Phoenix Allocation Dashboards – Supervisor Guide

This guide is designed to train new supervisors on how to use the four allocation dashboards in Phoenix:

- **Main Allocation Dashboard**

- **EDI Allocation Dashboard**

- **Dropship Allocation Dashboard**

- **Rural Allocation Dashboard**

You'll learn:

- How orders flow through the system

- What each dashboard is used for

- How to allocate, split, and manage orders

- What the colours, icons, and buttons mean

- Best practices and exceptions

Shared Features Across All Dashboards

Column Structure

Each dashboard is split into **9 columns** (left to right):

1. **Unallocated**

2. **VAN - 06:00 am**

3. **NZC - 9:30 am**

4. **NZPOST - 10:00 am**

5. **NZC - 11:30 am**

6. **NZC - 1:30 pm**

7. **NZC - 3:30 pm**

8. **NZC - 5:30 pm**

9. **TOLL - 06:00 pm**

Understanding the Column Headers

- The **courier name** (NZC, NZPOST, TOLL, VAN) determines the **default courier** assigned when the order is allocated from that column.

- The **NZC time slots** (9:30–5:30) are only used as **guides** on the **Main Dashboard**, helping group orders by courier run times.

- **Times next to VAN, NZPOST, and TOLL are outdated and can be ignored**.

- On **EDI, Dropship, and Rural dashboards**, the NZC times are **not used** and **do not affect** allocation.

Unallocated (6 / 207)		VAN - 06:00 AM	NZC - 09:30 AM	NZPOST - 10:00 AM
NZC - 11:30 AM	NZC - 01:30 PM	NZC - 03:30 PM	NZC - 05:30 PM	TOLL - 06:00 PM

Order Containers

Orders from clinics appear as **movable boxes** (order containers) on their respective dashboards.

Which Dashboard Orders Go To:

Dashboard Receives Orders From

Main All standard clinic orders not handled elsewhere

EDI **Animates, PetStock, Pet.co.nz** (EDI customers only)

Dropship Orders fulfilled by external suppliers

Rural Orders flagged as rural (based on clinic or address)

Each container includes:

- **SVS Invoice #** (top left)

- **Lns**: Number of product types (lines)

- **Qty**: Total number of items in the order

- **Clinic name + address**

- **Finalised:** Date/time the order was completed + how it was placed (e.g., VetChannel, by staff)

- **Default:** The default courier (can be overridden by what column it's allocated from)

Order	Lns	Qty
#3465526	6	50

CareVets Hamilton Ltd - Chartwell
Lynden Court,Chartwell,HAMILTON

Finalised: **Today 4:42pm (VetChannel)**
Default: **NZC**

Interacting with Order boxes

Double-Click to View Order Details

Double-clicking an order container opens a pop-up showing the full **Order Lines** breakdown. This allows supervisors or pickers to inspect the contents of an order.

Each row includes:

Field	Description
No	Picking sequence number (not important)
Location	Bin/shelf location in the warehouse
Item	Internal SVS item code
WHouse	Warehouse site (e.g., HAMI)
Ordrd	Quantity ordered by the clinic
Free	Free promotional items (if any)
ToPick	Quantity that should be picked
Shipped	Quantity already shipped (usually 0 unless back order)
BOrd	Backordered quantity (if stock is short)
Started	Timestamp showing when the order began being picked
Req	Required delivery date requested by the clinic

⚠️ The **Order Information** tab is outdated and should not be used.

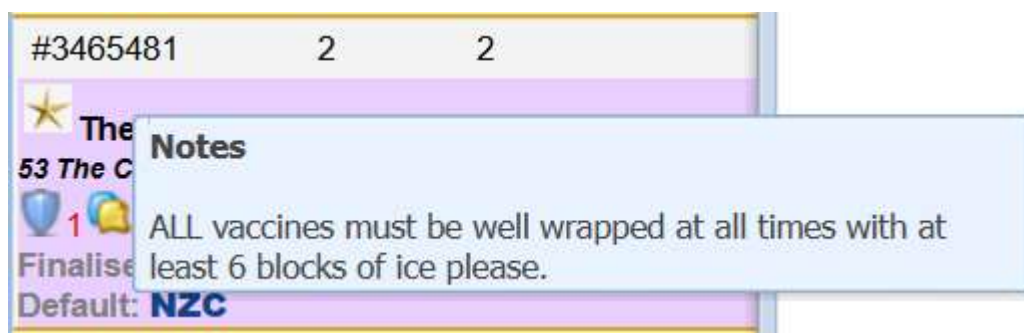|	Order Lines	Order Information								✕
No	Location	Item	WHouse	Ordrd	Free	ToPick	Shipped	BOrd	Started	Req
2	Q472	14901	HAMI	1	0	1	0	0		28/07/2025 00:07
Elocon Ointment 0.1% (50g)										
3	Q229	14477	HAMI	1	0	1	0	0		28/07/2025 00:07
Antirobe Capsules 25mg (80)										
4	C26B07	12548	HAMI	1	0	1	0	0		28/07/2025 00:07
Adaptil Calm Collar Med/Lge Dog (70cm)										
5	E22A05	18118	HAMI	1	0	1	0	0		28/07/2025 00:07
Orijen Dog Six Fish (6kg)										
6	F12A01	17697	HAMI	2	0	2	0	0		28/07/2025 00:07
R/C Feline Calm (4kg)										

Hover for Dispatch Notes

Hover your mouse over the **invoice number** (top-left of the order container) to reveal **dispatch notes**.

These are **critical** for allocation, picking, and packing. Always read them.

Common notes include:

- **"Urgent"**

- **"Van delivery"**

- **"Pack with extra ice"**

- **"Do not merge with other orders"**

- **"6-month expiry minimum"** for specific clinics

🔷 Online VetStore and chilled/frozen orders usually contain extra instructions here. Don't skip this step.

Visual Icons & Order Flags

Icons appear in the **top corners** of order containers to identify special handling needs.

Icon	Meaning
🛡️ Blue Shield	**Refrigerated items** (ice packs required)
⚠️ Yellow Triangle	**Dangerous Goods**
🏷️ Yellow Tag	**Controlled substances** (e.g. prescription drugs)
❄️ Snowflake	**Frozen goods** (dry ice required)
🩺 Stethoscope	**Equipment** (non-consumable items)
💬 Message Bubble/Symbol	**Order has dispatch notes**

Always combine icon info with dispatch notes for a complete understanding.

Order Container Colours

Order containers are colour-coded to indicate **urgency, special handling**, or **order type**. This helps supervisors and pickers prioritise at a glance.

Standard Colour Meanings

(Used in: Main, EDI, and Rural Dashboards)

Colour	Meaning
⚪ White	Order is **less than 1 hour old**
🟡 Yellow	Order is **more than 1 hour old**
🟢 Green	Order was **placed after 5:00 pm** (after-hours order)
🔴 Pinky-Red	**Urgent** order — prioritise immediately
🟣 Purple	**Priority customer** (high-value or VIP clinic)
🔵 Blue	Order contains **equipment** (tools, machines, etc.)

Dropship Dashboard Colour Overrides

Colours here indicate **order type or courier**, not urgency.

Colour	Meaning (Dropship only)
🔴 Red	**Online VetStore order** – requires an extra sticker; dispatch note confirms
🟥 Pinky-Red	**NZC Dropship** order
⚪ White	NZC Dropship — under 1 hour old
🟡 Yellow	NZC Dropship — over 1 hour old
🟢 Green	NZC Dropship — placed after 5:00 pm
🟣 Purple	**NZPost Dropship** — handled like NZC, colour is for visual distinction only

🔴 Tip: Dispatch notes still apply. Always check for additional instructions.

Right-Click Functions

Right-clicking an order opens a menu with allocating options:

1. Allocate / Split Order to Picker

Used to split specific lines to different pickers.

Common uses:

- Controlled drugs when no vetted picker is on shift
- Chilled items that must wait until Monday
- Urgent product split from regular stock

How to Use:

1. Right-click order → **Allocate / Split Order to Picker**
2. Select **picker**
3. Choose any **time** (not used operationally)
4. Un-Tick **items** to split them
5. Click **Allocate**

Remaining lines will stay unallocated.

2. Toggle BULK / Normal Order

Tags an order as **BULK** so heavy items (e.g., 6–20kg bags) appear at the top of the picker's **Lines** view on the handheld.

Toggles between:

- **Normal**: Sorted by aisle (B–X)

- **Bulk**: Heavy items shown first

Used for:

- Big food orders

- Efficient trolley planning

Bulk orders reload the dashboard when toggled.

3. Quick Allocate to Picker ☑ Most used

Fastest way to assign orders.

Steps:

1. Select picker from bottom-left list

2. Right-click order → **Quick Allocate to Picker**

3. Done. No time selection required.

`Used for **99% of allocations**.

4. Re-Allocate to Picker 🚫 *Not recommended*

Buggy feature that only works one order at a time.

⚠️ Avoid this option. Use **Unallocate + Quick Allocate** instead.

Selecting & Allocating Multiple Orders

You can allocate or move multiple orders at once, but there are **important rules** about how selection and dragging works.

Column Rules

- You can **only select orders from one column at a time**.

- If you select orders across multiple columns (e.g., 9:30 + 3:30), **only the orders from the column you clicked last will be moved or allocated**.

- Always check that your entire selection is from the same column.

How to Select Orders

Selection Type	How to Do It
✅ **Single order**	Left-click once
✅ **Multiple consecutive orders**	Click first, then **Shift + Left-click** the last — selects everything in between
✅ **Multiple non-consecutive**	Hold **Ctrl** and click each order individually

Dragging Multiple Orders

- Once selected, you can **drag and drop** the whole group to another column.

- Use this for quick reallocation across columns or when batch-assigning orders to a user.

Bottom Row Columns

At the bottom of each dashboard is a **secondary row of 4 columns** used for special sorting and exceptions.

---

1. To Merge

- Name is misleading — **not actually used to merge orders**.

- Often contains **interbranch orders** by default.

- No action is required unless specific instructions are given.

---

2. Misc / On Hold

Used for **orders that cannot be dispatched yet**, such as:

- **International orders**

- **Cash sales on hold**

- **Orders waiting for payment or stock**

---

3. Pick Ups

- For **clinics collecting orders directly** from SVS.

- ⚠️ **Not all pickup orders are tagged correctly** — check:

  - Dispatch notes for "pickup," "collecting," etc.

  - Clinic address for pickup wording

---

4. Allocated

- Shows all orders that are **assigned to pickers**.

- Use this to track:

  - Who has what orders

  - What's been started or not

  - Daily workload distribution

Unallocating Orders

- Right-click an order in the **Allocated** column → **Unallocate**

- Can be done for **one or multiple orders** using Shift or Ctrl

- ⚠️ If the picker has **clicked into the order**, it **cannot be unallocated**

If "Started" appears on the container, the picker has opened the order on their device.

Allocated Column Filters

The **Allocated** column has filter headers at the top to help you **search, sort**, and **monitor pick progress**.

Header Description

Order	SVS Invoice Number. Click to view full order details.
To	Picker name the order is allocated to.
Started	Time the picker opened the order on their handheld device.
Lns	Number of product lines (types of items) in the order.
Qty	Total quantity of all items in the order.

Use these filters to check:

- Who hasn't started their jobs

- How many orders each picker has

- Line and quantity complexity

Top Toolbar Buttons

The top toolbar provides tools and reports to monitor picking activity and performance.

BUTTON	FUNCTION
HELP	Displays a popup explaining how the dashboard works and what each icon means. Includes: "Notes", "Dangerous Goods", "Refrigerated Goods", etc.
REFRESH GRIDS	Reloads the dashboard and updates changes. Use when orders disappear, shift, or get stuck.
PICKS SUMMARY	Optional – rarely used.
DETAILED PICKS REPORT	Shows a live view of orders allocated to each picker. Useful during active shifts to monitor and balance workloads.
LIVE TREND	❌ Not used – broken.
PICK HISTORY REPORT	Most important end-of-day tool: • Lists all orders completed today • Sorted by employee name, then by time completed • Displays total lines picked per person – a key KPI.

The following icons are used:

- - Notes - mouse over order no for notes
- - Dangerous Goods
- - Refrigerated Goods
- - Controlled Goods
- **SAT** - Deliver on Saturday
- - Drycow
- - Customer Will Collect

Outstanding Picks Report

Allocated Picks Report

Report run on Monday 28th July 2025 - 4:42pm

Warehouse	Finalised	Order No.	Customer	Pick No.	Lines	Left	Total Items	Started
Afreen Bano – 243 lines today								
LQFT	28/07/2025 16:28:16	3465452	(102306) Whangaparaoa Veterinary Centre	2251176	3	3	3	
HAMI	28/07/2025 16:28:16	3465452	(102306) Whangaparaoa Veterinary Centre	2251177	27	24	59	●
Annabel Logan – 0 lines today								
LQFT	28/07/2025 15:06:20	3465345	(102204) Animals! The Vets	2251152	1	1	1	
HAMI	28/07/2025 15:06:20	3465345	(102204) Animals! The Vets	2251155	49	49	106	
HAMI	28/07/2025 15:08:13	3465349	(102204) Animals! The Vets	2251153	2	2	7	
HAMI	28/07/2025 13:41:26	3465183	(102204) Animals! The Vets	2251151	6	6	9	
HAMI	28/07/2025 12:14:16	3465032	(32653) Auckland Vets Ltd	2251154	10	10	17	
Chloe Munro – 71 lines today								
HAMI	28/07/2025 14:32:00	3465278	(419618) Kamo Veterinary Ltd	2251187	19	9	60	●
HAMI	28/07/2025 14:37:18	3465287	(419618) Kamo Veterinary Ltd	2251188	1	1	24	
HAMI	28/07/2025 14:31:10	3465314	(419618) Kamo Veterinary Ltd	2251186	1	1	8	
HAMI	28/07/2025 12:59:09	3465091	(419618) Kamo Veterinary Ltd	2251185	5	3	40	●
Cody Kirsten – 108 lines today								
HAMI	28/07/2025 10:58:10	3464885	(348248) Henderson Valley Vet	2251201	5	5	10	
HAMI	28/07/2025 11:22:35	3465370	(102317) Howick Village Vets	2251203	12	12	24	
HAMI	28/07/2025 09:43:16	3464789	(102317) Kiwi Pet Vets Ltd TA Pet Vets Manurewa	2251202	2	2	4	
HAMI	28/07/2025 13:28:12	3465415	(102222) Kiwi Pet Vets Ltd TA Pet Vets Papatoetoe	2251204	11	11	40	
LQFI	25/07/2025 17:05:03	3464031	(20677) VETS On Carlton	2250741	3	3	4	
Fiona Foster – 101 lines today								
HAMI	28/07/2025 11:20:29	3465364	(102298) The Vet Centre Northland (Maungaturoto)	2251076	2	2	7	

Pick History Report

Picked By:Max Cook

Pick Ticket No: 2250608			Doc No: 3464649		
Warehouse: HAMILTON			Customer: (824706)–V E Veterinary Services Ltd		
Picking Time: 00:16:07			Packing Time: 00:17:33		

Line	Item Code	Description	Override User	Pick Time	Location	Qty
1	1097	KetoMax Injection 15% 250ml		28/07/2025 12:09:30	C39A01	20
2	9200	Revive Powder 40 Dose Each		28/07/2025 12:17:42	G22A02	1
3	2803	Scourban Plus Suspension 2L		28/07/2025 12:18:52	H16B05	4
Lines:3						

Pick Ticket No: 2250607			Doc No: 3464719		
Warehouse: HAMILTON			Customer: (824706)–V E Veterinary Services Ltd		
Picking Time: 00:21:10			Packing Time: 00:17:33		

Line	Item Code	Description	Override User	Pick Time	Location	Qty
18	1118	Zoletil 100 5ml		28/07/2025 12:04:29	B15A06	1
5	14541	Aurizon Ear Drops 10ml		28/07/2025 12:04:56	B17D06	2
6	1038	Clavulox Palatable Drops 15ml		28/07/2025 12:05:52	C09A06	4
11	20535	Cardisure Tablet 1.25mg 80		28/07/2025 12:06:29	C09C03	1
10	15508	Metacam 0.5mg/ml Oral Cat 3ml		28/07/2025 12:07:16	C13A06	6
9	14399	Metacam 0.5mg/ml Oral Cat 15ml		28/07/2025 12:08:16	C19B06	2
14	6661	Nobivac Diluent 10 N/C		28/07/2025 12:08:40	C21B05	3
19	11803	Frontline Plus Cat 3		28/07/2025 12:10:22	D17B03	3
20	11808	Frontline Plus Dog Med 10–20kg 3		28/07/2025 12:10:48	D19B02	3
21	15815	R/C Canine Anallergenic 8kg		28/07/2025 12:11:57	E09A01	1
13	12850	Nobivac Syringe 21gx1"Needle 2ml N/C		28/07/2025 12:16:23	F26B01	25
8	10746	Rimadyl Chewable Tab 25mg 60		28/07/2025 12:19:41	R077	1
1	80539	Poly Visc Eye Ointment 3.5g		28/07/2025 12:20:01	R269	20
15	12028	Pentosan for Dogs 100mg/ml 20ml		28/07/2025 12:20:36	S426	1

17	13275	Hills Canine J/D 3.85kg		28/07/2025 16:20:50	F19A01	1
27	15028	R/C Canine Neutered Adult Medium 3.5kg		28/07/2025 16:22:11	F31A02	1
16	17918	Hills Canine GI Biome 3.63kg		28/07/2025 16:22:34	F34B05	1
9	1421	CBG 37.5% Flexipack 500ml		28/07/2025 16:29:13	G08C02	6
9	1421	CBG 37.5% Flexipack 500ml		28/07/2025 16:24:44	G19B01	18
22	12376	Loxicom Oral 1.5mg Dog 32ml		28/07/2025 16:30:05	P248	2
8	11624	Carprieve Tablet 50mg 100		28/07/2025 16:30:45	P258	4
20	13046	Isaderm Gel 15g		28/07/2025 16:31:13	Q214	2
32	9677	Stomorgyl 20 Tablet 50		28/07/2025 16:31:34	R096	1
11	14636	Elocon Lotion 0.1% 30ml		28/07/2025 16:31:54	R312	6
13	20617	Forthyron Tablet 200ug 100		28/07/2025 16:32:12	T059	1
26	2054	Panadol Paracetamol Tablet 20		28/07/2025 16:33:28	V028	2
36	17944	Vetscan Profile Comp. Diagnostic 24		28/07/2025 16:39:25	X02A03	1
34	1758	Ultravac 5 in 1 Plain 250ml		28/07/2025 16:39:47	X07A03	1
35	1763	Ultravac 5 in 1 Plain 500ml		28/07/2025 16:40:20	X07C03	2
33	1755	Ultravac 5 in 1 Plain 100ml		28/07/2025 16:40:39	X08B06	1
Lines:36						

Pick Ticket No: 2250997			Doc No: 3463182		
Warehouse: HAMILTON			Customer: (1021415)–Whitianga Vets Ltd T/A Peninsula Veterinary Service		
Picking Time: 00:25:32			Packing Time: 19:18:38		

Line	Item Code	Description	Override User	Pick Time	Location	Qty
1	19574	Customer Container Returns N/C		28/07/2025 16:16:03	E25A03	1
Lines:1						

Max - Total Lines Picked: 119

New Order Flow

- **Most new orders appear in the Unallocated column** across all dashboards.

- **Exception:** SVS Van Delivery orders typically appear directly in the **VAN column** (~90% of the time).

- **Older clinics** may still auto-assign to their usual NZC courier time slots.

Run Sheet Usage

To determine which **NZC time column** to place an order in:

- Use the "**Easy to Read Run Sheet**" posted around the dispatch desks and office.

- If the clinic is **not listed**, assign the order to the **NZC - 5:30pm** (overnight).

- **Don't guess** — always check address, account notes, or dispatch notes if unsure.

9:30	11:30	1:30
Edgecumbe	Katikati	**Cambridge**
Kawerau	Kopu	Huntly
Kinleith	Kihikihi	**Hamilton**
Opotiki	**Matamata**	**Morrinsville**
Taupo	Mt Maunganui	Ngaruawhia
Turangi	**Ngatea**	**Otorohanga**
Waihi	Omokoroa	Paeroa
Waihi Beach	Papamoa	Te Aroha
	Piopio	**Te Awamutu**
	Putaruru	Te Kuiti
	Raglan	
	Rotorua	
	Taumarunui	
	Tauranga	
	Te Kauwhata	
	Te Puke	
	Te Puna	
	Thames	
	Tirau	
	Tokoroa	
	Waitomo	

VAN - 06:00 AM

Order	Lns	Qty
#3464744	23	10
Gavin's Vet Store Ltd TA Huapa 371 Main Road, Huapai, AUCKLAND		
Finalised: Today 3:30pm (Webs Default: **VAN**		
#3465204	6	84
Glenfield Veterinary Clinic 46 Diana Drive, Wairau Valley, AUCKL/		
Finalised: Today 1:49pm (Webs Default: **NZC**		
#3465469	8	10
Glenfield Veterinary Clinic 46 Diana Drive, Wairau Valley, AUCKL/		
Finalised: Today 4:17pm (VetCh Default: **NZC**		
#3464885	5	10
Henderson Valley Vet 225 Henderson Valley Road, Hendersc		
Finalised: Today 10:38am (Vick Default: **VAN**		
#3465370	12	24
Howick Village Vets 14a Moore Street, Howick, AUCKLAND		
Finalised: Today 3:22pm (VetCh Default: **VAN**		
#3464789	2	4
Kiwi Pet Vets Ltd TA Pet Vets M 128 Great South Road, Manurewa, AU(		
Finalised: Today 9:43am (VetCh Default: **VAN**		
#3465415	11	40
Kiwi Pet Vets Ltd TA Pet Vets P. 93 East Tamaki Road, Papatoetoe, AU(		
Finalised: Today 3:29pm (VetCh		

Dashboard-Specific Behaviour

Each dashboard has unique rules for how orders appear and how time slots or colour coding should be interpreted.

Main Allocation Dashboard

- Used for **all standard clinic orders**.

- **Most orders** appear in **Unallocated** by default.

- **SVS Van Delivery orders** usually appear directly in the **VAN column**.

- **Older clinics** may appear directly in time slot columns due to saved settings.

- **NZC time slot columns (9:30 – 5:30)** are used as **actual courier run guides**.

  - Use the printed **run sheet** on the wall.

  - If the clinic isn't on the sheet → allocate to **NZC 5:30 pm** (overnight).

EDI Allocation Dashboard

- Used for **Animates, PetStock, Pet.co.nz** (EDI customers).

- Two common types of orders:

  - **Big food orders** → automatically tagged as **BULK**

  - **Flea treatment orders**

- **NZC time slot columns are NOT used** — the courier name (NZC, NZPost) is all that matters.

- Orders must be packed according to EDI-specific rules (see warehouse manual).

Dropship Allocation Dashboard

- For orders fulfilled by **external suppliers** (dropships).

- **Orders appear based on courier and source**:

  - 🔴 **Red:** Online VetStore orders → must receive **extra sticker**

    - Notes usually say "Extra sticker" or similar

  - 🟥 **Pinky-Red:** Regular NZC dropship orders

  - 🟣 **Purple:** NZPost dropship orders → packed same as NZC, just colour-coded differently

  - ⚪ 🟡 🟢 NZC Dropships → batched by 2–3 hour periods for FIFO (First In First Out)

- Colour = **type of order and courier**, not urgency.

- Orders are usually **dragged into appropriate columns** manually.

Rural Allocation Dashboard

- Only for **Rural-tagged accounts or locations**.

- You can place orders into **any NZC column — time slot doesn't matter**.

- Colours follow **standard rules** (green/yellow/red).

- Always check dispatch notes for any specific delivery or pickup instructions.

Merge Picks? Tick Box (Next to Picker Selection)

Located next to the **picker search bar**, the **"Merge picks?"** tick box allows supervisors to **combine multiple orders into a single pick** on the assigned picker's handheld screen.

✅ **Purpose:**

- This feature is designed **only for Dropship orders**.

- Dropship orders are often very short (1–3 lines), so assigning them individually is inefficient.

- Merging makes it faster for trusted pickers to handle batches of dropship jobs in one go.

⚠️ **Strict Guidelines:**

- **Only use with experienced/trusted staff** — there is a high risk of:

  - Packing the **wrong items into the wrong orders**

  - **Mislabelled boxes** due to mixed picking

- **Do NOT use** this to merge large, unrelated clinic orders (e.g., two 30-line orders)

  - It will be slower and error-prone to dig through a mixed trolley
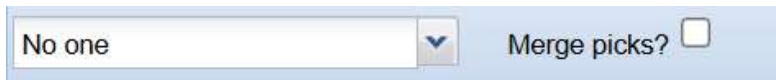
🛑 **Important Limitations:**

- **This does NOT merge packs** — only picks.

- It is a **supervisor-only dashboard feature** — pickers **cannot do this themselves** from their tablet.

- Pickers **can merge multiple orders from the same clinic** (handled via handheld), but they **cannot merge different clinics' orders** — only the allocation dashboard can do this.

🧠 Always confirm you're working with dropship orders before using this tick box.

These merged orders will show up as "Merged picks" on the users pick screen.

Important Access Restriction Note

The Phoenix allocation dashboards are a **supervisor-only tool**. Regular employees and pickers **must not use or alter these dashboards**.

Why:

- They may **not understand the specific requirements** for certain clinics or courier types
- They may allocate something that:
    - **Should be on hold**
    - **Can only go on certain times / days**
    - **Requires handling by authorised staff only** (e.g. forklift)
    - **Order that came in 10 minutes ago when there are 10-hour old orders.**
- They likely **won't know / remember about dispatch notes**, special order requirements, or daily cutoffs
- They may **accidentally merge** the orders

⚠️ Mistakes in the allocation dashboards can cause **delivery failures, and / or incorrect packing**.

Only trained supervisors should use the dashboards.