Using Order Monitor

Several work processes done in the yard or warehouse are performed using Order Monitor. In this course, you will learn how to locate Orders for Picking, how to enter a Picking Confirmation, and the process to mark Orders for both Pick-Up and Delivery.

Picking staff use Order Monitor to find orders that are ready to be prepared for delivery or customer pick up. To find these, set the Filter to Orders for Picking. To limit the search by Dates, choose an option from the drop down. For selections other than Custom Dates, the From and to are auto-filled with the corresponding data.

Certain Filters automatically enable the Only orders at this status option. The system considers All Delivered and Will Call sales as orders-for-picking. They can however have other statuses before Picking such as Waiting for Stock or Credit Control. With the Only orders at this status check box enabled, BisTrack limits the search to orders at a Picking status.

Click Go to perform the search. The system lists the orders for Picking specified in the date range. A best practice is to group the information by the Date Required. To do this, click and drag the Date Required column header to the Group by box. Now the system shows the orders for each day within the date range you specified in the search criteria.

To see additional statuses, disable the Only orders at this status check box. BisTrack conducts the   new search immediately. The results now include Delivered and Will Call orders that have a status other than Picking.

With the orders for picking identified, we can now print the Pick Tickets. You can select multiple orders for printing as long as they are the same Sale Type and either cash or charge. Here, we select two Will Call charge orders. There is a Print button on the toolbar. It displays the name of the document format last used. Clicking the drop down shows all formats.

If not already selected, choose the Print Picking option. Change the Print Document settings as needed. When finished click the Print button.

Using these documents, the staff assembles the orders, hand writing the quantities picked and any other relevant information onto the pick ticket. This information is then used to enter the Picking Confirmation. To begin, find the order and then open the right-click menu. Select Sales Order Processing and then Mark Order. This opens another menu where you can select Mark Picked.

The Picking Confirmation window opens. It is similar to the sales order window with the customer name, delivery address and date information in the header area. There are tabs for displaying the Lines, Special Instructions, Header, and Internal Notes. Use the Lines tabs to enter product quantities when picked.

BisTrack shows the Requested quantity below the product code and description. Enter the quantity picked for each item. When the quantity entered matches the Requested quantity, the Status of the line changes to Picked and the cursor moves to the next line for entry. You can enter Orders picked in full quickly using the Pick All button. The system automatically matches the Quantity for the remaining lines to the Requested quantity and updates the line status for each to Picked.

To finish the entry and move the order to its next status, select Pick Confirmed. You can use other buttons to Save the picking information without changing the order's status, or you may press Cancel, which closes the window without saving the entries. You can also mark an order as fully picked without having to open the Picking confirmation window.

From the Order Monitor window, highlight an order for Picking and right-click. Select Mark Order and then Mark Fully Picked. The system automatically picks all lines on the order to the requested quantity and moves the order to the next status in the processing cycle.

Will Call orders that have been marked as picked now have a status of Pick Up. When the customer comes in to get the order, find it using Order Monitor. Highlight the document then open the right-click menu. Select Mark Order and then Mark Picked Up.

Cash orders with an outstanding balance cause the Deposits and Payments window to open. You must enter the payment before marking the order picked up. The system flags charge and fully paid cash orders as picked up and proceeds to the Invoicing status. Confirm the release date and choose to print and or email the final document. Click OK or press F12 to continue. The status changes to Invoiced completing the sales processing cycle for the order.

Delivered sales orders are given a Delivery status after they have been picked. When the shipment is ready to go, mark it delivered. Within Order Monitor, find the orders for delivery. The toolbar displays a button used to Mark Delivered or Mark Picked. It displays the last option used. If not already selected, click the drop down and choose Mark Delivered.

BisTrack opens the Order Delivery Date window where you can set the delivery information including the Delivery date, a Reference, and Vehicle Type. The system automatically selects the option to Print delivery note document set. Click OK to proceed.

A delivery ticket similar to the sample shown is used to deliver the order to the customer. The order is now marked delivered and given the status Invoicing. When the delivery has been completed and the signed paperwork has come back, the order is invoiced. Refer to the Training on Demand course "Invoicing Overview" for instructions on how to invoice orders.

Order Monitor provides all the tools necessary for processing sales orders. You should now be able to use it to find Orders for Picking, enter a Picking Confirmation, and Mark Orders for Pick Up and Delivery.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR.

Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298