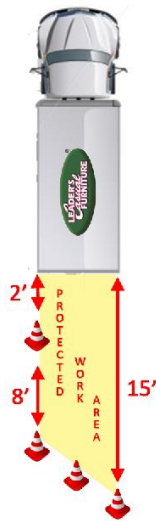


## How to Complete a Transfer

To ensure inventory accuracy the BoxKeeper Warehouse Management System (WMS) tracks and directs inventory movement. It does this through a caring team that accurately scans and reacts to the WMS visual cues. To inform the WMS that product has successfully transferred from the Distribution Center to a retail location complete the following steps:

### Safety is everyone's top priority

- ✓ Use proper lifting technique (Driver Manual 4.7 Proper Lifting Technique)
- ✓ Protect the work area with cones (Driver Manual Section 3.8 Cone Protected Work Area)



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## Best Practices

1. Put the strap on the back of the tablet over a cone that is in an area with strong WiFi signal and within site of the scanning process.



## Prepare to Scan

1. Turn on the tablet when in range of the store WiFi.

**Note:** If the tablet is turned on no in range of the store WiFi it will not acquire network connections and the BoxKeeper program will not work. If this happens and the tablet will not open network drives or you cannot find your icons reset the tablet while standing in range of the Leader's WiFi system.



2. Open BoxKeeper Web

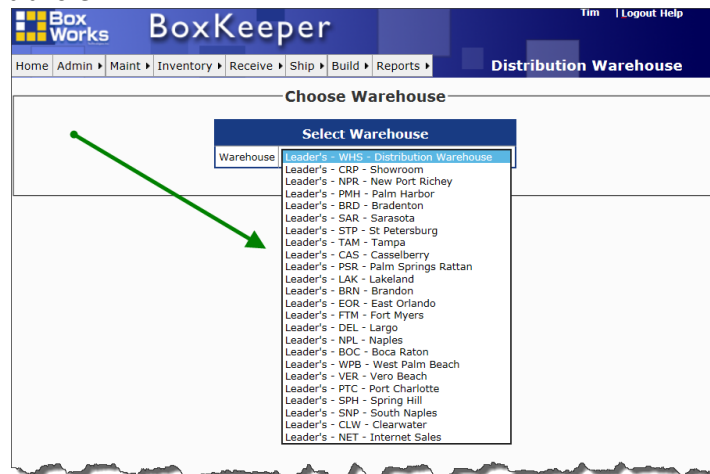
3. Log into BoxKeeper Web

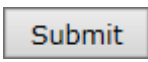
A screenshot of the BoxKeeper Warehouse Management System login page. The header is dark blue with the 'Box Works' logo on the left, 'BoxKeeper Warehouse Management System' in the center, and a 'Help' link on the right. Below the header, it says 'Please Log in to WMS'. There are two green input fields for 'Username' and 'Password'. Below the password field is a button labeled 'Enter Application'.

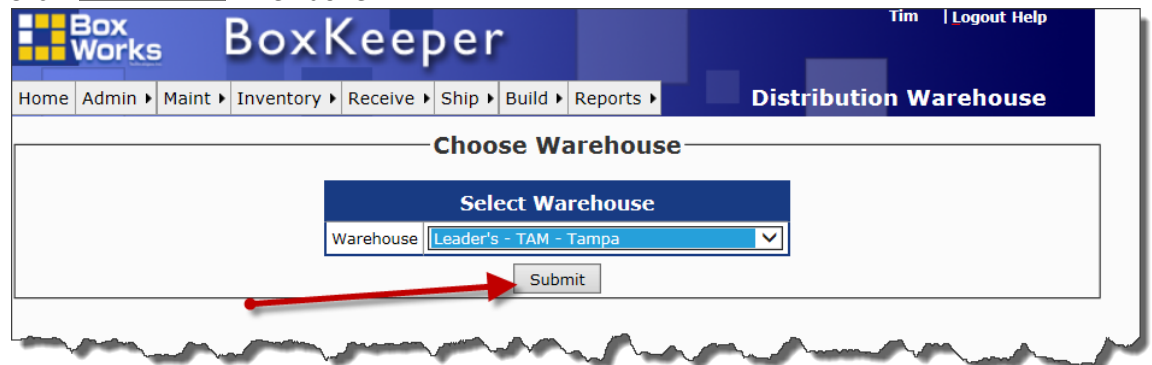
4. Update the location you are to the store location where you are performing the transfer
- a. Click on the location name in the top right of the screen.



- b. Select the location from the drop down list where you would like to perform the transfer

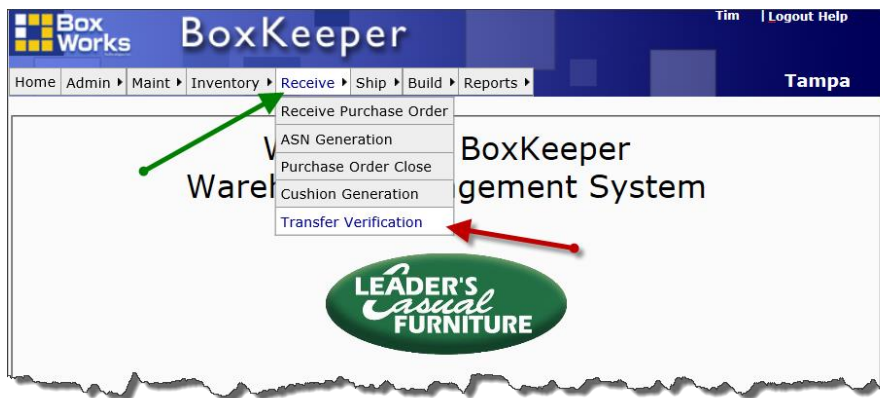


- c. Click  when done

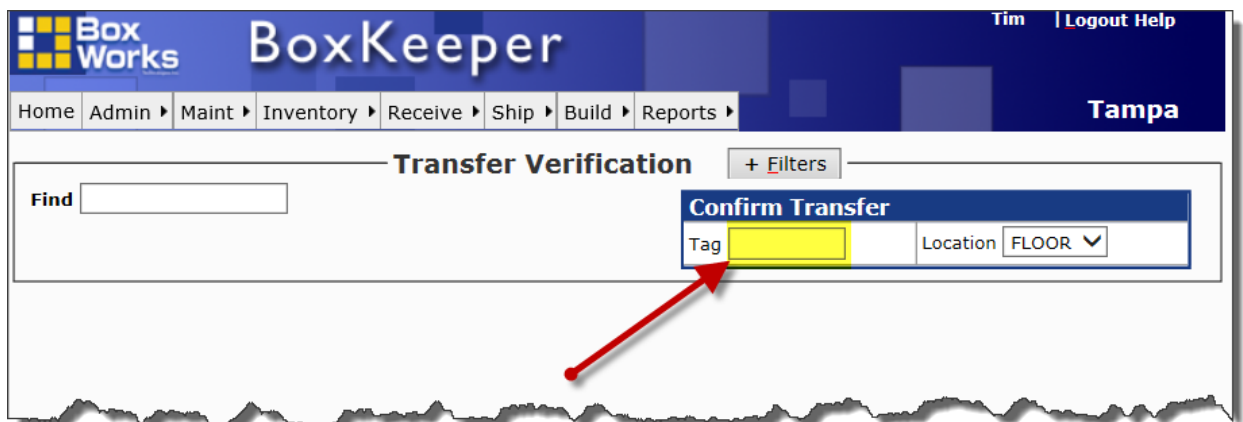


- d. The location selection is complete you are now returned to the BoxKeeper home screen.

5. Click the **Receive** drop down menu and click **Transfer Verification**



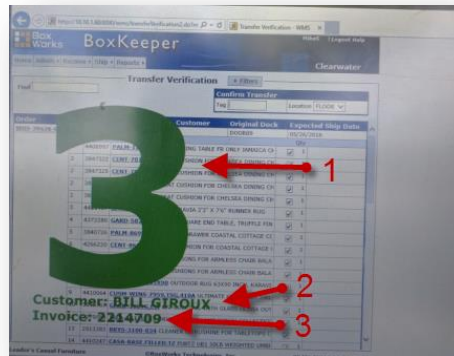
6. Make sure the cursor is in the "Tag" field. This is where your barcode scans need to register to start verifying the product coming off the truck against the transfer list.



## Screen Read Out

### Approved Scan

An approved scan means the item belongs at the location you are at. If an item is scanned and a Green number comes up on the screen the item belongs at the location. Below the green will be an invoice number and the customer's last name if the item is reserved for a customer.



#	What	Why
1	A green number appears when an item is being scanned to the correct location. The number will count up chronologically after each approved item is scanned	Having a green number display visually lets the user know that the item is being moved to the correct location
2	Customer Name	His allows the store team to separate their customer owned goods from stock
3	Invoice #	The invoice number that the item is reserved for. This store team identify the customer and give great service

### Incorrect Scan

An incorrect scan means the item does not belong at the location you are performing a transfer or you got distracted and scanned the same item a second time. If you believe the item should be at the location ask the store team member to look the item up and identify the rack location of the serial number in question. R:\Training\2.0 Level 1 Itinerary\Level 1 Week 1\3. Wednesday\1 Product Look-Up Page 7, #7

