Configuring the Pick App

Last Modified on 05/11/2021 5:14 pm EDT

> This guide explains how to configure the Pick App for use on a mobile device. It is intended for system administrators.

The Pick App helps you manage outgoing shipments from a mobile device. This app is designed to be installed on either an individual's mobile device or a shared mobile device, depending on the data you want to track.

Before You Start

The system administrator needs to prepare the following details:

1. Configure aACE for mobile apps (https://aace5.knowledgeowl.com/help/configuring-aace-for-mobile-apps).
2. Obtain the app by emailing a request to aACE Support (), then deploy it on the needed devices.
3. In aACE, set up the user records (http://aace5.knowledgeowl.com/help/creating-new-users) for Pick App users. Depending on your workflows, this can be handled in different ways:
   - Generic Users — A team member record for *each* shared device that will be running the app (e.g. "Pick.App01", "Pick.App02"). Note: Users *cannot* be logged in simultaneously on two devices — each shared device must have its own user.
   - Named Individuals — A team member record for each person who uses the app. This method can help with auditing productivity because each shipment picked from the app logs the name of the user that picked it. Note: Users *cannot* be logged in simultaneously on two devices. For example, if a user has aACE open on a desktop, then posts data to aACE from the Pick App, the desktop session will be shut down.

Configuring the App

After downloading the app to a device, the first time you open it, the app will display the Settings screen for configuration.

- aACE Server Address — Enter the IP or DNS alias for your aACE server. If you do not know this address, please consult your system administrator.
- aACE File Name — Enter the name of the aACE Mobile file hosted on your server. Unless your system has been renamed, this should be "aACE Mobile".

- aACE Account Name and Password — Enter the aACE login credentials for the generic user accounts or the actual team members who will use the app.

Tap the popover button (⬛) and tap Configure App. This will download default settings and the needed master and transaction data from aACE.

Using the App

After you finish configuring the app, tap Done to start the initial data sync and begin using the app (https://aace5.knowledgeowl.com/help/using-the-aace-pick-app).

Actions Menu

The Actions menu has additional options for managing data.

The app stores data temporarily, then transfers it back to aACE as the central repository. Only data that has changed in the app or in aACE is transferred. This helps maximize the speed. After extended usage though, there may be discrepancies in the data time stamps (e.g. data that exists in aACE, but doesn't show up in the app). Resetting the data quickly creates a new baseline of accurate records.

- **Configure** — Verifies the server connection, resets the app data, downloads any needed settings from your aACE mobile file, and refreshes all master data, then all transaction data. This may take a significant amount of time if you are storing a large amount of master and transaction data in your app.
- **Done** — Refreshes the transaction data and opens the app for use.
- **Refresh Transaction Data** — Syncs all transaction data on demand (see below for details).
  Note: Transaction data is refreshed regularly during normal use of the app, but irregularities may occur due to the nature of syncing. If you notice issues with the data, you can troubleshoot by tapping this link to get a clean update from aACE.
- **Refresh Master Data** — Syncs all master data (see below for details).
  Note: Master data is only updated when the app is initially configured or when you manually refresh it. This minimizes the data synced between the app and aACE. If your team updates any relevant master data in aACE, manually refresh master data in the app to retrieve the latest data.
- **Reset App** — Wipes all data from the app. After this reset, you must re-configure the app.
  Note: Resetting data clears out information that isn't being used, which helps maintain

the app's responsiveness.

Pick App Master Data

- Shipping-type line item codes in Active status

Pick App Transaction Data

- Shipments in Pending status
- Serial balances
- Manufacturer lot balances

Pick App Specific Settings

These settings can help customize the app to your company and personal workflows:

- **Enable batch workflow / Auto-select 'X' shipments** — You can prepare a batch of work beforehand (e.g. if some of your work locations have poor WiFi connectivity, if you work on multiple shipments at one time, etc). You can download the details for multiple shipments (where 'X' represents the number of shipments to download) and update the Tracking Status to In Progress. This prevents other Pick App users from also downloading them.
- **Quick Start mode** — When the batch workflow is enabled, this setting automatically starts the pick process when you enter detail view for a shipment. This is more useful when you complete shipments one-by-one (as opposed to working on the shipments according to total number of items to pick, locations in a warehouse, or other sequence). Do not use Quick Start mode if you need to review shipment details before starting to pick items.
- **Use device camera to scan barcodes** — If a [barcode scanner](http://aace5.knowledgeowl.com/help/considerations-and-peripherals-for-mobile-apps) is not available, you can enable this setting and use the device camera instead. In your device iOS settings, make sure FileMaker has access to the camera.
- **Automatically sort list by** — Specify the default criterion for ordering the list view (e.g. by delivery date, carrier service, etc).