

loremIpsum Systems - LoremIpsum Start Guide

Document Version 1.4

Lorem Ipsum Company

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Overview - The Start Guide

The Purpose of This Guide

The purpose of this guide is to:

- Allow the Warehouse Manager to be able to set up a basic, functioning Manual Picking workflow with loremIpsum's systems

Requirements

- Google Chrome (version v58 or higher)
- Access to the loremIpsum Customer Portal, which should provide
 - loremIpsum Logic URL and User Login Credentials
 - loremIpsum Command URL and User Login Credentials
 - loremIpsum PickMate URL and User Login Credentials
 - loremIpsum Cart Builder URL and User Login Credentials

loremIpsum PickMate Start Guide

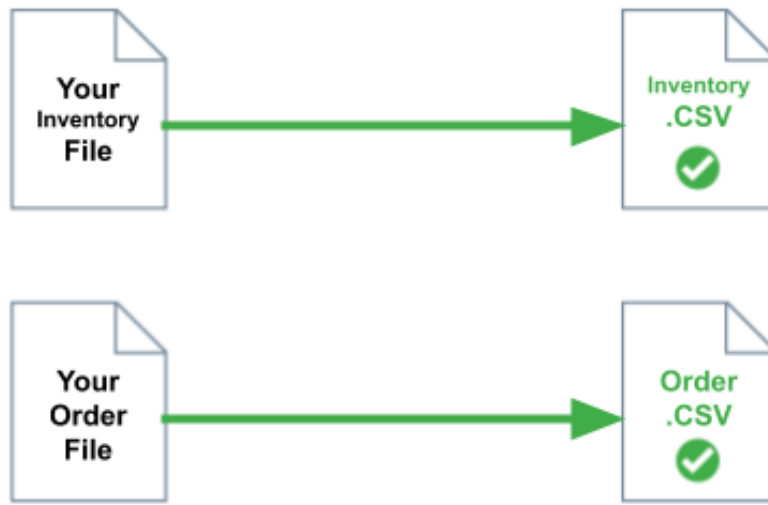
The Purpose of This Guide

In this guide you will:

1. Prepare one of your Inventory files and one of your Order files to upload into loremIpsum's System
2. Upload those two files through loremIpsum Connect
3. Enter your one of you Carts into loremIpsum's System
4. Give one of your Pickers an account, and finally, with your Picker
5. Fulfill a Pick of the Order you Uploaded

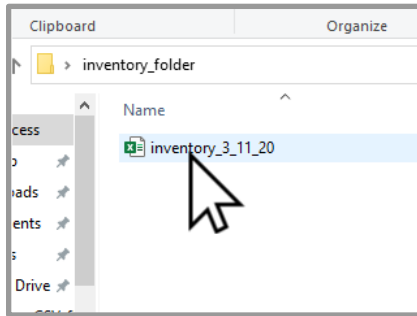
Section 1 - Preparing your Inventory and Order Files

In this section, you will take one of your Inventory files and one of your Order files. You will format them correctly, and then turn them into a .CSV.



All right, let's get started!

1. Find your Inventory File with at least some of your Inventory



You ultimately want to make a .CSV, but for now, it is ok to find an Excel file (or equivalent) that holds some of your Inventory.

2. Make sure your file has columns with the following data

Your Inventory file must have the following data:

- Container ID
- Container Size
- Product ID
- Quantity in Container
- Slot ID




Note that you can name your file headers whatever you want, as long as it has the above data. The file below has varied names, but would be acceptable.


	A	B	C	D	E	F	G
1	contain_id	contain_dimensions	prod_id	quantity	slot	prod_description	image
2	Y000103	(203, 212, 600)	797696	12	400-056-A-01	kitchen_item	https://lorem
3	G000108	(203, 212, 600)	601963	12	400-056-A-02	doll	https://ipsum
4	P000136	(101, 212, 600)	607199	12	400-056-E-02	tire	https://sit
5	P000004	(254, 212, 600)	786103	12	400-055-B-03	air freshener	https://dolor
6	P000003	(304, 212, 600)	58776	12	400-055-C-04	box crayons	https://amet
7							

3. Format the column header names

loremIpsum’s system does not like blank spaces, or math symbols (-,+,*,/).

Underscores (_) are great though, so make sure each header is either one word, or words connected by an underscore.

Incorrect Header Styles 	
Style	Example
Empty Space	container desc
Dash (-)	slot-id
Plus (+)	img+url
Multiplication (*)	container*
Division (/)	container/kind
Anything else besides an underscore (_)	img%desc, slot(id), container&id

Correct Header Styles 	
Style	Example
One Word	quantity
Underscore	item_id
Uppercase	prodID

So in short, take your Inventory file, and then update the headers to remove anything except for letters and underscores.

	A	B	C	D
1	contain id	contain-dimensions	prod*id	/quantity
2	V000103	(203, 212, 600)	797696	12
3	G000108	(203, 212, 600)	601963	12



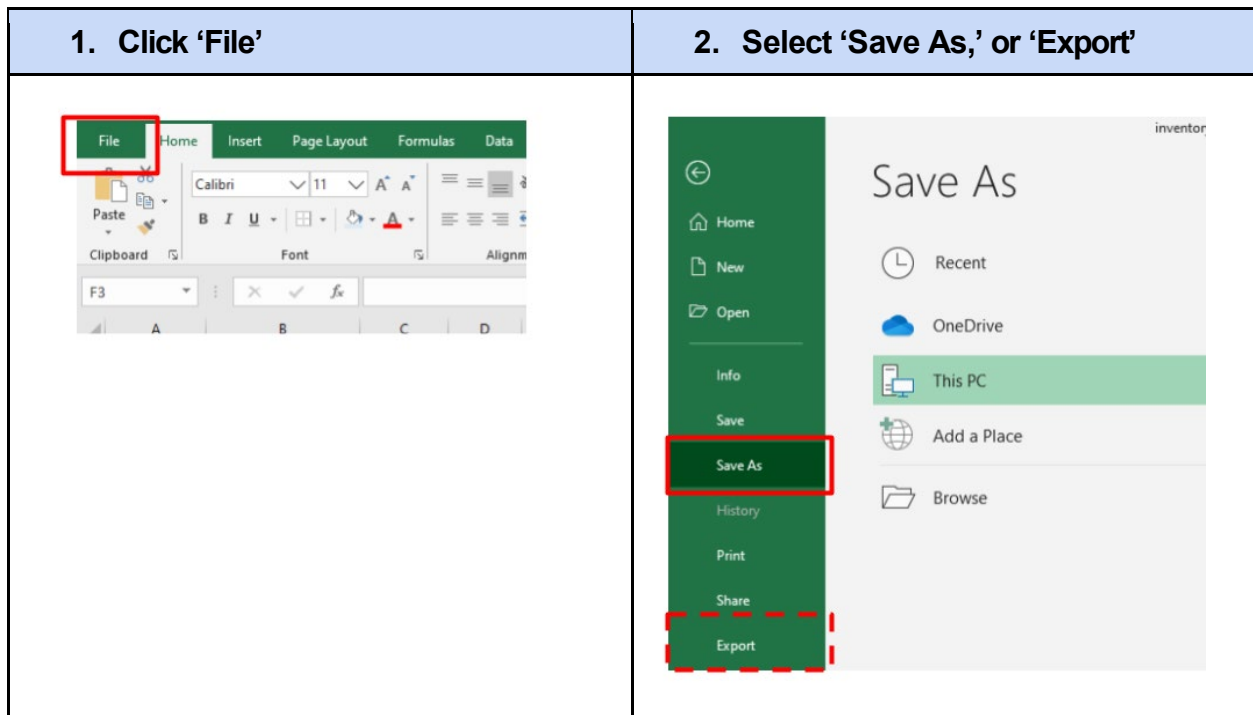
	A	B	C	D
1	contain_id	contain_dimensions	prod_id	quantity
2	V000103	(203, 212, 600)	797696	12
3	G000108	(203, 212, 600)	601963	12



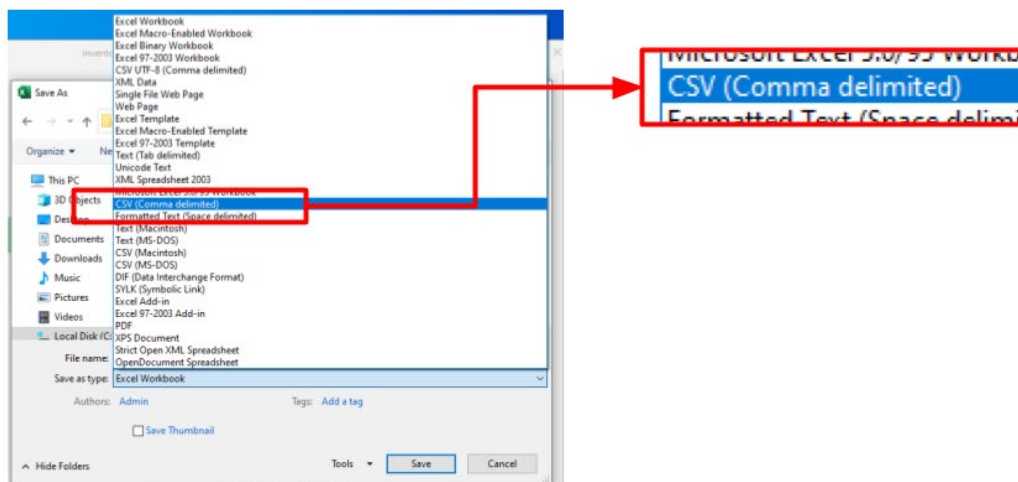
4. Export Inventory File to a .CSV

Microsoft Excel, and equivalent spreadsheet programs have an 'Export to .CSV' option.

The below example employs Excel, but other programs should have a similar path.



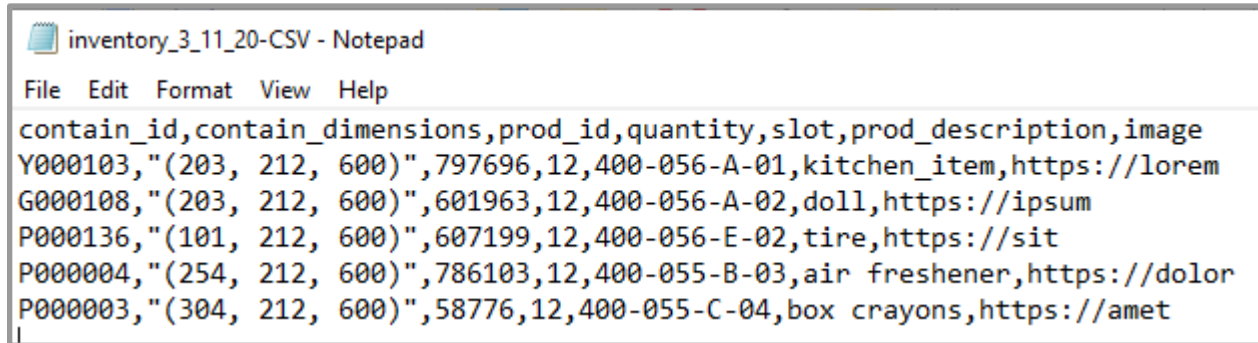
After this, the program gives you an option how to save your file. Select 'CSV.'



5. And that's it! You have your Inventory .CSV

.CSVs are text file versions of data tables, and this is what you should have.

If you open it up in a Notepad type program, the file should look something like this:



```
inventory_3_11_20-CSV - Notepad
File Edit Format View Help
contain_id,contain_dimensions,prod_id,quantity,slot,prod_description,image
Y000103,"(203, 212, 600)",797696,12,400-056-A-01,kitchen_item,https://lorem
G000108,"(203, 212, 600)",601963,12,400-056-A-02,doll,https://ipsum
P000136,"(101, 212, 600)",607199,12,400-056-E-02,tire,https://sit
P000004,"(254, 212, 600)",786103,12,400-055-B-03,air freshener,https://dolor
P000003,"(304, 212, 600)",58776,12,400-055-C-04,box crayons,https://amet
```

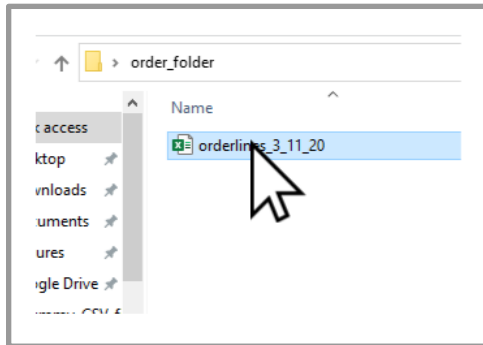
Put the file away for now.

We will follow a similar path to prepare your Order .CSV.

Now let's get your Order .CSV

Note that this will be similar to making your Inventory .CSV

1. Find your Order File with 'just a few' Orders



loremIpsum can handle long Orderlines, but for the first one, we suggest a short Order. Consider bringing in an Order that can fill up a Cart, or less if possible.

And like with inventory, you ultimately want to make a .CSV, but for now, it is ok to find an Excel file (or equivalent) that holds these Orders.

2. Make sure your file has columns with the following data

Your Order file must have the following data:

- Order Line ID
- Group ID (**also known as Order ID**)
- Order Line Quantity
- Product ID
- Container Type



Note that you can name your file headers whatever you want, as long as it has the above data. The file below has varied names, but would be acceptable.

	A	B	C	D	E	F
1	product_id	order_id	order_line_id	container_kind	quantity	order_line_priority
2	601963	167001105019	1578	MEDIUM	6	1
3	58776	167001105020	1579	MEDIUM	6	1
4	605376	167001105021	1580	MEDIUM	6	1
5	607199	167001105022	1581	MEDIUM	6	1
6	786103	167001105023	1582	MEDIUM	6	1

The above inventory file would be acceptable, even though the

3. Format the column header names

loremIpsum’s system does not like blank spaces, or math symbols (-,+,*,/).

Underscores (_) are great though, so make sure each header is either one word, or words connected by an underscore.

Incorrect Header Styles ❌	
Style	Example
Empty Space	container desc
Dash (-)	slot-id
Plus (+)	img+url
Multiplication (*)	container*
Division (/)	container/kind
Anything else besides an underscore (_)	img%desc, slot(id), container&id

Correct Header Styles ✅	
Style	Example
One Word	quantity
Underscore	item_id
Uppercase	prodID

So like with Inventory, take your Order file, and then update the headers to remove anything except for letters and underscores.

	A	B	C	D	E
1	product id	order id	order/line/id	container+kind	qua
2	601903	167001105019	1579	MEDIUM	
3	58776	167001105020	1579	MEDIUM	
4	605376	167001105021	1580	MEDIUM	
5	607199	167001105022	1581	MEDIUM	
6	786103	167001105023	1582	MEDIUM	

❌

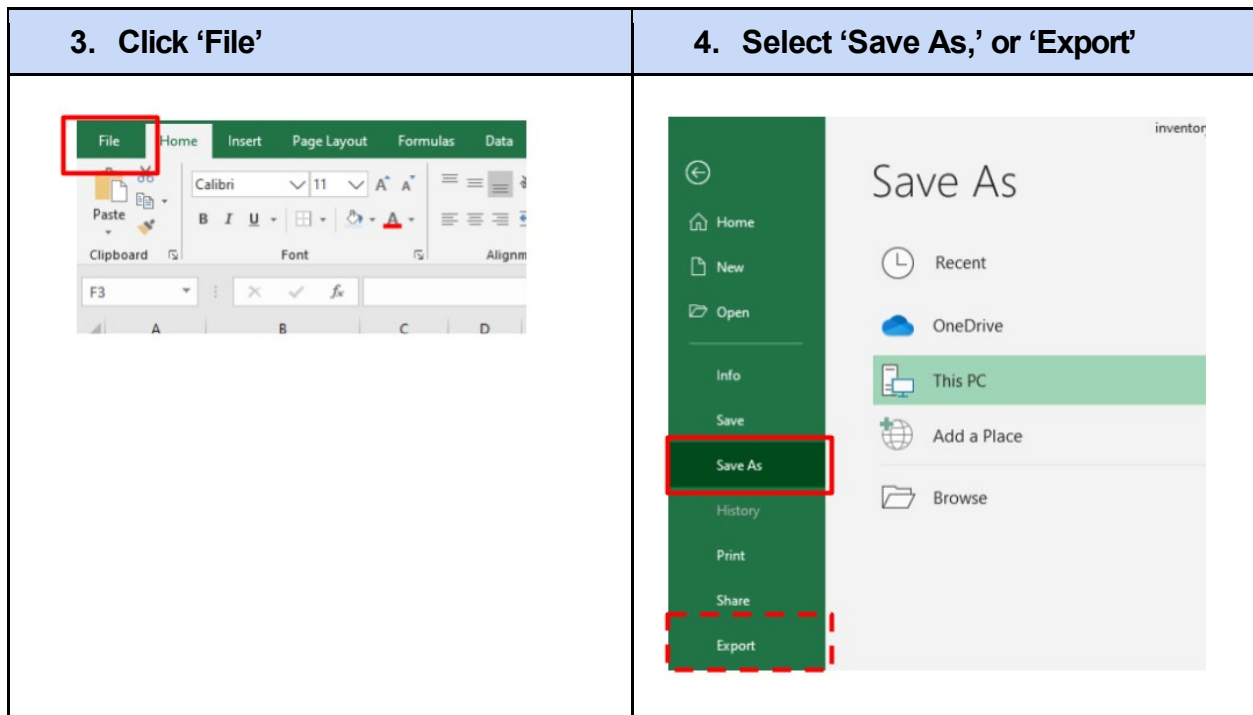
	A	B	C	D	E
1	product_id	order_id	order_line_id	container_kind	qua
2	601903	167001105019	1579	MEDIUM	
3	58776	167001105020	1579	MEDIUM	
4	605376	167001105021	1580	MEDIUM	
5	607199	167001105022	1581	MEDIUM	
6	786103	167001105023	1582	MEDIUM	

✅

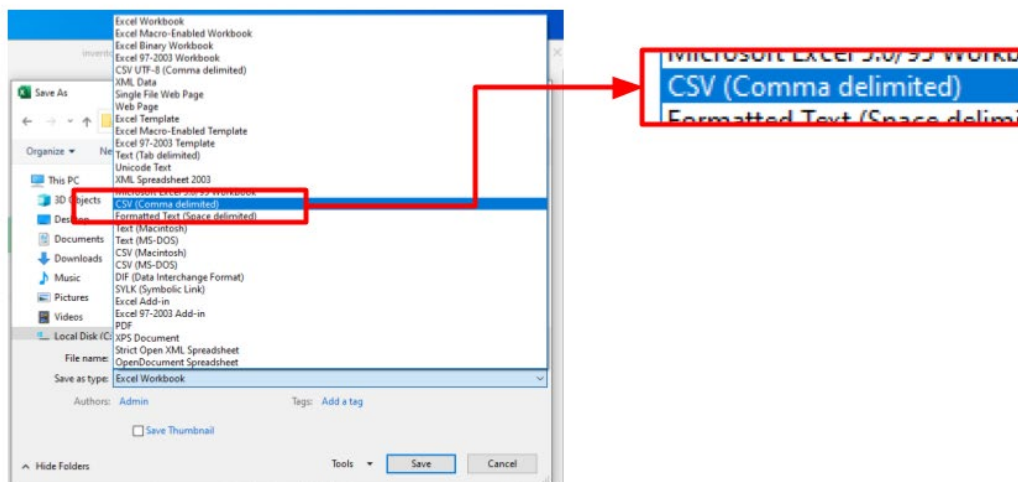
4. Export Order File to a .CSV

Microsoft Excel, and equivalent spreadsheet programs have an 'Export to .CSV' option.

The below example employs Excel, but other programs should have a similar path.



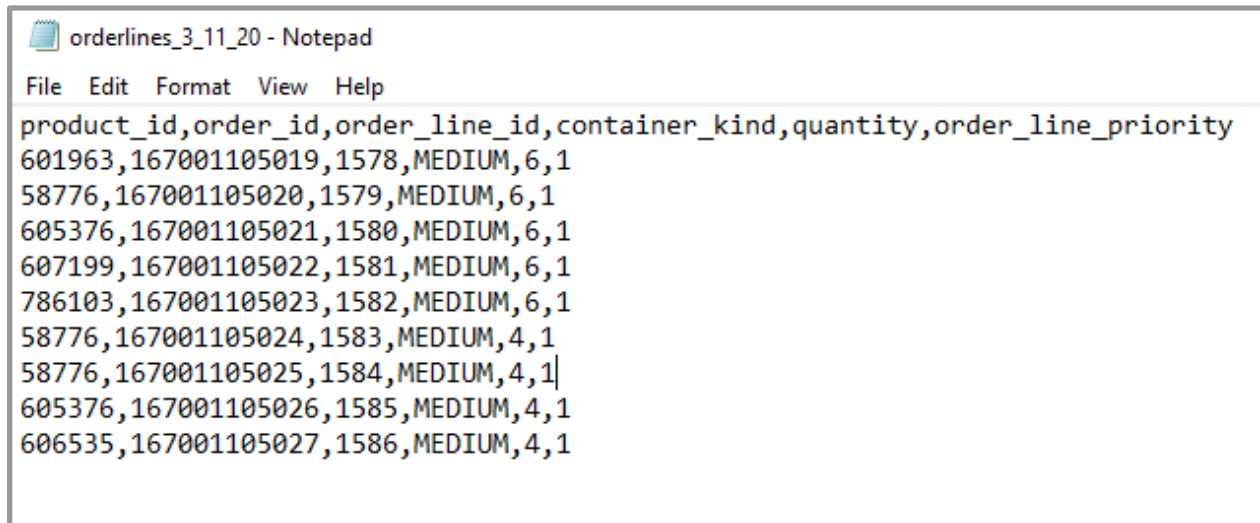
After this, the program gives you an option how to save your file. Select 'CSV.'



5. And that's it! You have your Order.CSV

.CSVs are text file versions of data tables, and this is what you should have.

If you open it up in a Notepad type program, the file should look something like this:

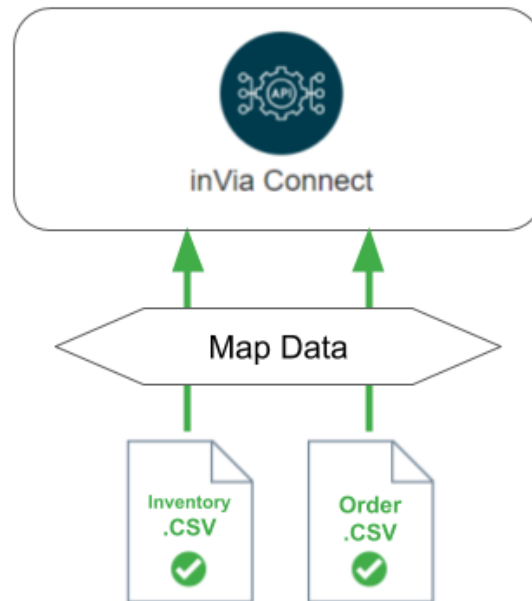


```
orderlines_3_11_20 - Notepad
File Edit Format View Help
product_id,order_id,order_line_id,container_kind,quantity,order_line_priority
601963,167001105019,1578,MEDIUM,6,1
58776,167001105020,1579,MEDIUM,6,1
605376,167001105021,1580,MEDIUM,6,1
607199,167001105022,1581,MEDIUM,6,1
786103,167001105023,1582,MEDIUM,6,1
58776,167001105024,1583,MEDIUM,4,1
58776,167001105025,1584,MEDIUM,4,1
605376,167001105026,1585,MEDIUM,4,1
606535,167001105027,1586,MEDIUM,4,1
```

Now we will upload the Inventory and Order .CSVs into loremIpsum's system through loremIpsum Connect.

Section 2 - Uploading your Inventory and Order Files through loremIpsum Connect

In this section, you will upload your files into loremIpsum's system through loremIpsum Connect.



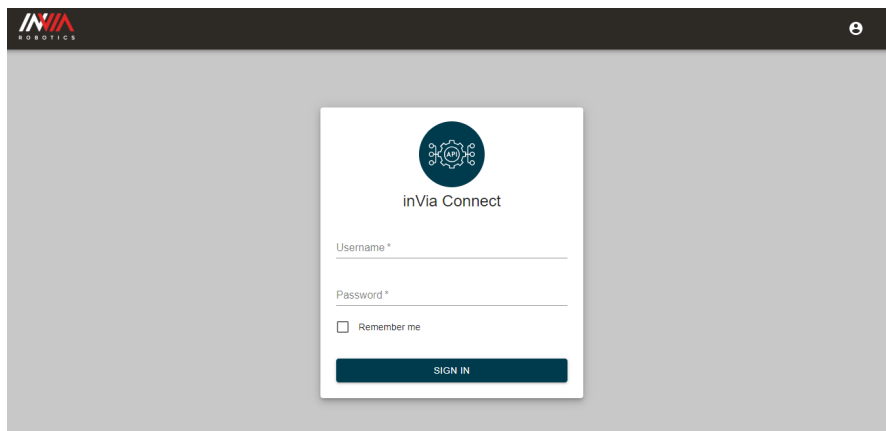
Upload Inventory .CSV File First



You must Upload the Inventory .CSV File first

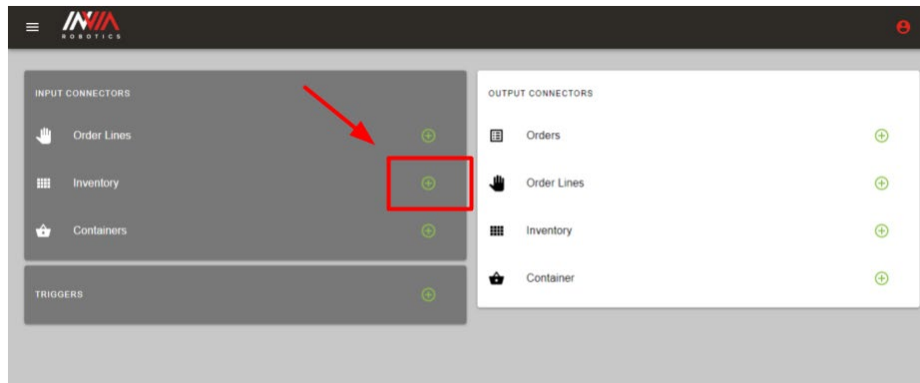
lorem Ipsum's System must first understand the warehouse Inventory before it can take Orders, so upload the Inventory .CSV first. Uploading another document first may cause issues.

1. Login through lorem Ipsum Connect

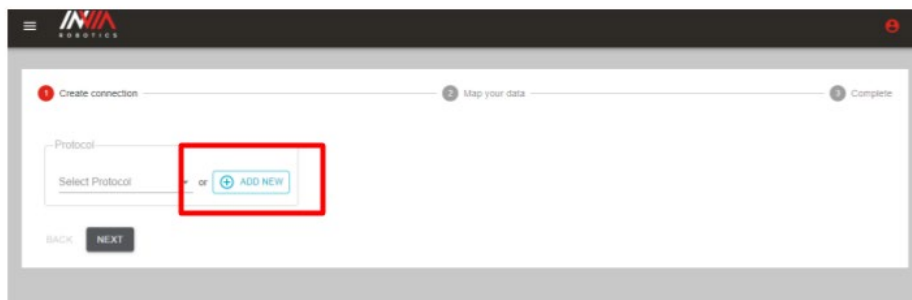


Login through lorem Ipsum Connect. If you do not have Login Credentials, you can find them through the Customer Portal, or by contacting your Sales Representative.

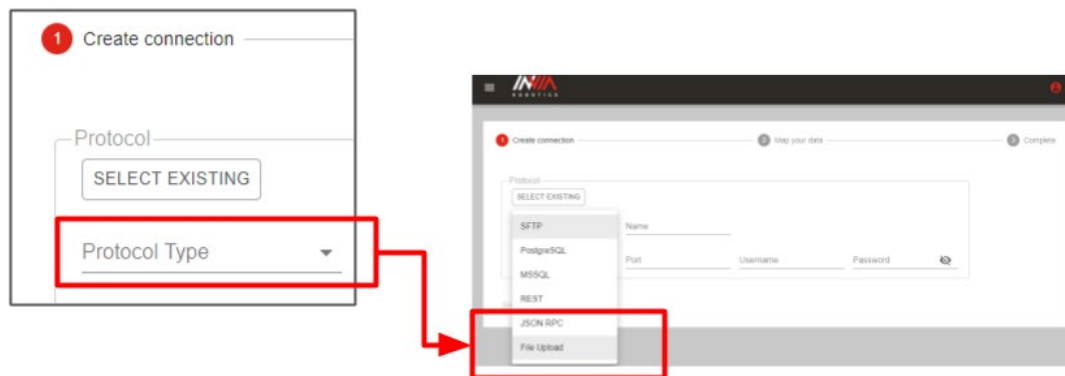
2. Click the plus button on the Input Connectors side, by Inventory



3. Click 'Add New' to make a new Input Connection.



4. Create connection



Create a connection by clicking the Protocol Type dropdown, and then choose 'File Upload.'

5. Give file and connector name (whatever name you want), Select Inventory and choose .CSV



Give the file and connector whatever name you want (the names above are just samples).

After you do this, select 'Intent' and then select 'Set Inventory.' Under File Type, select '.CSV.'



Now we will *map the Inventory data* - what does *mapping the data* mean?

Mapping the data basically means connecting your system to loremIpsum's system.

Your Inventory files have their own headers, and loremIpsum's system has its own headers.

In the next page you will tell loremIpsum's system which one of your headers corresponds to which one of loremIpsum's column headers, and what type of data each column is (String, Integer, Date etc.)

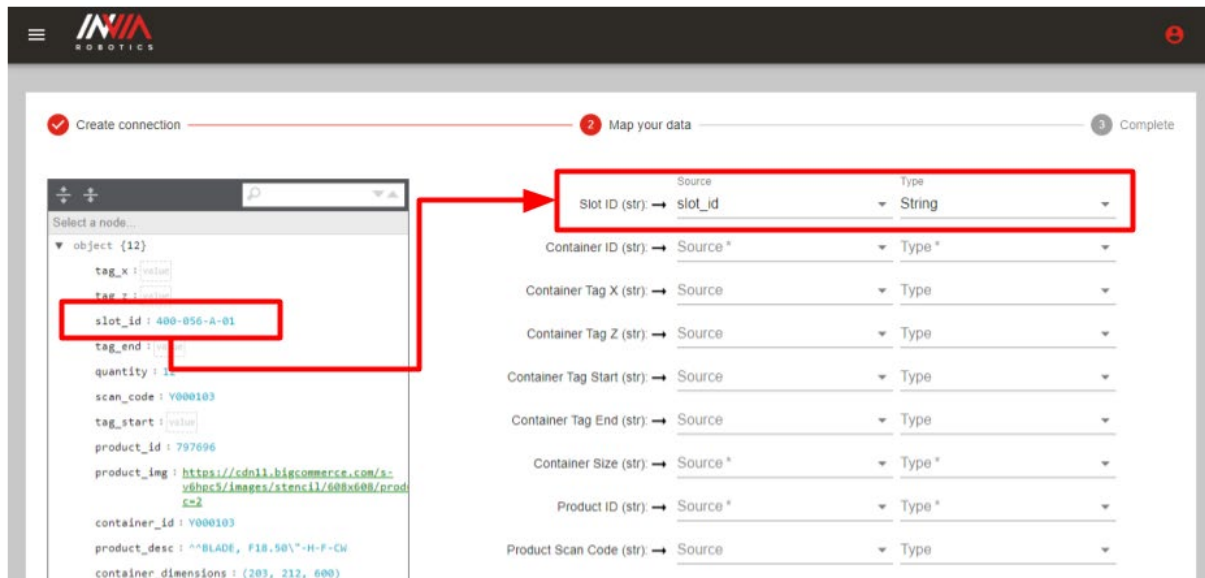
Source	Type
slot_id	String
Source *	Type *
Source	Type
Source	Type
Source	Type
Source	Type
Source *	Type *
Source *	Type *
Source	Type

These are the customer-supplied field names, with a sample value.

These are inVia's headers, which will connect to the customer's headers.

This is where the Warehouse Manager tells which of their headers are connected to which of inVia's headers, and what type they are.

6. Map your Inventory data



Map your Inventory data to loremIpsum's System by selecting the correct header from the 'Source' dropdown.

loremIpsum reads most data as String (str) types.

loremIpsum reads some data as integers (int) or other ways, and in any case loremIpsum will suggest the type in parentheses by the name.

Data sources with asterisks by them are mandatory, the others are optional.

Extra Data:

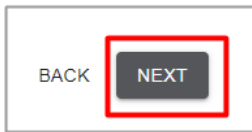
Model	▼Key	Source	▼	⊖
		Type	▼	

⊕ ADD EXTRA DATA

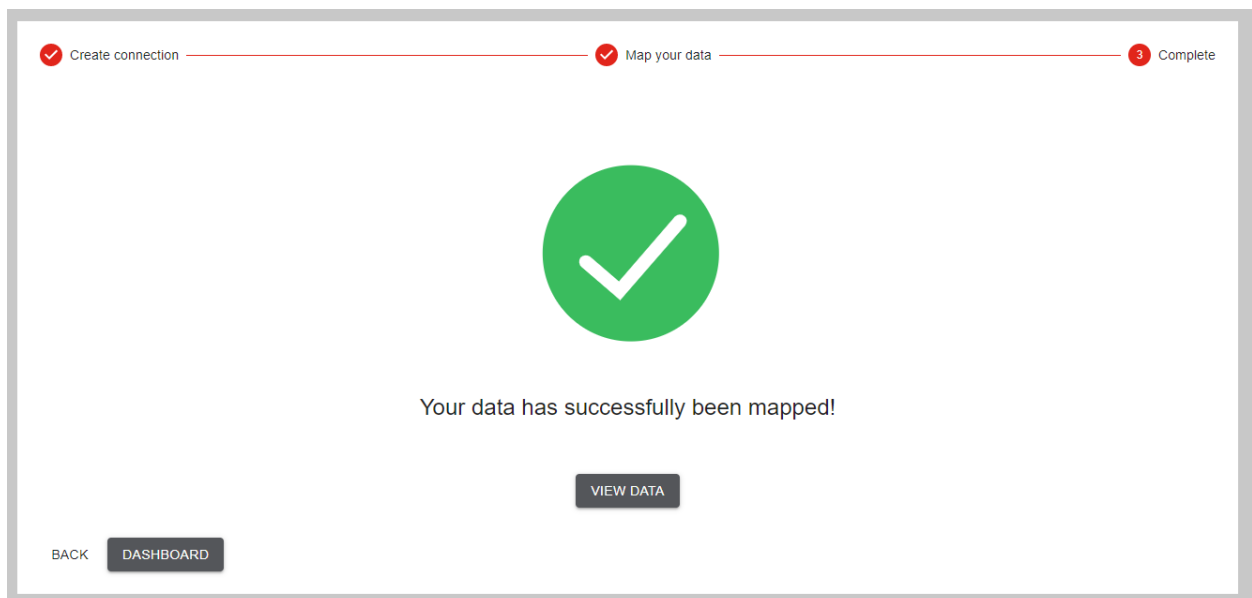
You can add extra data fields if you wish.

7. After all fields are filled out, click the Next button

Click the *Next* button at the bottom of the page.

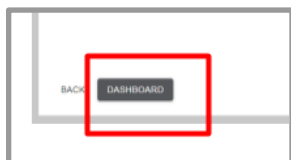


8. Your inventory Data has been mapped!



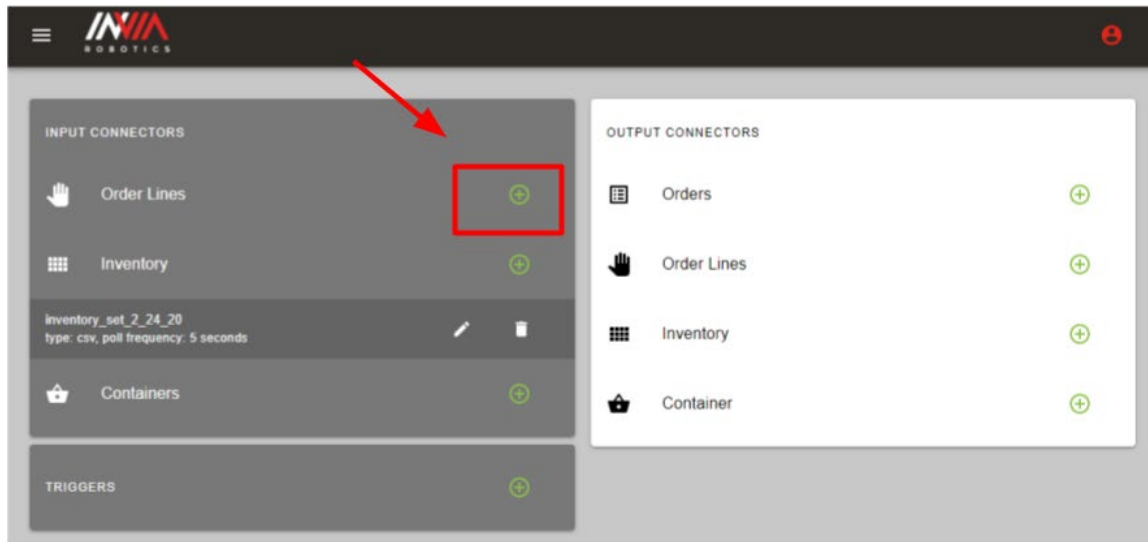
Your Inventory data has been successfully mapped!

Now click the next button to get back to your dashboard, so you can upload your Order .CSV.

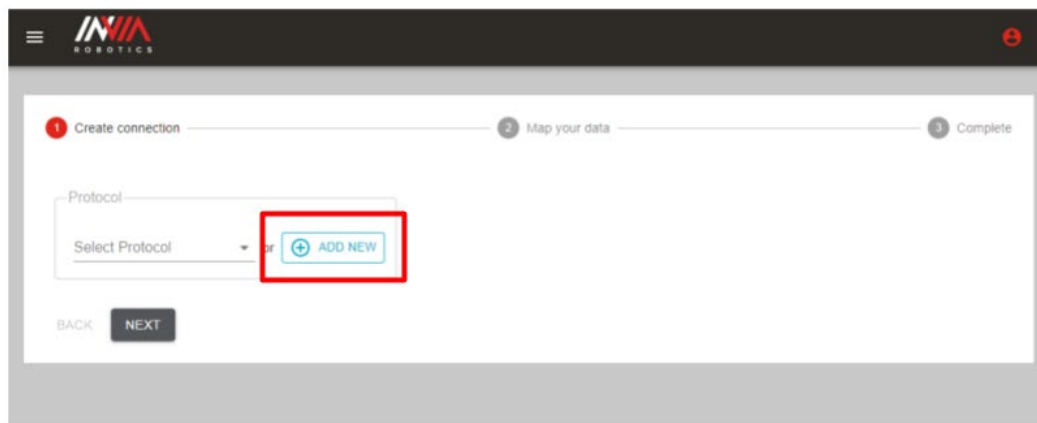


Upload Your Order .CSV File

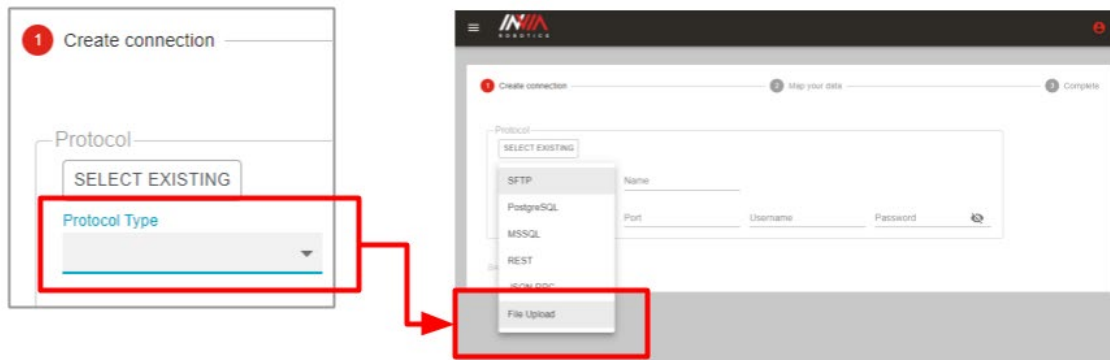
1. Return to loremIpsum Connect's home page, and Click the Plus button on the Input Connectors side, by Order Lines



2. Click 'Add New' to make a new Input Connection.

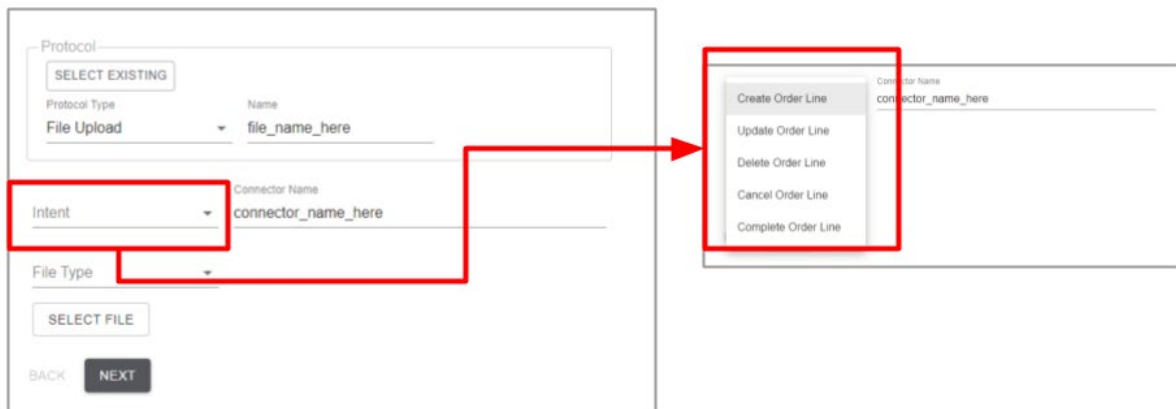


3. Create connection



Create a connection by clicking the Protocol Type dropdown, and then choose 'File Upload.'

4. Give file and connector name (whatever name you want), Select Order and choose .CSV



Give the file and connector whatever name you want (the names above are just samples).

After you do this, select 'Intent' and then select 'Create Order Line.' Under File Type, select '.CSV.'

**Now we will *map the Order data* - what does *mapping the data* mean?**

Mapping the data basically means connecting your system to loremIpsum's system.

Your Order files have their own headers, and loremIpsum's system has its own headers.

In the next page you will tell loremIpsum's system which one of your headers corresponds to which one of loremIpsum's column headers, and what type of data each column is (String, Integer, Date etc.)

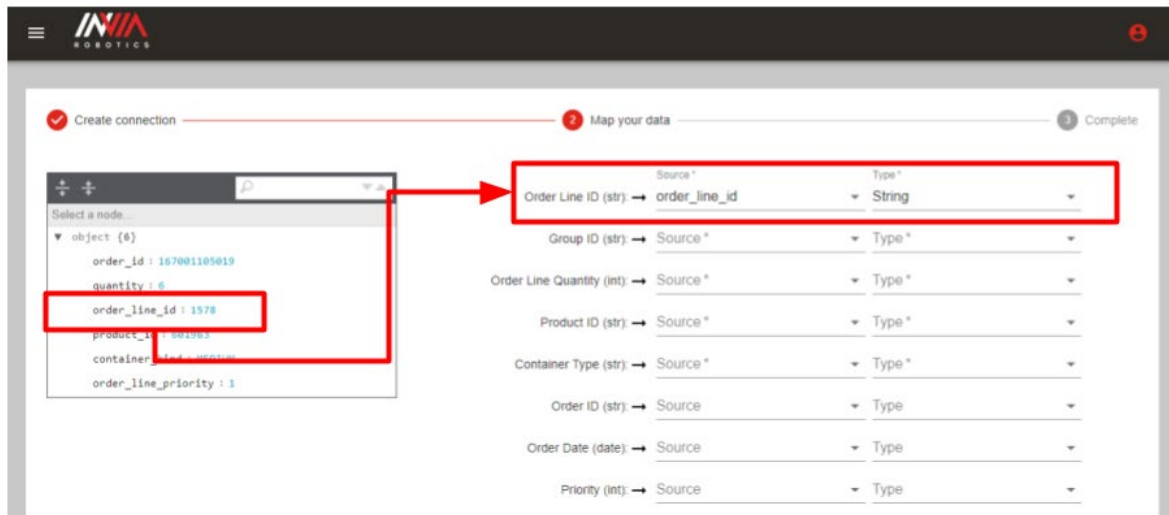
Source	Type
Order Line ID (str)	order_line_id
Group ID (str)	Source *
Order Line Quantity (int)	Source *
Product ID (str)	Source *
Container Type (str)	Source *
Order ID (str)	Source
Order Date (date)	Source
Priority (int)	Source

These are the customer-supplied field names, with a sample value.

These are inVia's headers, which will connect to the customer's headers.

This is where the Warehouse Manager tells which of their headers are connected to which of inVia's headers, and what type they are.

5. Map your Order data



Map your Inventory data to loremIpsum's System by selecting the correct header from the 'Source' dropdown.

Note - on this page, in the field Group ID, put your Order ID.

loremIpsum reads most data as String (str) types.

loremIpsum reads some data as integers (int) or other ways, and in any case loremIpsum will suggest the type in parentheses by the name.

Data sources with asterisks by them are mandatory, the others are optional.

Extra Data:

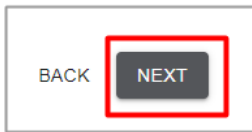
Model	Key	Source	Type

+ ADD EXTRA DATA

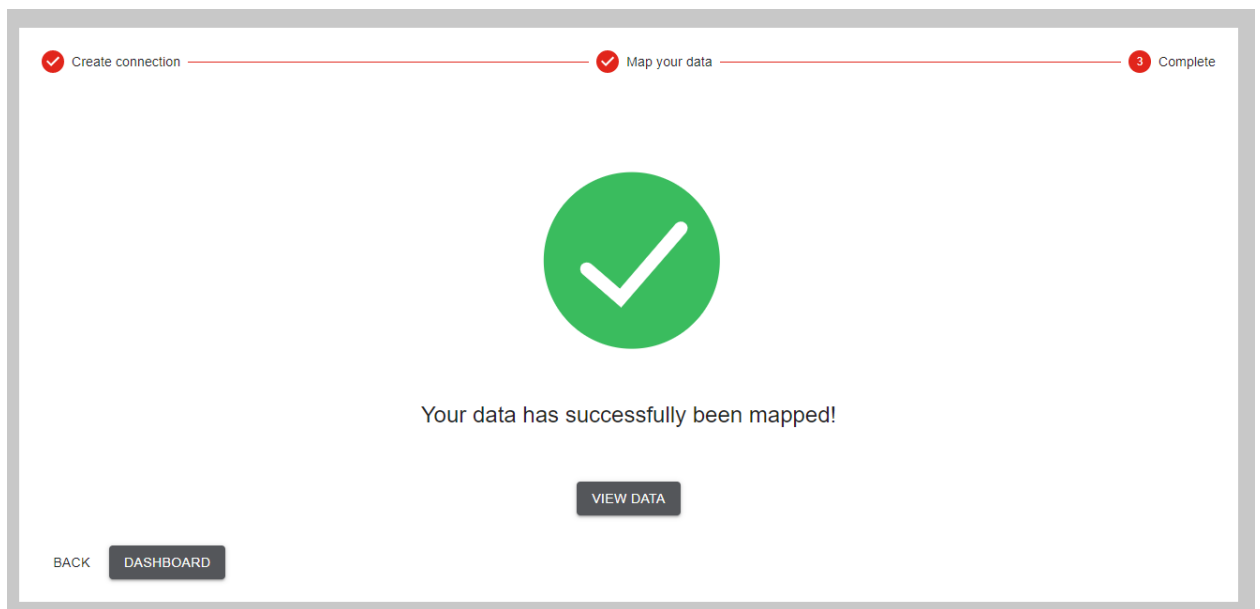
You can add extra data fields if you wish.

6. After all fields are filled out, click the Next button

Click the *Next* button at the bottom of the page.



7. Your Order data has been mapped!



Now it's time to put one of your Carts into loremIpsum's System..

Section 3 - Building a Cart

In this section, you will Build a Cart, which means putting one of your Carts into loremIpsum's System.

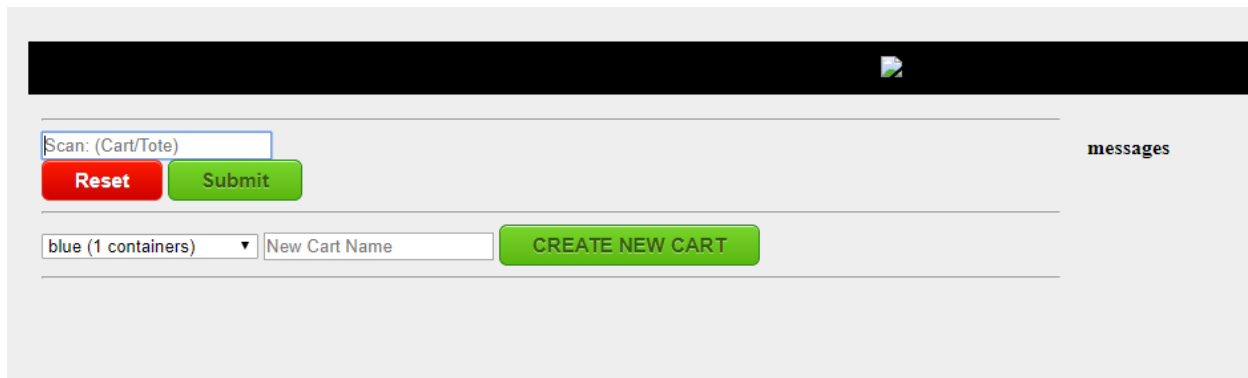


Building a Cart

Building a Cart means *mapping a warehouse Cart into loremIpsum's System*.

The warehouse manager puts information about a Cart into loremIpsum's System by:

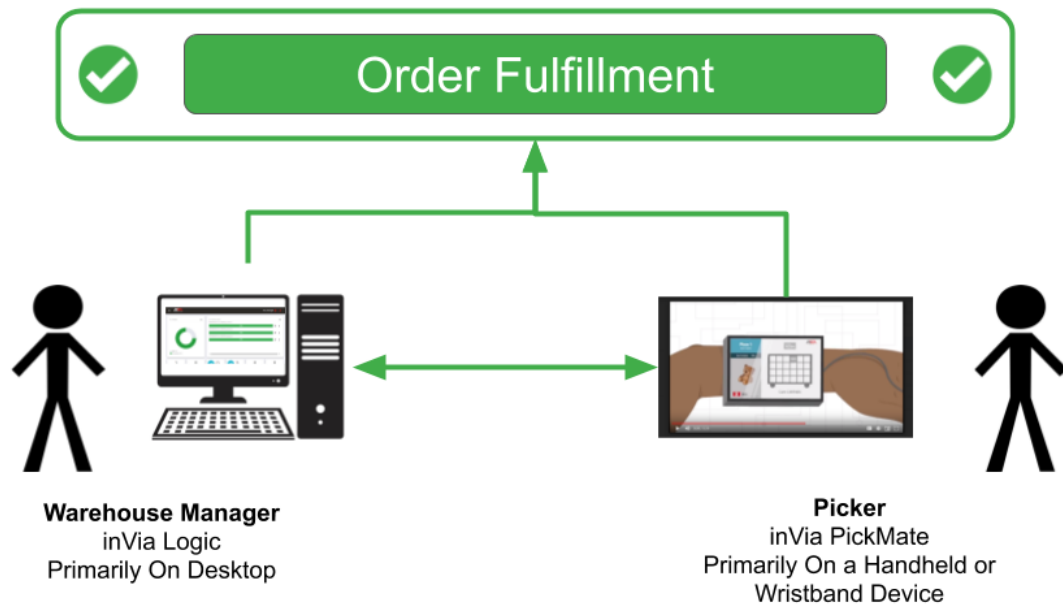
1. Providing the Cart's barcode
2. Giving the Cart a name and
3. Stating what kind of Cart it is (how many Containers it holds, and what size of Container)



The screenshot shows a web interface for building a cart. At the top is a black header bar with a small green icon on the right. Below the header is a light gray form area. The first section contains a text input field with the placeholder text "Scan: (Cart/Tote)", a red "Reset" button, and a green "Submit" button. To the right of this section is a "messages" label. The second section contains a dropdown menu with "blue (1 containers)" selected, a text input field with "New Cart Name", and a green "CREATE NEW CART" button.

Section 4 - Picking the Order

In this section, the Warehouse Manager (you) will give a Picker an account, and then together you will fulfill a manual Pick of the Order you just uploaded.



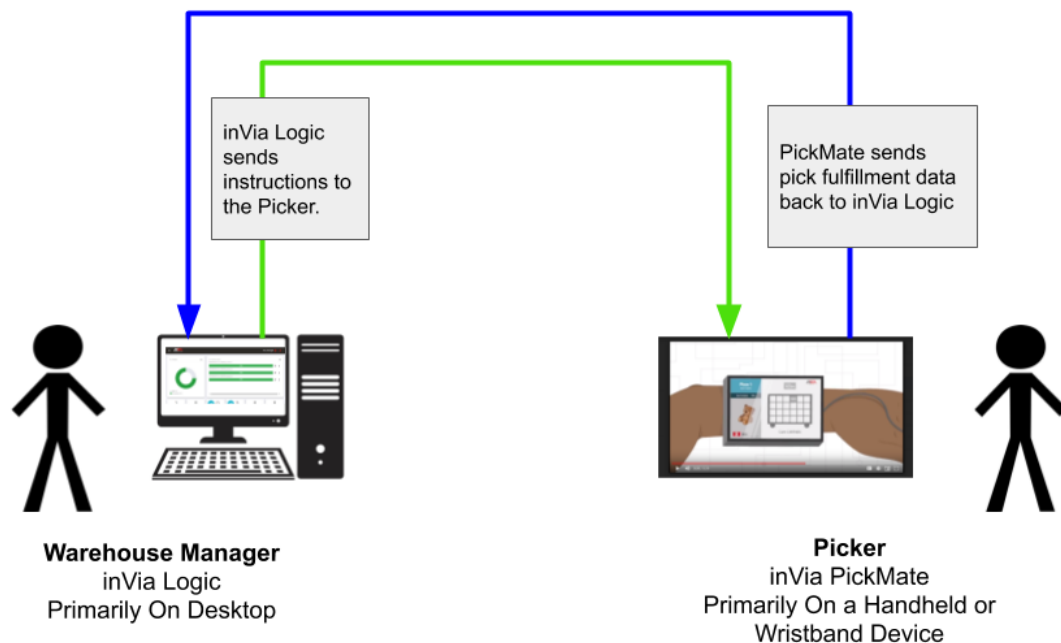
Bring in a Picker with PickMate

1. Choose a Picker from your Warehouse

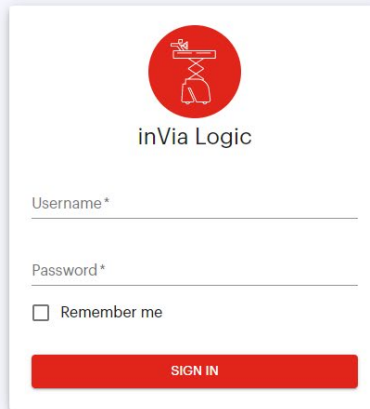
You can act as Picker yourself, but we recommend bringing in a Picker into this process.


You will interact with loremIpsum Logic, and the Picker will interact with a module named PickMate.

loremIpsum Logic will send Pick instructions, and they will be displayed to your Picker through PickMate.



2. Log in to loremIpsum Logic so that you can make a Picking account for your Picker

A login form for 'inVia Logic' is centered on a light blue background. The form is white with a red circular logo at the top containing a white icon of a DNA helix with a test tube. Below the logo, the text 'inVia Logic' is displayed. The form contains two input fields: 'Username*' and 'Password*', both with red asterisks indicating required fields. Below the password field is a checkbox labeled 'Remember me'. At the bottom of the form is a red button with the text 'SIGN IN' in white capital letters.


inVia Logic

Username*

Password*

☐ Remember me

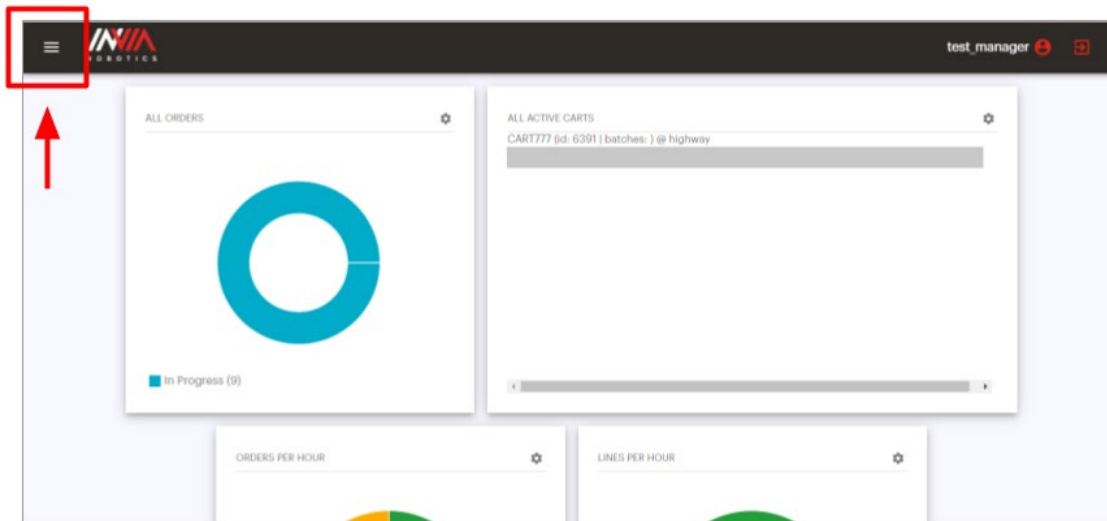
SIGN IN

Login through loremIpsum Logic. If you do not have Login Credentials, you can find them through the Customer Portal, or by contacting your Sales Representative.

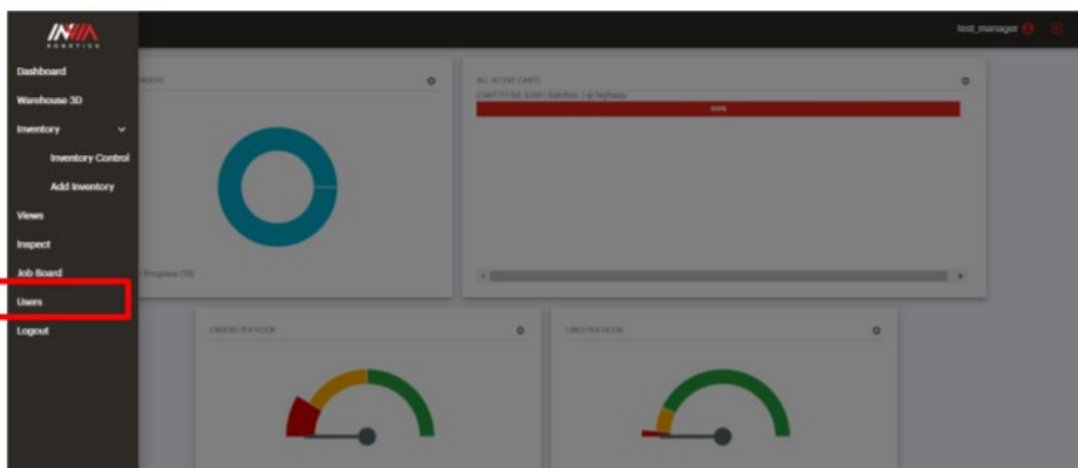
Now that you are logged in, you can make an account for your Picker.

3. Click on the Hamburger Icon to open the Menu, and then Select Users

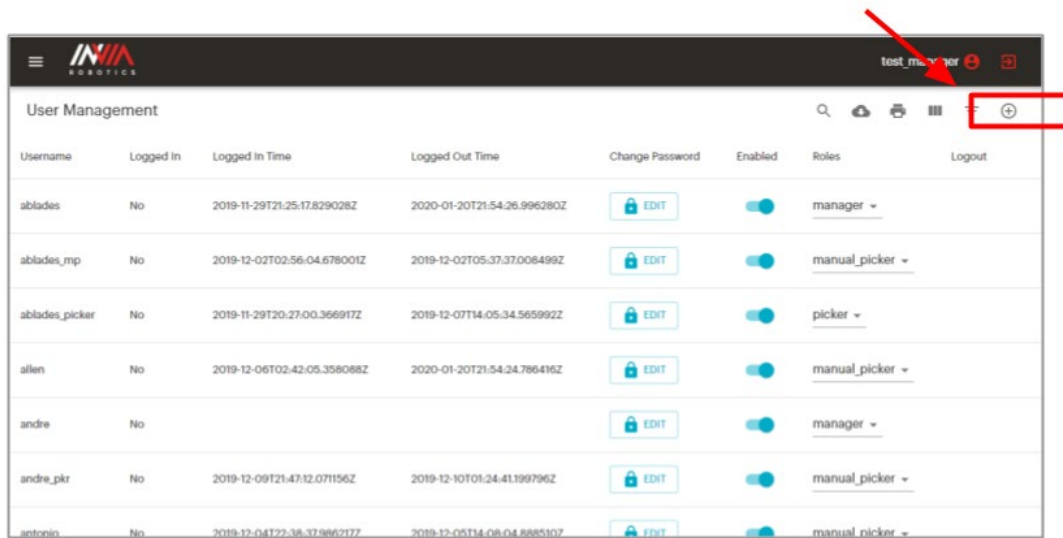
First click on the Hamburger Icon in the upper left corner to open the Menu.



In the Menu drawer, click 'Users.'



4. Click the 'Add User' button in the upper right of the screen

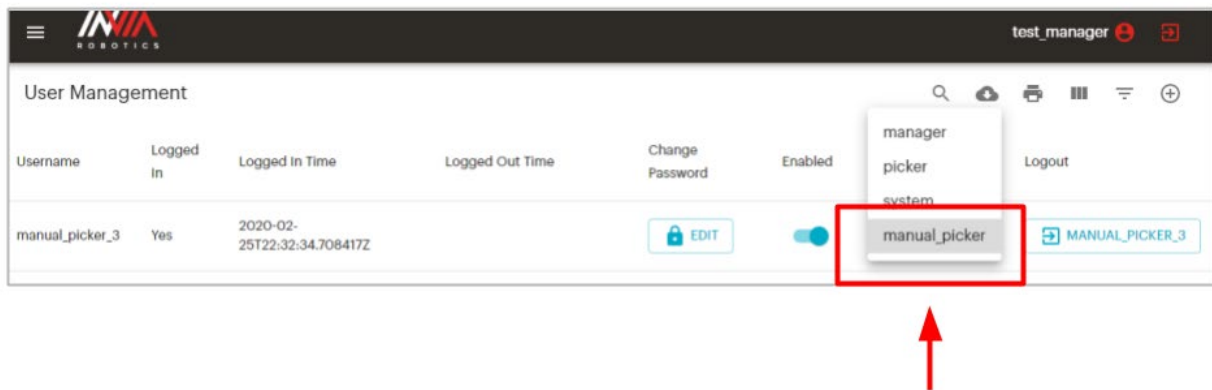


4. Give your Picker a Username and Password

Note that the username in the screenshot below is just a sample name - you and your Picker can choose whatever name and password you wish.

The screenshot shows a modal dialog titled 'Add a New User'. The text inside says: 'To add a new user, please enter a unique username with a password below.' There are three input fields: 'Username*' with the value 'manual_picker_3', 'Password*' with masked characters '*****', and 'Confirm Password*' with masked characters '*****'. At the bottom right, there are two buttons: 'CANCEL' and 'ADD USER'.

5. Find your Picker in the User list, and assign Picker the role of manual_picker



Your Picker now has a role, but is not checked in. Let's check the Picker in.

Before the Picker is checked in, let's make sure the Picker has the right setup

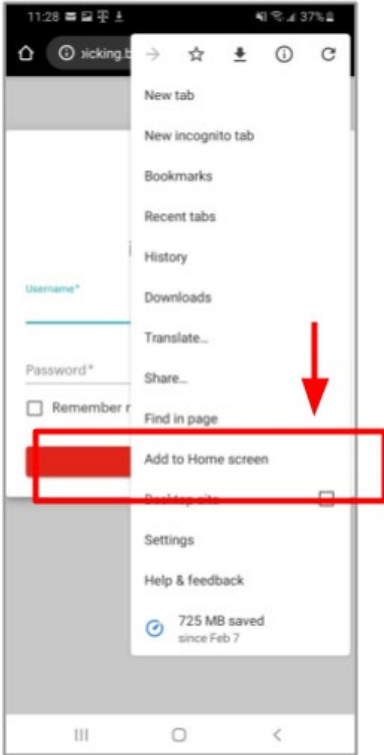
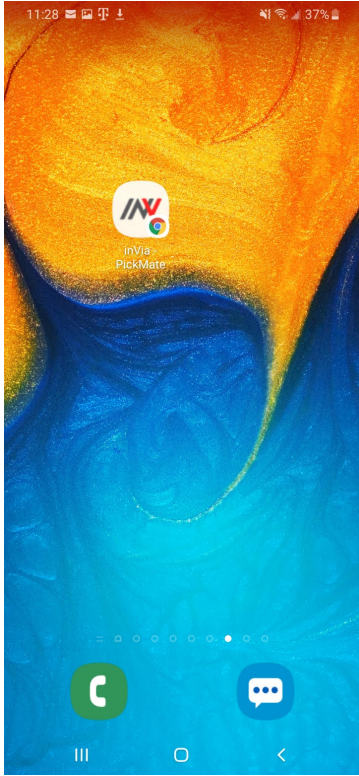
6. Set up your Picker with a mobile device, and (ideally) some sort of scanner

You and your Picker can set up your Pick with whatever devices you feel most comfortable, but we recommend a mobile device on an armband, and a finger scanner.



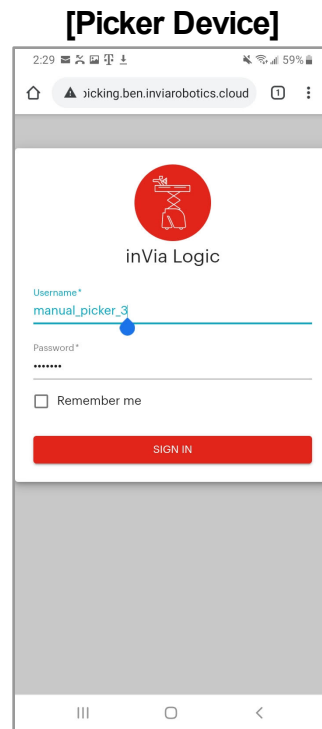
7. (Optional) - Add the PickMate URL to your Picker’s Device’s home screen

As a Warehouse Manager, you may want to add the PickMate URL to the home screen of your Pickers’ devices. This will make it easier for the Picker to log in in the future.

Mobile Chrome Browsers allow adding the URL to the Home Screen	After this, the URL looks like an app, and the Picker only needs to tap it
 A screenshot of a mobile Chrome browser interface. The address bar shows a URL starting with 'picking.b'. A menu is open, listing options like 'New tab', 'New incognito tab', 'Bookmarks', 'Recent tabs', 'History', 'Downloads', 'Translate...', 'Share...', 'Find in page', 'Add to Home screen', 'Bookmarks', 'Settings', and 'Help & feedback'. The 'Add to Home screen' option is highlighted with a red rectangle, and a red arrow points to it from the right.	 A screenshot of a mobile home screen with a blue and orange abstract background. An app icon labeled 'inVia PickMate' is visible on the screen. The icon features a stylized 'iV' logo. At the bottom, there are dock icons for a phone and messages.

Now the Picker will login, and begin the Pick

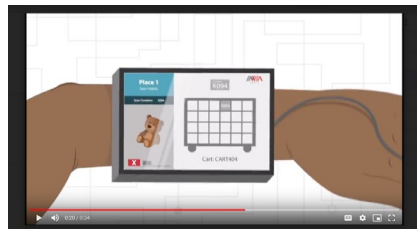
8. Picker logs into PickMate on their device



The Picker should enter the PickMate URL provided by loremIpsum into their device, and Login to their device with their login credentials provided by the Warehouse Manager.

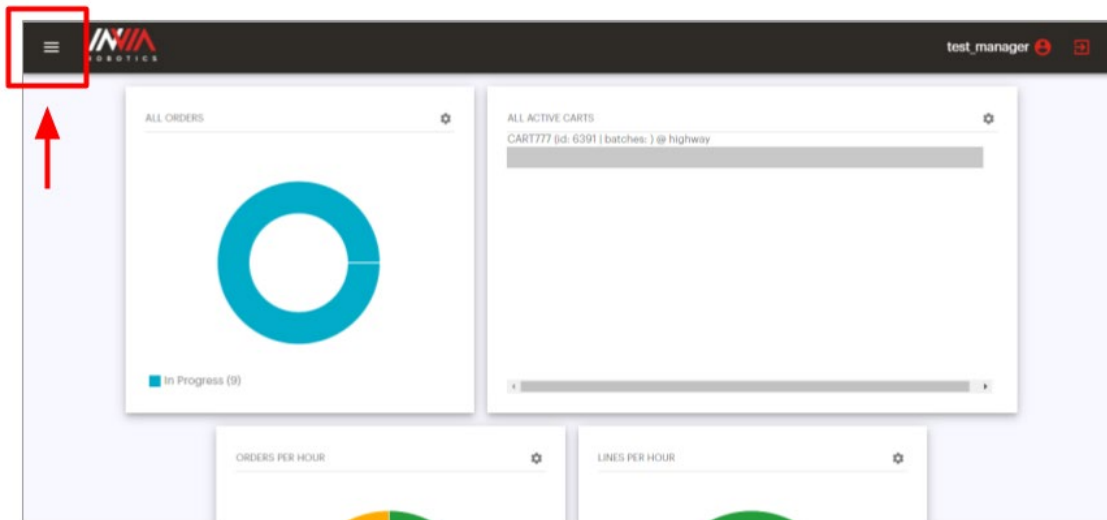


We recommend that the Picker locks their screen into landscape mode after logging in.

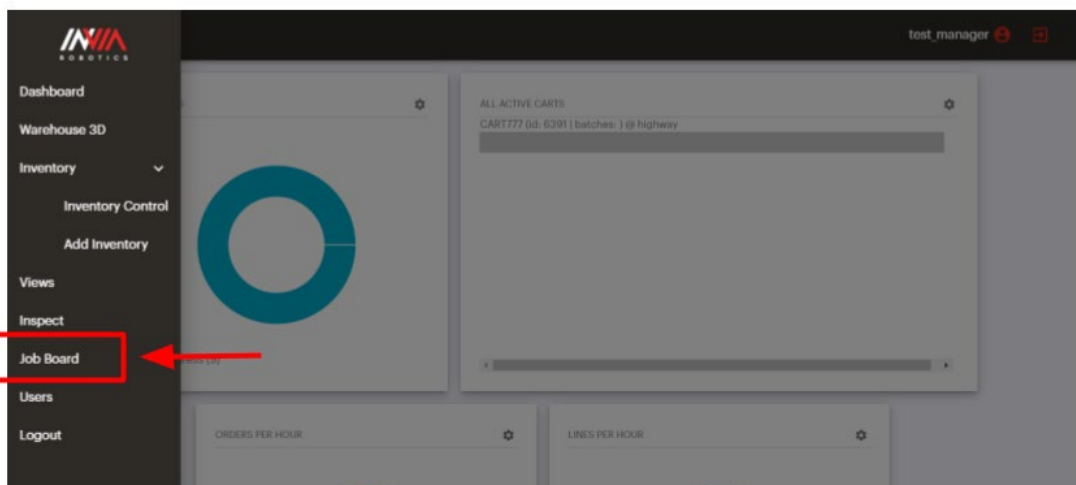


9. On the Warehouse Manager Dashboard, go to the Job Board

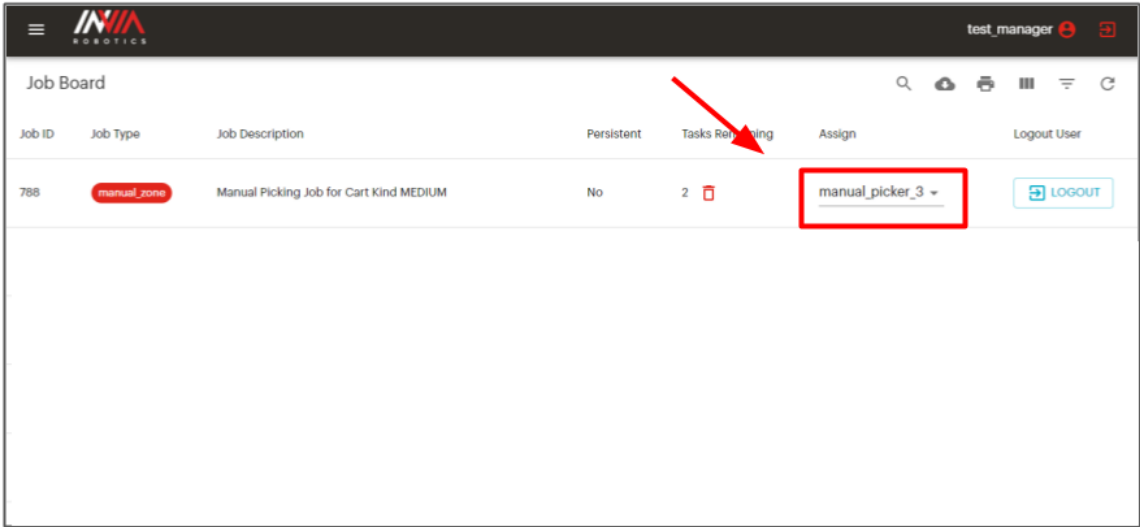
Click on the Hamburger Icon to open the menu.



Then click on 'Job Board.'

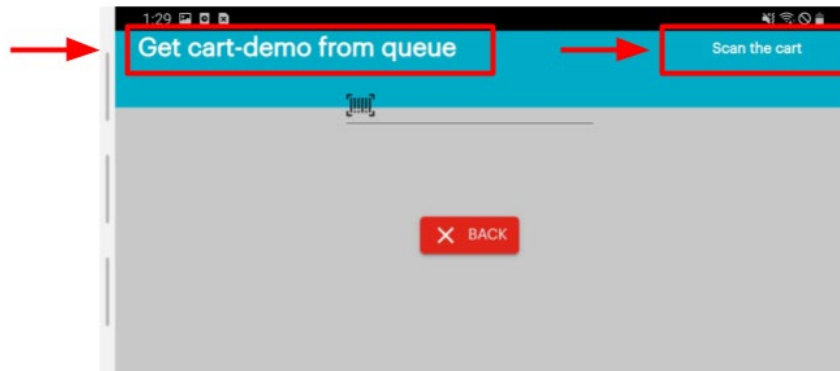


10. In the Job Board, assign the job to the Picker



Now the Picker will follow the instructions on their device

11. The Picker gets instructions on their device

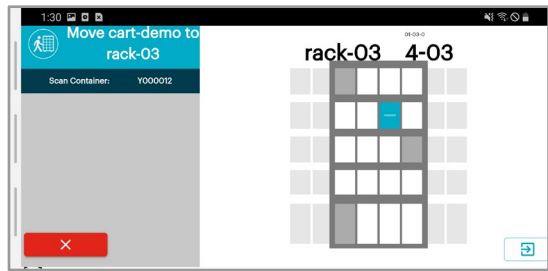
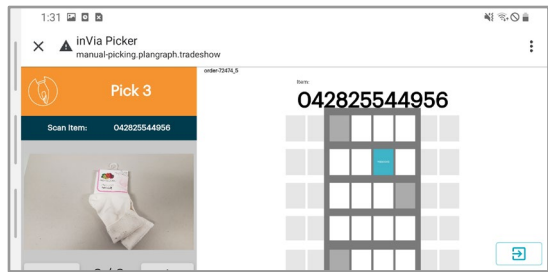
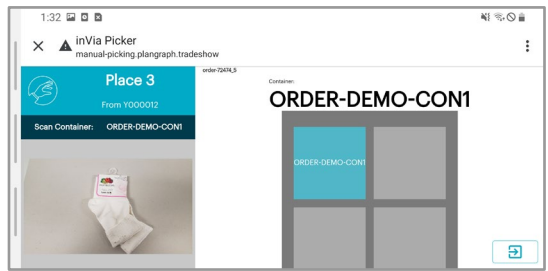
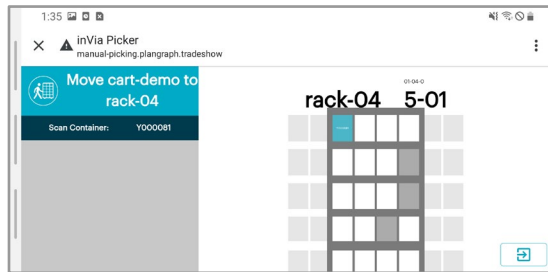
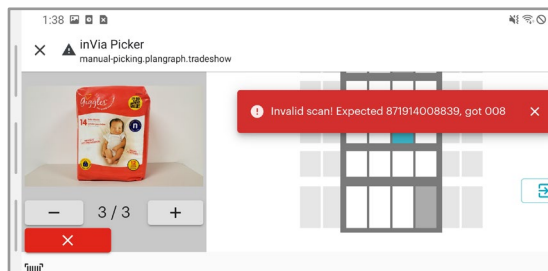


The Picker should follow the instructions.

12. The Picker will get further instructions

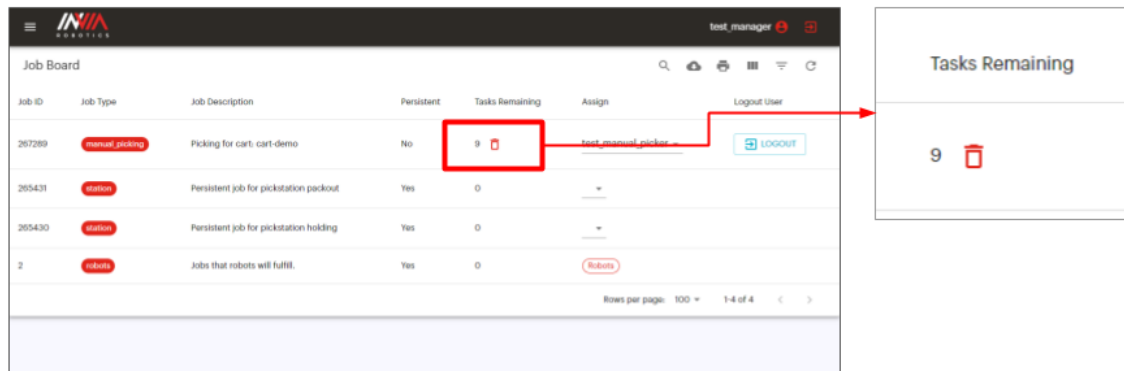
The Picker gets further instructions through their device and should follow them.

Below are some sample instructions.

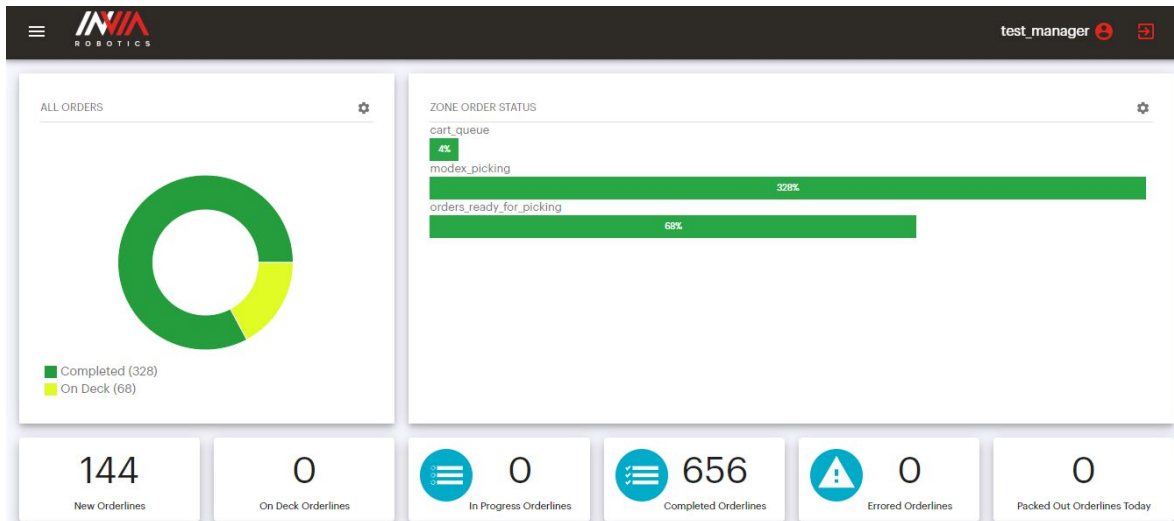
Picker receives to move Cart to a Rack, find a Container and then scan it in	
Picker receives instructions to Scan an item in and Pick a set number	
Picker receives instructions to place Eaches in a Container in the Cart	
Picker receives to move Cart to another Container, and the process starts again	
If the Picker makes an incorrect Scan, the system will not enter it, and will let them know to try again	

13. (Optional) The Warehouse Manager (you) can track this progress on the Job Board and the main dashboard page

If you stay on the Job Board, you will see the Tasks Remaining number to change in real time as Picks are fulfilled.



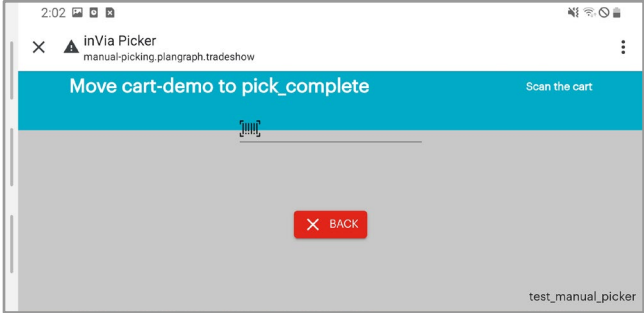
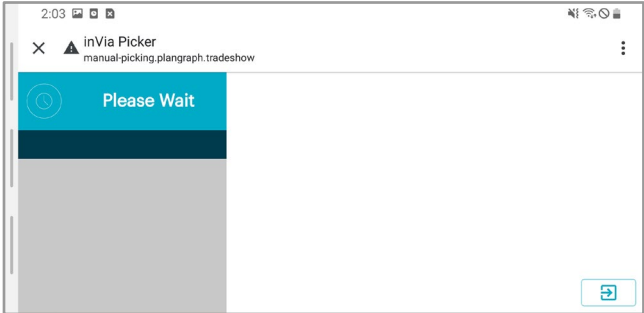
If you click on the Menu item and then click 'Dashboard,' you will end up on the Warehouse Manager Dashboard, which will also show the Picks being fulfilled.



After all Picks are fulfilled

14. After all Picks are fulfilled, Picker will get instructions to move the Cart

When all Picks are fulfilled, PickMate instructs the Picker to move the Cart to the customer’s defined zone (QC, Packstation, Hospital etc.).

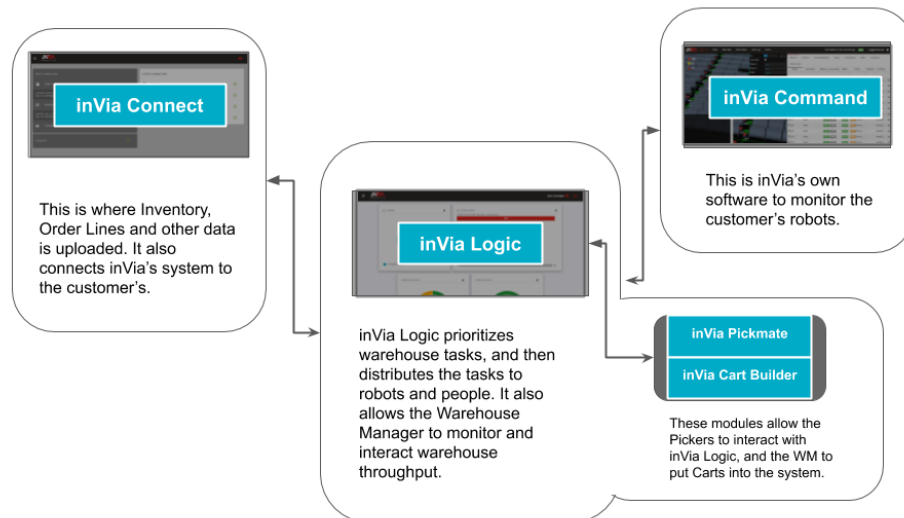
<p>PickMate instructs the Picker to bring the Cart to a zone.</p>	 <p>The screenshot shows a mobile application interface for 'inVia Picker'. At the top, there's a status bar with the time 2:02 and various icons. Below that, a header bar contains the app name and a warning icon. The main content area has a blue header with the text 'Move cart-demo to pick_complete' and a 'Scan the cart' button. Below this is a large grey area with a red 'BACK' button. The bottom right corner shows the text 'test_manual_picker'.</p>
<p>Picker waits for their next Pick.</p>	 <p>The screenshot shows the same 'inVia Picker' app. The header bar is the same. The main content area now has a blue header with a circular progress indicator and the text 'Please Wait'. Below this is a large grey area. The bottom right corner shows a small blue icon.</p>

14. And that is it!

Congratulations! You have fulfilled your first pick!

Appendix

Overview of loremIpsum's Software Systems



Three Main Systems

loremIpsum Logic

loremIpsum Logic prioritizes warehouse tasks, and then distributes the tasks to robots and people. It also allows the Warehouse Manager to monitor warehouse throughput and interact with the system driven labor management decisions.

The Warehouse Manager will employ two subsystems of loremIpsum Logic - PickMate and Cart Builder - to fulfill their first order.

loremIpsum Connect

This is where Inventory, Order Lines, and other data is uploaded by the Warehouse Manager. It connects loremIpsum's system to the customer's system and transforms the data.

loremIpsum Command

This is loremIpsum's own software to monitor the customer's robots.

Printable loremIpsum Quick Start Guide

On the next page there is a printable loremIpsum Quick Start Guide for your Pickers.

We recommend printing the next page out, filling the URL in section 1 with a pencil or pen, laminating the page and then posting it wherever Pickers can see it.

PickMate Guide



→



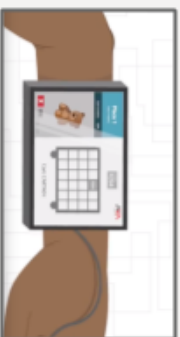
Tap the URL your Warehouse Manager has added to your Home Screen, or enter the URL on a Mobile Chrome Browser manually:

2



Login with your credentials. If you do not have them, ask your Warehouse Manager to either provide them for you, or to make a new profile.

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You can set up your device in whatever way is best for you, but we recommend mounting the device on an armband, and locking it into landscape mode.

And that is it! PickMate will tell you what to do, and all Picks will be recorded and sent back to your Warehouse Manager.