# Purpose

This procedure has been developed to provide you with an understanding of how to create picking lists and manage picking and packing documents in the NAXT system.

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# Prerequisite

A sales order or transfer order with items ready for picking and packing

# Terminology

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| **Backorder item** | The part will need to be sourced from the vendor or another warehouse |
| **Delivery note** | The delivery note is often called a packing slip |
| **OWM** | Outside Working Materials – outwork on a service call |
|  | List of parts to pick for dispatch and where to source those parts |
|  | If any parts are on back order using this function will automatically create the PO. If any parts can be sourced from another warehouse this function will automatically create the transfer order |
|  | Journal states where parts are located and how much stock is on record for each part |
|  | List of each parts, it’s quantity and location. You can select the parts from here |
|  | After entering the quantity required, this pushes the quantities into the ‘Pick now’ column |
|  | After picking, this pushes the quantities to the ‘Picked quantities’ column for use |
|  | Brings up the picked parts and prints on a delivery note |

# Use of icons

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|  | **Business rule** |  | **Key point / Tips** |  | **Information** |

1. Find picking journals

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| 1. Navigate to:   **GGNZ > Warehouse management system > Journals > Picking > Picking journal** |
| 1. Filter for **Status** **‘!finished’** to find open picking journals to process |

1. Create a picking journal for a sales order

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| Once a sales order has been created, a picking journal needs to be produced so you know whether the parts required are in stock and what location/bin you can source them from. |
| 1. To open the required Sales order, navigate to:   **GGNZ > Sales and marketing > Common > Sales orders > All sales orders** |
| 1. Double-click the sales order   The **Sales order** window displays  C:\Users\johi\AppData\Local\Temp\SNAGHTML13abb2a.PNG |
| 1. To show prices on a packing slip:    1. Select **Header view** button    2. Expand **Setup** fast tab    3. Check the **Print price information on packing slip** checkbox is ticked |
| 1. If the parts are in the same warehouse, select **Pick and pack > Picking journal**   An **Infolog** will display advising that the picking journal has been created  C:\Users\johi\AppData\Local\Temp\SNAGHTML13b803c.PNG |
| 1. Highlight **‘Picking journal created:’** line 2. Select **Show**   The **Picking journal** window will display | |
| **10D Transpecs only**: refer to Task 7 | | |
| 1. Select **Picking list pro voucher** button   A Picking Journal document will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML14e3346.PNG | | |
| 1. Print if required 2. Select **Close**   C:\Users\johi\AppData\Local\Temp\SNAGHTML153d79f.PNG | | |

1. Pick and pack a sales order

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| 1. Open the sales order (see **Task 1**)   The **Sales order** window displays |
| 1. Select **Pick and pack > Picking journal**   The **Picking journal** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML13b803c.PNG |
| **10D Transpecs only**: refer to Task 7 |
| 1. Select **Pick**   The **Pick** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML155bfcc.PNG |
| 1. *Either:*  * Select **Pick all** to pick all in the **Pickable** field,   *Or*   * Enter the amount to pick in the **Pick now** field for each line   The **Pick now** field will be updated  C:\Users\johi\AppData\Local\Temp\SNAGHTML15aea55.PNG | |
| 1. Select **Apply**   The **Picked quantity** field will be updated  C:\Users\johi\AppData\Local\Temp\SNAGHTML15bbdf8.PNG | |
| 1. Select **Close**   The **Picking journal** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML15d1d27.PNG | |
| 1. Select **Picked**   The **Change of status** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML15db59f.PNG | | |
| 1. Select **OK**   A notification will display asking if you want to print a packing slip | | |
| 1. Select **Yes**   The **Packing Slip** will display | | |
| 1. Print if required 2. Select **Close**   The **Picking journal** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML15ff76f.PNG | | |
| 1. Select **Close**   The **Sales order** window will display with an updated **Status** of **‘Delivered’**  C:\Users\johi\AppData\Local\Temp\SNAGHTML16495b0.PNG | | |

1. Create a picking journal for a transfer order

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| 1. To open the Transfer orders screen, navigate to:   **GGNZ > Inventory and warehouse management > Periodic > Transfer orders** |
| 1. Highlight the required Transfer order 2. Select **Picking journal**   An **Infolog** will display advising that the picking journal has been created  C:\Users\johi\AppData\Local\Temp\SNAGHTML16e9285.PNG |
| 1. Highlight the **‘Picking journal created:’** line 2. Select **Show**   The **Picking journal** window will display | |
| **10D Transpecs only:** refer to Task 7 | |
| 1. Select **Picking list pro-voucher** button   A Picking Journal document will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML179ee0d.PNG | |
| 1. Print if required 2. Select **Close**   C:\Users\johi\AppData\Local\Temp\SNAGHTML17a7dbe.PNG | |

1. Pick and pack a transfer order

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| 1. To open the Transfer orders screen, navigate to:   **GGNZ > Inventory and warehouse management > Periodic > Transfer orders** |
| 1. Highlight the required Transfer order 2. Select **Picking journal**   The **Picking journal** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML16e9285.PNG |
| **10D Transpecs only:** refer to Task 7 |
| 1. Select **Pick**   The **Pick** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML1843837.PNG |
| 1. *Either:*  * Select **Pick all** to pick all in the **Pickable** field,   *Or*   * Enter the amount to pick in the **Pick now** field for each line   The **Pick now** field will be updated  C:\Users\johi\AppData\Local\Temp\SNAGHTML184e8d0.PNG |
| 1. Select **Apply**   The **Picked quantity** field will be updated  C:\Users\johi\AppData\Local\Temp\SNAGHTML1864e17.PNG |
| 1. Select **Close**   The **Picking journal** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML18722c3.PNG |
| 1. Select **Picked**   A **Change of status** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTML187eaf2.PNG |
| 1. Select **OK** |
| If the transfer order is linked to a sales order a message will display asking if you want to print a pro-forma packing slip. |
| 1. If you would like to print a pro-forma packing slip, select **Yes**   The **Packing Slip** document will display |
| 1. Print if required   C:\Users\johi\AppData\Local\Temp\SNAGHTML15ff76f.PNG |
| 1. Select **Close**   The **Transfer journal** window will display - the Transfer journal will have a new **Transfer status** of **‘Shipped’**  C:\Users\johi\AppData\Local\Temp\SNAGHTML176911f.PNG |
| 1. If the transfer order is not linked to a sales order you will need to complete the following steps to print a Stock Transfer Order from the Overview Screen:    1. Highlight the transfer order    2. Select **Print > Transfer overview**   The **Transfer overview** window will display  C:\Users\johi\AppData\Local\Temp\SNAGHTMLc12639.PNG | |
| Stock Transfer Orders need to be printed and included with the items being shipped so that the receiving branch can identify the transfer order related to the items in the shipment. It also includes the receiving branches address which you will need for shipping (unless using FMS). | |
| 1. Select **OK**   The Stock Transfer Overview will display | |
| 1. Print 2. Select **OK**   C:\Users\johi\AppData\Local\Temp\SNAGHTML193eff1.PNG | |

1. Create a delivery note for a picked order

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| If you had picked the part from the sales order lines, you will need to manually print the delivery note. |
| 1. Navigate to:   **GGNZ > Sales and marketing > Common > Sales orders > All sales orders**  The **All sales order** window will display |
| 1. Double click on the sales order to open it   C:\Users\johi\AppData\Local\Temp\SNAGHTML83584f.PNG |
| 1. To generate a packing slip, select **Pick and pack > Delivery note**   The **Delivery note posting** window displays  C:\Users\johi\AppData\Local\Temp\SNAGHTMLa06e7e.PNG |
| 1. Complete the following fields:    1. **Quantity** Select **‘All’**    2. **Print delivery note** Select    3. **Print price information** Deselect if you don’t want to see pricing information |
| 1. Select **OK** |
| If the sales order is for a service call you need to delete any OWM lines from the delivery note. |
| 1. In the **Lines** fast tab, highlight any OWM lines 2. Select **Delete**   C:\Users\johi\AppData\Local\Temp\SNAGHTMLc69907.PNG |
| 1. Select **OK**   A notification will display advising that you are printing to the screen only (not to a printer or the customers email)  C:\Users\johi\AppData\Local\Temp\SNAGHTMLb1fe10.PNG |
| 1. Select **Yes**   A delivery note will display |
| 1. Print if required   C:\Users\johi\AppData\Local\Temp\SNAGHTMLcc16fd.PNG |
| 1. Select **Close**   The **Sales order** window will display with the **Generate** **Delivery note** button no longer available |

1. Picking journals for warehouse 10D

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| Due to special requirements regarding Transpecs Kits, the following steps are to be used by 10D employees only! |
| Once Picking Journal has been created it will reflect an approved status.  10D staff will be able to remove lines from the journal as required. |
| 1. Highlight line/s you want to delete (select checkbox next to each line) 2. Select **Remove**   C:\Users\StephC\AppData\Local\Temp\SNAGHTML126ccb6.PNG |
| For all Picking Journals, 10D will need to go through the below steps, whether lines have been removed or not. |
| 1. Select **Approve** 2. Select **OK**   C:\Users\StephC\AppData\Local\Temp\SNAGHTML13b148f.PNG |
| 1. Select **To be picked** 2. Select **OK**   C:\Users\StephC\AppData\Local\Temp\SNAGHTML13ff0e9.PNG |
| 1. Open Picking list pro-voucher 2. Pick orders as normal |

# What next?

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| Recover freight costs | *PRT\_5.4(SOP)Recover Freight* |
| Receive parts | *PRT\_5.3(SOP)Receive Parts into Stock* |
| Manage discrepancies | *PRT\_5.2(SOP)Manage Shipping Discrepancies* |