Click&Collect

- all you need to know

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Open CNC orders

All CnC orders that have not been picked yet

1

Ready for pick

All CnC orders that are ready for getting picked

24

Ready for hand out

All CnC orders that have been picked and ready for Handout

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Your CnC view

- and how to use it

All CnC orders that have not been picked yet

In the Open CNC orders view – we have most needed actions available. In the following we will go though everthing that you need to run a successful CnC routine.
First things first – at least on a daily basis, go check the Open CNC orders overview – take care of orders that are ready for picking route and keep yourself updated about incoming CnC orders

- **Generate picking list**: The picking list is essential for us to start up a picking route. Easiest option to generate it is on the "Generate picking list" button (Button available in Open CNC orders and Ready for Pick). When the picking list is generated – a "Pick" will appear.

- **Pick**: When you are ready to go pick the item button (Button available in Open CNC orders and Ready for Pick) – start by clicking on the "Pick" and make a print of the picking list: Print picking list.pdf and when you have found the items for the order – Pick the items: Pick a click and collect.pdf

- **Delete picking list**: Can be used to delete a picking list – could sometimes be needed if the customer changes their mind, since the picking list locks the items to the sales order.

- **Automarking**: Can be a very helpful button from time to time, if the system did not update reservations on the sales order. Can not take care of all situations, but most.

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All CnC orders that have not been picked yet

All CnC orders that are ready for getting picked

Finance and Operations

Generate picking list   Pick   Delete Picking list   Automarking   **Options**   🔎

Open click and collect orders

Standard Retail View * ⌄

Overview   Sales order

Display dimensions

	Sales order	Name	Product name	Quantity ▽	Picked	Deliver remain...	Physical reserved	Ordered reserved	CC comment
✓			Wow pedestal low|Grey glass	1,00		1,00			
			Float Vase|Clear	2,00		2,00			
			Solitaire Vase|Grey/Silver	1,00		1,00			

- **Quantity**: The amount of items the customer ordered

- **Picked**: The amount of items that have been picked

- **Delivery remainder**: The amount of items that has not been handed out to the customer

...Before we proceed with the remaining fields – the following is very very important, so please stay tuned and go to the next page☺

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✓			Wow pedestal low|Grey glass	1,00		1,00			
			Float Vase|Clear	2,00		2,00			
			Solitaire Vase|Grey/Silver	1,00		1,00			

- **Physical reserved**: Is when you have the items on hand to supply the sales order request. Physical resevered is essential, because it allows the order to be ready for pick. Items on CnC orders can only reach "Physical reserved" when the item is on hand on your main store warehouse. The reservation will not validate against your exhibition warehouse (or outlet for that matter)

- **Ordered reserved**: CnC items reserved on a store delivery – check your Transfer orders/ Purchase lines to check when it arrives in your store

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Finance and Operations

Generate picking list   Pick   Delete Picking list   Automarking   **Options**   🔍

Open click and collect orders

Standard Retail View * ∨

Overview   Sales order

Display dimensions

	Sales order	Name	Product name	Quantity ▽	Picked	Deliver remain...	Physical reserved	Ordered reserved	CC comment
✓			Wow pedestal low|Grey glass	1,00		1,00			
			Float Vase|Clear	2,00		2,00			
			Solitaire Vase|Grey/Silver	1,00		1,00			

- **CC comment**: Make it easy for yourself and your collegues and add a relevant note about the order. Could be about when an incoming (Ordered reserved) item is expected to arrive in the store

  - Add it from the Sales order line

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Ready for hand out

All CnC orders that have been picked and ready for Handout

Finance and Operations

Unpick Hand Out Options 🔍

Open click and collect orders ready for delivery

Standard Retail View ⌄

Overview Sales order

Display dimensions

◯	Ship date	Sales order	Name	Product name	Quantity	Picked	Deliver remainder
	28-08-2022			Classic Cushion 50x50 cm|Qual, Light Grey Melange	2,00	2,00	2,00
	28-08-2022			Classic Cushion 50x50 cm|London, Light Beige	2,00	1,00	1,00
	11-09-2022			Textile Protector-NEW	2,00	2,00	2,00

The"Hand out" tile have 2 buttons exclusive for this view

- **Unpick**: If a customer regrets their purchase, before the item has been handed out – use the "Unpick button to start the procedure. Remove item and return money.pdf

- **Hand out**: Final step of CnC order before the items will leave the store and get a new home. Hand out click and collect.pdf

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When Click&Collect bugs you

Solutions for issues

- Reservation

- Credit limit exceeded

- Quantity has been reduced to 0,00.
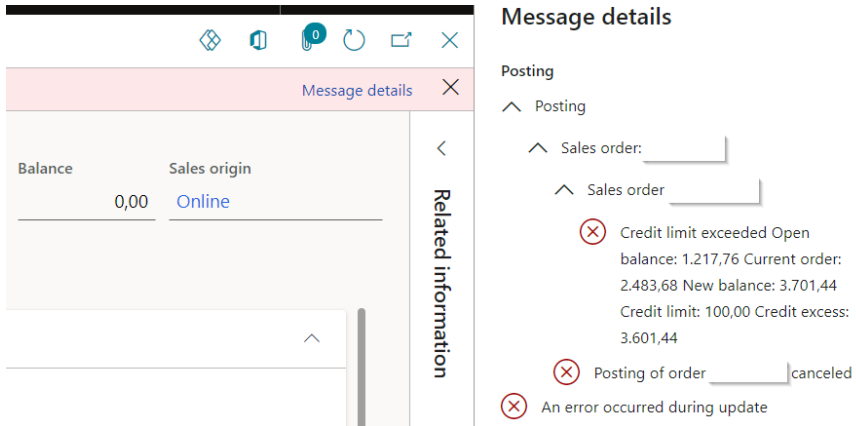
- Less errors

Reservation

Sometimes – you will experience that you are unable to start your CnC picking route. Most cases, it is due to missing or wrong reservation.

There are a few things that you can do to prevent most cases and then a few things that can help solve a case, when it did not work.

- **Store Delivery**: Maybe strange to mention it here in a CnC guide;) However Store delivery has major effect on our inventory in general. As mentioned before – if an item is not received – it will not get on hand and thereby be available for sales, CnC etc. Make sure to follow up tightly every week

- **Inventory in general**: Always highly important. Towards Click&Collect – it is important that you are in control of your ”sales” stock and what you use for exhibition ([How to handle smaller items used in the showroom.pdf](#))

- **Open CNC orders tile**: Check your tile ”Open CNC orders” multible times a day. If you see CnC lines that have no reservation – Click on ”Automarking”

- **Item is On hand and Automarking does not help**: We have some cases where the system for some reason is unable to detect, that an item is in fact on hand and thereby fails to reserve – for this issue we have one workaround guide to rule them all: [Pick items with reservation error.pdf](#)

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Creditlimit exceeded

Maybe some of you have had the pleasure of the error message below... It is strange, since the sales order is paid and in balance

Use this simple guide to work around the error: Workaround guide - CnC order creditlimit exceeded.pdf

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Quantity has been reduced to 0,00

Finance and Operations

Generate picking list   Delete Picking list   Automarking   **Options**

ⓘ Posting   Posting Sales order: ▭▭▭▭   Quantity has been reduced to 0,00.
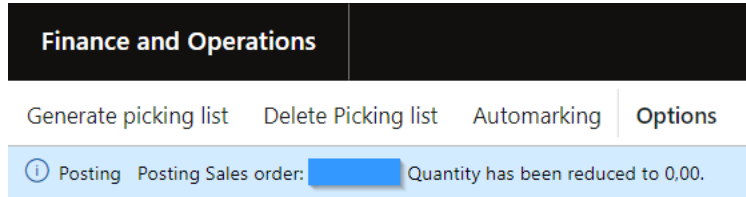
Sometimes you get this notification when you try to generate a picking list. It is not an error☺ - it is just a message telling you (in it´s own D365 language) either that:

- Hey – you are trying to generate a picking list, but the order is still "Ordered reserved"

- Hey – did you check that the CnC lines are reserved? - because I can not find any items ready for picking route

- Hey – you already made a complete picking list for this CnC order – no need for an extra

In rare cases – the message can also show up if we try to unpick items with no active picking list connected to it. (Check next slide - **Textbox messages**)
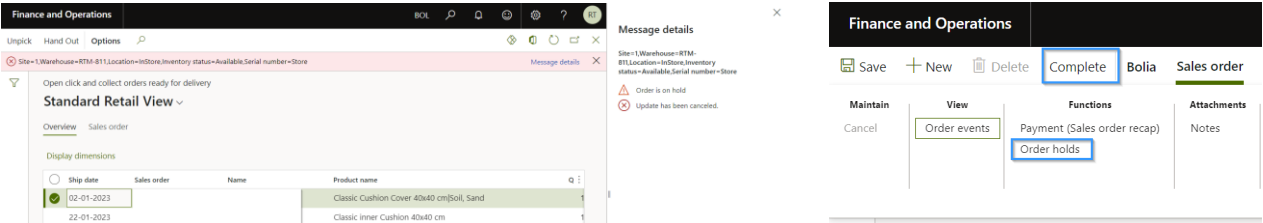
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Less errors

On Hold.. But there is no Hold?

When you get this error message – it can mean 2 thing. The order actually have an order hold, that should get cleared, but 9/10 times it is because "Complete" is open on the sales order. This would usually happen if you want to modify the orderline, before "Unpick"

Textbox messages – read them☺

These messages is really important to read.. Many of us tend to click without ever reading what you say "Yes" or "No" to
When you get the message below which is connected to CnC orders – you must chose correct..
Output order is D365 for Picking list. If you say "Yes" to this while having other picked items on the order – you will remove the possibility to unpick them later on if needed, since the picking list is gone. In short - always click "No" to this specific message.

Extra information

Tips & tricks

If you want to know **which Transfer order an "Ordered reserved" item is connected to** – find the Transfer order number on the sales order – Line details > Product > Reference number:

If you have an item physical in your hand, but the CnC order is still "Ordered reserved" – take action and get the item received

Line details

| Bolia | General | Address | Product | Delivery | Financial dimensions | Claims |

TRACKING DIMENSIONS	STORAGE DIMENSIONS	Location	ITEM REFERENCE	Reference number
Serial number	Warehouse	InStore	Reference type	100052002

Picking list(s) – can be found in "Pick and pack" > Journals on the sales order

| + New | 🗑 Delete | Bolia | Sales order | Sell | Pick and pack |

Generate	Journals
Generate picking list	Picking list overview
Pick	Hand out documents

There can be multible CnC pickinglists in the overview – and you can enter the picking route by "Picking list registration"

| + New | 🗑 Delete | Preview/Print ∨ | Planet Press ∨ | Picking list registration | Opt |

∇	🔎 Filter	700493867 : KIRSTEN MC CLELLAN S

Picking list

W00183427
Sales order
700493867

Customer	Reference
W00183427	Sales o

W00183427
Sales order
700493867

Properties

W00183427

Lines

What about marking?

"Marking"… Is for sure important – especially when we order a new sofa etc. for our customers. As you might already noticed if you read the previous slides - for instant and Click&Collect, rather have focus on reservation.

Though your focus should be on Reservation – Marking still has an effect on your sales order lines – here is the explaination on how Marking is connected to Reservation

Sales order line is fully marked = Sales order is Physical/Ordered reserved on the requested qty.

Sales order line is partially marked = Sales order is not fully Physical reserved on requested qty. This can happen if we are not in control of our stock on hand – or the system could not find stock on hand – on CnC orders you can check if "Automarking" will help - otherwise picking route can be accomplished by: Pick items with reservation error.pdf

Sales order line has no marking = Sales order is not Physical/Ordered reserved on any of the the requested qty. This can happen if we are not in control of our stock on hand – or the system could not find stock on hand – on CnC orders you can check if "Automarking" will help - otherwise picking route can be accomplished by: Pick items with reservation error.pdf

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More guides for CnC fun

- If customers changes their mind on how many mugs etc. they want to buy – or in the unlikly situation that our stock was incorrect – use this guide if you need to adjust the quantity: Change quantity and return money.pdf

- If customers changes their mind and want to cancel their CnC purchase - or in the unlikly situation that our stock was incorrect, use this guide to remove the CnC sales order line: Remove item and return money.pdf

- Our customers will get text messages to notify them, when we have picked their order or a friendly reminder, to pick up their items. If you need to send a manual text message to your customer – you can do it from D365 sales order: Send manual SMS.pdf

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That´s it

- now you are a Click&Collect master

… but if you need some inputs for your routines – check this:

Click&collect day to day structure.pdf

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