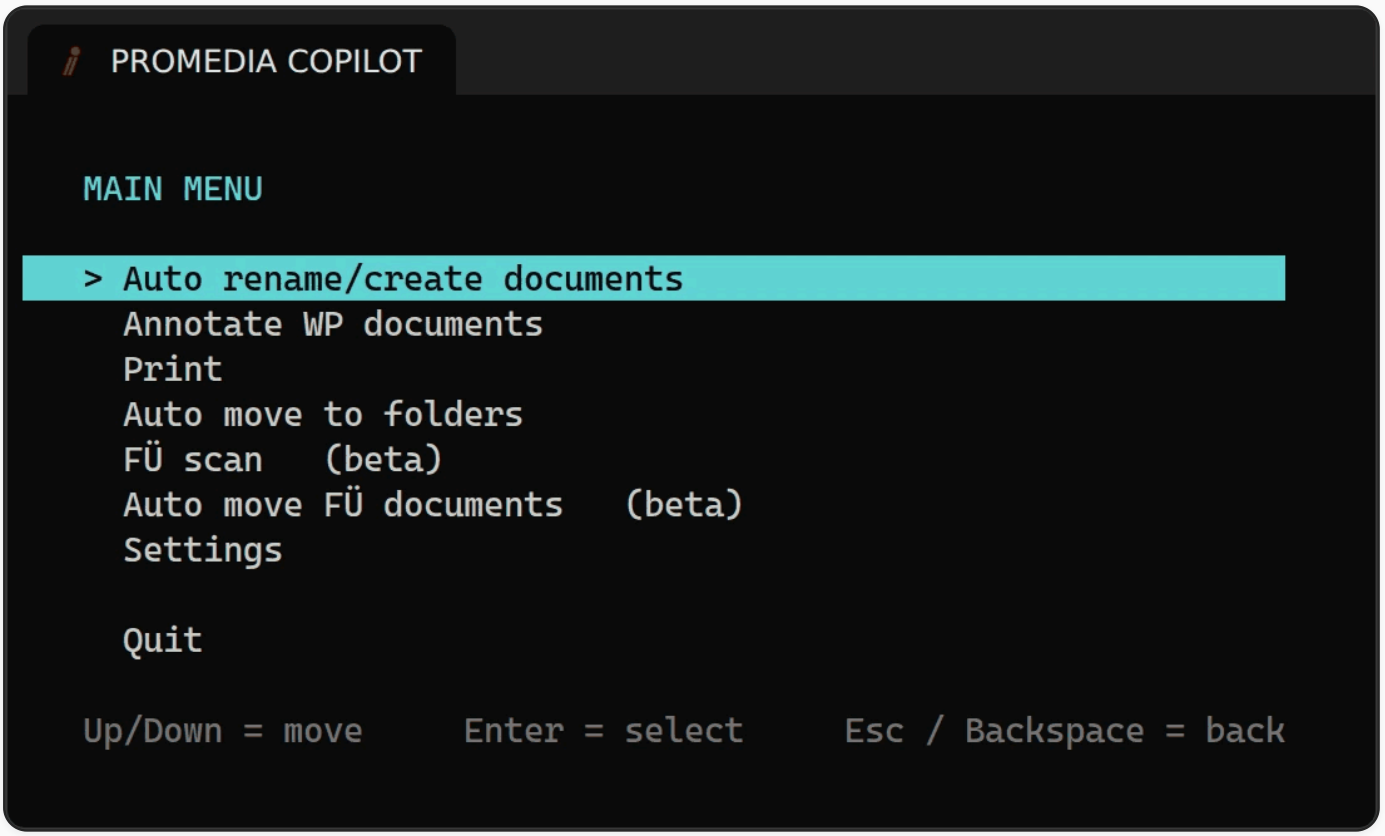
PROMEDIA COPILOT

User Guide

Rename pick lists and delivery notes from Business Central, create groupage sheets and pump lists, print them and file them in the right folders.



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1 WHAT COPILOT IS

Business Central saves pick lists and delivery notes as PDFs with names like `Custom Picking List.pdf` or `Delivery Note (2).pdf`. Every day the same steps follow: rename, mark groupages, build pump lists, print, file.

PROMEDIA COPILOT reads the PDFs itself, pulls out order number, customer, address and serial numbers, and does the rest. It runs only on your PC, needs no internet and sends nothing out.

A normal day

STEP	MENU ITEM	WHAT HAPPENS
1		Save the day's PDFs from Business Central to the Downloads folder.
2	**Auto rename/create documents**	Files get proper names, groupage sheets and pump lists are created.
3	**Annotate WP documents**	If needed, write notes for the warehouse straight onto the pick list.
4	**Print**	Delivery documents twice, pick lists once.
5	**Auto move to folders**	Every file goes to its folder.
6	**FÜ scan**, **Auto move FÜ documents**	Signed delivery notes scanned after pickup are renamed and filed.

2 Documents and names

COPILOT knows four kinds of documents. Each one gets a fixed name.

CODE	DOCUMENT	NAME AFTER RENAMING
PWS	Delivery note	`PWS004410_SORD26-00412.pdf`
PAC	Packing list	`PAC004410_SORD26-00412.pdf`
WP	Warehouse pick list	`WP004521_NESTLE_DE_SORD26-00412.pdf`
FÜ	Signed delivery note, scanned after pickup	`FÜ_Nestle_DE_SORD26-00398_260930.pdf`

A delivery note and a packing list with the same number form a pair. COPILOT always prints and files a pair together.

3 Install

COPILOT needs no installation. Unpacking the folder is enough.

1. On GitHub choose **Code**, then **Download ZIP**.
2. Unpack the ZIP file, for example to `Documents\PROMEDIA COPILOT`.
3. Double-click `PROMEDIA COPILOT.bat`.

The three Excel templates must stay in the folder under their names. This guide is in the folder as a PDF too.

Desktop shortcut

1. Right-click `PROMEDIA COPILOT.bat`, then **Create shortcut**.
2. Drag the shortcut to the desktop.
3. Right-click the shortcut, choose **Properties**, **Change Icon** and select `promedia_copilot.ico`.

4 Update

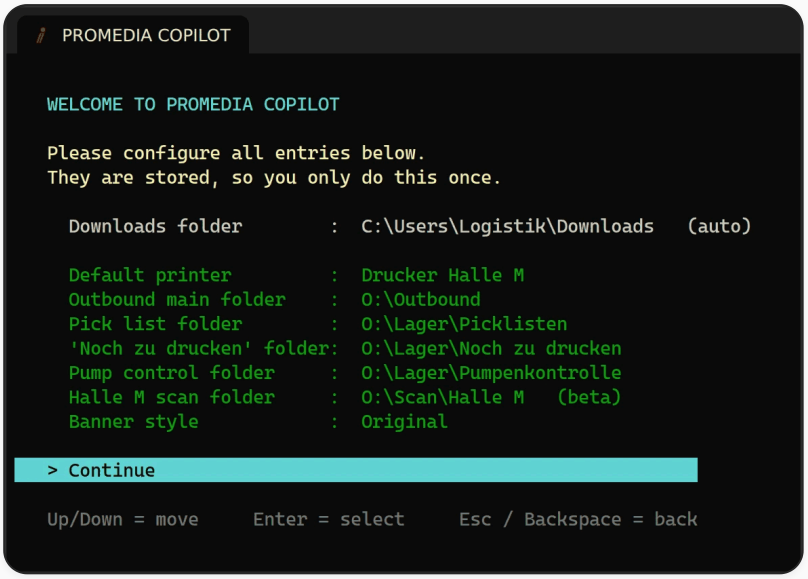
COPILOT never connects to the internet on its own. You fetch an update yourself.

1. Download the new version: **Code**, then **Download ZIP**. The file is called `PM-COPILOT-main.zip`.
2. Put the ZIP file as it is into the folder where `PROMEDIA COPILOT.bat` is. **Do not unpack it.**
3. Start COPILOT. It finds the ZIP file, shows the new version and asks whether to install it.

Settings, remembered pairs and printed markers stay as they are. The ZIP file is deleted after the update. A ZIP file that is not newer than the installed version is removed too.

5 First start

On the first start COPILOT asks once for printer and folders.



Green is set, white still needs a value. **Continue** appears once everything required is green.

SETTING	PURPOSE
Downloads folder	Where the PDFs from Business Central land.
Default printer	Printer for delivery documents and pick lists.
Outbound main folder	Root of the shipping folders: country, then customer.
Pick list folder	Where processed pick lists go, with their groupage sheets and pump lists.
'Noch zu drucken' folder	Optional: second target for pick lists to be printed again later.
Pump control folder	Where the pump scan control files go.
Halle M scan folder	Where the scans of signed delivery notes land.
Banner style	Large banner or a single plain line.

How the shipping folders must look

COPILOT searches the outbound folder by country, customer and, if present, location and month.

Countries may be named in German, English or as a code (`Deutschland`, `Germany`, `DE`). Month folders are recognized in many spellings, such as `Oktober 2026`, `Okt 26` or `2026-10`.

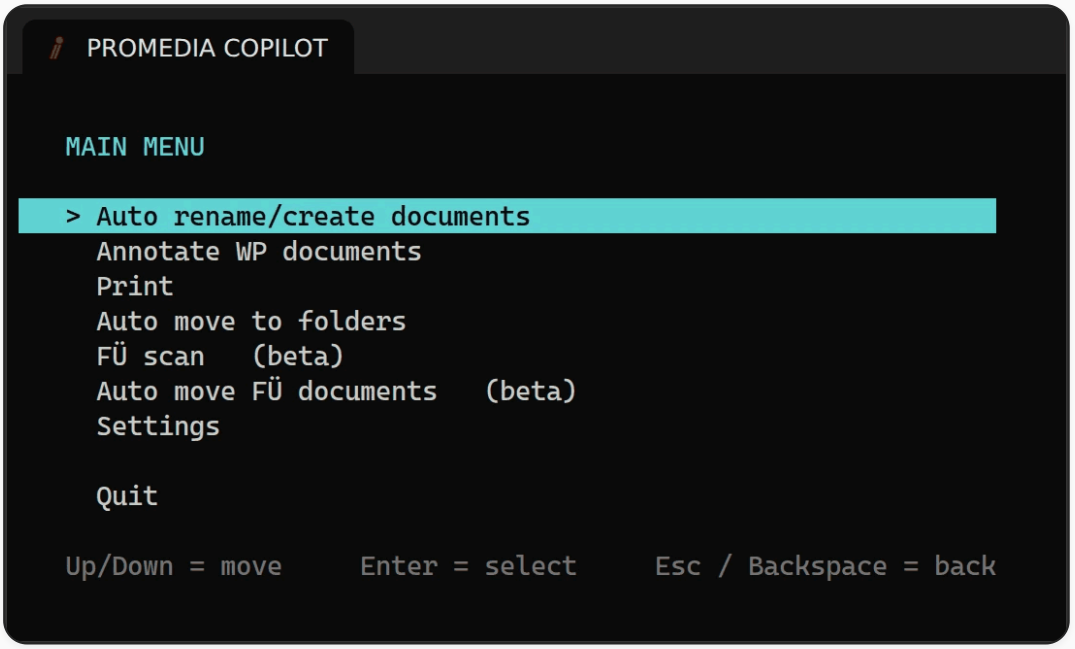
Plain year folders such as `2025` count as archive and are never offered as a target.

```
O:\Outbound
├── Deutschland
│   └── Nestle DE
│       ├── 2025  archive
│       └── September 2026
├── Frankreich
│   └── Hemodia
│       └── Oktober 2026
└── Saudi Arabien
    └── Tamer
        ├── Jeddah
        └── Riyadh
```

6 Controls

COPILOT is used with the keyboard only. No mouse needed.

KEY	EFFECT
`↑` `↓`	Move up or down the list
`Enter`	Select
`Esc` or `Backspace`	Back
`y` or `j`, then `Enter`	Yes to a yes/no question. Anything else counts as no.



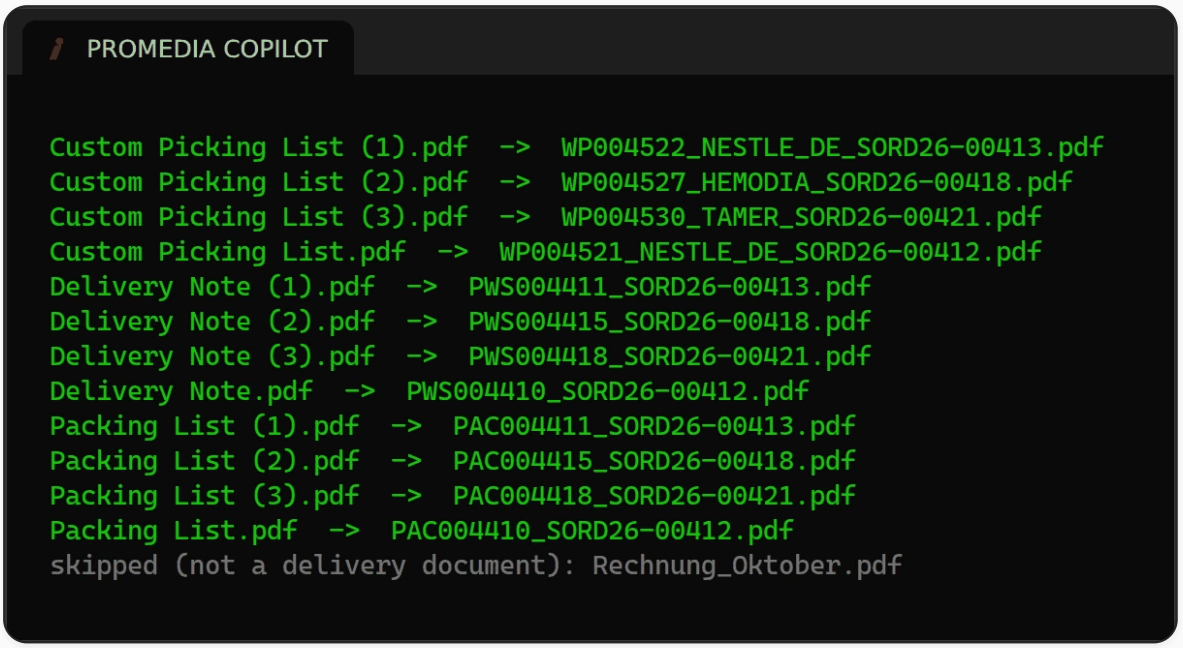
The main menu. The highlighted line is selected.

MENU ITEM	CHAPTER
Auto rename/create documents	Rename, groupage, pump picks (7 to 9)
Annotate WP documents	Annotate pick lists (10)
Print	Print (11)
Auto move to folders	Move to folders (12)
FÜ scan, Auto move FÜ documents	Scanned delivery notes (13)
Settings	Settings (14)

7 Rename documents

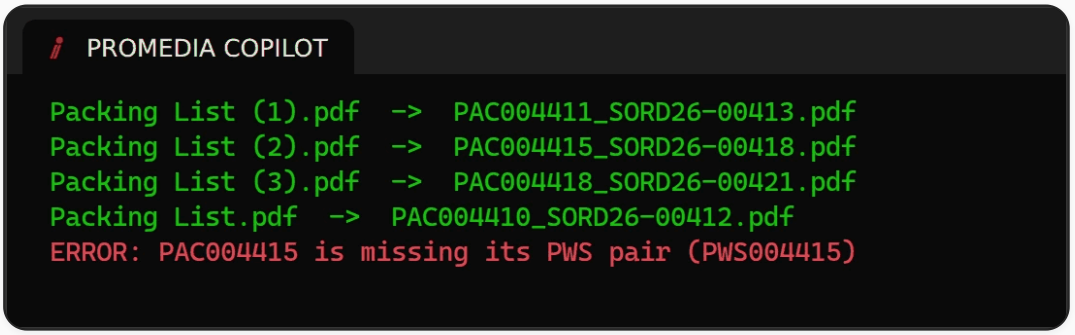
Menu item **Auto rename/create documents**. It goes through every PDF in the Downloads folder.

COPILOT reads the PWS, PAC and WP numbers and the order number out of every PDF and renames the file. A pick list also gets the first two words of the customer name. A document with several orders gets the first order number plus the last four digits of the others, for example `SORD26-00405_0406`. Anything that is not a Business Central document stays untouched.



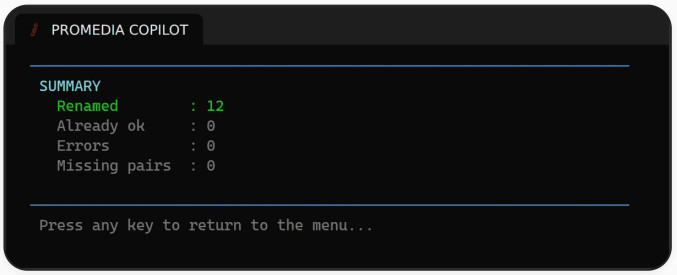
Old name on the left, new name on the right. The invoice at the bottom is skipped.

A delivery note without its packing list, or the other way round, shows up as a red line. A document is then still missing from Business Central.



Each run ends with a summary: renamed files, files already correct, errors and missing pairs.

After that it goes straight on to groupage and pump picks, if COPILOT finds any.



8 Groupage

Two or more pick lists for the same customer form a groupage.

After a `y`, COPILOT stamps **GROUPAGE** onto page 1 of each pick list and creates the groupage sheet from the template. Customer and pick numbers are already filled in.

```
PROMEDIA COPILOT

GROUPAGE detected:  NESTLE DE   (2 pick lists)
  WP004521_NESTLE_DE_SORD26-00412.pdf
  WP004522_NESTLE_DE_SORD26-00413.pdf

Create groupage? (Y/N): y
  marked GROUPAGE: WP004521_NESTLE_DE_SORD26-00412.pdf
  marked GROUPAGE: WP004522_NESTLE_DE_SORD26-00413.pdf
  created        : 2026-10-02_Groupage_NESTLE_DE.xlsx
  prefilled      : customer + 2 pick number(s)
  please fill in the remaining fields
```

The sheet opens in Excel on purpose. Country, carrier, pallet count and planned pickup are not on the pick list. Fill them in, save and close Excel.

Pickübersicht

Kunde	NESTLE DE
Land	
Abholdung durch	
Geplante Abholung	
Fertigstellung Pick	
Angemeldete PAL	
Einschätzung PAL Lager	
Besonderheiten	

Picknummer	Fertig gestellt am:	Anzahl PAL
WP004521		
WP004522		

The sheet as COPILOT creates it.

Pickübersicht

Kunde	NESTLE DE
Land	Deutschland
Abholdung durch	Schäfer
Geplante Abholung	06.10.2026
Fertigstellung Pick	05.10.2026
Angemeldete PAL	**5**
Einschätzung PAL Lager	5
Besonderheiten	

Picknummer	Fertig gestellt am:	Anzahl PAL
WP004521	05.10.2026	3
WP004522	05.10.2026	2

The same sheet filled in.

Warehouse Activity Header GROUPAGE

Pick WP004521

Destination
Nestle DE

Source Document
SORD26-00412

Shipment Date
01.10.2026

Action Type	Bin	Item	Description	Serial No.	Qty
Take	HM02.04	100245	Compat Ella Pumpe	N24051201	1
Place	PICKING	100245	Compat Ella Pumpe	N24051201	1
Take	HM02.04	100245	Compat Ella Pumpe	N24051202	1

The GROUPAGE stamp at the top right of the pick list.

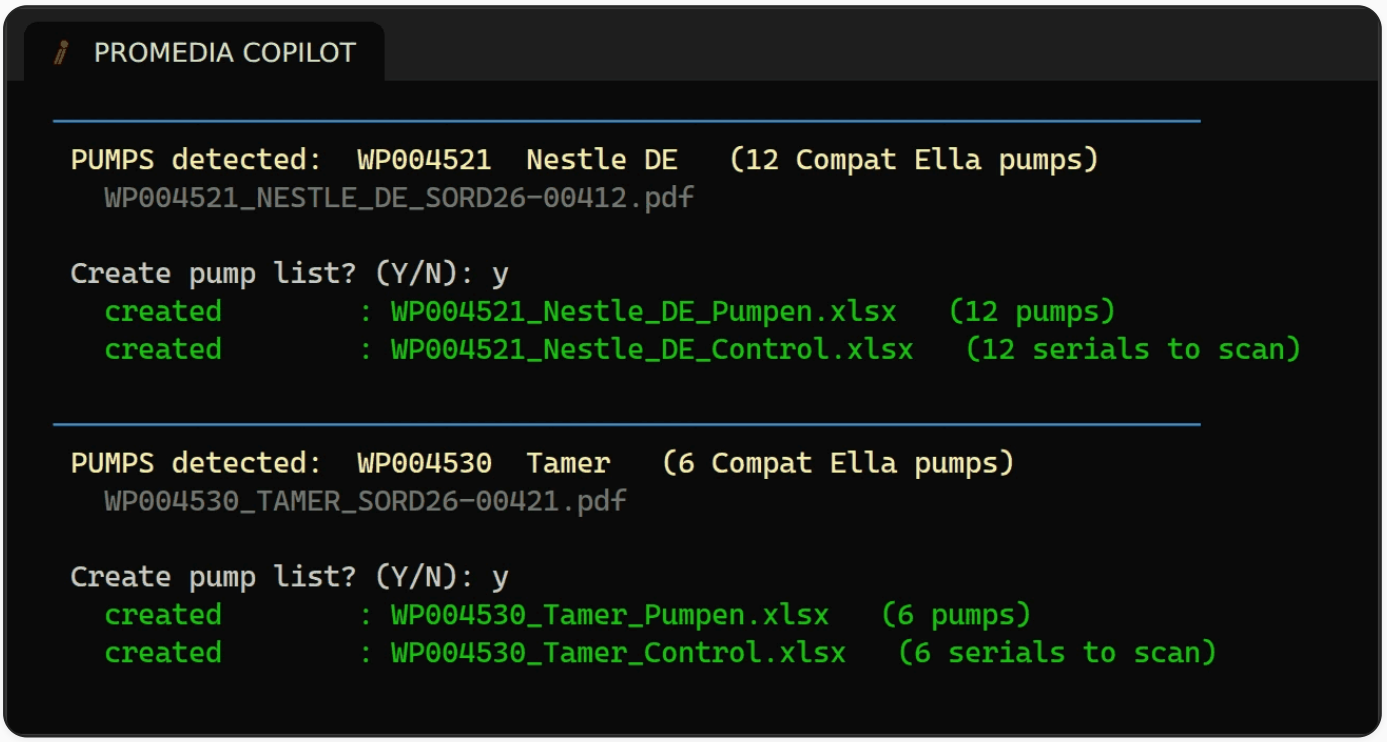
9 Pump picks

If a pick list contains pumps, COPILOT offers two Excel files.

Both are built straight from the serial numbers in the PDF:

`Pumpen.xlsx`: serial numbers grouped by bin, with counts and a total. Rows already in the PICKING bin are left out on purpose.

`Control.xlsx`: the scan sheet for the warehouse floor. A scanned serial number turns green. Anything still red was missed.



COPILOT asks separately for every pick list with pumps.

WP004521 Nestle DE Pumpen

Zeilenbeschriftungen	Anzahl von Serial No.
HM02.04	**7**
N24051201	1
N24051202	1
N24051203	1
N24051204	1
N24051205	1
N24051206	1
N24051207	1
HM02.05	**5**
N24051208	1
N24051209	1
N24051210	1
N24051211	1
N24051212	1
Gesamtergebnis	**12**

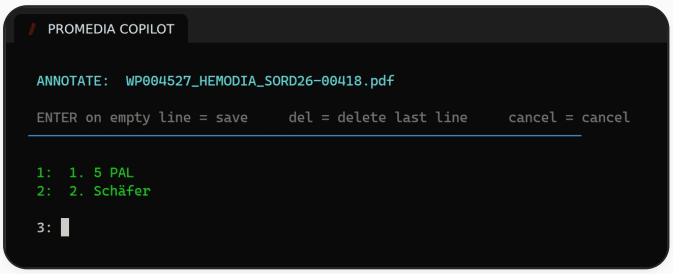
The pump list: serial numbers and count per bin.

10 Annotate pick lists

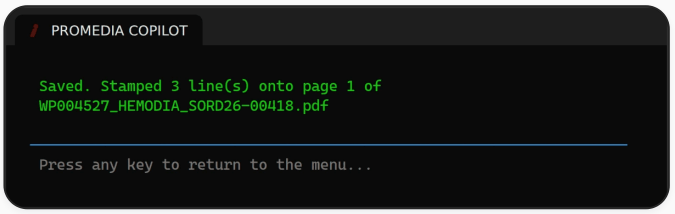
Menu item **Annotate WP documents**. Use it to write notes for the warehouse onto page 1 of a pick list.

1. Select the pick list from the list.
2. Type the text line by line and finish each line with `Enter`.
3. `Enter` on an empty line saves.

`del` removes the last line, `cancel` aborts. On a groupage the text goes below the stamp.



Two lines entered, the third stays empty.



Saved.

Warehouse Activity Header
Pick WP004527

1. 5 PAL
2. Schäfer
3. Abholung am 01.10.2026

Destination
Hemodia

Source Document
SORD26-00418

Shipment Date
02.10.2026

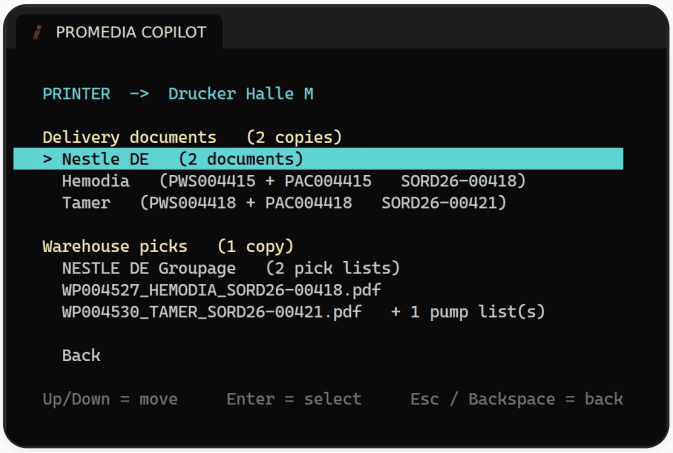
Action Type	Bin	Item	Description	Serial No.	Qty
Take	HM11.02	200114	Dialysefilter HD 1.8		96
Place	PICKING	200114	Dialysefilter HD 1.8		96

The text at the top right of the pick list.

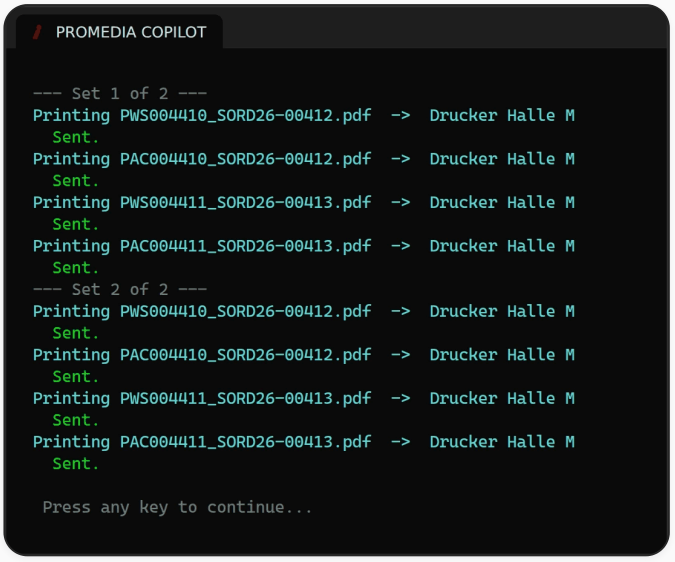
> The text is written into the PDF and cannot be removed afterwards. Read it once more before saving.

11 Print

Menu item **Print**. Delivery documents and pick lists are in one list and go straight to the configured printer.



Delivery documents at the top, pick lists below.



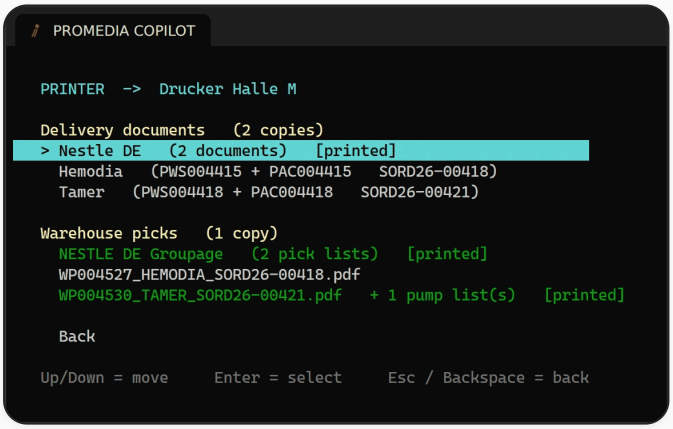
Two complete, sorted sets.

Delivery note and packing list come out as two complete, sorted sets.

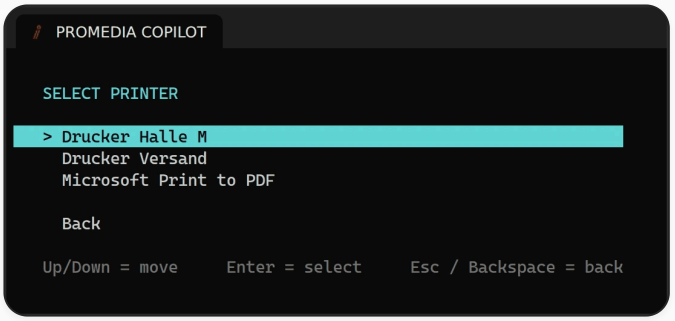
Pick lists print once. A groupage is one entry with all its pick lists.

Excel sheets open for a last check and are printed from Excel.

Anything already sent is marked `[printed]`, so nothing goes out twice by accident. The marker disappears once the files have left the Downloads folder.



Printed entries are green and carry `[printed]`.



The printer is changed in the settings.

12 Move to folders

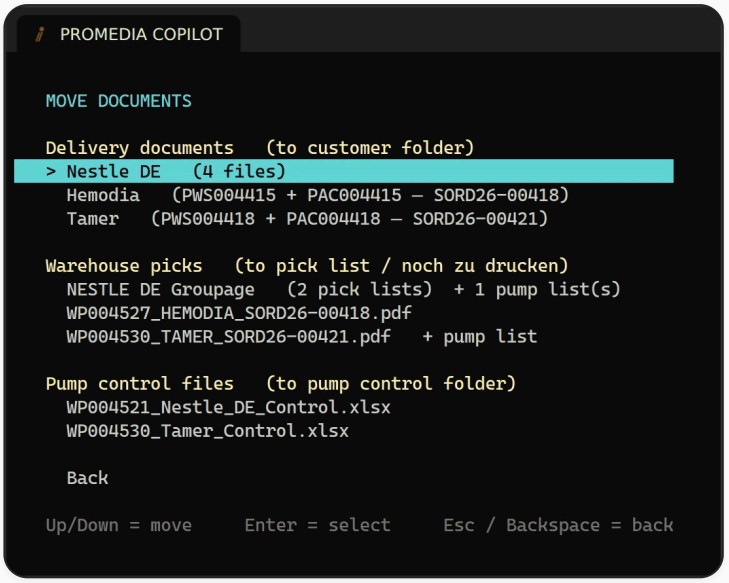
Menu item **Auto move to folders**. COPILOT files everything in three groups.

Delivery documents go to the customer folder.

Warehouse picks go with their pump list or groupage sheet to the pick list folder.

Pump control files go to the pump control folder.

Deliveries to the same customer, location and country move together.



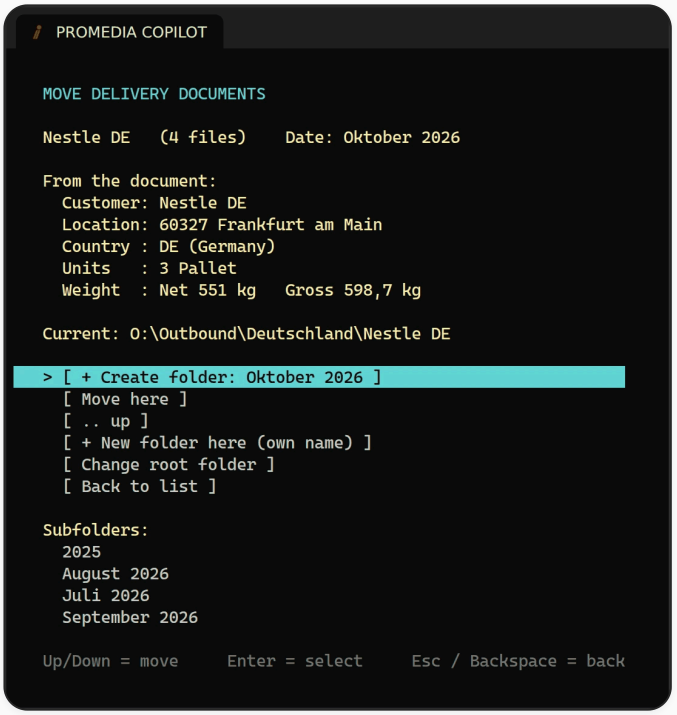
The folder navigator

For delivery documents a small folder navigator opens.

From the document shows what the delivery note says: customer, location, country, packages and net and gross weight. Pallets and cartons (CT) are counted separately.

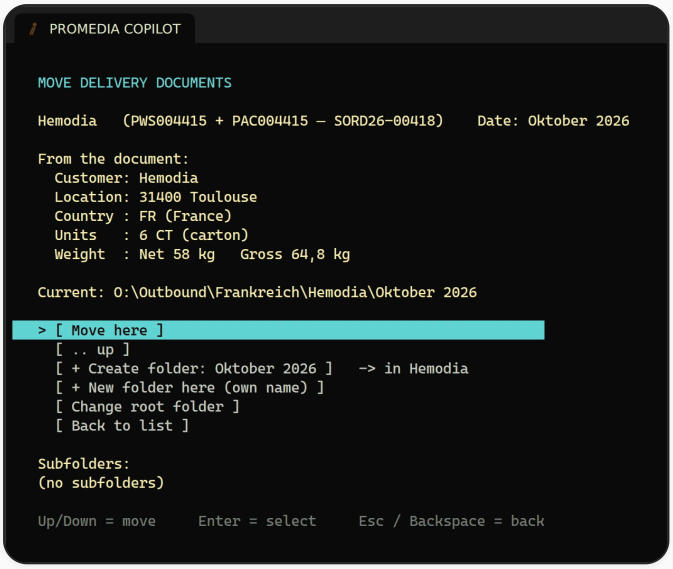
Current is the folder COPILOT picked: country, customer, location and month, as far as matching folders exist.

If the month folder is missing, COPILOT first offers to create it, named like the existing month folders.

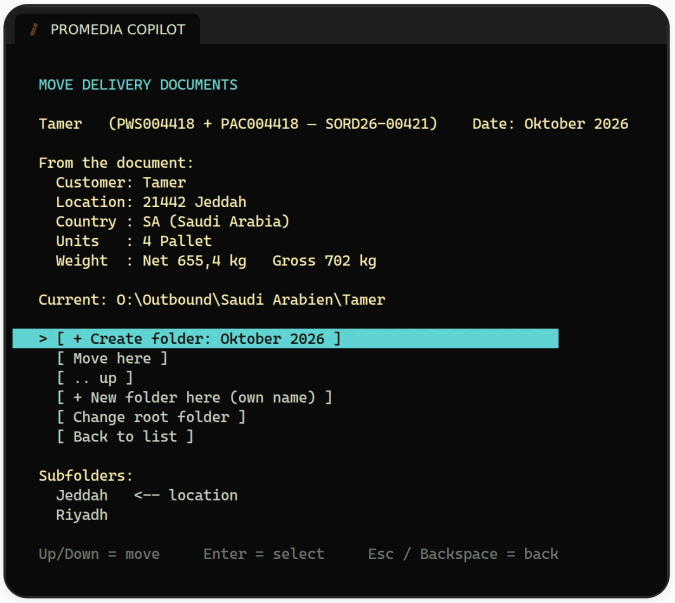


The month folder Oktober 2026 does not exist yet.

If the month folder exists, the navigator opens it directly and **Move here** is preselected. For customers with several locations it lands in the right one. One level up, the matching location is marked `<-- location`.



The month folder exists, Move here is selected.



Saudi Arabien, Tamer: the location Jeddah is marked.

NAVIGATOR ENTRY	EFFECT
Move here	Move into the folder shown.
.. up	One level up.
+ Create folder	Create the missing month folder.
+ New folder here	Create a folder with your own name.
Change root folder	Choose a different outbound main folder. It then applies in the settings too.
Back to list	Go back without moving.



Pick lists, groupage sheet and pump list have been moved.

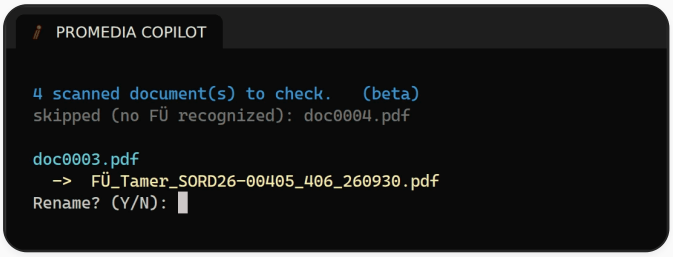
If a file is open elsewhere, for example in Excel, COPILOT reports it as failed and gives the reason. Close the file and repeat the step.

13 Scanned delivery notes

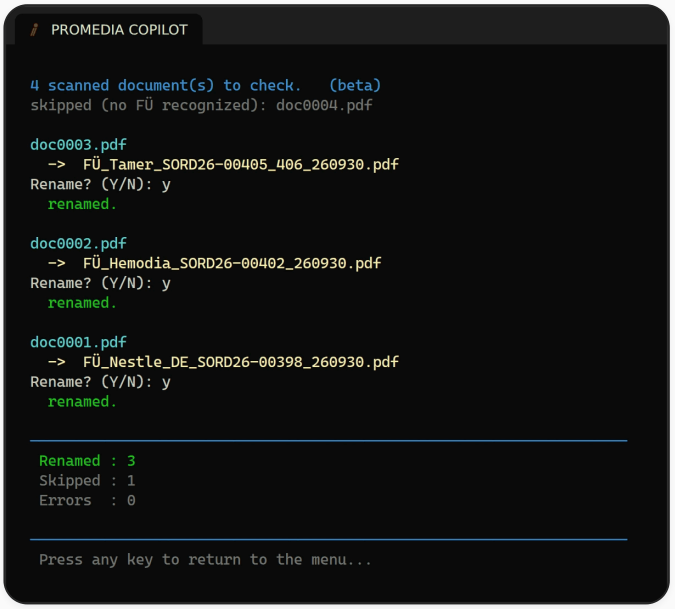
This feature is still in beta. Check every proposal briefly.

The warehouse scans every signed delivery note after pickup. The scans land in the Halle M folder with names like `doc0001.pdf`.

FÜ scan reads them with the text recognition built into Windows. No internet and no extra software are needed. COPILOT proposes a name: `FÜ_<customer>_<order number>_<scan date>.pdf`. You confirm each proposal with `y`.



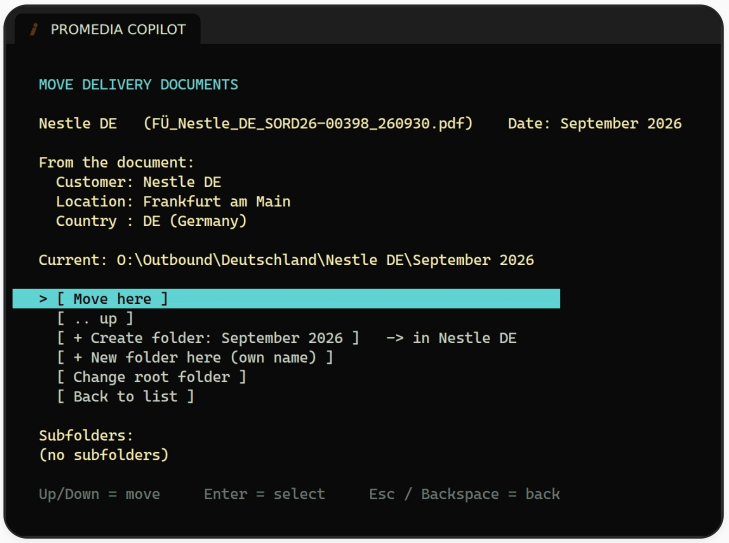
A proposal waits for confirmation.



At the end: renamed, skipped, errors.

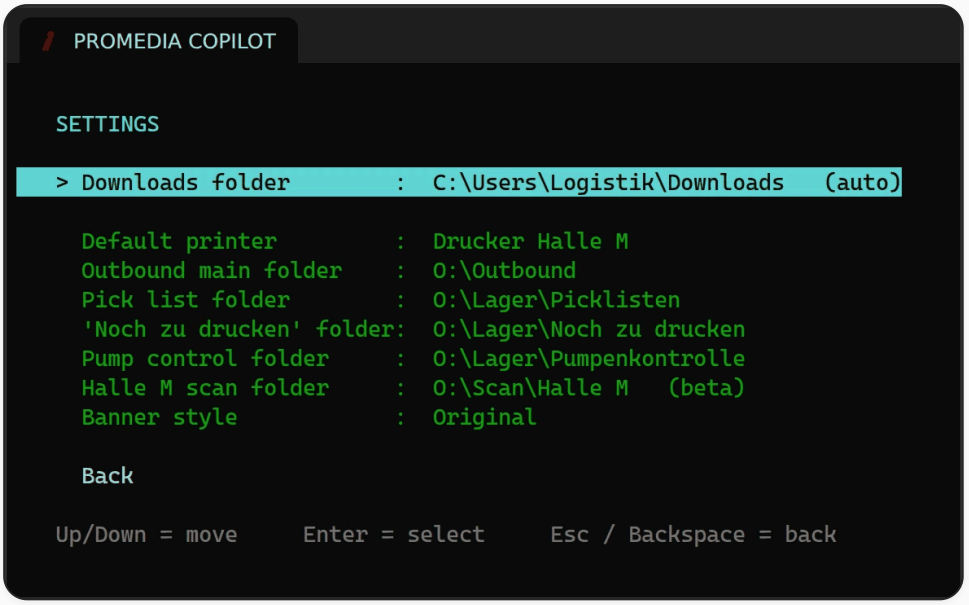
Auto move FÜ documents files the renamed scans into the same customer folders as the delivery documents. It uses the address and the date read from the scan.

Text recognition on paper is never perfect. Check customer, country and target folder before you choose **Move here**.



14 Settings

Menu item **Settings**. Printer and folders can be changed at any time, in the same list as on first start.



The settings are stored in a text file next to the program and never leave the PC.

Handing the folder to someone else

`reset.bat` clears your personal settings, remembered pairs and printed markers. You confirm by typing `RESET`. Program and templates are kept. On the next start COPILOT asks for folders and printer again.

15 Quick answers

A file was not renamed.

COPILOT only renames delivery notes, packing lists and pick lists from Business Central. Everything else stays as it is. If the file is open elsewhere, close it and run the step again.

A red line says "missing its pair".

A delivery note has no packing list, or the other way round. Save the missing document from Business Central to the Downloads folder and run the renaming again.

I wrote the wrong text onto a pick list.

The text cannot be removed. Save the pick list again from Business Central and rename it once more.

A document shows [printed], but I need it again.

You can still select it and print it again. The marker only prevents printing twice by accident.

COPILOT does not offer an update.

Check that the ZIP file sits unopened right next to `PROMEDIA COPILOT.bat`. If it is not newer than your version, it is deleted without asking.