Zone Picking

Product Development - 2026-01-23 - Miscellaneous

Overview

Inventory Manager's Zone Picking functionality makes it possible to optimize warehouse fulfillment activities by assigning pickers to a zone within the warehouse, which minimizes their travel time while orders are being picked and allows multiple pickers to fulfill the same order. Bins within warehouses can be assigned to zones, and pickers can be assigned specific zones to pick from, which will only allow the picker to pick items that are available within their corresponding zone.

Zone Picking is supported within the Mobile Picking and Mobile Batch Picking modules within the Inventory Manager mobile app.

Zone Picking also supports Directed Picking so that 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 their assigned zone(s).

Zone Picking is available as of Inventory Manager 5.17.0.

Zone Picking Configuration

Securities

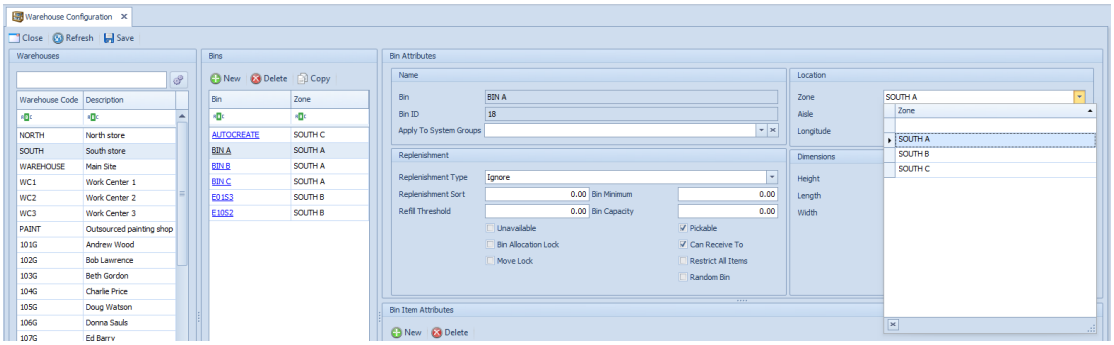
Administrators who want to assign zones to bins and pickers will need access to the Warehouse Configuration, Picking Assignment, and Picking Configuration plugins. The Warehouse Configuration plugin has an optional sub-security which can help with assigning bins to zones.

Filter Zone Options By Warehouse - If set to 'True', the Zone field dropdown for bins will restrict to zones that exist on bins in the same warehouse. If set to 'False', the dropdown will list all zones across all bins, regardless of warehouse.

Bin Zone Assignment

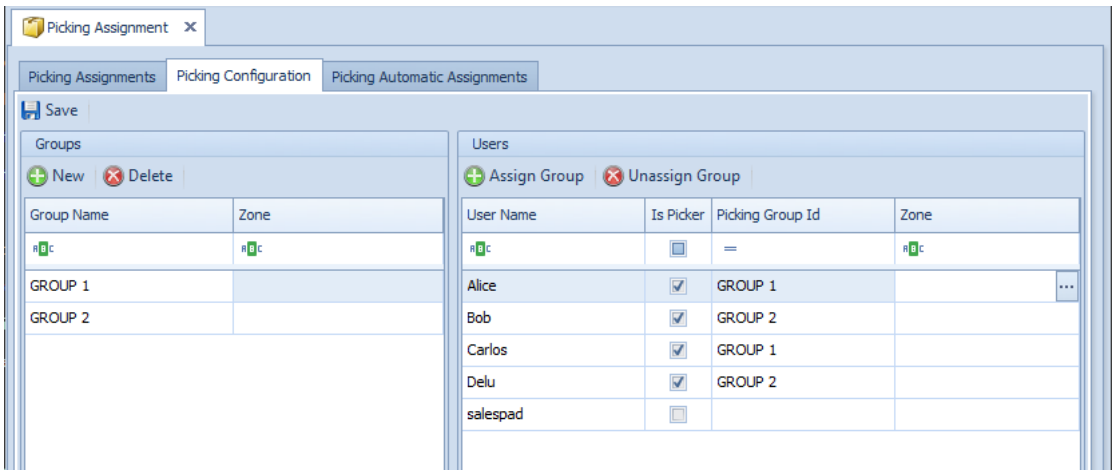
Any bin that will be used for Zone Picking must be assigned to a zone. It is not required to assign bins to zones if they will not be used for Zone Picking.

To assign a bin to a zone, open Warehouse Configuration and select a warehouse and then a bin. In the Zone field, select a zone from the field's dropdown. To assign the bin to a new zone, simply type the zone into the field instead of selecting from the list. When finished, click the Save button.

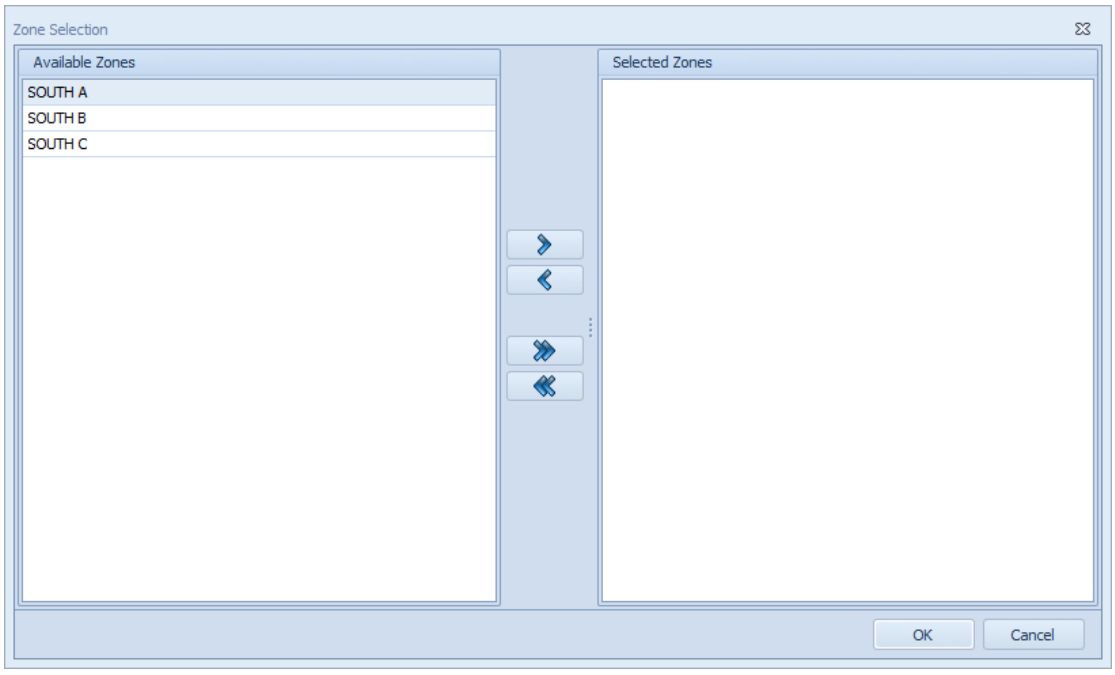


Picker Zone Assignment

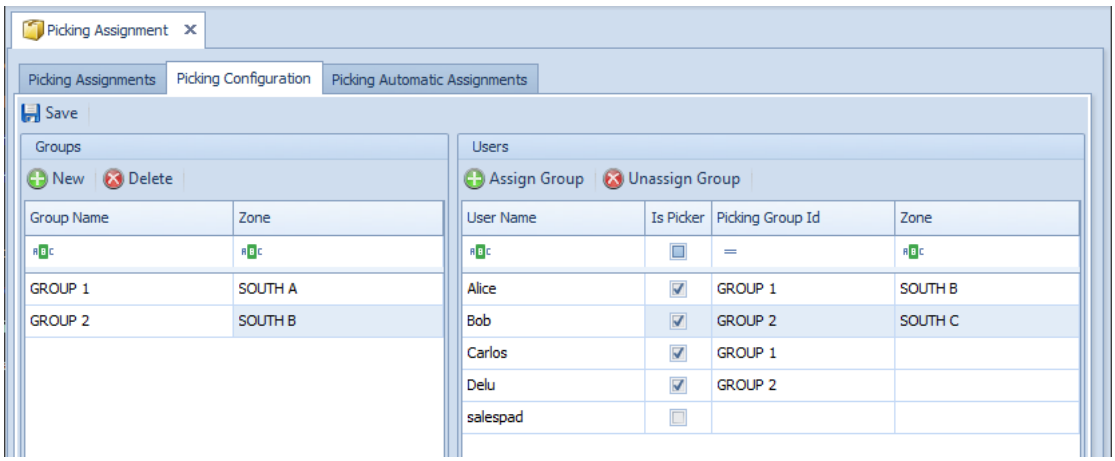
To assign a user to a zone, open Picking Assignment and select the Picking Configuration tab. In the Users grid, select the Zone cell for the user who should be assigned and then click the cell's ellipsis button.



This opens a popup for assigning zones to the selected user. The Available Zones list shows all of the zone options assigned to bins in the system. Select a zone and click the '>' button to assign it to the user. Repeat this to assign multiple zones to the user. To unassign a zone, select a zone in the Selected Zones list and click the '<' button. When done, click the 'OK' button to close the popup, and then click the 'Save' button on Picking Configuration.



Zones can be assigned to picking groups via the Groups grid's Zone column. All users who are in a picking group will have access to the group's assigned zones in addition to their own zones. In the following example, Bob would be able to pick in zones SOUTH B and SOUTH C because he is directly assigned to SOUTH C and his picking group is assigned to SOUTH B.



Tips

An item cannot be directly assigned to a zone. Instead, an item belongs to a zone if it has available quantity in a bin in that zone. Due to this, it is possible for an item to be available in multiple zones.

Cavallo recommends keeping each item within a single zone. This makes it safer and easier for multiple users in different zones to pick the same order at the same time. This is especially important when using Directed Picking serial or lot priorities, because they can suggest serial-tracked and lot-tracked items in zones which do not have the warehouse's highest priority serials and lots.

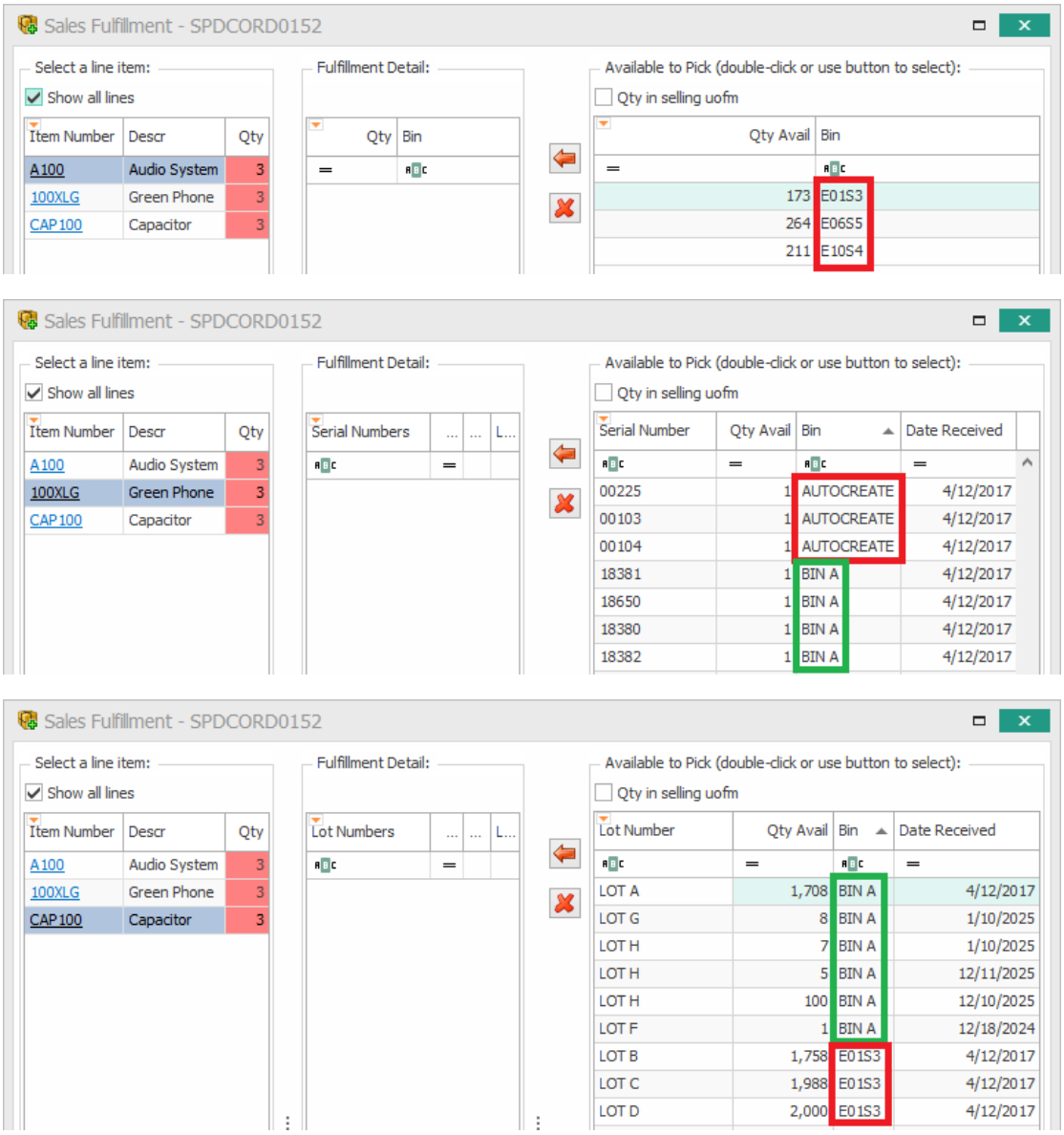
Mobile Zone Picking

The Picking and Batch Picking modules in the mobile app support Zone Picking. This section of the documentation will focus on Picking.

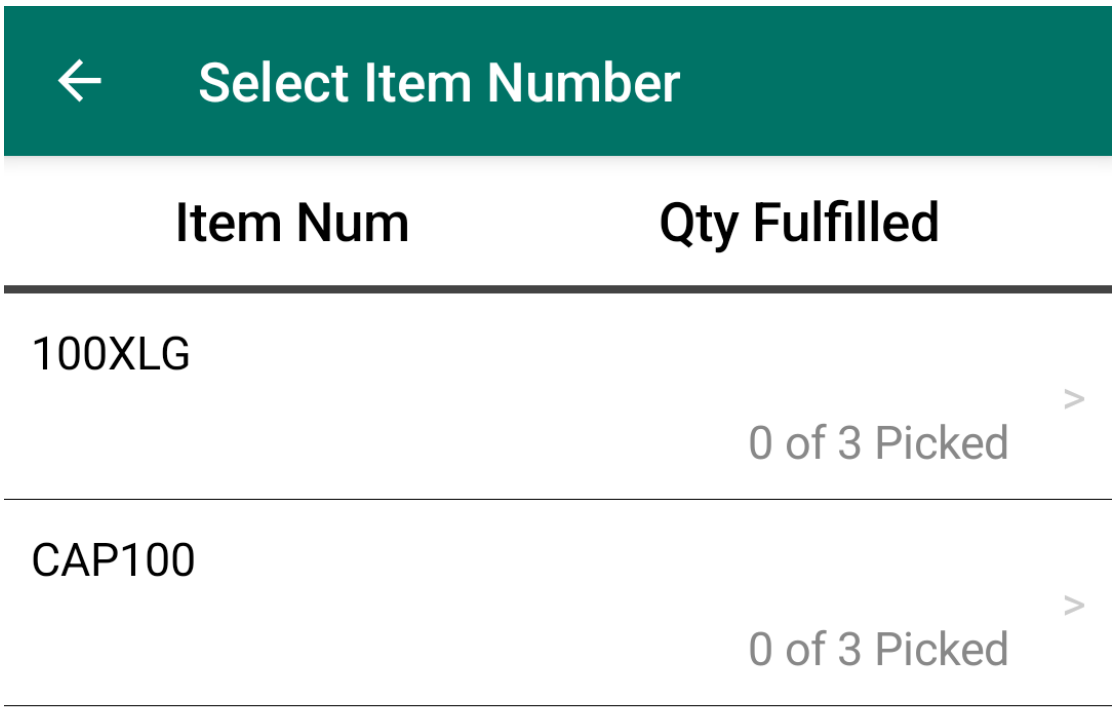
If a user is assigned to at least one zone, Inventory Manager will prevent that user from picking inventory which is not within those zones. Various lookups take this into account and will not display items and orders which cannot be picked due to not having any inventory within the user's zones. Likewise, scanning or typing in an item or order which cannot be picked due to Zone Picking restrictions will prevent the action and show an error.

In the following example, a user is assigned to ZONE NW which contains 2 bins: BIN A and BIN B. Order SPDCORD0152 has 3 line items: A100, 100XLG,

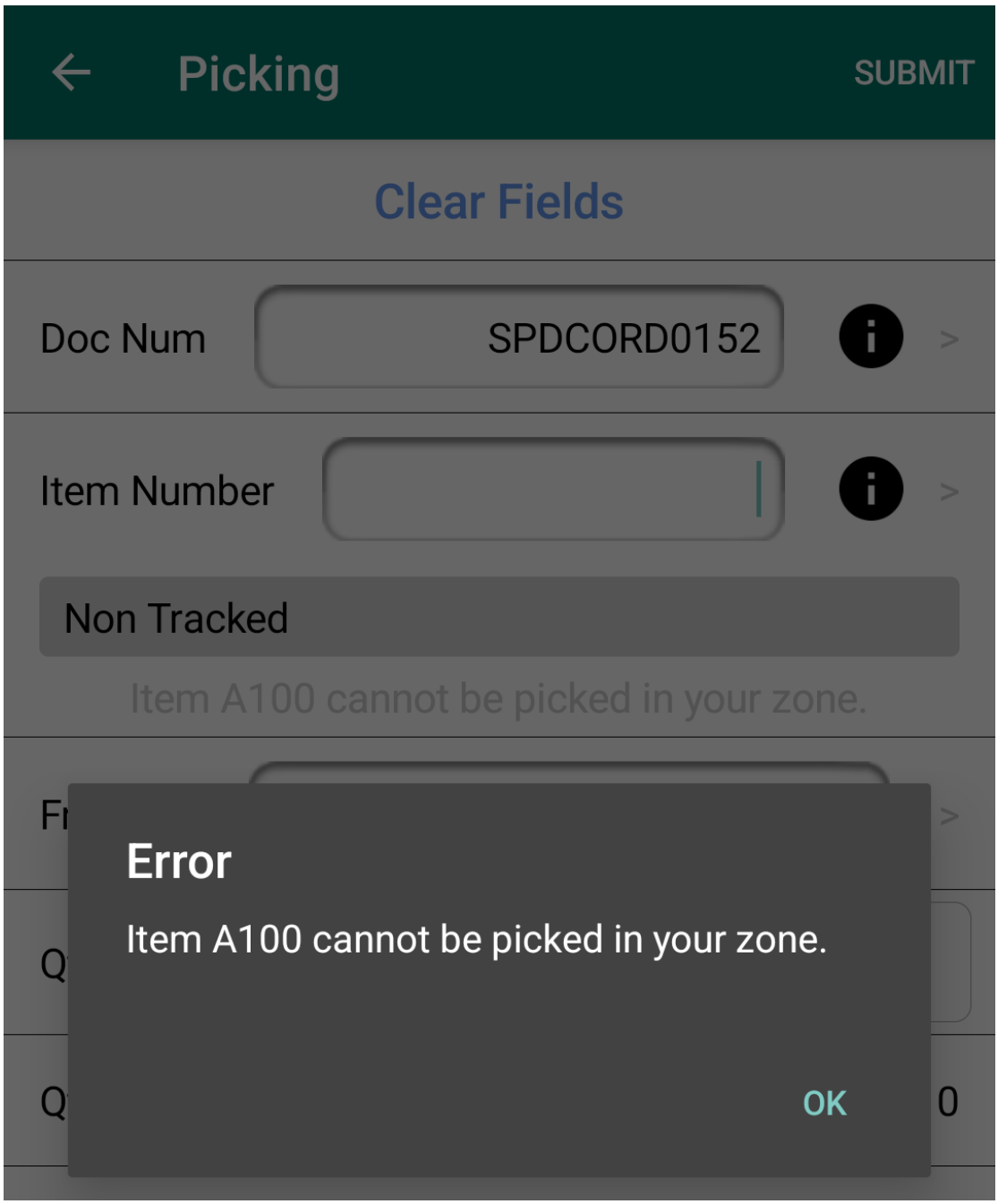
and CAP100. A100 is not available in ZONE NW. 100XLG is a serial-tracked item which has some serials available in ZONE NW and other serials in other zones. CAP100 is a lot-tracked item which has some lots available in ZONE NW and other lots in other zones.



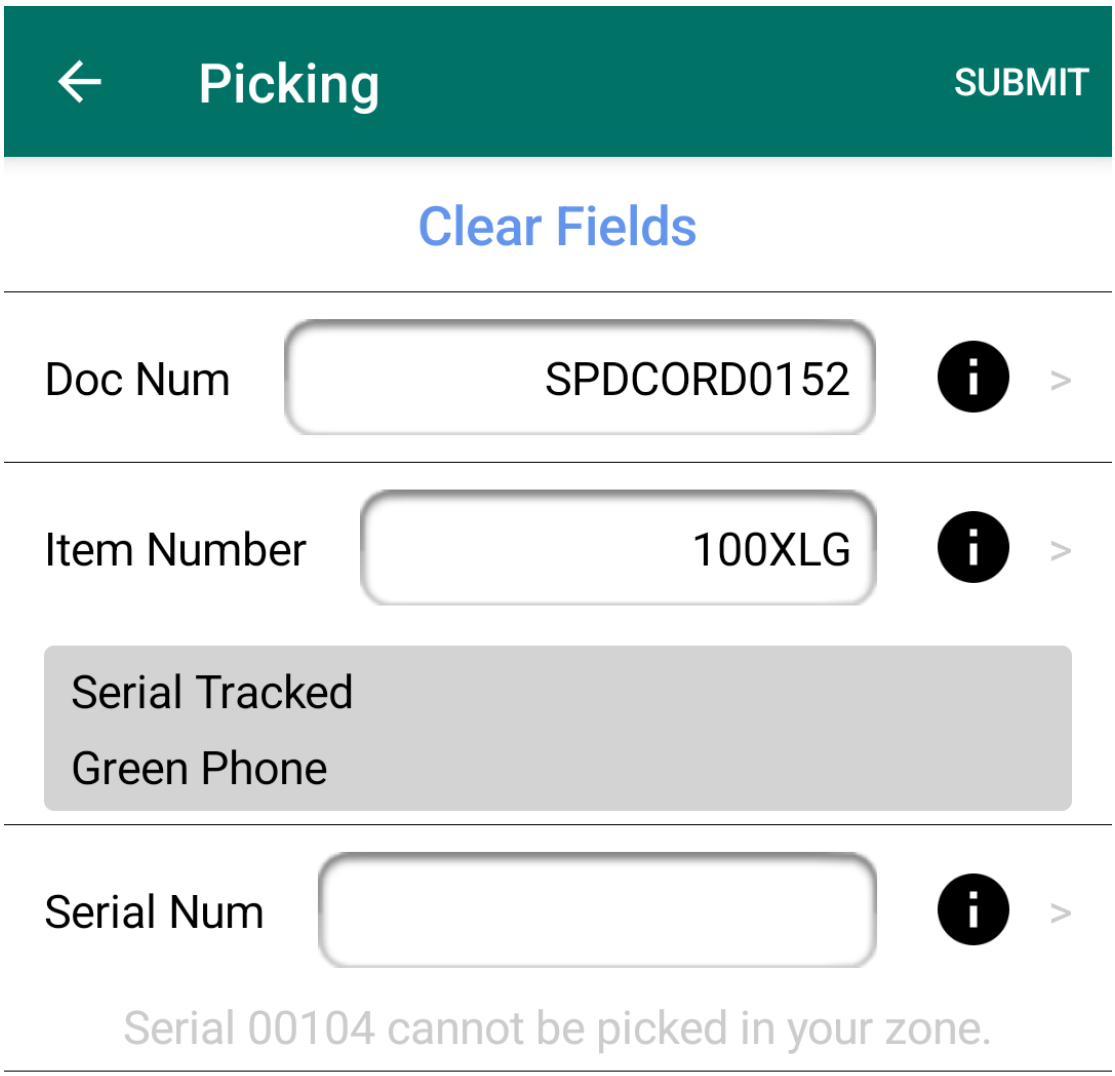
When that user tries to pick this order in the mobile app's Picking module, it will appear in the Doc Num lookup because it has at least one pickable item. However, the Item Number lookup will exclude A100 because that item is not pickable within the user's zone.



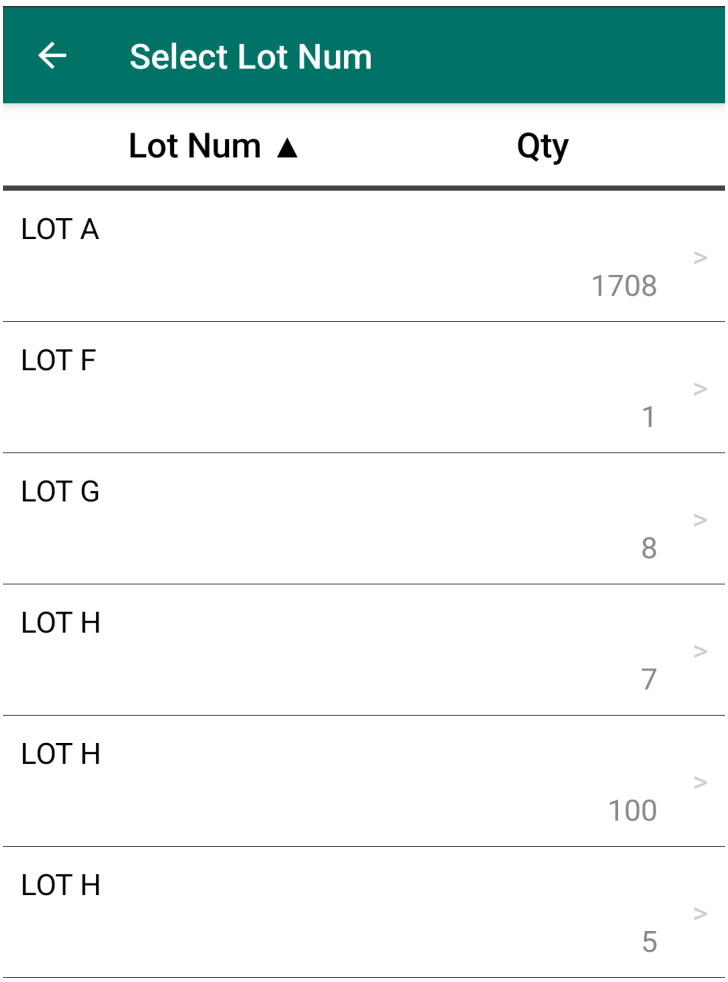
If the user scans A100 into the Item Number field, they will see an error stating that the item cannot be picked in their zone.



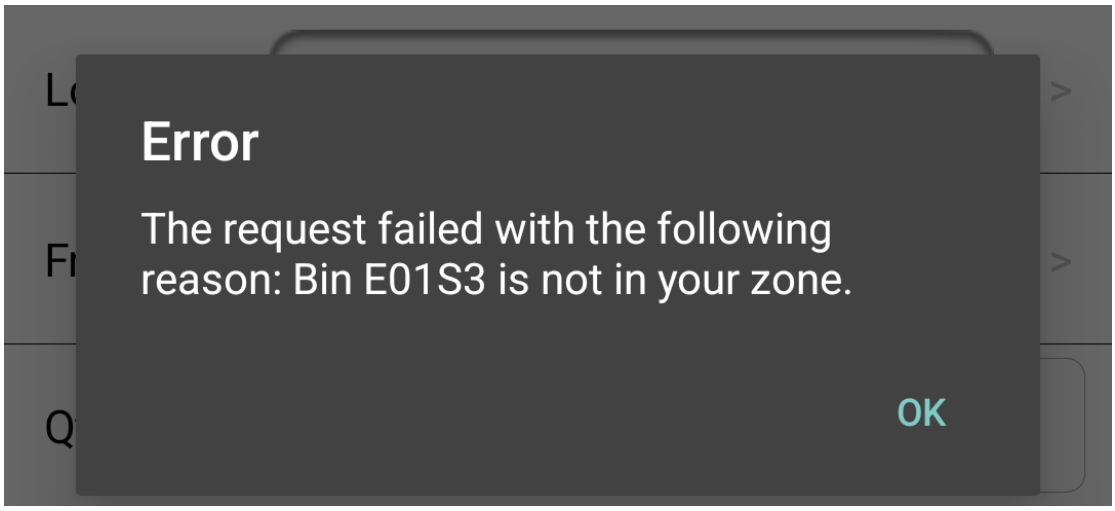
If the user starts picking a serial-tracked item, the Serial Num lookup will only show serials which are in bins within the user's zone. If the Validate Serial Numbers setting is set to True, scanning or typing in a serial number outside the user's zone will immediately show an error. Otherwise, the app will show any errors for entered serial numbers when the pick is submitted.



If the user starts picking a lot-tracked item, the Lot Num lookup will only show lots which are available in bins within the user’s zone.

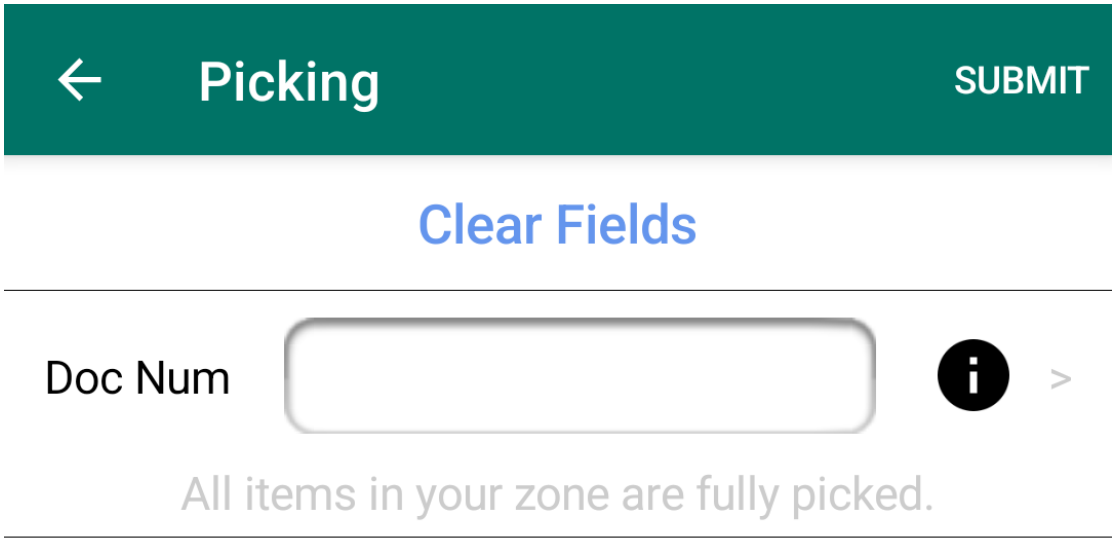


The From Bin lookup only shows bins within the user's zone. If the user scans or types in a bin outside their zone, they will see an error when submitting the transaction.

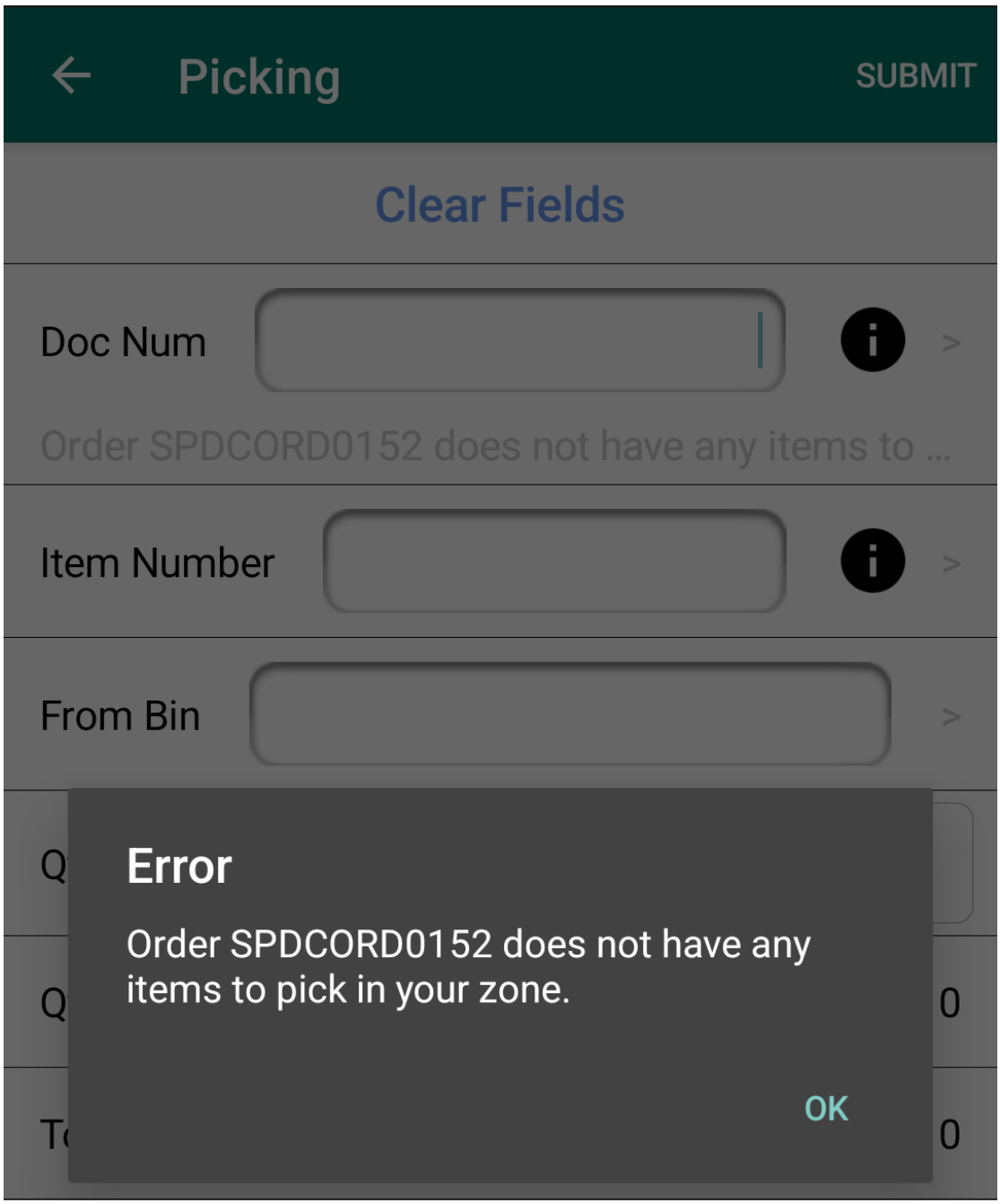


Once the user fully picks all items in their zone, the app will inform the user and clear the Doc Num field. The order will only automatically forward in

workflow or move to the Pick Finished Batch if the order is now fully picked.



Since the user cannot pick anything else on the order, the app will now hide the order from the Doc Num lookup. Likewise, scanning or typing the order into the Doc Num field will show an error.



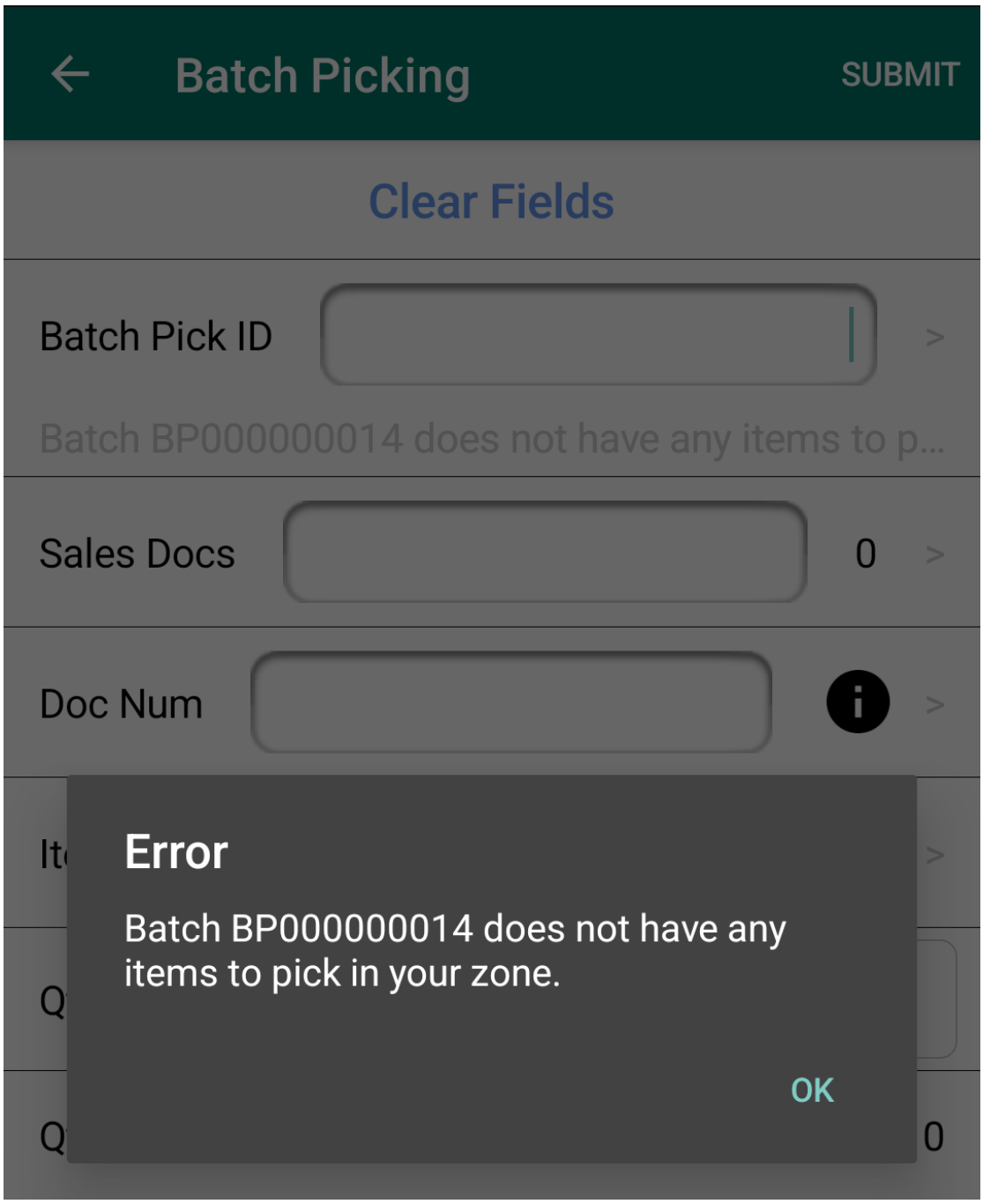
Another user in a different zone would then pick the remaining line items. Once that user picks the rest of the order, the app will automatically forward it in workflow or move it to the Pick Finished Batch if configured to do so.

With Batch Picking

Batch Picking's Doc Num, Item Number, Serial Num, Lot Num, and From Bin fields all respect Zone Picking in the same ways as Picking. Their lookups do not display orders, items, and other data which cannot be picked due to

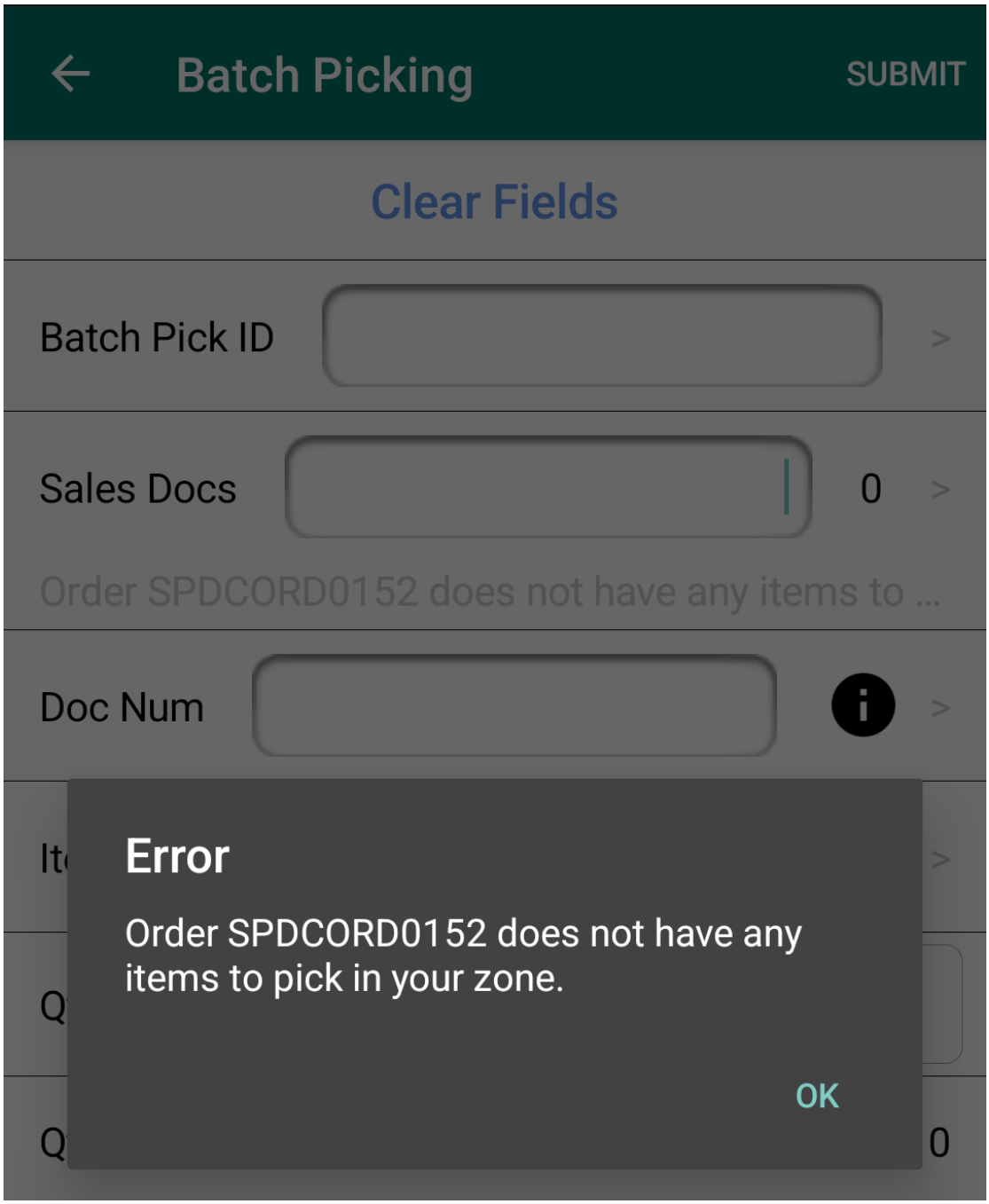
not having any inventory within the user's zones. Likewise, scanning or typing in any of those excluded rows will give an error either right away or when submitting the pick.

The Batch Pick ID field also supports Zone Picking. If a batch's unpicked items have no quantity available within a user's zone, the Batch Pick ID lookup will not display that batch to that user. If the user tries to scan or type in that batch, the app will display an error.



While a batch is not selected, the Sales Docs field works similarly to

Picking's Doc Num field. Its lookup will only show orders which the current user can pick within their assigned zone, and the app will show an error if the user scans or types in an order outside their zone.



While a batch is selected, the Sales Docs field is read-only and the lookup displays all of the orders in the batch regardless of which zones the orders are pickable in, so that the user can see all relevant sales orders even if they cannot pick items for those orders. Likewise, the To Bin field does not restrict based on zone, because Batch Picking's To Bin is intended to be a

staging area which all users can access.

With Directed Picking

Sales Document Priorities, Bin Priorities, Serial Priorities, and Lot Priorities all respect Zone Picking. They will never suggest a sales document, bin, item, serial, or lot which is not pickable within the user’s assigned zones.