

Outbound - Warehouse

Last Modified on 05/01/2023 8:46 am CDT

Overview

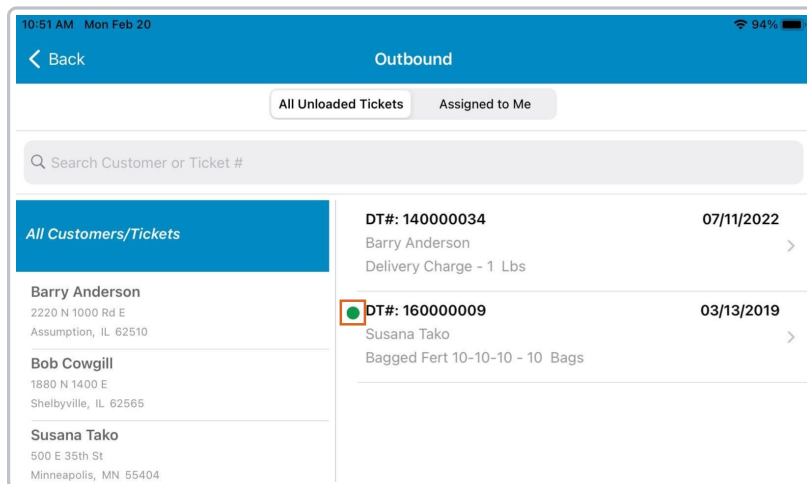
Tap **Outbound** to access Delivery Tickets. If any tickets are assigned to the user, a visual indicator on the *Outbound* option displays the number of tickets assigned.

Selecting the *All Unloaded Tickets* options displays all unloaded Delivery Tickets that have been created either within Agvance or the app.

Filter the jobs list for only those assigned to the user by selecting the *Assigned to Me* tab.

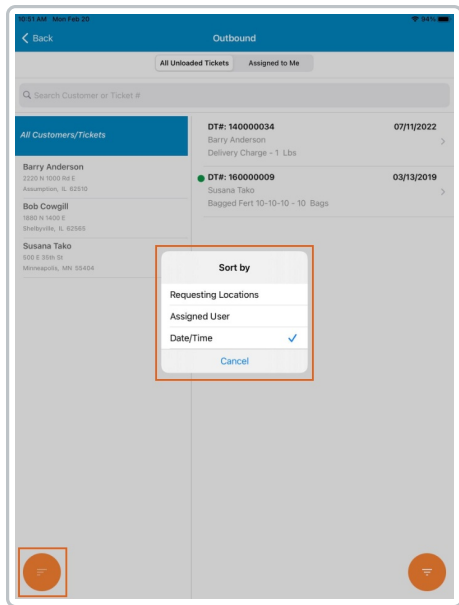
Use the *Search* field to search by customer name, ticket number, from a list of favorites, or from an existing Delivery Ticket document by scanning the customer or Delivery Ticket number bar code (optional print preference in Accounting). Selecting a customer displays tickets for only that customer. Select **All Customers/Tickets** to return to the full list.

The green dot beside a ticket reflects unloaded tickets that have not yet been opened within the app.



Sort By

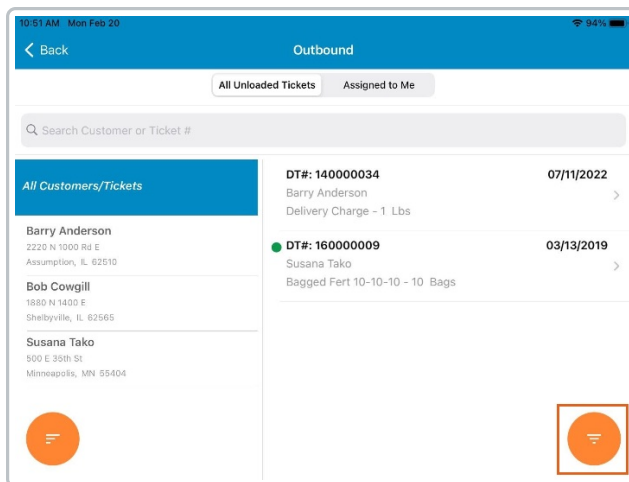
Select **Sort By** on the bottom-left to sort the ticket list.



- **Requesting Locations** – This option sorts and groups tickets by locations.
- **Assigned User** – This option sorts and groups tickets by assigned user.
- **Date/Time** – This option sorts tickets in ascending order by Date and Time.

Filter By

Choose **Filter By** located on the bottom right to filter the ticket list.



- **Ticket Location(s)** – Selecting this option opens the *Locations* window and allows the option to filter tickets by ticket location.
- **Ship From Location(s)** – Selecting this option opens the *Locations* window and allows the option to filter tickets by Ship From Locations.

Creating/Editing a Delivery Ticket

Select the Customer, then tap **Create New Delivery Ticket** or tap a ticket listed to view or edit information.

Ticket

When opening a ticket within the app, the ticket is locked both in Agvance and in the app, preventing others from editing the ticket. The ticket information displays in a view-only mode. Any text field boxes or text displayed in blue indicate a field that can be edited.

Use the *Add Product* search field to add products to the Delivery Ticket. Search by:

- **Abc** – Start entering a product name. After three letters are entered, the app searches the database for product names containing that string of letters. As more letters are entered, the search narrows.
- **Bar Code** – Scan the bar code to find the product.
- **Star** – Search the list of favorite products.

Tap the product to add it to the ticket and see some of the product's information.

To complete the addition, enter the *Requested Quantity*, select a *Lot Number* (if applicable) and turn on the *Product Picked* toggle if the product has been pulled from inventory and is staged and ready for pick up or delivery.

The amount defaults to the *Requested Quantity* but can be changed if the pickup/delivery quantity is different. The *Load Amount* field turns red to indicate the amounts do not match and a warning displays asking how the underloaded product(s) should be handled.

- **Back to Ticket** – If an error was made entering a quantity, select this option to return to the ticket and make a correction.
- **Discard Product(s)** – If the picked quantity is correct and the customer will not be taking the remaining requested quantity, select this option.
- **Add to New Ticket** – If the customer will be receiving the remainder of the Requested Quantity later, select this option to add the product(s) to a new ticket. All products from the original ticket where the Requested Quantity is greater than the picked quantity will be added to a new ticket. The new ticket will include a comment *Created from underloaded Delivery Ticket XXX*.

Note: The new ticket is not considered on backorder.

Select **Done** to finalize adding the product to the ticket. Swipe a product to the left and tap **Delete** to remove a product from the ticket.

10:53 AM Mon Feb 20

Cancel Ticket # 140000034

Ticket Customer Fulfillment Documents

Q Add Product

PRODUCTS TO PICK

Delivery Charge

Dept ID/Prod ID: Serv01 / Delivery
 UPC:
 GTIN:
 Manufacturer :
 Federally Restricted: False
 Storage Code:
 Amount on Hand -160000 Lbs
 Available for Sale Calculate

Requested Quantity
 Lbs
 Lot Number
 Add
 Select container
 Load Amount 1 Lbs
 PRODUCT PICKED ☐

Bagged Fert 10-10-10

Dept ID/Prod ID: Bag00 / 10-10-10Bg
 UPC:
 GTIN:
 Manufacturer :
 Federally Restricted: False
 Storage Code:
 Amount on Hand 1153 Bags
 Available for Sale Calculate

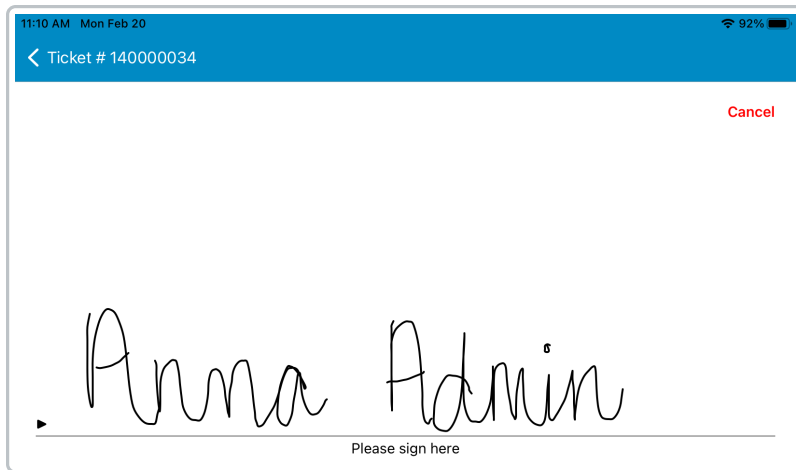
Requested Quantity
 Bags
 Lot Number
 Add
 Select container
 Load Amount 10 Bags
 PRODUCT PICKED ☐

Save Unloaded Ticket Load Selected Product(s)

- **Requested Quantity** – Edit the quantity of product on a ticket. Adjusting the quantity here updates the quantity on the ticket in Agvance.
- **Available for Sale / Calculate** – Selecting **Calculate** displays the amount of product currently available to sell. This is based on a calculation of the current amount on hand plus any amount currently on order (Purchase Orders) less any undelivered quantity.
- **Lot Number / Add** – Edit or add Lot Numbers to a ticket. If Lot Numbers have been established for the product, a listing of available Lot Numbers displays.
- **Select Containers** – This opens the Contain app where a container can be assigned to the product.

Signatures

Signatures can be captured by selecting the **Signature** icon in the upper right-hand area of the window. A *Signature* window displays to use a finger or device pen to sign on-screen. Saving the signature attaches it to the ticket and saves it in Agvance.



Notes

Selecting the **Notes** icon opens a window where notes related to the ticket can be entered. All information entered is saved to the ticket, both in the app and in Agvance, when selecting **Done**. The notes are then displayed in the *Comments* area of the Delivery Ticket and print on the Delivery Ticket.

Save Unloaded Ticket

Tickets may be saved as *Unloaded* for later use if the product has not been picked up/delivered. Save any changes made to the unloaded ticket such as the *Requested Quantity*, adding *Lot Numbers*, or assigning a *Container*. All changes are saved in the app and in Agvance.

Load Selected Product(s)

After all products have been added to the ticket, products are marked as *Picked* and the signature is captured, select **Load Selected Product(s)** to change the ticket to a Loaded Delivery Ticket and make it available for invoicing in Agvance Accounting. Once a ticket is marked as *Loaded*, it is no longer accessible in the Warehouse app.

Customer

Customer contact information displays as well as federal and state permits and any notes related to that customer.

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Cancel Ticket # 140000034

Ticket Customer Fulfillment Documents

Q Add Product

Barry Anderson
2220 N 1000 Rd E
Assumption, IL 62510

217-226-2332
217-226-1256

Ship To:
[Select](#)

Federal Permit:
[Select](#)

State Permit:
[Add Permit](#)

Notes:

[Save Unloaded Ticket](#) [Load Selected Product\(s\)](#)

- **Ship To** – Tap **Select** to choose the Ship To for the ticket.
- **Federal Permit** – Tapping **Select** gives the opportunity to add a Federal Permit.
- **State Permit** – Choosing **Add Permit** gives the opportunity to add a State Permit.

Fulfillment

The *Fulfillment* area includes options to add products, view who requested the ticket, the ordering location, ticket assignment, the Ship From location, and the Available for Sale information.

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Ticket # 140000034

Cancel

Ticket
Customer
Fulfillment
Documents

Add Product

Requested By

Robert Ellis

Ordering Location

01IND

Ticket Assigned to User

Ship From Location(s):

Location(s):

Delivery Charge - Location: :

Bagged Fert 10-10-10 - Location: :

Available for Sale

Delivery Charge

Requested Quantity 1 Lbs

Amount on Hand -160000 Lbs

Available for Sale 0 Lbs

Bagged Fert 10-10-10

Requested Quantity 10 Bags

Amount on Hand 1153 Bags

Available for Sale 0 Bags

Save Unloaded Ticket

Load Selected Product(s)

Assign the ticket or adjust the Ship From Locations by selecting the **Side Arrow**. When assigning the ticket, a visual indicator within the *Outbound* square on the *Home Page* serves as a notification. No other alerts or messages are sent.



Documents

Print or **View** Delivery Tickets, Hazardous Material sheets, SDS, or WPS documents directly from the *Documents* tab. Printing requires a wireless, airprint-capable printer.

Note: Agrian is required for the SDS and WPS documents to be available to print.

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Ticket # 140000034



Ticket

Customer

Fulfillment

Documents

Q Add Product

Delivery Ticket	Print	View
Haz Mat Sheet	Print	View
SDS	Print	View
WPS	Print	View

Save Unloaded Ticket

Load Selected Product(s)

Selecting **Cancel** on any window displays a dialog box stating all unsaved changes will be lost and verifying the cancel.