

# Picklist Workflow

04/30/2025 3:19 pm CDT

## Overview

Picklists can increase efficiency by generating a summarized list of product quantities needed to fill selected orders. Picklists can be also printed as a PDF document or exported to Excel and given to the shipping department for accurate picking, packing, and shipping. In this article, you will learn how to generate, manage, and filter picklists in Sellercloud. You will also learn how to filter Shipbridge based on assigned split picklists.

In Sellercloud, picklists can be generated based on warehouse, meaning that the inventory and pick quantity displayed will be based on the inventory and pick quantity available at the specified warehouse. This is controlled in **Client Settings** by checking **Enable Pick List Generation by Warehouse**.

You will not be able to generate a Picklist for a [Warehouse](#) of the following types: FBA, WFS, Newegg, and Interim.

Orders with [shadow products](#) will have parent products in the picklist. Similarly, kit products will have their child components in the picklist.

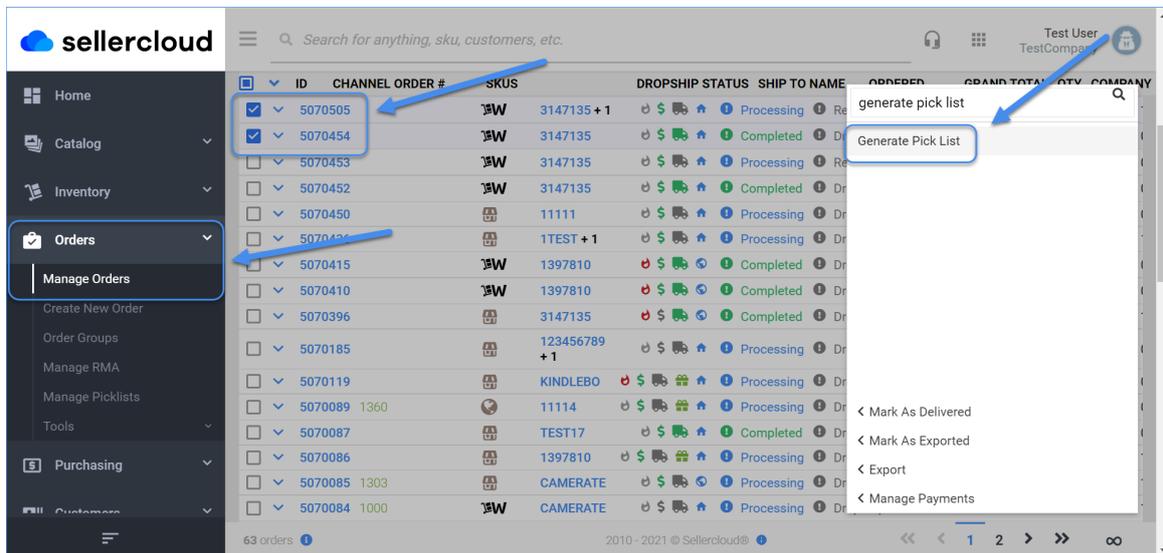
## Generate Picklists

With Sellercloud, you can generate picklists manually or automatically.

### Manually

To generate picklists manually:

1. Go to **Orders > Manage Orders > Select orders**.
2. Click on **Action menu > Generate Pick List**.



3. Title your Picklist. Choose a Warehouse.

GENERATE PICKLIST ✕

Title \*

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Warehouse \* Select ▼

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CANCEL SAVE

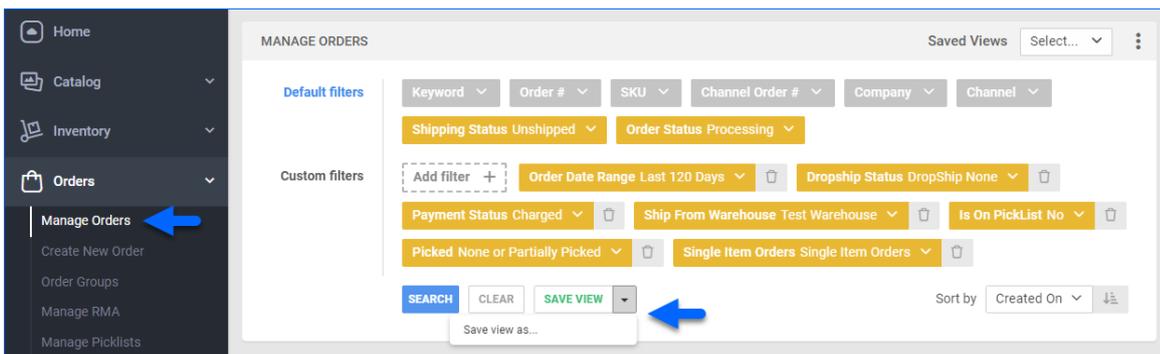
## Automatically

For this purpose, you need:

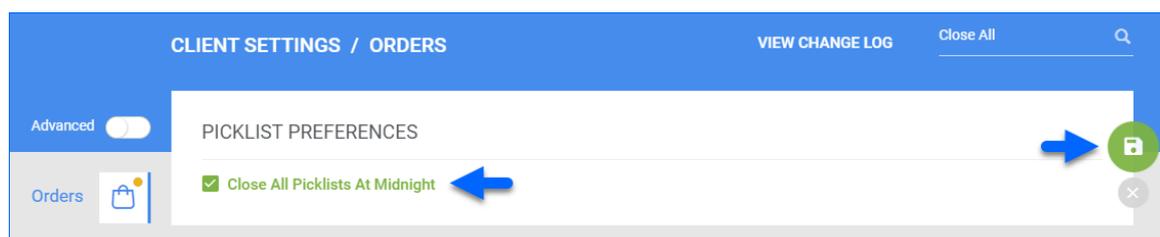
- A [Saved View](#) for Orders
- A [Scheduled Task](#) of the PickList Generate type

To create the Saved View:

1. Go to **Orders > Manage Orders**.
2. Add the following filters:
  - a. **Order Date Range** = Preferred date range, usually Last 120 days
  - b. **Shipping Status** = Unshipped
  - c. **Order Status** = Processing
  - d. **Dropship Status** = Dropship None
  - e. **Payment Status** = Charged (If the picklist does not include wholesale orders)
  - f. **Ship From Warehouse** = One specific warehouse, to have a unique picklist per warehouse
  - g. **Is On Picklist** = Not In Open Picklist or No (Optional, add it if you use the **Close all picklists at midnight** setting - check for more information below)
  - h. **Picked** = None or Partially Picked (If you use Skustack)
  - i. **Single Item Orders** = Single Item Orders or Multi Item Orders (For separate picklists for single-item and multi-item orders. See [Picking Order Items](#) for more information)
3. Click the **arrow icon** next to **Save View** and select **Save view as...**
4. Name it and click **Save**.



To close all picklists every night and create new ones in the morning that include any unshipped orders, enable the [Client Setting Close All Picklists At Midnight](#) and then set the [Is On Picklist](#) filter to **Not In Open Picklist**.



You can always add more filters to separate your picklists by channel, product group, and so on, but the filters listed above are essential.

Next, to create the Scheduled Task:

1. Go to **Settings**.
2. Select **Scheduled Tasks > Manage Scheduled Tasks**.
3. Click the **Create New Scheduled Task +** button on the bottom right, and:
  - a. Set the **Task Type** to **PickList Generate**.
  - b. Enter a **Task Name**.
  - c. Select the **Company**.
  - d. Set the **Start Time**.
  - e. Click **Create**.
4. The following message appears at the bottom of your screen: "Scheduled task created successfully. **Click Here** to configure the task details." – click the link.
5. Click the **Edit** button on the top right.
6. In the **Details** section:
  - a. Click the **User ID** menu and select your ID.
  - b. Click the **Saved Search** menu and select the saved search you created earlier.
  - c. Set the **Picklist Title** as you prefer. You can use the following placeholder `{yyyy}{MM}{dd}{HH}{mm}` to populate the name with the picklist creation date.
  - d. Optionally, choose if you want to **Export Picklist In PDF Summary Format**, **Print PDF Invoice**, or **Export Picklist In Excel Format**.
  - e. Select the **Warehouse**.
  - f. Optionally, check **Enable Max Order Per Picklist** and set the number of **Max Orders Per Picklist**. This way, the task creates a picklist with child picklists based on the specified limit. Without this option, a default value will be loaded from the [Client Setting Default Max. Number of Orders/Shipper](#).
7. This task will create picklists on the **Manage Picklists** page regardless of the **Export To** option, but you can also export the picklist in **PDF** or **Excel** to one or more **email addresses** or to an **FTP**.
8. In the **Frequency** section, specify when the task will run.

9. In the **General** section, click the **Enable** button.

10. Click **Save** on the top right.

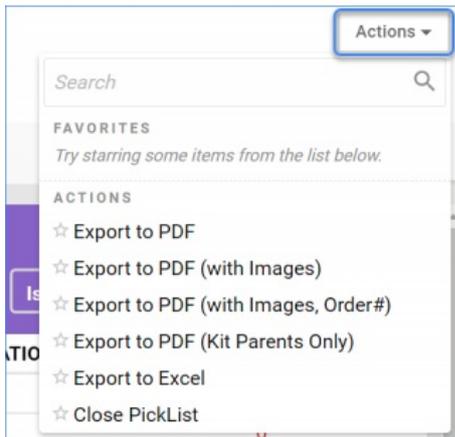
The screenshot displays the configuration interface for a Picklist Task, divided into several sections:

- GENERAL:** Task Name: Picklist Task; Task Type: PickList\_Export; Company: Thirsty Tea; Priority: Normal.
- DETAILS:** User ID: nikolay.i@sellercloud.com; Saved Search: Picklist Auto-Generation; Picklist Title: Picklist (yyyy)(MM)(dd)(HH)(mm). Options include: Export Picklist In PDF Summary Format, Print PDF Invoice, Export Picklist In Excel Format (selected), Print PDF Invoices, PDF Invoice Plugin, Warehouse, Max Records To Export, Export File Name, Enable Max Order Per Picklist (checked), and Max Orders Per Picklist: 20.
- EXPORT OPTIONS:** Export To: None.
- FREQUENCY:** Start At: 07/20/2023 12:00 AM. Recurrence: Custom (selected). Run on these day(s): Mo, Tu, We, Thu, Fri, Sa. Time of Day: 08:00 AM. Existing Times: (empty). Expire Schedule: Never (selected).
- EMAIL ALERTS:** Send Email Alerts Upon Completion (checked). Send Task Success Email To (Separate By Semicolon). Send Task Failure Email To (Separate By Semicolon). Send Task Failure Email Even If No Records Found (unchecked).

## Manage Picklists

To manage picklists:

1. **To access picklists:** Go to **Orders > Manage Picklists**.
2. **To close picklists:** Select them > Click on the **Action** menu > **Close picklists**.
3. **To export a picklist:** Open your picklist > Click on **Actions** > **Select an option**.



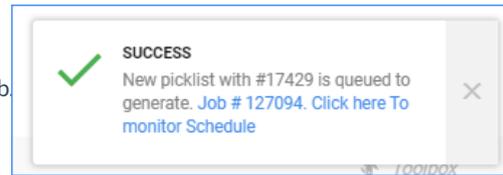
4. **To split picklists:** When dealing with a high volume of orders, trying to load all the orders across every shipping station risks a system overload. To mitigate this risk you can split your picklists by number of orders per shipper.

- a. Open your picklist > **Products** panel > Select items. Use the icon in the upper-right corner to divide the picklist.

The screenshot shows the 'PRODUCTS' panel with a table of items and an 'APPLY' button. The table has the following columns: SKU, ITEM, QTY, QTY PICKED, LOCATION, PACKAGE, PRODUCT WEIGHT, PURCHASER, REPLACEMENT COUNT, INVENTORY, and UPC.

SKU	ITEM	QTY	QTY PICKED	LOCATION	PACKAGE	PRODUCT WEIGHT	PURCHASER	REPLACEMENT COUNT	INVENTORY	UPC
<input checked="" type="checkbox"/> 00031T12	00031T12	1	0			0		0	0	
<input type="checkbox"/> 0	test	66	66			0	abe@sellercloud.com	38	493	886798001296

b. Click the link in the notification to view your queued job



5. You can also **Divide Picklist Between Pickers** from the Action Menu.

## Picklist Columns and Filters

Picklists will generate with the following default columns:

- **SKU** – An item’s unique identification number.
- **Item** – Name of the product.
- **Qty** – Quantity of units to pick to fill selected orders.
- **Location** – Location of the item in the warehouse (if set on the product’s **Home** page).
- **Package** – Shipping package type (if set on the product’s **Shipping Preference** page).
- **Inventory** – The available quantity you have on hand to pick: Aggregate + Unshipped = Inventory. This is not necessarily the total physical quantity.
- **UPC** – The item’s barcode.

Additional columns can be enabled from **Client Settings**:

- **Replacement SKU**
- **Replacement SKU LOC**
- **Weight**

The following filters can be used to filter SKUs and quantities on the picklist:

**Filter**

**Description**

**Has Available Inventory**

- **All** – Displays all items regardless of whether there is inventory to fill the orders.
- **Yes** – Displays products and pick quantity that can fill orders completely. For example, if **Item A** has a quantity of 5 and the picklist has one order for 6 units of that product, **Item A** will not display. If there are two orders for 3 units ( $2 \times 3 = 6$ ) then **Item A** will display in the grid with a pick quantity of 3 only, because there isn’t enough quantity to fill the second order. Older orders will take precedence over newer orders.
- **No** – Displays products and pick quantity without enough inventory to fill the orders. For example, if **Item A** has a quantity of 5 and the picklist has one order for 6 units of that product, **Item A** will display. If there are two orders then **Item A** will display in the grid with a pick quantity of the unfillable quantity. Older orders will take precedence over newer orders

This filter checks the Aggregate (sellable) quantity of the SKUs, and their shadows, within the warehouse specified on the Picklist.

**Available in Warehouse of Picklist**

- **All** – Displays all SKUs.
- **Yes** – Displays only the SKUs that have sufficient inventory within the specified warehouse based on the total units required for the Picklist.
- **No** – Displays only the SKUs that don’t have sufficient inventory within the specified warehouse based on the total units required for the Picklist.

<b>SKU Exists</b>	<ul style="list-style-type: none"> <li>• <b>All</b> – Displays all SKUs.</li> <li>• <b>Yes</b> – Displays only products that have a ProductID in Sellercloud.</li> <li>• <b>No</b> – Displays SKUs that do not have a corresponding product record.</li> </ul>
<b>Single Item Order</b>	<ul style="list-style-type: none"> <li>• <b>All</b> – Displays both single and multi-item orders.</li> <li>• <b>Yes</b> – Displays products that are in single item orders – one unit of one SKU.</li> <li>• <b>No</b> – Displays products that are in multi-item orders – more than one unit of the same SKU or multiple SKUs in one order. Please note that kit items are multi-item orders and can be affected by the <b>Is Kit</b> filter.</li> </ul>
<b>Rush Order</b>	<ul style="list-style-type: none"> <li>• <b>Rush Order</b> – Displays products from rush orders.</li> <li>• <b>Not Rush Order</b> – Displays products from orders that aren't rush.</li> </ul>
<b>Is Kit</b>	<ul style="list-style-type: none"> <li>• <b>All</b> – Displays both kit and non-kit items.</li> <li>• <b>Kit</b> – Displays only kit items. Please note that kit items are multi-item orders and can be affected by the <b>Single Item Order</b> filter.</li> <li>• <b>Not a Kit</b> – Displays only non-kit items.</li> </ul>
<b>Is Picked</b>	<ul style="list-style-type: none"> <li>• <b>All</b> – Displays both picked and unpicked products.</li> <li>• <b>Yes</b> – Displays only picked products.</li> <li>• <b>No</b> – Displays only unpicked products.</li> </ul>

**Note:** Instead of generating a picklist of all orders and then using the picklist filters, it may be more efficient to filter the orders first. For example, you may want to use the **Back Order** filter to filter out orders with items that are out of stock. To include orders like this in your picklist, go to **Client Settings** and check the box marked **Consider ReplacementSKU Qty in BackOrder Calculation**.

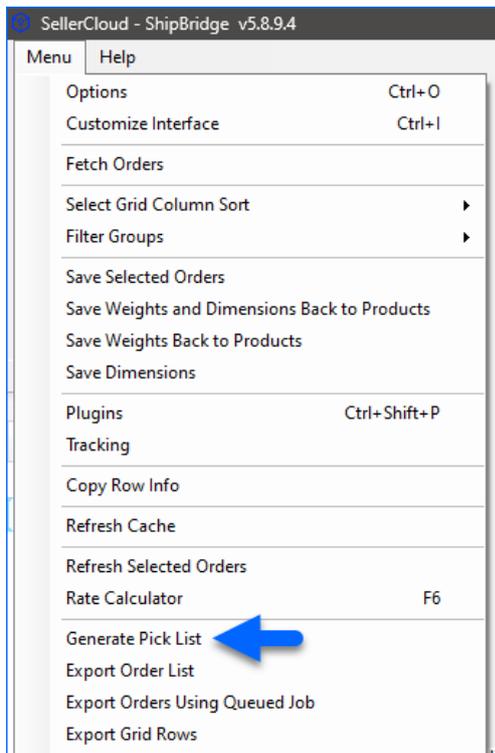
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## Use Picklists in Shipbridge

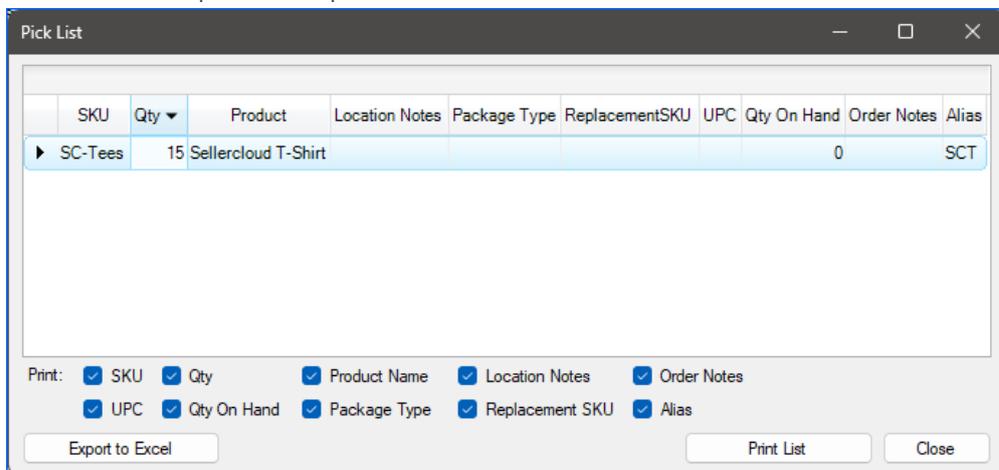
Shippers can now filter their Shipbridge based on their assigned split picklist. This allows different orders to be streamed to different stations, which keeps the system from overloading and prevents double shipping.

To generate a picklist in Shipbridge:

1. [Load Orders](#).
2. Check the boxes to the left of orders to select them.
3. Click **Menu** and select **Generate Pick List**.



4. Check or uncheck the boxes to select what you want to print.
5. Select **Export to Excel** to download the picklist as a .csv file.
6. Select **Print List** to print out the picklist.



To use Sellercloud picklists to prevent double shipping orders in Shipbridge:

1. Click **Menu > Options** and then select the **Shipping** tab.
2. Enable **Only allow shipping of orders loaded from picklists**.
3. Enter the **picklist ID** in the **Picklist #** filter. You may need to enable the filter under **Menu > Customize Interface > Filters**.
4. Select the items in the picklist and press **Load Selected**.
5. Press **OK** to load orders.

Shipbridge can be set to only ship confirmed orders. Confirm related orders. Enabling this setting will ensure that the shipper does not see any orders that are Unknown or Not Available.

# Overview

Picklists can increase efficiency by generating a summarized list of product quantities needed to fill selected orders. Picklists can be printed to a PDF document or exported to Excel and given to the shipping department for accurate picking, packing, and shipping. Picklists can be generated based on warehouse, meaning that the inventory and pick qty displayed will be based on inventory in a specified warehouse. This is controlled by client setting **Enable Pick List Generation by Warehouse**. You will not be able to generate a Picklist for a [Warehouse](#) of the following types: FBA, WFS, Newegg, and Interim.

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## Generate a Picklist

1. From the Manage Orders page select desired orders. Use the filters to generate picklists efficiently. See the example below.
  2. Select **Generate Picklist** from the Action Menu and press **GO**.
  3. Select a warehouse when picklist generation by warehouse is enabled. See above.
  4. The Picklist will enter a job queue. (This action can also be done from an order detail page.)
  5. Navigate to the picklist by clicking on the displayed job link or by clicking the **Manage Picklists** button to find and manage your picklists.
  6. View the picklist by clicking on the **Show Picklist** hyperlink.
  7. See below the explanation of picklists.
  8. Export to a PDF or Excel from the action menu. Export options include picklists with product images.
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## Picklists

Orders with [shadow products](#) will have the parent products in the picklist. Similarly, kit products will have their child components in the picklist. Picklists will generate with the following default columns:

- **SKU**
- **Product Name**
- **Qty** – Quantity of units to pick to fill selected orders.
- **Location** – Location of item in Warehouse (if set on the product home page)
- **Package** – Shipping package type (if set on the product's Shipping Preference page.)
- **Inventory** – The available quantity you have on hand to pick:  $\text{Aggregate} + \text{Unshipped} = \text{Inventory}$ . This is not necessarily the total physical qty.
- **UPC**

Additional columns can be enabled from the client settings:

- **Purchaser**
- **Replacements**
- **Replacement SKU**
- **Replacement SKU LOC**
- **Weight**

The following filters can be used to filter SKUs and quantities on the picklist.

- **Inventory**: As noted above –  $\text{Aggregate} + \text{Unshipped} = \text{Inventory}$ 
  - **All** – will display all items regardless if there is inventory to fill the orders.
  - **Available** – filters to display products and pick quantity that can fill orders completely. For example, if "Item A" has a quantity of 5 and the picklist has 1 order for 6 units of that product, "Item A" will not display when the "Available" filter has been selected. If there are 2 orders for 3 units ( $2 \times 3 = 6$ ) then "Item A" will display in the grid with a pick

quantity of 3 only, because there isn't enough quantity to fill the 2nd order. Older orders will take precedence over newer orders.

- **Not Available** – filters to display products and pick qty. without enough inventory to fill the orders. For example, if “Item A” has a quantity of 5 and the picklist has an 1 order for 6 units of that product, “Item A” will display when the “Not Available” filter has been selected. If there are 2 orders then “Item A” will display in the grid with a pick quantity of the unfillable quantity. Older orders will take precedence over newer orders.

- **SKU**

- **All** – Known and Unknown SKUs
- **Known** – filters to display only products that have a ProductID in SellerCloud.
- **Unknown** – filters to display SKUs that don't have a corresponding Product record. This can happen if orders are imported from somewhere for products that SellerCloud isn't aware of.

- **Items**

- **All** – displays both single and multi item orders.
- **Single Item** – filters products that are in single item orders – one unit of one SKU. [Read more here.](#)
- **Multi Item** – filters products that are in Multi Item orders – more than one unit of the same SKU or multiple skus in one order. [Read more here.](#) Please note that kit items are Multi Item orders and can be affected by the “Kit Items” filter

- **Kit Items**

- **All** – displays both kit and not kit items
- **Kit Items** – displays only kit items. Please note that kit items are Multi Item orders and can be affected by the “Items” filter
- **Not Kit Items** – displays only non-kit items.

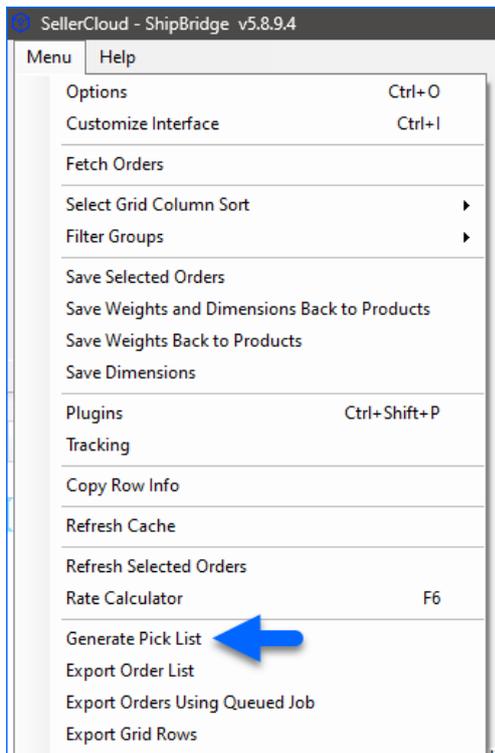
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## Generate Filtered Picklists

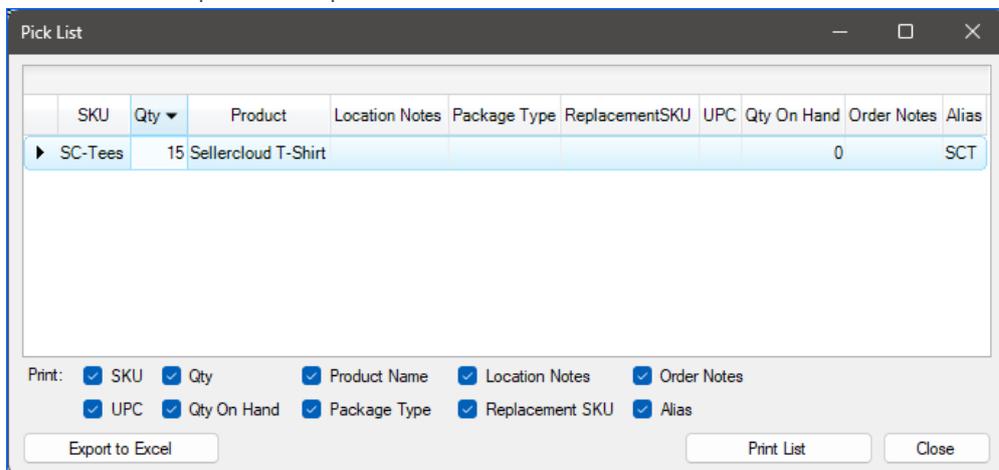
Instead of generating picklist of all orders and then using the picklist filters, it may be more efficient to filter the orders before generating a picklist. For example, use the “Back Order” filter to filter out orders with items not in stock. (Enable client setting **Consider ReplacementSKU Qty in BackOrder Calculation** to include such orders in the picklist.) There is an action to **Confirm related orders** since [ShipBridge](#) can be set to only allow confirmed orders to ship. Using the confirmed status, together with these filters, it is possible to make sure that the shipper doesn't see any orders that are Unknown or Not Available.

To generate a picklist in Shipbridge:

1. [Load Orders.](#)
2. Check the boxes to the left of orders to select them.
3. Click **Menu** and select **Generate Pick List.**



4. Check or uncheck the boxes to select what you want to print.
5. Select **Export to Excel** to download the picklist as a .csv file.
6. Select **Print List** to print out the picklist.



**Picklists can be used to prevent double-shipping orders in ShipBridge.**

1. In ShipBridge, navigate Menu > Options > Shipping Tab. **Enable setting Only allow shipping of orders loaded from picklists.**
2. Generate a picklist for orders in SellerCloud.
3. In ShipBridge, Enter the picklist ID in the picklist filter. You may need to enable the filter under Menu > Customize Interface > Filters tab.
4. Select the items in the picklist and press **Load Selected.**
5. Press OK to load orders.

