Directed Picking

Product Development - 2026-02-20 - Miscellaneous

Table of Contents

- Overview
- Directed Picking Configuration
- Directed Picking In Action

Overview

Inventory Manager's Directed Picking functionality makes it possible to optimize warehouse fulfillment activities by recommending sales documents, serials, and lots to the picker, and directing their pick path based on bins.

Sales document priorities can be configured based on any document-level fields, including SalesPad UDFs, to make it easy for pickers to know which orders should be fulfilled first. Serial and lot item priorities can be set up based on any serial/lot fields, including attributes and UDFs, to ensure that pickers are picking serials in FIFO order and lots in FEFO order, or any other priority sequence that makes sense for your business rules.

The pick path can be streamlined by setting up the picking bin sequence, which can be based on any bin fields including bin attributes. When the picker selects a document to pick, its sales lines are reviewed and available items are located, and then the system recommends each next bin and item to pick so that the picker can travel through the warehouse in one smooth flow.

Directed Picking affects the Mobile Picking module by default, and it can also be configured to affect Mobile Batch Picking. This can automatically populate fields for the user, provide on-screen suggestions, and affect the sequence of results in the lookups.

Directed Picking is available as of Inventory Manager 5.14.0.

Directed Picking Configuration

Inventory Manager console provides a Directed Picking Configuration screen where all the priority rules for sales documents, serials, lots, and

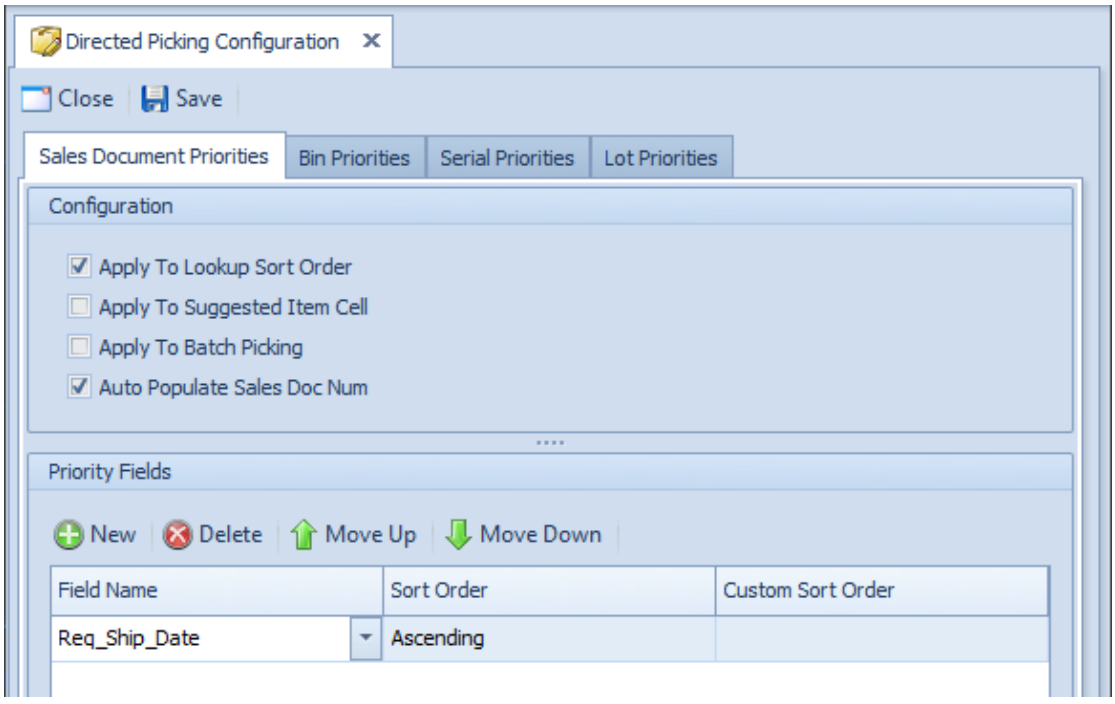
bins are maintained. These rules are global and affect all users who use the Picking module on the mobile app. The only exception is bin priorities, which can be configured for each warehouse.

Each of these categories has its own configuration tab where one or more fields can be selected to control the priority order. Additional configuration options are available to set whether information is automatically populated for the picker and/or recommended in the Suggested Item Info, and whether the priorities also control the ordering of results in the lookups.

Suggested bins can also populate and/or recommend the item that should be picked from that bin. Bin priorities offer advanced options such as alternating the bin priority order for each document that is picked (pick from A-Z then Z-A vs return to the same start point each time), and prioritizing bins based on full vs partial quantities (pick the full quantity needed with fewer stops vs clear out bins with partial quantities).

Sales Document Priorities

The Sales Document Priorities tab allows configuring the priority for sales documents that will be picked in Inventory Manager mobile. This priority logic can be used to automatically populate the sales document field, recommend the document in the Suggested Item Info cell, and/or affect the sequence of the results in the sales document field lookup.



- To recommend sales documents in Req Ship Date order, choose the Req Ship Date field with the Ascending sort order.

- To sort by Req Ship Date and a Priority UDF, add a second field with the Priority UDF and set whether the sort order should be ascending or descending (A-Z vs Z-A).

- For any other order, choose the relevant fields and whether they should sort ascending or descending.

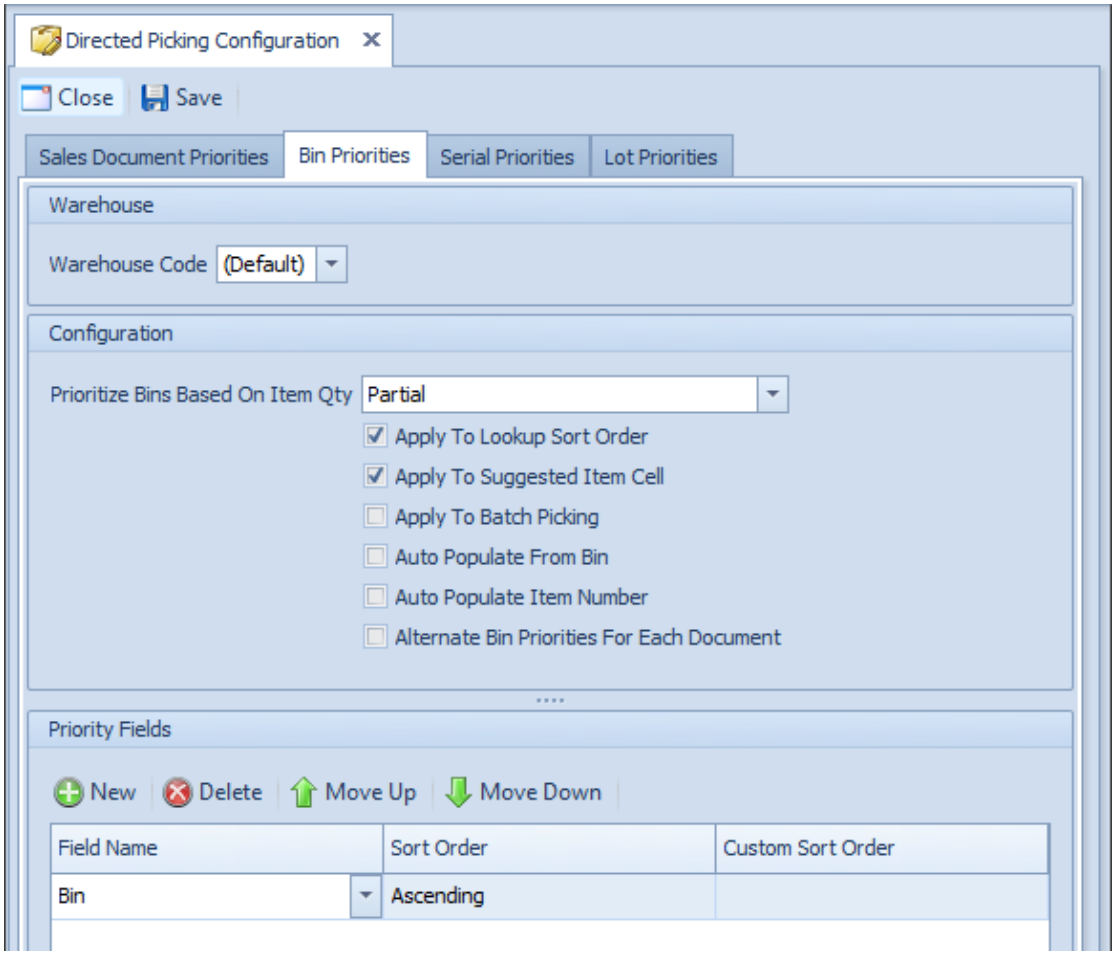
- If more complex sorting is needed, the Sort Order can be set to Custom, and then the Custom Sort Order field can be used to specify the list of values in the exact priority order, separated by semicolons.

Bin Priorities

The Bin Priorities tab allows configuring the priority for bins, which will be used to direct the picker through the warehouse based on the items that need fulfillment on the sales document when picking in Inventory Manager mobile. This priority logic can be used to automatically populate the bin and/or its item to pick, recommend the bin and item in the Suggested Item Info cell, and/or affect the sequence of the results in the bin field lookup.

Bin priorities offer a few more advanced options as well. They can be set up as a global default that applies to all warehouses, or they can be set up for individual warehouses, which will override the global default configuration. They can alternate the pick path for each document, so that the picker fulfills the first document following bins A-Z, then the second document following bins Z-A. This means that the picker will be led back and forth through the warehouse instead of returning to the same starting point each time.

Bin suggestions can also be set up to prioritize full bins or partial bins. When prioritizing full bins, bins that can provide the full needed quantity for an item on the document are suggested before bins that can only fulfill a partial quantity for that item, so that the picker makes fewer stops. When prioritizing partial bins, bins that can only fulfill a partial quantity for an item on the document are suggested before bins that can provide the full needed quantity for that item, so that the picker clears out partial item quantities in bins. When neither of these is selected, then the first bin in the bin priority order that has any quantity of that item will be recommended.



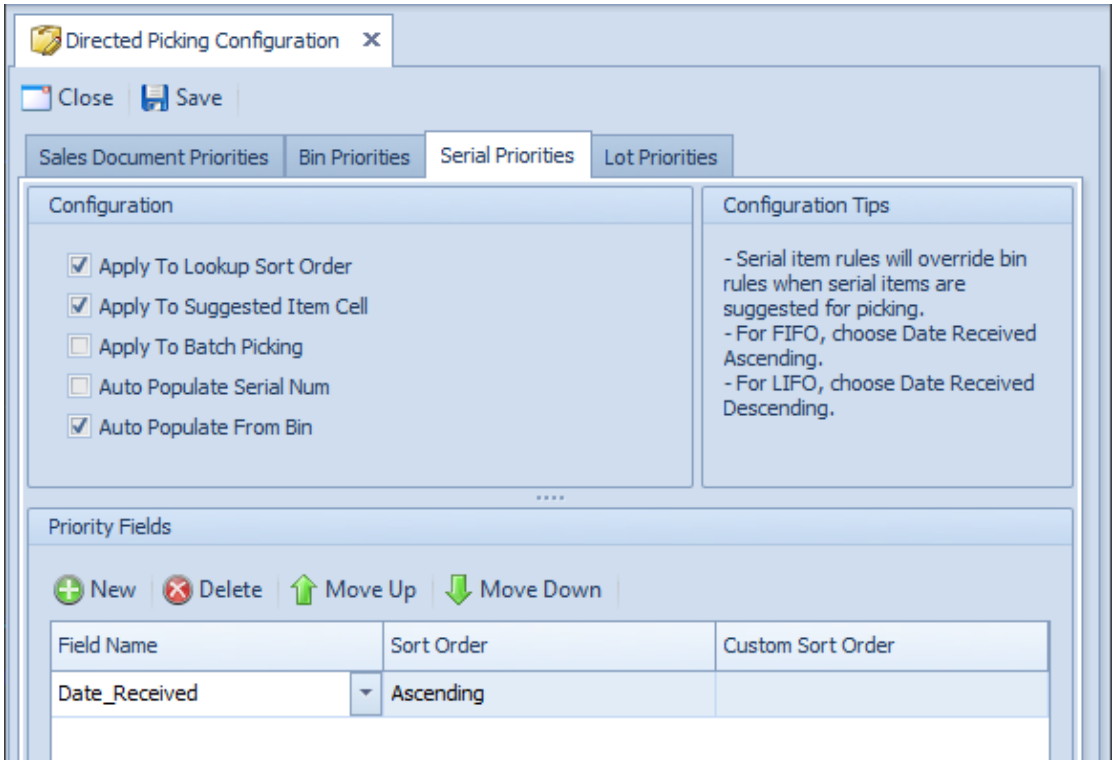
- To recommend bins in bin name order, choose the Bin field with the Ascending sort order.

- For any other order, choose the relevant fields and whether they should sort ascending or descending (A-Z vs Z-A).

- If more complex sorting is needed, the Sort Order can be set to Custom, and then the Custom Sort Order field can be used to specify the list of values in the exact priority order, separated by semicolons.

Serial Priorities

The Serial Priorities tab allows configuring the priority for serial-tracked items that will be picked for sales documents in Inventory Manager mobile. This priority logic can be used to automatically populate the serial and/or its bin, recommend the serial in the Suggested Item Info cell, and/or affect the sequence of the results in the serial num field lookup.



- To recommend serials in FIFO order, choose the Date Received field with the Ascending sort order.

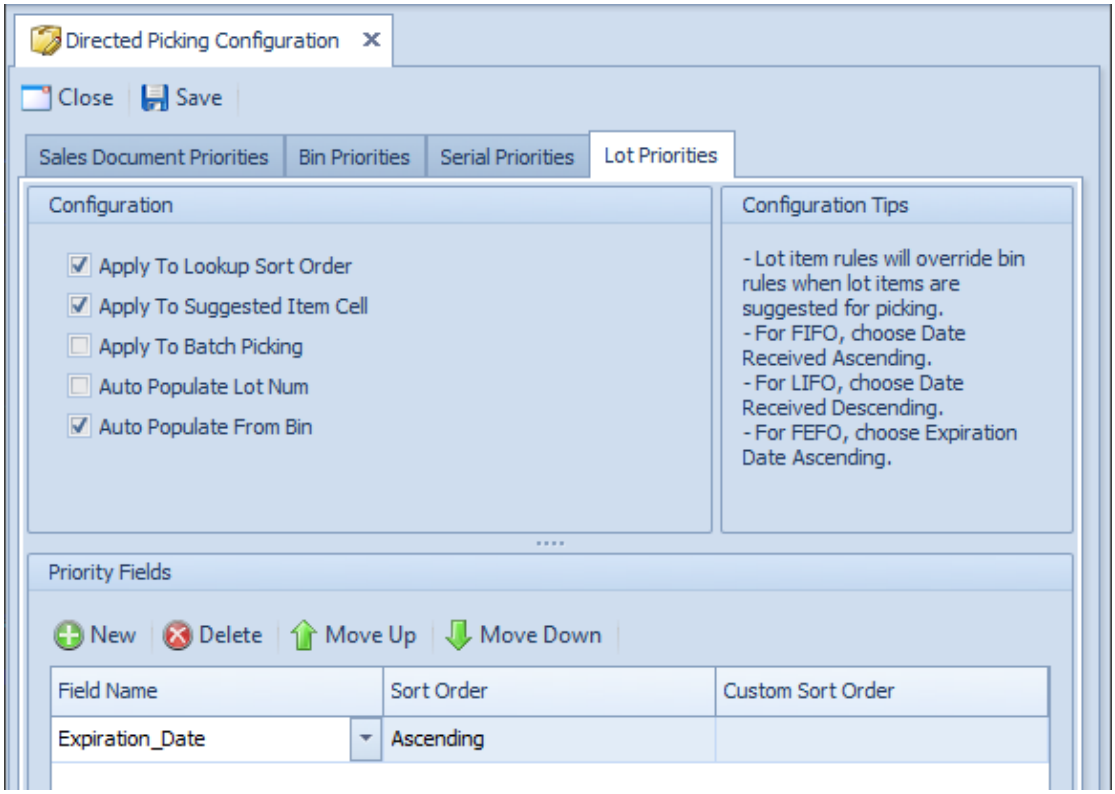
- For LIFO order, choose the Date Received field with the Descending sort order.

- For any other order, choose the relevant fields and whether they should sort ascending or descending (A-Z vs Z-A).

- If more complex sorting is needed, the Sort Order can be set to Custom, and then the Custom Sort Order field can be used to specify the list of values in the exact priority order, separated by semicolons.

Lot Priorities

The Lot Priorities tab allows configuring the priority for lot-tracked items that will be picked for sales documents in Inventory Manager mobile. This priority logic can be used to automatically populate the lot and/or its bin, recommend the lot in the Suggested Item Info cell, and/or affect the sequence of the results in the lot num field lookup.



- To recommend lots in FEFO order, choose the Expiration Date field with the Ascending sort order.

- For any other order, choose the relevant fields and whether they should sort ascending or descending (A-Z vs Z-A).

- If more complex sorting is needed, the Sort Order can be set to Custom, and then the Custom Sort Order field can be used to specify the list of values in the exact priority order, separated by semicolons.

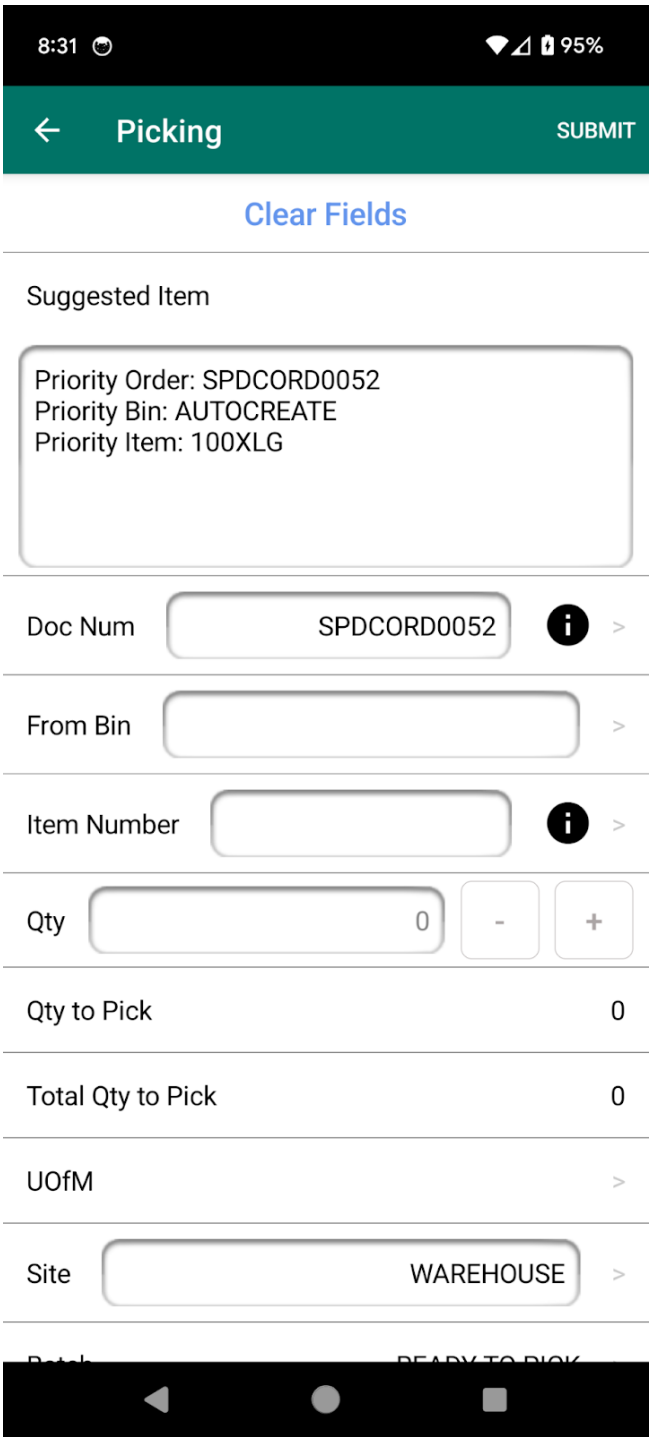
Directed Picking In Action

Within the Inventory Manager mobile app, the Directed Picking functionality integrates directly into the Picking module. Fields automatically populate, the Suggested Item Info cell updates with recommendations, and the lookups reflect the priorities, all based on the server-side configuration.

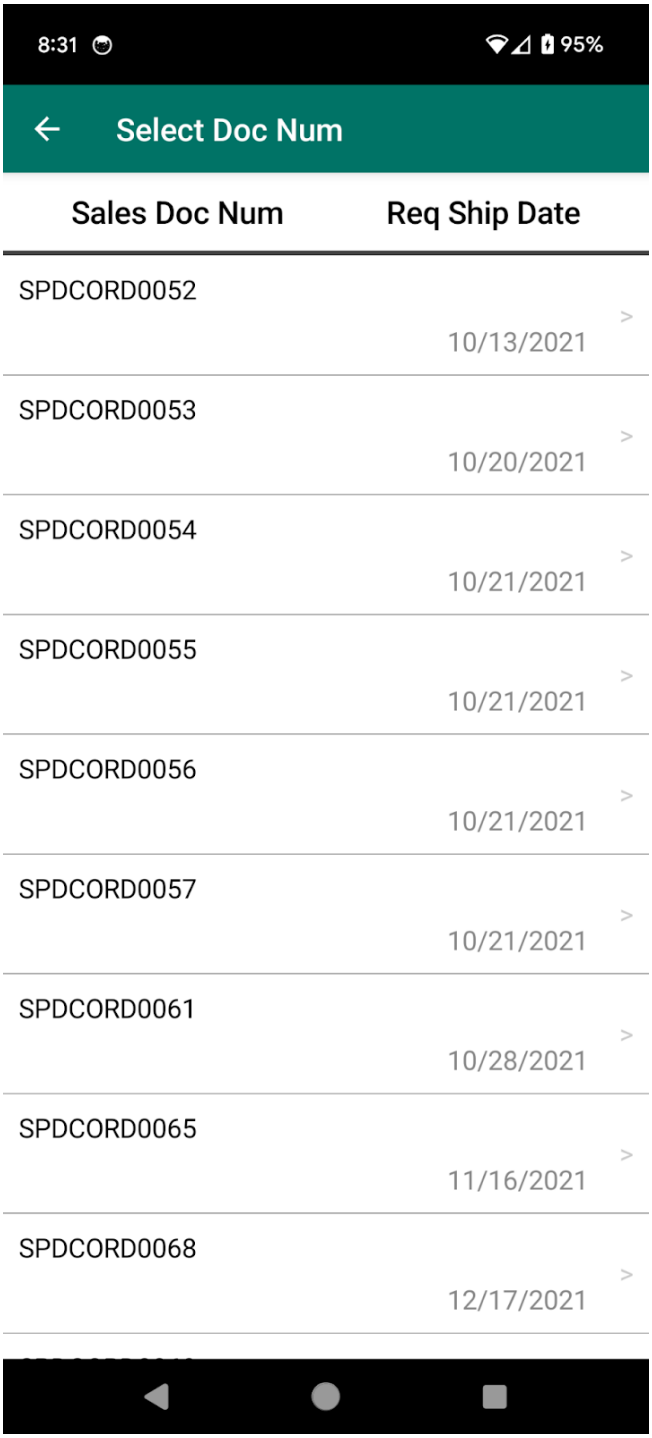
Sales Document Priorities

When the mobile Picking module is launched, sales document priorities will automatically load based on the configuration. The Doc Num cell will populate the highest priority document, and the Suggested Item Cell will

display that document's Sales Doc Num as the Priority Order, as applicable.



When the sales document lookup is opened, it will show the available documents sorted in the priority order if configured to do so. The picker can still tap the column headers to adjust the sort order, and tapping back to the default sort order will reset to the configured priority sequence.



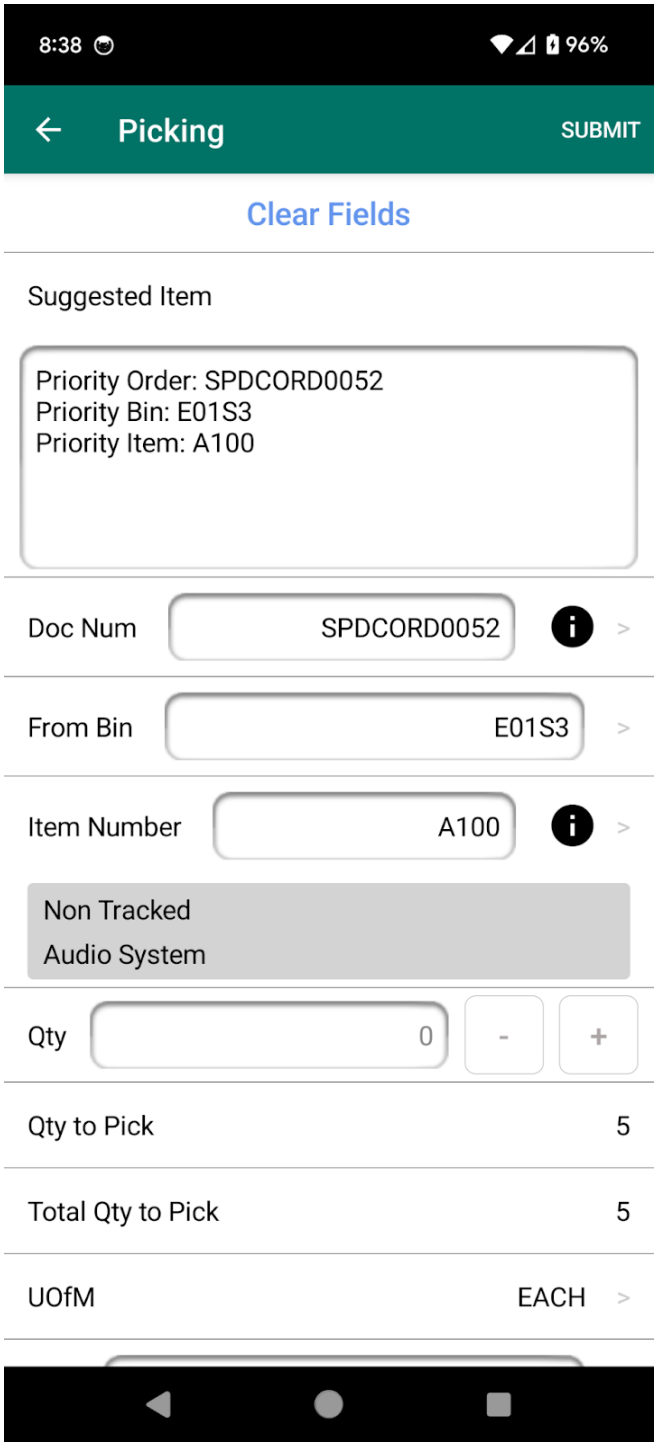
Once the picker submits the final pick for this document, the Picking module will automatically recommend the next highest priority sales document for fulfillment if applicable.

Bin Priorities

When a sales document is loaded for fulfillment, all items that need fulfillment on the document are reviewed. The highest priority bin that can provide at least one item is automatically loaded in the From Bin cell, the item that should be picked from that bin is loaded in the Item Number

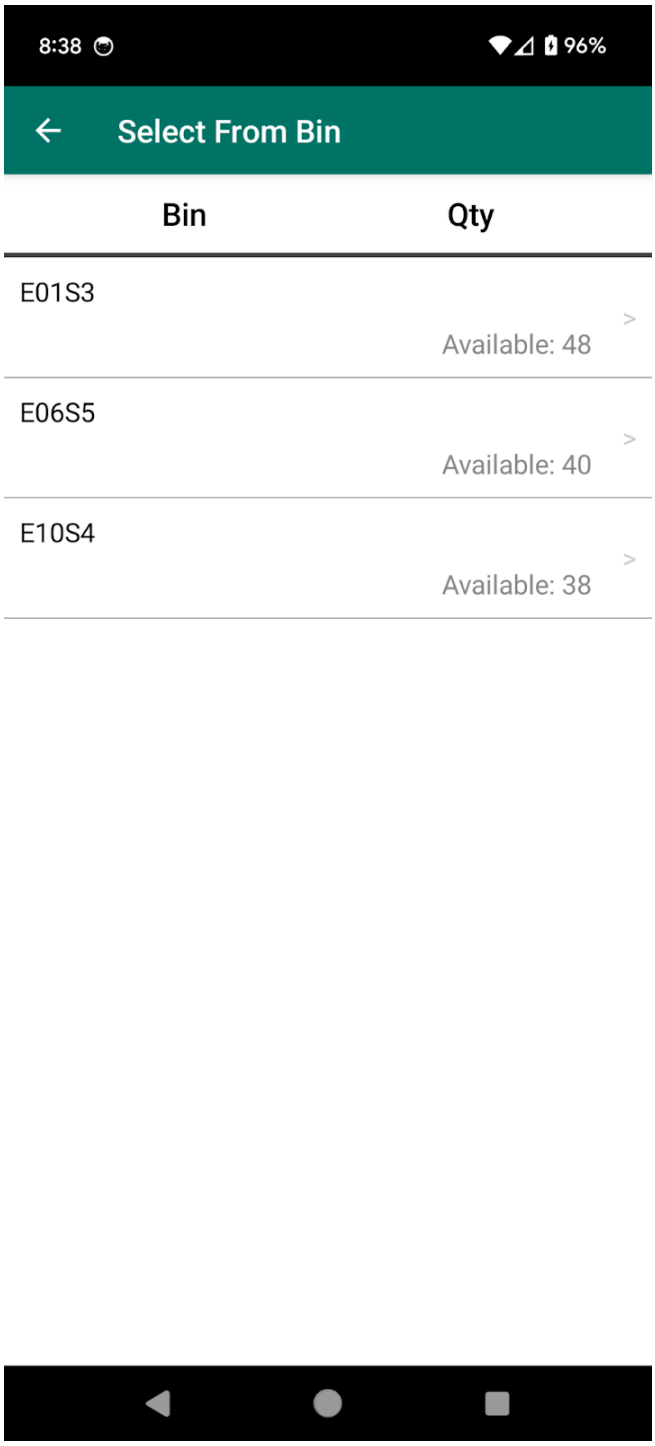
cell, and that bin and item are also recommended in the Suggested Item Info cell as the Priority Bin and Priority Item, as applicable.

This processing takes into consideration whether bin priorities alternate for each document, and whether bins with full or partial quantities should be suggested first. Serial and lot priorities are also respected and can supersede the full/partial bin recommendations.



When the bin lookup is opened, it will show the available bins sorted in the priority order if configured to do so. The picker can still tap the column

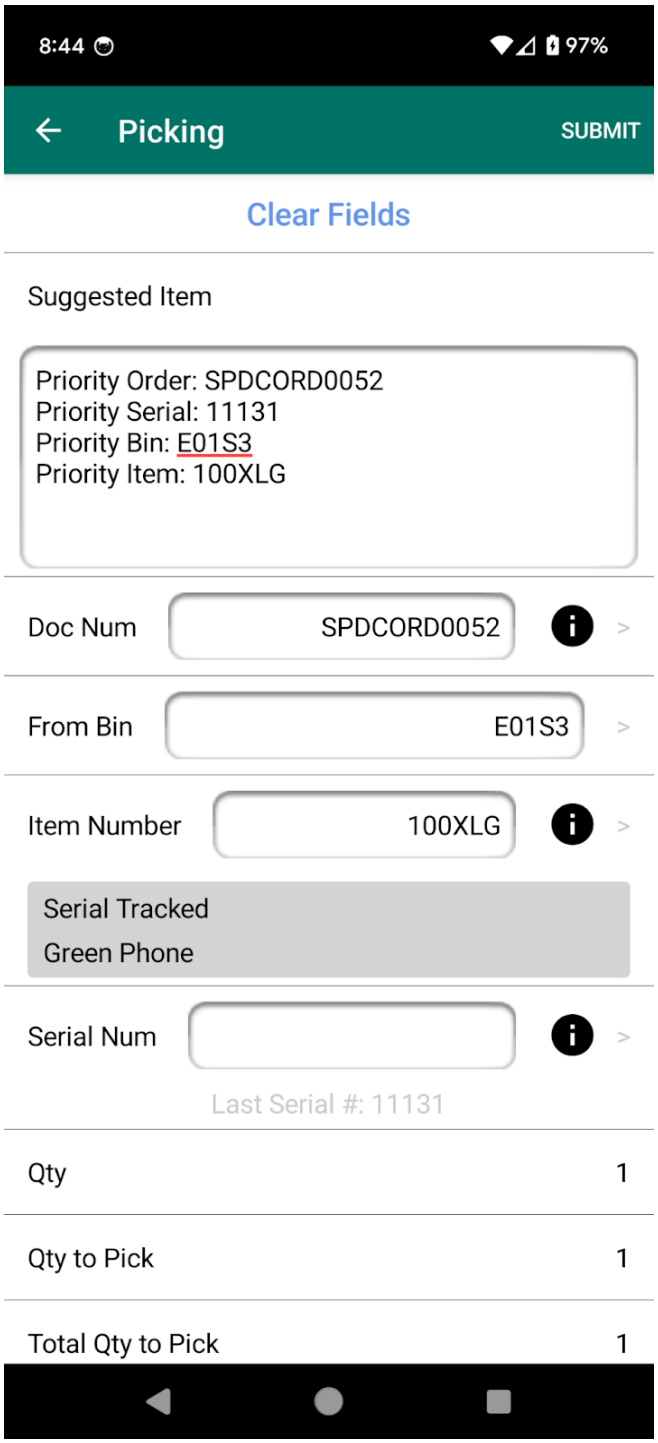
headers to adjust the sort order, and tapping back to the default sort order will reset to the configured priority sequence.



Once the picker submits the pick, the bin and item recommendations will automatically update based on the next item to pick from the next highest priority bin if applicable. If this was the final pick for the document, and the next document is automatically loaded based on the sales document priorities, then that will also trigger automatically populating the highest priority item and bin for the new document.

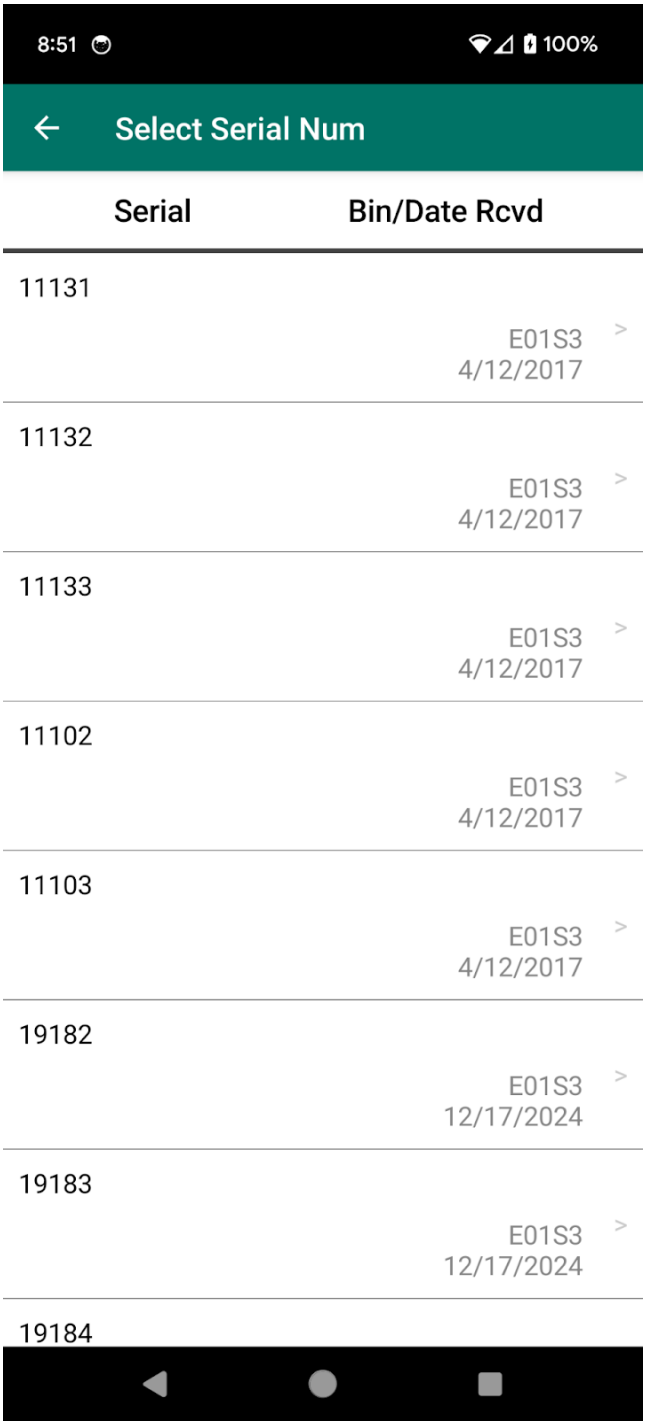
Serial Priorities

When a serial-tracked item is selected in the Item Number cell, all available serial numbers for that item in that warehouse are reviewed. The Serial Num cell will populate the highest priority serial number, the From Bin cell will populate that serial's bin, and the Suggested Item Cell will display that serial and bin as the Priority Serial and Priority Bin, as applicable.



When the serial lookup is opened, it will show the available serials sorted

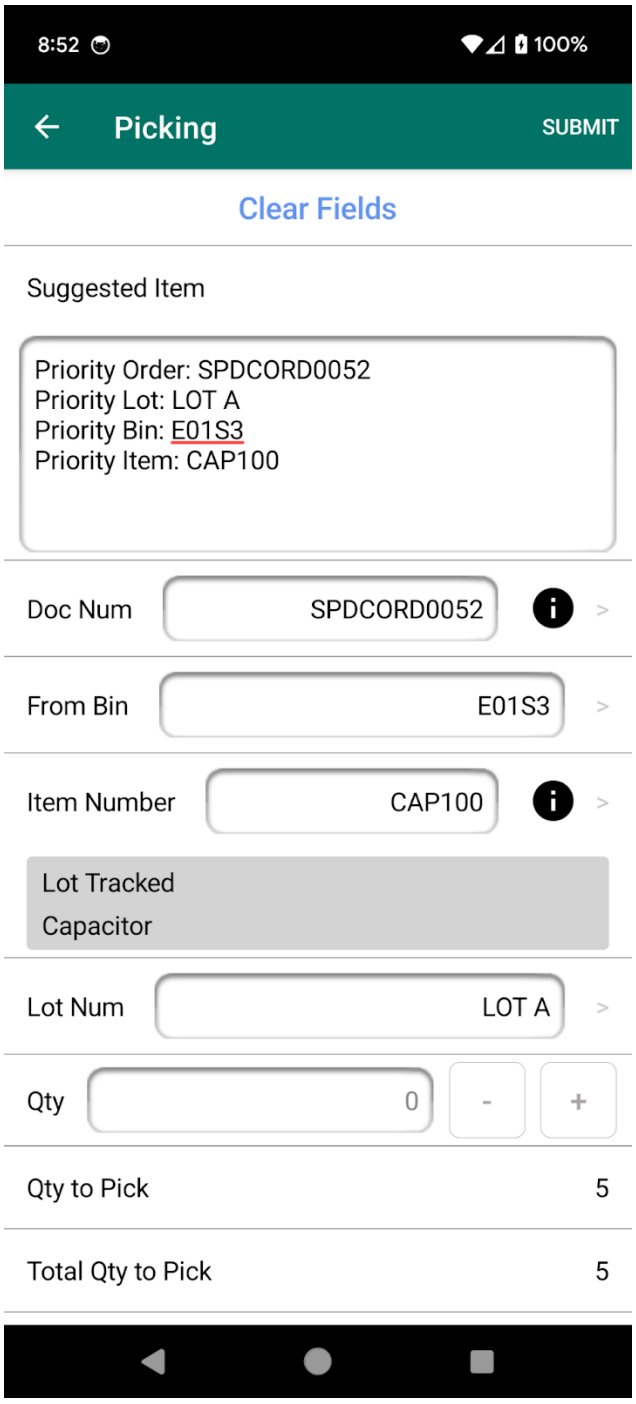
in the priority order if configured to do so. The picker can still tap the column headers to adjust the sort order, and tapping back to the default sort order will reset to the configured priority sequence.



Once the picker submits the pick, the next recommended serial and bin will automatically load if the same item is still selected and has more quantity to fulfill. If a new item is loaded, and that item is serial-tracked, then the serial and bin will update based on that item.

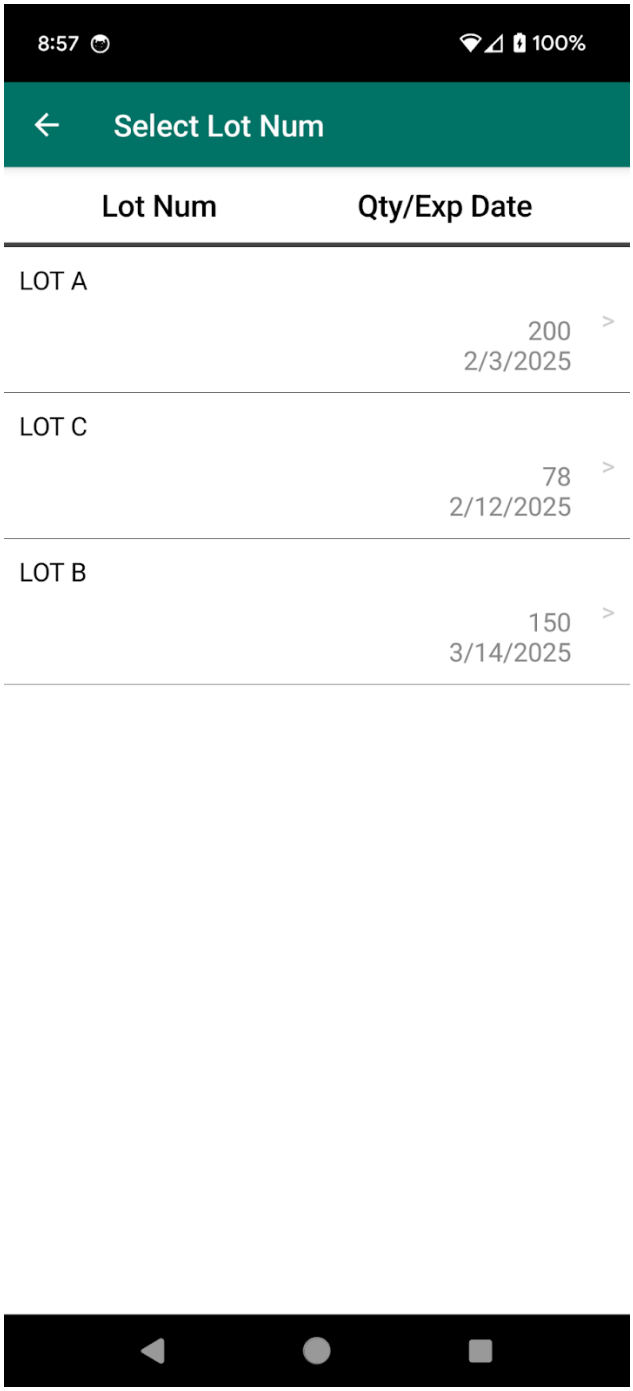
Lot Priorities

When a lot-tracked item is selected in the Item Number cell, all available lot numbers for that item in that warehouse are reviewed. The Lot Num cell will populate the highest priority lot number, the From Bin cell will populate that lot's bin, and the Suggested Item Cell will display that lot and bin as the Priority Lot and Priority Bin, as applicable.



When the lot lookup is opened, it will show the available lots sorted in the priority order if configured to do so. The picker can still tap the column headers to adjust the sort order, and tapping back to the default sort order

will reset to the configured priority sequence.

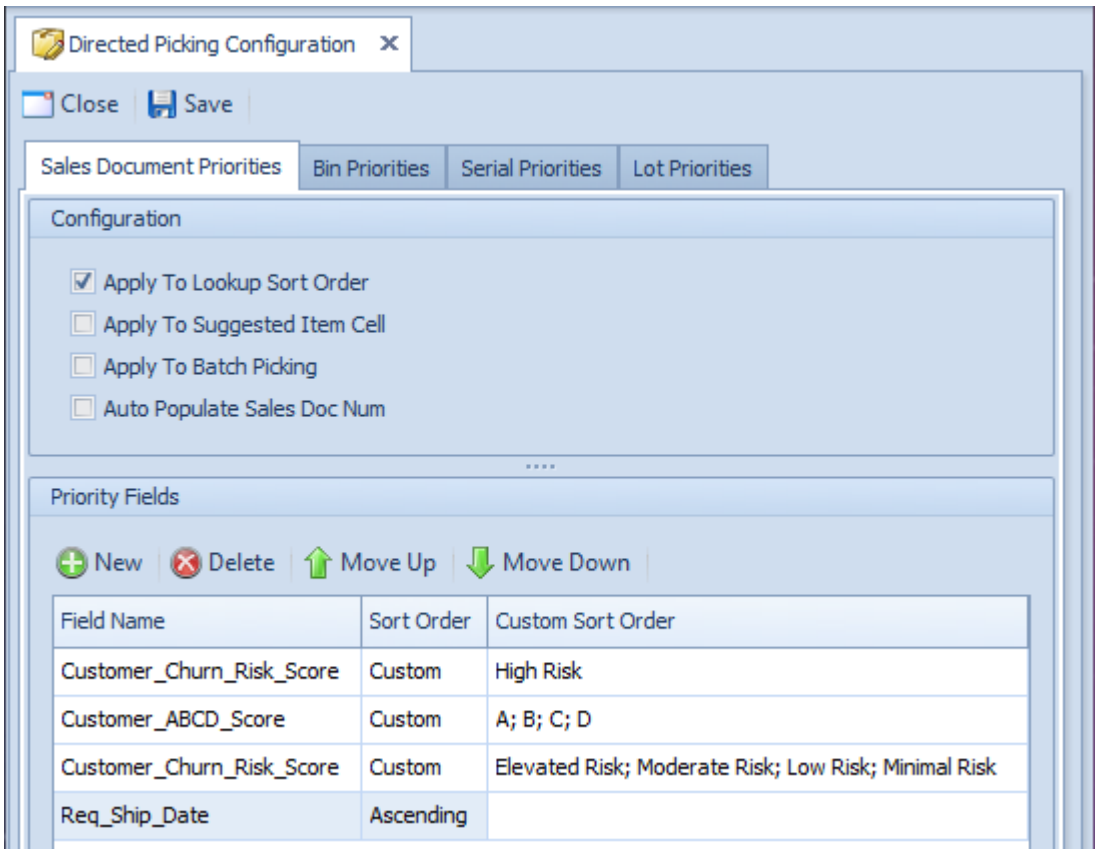


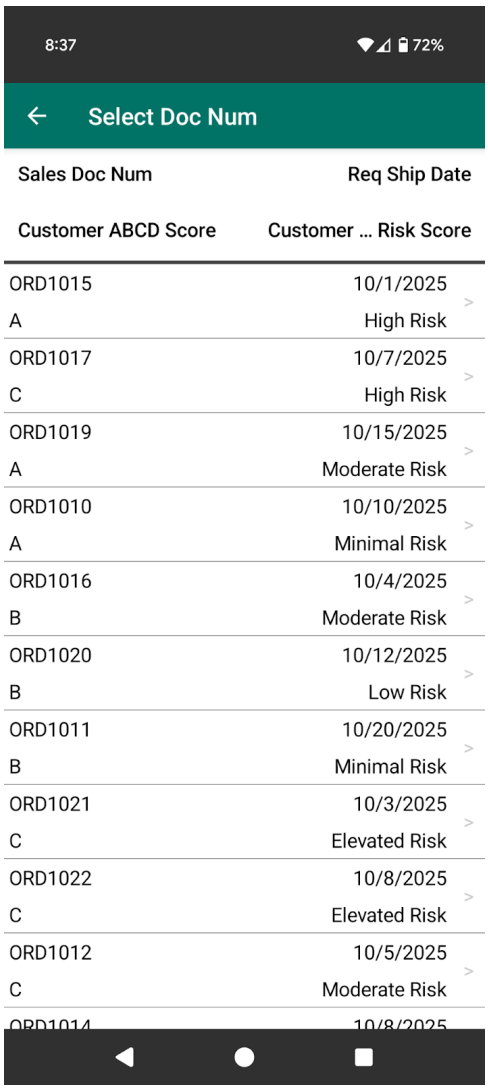
Once the picker submits the pick, the next recommended lot and bin will automatically load if the same item is still selected and has more quantity to fulfill. If a new item is loaded, and that item is lot-tracked, then the lot and bin will update based on that item.

Directed Picking Example

Inventory Manager's Directed Picking functionality can control which sequence sales orders are fulfilled by warehouse pickers. As of Inventory Manager version 5.16.0, the customer's ABCD Score and Churn Risk can be used to prioritize sales order fulfillment.

Directed Picking can handle complex prioritization rules, such as prioritizing all orders for High Risk customers first, and then prioritizing A customers in churn risk order, then B customers in churn risk order, etc. Additional checks can be added as tie-breakers. For example, if there are many orders for A customers who are Elevated Risk, then the Required Ship Date can be used to further refine the sequence for those orders.





For more information on ABCD Score and Churn Risk Score, refer to this documentation.