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.
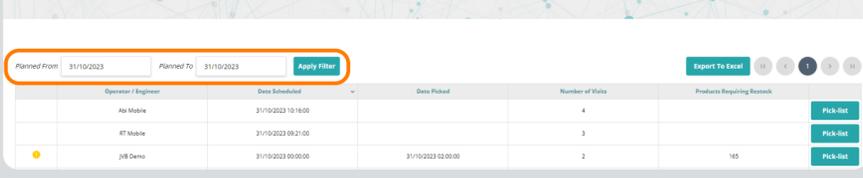
Users, **Super Users**, **Owners** and **Internal Users** can view the data within this area.
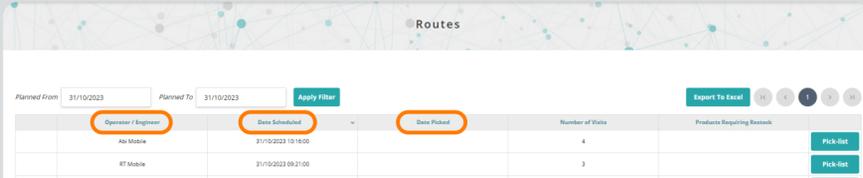
Navigating the Route Pick-List

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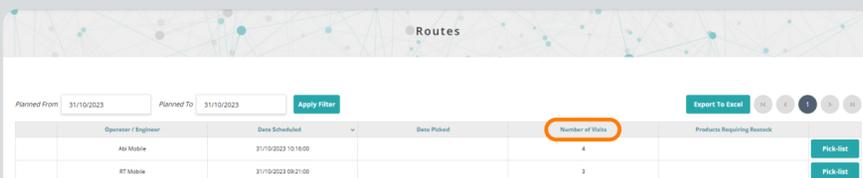
As a default, the date picker will be set to 7 days in the future.

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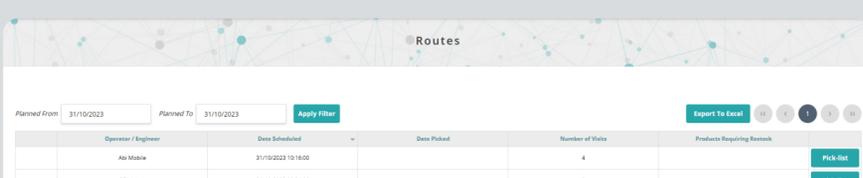

The **Number of Visits** displayed in the table is how many stock visits the operator is required to complete in the scheduled route.
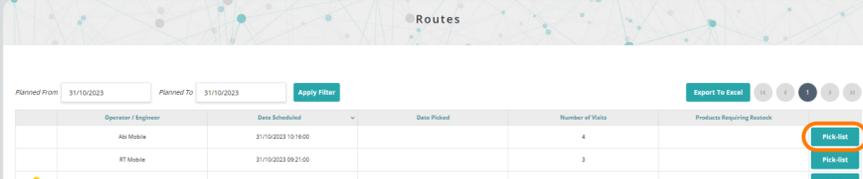

The **Products Requiring Restock** displays the required number of items needed to be added to the operators default location to allow them to complete the route.

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

Generating Pick-List

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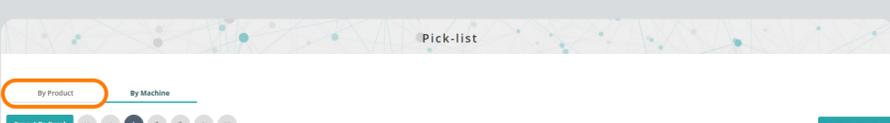

If the route has not been picked, you will receive a notification asking if you wish to pick it now.

Selecting '**Ok**' will generate the pick-list, while selecting '**Cancel**' will return you to the route pick-list screen with no changes made.
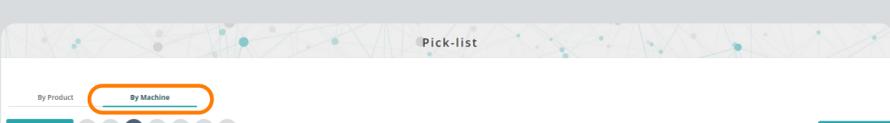
Viewing Pick-List By Product or By Machine

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

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.

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.

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

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.

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**'.