

# PLANNING - ROUTE PICK-LIST

## What is the Route Pick-List?

A pick-list shows the stock items an operator will need to complete their scheduled route.

## Restricted Access

This area requires a **Planning** or **Finance** license to access.

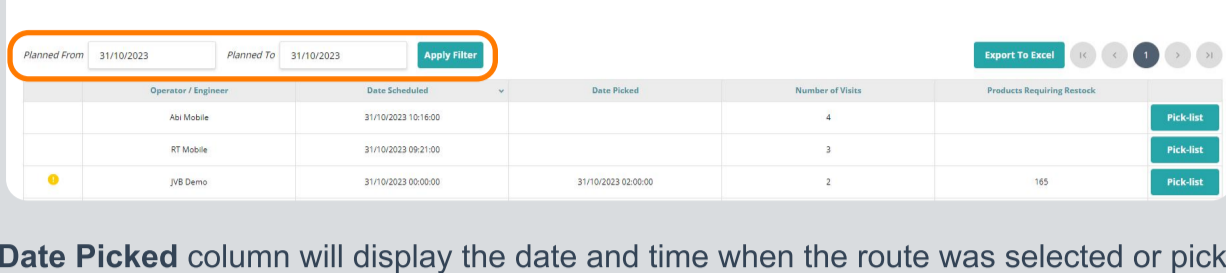
**Users, Super Users, Owners** and **Internal Users** can view the data within this area.

## Navigating the Route Pick-List

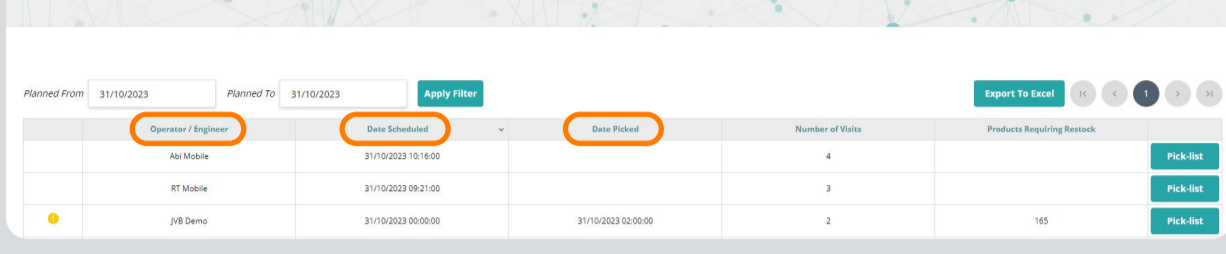
In SmartVend, under the **Planning** header in the main menu, you will find the **Route Pick-List**.

On this screen, you have a date picker that allows you to focus on scheduled routes within a specific date range. After applying the filter, the list of Operators or Engineers in the table will update accordingly.

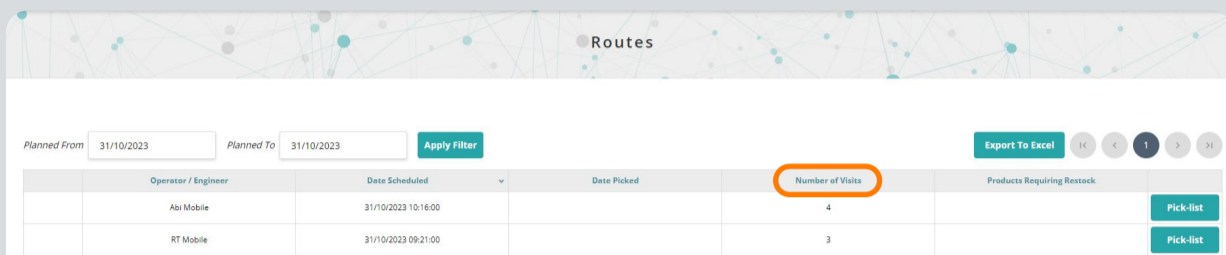
By default, the date picker is set to show routes scheduled for the next 7 days.



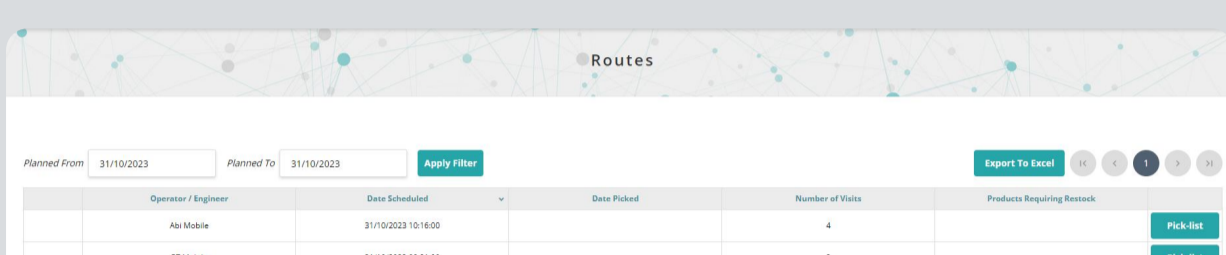
The **Date Picked** column will display the date and time when the route was selected or picked.



The **Number of Visits** column in the table indicates the total number of stock visits that the operator needs to complete as part of the scheduled route.

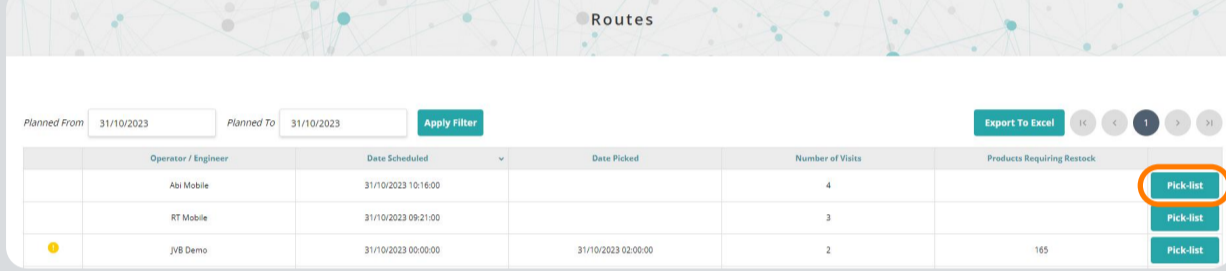


The **Products Requiring Restock** column displays the number of items that need to be added to the operator's default stock location to complete the route. If the stock at the location is insufficient to fulfil the route requirements, an indication will be provided to alert you of this issue.



## Generating Pick-List

To generate or view a pick-list, select **'Pick-List'** next to the route you wish to view. This action will create or display the pick-list for the selected route, detailing the stock items needed for completion.



If the route has not been picked, you will receive a notification prompting whether you wish to pick it now.

- Selecting **'Ok'** will generate the pick-list for the route.
- Selecting **'Cancel'** will return you to the route pick-list screen without making any changes.

## Training Note

**Telemetry machines** update their stock levels based on real-time telemetry data, which reflects current stock levels as influenced by sales.



**Non-telemetry machines**, however, calculate stock levels based on data from stock visits conducted over the past 90 days, relying on recorded product quantities from these visits.

## Viewing Pick-List By Product or By Machine

Once you drill down into the pick-list, you can choose to view it either **By Product** or **By Machine**.

- **By Product:** This view organises the pick-list by individual products, detailing the quantities needed for each product across different routes or machines.
- **By Machine:** This view organises the pick-list by machine, showing the stock requirements for each machine, including the specific products and quantities needed.



In the **By Product** view of the pick-list:

- **Product List:** Displays all products required for the route, including details such as Product Name, SKU, and Case Size.
- **Stock Needed:** Shows a consolidated list of stock required, broken down into Cases and Singles.
- **Difference:** Indicates the additional stock needed to complete the route, displayed in Cases and Singles.
- **Indication Icon:** If there is insufficient stock to complete the route, an icon will appear beside each product to highlight this issue.



In the **By Machine** view of the pick-list:

- **Machine Details:** Displays the Machine Name, Machine Reference, and whether the machine is Telemetry or Non-Telemetry.
- **Product List:** Shows the products required for each machine, including the Product Name and SKU.
- **Items Required:** Lists the number of individual items needed, recorded in singles.
- **Cases Required:** Shows the number of cases needed, along with the Case Size of each product.

Machine Name	Machine Reference	Telemetry / Non-Telemetry	Pastebin	Product Name	Product SKU	Items Required	Cases Required	Case Size
Warner Machine 013	VNET013	Telemetry	7518 3HR	Espresso	81000203	10	10	1
Warner Machine 013	VNET013	Telemetry	7518 3HR	Syrup Shot	81000279	12	12	1
<b>Total (VNET013)</b>						<b>22</b>	<b>22</b>	
Warner Machine 014	VNET014	Telemetry	7524 705	Espresso	2	5	0	28
Warner Machine 014	VNET014	Telemetry	7524 705	Risotto	810002616	12	12	1
Warner Machine 014	VNET014	Telemetry	7524 705	Espresso	810002623	17	17	1
Warner Machine 014	VNET014	Telemetry	7524 705	Hot Water	810002670	12	12	1
Warner Machine 014	VNET014	Telemetry	7524 705	Espresso large	81000232	12	12	1
Warner Machine 014	VNET014	Telemetry	7524 705	Espresso Macchato	81000233	12	12	1
Warner Machine 014	VNET014	Telemetry	7524 705	Espresso Macchato large	81000234	12	12	1

If there is not enough stock to complete the route, an indication icon will appear beside the product. This icon alerts you to potential stock shortages and helps you identify which products need to be addressed before the route can be completed.

Product Name	Product SKU	Case Size	Stock Needed		Location Quantity		Cases Required	Difference
			Cases	Singles	Cases	Singles		
Americano	10	28	1	2	0	0	-1	-2
Hot Water	11	0	30	0	0	0	-30	0
Espresso	2	28	1	2	0	0	-1	-2
Kaffa	3	1	30	0	0	0	-30	0
Hot water	4	1	30	0	0	0	-30	0
Melgostem vullen	5	1	30	0	0	0	-30	0
Café au lait	6	1	30	0	0	0	-30	0
Capuccino	7	1	30	0	0	0	-30	0
Double espresso	8	1	30	0	0	0	-30	0
Espresso	9	1	30	0	0	0	-30	0

## Training Note

The system automatically generates the pick-list for the route at 2 AM UTC on the scheduled date if it has not been picked prior to this time. This ensures that pick-lists are prepared in advance, even if the route has not been manually picked.

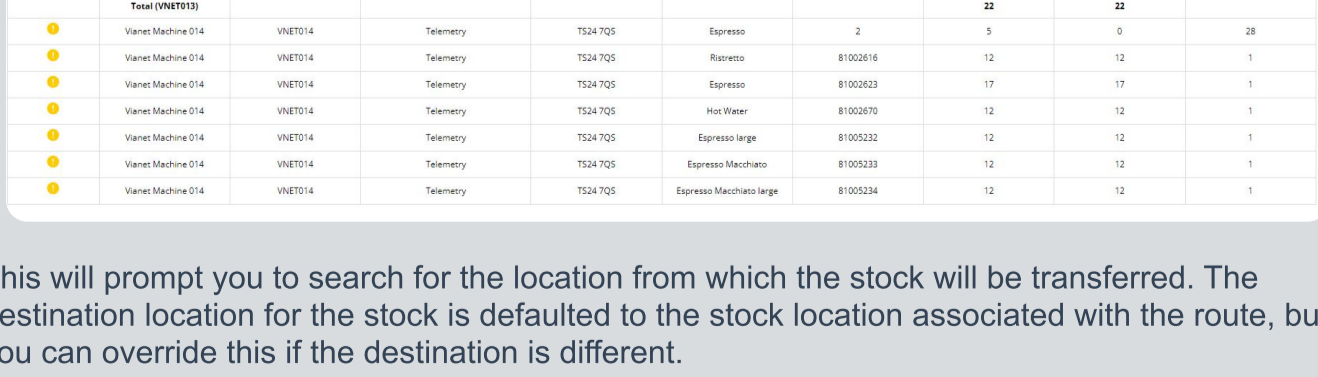


## Add Stock Transfer From Pick-List

**Note:** This area requires a Stock license to access.

If you do not have enough stock to complete a route and need to arrange a stock transfer, you can do this from the Pick-List screen.

To add a stock transfer, select **'Add Stock Transfer'** on the right-hand side of the screen.



This will prompt you to search for the location from which the stock will be transferred. The destination location for the stock is defaulted to the stock location associated with the route, but you can override this if the destination is different.

You can search for locations by Location Reference, Name, or Type in both fields.

Once you have selected the appropriate locations, click **'Add'** to proceed.

