt Flow)

PickIt Menu > PackIt > Scan Invoice > Scan/Create Container > Scan Parts > Close Container > Print Labels

Generate UPS Shipping Label

Close Container > UPS Shipping Label > Label Prints with Tracking Number

Packing Station (Web)

Web: PickIt > Packing Station > Needs Packing (queue) or Ready to Ship (completed + tracking)

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