



Batch Picking

Product Development - 2025-06-11 - Miscellaneous

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Overview

Inventory Manager's Batch Picking functionality makes it possible to group up sales orders so that they can be picked together in one trip through the warehouse.

Sales orders can be grouped into batch picks ahead of time by the warehouse manager, or they can be grouped on-the-fly by pickers on the mobile app. The new Batch Picking module on the mobile app gives pickers the ability to see all items needed for those orders with grouped quantities so they can easily pick everything together. Choose between modes that make Batch Picking a staging activity that is followed by a separate Picking step, or items can automatically fulfill to orders as part of this step, or the picker must select a specific order and line for each fulfillment.

Batch Picking supports [Picking Assignments](#) so that batch picks can be assigned to specific pickers or picking groups, streamlining warehouse fulfillment operations.

Batch Picking also supports [Directed Picking](#) so that batch picks can be recommended in a priority sequence based on their sales orders, serial/lot numbers can be recommended in FIFO/FEFO order, and the picker can be directed to each bin so they travel in one smooth flow through the warehouse. Instead of handing out paper pick tickets to pickers, just group up orders, assign them to pickers, and let Directed Picking guide them through the batch picking process on the mobile app.

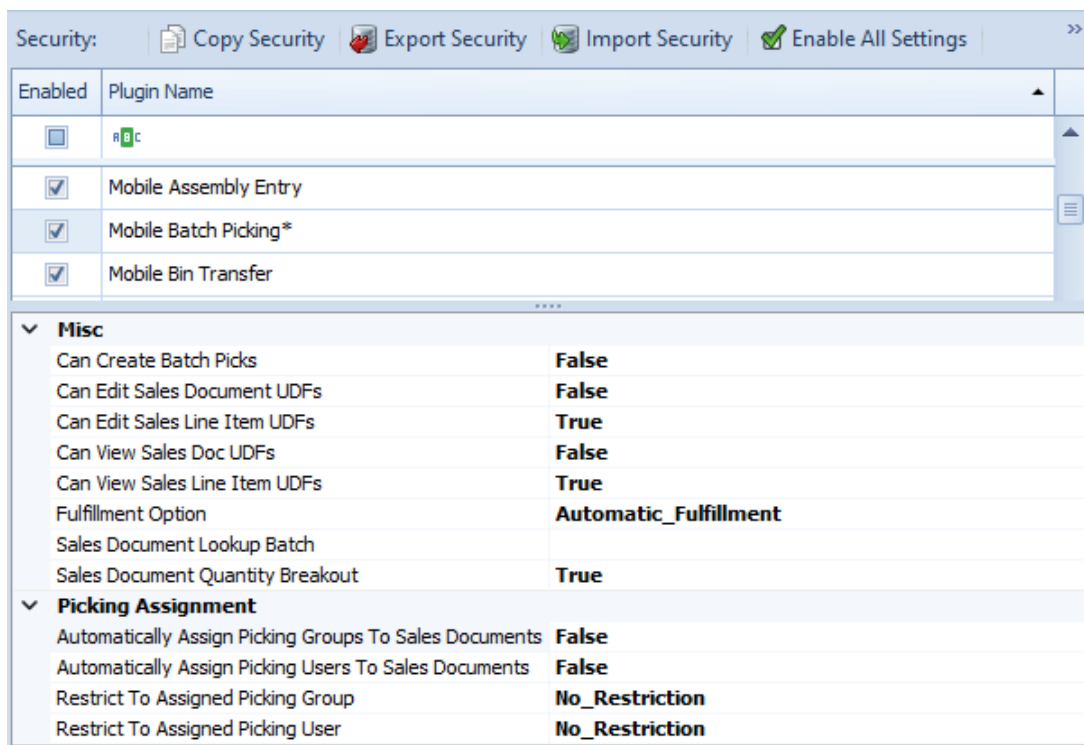
Batch Picking is available as of Inventory Manager Version 5.14.0.

Batch Picking Configuration

The Batch Picking module on the mobile app is controlled by securities and settings that closely mirror the standard Picking module. It also offers special configuration that determines whether Batch Picking is a staging activity, or auto-applies fulfillments, or requires the picker to specify an order and line for fulfillment. These options can be used to tailor this module to your business needs.

Securities

Securities are configured in the Security Editor and provide feature access and options for the configured user group.



Enabled	Plugin Name
<input type="checkbox"/>	r1c
<input checked="" type="checkbox"/>	Mobile Assembly Entry
<input checked="" type="checkbox"/>	Mobile Batch Picking*
<input checked="" type="checkbox"/>	Mobile Bin Transfer

Misc	
Can Create Batch Picks	False
Can Edit Sales Document UDFs	False
Can Edit Sales Line Item UDFs	True
Can View Sales Doc UDFs	False
Can View Sales Line Item UDFs	True
Fulfillment Option	Automatic_Fulfillment
Sales Document Lookup Batch	True
Sales Document Quantity Breakout	True

Picking Assignment	
Automatically Assign Picking Groups To Sales Documents	False
Automatically Assign Picking Users To Sales Documents	False
Restrict To Assigned Picking Group	No_Restriction
Restrict To Assigned Picking User	No_Restriction

Misc

Can Create Batch Picks - When set to true, users will be able to see documents that are not currently assigned to batch picks in the Sales Docs lookup, and they will be able to create batch picks for those documents. Defaults to 'False'.

Can Edit Sales Document UDFs - Determines whether or not User Defined Fields for Sales Documents can be changed on the device. Defaults to 'False'.

Can Edit Sales Line Item UDFs - Determines whether or not User Defined Fields for Sales Line Items can be changed on the device. Defaults to 'False'.

Can View Sales Doc UDFs - Determines whether or not User Defined Fields for Sales Documents are visible on the device. Defaults to 'False'.

Can View Sales Line Item UDFs - Determines whether or not User Defined Fields for Sales Line Items are visible on the device. Defaults to 'False'.

Fulfillment Option - Determines how Batch Picking applies fulfillments to sales documents on submission. No Fulfillment will not create any fulfillments. Automatic Fulfillment will automatically apply fulfillments to the documents in Sales Doc Num order. Manual Fulfillment will require the user to select a specific document and line for each submission. Defaults to 'No Fulfillment'.

Sales Document Lookup Batch - In the Batch Picking screen, the Sales Docs lookup will display only the sales orders matching the specified workflow batch. This overrides the Batch Picking Lookup Batch setting for this user group. If the security and setting are both left blank, the lookup will not filter by workflow batch. Defaults to nothing.

Sales Document Quantity Breakout - When set to true, the item quantities needed for each sales document will be listed in the Total Qty To Pick cell once an item has been selected. Defaults to 'True'.

Picking Assignment

Automatically Assign Picking Groups To Sales Documents - If enabled, when a user loads a Batch Pick ID or submits the first submission for a new Batch Pick ID in the Mobile Batch Picking module, their configured picking group name will be automatically added to the Picking Group field for all sales documents in that Batch Pick ID. Defaults to 'False'.

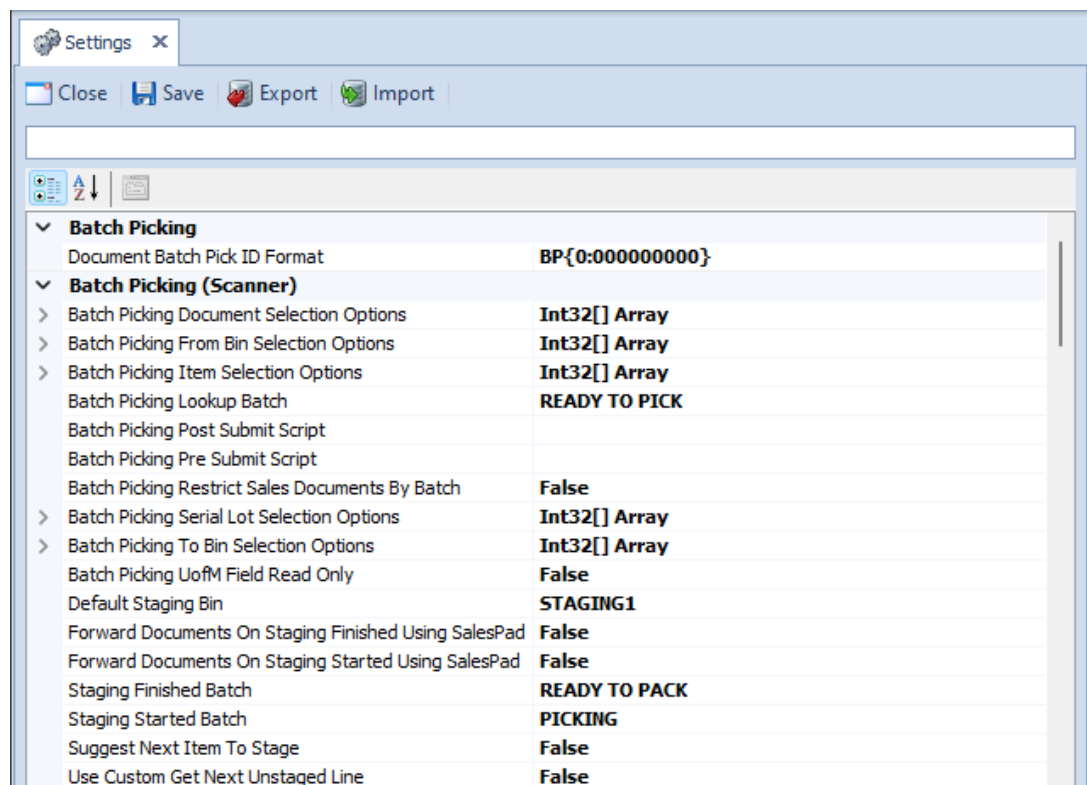
Automatically Assign Picking Users To Sales Documents - If enabled, when a user loads a Batch Pick ID or submits the first submission for a new Batch Pick ID in the Mobile Batch Picking module, their username will be automatically added to the Picking User field for all sales documents in that Batch Pick ID. Defaults to 'False'.

Restrict To Assigned Picking Group - Only Assigned User restricts users to only see sales documents in the Sales Docs lookup if their user group is assigned as a Picking Group for them, and they can only add those sales documents to a Batch Pick ID for picking. Only Assigned User And Unassigned Docs still restricts users to sales documents that are assigned to their group but also includes sales documents that are not assigned to any Picking Group. No Restriction provides access to all applicable sales documents regardless of Picking Group assignment. Defaults to 'No Restriction'.

Restrict To Assigned Picking User - Only Assigned User restricts users to only see sales documents in the Sales Docs lookup if they are assigned as a Picking User for them, and they can only add those sales documents to a Batch Pick ID for picking. Only Assigned User And Unassigned Docs still restricts users to sales documents that are assigned to them but also includes sales documents that are not assigned to any Picking User. No Restriction provides access to all applicable sales documents regardless of Picking User assignment. Defaults to 'No Restriction'.

Settings

Settings are configured in the Settings screen and are global controls for various app features.



Batch Picking

Document Batch Pick ID Format - Defines the C# string format to use when generating batch pick IDs for groups of sales documents that will be picked together. An example would be BP{0:000000000}, where "BP" is the prefix, "{0}" is the batch pick ID, and ":000000000" pads the ID with leading 0s until it is 9 characters long. Defaults to 'BP{0:000000000}'.

Batch Picking (Scanner)

Batch Picking Document Selection Options - Determines which ways users can enter values into the Sales Docs field in Batch Picking. If nothing is selected, then the field will be read only. Defaults to 'Lookup, Scan, and Type'.

Batch Picking From Bin Selection Options - Determines which ways users can enter values into the From Bin field in Batch Picking. If nothing is selected, then the field will be read only. Defaults to 'Lookup, Scan, and Type'.

Batch Picking Item Selection Options - Determines which ways users can enter values into the Item Number field in Batch Picking. If nothing is selected, then the field will be read only. Defaults to 'Lookup, Scan, and Type'.

Batch Picking Lookup Batch - In the Batch Picking screen, the Sales Docs lookup will display only the sales orders matching the specified workflow batch. Mobile Batch Picking's Sales Document Lookup Batch security will override this setting if it has a value for the user's security group. If the security and setting are both left blank, the lookup will not filter by workflow batch. Defaults to nothing.

Batch Picking Post Submit Script - Batch Picking C# script that executes when the submit button is tapped after the transaction is saved. Defaults to nothing.

Batch Picking Pre Submit Script - Batch Picking C# script that executes when the submit button is tapped before the transaction is saved. Defaults to nothing.

Batch Picking Restrict Sales Documents By Batch - If enabled, the Sales Docs field for the Batch Picking screen will only allow documents which are in the batches listed in the 'Batch Picking Lookup Batch' setting. Defaults to 'False'.

Batch Picking Serial Lot Selection Options - Determines which ways users can enter values into the Serial Num and Lot Num fields in Batch Picking. If nothing is selected, then the fields will be read only. Defaults to 'Lookup, Scan, and Type'.

Batch Picking to Bin Selection Options - Determines which ways users can enter values into the To Bin field in Batch Picking. If nothing is selected, then the field will be read only. Defaults to 'Lookup, Scan, and Type'.

Batch Picking UofM Field Read Only - If set to 'True', the Unit of Measure field on the Batch Picking screen will be read only. Defaults to 'False'.

Default Staging Bin - The default value for the To Bin field in Batch Picking. Defaults to nothing.

Forward Documents On Staging Finished Using SalesPad - If set to 'True', Inventory Manager will attempt to forward all sales documents in a group when all documents in the group are fully staged. This setting requires

SalesPad Remote Library to be running and accessible by Inventory Manager. Defaults to 'False'.

Forward Documents On Staging Started Using SalesPad - If set to 'True', Inventory Manager will attempt to forward all sales documents in a group after the first submission for the group. This setting requires SalesPad Remote Library to be running and accessible by Inventory Manager. Defaults to 'False'.

Staging Finished Batch - The workflow queue which Inventory Manager will send all sales documents in a group when all documents in the group are fully staged. Defaults to nothing.

Staging Started Batch - The workflow queue which Inventory Manager will send all sales documents in a group after the first submission for the group. Defaults to nothing.

Suggest Next Item To Stage - If set to 'True', the app will suggest the next item to stage. Cavallo recommends turning off this setting when auto submit is enabled. Defaults to 'False'.

Use Custom Get Next Unstaged Line - If set to 'True', Inventory Manager will use the custom stored procedure 'dccpGetNextUnstagedLineItem' to determine the next item number to stage. When this setting is set to 'True', the setting 'Suggest Next Item To Stage' is overridden. Defaults to 'False'.

Other Settings

The following General Options and Picking (Scanner) settings are also leveraged by Batch Picking to keep general picking behavior consistent between Batch Picking and standard Picking:

General Options

Allow Bin Creation - Allows users to create bins automatically if the bin entered does not exist yet in the system. For Batch Picking, this setting applies to the To Bin. Defaults to 'False'.

Sales Document Lookup Additional Field - When a sales document field is selected, that field will be added to the sales document lookup screen. Defaults to nothing.

Sales Document Lookup Additional Field Character Limit - This setting determines how many characters to display for the value of the field specified in the Sales Document Lookup Additional Field setting. Set this to '0' for no limit. Defaults to '0'.

Use Alternate Item Description - If True, the GetAltItemDescription stored

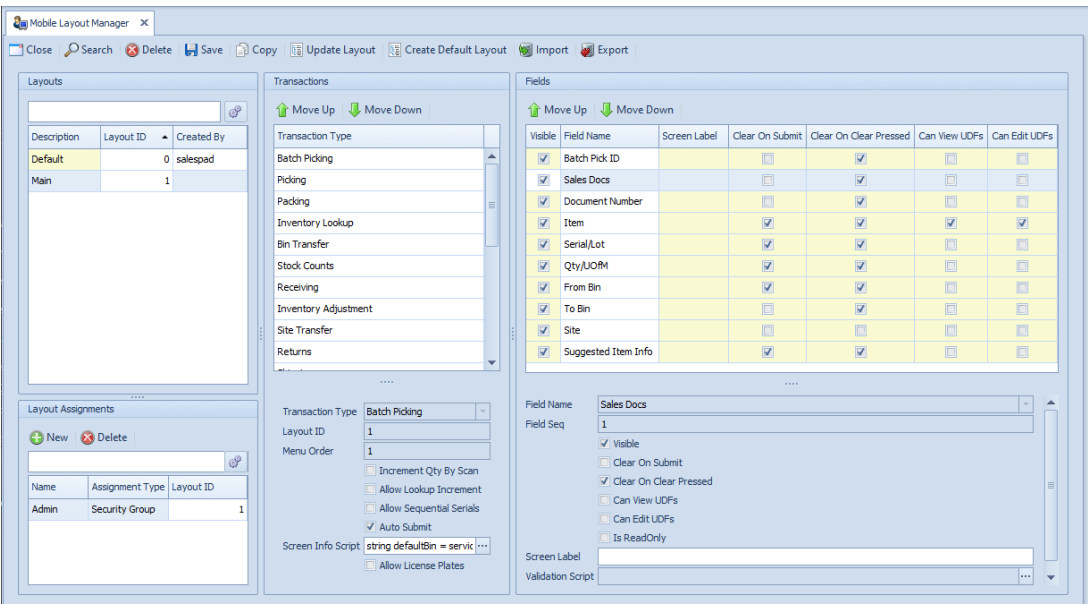
procedure will be used to retrieve alternate Item Descriptions for loaded items. Defaults to 'False'.

Picking (Scanner)

Can Pick Service Items - If set to 'True', users can pick service type items, such as misc. charges, services, and flat fee items. Defaults to 'False'.

Mobile Layout Manager

The Mobile Layout Manager provides the ability to control where Batch Picking appears in the transaction list in the app, in which sequence its fields appear, and certain extended features like user defined field visibility and editing.



Layouts are managed in the left-most panel and can be assigned to specific users and/or user groups to control what they see in the mobile app. Each layout can have its own configured transaction list, seen in the middle panel, which controls the sequence in which those transactions appear in the app module selection screen. Frequently-used modules can be moved to the top of the list for easier use. Each transaction type can be configured to show its fields in a specific sequence for smooth data entry. For general information on Mobile Layout Manager configuration, refer to [this documentation](#).

Batch Picking supports Auto Submit, Increment Qty By Scan, and Allow Lookup Increment. It does not currently support license plates or sequential serials. The Screen Info Script defaults to showing basic suggestions for a batch pick and can be adjusted as needed to show important information to the picker in the Suggested Item Info cell. Note that Directed Picking will automatically prepend picking recommendations to the Suggested Item Info cell if configured to do so.

All of the fields in Batch Picking are available in the right-most panel. Their order can be rearranged, they can be made not visible so that they are hidden from the pickers, and they can be set for whether they automatically clear when the picker submits a transaction or taps the Clear button. User defined field visibility and editability is controlled here also, and should align with the Can View and Can Edit securities for the Mobile Batch Picking module.

Common use cases for making fields not visible include:

- When the Default Staging Bin is set, and there is no need for pickers to see or override that field, then the To Bin field can be hidden
- When pickers should not be allowed to create batch picks on the fly, and they also do not need to see the list of sales documents that are in a batch pick, then the Sales Docs field can be hidden

Batch Picking Assignment

Inventory Manager console provides a Batch Picking Assignment screen where sales orders can be grouped into batch picks. Search functionality allows finding orders that are ready for fulfillment, and targeting specific warehouses and customers. Special controls make it simple to group similar orders by specifying that they must share a customer, shipping method, and a certain number of items. Easily ensure that batch picks contain enough orders, but not so many orders that they are unmanageable. Alternatively, manually group orders as desired without concern for similarity and order count - time is still saved by picking many orders in one flow even if they do not have matching items. This screen must be enabled per user group.

Assigning Batch Picks

The Batch Picking Assignment screen is used for assigning sales orders to batch picks ahead of time. Warehouse managers can find orders based on their assigned customer, warehouse, sales batch / workflow queue, doc date, and required ship date. It is also possible to find orders with certain numbers of unique items, which can help with targeting smaller orders to keep batch picking from getting too complicated. Existing batch picks can be found by searching for the batch pick ID, which is helpful when the warehouse manager needs to add or remove orders for an existing batch pick. Triggering the search populates the grid in the lower section of the screen.

Batch Picking Assignment
Close Search Clear

Search Fields

Sales Doc Num: Sales Batch: From Doc Date: From Req Ship Date: Min Unique Items:

Customer Num: Batch Pick ID: To Doc Date: To Req Ship Date: Max Unique Items:

Warehouse:

Bulk Assignment Options

☐ Must Share All Items Min Shared Items:

☐ Must Share Customer Min Documents:

☐ Must Share Shipping Method Max Documents:

☐ Selected Documents Only Assign All

Sales Documents

Assign Batch Pick Unassign Batch Pick Send To Sales Batch

Sales Doc ID	Sales Doc Num	Sales Batch	Customer Name	Shipping Method	Warehouse Code	Doc Date	Req Ship Date	Total Lines	Total Qty	Total Unique Items	Batch Pick ID
BKORD	ORD 1070	NEW ORDER	Aaron Fitz Electrical	LOCAL DELIVERY	WAREHOUSE	12/20/2023	12/20/2023	1	1	1	BP000000021
WMSORDER	ORD 1075.1	NEXT SOHO	Aaron Fitz Electrical	LOCAL DELIVERY	WC1	5/8/2024	5/8/2024	1	10	1	BP000000021
WMSORDER	ORD 1075.2	NEXT SOHO	Aaron Fitz Electrical	LOCAL DELIVERY	WC2	5/8/2024	5/8/2024	1	3	1	BP000000021
WMSORDER	ORD 1076	NEXT SOHO	Aaron Fitz Electrical	LOCAL DELIVERY	WC1	5/15/2024	5/15/2024	1	10	1	BP000000021
WMSORDER	ORD 1071	MB SHIPPED	Aaron Fitz Electrical	LOCAL DELIVERY	WAREHOUSE	3/21/2024	3/21/2024	2	10	2	BP000000021
WMSORDER	ORD 1072	MB SHIPPED	Aaron Fitz Electrical	LOCAL DELIVERY	WAREHOUSE	3/29/2024	3/29/2024	2	5	2	BP000000021
WMSORDER	ORD 1073	MB SHIPPED	Aaron Fitz Electrical	LOCAL DELIVERY	WAREHOUSE	3/29/2024	3/29/2024	2	6	2	BP000000021
WMSORDER	ORD 1074	MB SHIPPED	Aaron Fitz Electrical	LOCAL DELIVERY	WAREHOUSE	3/29/2024	3/29/2024	2	6	2	BP000000021

The grid shows all orders that match the search criteria, and standard grid sorting and filtering capabilities can be used to further tailor the results. All sales order header fields can be made visible to help with deciding which orders should be grouped together; use the Column Chooser to add and rearrange columns as needed. Several special calculated columns are also visible by default. Total Lines shows how many total sales lines are on the order, Total Qty shows how much total quantity in base UoFm is on the order, and Total Unique Items shows how many unique items are on the order. The Batch Pick ID column shows the assigned batch pick ID for each order.

One or more orders can be selected in the grid, and then the Assign Batch Pick button can be used to assign them to a batch pick together. This button ignores any specified similarity criteria, like Must Share Customer, so it gives the manager full control over creating batch picks. The only requirement is that all orders must share the same warehouse to be assigned to the same batch pick.

The Batch Pick ID column for the selected orders will automatically populate with the next available batch pick ID value, which is how the system groups the orders together. The format of the batch pick ID can be customized with the *Document Batch Pick ID Format* setting, which is used for batch picks created on this server screen as well as on the mobile app.

The Bulk Assignment Options section at the top right of the screen provides automatic processing options to group orders into batch picks based on similarity criteria. The Selected Documents Only checkbox controls whether the Assign All button processes only the selected orders in the grid, or all orders in the grid. Orders will be combined into batch picks based on the sequence in which they appear in the grid. The checkboxes for Must Share Customer, Must Share Shipping Method, and Must Share All Items control whether orders must match on those criteria to be grouped into the same batch pick. Min Shared Items controls

whether orders must have X items in common in order to be grouped together. Min Documents and Max Documents can be used to ensure that batch picks have enough orders to be worth combining, and not so many orders that they are unmanageable. These factors, especially when combined with Min Documents, can make it so that some orders do not actually get grouped into batch picks by this process. Those that are grouped will have their Batch Pick ID updated automatically to reflect their groupings.

If an order needs to be added to an existing batch pick, its Batch Pick ID column can be updated manually to match an existing batch pick. If an order needs to be removed from an existing batch pick, then its Batch Pick ID can be cleared. If many orders need to be ungrouped, then it is easiest to select them all and use the Unassign Batch Pick button, which clears the Batch Pick ID for all of them at once.

Mobile Batch Picking

Overview

The mobile app provides a new Batch Picking module where pickers can pick items for a group of orders at once. Pickers can find and load existing batch picks that were grouped by a warehouse manager on the server. Alternatively, they can find sales orders that are ready for picking and choose to group them into a batch pick on the fly. Once a batch pick is grouped, this module provides consolidated item visibility for all of those orders, so that the picker can easily pull all needed item quantities together.

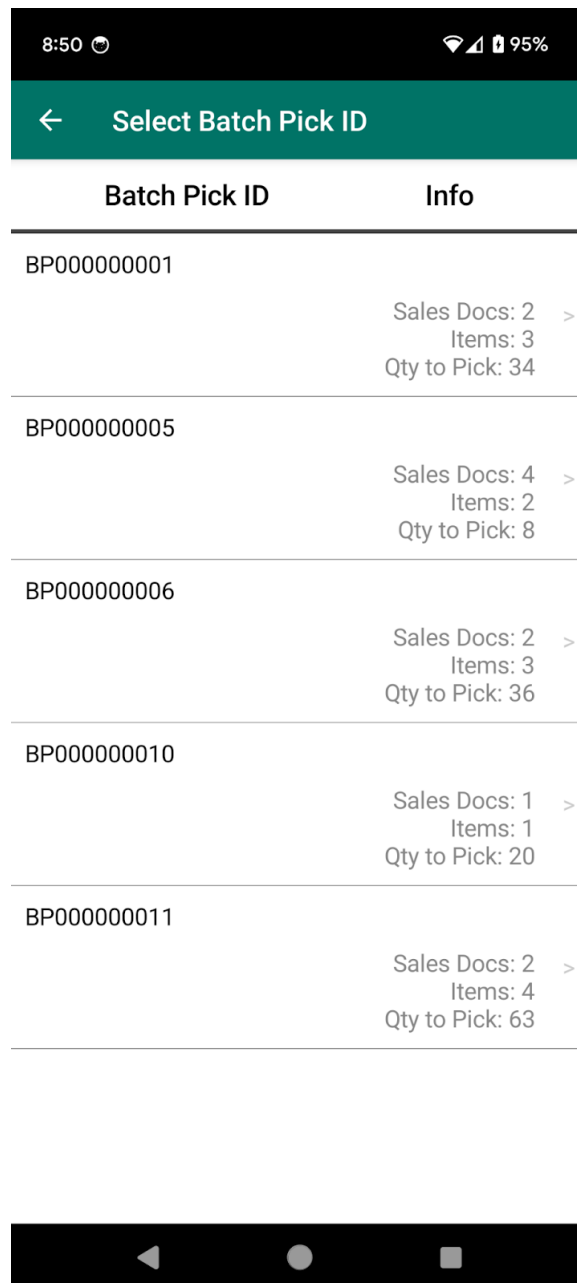
The screenshot shows a mobile application interface for 'Batch Picking'. At the top, there is a status bar with the time 8:47 and a battery level of 94%. Below the status bar is a green header with a back arrow, the title 'Batch Picking', and a 'SUBMIT' button. A blue link 'Clear Fields' is positioned above the input fields. The form consists of several rows, each with a label and a corresponding input field or value. The 'Batch Pick ID' field is empty. The 'Sales Docs' field is empty, with a '0' displayed to its right. The 'Item Num' field is empty, with an information icon to its right. The 'Qty' field contains '0', with '-' and '+' buttons to its right. Below these are rows for 'Qty to Pick' (0) and 'Total Qty to Pick' (0). The 'UofM' field is empty. The 'From Bin' field is empty. The 'To Bin' field contains 'STAGING1'. The 'Site ID' field contains 'WAREHOUSE'. At the bottom, there is a 'Suggested Item' section with an empty input field. The interface is designed for a mobile device, with a black navigation bar at the very bottom.

Batch Pick ID		>
Sales Docs		0 >
Item Num		i >
Qty	0	- +
Qty to Pick		0
Total Qty to Pick		0
UofM		>
From Bin		>
To Bin	STAGING1	>
Site ID	WAREHOUSE	>
Suggested Item		

After launching Batch Picking, the picker can begin by loading a Batch Pick ID, or by selecting Sales Docs to group orders into a batch pick.

Batch Pick ID

The Batch Pick ID lookup shows all batch picks that can be loaded for picking. Each batch pick displays helpful information like how many sales orders it contains, how many unique items it needs across those orders, and how much total quantity across all sales lines needs to be fulfilled on those orders. Note that the needed quantity simply sums the quantities for each sales line in their current UofM.



Batch Pick ID	Info
BP000000001	Sales Docs: 2 > Items: 3 Qty to Pick: 34
BP000000005	Sales Docs: 4 > Items: 2 Qty to Pick: 8
BP000000006	Sales Docs: 2 > Items: 3 Qty to Pick: 36
BP000000010	Sales Docs: 1 > Items: 1 Qty to Pick: 20
BP000000011	Sales Docs: 2 > Items: 4 Qty to Pick: 63

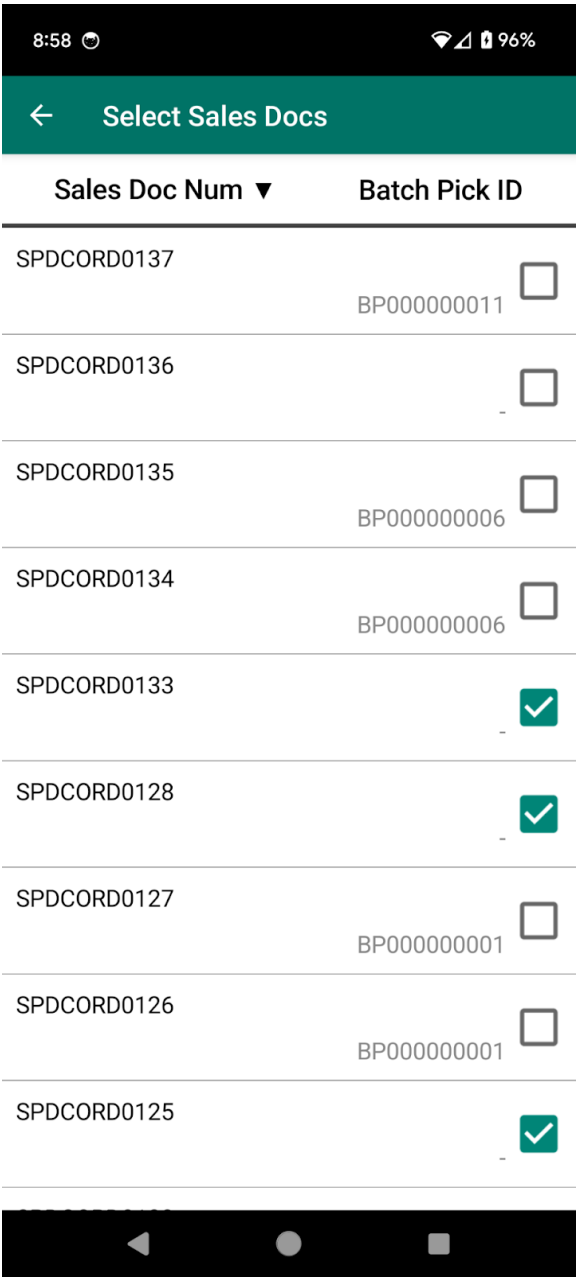
Selecting a batch pick from the lookup, or scanning or manually typing a valid ID in the Batch Pick ID cell, will load that batch pick in the module. This updates the Sales Docs and Doc Num cells to list all orders that are part of that batch pick, and item suggestions or Directed Picking recommendations will also load at this time. The Site cell will also update to the warehouse for that batch pick.

If the picker needs to create a new batch pick, then they should skip the Batch Pick ID and instead start with the Sales Docs.

Sales Docs

When the picker is allowed to create batch picks on the mobile device, then the Sales Docs cell can be used to add orders to a pending list for grouping into a batch pick. Orders in the lookup can be flagged to add

them to the list, or unflagged to remove them from the list. Orders can also be scanned or manually typed into the cell, which adds them to the list and updates them to be flagged in the lookup. After the first order is added to the list, the Site cell updates to that warehouse for that order, and all other orders added to the list must have that same warehouse.



Sales Doc Num ▼	Batch Pick ID
SPDCORD0137	BP000000011 <input type="checkbox"/>
SPDCORD0136	- <input type="checkbox"/>
SPDCORD0135	BP000000006 <input type="checkbox"/>
SPDCORD0134	BP000000006 <input type="checkbox"/>
SPDCORD0133	- <input checked="" type="checkbox"/>
SPDCORD0128	- <input checked="" type="checkbox"/>
SPDCORD0127	BP000000001 <input type="checkbox"/>
SPDCORD0126	BP000000001 <input type="checkbox"/>
SPDCORD0125	- <input checked="" type="checkbox"/>

Performing the first submission for an item, or clicking the info icon on the Batch Pick ID cell, will officially create the batch pick containing all flagged orders. Note that item suggestions and Directed Picking autopopulation and recommendations cannot be presented until the batch pick is created; if these are needed, then tap the Batch Pick ID info icon to create the batch pick, which will also load the recommendations to help guide the first submission. Once a batch pick is created, orders cannot be added to

or removed from that batch pick on the mobile app; at that point, batch picks must be modified on the server's Batch Picking Configuration screen.

If the Batch Pick ID cell does not currently have a value, then the Sales Docs lookup will include orders which are already assigned to batch picks. Selecting one of those orders will populate the Batch Pick ID and Sales Docs cells with the batch pick's information as if the picker selected it from the Batch Pick ID lookup. Orders which are already assigned to batch picks cannot be added to the list if the picker is creating a new batch pick.

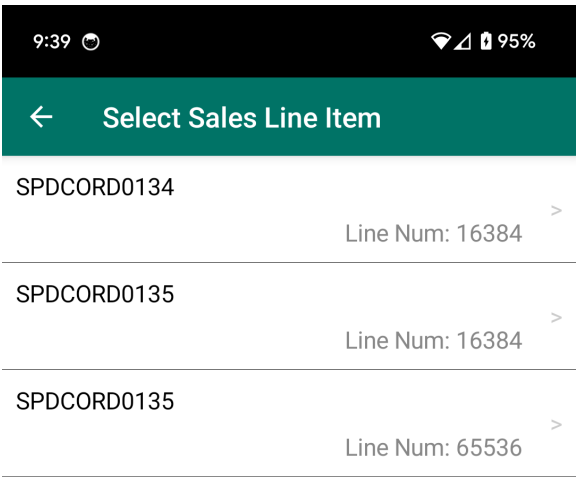
When there is a currently selected batch pick that is not new, then the Sales Docs lookup only shows the orders that are part of the batch pick.

When the picker is not allowed to create batch picks on the mobile device, then when there is no selected batch pick, the Sales Docs lookup will only show sales documents which are assigned to batch picks.

Doc Num and UDFs

A sales order must be selected in the Doc Num cell before submitting when using Manual Fulfillment mode; otherwise, the Doc Num cell is neither used nor visible. Viewing and editing user defined fields (UDFs) for sales orders is possible when the Doc Num cell is visible, and clicking its info icon will launch the UDF screen for the selected order.

Viewing and editing UDFs for sales lines is also available. Clicking the info icon on the Item Num cell will launch the UDF screen for the selected line if applicable, or it will prompt the picker to select a sales line if there are multiple lines for the same item within the batch pick.



UDF visibility and editability is controlled by configuration in the Security Editor and the Mobile Layout Manager.

Item Num, Serial/Lot, From Bin, and Quantity

Typical fulfillment information is required for each submission. The item

number and UofM must be selected, serial and lot numbers must be specified if the item is tracked, and the pull from bin must be entered if the environment is multibin. Quantity can be entered manually, or it can auto-increment on each item scan based on configuration, and it will auto-increment as serial numbers are added.

The item quantity breakout per sales order can be made visible so the picker knows how much of each item to give to each order. This is helpful in Automatic Fulfillment mode, and it aligns with a process where the picker is grouping items for each order on a mobile cart as they pull them. The item quantity breakout can be turned off via the *Sales Document Quantity Breakout* security so it does not take up space if it is not needed.

9:51

99%

←

Batch Picking

SUBMIT

Clear Fields

Batch Pick ID

BP000000006

>

Sales Docs

2

>

Item Num

A100

i

>

Non Tracked

Audio System

Qty

0

-

+

Qty to Pick

20

Total Qty to Pick

20

SPDCORD0134 - 5 EACH

SPDCORD0135 - 15 EACH

UofM

EACH

>

From Bin

>

To Bin

STAGING1

>

Site ID

WAREHOUSE

Submission and Staged Quantity

On submission, the specified quantity is staged against applicable sales orders and lines in the batch pick. When Batch Picking is set to a mode that also creates fulfillments, the staged quantities always align with the fulfilled quantities. In Manual Fulfillment mode, this applies the staged and fulfilled quantities to the specific order and line selected by the picker. In Automatic Fulfillment mode, this applies the staged and fulfilled quantities to orders that need that item in Sales Doc Num sequence and lines in Line Num sequence. In No Fulfillment mode, no fulfillments are created, and the staged quantities are applied following the same sequence as Automatic Fulfillment.

Staged quantities are tracked in the background and used for Batch Picking, but they are not made explicitly visible in Inventory Manager or SalesPad. They can be reviewed with Quick Reports in SalesPad and Grid Reports in Inventory Manager by referencing the Qty Staged in spwms.SalesLineItem. Staged quantities do not directly affect sales order fulfillment in Dynamics GP or SalesPad, and the core Picking module will not explicitly prevent fulfilling documents that have any staged quantity. When integrating Batch Picking with a secondary Picking step (No Fulfillment mode), it is highly recommended to use a combination of bin transfers and workflow with the possible configuration options to ensure that orders are fully staged before they proceed to the fulfillment step.

Bin Transfer

As part of the submission, there is an optional bin transfer that can occur to move the items from their stock bins to a staging bin. There is a *Default Staging Bin* setting that can silently transfer the items to a particular bin without requiring the picker to select the destination bin each time. Alternatively, if the picker should select a bin (for example because there are multiple staging areas), then they can select, scan, or enter the To Bin, which will override the *Default Staging Bin* for that submission.

9:58
100%

Batch Picking
SUBMIT

Clear Fields

Batch Pick ID
BP000000006
>

Sales Docs
2
>

Item Num
A100
i
>

Non Tracked
Audio System

Qty
20
-
+

Qty to Stage
20

Total Qty to Stage
20

SPDCORD0134 - 5 EACH
SPDCORD0135 - 15 EACH

UOfM
EACH
>

From Bin
BIN A
>

To Bin
STAGING1
>

Site ID
WAREHOUSE

This functionality is helpful for multiple reasons. It moves inventory out of the stock bins, so that upcoming stock counts are more accurate and so subsequent item picking suggestions do not send pickers to those bins for items that are no longer there. It moves inventory to the staging bins, which makes it easier for a secondary fulfillment step that can focus on items that are in one specific bin. And the To Bin override functionality allows choosing a destination bin, which makes it possible to have multiple staging areas to better organize the items that are being fulfilled.

Workflow Updates

The final part of the submission updates the sales orders in workflow, and there are several options for how this can work. Batch Picking can be configured to forward the orders on their first submission, and/or on their final submission. There are options for whether to forward using Remote

Library, which uses SalesPad workflow and can follow workflow rules and trigger workflow plugins, or it can simply update the queue to a specific destination queue.

If this is the first submission for this batch pick, then *Forward Documents On Staging Started Using SalesPad* determines whether all orders in the batch pick are forwarded one step in workflow using Remote Library. If that setting is disabled, then *Staging Started Batch* determines the workflow queue into which the orders are placed. If that setting is not set, then no workflow movement occurs on the first submission. Workflow updates on the first submission are helpful when it is desired to be able to tell when batch picks have begun, e.g. they move from READY TO STAGE to BEING STAGED.

If this is the final submission for this batch pick (which is automatically determined when the submission has staged the last needed items for the grouped orders), then *Forward Documents On Staging Finished Using SalesPad* determines whether all orders in the batch pick are forwarded one step in workflow using Remote Library. If that setting is disabled, then *Staging Finished Batch* determines the workflow queue into which the orders are placed. If that setting is not set, then no workflow movement occurs on the final submission. Workflow updates on the final submission are helpful when it is desired to be able to tell when staging and/or picking is complete, e.g. they move from BEING STAGED to READY TO PICK (No Fulfillment mode), or from BEING PICKED to READY TO PACK (Auto or Manual Fulfillment mode).

No Fulfillment Mode

When Batch Picking's *Fulfillment Option* is set to No Fulfillment, then Batch Picking operates as a staging activity where item quantities are flagged as staged, but they are not actually fulfilled to each order. This mode supports a process where there is an initial item pull step where all needed items are retrieved from the stock area and staged in a certain location, and then there is a secondary item fulfill step where the standard Picking module is used to fulfill those items to their individual orders. This breaks the picking process into two steps, so that it streamlines the item pull stage while still ensuring that all orders ship the correct items. Pickers do not need to select a specific order and line in this mode, and they can submit quantities that span across multiple orders and lines at once.

Non-tracked item submission example:

10:05

100%

<

Batch Picking

SUBMIT

Clear Fields

Batch Pick ID

BP000000006

>

Sales Docs

2

>

Item Num

A100

i

>

Non Tracked

Audio System

Qty

20

-

+

Qty to Stage

20

Total Qty to Stage

20

UOfM

EACH

>

From Bin

E01S3

>

To Bin

STAGING1

>

Site ID

WAREHOUSE

Suggested Item

Serial-tracked item submission example:

10:06

100%

←

Batch Picking

SUBMIT

Clear Fields

Batch Pick ID

BP000000006

>

Sales Docs

2

>

Item Num

100XLG

i>

Serial Tracked

Green Phone

Serial Num

i>

Last Serial #:

19042

Qty

8

Qty to Stage

8

Total Qty to Stage

8

UoFM

EACH

>

From Bin

E10S4

>

To Bin

STAGING1

>

Lot-tracked item submission example:

10:07 100%

← Batch Picking SUBMIT

Clear Fields

Batch Pick ID BP000000006 >

Sales Docs 2 >

Item Num CAP100 ⓘ >

Lot Tracked
Capacitor

Lot Num LOT A >

Qty 8 - +

Qty to Stage 8

Total Qty to Stage 8

UoFM EACH >

From Bin BIN A >

To Bin STAGING1 >

Site ID WAREHOUSE

For this use case, it is highly recommended to use workflow to streamline the process and ensure that batch picks are fully staged before they proceed to the secondary fulfillment step:

- Batch Picking can target a specific workflow queue via the *Batch Picking Lookup Batch* setting, e.g. READYTOSTAGE.
 - If multiple READYTOSTAGE queues are needed, then the Mobile Batch Picking security for *Sales Document Lookup Batch* can be used to override the global setting value for each user group.
- The Batch Picking settings for *Forward Documents On Staging Finished Using SalesPad* or *Staging Finished Batch* can be used to update the orders to a new workflow queue once they are fully staged, e.g. from READYTOSTAGE to READYTOFULFILL.

- The Picking module's *Picking Sales Document Lookup Batch* setting can be set to READYTOFULFILL so that pickers only see orders in the Picking lookup once they are ready for that step.
 - If multiple READYTOFULFILL queues are needed, then the Mobile Picking security for *Sales Document Lookup Batch* can be used to override the global setting value for each user group.
- The Picking module's *Picking Restrict Sales Document By Batch* setting can be enabled to ensure that orders are in READYTOFULFILL even if the picker scans or selects the order instead of using the lookup.

Manual Fulfillment Mode

When Batch Picking's *Fulfillment Option* is set to Manual Fulfillment, then Batch Picking will require the picker to specify the order and line for each submission. This takes extra time, as the picker will not be able to submit the full item quantity at once if it must be fulfilled across multiple orders; instead, they will need to submit each quantity needed for each individual order and line. The benefit is that this provides full accuracy in knowing which item is fulfilled to each order, while still streamlining the process for gathering all of those items from stock. This mode supports processes where serial/lot items are shipped and must be assigned to their specific orders, as well as processes where the picker needs full control over how fulfillments are created.

Non-tracked item submission example:

10:12

100%

←

Batch Picking

SUBMIT

Clear Fields

Batch Pick ID

BP000000006

>

Sales Docs

2

>

Doc Num

SPDCORD0135

>

Item Num

A100

i

>

Non Tracked

Audio System

Qty

15

-

+

Qty to Pick

15

Total Qty to Pick

20

SPDCORD0134 - 5 EACH

SPDCORD0135 - 15 EACH

UoM

EACH

>

From Bin

BIN A

>

To Bin

STAGING1

>

Serial-tracked item submission example:

10:12

100%

←

Batch Picking

SUBMIT

Clear Fields

Batch Pick ID

BP000000006

>

Sales Docs

2

>

Doc Num

SPDCORD0134

>

Item Num

100XLG

i

>

Serial Tracked

Green Phone

Serial Num

i

>

Last Serial #: 19039

Qty

5

Qty to Pick

5

Total Qty to Pick

8

SPDCORD0134 - 5 EACH

SPDCORD0135 - 3 EACH

UoFM

EACH

>

Lot-tracked item submission example:

10:13
100%

←
Batch Picking
SUBMIT

Clear Fields

Batch Pick ID
BP000000006
>

Sales Docs
2
>

Doc Num
SPDCORD0134
>

Item Num
CAP100
i
>

Lot Tracked
Capacitor

Lot Num
LOT B
>

Qty
5
-
+

Qty to Pick
5

Total Qty to Pick
8

SPDCORD0134 - 5 EACH
SPDCORD0135 - 3 EACH

UoFM
EACH
>

From Bin
E01S3
>

Automatic Fulfillment Mode

When Batch Picking's *Fulfillment Option* is set to Automatic Fulfillment, then Batch Picking will automatically fulfill the picked items to the orders as the picker submits. It will not ask the picker to specify the individual order or line for each fulfillment, so they can submit the full item quantity needed without breaking it out per order. This mode supports a process where serial/lot item tracking is not used, and so items can be fulfilled to any order without keeping track of which exact items were shipped for each order. This mode also supports a process where Batch Picking is used for consolidated shipments, where all items will ship together to the same customer anyway, so it is not necessary to specifically assign them to individual orders.

Pickers do not need to select each order and line in this mode, and they can submit quantities that span across multiple orders and lines at once. The background logic will automatically apply the fulfillments in Sales Doc Num and Sales Line Num order, and it can apply fulfillments to multiple orders for one submission.

Non-tracked item submission example:

10:19

100%

←

Batch Picking

SUBMIT

Clear Fields

Batch Pick ID

BP000000006

>

Sales Docs

2

>

Item Num

A100

i

>

Non Tracked

Audio System

Qty

20

-

+

Qty to Pick

20

Total Qty to Pick

20

SPDCORD0134 - 5 EACH

SPDCORD0135 - 15 EACH

UoM

EACH

>

From Bin

BIN A

>

To Bin

STAGING1

>

Site ID

WAREHOUSE

Serial-tracked item submission example:

10:20

100%

←

Batch Picking

SUBMIT

Clear Fields

Batch Pick ID

BP000000006

>

Sales Docs

2

>

Item Num

100XLG

i>

Serial Tracked

Green Phone

Serial Num

i>

Last Serial #: 19042

Qty

8

Qty to Pick

8

Total Qty to Pick

8

SPDCORD0134 - 5 EACH

SPDCORD0135 - 3 EACH

UoFM

EACH

>

From Bin

E10S4

>

Lot-tracked item submission example:

10:20 100%

← Batch Picking SUBMIT

Clear Fields

Batch Pick ID BP000000006 >

Sales Docs 2 >

Item Num CAP100 ⓘ >

Lot Tracked
Capacitor

Lot Num LOT C >

Qty 8 - +

Qty to Pick 8

Total Qty to Pick 8

SPDCORD0134 - 5 EACH
SPDCORD0135 - 3 EACH

UoM EACH >

From Bin E01S3 >

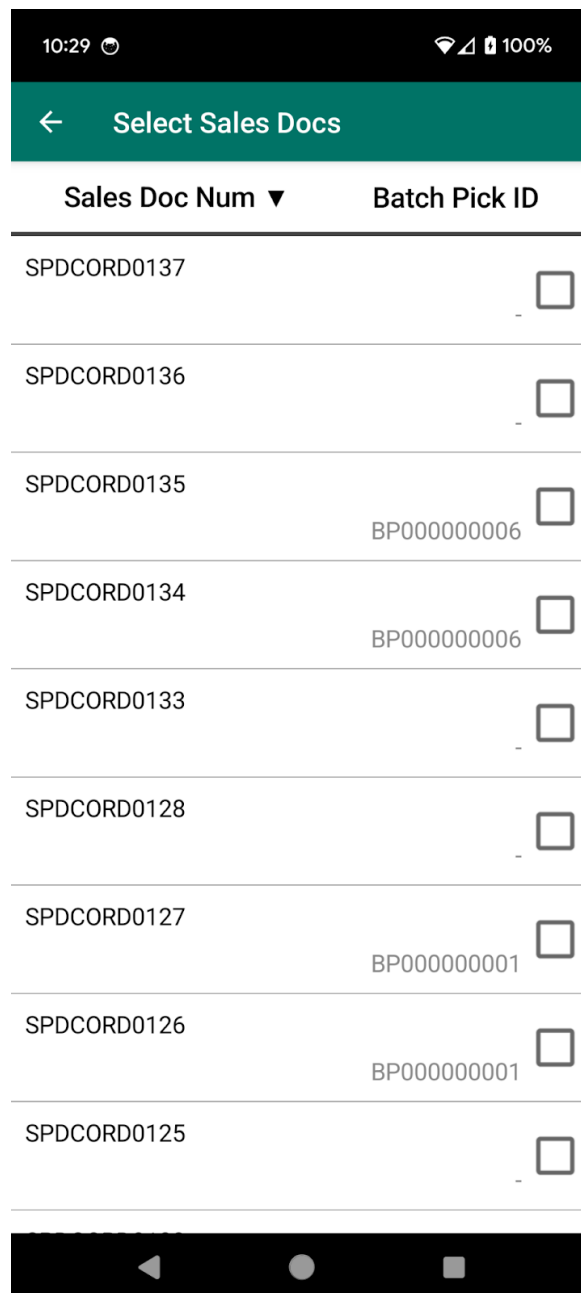
To Bin STAGING1 >

With Picking Assignments

Batch Picking can be used with Picking Assignments to assign batch picks to pickers and/or picking groups, and tailor picker visibility in the app to their assigned batch picks. These assignments can be created manually on the server's Picking Assignments screen, or they can be created automatically when pickers submit for the first time in the mobile Batch Picking module based on the *Automatically Assign Picking Users/Groups To Sales Orders* securities. Then picker visibility can be adjusted via the *Restrict To Assigned Picking User/Group* securities, which tailors their view to only the orders assigned to them, and/or orders that are not assigned to anyone yet. This helps to streamline the fulfillment process by showing pickers what they should work on, and helping to avoid double-picking

orders.

Because pickers can be allowed to create batch picks on-the-fly on the mobile app, Batch Picking restricts the visibility of available orders in the Sales Docs lookup based on the *Restrict To Assigned Picking User/Group* securities. This allows pickers to see only their assigned orders, and/or only those orders that are not assigned to anyone, and then they can group those into a batch pick and pick them together. They can also use this view to determine which batch pick to work on next, as loading an order that is already assigned a Batch Pick ID will automatically load that batch pick as well.



Sales Doc Num ▼	Batch Pick ID
SPDCORD0137	- <input type="checkbox"/>
SPDCORD0136	- <input type="checkbox"/>
SPDCORD0135	BP000000006 <input type="checkbox"/>
SPDCORD0134	BP000000006 <input type="checkbox"/>
SPDCORD0133	- <input type="checkbox"/>
SPDCORD0128	- <input type="checkbox"/>
SPDCORD0127	BP000000001 <input type="checkbox"/>
SPDCORD0126	BP000000001 <input type="checkbox"/>
SPDCORD0125	- <input type="checkbox"/>

The Picking Assignments screen on the server includes the Batch Pick ID

column in the sales orders grid to provide visibility of how the orders are grouped. When a picking assignment is created for one order, it will automatically be assigned to all orders in the batch pick. When the balanced assignments feature is used, it will consider the total quantities and unique items for all orders in a batch pick when determining possible assignments compared to the picker capacity and complexity constraints.

Picking Assignments

Search Options

Sales Doc Num: Sales Batch: From Doc Date: From Req Ship Date:

Customer Num: Picking User: To Doc Date: To Req Ship Date:

Warehouse: Picking Group:

Picking Assignments

Picker To Assign: Assign Picker Unassign Picker ☐ Balanced Assignments

Group To Assign: Assign Group Unassign Group ☐ Picker Capacity Warnings

Sales Doc Num	Customer Name	Shipping Method	Warehouse Code	Req Ship Date	Total Items To Fulfill	Total Lines To Fulfill	Total Qty To Fulfill	Batch Pick ID	Picking User
SPDCORD0137	Northern State College	GROUND	WAREHOUSE	12/19/2024	1	3	3		
SPDCORD0136	Adam Park Resort	GROUND	WAREHOUSE	12/19/2024	4	5	89		jacob
SPDCORD0135	Aaron Fitz Electrical	GROUND	WAREHOUSE	12/18/2024	3	4	21	BP000000006	jon
SPDCORD0134	Aaron Fitz Electrical	GROUND	WAREHOUSE	12/18/2024	3	3	15	BP000000006	jon
SPDCORD0133	Aaron Fitz Associates	LOCAL DELIVERY	WAREHOUSE	12/13/2024	1	2	150		sinisa

Picking User Capacity

Picking User	Current Quantity	Min Quantity	Max Quantity
jacob	89	0	0
jon	36	0	0
sinisa	150	0	0

Picking Group Capacity

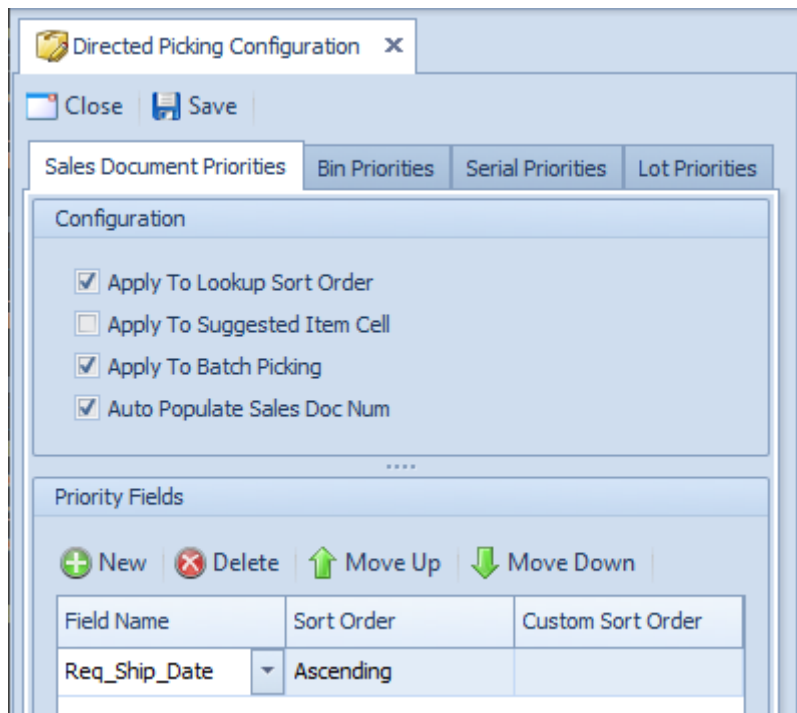
Picking Group	Current Quantity	Min Quantity	Max Quantity
---------------	------------------	--------------	--------------

For more information on Picking Assignments configuration and use, refer to [this documentation](#).

With Directed Picking

Batch Picking can be combined with Directed Picking to truly maximize fulfillment efficiency by multiplying all the benefits of these two powerful features. Batch Picking groups orders into batch picks so they are picked together instead of one-at-a-time, and Directed Picking recommends orders, serials, and lots in the defined priority sequences, while also directing the picker to each bin in the configured sequence. When Directed Picking is enabled for Batch Picking, it reviews all of the items needed for all of the orders in the batch pick, and then it streamlines the pathing needed to pull all of those items while respecting FIFO/FEFO rules.

Directed Picking only needs to be set up once to apply to all picking activities. The Apply To Batch Picking checkbox can be flagged for each of the tabs in the Directed Picking Configuration screen, making those rules also affect Batch Picking.



For Sales Doc Priorities, the highest priority sales order can be automatically populated for the picker. If that order is part of a batch pick, then that Batch Pick ID is automatically populated. Otherwise, that order is added to the Sales Docs list so that it can be grouped into a batch pick by the picker. When the highest priority sales order should be recommended in the suggested item info cell, then that Priority Order is displayed for reference, with the Priority Batch Pick ID if applicable. When the priority sequence should apply to the lookup, then it affects the sequence of the results in the Sales Docs lookup. That lookup also shows the Batch Pick ID for orders, and it will load the batch pick if available when that order is selected, so it can be used to find and load the highest priority batch pick.

For Serial Priorities and Lot Priorities, the highest priority serial/lot can be automatically populated, and/or displayed in the suggested item info cell. This can also affect the sequence of the results in those lookups. This works the same way as standard Picking, where serial/lot population and recommendation occurs when a serial or lot-tracked item is selected for picking.

Bin Priorities are used to route the picker through the warehouse. The same general rules that apply to Picking also apply to Batch Picking, but the logic considers all needed items across all orders in the batch pick. Priority serials and lots are also taken into consideration so that the picker is directed to the bins containing those specific items. All of the special options still apply, such as prioritizing bins based on full vs partial quantity. When alternating the bin path for each order, this will alternate

for each batch pick when using Batch Picking, so that the picker flows from bins A-Z for the first batch pick, then from Z-A for the second batch pick, and so on.

For more information on Directed Picking configuration and use, refer to [this documentation](#).