

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 **Route Pick-List**.

On this screen, you have a date picker, which allows you to focus on scheduled routes between a date range. When you apply the filter, the list of **Operator / Engineer** in the table will update.

As a default, the date picker will be set to 7 days in the future.

Routes					
Planned From	31/10/2023	Planned To	31/10/2023	Apply Filter	Export To Excel
	Operator / Engineer	Date Scheduled	Date Picked	Number of Visits	Products Requiring Restock
	Ali Mobile	31/10/2023 10:16:00		4	
	RT Mobile	31/10/2023 09:21:00		3	
	J/B Demo	31/10/2023 00:00:00	31/10/2023 02:00:00	2	165

The **Date Picked** column will be populated with the date and time the route is picked.

Routes					
Planned From	31/10/2023	Planned To	31/10/2023	Apply Filter	Export To Excel
	Operator / Engineer	Date Scheduled	Date Picked	Number of Visits	Products Requiring Restock
	Ali Mobile	31/10/2023 10:16:00		4	
	RT Mobile	31/10/2023 09:21:00		3	
	J/B Demo	31/10/2023 00:00:00	31/10/2023 02:00:00	2	165

The **Number of Visits** displayed in the table is how many stock visits the operator is required to complete in the scheduled route.

Routes					
Planned From	31/10/2023	Planned To	31/10/2023	Apply Filter	Export To Excel
	Operator / Engineer	Date Scheduled	Date Picked	Number of Visits	Products Requiring Restock
	Ali Mobile	31/10/2023 10:16:00		4	
	RT Mobile	31/10/2023 09:21:00		3	
	J/B Demo	31/10/2023 00:00:00	31/10/2023 02:00:00	2	165

The **Products Requiring Restock** displays the required number of items needed to be added to the operators default location to allow them to complete the route.

If the Location does not have enough stock to complete the route, you can view a indication.

Routes					
Planned From	31/10/2023	Planned To	31/10/2023	Apply Filter	Export To Excel
	Operator / Engineer	Date Scheduled	Date Picked	Number of Visits	Products Requiring Restock
	Ali Mobile	31/10/2023 10:16:00		4	
	RT Mobile	31/10/2023 09:21:00		3	
	J/B Demo	31/10/2023 00:00:00	31/10/2023 02:00:00	2	165

Generating Pick-List

To generate, or view, a pick-list, you need to select '**Pick-List**' against the route that you wish to view.

Routes					
Planned From	31/10/2023	Planned To	31/10/2023	Apply Filter	Export To Excel
	Operator / Engineer	Date Scheduled	Date Picked	Number of Visits	Products Requiring Restock
	Ali Mobile	31/10/2023 10:16:00		4	
	RT Mobile	31/10/2023 09:21:00		3	
	J/B Demo	31/10/2023 00:00:00	31/10/2023 02:00:00	2	165

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

Selecting '**Ok**' will generate the pick-list, while selecting '**Cancel**' will return you to the route pick-list screen with no changes made.

Viewing Pick-List By Product or By Machine

Once you drilldown into the pick-list, you can view this **By Product** or **By Machine**.

Pick-list									
By Product	By Machine	Export To Excel	1	2	3	4	5	6	Add Stock Transfer

By Product shows a list of all of the products required - with the **Product Name**, **SKU** and **Case Size** displayed - with a consolidated list of the **Stock Needed** broken down by Cases and Singles.

The **Difference** shows the stock that is required to be added to the location to enable you to complete the route in Cases and Singles. If there is not enough stock to complete the route, you can view an indication icon beside each product.

Pick-list									
By Product	By Machine	Export To Excel	1	2	3	4	5	6	Add Stock Transfer

By Machine shows a list of the products required by each machine. Within the Pick-list table, you will be able to view the **Machine Name**, **Machine Reference**, and whether the machine is **Telemetry / Non-Telemetry**.

Within this list, you can view the **Product Name**, and **SKU** and provides you with the number of **Items Required**, which is recorded in singles.

You can then view the number of **Cases Required**, and the **Case Size** of the product.

Export To Excel									
Machine Name	Machine Reference	Telemetry / Non-Telemetry	Postcode	Product Name	Product SKU	Items Required	Cases Required	Case Size	
Vianet Machine 013	VNET013	Telemetry	T518 3HR	Espresso	B1002623	10	10	1	
Vianet Machine 013	VNET013	Telemetry	T518 3HR	Syrup Shot	B1005275	12	12	1	
Total (VNET013)						22	22		
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Espresso		2	0	28	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Richesto	B1002616	12	12	1	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Espresso	B1002623	17	17	1	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Hot Water	B1002670	12	12	1	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Espresso large	B1005232	12	12	1	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Espresso Macchiato	B1005233	12	12	1	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Espresso Macchiato large	B1005234	12	12	1	

If there is not enough stock to complete the route, you will receive an indication icon beside the product.

	Product Name	Product SKU	Case Size	Stock Needed		Location Quantity		Difference	
				Cases	Singles	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
	Koffie	3	1	30	0	0	0	-30	0
	Hete melk	4	1	30	0	0	0	-30	0
	Melkpoetsen vullen	5	1	30	0	0	0	-30	0
	CaFé au lait	6	1	30	0	0	0	-30	0
	Cappuccino	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 2am UTC on the scheduled date, if it has not been picked prior to this.



Add Stock Transfer From Pick-List

N.B: This area requires a Stock license allocated for access

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

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

Export To Excel									
Machine Name	Machine Reference	Telemetry / Non-Telemetry	Postcode	Product Name	Product SKU	Items Required	Cases Required	Case Size	
Vianet Machine 013	VNET013	Telemetry	T518 3HR	Espresso	B1002623	10	10	1	
Vianet Machine 013	VNET013	Telemetry	T518 3HR	Syrup Shot	B1005275	12	12	1	
Total (VNET013)						22	22		
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Espresso		2	0	28	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Richesto	B1002616	12	12	1	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Espresso	B1002623	17	17	1	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Hot Water	B1002670	12	12	1	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Espresso large	B1005232	12	12	1	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Espresso Macchiato	B1005233	12	12	1	
Vianet Machine 014	VNET014	Telemetry	T524 7Q5	Espresso Macchiato large	B1005234	12	12	1	

This will then allow you to search for a Location that the stock is to come from. The Location that the stock is to go to is defaulted to the stock location of the route, but this can be overwritten if it's not in the correct location.

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

Once you have selected the locations, you can select '**Add**'.

Add Stock Transfer

Select Location to Transfer From

Search

Select Location to Transfer To

Vianet Van 5, Vianet Van 5

AddCancel