

## Before You Start

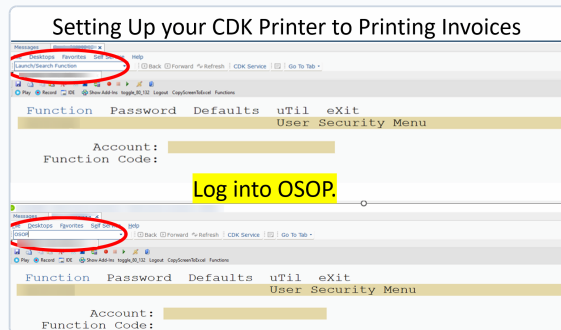
- **PickIt is CDK-only.** It is available on the CDK DMS platform.
- **IPS turns PickIt on for your store.** It is not a self-serve toggle — contact IPS Support to activate it.
- Setup has two sides: **CDK** (print pick tickets) and **ScanIt** (PickIt settings).
- Picking only starts once invoices print pick tickets.

**Do this in order:** Set up your ScanIt PickIt settings *first*. Once pick tickets start printing, the PickIt queue fills up. If go-live is delayed, you can Archive the open pick tickets (Step 8) and start fresh.

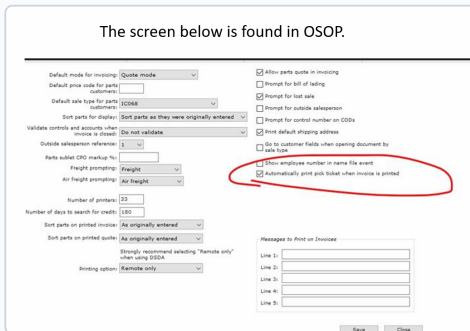
## Step 1 — CDK Pick-Ticket Printing

PickIt only activates when CDK is set to print pick tickets.

- 1 In CDK, open **Modify Invoice Setups**
- 2 Find "**Automatically print pick ticket when invoice is printed**"
- 3 The default is **N**. Change it to **Y**.
- 4 Set up a printer for the pick ticket



Open the Launch/Search box and log into OSOP



In Modify Invoice Setups, set "Automatically print pick ticket when invoice is printed" to Y

**Tip:** Choose a printer that doesn't conflict with your main printers. A "dummy" pick-ticket printer (one that doesn't actually print paper) works fine.

**Need help with CDK?** Contact IPS Support and we'll help set up the pick-ticket printer.

## Step 2 — Open PickIt Settings

- 1 Log in to your ScanIt Parts dashboard
- 2 Open **Pickl** from the menu
- 3 Click the **gear (Settings)** icon
- 4 Start with **General**

### Step 3 — Choose a Picking Mode

Mode	Best For
<b>SmartPick</b>	Larger stores. Zone picking. Several pickers work the same invoices at once.
<b>Pick by Invoice</b>	Smaller stores with limited staff. One picker pulls the whole invoice.

On the **General** screen, turn **SmartPick ON** for zone picking, or **OFF** for Pick by Invoice.

### Step 4 — Zones (SmartPick only)

Pick by Invoice needs no zones. SmartPick needs zones.

- 1 Go to **Pickl > Settings > Zones**
- 2 Click **Add Zone** and name it
- 3 Add bins as a **range** (first–last bin), a **comma list** (non-sequential bins), or a **begins-with** rule
- 4 Assign a picker to **every** zone

**Tip:** If you type a long bin list, the page can convert it to a range or begins-with rule with one click.

### Step 5 — Add Users & Pickers

- Add **only your store's employees**.
- Each picker needs an **active login**.
- **Don't share logins** — this tracks each person's work.
- Include the picking options: **Partial Fill** and **Parts Not Found**.
- Pick by Invoice: no need to assign pickers to zones.

**High turnover?** Plan to review your picker list often.

### Step 6 — Control What Gets Picked

**AutoPick = NOT sent to the scanners** (handled manually). Use these screens to keep the right invoices off the scanner.

Screen	What It Does
<b>Ignored Sale Types</b>	Skip sale types you don't pick (e.g. repair orders, internal). Search the type and Add it.
<b>Ship Via</b> <i>(recommended)</i>	Toggle <b>AutoPick</b> on ship vias you don't want on scanners (e.g. front/back counter). The rest are picked. Set the others to Normal.
<b>Customers</b>	Set priority (Highest–Lowest), or <b>Hide From Invoices</b> to keep a customer off the scanners.
<b>Bins</b>	Toggle a bin to <b>AutoPick</b> so it won't show on the scanner.
<b>Ignored Parts</b>	Skip part numbers like FREIGHT, NPN, bulk oil, coolant. Search the part and Add it.

**Ship Via is the easiest control.** It has the biggest impact on what reaches the scanners. Priority ranking is optional — most stores skip it.

### Step 7 — Pick Alerts

Get live alerts for Partial Fill and Parts Not Found.

- 1 Click your initials > **User Settings**
- 2 Scroll to **Alerts** (or PickIt Alerts)
- 3 Toggle the alerts you want ON

**Profile must be complete:** Alerts only work if your profile has an **email and phone number**. Make sure managers set theirs up too.

## Step 8 — Go Live

- 1 Go to **PickIt > Settings > Archive Invoices**
- 2 **Archive** any outstanding pick tickets to start fresh
- 3 As invoices print pick tickets, the pick queue fills
- 4 Start picking with your scanners

**Remember:** PickIt only works once you invoice a pick ticket. Recommended upkeep (monthly or quarterly): review **Bins** and **Customers**.

## Getting Help

- **Phone:** 810-695-9332
- **Email:** support@scanitparts.com
- See the full **PickIt Guide** for detailed instructions

Updated June 2026 | PickIt Setup Quick Reference | See the full PickIt Guide for detailed instructions

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