



Pick and issue printing FINET quick reference guide

Introduction

Pick and Issue (**PI**) transactions are utilized to manage Stock Requests (**SRQ**) which identify commodities that need to be processed in the warehouse. The commodities may be picked and issued, transferred (**TI; TR**) or sold via an Over-the-Counter (**OC**) transaction. Understanding of each transaction and the purpose is not covered here but can be requested.

When picking and issuing items, warehouse workers will use a printed form with the respective quantity to recognize what to grab, where to find it and how much. Until recently, this form could be printed AFTER copying forward from an SRQ to a PI then to the Issue Confirmation (**CI**) or what was picked. The only thing changing is the ORDER in which these events occur.

Instructions

1. Select **Transaction Catalog** from the home page
2. To create a PI transaction, click on the **Create** button.
3. Enter the following:
 - **Transaction Code:** PI
 - **Department:** Your department code
 - **ID:** Your prefix

Create Transaction

5 Continue Cancel

3

* Transaction Code Transaction Dept Transaction Unit

PI 410


* Transaction ID


24

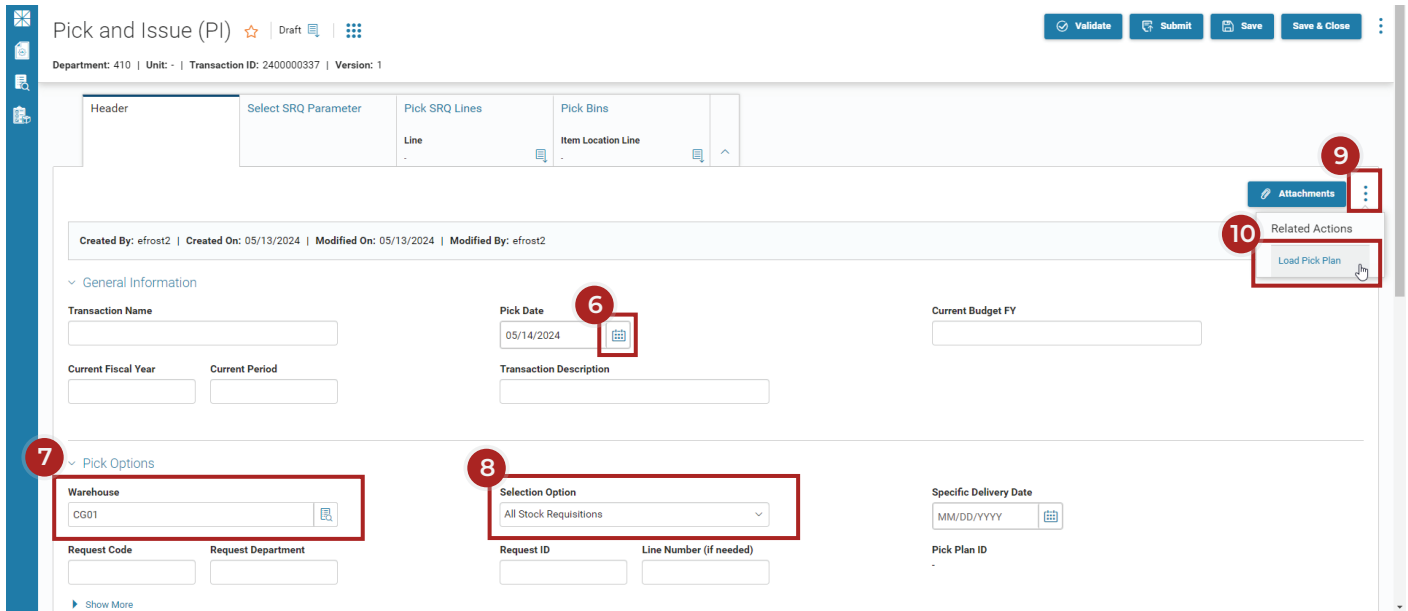
4 Auto Numbering

Show More

* Required fields

6. To avoid any problems later, always fill in the **Pick Date** () when entering the PI transaction.
7. Enter the **Warehouse** from which the SRQ items will be picked.

8. From the **Selection Options** drop-down menu, select the **All Stock Requisitions** option.
9. Click on the **3-dot menu** () in the upper-right corner next to the attachments button.
10. Select **Load Pick Plan**. FINET will populate all available stock requisitions from this warehouse.



Pick and Issue (PI) Validate Submit Save Save & Close

Department: 410 | Unit: - | Transaction ID: 2400000337 | Version: 1

Header | Select SRQ Parameter | Pick SRQ Lines | Pick Bins

Line | Item Location Line

Created By: efrost2 | Created On: 05/13/2024 | Modified On: 05/13/2024 | Modified By: efrost2

General Information

Transaction Name | Pick Date: 05/14/2024 | Current Budget FY



Current Fiscal Year | Current Period | Transaction Description

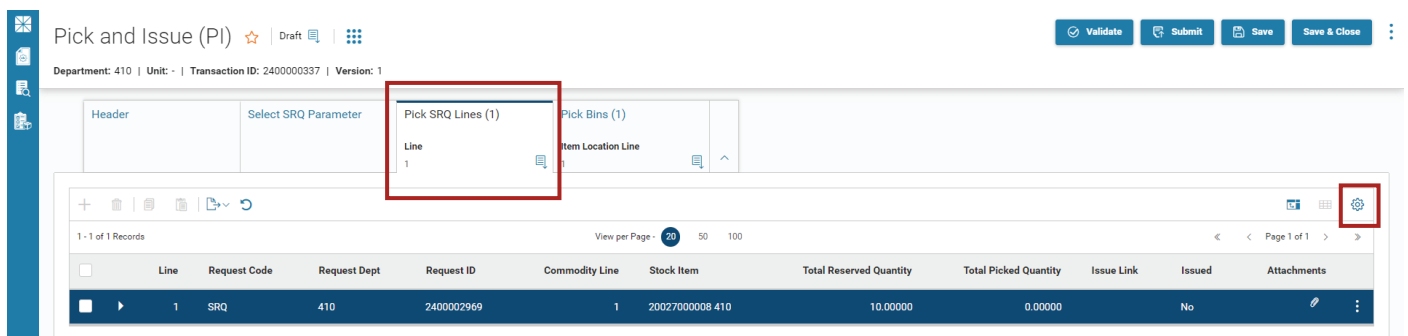
Pick Options

Warehouse: CG01 | Selection Option: All Stock Requisitions | Specific Delivery Date: MM/DD/YYYY

Request Code | Request Department | Request ID | Line Number (if needed) | Pick Plan ID

Show More

Click on the **Pick SRQ Lines** tab, to see the details. This tab provides all the information you need to pick the items. You don't easily see what you're looking for, you can expand the line (). If you want to see more information, click on the **Gear** () icon.



Pick and Issue (PI) Validate Submit Save Save & Close

Department: 410 | Unit: - | Transaction ID: 2400000337 | Version: 1

Header | Select SRQ Parameter | Pick SRQ Lines (1) | Pick Bins (1)

Line | Item Location Line

1 - 1 of 1 Records | View per Page: 20 50 100 | Page 1 of 1

Line	Request Code	Request Dept	Request ID	Commodity Line	Stock Item	Total Reserved Quantity	Total Picked Quantity	Issue Link	Issued	Attachments
1	SRQ	410	2400002969	1	20027000008 410	10.00000	0.00000	No		

Specific Stock Requisition does the same as a copy forward. It ties one SRQ to a PI. The fields you need to populate are the **Request Code**, **Request Department** and **Request ID** . If you do not see the desired fields, you can find more fields under the **Show More** option.

Every time you enter pick criteria you will need to Load Pick Plan again. When you load the Pick Plan, FINET will clear everything presently on the Pick SRQ lines and add the new items. Because of this, you can use different search criteria within the same transaction.

11. Validate and Submit

Pick and Issue (PI) ☆ | Draft | [Grid Icon]

Department: 410 | Unit: - | Transaction ID: 240000337 | Version: 1

1 of 1: Transaction validated successfully

Header	Select SRQ Parameter	Pick SRQ Lines (1)	Pick Bins (1)
		Line 1	Item Location Line 1

12. On Final version 1 document, select same 3-dot menu (⋮) to Print Pick Plan

Pick and Issue (PI) ☆ | Final | [Grid Icon]

Department: 410 | Unit: - | Transaction ID: 240000337 | Version: 1

1 of 1: Transaction submitted successfully

Created By: efrost2 | Created On: 05/13/2024 | Modified On: 05/13/2024 | Modified By: efrost2

Attachments [3-Dot Menu]

- Load Pick Plan
- Print Pick Plan

General Information

Transaction Name	Pick Date	Current Budget FY
-	05/13/2024	2024

Pick Options

Warehouse	Selection Option	Specific Delivery Date
CG01 DOC CUJCF SS - GENERAL WAREHOUSE	All Stock Requestions	-

Request Code	Request Department	Request ID	Line Number (if needed)	Pick Plan ID
-	-	-	-	PI-410-240000337

13. Go to Forms from top-right, select the 3-dot menu and see that document has fully generated.

Pick and Issue (PI) ☆ | Final | [Grid Icon]

Department: 410 | Unit: - | Transaction ID: 240000337 | Version: 1

1 of 2: Document print job was successfully submitted.

Primary Actions [3-Dot Menu]

- Forms

Other Actions

- Additional Transaction Information
- Future Transaction Triggering
- Schedule
- Send Page
- Download Transaction
- Activate
- Deactivate
- Archive

Research

- Transaction References
- Track Work In Progress
- Transaction History
- Posting Line Inquiry

General Information

Transaction Name	Pick Date	Current Budget FY
-	05/13/2024	2024

Pick Options

Warehouse	Selection Option	Specific Delivery Date
CG01 DOC CUJCF SS - GENERAL WAREHOUSE	All Stock Requestions	-

Request Code	Request Department	Request ID	Line Number (if needed)	Pick Plan ID
-	-	-	-	PI-410-240000337

View Forms ☆

Additional Actions
Print Page

Filters

Transaction Code: PI
Transaction Dept: 410
Transaction ID: 2400000337

Show More Apply Reset

Grid Actions

1 - 1 of 1 Records View per Page: 20 50 100 Page 1 of 1

Status	Description	Transaction Code	Transaction Dept	Transaction ID	File Name
Pending	-	PI	410	2400000337	efrost2_3628990_PI_410_2400000337_1

14. Once it has been downloaded or printed, return to PI and complete modification.
15. Verify that CI document has been created after version 2 of PI has been **validated** and **submitted**.