Pick Inventory for a booking / Warehouse Prep

Last Modified on 09/12/2024 4:55 pm EST

Pick equipment for a booking using the RentalPoint Warehouse Prep mobile app OR from the RentalPoint Desktop menu. Real time updates allow multiple users to pick from the same list of equipment simultaneously!

- Picked assets are considered still in the warehouse (possibly a staging area) and set aside for a particular booking waiting for checkout
- Checked out assets are considered 'out' of the warehouse in use on the booking they are checked out on.

Scan options available for RentalPoint3 include keyboard wedge, bluetooth and in device camera for barcode or QR Code scanning

Table of Contents

- Equipment Scope
- The Pick List Screen
- Modify Grid View
- Barcode Items
- Non Barcoded Items
- Reserved Assets
- Undo Pick
- The Message Board
- List Information
- Multiple Bookings
- Additional Equipment
- Pick a Road Case/Rack
- Refresh the Pick List
- Additional Options
- Batch Scan
- Substitutions
- Session List
- Check Out Prep Session
- View Warehouse Sessions

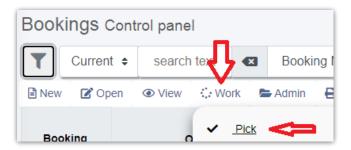
Mobile User Access



Desktop User Access

From the Bookings Control Panel, highlight the booking to pick equipment for,

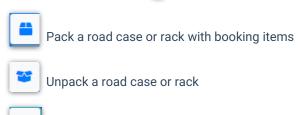
then choose the Pick option from the Work Menu



Equipment Scope

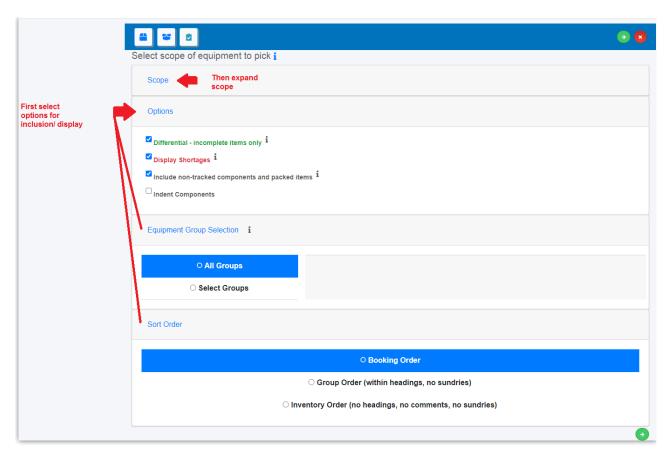
The **Scope** area provides options to determine the range of equipment on the booking to pick.

Where available click the 🚺 to the right of headings for more information on the title

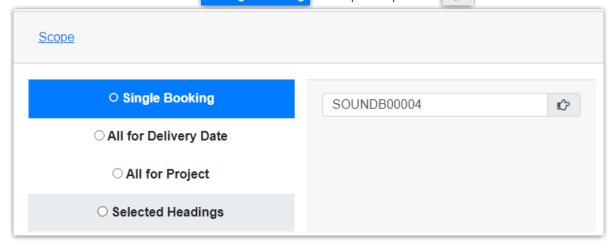


View items already picked for this booking

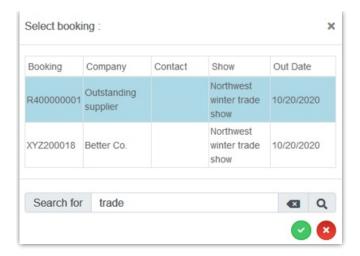
Before picking, click/unclick the options below to narrow your scope as needed, then expand the SCOPE option



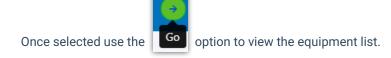
Scope can be narrowed to a single booking or expanded per options below. By default the highlighted booking is selected in the search box. Click Single Booking to keep this option or to search for other bookings



Enter a portion of the field you want to search for (show name, company, booking # or contact)

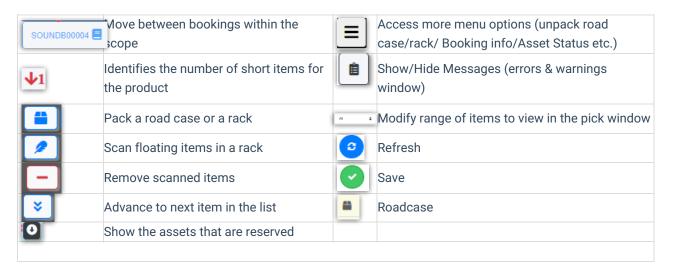


Select the booking and click the checkmark to accept.

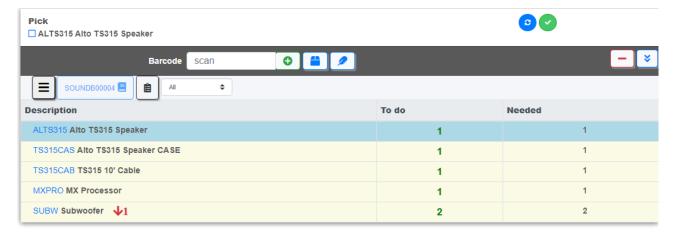


The Pick List Screen

The pick list displays equipment within the scope selected by the user.



Sample 1:

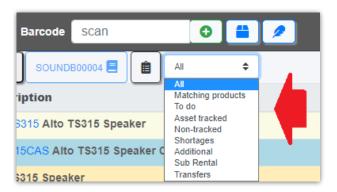


Sample 2:



Modify Grid View

The number of items visible in the grid can be narrowed down by selecting one of the options



Matching Products - Show all lines with a product matching the currently selected line

To Do - Only display lines that still need to be picked

Asset Tracked - Show Assets (items with a unique barcode) to be picked only

Non-Tracked - Show only items that are NOT tracked with a unique barcode

Shortages - Show only items that are short

Additional - Show only items that have been scanned that are NOT on the booking (i.e. items added at checkout)

Cross rental/Sub hire - Only display lines that are assigned to a cross rental PO

Transfers - Only display lines that are assigned to a transfer

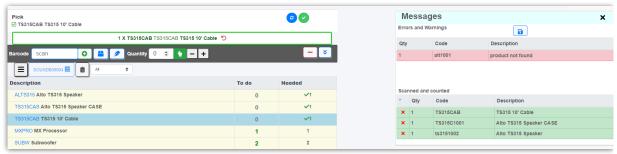
Q.T./D.A.T. – Only display lines that will be resolved by a quick turnaround or direct transfer from another booking

Barcode Items

- 1. Click on an item in the list, then scan the barcode to pick that item
 - . Errors will show up red on the Message Board (warnings will show in yellow)



- Successful scans will show up green on the Message Board.
- A check mark will show under the 'Needed Column' for that item in the list while the 'To do' qty will be decremented

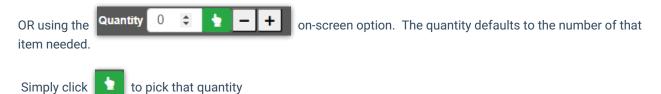


• Items picked for other bookings will not be available for picking



Non Barcoded Items

Non Barcode Tracked items can be scanned using the non tracked barcode from Product Setup



Before Pick

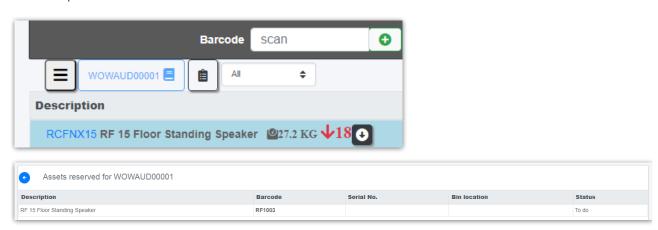


After Pick



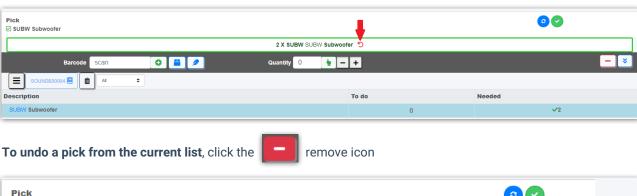
Reserved Assets

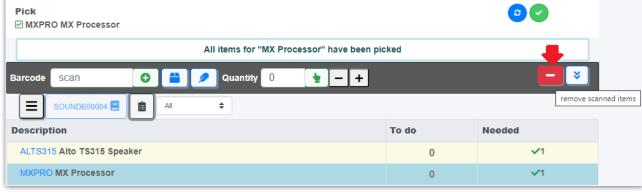
The icon on any line identifies reserved assets for that item click the icon to display a list of <u>reserved assets</u> and their pick status.



Undo Pick

Undo the last item picked using the | 5 | icon to the right of the picked item



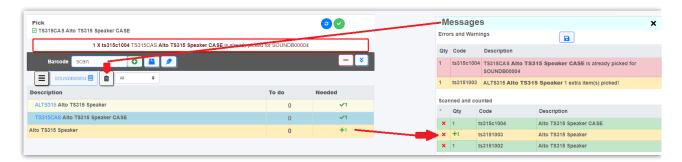


Then scan the barcode to remove OR 🔀 to cancel the operation

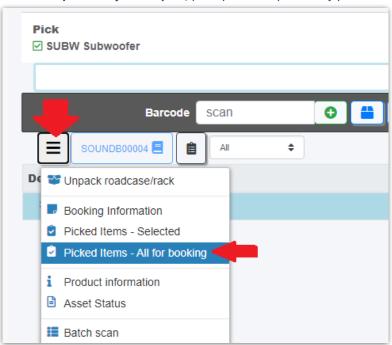


Alternatively, open the Message Board and click the X to the left of any scanned item

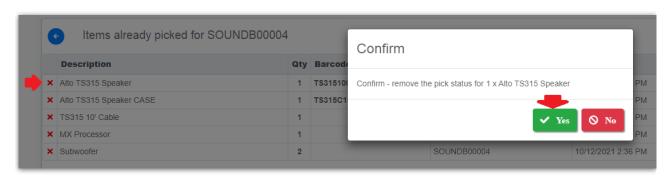
Below, the +1 shows that an extra asset has been scanned. Simply click the x to remove/undo the scan for that item



To undo a previously saved pick, pull up a list of previously picked items



Then click the x to the left of the item to remove and confirm



The Message Board

Errors and warnings show up colour coded as follows

WARNING



SUCCESS



ERROR



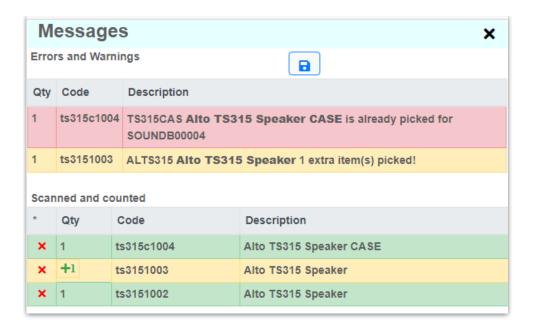
Access the Message Board using the screen. This is a toggle icon, so you can click the icon a second time to remove the board.

scan

Use the icon to save errors to a file and clear the 'on screen' error list. Files are saved to the hpdata_dir\Error Lists using the booking number (hp_data is defined during setup in your web.config file)

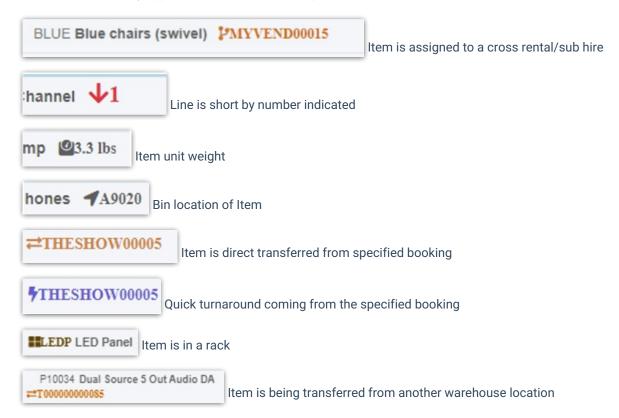
Barcode

Use the X to the left of any item to remove the pick for that item



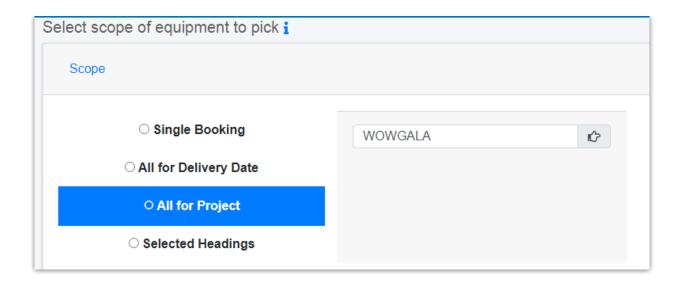
List Information

Extra information may appear beside the item description as below:

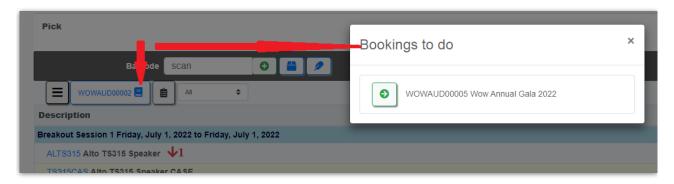


Multiple Bookings

When there is more than one booking in the equipment scope selected by the user - i.e. if a user selected a project or delivery date

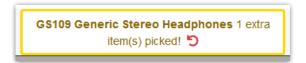


Move between the Bookings within the scope by clicking the current booking. This will show a list of other bookings available for picking. Select any booking in the list to load the equipment list for that booking based on the initial scope.



Additional Equipment

Items that are not on the original booking equipment list, when scanned, will either show an error message indicating they cannot be picked, or a warning showing they will be added as an extra item. This is controlled by Barcoding parameter #10 "Can add non-components"



Extra items picked will appear with a plus icon in the qty column, indicating that they are not listed on the original equipment list for the booking

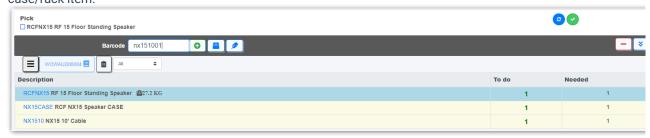


NOTE: While picked for the booking, additional items scanned at the pick stage <u>do NOT add items to the actual booking at this point.</u>

Picked items will be added to the booking at time of checkout.

Pick a Road Case/Rack

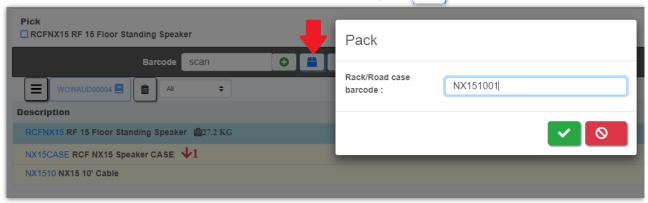
Road cases/ racks are picked in the same way as other equipment. Simply scan the barcode of the road case/rack item.



All items <u>registered in RentalPoint</u> as currently packed in the rack/road case will be picked when the rack/road case is picked.



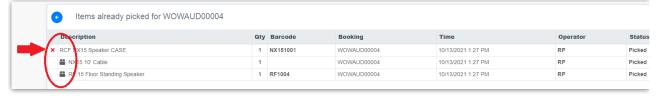
Unpacked Racks/Cases can be packed from the Pick window using the icon





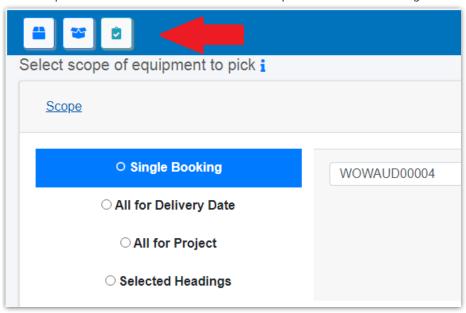
The packed case is picked once saved using the icon. Again all items in the case are picked when the case is picked

Similarly, removing the case from the 'Picked' items, will remove all packed items too



NOTE: To Pack/Unpack road cases or racks <u>without</u> picking them, use the icons on the SCOPE or Racks and Road Caes Window.

Items unpacked from a rack/road case will be 'unpicked' from the booking too.



Refresh the Pick List

At certain points when scanning equipment, the pick list will be updated to reflect changes made by other users.

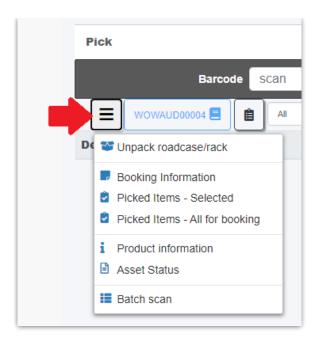
Operators can manually refresh the list by clicking the display will reflect 'picks' made by other operators.

An exclamation point will appear beside the line where a new pick was added by another user.



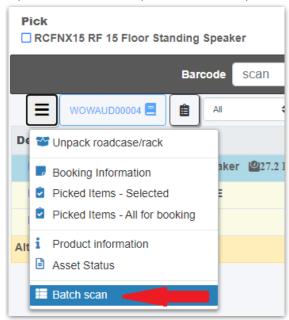
Additional Options

Accessible via the 📒 icon, view booking/product/asset/pick information and/or unpack a road case



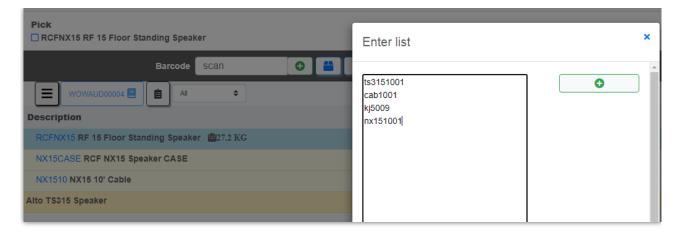
Batch Scan

Open the 'Batch Scan' option to scan multiple items without moving through the pick list



Then scan or copy/paste your barcodes into the scan window and click





All items will be scanned to the booking, with errors and warnings registered where applicable

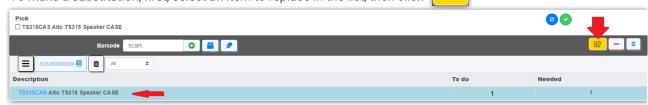


Substitutions

Substitutions of equipment can be made within the pick list window. The original line will be hidden from the pick list but will still be included on the invoice. The new item will be visible to the warehouse but will not affect the price.

Operators must have the "Resolve Discrepancy" Operator privilege in order to see the substitutions option in the Pick window

To make a substitution, first, select an item to replace in the list, then click

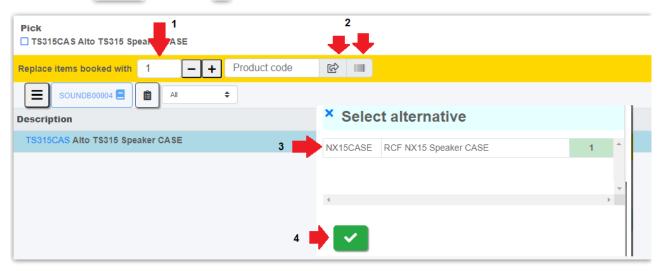


The action bar will be replaced with the yellow substitute bar (see screenshot below):

- 1. Select the quantity on the line that should be replaced
- 2. Enter the product:
 - 1. either by pressing 🔯 to select from a list of alternatives
 - 2. or by pressing and scanning the barcode of the item to be selected.
- 3. Select the alternative item from the list (when selecting from a list of alternatives the current availability of

each item appears beside the description)

4. Click to commit or x to cancel the selection



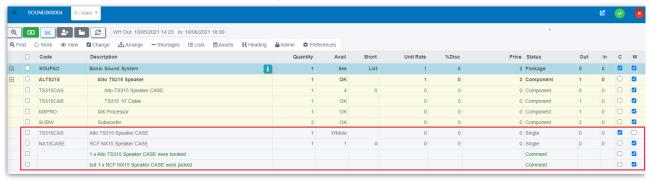
Once the substitute item has been selected, click to save or to cancel the substitution



Below the Product has been substituted but still needs to be scanned. The substituted product is identified with a

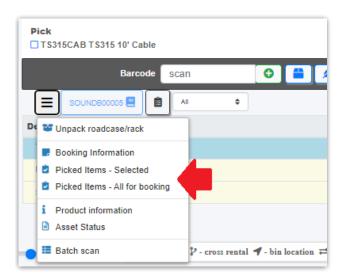


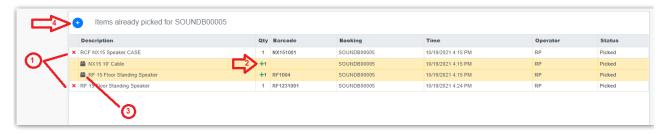
Here's how the substitution shows in the booking



Session List

Previously picked items can be displayed by clicking on the menu button and selecting from the available options. These options include current & previous session lists for all operators.



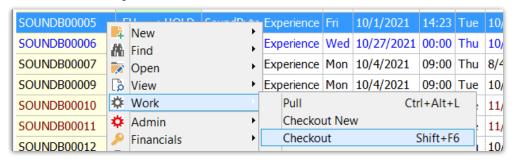


- 1. Click to remove picked items from the list
- 2. Items that will be added to the booking on checkout are identified with a to the left of the Qty field
- 3. Items packed into a road case/rack are identified with a icon to the left of the product description.

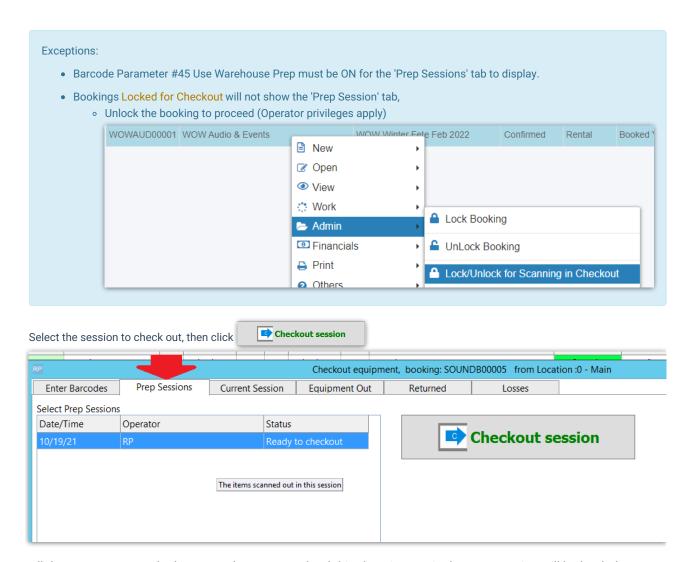
 Removing the road case/rack product here will remove all the packed items with it but the items will remain packed in the case. To remove a single item, open the road case/rack in the pack window.
- 4. Use the to go back to the Pick menu

Check Out Prep Session

Warehouse prep sessions can be loaded into the checkout window in **RentalPoint Desktop** so that items don't need to be rescanned before loading.

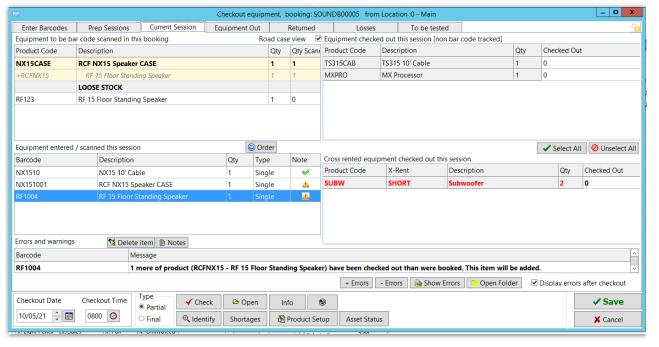


In the Checkout window click on the Prep Sessions tab.



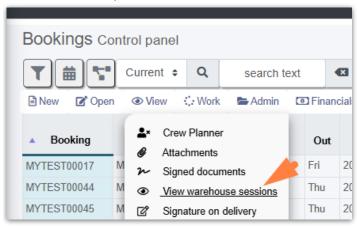
All the assets, non-tracked items and cross rented/sub hired equipment in the prep session will be loaded. Any errors found in the session will be listed in the Errors and warnings window.

The operator should then click the save button to complete the checkout.

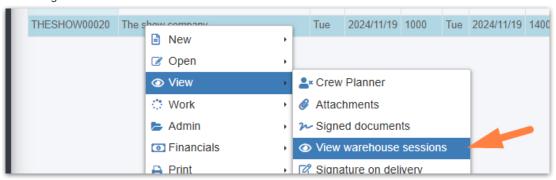


View Warehouse Sessions

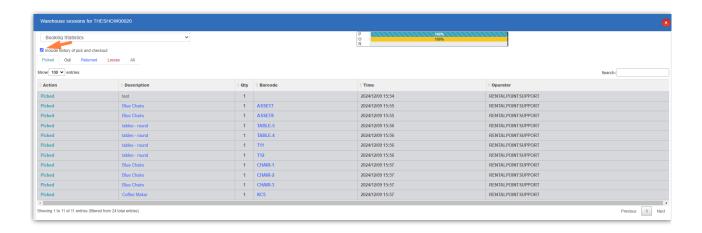
Access from the top menu

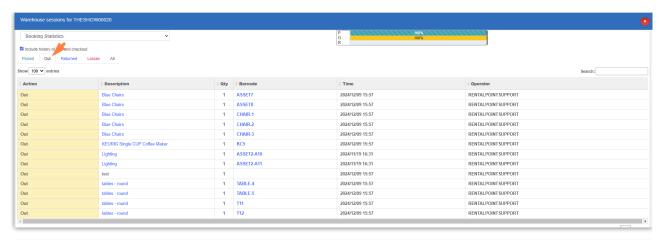


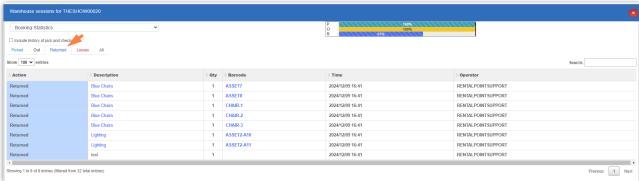
Or the right click menu



- Click 'include history' to see previously picked or checked out items that have now been returned or processed as a loss
- Uncheck 'include history' to see only items that are currently in the status of that status on the booking







- See both Picked and Checked out information under the 'All' tab
- Use the sort arrows beside each field header to change the sort order

