

Outbound - Warehouse

Last Modified on 11/21/2024 11:25 am CST

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.

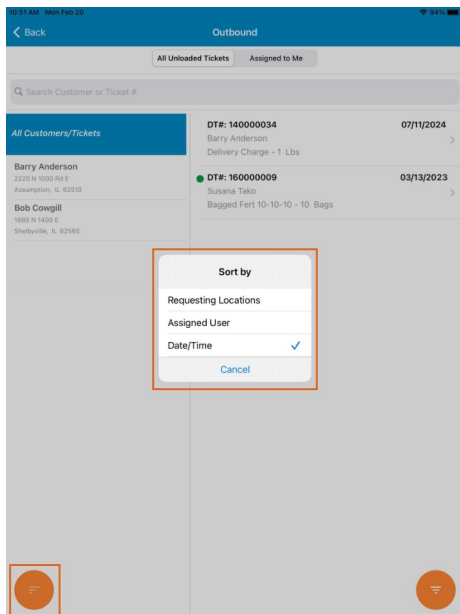
The green dot beside a ticket reflects unloaded tickets that have not yet been opened within the app.

The screenshot shows the 'Outbound' screen in a mobile application. At the top, there is a blue header with a back arrow and the word 'Outbound'. Below the header are two tabs: 'All Unloaded Tickets' (which is selected) and 'Assigned to Me'. A search bar is located below the tabs with the placeholder text 'Search Customer or Ticket #'. The main content area is divided into two columns. The left column, titled 'All Customers/Tickets', lists two customers: 'Barry Anderson' (2220 N 1000 Rd E, Assumption, IL 62510) and 'Bob Cowgill' (1880 N 1400 E, Shelbyville, IL 62565). The right column displays a list of delivery tickets. The first ticket is for DT# 140000034, assigned to Barry Anderson, with a delivery charge of 1 Lbs, dated 07/11/2024. The second ticket is for DT# 160000009, assigned to Susana Tako, for 'Bagged Fert 10-10-10 - 10 Bags', dated 03/13/2023. A green dot is visible next to the second ticket's DT#.

Customer	DT#	Customer Name	Description	Date
Barry Anderson 2220 N 1000 Rd E Assumption, IL 62510	140000034	Barry Anderson	Delivery Charge - 1 Lbs	07/11/2024
Bob Cowgill 1880 N 1400 E Shelbyville, IL 62565	160000009	Susana Tako	Bagged Fert 10-10-10 - 10 Bags	03/13/2023

Sort By

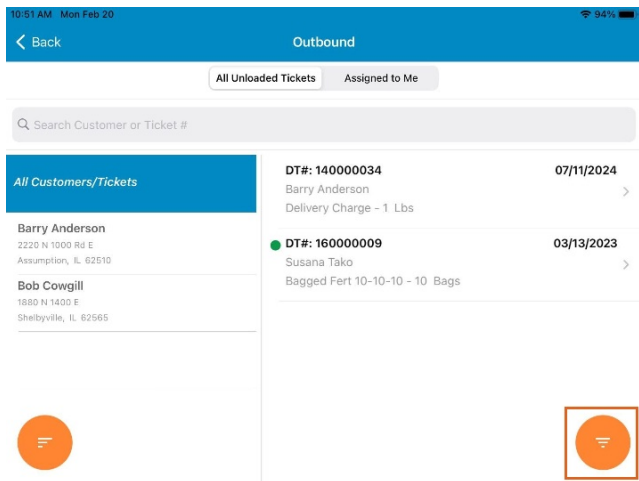
Select **Sort By** on the bottom-left to sort the ticket list.



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

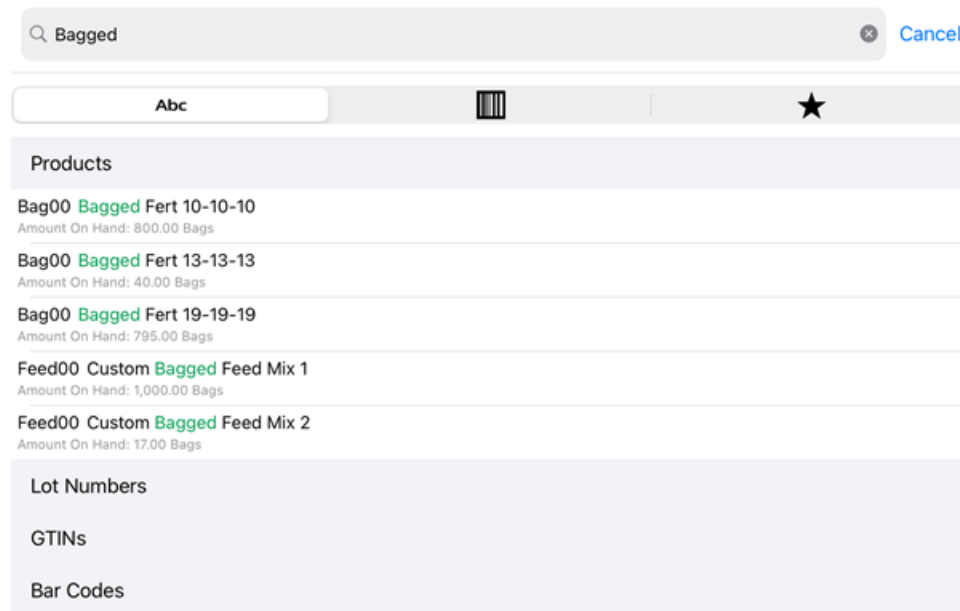
Creating/Editing a Delivery Ticket

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 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.



- **Abc** – Start entering a Product Name. After three characters are entered, the app searches the database for Product Names containing that string of characters. As more characters 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.

Cancel Ticket # 140000034

Ticket Customer Fulfillment Documents

Q Add Product

PRODUCTS TO PICK

○ **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.

Cancel

Anna Admin
Please sign here

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.

Cancel
New Ticket
✎
✎

Ticket
Customer
Fulfillment
Documents

Cancel

Barry Anderson 217-226-2332

2220 N 1000 Rd E 217-226-1256

Assumption, IL 62510

Split Customer Add S-1 Splits

Barry Anderson	60
Barb Wire	40

Ship To: Select

Federal Permit: Select

State Permit: Add Permit

Notes:
Note

Save Unloaded Ticket

Load Selected Product(s)

- **Split Customer** – To add a Customer split, tap **Add**. Be sure the *S-1 Splits* add up to 100%.
- **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 (*Requested By*), the *Ordering Location*, *Ticket Assigned to User*, the *Ship From Location(s)*, and the *Available for Sale* information.

Cancel Ticket # 140000034

Ticket Customer Fulfillment Documents

Q Add Product

Requested By
Robert Ellis

Ordering Location
01IND

Ticket Assigned to User >

Ship From Location(s): >
Location(s): >
 Bagged Fert 10-10-10 - Location: : >

Available for Sale
 Bagged Fert 10-10-10
 Requested Quantity 10 Bags
 Amount on Hand 1153 Bags
 Available for Sale 1103 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 Ticket*, *Haz Mat Sheet*, *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.

10:54 AM Mon Feb 20 Ticket # 140000034 93%

Cancel 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.