

SouthWare Order Picking/Shipping via Handheld Quick Reference - Operator

- **To Login**
Click on the appropriate link or bookmark as set up by your administrator and enter your name/password. If you both stage and ship you may then select the mode for this login session.
- **To Start a Ticket**
Scan or enter the ticket number in the ticket field.
- **To Record Items**
In the "Enter" section scan or enter an item number. The program verifies that the item is valid and on the ticket.
 - If you are using the quantity 1 mode then quantity 1 is assumed and you may scan the next item unless tracking/serial numbers are needed.
 - If quantity is needed the screen will ask for quantity.
 - If serial or tracking numbers/quantities are needed the screen will ask for them.
- **To Complete a Ticket**
Click on the "Done" link at the top of the page to finish entry for a ticket. The program will validate that all items are complete and give a message if the items are not complete. When done the screen will display the ticket entry screen so that you may start a new ticket or log off.
- **To Undo the Last Item**
When you enter an item the screen shows the last item and displays an "Undo" button. This will undo the last item/quantity entered.
- **To Review the Items for a Ticket**
Click on the "Review" link at the top of the page. This shows a list of the items for the ticket with the quantities entered.
- **To Clear Shipping Quantities for an Item**
From the Review list you may click on the "Clear" button beside an item. This will clear the shipping quantity.
- **To View Shipping Address and Method**
Click on the "Shipping" link at the top of the page. This displays the address, PO, and ship via for the order.
- **To Log Off**
Click on the Logoff link to end your session and free up your license seat. The resulting page includes a link to start a new session.

SouthWare Order Picking/Shipping via Handheld Quick Reference - Manager or Office Operator

- **To Set Up the Login Page on an Operator's Handheld**
The NetLink request for technician login is "wihhordshplogin". The URL would be "http://yourNetLinkpath?request_id=wihhordshplogin" (with an optional "&co_id=xxx" if you use multi-company). You should make it simple for the operator to access this by adding a bookmark, favorite, link, etc. that calls this URL.

- **To Prepare an Order for Shipping Entry**
Simply print the picking ticket and give it to the operator. Printing the picking ticket automatically creates the pick/ship records for the ticket.

- **To Set Up Logging of Operator Activity**
In the Administrator portal you may use the Setup tab to configure the number of days of activity to retain. Then from the Operator tab you may zoom to the maintenance to activate logging for the operators to log.

- **To Review the Logged Activity for an Operator**
You may use the Administrator portal to view today's activity for an operator. Click on an operator in the Operator tab list to view the report of today's logged activity.