ScanPick Advanced Options Guide

Picked vs Packed Dynamic Tagging

• When fully (or partially) picked, a Tag will be added to the Order if the above settings are filled out.

• Once something has been picked, it can [later] be confirmed as Packed, as well as [Optionally] marked as fulfilled. (more on that later.)

• You may also set dynamic variables for these tags, ie:
  ▪  {{signer}} = users session initials
  ▪  {{localdate}} = the localized date and time of the user’s action

Advanced display settings for Picking Open orders
• **Pick list default sort**
  - If you would like the items specifically sorted when picking, specify which fields and sort order. Each pick screen will be sorted in hierarchical order based on what you input.

• **Show Fulfilled Orders/items as open**
  - If your orders are auto-fulfilled, or are picking/packing after the order is marked as fulfilled, you will need to toggle this setting on.
  - Once on, Orders will stay in the Pick open orders screen until you confirm them as Packed in the App. Otherwise, any order or item that has been fulfilled will be removed from any view.

*NOTE: If you scan in an Order that is not live (ie: Held or Closed) you may still pick the items, however, a notification will be present.*

*NOTE: Each user can Only scan the FulfillmentOrders from their Location set when they begin their session. All Orders are synced a few seconds to a few minutes from creation.*

Advanced configurations
• Mark as fulfilled if confirmed as Packed
  ○ If the Order is being confirmed as Packed, the user can also mark (or confirm if already fulfilled) the items picked as Fulfilled in Shopify by setting this as default.
  ○ The user can override this in the pick screen, as well as [optionally] scan a shipping label*. This will be posted when we mark the items as fulfilled.
  ○ *NOTE: If already fulfilled, the tracking number will appear by default. And/or the user can scan the shipping label which will confirm the order as packed, or error if there is a different label scanned.

• Ship non-shippable line-items
  ○ If you have digital or other pseudo line items (ie: downloadable, Route package protection) you can opt to have those items (and their fulfillments) skipped from the pick Open order and pick screens.

• Display Pick/Pack Log in order timeline
  ○ Only if this is on, we will After a Pick or Pack, we will add the above details to your Order’s timeline*
  ○ *NOTE: Due to Shopify limitations, the only way to add to the timeline is to create a note and then remove it (as the note would appear in other places)
*NOTE: if opt-out, you could still refer to our Orders & items picked over time exports.

**Handling multi-location (or multi-fulfillment) orders**

- If there are multiple fulfillment requests in an Order (ie a for a warehouse and Store location), then, each location will pick their separate fulfillment order, and the Tag and Timeline will have a special “F-[sequence]”. (The sequence references the fulfillment box # in your Shopify order screen)

**[New] Adding a Bin Location identifier per item**

Aside from scanning item barcodes or SKUs, you now may also map or input a 3rd identifier called a Bin location. This is usually used to reference a dedicated space (ie: a bin or location of a warehouse) where the item would be picked from. It may also apply to any of your product variant metafields (ie: ingredient). To include a bin location per item, there are (3) options:

- **Option 1: Bulk-edit inventory identifiers**
  - Go to Scan inventory -> “Bulk-edit identifiers” and filter a group of items to edit
  - Input and Save each modified row, or save all at the bottom.
*NOTE: like inventory cycle count scans, any modification is tracked in the Scan an item -> inventory Scan and Edit log!*

- **Option 2: Edit in Shopify, or your favorite import/export App**
  - By default, we have created our own Product variant metafield called “ScanPick Bin Location” – which you can modify alongside your typical inventory workflow or favorite import/export App that works with metafields. All updates are synced in real-time!
  - *NOTE: Metafields edited or imported through Shopify vs our Bulk-edit feature will sync each hour (not real-time).*

- **Option 3: Have an existing metafield? Auto-Map it in your settings**
  - Select the metafield you want to use in your Advanced settings and save
  - *NOTE: once changed, this will replace any existing inputs with the newly mapped metafield and take some time to backfill.*

Then, once the Bin Location identifier is inputted, it will be incorporated in the following areas:
• Below the barcode & SKU when scanning/picking items
• When scanning inventory cycle counts (and when edited in the bulk-editor)

• When printing Labels
  ○ HINT: Toggle the Scan by .. column when selecting items to print labels for and the barcode can now be switched with the bin location (or SKU) for the label!

Handling manual picking vs scanning

Ideally, every item of every order would be scanned unit by unit. Though, when you need to, you can always manually input the units picked. Here is how that is tracked:
• When item(s) are manually entered vs scanned, the row turns from green to yellow in the pick screen.

![Image of note added to order]

• The note in the Order timeline and exports will also differentiate scanned vs picked items.

![Image of pick screen new automations]

• And [optionally], (if you are the shop owner) you may opt-into requiring a user to enter a 4 digit “Admin” Pin to manually adjust picks per order. To set this up turn on in your advanced settings, and you will be prompted for your existing pin (in which our team will furnish to you upon request).

ScanPick Summer 2022 App upgrades

July 15th 2022

Pick vs Pack screen new automations.
- If a user returns to a Picking screen after it has been tagged as Picked, then the Confirm as packed section will be automatically prompted.
- Or, you can also set the “[Auto-set] confirm as packed if fully picked” in your Pick & Pack settings to automatically confirm the order as packed once all items are fully picked!
- If you are scanning a shipping label, then the App will automatically Tag and fulfill – sending you back to pick the next open fulfillment order if successful.

Pending payment filter

- If a fulfillment order is not fully paid, an announcement and badge will appear. You can also filter these out of your open order screen.
Receipt view (and timestamps)

- Once picked (and/or) packed, you may now click on the receipt view of any fulfillment order (or via the “Pick/Pack receipt” under More actions in your Shopify admin order screen)
- Here, you may “reset” the pick and pack status of any fulfillment order once picked or packed. If you do, users may re-pick and re-pack from the open orders screen, though the log history will not be reset.
- The receipt will detail timestamps in your *registered* shop’s local time (editable in your communication settings) for when items were scanned, picked and/or packed. This is also downloadable as a PDF
- *NOTE: anything picked or packed before you have received this memo will not have the history log as this is a newly published feature!*

Forced alerts and [Optional] confirming
- In your Pick and pack settings, you can now opt-into forced alerts for a mis-scan or over-scan. If on, and a user makes a mistake, they will be forced to accept the warning in order to proceed.

- Also, if you are marking a fulfillment order as packed, a user can either scan in a fully picked item, or press the confirm link, to then “confirm” a pick as a second check to add to the log / receipt.
Personalize titling, colors, and sounds

- Color fully picked, partially picked, and manually picked items separately
- Opt-into displaying unit price and weight per item
- Any order notes will now display when picking/packing.
- Enhanced mobile views, and a new camera-specific setting.
- Yes, there are now sounds for correct/incorrect picks. You’re welcome 😊
New dashboard widget! Compare items/units picked/packed over time per staff member. Export hourly, daily, monthly stats!

- All times are in your shop’s registered time zone – editable in your settings.
- **Also, all report views and exports now reference time last picked/packed vs order creation date. This allows for a more accurate aggregate tally, per user, per day of what was picked, packed, and confirmed.**
ScanPick Summer 2023 App upgrades

Casepack identifier

Import for identifiers

Session roles and time clock

Picks/Packs/hr and manually picked exports

Split or remove unpicked items

Reserve or make inventory unavailable

App speed and server optimizations