



Picking Slips — Full Workflow

A guide to picking a Sales Order line by line, and closing off the picking slip once everything has been picked

Introduction

A Picking Slip is the working document your warehouse team uses to fulfil a Sales Order — it lists every item that needs to be pulled from stock, and lets you record exactly which store (and, where relevant, which lot number) each item was picked from. As each line is picked, Data Fusion moves the stock out of that store immediately, so your on-hand quantities are always up to date.

This guide covers the normal, day-to-day path: picking each line and closing off a slip once everything on it has been fully picked. If a slip can't be fully picked because there isn't enough stock, see the separate guide "Part Deliveries & Back Orders on Sales Orders" for how short-picks, back orders, and cancelled balances are handled.



Before You Begin — Prerequisites

- A Sales Order must already exist, and a Picking Slip must have been generated for it.
- Stores and, if your company uses them, lot numbers must already be set up against the items being picked.
- Whether you see a Barcode field and a manual quantity box depends on your company's settings — some companies pick by scanning, others simply select a store and the full ordered quantity is picked automatically. Both are covered below.

Key Terms — Glossary

Term	What It Means
Picking Status	The picking slip's own progress label, shown in the "Picking Status" field. Moves through Captured, Started, Picked, and finally Complete as lines are picked and the slip is closed off.
Sales Order Status	A completely separate status, shown next to the Sales Order number (e.g. Captured, Invoiced, Partially Invoiced, Cancelled). This is the Sales Order's own lifecycle and is not the same thing as Picking Status — don't confuse the two.
Order_Qty	The quantity originally ordered on that Sales Order line.
Qty_Left	A read-only column showing what's still outstanding on that Sales Order line, useful if the line has been partly picked before.
Store (QOH)	The dropdown you use to choose which store to pick the item from. Each store option shows its current quantity on hand in brackets.
Lot Number	For lot-tracked items only: the dropdown you use to choose which lot to pick from, showing the quantity on hand for that lot.
Done	The checkbox on each line that marks it as picked. Ticking it (and saving) moves the stock out of the chosen store.
Closed Off / Complete	The picking slip has been finalised. Once closed off, its lines can no longer be changed.



The Full Workflow

1. Open the Picking Slip for the Sales Order you want to fulfil.
2. Optionally, click **Issue** (the red + icon next to Issued To) to record that the slip has been handed to a picker — this stamps the Issue Date and marks the slip as being worked on. This step is optional; you can go straight to picking lines without it.
3. Pick each line. What you do depends on how your company is set up:
 - **Choose the Store** to pick the item from. Each store shown in the dropdown lists its current quantity on hand.
 - **If the item is lot-tracked**, also choose the Lot Number to pick from. If a single line needs to be split across more than one lot, click the small + icon next to the line to fulfil it from multiple lots at once.
 - **If your company scans barcodes**, scan (or type) the item's barcode into the Barcode field — each scan adds to the Pick_Qty for that line. Otherwise, the full Order_Qty is picked automatically once you choose a store, with no separate quantity entry needed.
 - **Tick "Done"** once the line has been picked. This saves the line and moves the picked quantity out of the chosen store straight away — you don't need to wait until the whole slip is finished for stock to update.
 - You can also use the "Done" checkbox in the column header to tick and save every line on the slip in one go, instead of one at a time.
3. Repeat for every line on the slip. The Picking Status field updates itself automatically as you go — see "Understanding the Picking Status Lifecycle" below.
4. Once every line is ticked Done, click "Close off Picking Slip".
5. Confirm the prompt: "Mark this picking slip as fully picked and close it off?" — choose Yes, close off.
6. The slip closes: Picking Status is set to Complete, all lines become read-only, and you're taken back to the Sales Order screen, ready for it to be invoiced.

Note: If some lines can't be fully picked, closing off takes a different path — a short-pick prompt instead of the one above. See "Part Deliveries & Back Orders on Sales Orders" for that flow.

Understanding the Picking Status Lifecycle

The "Picking Status" field on the slip moves through four stages on its own — you don't set it directly:

- **Captured** — the slip has been created but no lines have been picked yet.
- **Started** — at least one line has been ticked Done and saved, but not all of them.
- **Picked** — every pickable line has been ticked Done and saved.
- **Complete** — the slip has been closed off using "Close off Picking Slip". This is final.

This status recalculates itself every time you save a line, based on how many lines are currently ticked Done — so if you untick a line and save again, the status can drop back down (for example from Picked back to Started). Nothing is locked in until you actually close off the slip.

⚠ Important: "Picking Status" (Captured / Started / Picked / Complete) is not the same field as the Sales Order's own status shown next to the Sales Order number (Captured / Invoiced / Partially Invoiced / Cancelled). The Sales Order status reflects invoicing, not picking, and isn't changed by anything you do on the picking slip.

Some companies use a more advanced, station-based tracking mode instead of this simple lifecycle, where the status shows a workstation name (e.g. a packing or dispatch stage) rather than Captured/Started/Picked. If that applies to your company, your administrator can tell you which stations your slips move through.

Common Mistakes to Avoid

- **Forgetting to tick "Done" (and save) on a line.** Until a line is ticked and saved, its stock hasn't moved and it won't count towards the Picking Status.
- **Picking a lot-tracked item without choosing a lot number.** Data Fusion will block the save and ask you to select a valid lot first.
- **Trying to pick more than is on hand.** If there isn't enough stock in the chosen store (or lot) for a physical item, the save is rejected with an "Insufficient quantity" message.
- **Expecting to edit a slip after closing it off.** Once a slip is Complete, its lines are locked — plan your final check before clicking "Close off Picking Slip", not after.
- **Closing off before every line is fully picked.** That takes you into the short-pick / back-order flow instead of a straightforward close-off — see "Part Deliveries & Back Orders on Sales Orders".

Picking on Mobile

Picking slips can also be picked and closed off from Data Fusion's mobile app, using the same stores, lot numbers, and stock movements as the web version. See "The Mobile / Scanner Version" guide for details on working from a phone, tablet, or handheld scanner.