SCANIT
PARTS ®

PickIt User Guide

Picking, Packing, Dispatch & Delivery

Part of ScanIt Parts

Inventory Management System

Innovative Programming Systems

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1. PickIt Overview

What is PickIt?

PickIt is the order fulfillment module of ScanIt Parts. It handles the full process of filling orders:

- Pick parts from warehouse shelves
- Pack them into containers
- Manage delivery routes
- Track shipments to customers

PickIt cuts errors, boosts speed, and gives you real-time views of all work.

Accessing PickIt

From the Scanner App

The scanner main menu has these PickIt options:

- **Smart Pick** - Guided picking with route planning
- **Pick by Invoice** - Pick one order at a time
- **Pick to Route** - Pick all orders for a delivery route
- **PackIt** - Pack picked orders into containers
- **Dispatch** - Manage delivery route assignments
- **ShipIt** - Process shipments and deliveries

From the Web Interface

Go to **PickIt** in the main menu to access:

- **PickIt Monitor** - Real-time view of all operations
- **Picking** - View and manage pick queues
- **Packing** - Watch packing stations
- **Dispatch** - Route management and driver assignment
- **Shipping** - Track deliveries in progress
- **Reports** - Fulfillment reports and stats

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 PickIt activities — picking, packing, and dispatch.

2. Picking Orders

Overview

Picking means getting parts from bins to fill customer orders. PickIt offers three methods. Each one works best in a different setting.

Picking Methods Comparison

Method	How It Works	Best For	Efficiency
Smart Pick	Builds the best path through the warehouse. Groups picks from nearby bins.	High volume, many orders	Highest
Pick by Invoice	Pick all parts for one customer order at a time	Rush orders, customer waiting	Medium
Pick to Route	Pick all orders going on the same delivery route	Delivery prep, route loading	High

2.1 Smart Pick

Smart Pick is the fastest picking method. The system looks at all pending orders. Then it builds the best path to cut travel time.

How to Use Smart Pick

1. Select **Smart Pick** from the PickIt menu on your scanner

2. Review the pick list. It shows total parts and time estimate.

3. Tap **Start Picking** to begin

4. Follow on-screen directions to the first bin

5 Scan the **bin barcode** to confirm your spot

6 Scan each **part** as you pick it

7 Confirm the **quantity** picked (adjust if needed)

8 Place parts in your pick cart or tote

9 Follow directions to the next bin. Repeat until done.

> **Tip:** Smart Pick groups picks from nearby bins. You may pick for several orders at one spot. The system tracks which parts go where.

Smart Pick Features

- **Best path routing** - Cuts walking distance
- **Multi-order picking** - Pick for many customers in one trip
- **Real-time updates** - New orders can join active picks
- **Progress tracking** - See percent done and items left

Smart Pick Scanner Screen

When you open Smart Pick, you see the process invoice screen. This screen lists all parts across all pending orders, sorted by bin for the fastest path.

Part List View

The main screen shows a list of part cards. Each card has key details at a glance:

- **Part number** and description
- **Bin location** — where the part is stored
- **Customer name** and invoice number
- **Quantity** — shows picked vs. sold (e.g., "0/3")
- **Status color** — tells you the pick state at a glance

Color	Status	Meaning

Green	Fully Picked	All units picked for this line
Blue	In Progress	Some units picked, more to go
Orange	Partial Fill	Marked as partially filled — not all stock was available
Red	Not Found	Part could not be found in the bin
Gray	Not Started	Part has not been picked yet

Screenshot: Smart Pick Part List

Part cards with status colors, bin locations, and qty picked/sold

Search and Filter

Use the search bar at the top to find parts fast. Type a part number or customer name. Results filter as you type.

Zone Selection (Smart Pick Only)

If your dealer has zones set up, you see a zone chip on the screen. Tap it to open the zone selection modal.

- The modal shows a list of all zones
- Use the search bar inside the modal to find zones fast
- Check one or more zones to filter the part list
- The chip shows "X of Y selected" so you know how many zones are active
- Tap **Save** to apply or **Cancel** to go back

Screenshot: Zone Selection Modal

Zone list with checkboxes, search filter, Save/Cancel buttons, and "X of Y selected" count

Note: The zone chip only appears for Smart Pick users. Pick by Invoice and Pick to Route do not show zone filtering on the scanner.

Menu Options

Tap the menu icon to see these options:

- **Show Delayed Invoices** (schedule icon) — Turns on or off. When ON, the list includes invoices marked as delayed (backordered or deferred). OFF by default. This option only shows for Smart Pick users.

- **Show Completed** — Turns on or off. When ON, already-picked parts stay in the list. When OFF, picked parts are hidden so you only see what's left.

Part Detail Modal

Tap any part card to open the detail modal. This bottom sheet gives you full control over the pick.

1 **Status display** — Color-coded badge shows current pick state

2 **Part info** — Description, customer, invoice, and bin locations

3 **Quantity display** — Shows "X/Y" (picked vs. sold)

4 **Quantity controls** — Use +/- buttons or type a number. Cannot go above the sold quantity.

5 **Action buttons** — Partial Fill, Not Found, Print Label, Save, Cancel

Screenshot: Part Detail Modal

Bottom sheet with status badge, quantity controls (+/-), Partial Fill, Not Found, Print Label, Save, and Cancel buttons

Partial Fill (orange button) — Use when you found some but not all of the parts. The button is active when:

- The picked count is not zero
- The picked count is less than the sold count
- The part is not already marked as partial

Not Found (red button) — Use when the part is not in the bin. The button is active when:

- The part is not already marked as not found
- There are still unpicked units

Marking a part as Not Found sets the picked count to 0.

Print Label — Shows only if your scanner has a built-in printer. Prints a label for the picked part.

Print Multiple Labels

When you scan a part with a quantity greater than 1, a dialog appears:

1 The dialog asks: **"Print one label or all X labels?"**

2 Tap **Print One** to print a single label

3 Tap **Print All** to print labels for every unit

4 If you chose Print All, a counter shows "X labels remaining." Each label prints with a 1-second pause between them.

5 Tap **Cancel** at any time to stop printing

Screenshot: Print Multiple Labels Dialog

Dialog with "Print one label or all X labels?" prompt, Print One / Print All buttons, and counter showing labels remaining

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Part Drop Off

If your dealer has drop-off enabled, a **Drop Off** button shows at the bottom of the screen.

1 Pick all parts for the current set of orders

2 Tap **Drop Off** in the bottom bar

3 The system uploads your scans to the server

4 Parts that need drop-off are grouped and sent

5 After drop-off, the invoice list reloads with fresh data

> **Tip:** Drop Off uploads your scans and reloads the list. Use it each time you finish a round of picks and bring parts to the staging area.

Screenshot: Drop Off Button

Bottom bar with Drop Off button visible after picking parts

2.2 Pick by Invoice

Pick by Invoice focuses on one order at a time. Use it when an order must go out right away.

How to Pick by Invoice

1   Select **Pick by Invoice** from the PickIt menu

2   Scan the **invoice barcode** or search by number

3   Review the parts list for this order

4   Go to each bin location shown

5   Scan the bin and part as you pick each item

6   Keep going until all parts are picked

> **When to Use:** Best when a customer is at the counter. Also good for priority orders or rush fills.

Pick by Invoice Scanner Screen

When you open Pick by Invoice, you see the invoice list. This screen shows all pending invoices waiting to be picked.

Invoice List View

Each invoice shows as a card with these details:

- **Invoice number**

- **Customer name**

- **PO #** — purchase order number

- **Ship Via** — how the order ships

- **Age/Overdue badge** — shows how long the order has been waiting

- **Progress bar** — shows items picked vs. total items

The list is paginated. Scroll down to load more invoices.

<div style="border:1px dashed #ccc; padding:2em; text-align:center;">

Screenshot: Invoice List View

Invoice cards showing invoice number, customer, PO#, Ship Via, age badge, and progress bar

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Search and Filter

Use the search bar at the top to find an invoice fast. Type an invoice number or customer name. The list filters as you type.

Zone Selection

Tap the zone chip to open the zone selection modal. This works the same way as in Smart Pick:

- A bottom sheet opens with a list of all zones

- Search to find zones by name

- Use checkboxes to pick one or more zones

- The chip shows "X of Y selected"

- Tap **Save** to apply or **Cancel** to go back

<div style="border:1px dashed #ccc; padding:2em; text-align:center;">

Screenshot: Invoice List with Zone Chip

Invoice list screen showing the zone chip and search bar at the top

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Menu Options

Tap the menu icon for these toggles:

- **Show Delayed Invoices** (schedule icon) — OFF by default. Turn ON to see invoices marked as delayed (backordered or deferred). When OFF, delayed invoices are hidden from the list.

- **Show Completed** — Turn ON to see invoices that are already fully picked. Turn OFF to only see invoices that still need work.

Selecting an Invoice

You have two ways to select an invoice:

- **Tap** an invoice card in the list
- **Scan** an invoice barcode — the scanner reads it and jumps right to that order

When you select an invoice, the system locks it on the server. This prevents other pickers from working the same order at the same time. The app then loads the order details and takes you to the process invoice screen.

> **Important:** Only one picker can work an invoice at a time. If someone else already has it open, you will see a message that the invoice is locked.

Screenshot: Process Invoice Screen

After selecting an invoice — part list with bin locations, quantities, and status colors

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2.3 Pick to Route

Pick to Route collects all orders on a delivery route. Works well for planned deliveries.

How to Pick to Route

1 Select **Pick to Route** from the PickIt menu

2 Select the **delivery route** from the list

3 Review all orders and parts for that route

4 Follow the pick path the system creates

5 Scan bins and parts as you pick

Pick to Route Scanner Screen

The Pick to Route screen works differently from the other methods. Instead of showing a list of invoices or parts, it starts with an input field where you scan or type a part number.

Default Screen

When you first open Pick to Route, you see:

- **Part number input field** at the top — scan a barcode or type a part number here
- **Scanned parts list** below — shows parts you have already scanned in this session
- **Empty state** — when no parts have been scanned yet, the list area is blank with a prompt to start scanning

Screenshot: Pick to Route Default Screen

Part number input field at top, empty scanned parts list below with prompt to start scanning

Scanning a Part

When you scan or type a part number:

1   The scanner sends the part number to the server

2   The server looks up which invoices on this route need that part

3   If the part is on **one invoice**, it is matched right away

4   If the part is on **more than one invoice**, an invoice selection dialog appears

Invoice Selection Dialog

When a scanned part appears on multiple invoices, you must choose which invoice to apply it to.

- A dialog shows all invoices that need this part
- Use the search/filter bar to narrow the list by invoice number or customer name

- Tap an invoice to select it
- Confirm your choice

Screenshot: Invoice Selection Dialog

Dialog listing multiple invoices for the same part, with search/filter bar, invoice details, and confirm button

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> **Tip:** If you know which customer the part is for, type the customer name in the filter to find the right invoice fast.

Part Detail Modal

After a part is matched to an invoice, you can tap it in the scanned parts list to open the detail modal. This modal lets you:

- **Change quantity** — Use +/- buttons or type a number. Max is the sold quantity.
- **Partial Fill** (orange button) — Mark a part as partially filled when you found some but not all units.
- **Not Found** (red button) — Mark a part as not found if it is missing from the bin.
- **Save** or **Cancel** your changes

Screenshot: Pick to Route Part Detail

Part detail modal with quantity controls, Partial Fill and Not Found buttons, after scanning a part on a route

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2.4 Handling Pick Issues

Part Not in Bin

If the part is not where expected:

1. Double-check the bin location
2. Look in nearby bins
3. If not found, tap **Not Found** on the scanner
4. The system flags this for review
5. Move on to the next pick

Not Enough in Stock

If the bin doesn't have enough parts:

1. Pick what's there
2. Enter the actual count picked
3. The shortage is logged on its own
4. The order is marked as partly filled

Damaged Part

- Do not pick damaged parts
- Skip the damaged unit
- Report damage to your supervisor
- Enter a lower count if other good parts are there

Wrong Part in Bin

- Do NOT pick the wrong part
- Report the mix-up right away
- Mark as "Not Found" for the correct part
- Move on to other picks

> **Important:** Never pick a wrong part just to finish. Wrong parts cost time and money to fix.

2.5 Duplicate Pick Safeguards

PickIt stops the same part from being picked twice on one invoice. This prevents over-fills and keeps bin counts correct.

How It Works

- The system checks if the part was already picked for this invoice
- If a duplicate is found, you see a warning on screen
- The duplicate scan is blocked. The part is not added again.
- You can clear the warning and keep picking

Common Scenarios

Scenario	System Behavior

Same part scanned again	Warning shown, scan blocked — already picked
Same part on other invoices	Allowed — the check is per-invoice, not global
Part with quantity > 1	Tracks how many were picked vs. ordered. Only blocks when the full count is met.

Note: Duplicate pick checks work with all picking methods. The check runs on its own — no setup needed.

3. PackIt: Packing Orders

Overview

PackIt is the packing module. Picked parts go into containers and get checked against orders. Good packing means orders arrive complete and undamaged.

3.1 Packing Workflow

1 Select **PackIt** from the menu

2 Scan the **invoice barcode** or pick from the list

3 Review the parts list for this order

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

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

6 System checks that the part belongs to this order

7 Repeat until all parts are packed

8 **Close the container** when done

9 Print **shipping label** and **packing slip**

3.2 Working with Containers

Creating a New Container

1. Select container type (box, bag, tote)

2. Scan the container barcode or let the system make one

3. The container is now linked to the current order

Multiple Containers per Order

Large orders may need more than one container:

- Close the first container when full

- Create or scan a new container

- Pack 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

- Stick a shipping label right on the part

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

3.3 Verification and Labels

Pack Verification

The system checks each scan during packing:

- **Correct part:** Green check, part added to container

- **Wrong part:** Red alert, do not pack

- **Already packed:** Warning that part was already scanned
- **Not on order:** Alert that part doesn't belong to this order

Printing Labels

When packing is done:

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

Packing Slip Contents

- Customer name and address
- Invoice number
- List of parts in this container
- Container number (if more than one)
- Total containers in the shipment

4. Dispatch: Route Management

Overview

Dispatch groups packed orders into delivery routes and assigns drivers. Good dispatch keeps deliveries on time.

4.1 Setting Up Routes

Creating a New Route

1 Go to **PickIt > Dispatch** in the web interface

2 Click **New Route**

3 Enter route name or number

4 Set the planned departure time

5 Select delivery zone or area (optional)

6 Save the route

Route Types

Type	Description
Scheduled Route	Regular daily or weekly routes with set stops
On-Demand Route	Created as needed for special deliveries
Will-Call	Customer pickup at the counter

Shipping	Sent via carrier (UPS, FedEx, etc.)

4.2 Assigning Orders to Routes

Manual Assignment

1. View the list of packed orders waiting for dispatch
2. Select the order(s) to assign
3. Choose the target route from the dropdown
4. Click **Assign to Route**

Auto-Assignment

Orders can be assigned on their own based on:

- Customer's default route
- Delivery zone
- Time window needs

Setting Stop Order

Once orders are on a route, set the best stop order:

1. View the route stop list
2. Click **Optimize Route** for auto sequencing
3. Or drag and drop stops to reorder by hand
4. Think about traffic and customer needs

4.3 Driver Assignment

Assigning a Driver

1 Select the route

2 Click **Assign Driver**

3 Pick a driver from the list

4 Confirm the assignment

Route Status Tracking

Status	Meaning	Color
Pending	Orders assigned but not all packed yet	Yellow
Ready	All orders packed, driver assigned, ready to go	Green
In Progress	Driver is out making deliveries	Blue
Complete	All deliveries on route are done	Gray

Printing Route Manifest

Before the driver leaves, print the route manifest:

1. Select the route
2. Click **Print Manifest**
3. The manifest lists all stops, parts, and customers
4. Driver uses this as backup and for signatures

4.4 Driver-Based Route Assignments

View routes from the driver's side. Assign many routes to one driver.

Assigning Routes to a Driver

1 Go to **PickIt > Dispatch** in the web interface

2 Switch to the **Driver View** tab

3 Select a driver from the list

4 View all routes now assigned to that driver

5 Click **Add Route** to give more routes to this driver

6 Pick routes from the list and confirm

Tip: Useful when a driver handles several short routes in one shift. Driver View makes it easy to balance work across your team.

4.5 Priority Management

Routes support priority levels. This helps the team focus on urgent deliveries first.

Setting Route Priority

1 Go to **PickIt > Dispatch**

2 Select a route

3 Set the **Priority** level (High, Normal, or Low)

4 Save the route. Priority shows in sort order in dispatch and monitor.

How Priority Affects Workflow

- **Picking:** High-priority routes push orders to the top of pick queues
- **Packing:** High-priority orders are flagged at the packing station
- **Dispatch:** Route list sorts by priority first, then by departure time
- **Monitor:** Priority badges show on the PickIt Monitor

Important: Changing priority after picking starts won't reorder an active session. Set priority before picks begin.

4.6 Dispatch Scanner Interface

The dispatch screen on the scanner has two tabs:

Tab	What It Shows
Scans	Scan parts into truck bins. The scanner reads part barcodes and assigns them to the selected truck bin.
Invoices	View and manage invoice assignments. See which invoices are assigned to which routes.

Truck Bin Scanning

1 Select **Dispatch** from the scanner menu

2 Go to the **Scans** tab

3 Select or scan the **truck bin**

4 Scan each **part barcode** to load it into the truck bin

5 The system tracks which parts are in each truck bin

Removing Items from Dispatch

You can remove parts and invoices directly from the dispatch screen:

- **Remove a part from a truck bin:** On the Invoices tab, swipe left on any part in the invoice details to remove it from the truck bin.
- **Remove an invoice from dispatch:** Swipe left on an invoice header to remove the entire invoice from the dispatch.

Important: Removing a part from a truck bin does not cancel the order. The part will need to be re-loaded before the route can be completed.

5. ShipIt: Delivery Operations

Overview

ShipIt guides drivers through delivery. It covers loading, making stops, and getting proof of drop-off.

5.1 Starting a Route

Pre-Departure Checklist

1 Select **ShipIt** from the scanner menu

2 Select your assigned **route** from the list

3 Review the stop list and total containers

4 Tap **Download Manifest** for offline access

Loading the Truck

1 Tap **Start Loading**

2 Scan each **container** as you load it

3 System confirms the container belongs to this route

4 Load last stops first (back of truck) for easy unloading

5 When all loaded, tap **Complete Loading**

Starting the Route

1 Check all containers are loaded (system shows count)

2 Tap **Start Route**

3 GPS tracking begins (if turned on)

4 First stop directions show on screen

Tip: Download the manifest before leaving. You may lose cell signal on the road.

5.2 Making Deliveries

At Each Stop

1 Arrive at the delivery spot

2 Tap **Arrive at Stop** (or GPS detects it)

3 Scan each **container** as you unload it

4 System shows what's in each container

5 Hand off containers to the customer

6 Capture **proof of delivery**:

- Customer signature on screen
- Photo of delivered items

- Name of person receiving

7   Tap **Complete Stop**

8   Head to the next stop

Delivery Exceptions

Situation	Action
Customer not there	Mark as "Attempted" - leave door tag or call
Refused delivery	Mark as "Refused" - note reason, bring items back
Partial delivery	Deliver what's accepted, mark rest as returned
Wrong address	Call dispatch for the right address
Damaged in transit	Photo the damage, offer to return, note in system

5.3 Completing a Route

End of Route

1   After the last delivery, tap **End Route**

2   Review route summary (done, tried, refused)

3   Bring back any items not delivered

4   Scan returned containers back into stock

5   Submit route as complete

Route Completion Report

The system creates a summary showing:

- Total stops tried
- Stops delivered
- Failed attempts
- Refused deliveries
- Items returned
- Total route time
- Mileage (if tracked)

5.4 Removing Parts from Truck Bins

After loading, you may need to pull a part out. PickIt handles this without a full unload and reload.

How to Remove a Part

1 Open **ShipIt** and select the active route

2 Tap **Manage Truck Bins**

3 Select the truck bin with the part to remove

4 Scan the **part barcode** or pick from the list

5 Tap **Remove from Bin**

6 Confirm. The part is unlinked and the stop is updated.

Tip: After removing a part, take it back to the warehouse. Scan it into its bin so stock stays correct.

Common Reasons to Remove Parts

- Customer cancels part of the order after loading
- Wrong part loaded — needs to be swapped
- Part is recalled or damaged after loading
- Part must go on a different route

Important: Removing a part does not cancel the order line. The order shows as short unless the part is re-picked or the order is changed.

Tip: You can also remove parts from truck bins on the Dispatch screen. Swipe left on the part in the Invoices tab. See Section 4.6 for details.

6. PickIt Monitor

Overview

The PickIt Monitor shows real-time status of all work. Track progress, spot delays, and handle issues. The layout has been updated for faster access.

Accessing the Monitor

Go to **PickIt > Monitor** in the web interface.

6.1 Monitor Redesign

The PickIt Monitor has a new look. Easier to view details, take actions, and focus on active work.

Key Improvements

Feature	Description
Modal Dialogs	Click any order row to open details. No need to leave the monitor.
Action Buttons	Quick-action buttons on each row (assign, reassign, view, print)
Enhanced Tooltips	Hover over icons to see timestamps, names, and notes
Hide Idle Toggle	Filter out idle pickers and stations. Focus on active work.
Visual Hierarchy	Clearer headers, color-coded status badges, and better spacing

> **Tip:** Turn on **Hide Idle** during peak hours. Turn off at end of day to see the full picture.

Monitor Sections

Orders Awaiting Pick

- List of orders ready to be picked
- Priority flags
- Order age (time since created)
- Filter by customer, route, or priority

Picking in Progress

- Active pick sessions

- Who is picking what

- Progress bar

- Time estimate to finish

Awaiting Packing

- Picked orders waiting at packing stations

- Time in queue

- Priority flags

Packing in Progress

- Orders being packed now

- Packer name

- Container count

Ready for Dispatch

- Packed orders waiting for a route

- Container spot

- Suggested route

Routes in Progress

- Active delivery routes

- Driver location (if GPS is on)

- Stops done vs. stops left

- ETA to next stop

Using Filters

Filter the monitor view by:

- **Customer** - See all orders for one customer

- **Route** - Focus on one delivery route

- **Priority** - Show only urgent orders

- **Status** - Filter by stage

- **Date range** - Look at past data

- **Hide idle** - Show only active pickers and stations

Alerts

The monitor flags items that need attention:

- **Aging orders** - Orders stuck too long at any stage
- **Pick shortages** - Parts not found during picking
- **Delivery issues** - Failed delivery attempts
- **Route delays** - Routes running behind

6.2 Tablet Dashboard

PickIt has a tablet-friendly dashboard. It gives managers a quick look at picking without sitting at a desk.

Accessing the Tablet Dashboard

Open the PickIt Monitor on a tablet. The system detects the screen size and shows the tablet layout. You can also go to the tablet URL.

Dashboard Stats

The tablet shows three key numbers:

Metric	Description
Total Pad	Total parts on the pick pad (all pending picks)
Total Scanned	Parts that have been scanned and picked so far
Total Difference	Gap between pad and scanned — shows work left

> **Tip:** Mount a tablet near packing or dispatch. Watch picking progress in real time.

6.3 Missing Parts Dashboard

Shows parts not found during picking. When a picker taps "Not Found," the dashboard updates right away. No page refresh needed.

How It Works

- A picker can't find a part in its bin and taps **Not Found**
- The event shows up on the dashboard in real time

- Managers see the missing part appear on screen right away
- Shows part number, expected bin, invoice, picker, and time

Details Shown

Column	Description
Part Number	The part that could not be found
Expected Bin	Where the part should have been
Invoice	The order the part belongs to
Picker	Who reported it missing
Reported At	Time the part was marked as not found

Note: Uses real-time event updates. Alerts show right away — no refresh needed. Helps managers act on stock issues fast.

7. Packing Station (Web)

Overview

The Packing Station is a web view for managers and packers. It shows what needs packing and what is ready to go. Open from **PickIt > Packing Station**.

Needs Packing View

Lists all picked orders waiting to be packed. See what's in the queue.

Details Shown

Column	Description
Invoice #	The order invoice number
Customer	Customer name and account number
Route	Assigned delivery route (if any)
Ship Via	How it ships (route, will-call, carrier)
Parts	Number of parts on the order
Picked By	Who picked the order
Picked At	Time the pick was finished

> **Tip:** Use the search bar to find an order fast. Search by invoice number, customer name, or route.

Ready to Ship View

Shows packed orders ready to ship. All parts scanned and labels printed.

Actions Available

- **Assign to Route** - Add the packed order to a delivery route
- **Print Labels** - Reprint shipping labels or packing slips
- **View Details** - See what's in each container

Workflow: Orders flow from Needs Packing to Ready to Ship as packers finish. The web view is for watching — packing is done on the scanner.

8. Zones

Overview

Zones group warehouse bins by area. Assigning pickers to zones cuts traffic and speeds up picking. Works best in larger warehouses.

8.1 Setting Up Zones

1 Go to **PickIt > Settings > Zones** in the web interface

2 Click **Add Zone**

3 Enter a zone name (e.g., "Aisle A", "Back Wall")

4 Assign bin ranges (e.g., bins A-001 through A-100)

5 Save the zone

Naming Tip: Use names your team knows. "Aisle A" is clearer than "Zone 1."

Managing Zones

- **Edit Zone** - Change name or bin assignments
- **View Bins** - See all bins in a zone
- **Unassigned Bins** - View bins not yet in any zone

Important: Each bin can only be in one zone. Moving a bin to a new zone removes it from the old one.

8.2 Zone-Based Picking

Once zones are set up, picking can be split by zone:

- **Zone filtering** - Pickers see only items in their zone

- **Zone reports** - Track picking activity by zone

- **Multi-zone orders** - Orders that span zones are split. Each picker handles their zone.

Benefits of Zone Picking

Benefit	Description
Less crowding	Pickers stay in their own area
Faster picks	Pickers learn their zone's layout
Parallel work	Many pickers work at once in different zones
Clear ownership	Zone reports show who handles each area

9. PickIt Reports

Overview

PickIt has a full set of reports for tracking work and finding issues. Open from **PickIt > Reports**.

Available Reports

Report	Description	Use Case
Last Picked	Most recent picking across all pickers	Watch today's activity
Parts Not Found	Parts marked as not found during picking	Find stock gaps
Partial Fill	Orders with shortages — not all parts on hand	Track unfilled demand
Invoices	Invoice status and details	Track order finish rates
Sales by Customer	Order volumes and values by customer	Find top customers
Picking History	Past pick data with date range filters	Trend review
Customer Usage	Customer ordering patterns and frequency	Route planning and staffing
Finished Deliveries	Done deliveries with proof of delivery	Delivery checks
Routes	Route stats and delivery times	Improve delivery routes
Zones	Zone activity and picking volume	Balance work across zones
Users/Pickers	Picker speed and accuracy	Staff reviews
Packed Parts	Packing station activity and output	Watch packing speed
Picking Errors	Wrong parts, misscans, and fixes	Quality checks
Picking Stats	Overall metrics and KPIs. Includes piece counts (total items, not just orders).	Manager dashboard, detailed tracking
Lost Sales	Revenue lost from stockouts	Buying decisions

> **Tip:** Most reports support date range filters, Excel export, and printing. Compare results across time periods.

9.1 Route-Based Filtering

All PickIt reports share the same filter system. Filter by route and employee in any report.

Filtering by Route

- Select a **Route** from the filter dropdown at the top
- The report refreshes to show only data for that route
- Route filtering works the same across all PickIt reports

Filtering by Employee

- Select an **Employee** from the dropdown to see one person's work
- Combine with route filter for detail (e.g., "John's picks on Route 5")

Route and Employee in Exports

Route and Employee columns appear in Excel exports too. Easy to sort and pivot outside PickIt.

> **Note:** Route and Employee fields are in all reports and exports. Filters update right away — no reload needed.

10. Settings and Setup

Overview

PickIt settings control how the system works for your store. Open from **PickIt > Settings**.

General Settings

Setting	Description
Auto-assign routes	Assign orders to routes by customer defaults
Require pack check	Force scanning each part during packing
Print packing slips	Print packing slips when containers are closed
GPS tracking	Turn on GPS tracking during deliveries
Proof of delivery	Require signature, photo, or both per stop

Zone Setup

See Chapter 8: Zones for full zone setup steps.

User Management

Manage PickIt users and their roles:

- **Pickers** - Can pick and pack orders on the scanner
- **Drivers** - Can be assigned to delivery routes
- **Managers** - Full access to dispatch, monitor, reports, settings

Route Templates

Set up routes that repeat on a regular basis:

1. Go to **PickIt > Settings > Routes**
2. Click **Add Route Template**
3. Name the route, set the schedule (daily, weekly, etc.)

4. Add default stops and customers

5. Routes are made from templates on scheduled days

Ship Via Options

Set up how orders are shipped:

Ship Via	Use
Route Delivery	Your own drivers on planned routes
Will-Call	Customer picks up at the counter
UPS / FedEx / etc.	Shipped via carrier with carrier labels

10.1 PickIt Alerts

PickIt has an alert system to keep teams in the loop. Users pick which alerts they get in User Settings.

Setting Up Alerts

1 Go to **User Settings > PickIt Alerts**

2 Toggle each alert type on or off for your role

3 Save your settings — changes take effect right away

Alert Types

Alert	Description	Who Should Enable
New Orders Ready to Pick	Alert when new orders enter the pick queue	Pickers, warehouse leads
Aging Orders	Warning when orders sit too long without moving	Managers, dispatchers
Pick Shortages	Alert when a part is not found or short	Managers, inventory team
Delivery Exceptions	Alert for failed drops, refusals, or damage	Dispatchers, managers

Tip: Managers should turn on all alerts. Pickers usually only need "New Orders Ready to Pick." Match alerts to your role.

11. Troubleshooting

Picking Issues

Problem	Solution
No orders to pick	Check filters; make sure orders exist; call dispatch
Bin barcode won't scan	Type bin location by hand; report damaged barcode
Part not in expected bin	Check nearby bins; mark as Not Found; report the issue
Wrong count in bin	Pick what's there; system records the shortage
Scanner loses signal	Move to a better spot; picks are saved locally
Duplicate pick warning	Already picked for this invoice; clear and keep going

Packing Issues

Problem	Solution
Part won't scan into container	Check part is on the order; look for double scan
Wrong part alert	Set part aside; do not pack; find the right part
Can't close container	All parts must be scanned; check for missing items
Label won't print	Check printer link; make sure paper/labels are loaded
Container barcode damaged	Create new container; move items over

Dispatch Issues

Problem	Solution
Can't assign order to route	Check order is packed; make sure route is not closed
Driver not showing up	Create driver account; check driver is active

Route optimization fails	Check all addresses; try setting order by hand
Can't assign many routes to driver	Switch to Driver View tab in Dispatch; check driver is active
Priority not changing pick order	Set priority before picking starts; won't reorder active picks
Can't find dispatch tabs	Update to the latest scanner app version. Dispatch now uses Scans and Invoices tabs.

Delivery Issues

Problem	Solution
GPS not tracking	Check location settings on device; check cell signal
Can't get signature	Use photo proof instead; add a note in comments
Container not found	Check container is on this route; call dispatch
Customer refuses delivery	Mark as refused; note reason; bring items back
Can't remove part from truck bin	Route must not be started yet; use Manage Truck Bins

Getting Help

1. Write down the exact error or issue
2. Note what you were doing when it happened
3. Tell your supervisor or dispatch
4. For system issues, contact IT support

12. Quick Reference

Picking Quick Steps

Method	Steps
Smart Pick	Menu > Smart Pick > Start > Follow path > Scan bin > Scan part > Confirm qty > Repeat
By Invoice	Menu > Pick by Invoice > Scan invoice > Go to bins > Scan & pick > Complete
To Route	Menu > Pick to Route > Select route > Follow path > Scan & pick > Complete

Packing Quick Steps

Menu > PackIt > Scan invoice > Scan/create container > Scan parts into container > Close container > Print labels

Dispatch Quick Steps

Web: PickIt > Dispatch > Create/select route > Assign orders > Assign driver > Print manifest

Delivery Quick Steps

Menu > ShipIt > Select route > Load containers > Start route > At each stop: Scan containers > Get signature > Complete stop > End route

Status Colors

Color	Meaning
Yellow	Pending / Waiting
Green	Ready / Complete / Success
Blue	In Progress
Red	Error / Problem / Alert
Gray	Complete / Closed / Inactive

Key Terms

Term	Definition
Container	Box, bag, or tote used to ship parts
Dispatch	Assigning orders to delivery routes
Manifest	List of all stops and items on a route
Pick	Getting parts from bins for orders
Route	Delivery path with many stops
Smart Pick	Best-path picking that cuts walking
Stop	One delivery spot on a route
Tablet Dashboard	Tablet-friendly monitor view with picking stats
Truck Bin	Spot on the truck where containers/parts are loaded

PickIt

Order Fulfillment Guide