Executive Mailing Service – Warehouse Stock Management Workflow Overview
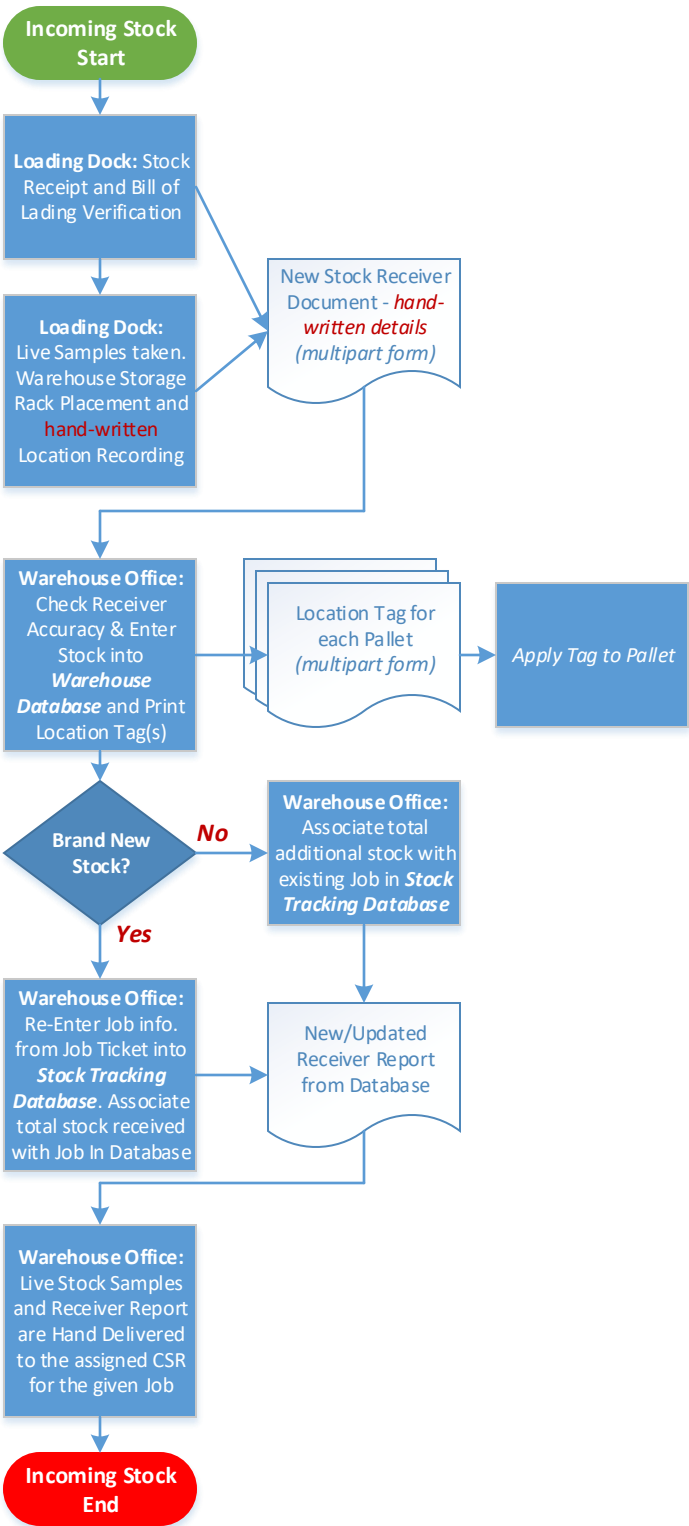
1 As pallets of mail-piece component stock (*Forms, Outer Envelopes, Business Reply Envelopes, Buck-Slips, etc.….*) arrive in the receiving dock area, Warehouse Floor personnel verify the **Bill of Lading** against the physical stock that is delivered. Once verified and accepted, the Bill of Lading item details are **hand-written** on a multi-part **Receiver** Form. This process involves the hand-written transfer of information from the Bill of Lading (which arrive in many different layouts and formats, which vary by carrier). The Bill of Lading is attached to the completed Receiver. An archival PDF scan of the Bill of Lading may provide a helpful reference when tracking down stock delivery and/or quantity issues *(possibly as a result of human error when hand-writing the Bill of Lading details on the Receiver)*.

2 Warehouse Floor personnel take the pallets of accepted stock, as listed on the **Receiver**, and visually search for available storage rack space to store the new pallets. As the pallets are stored, the location code is **hand-written** on the Receiver form. A few **Live Samples** of the component are taken and attached to the Receiver. The random storage of new pallets is inefficient and increases the chance of lost stock. Hand-written location codes are open to human error, which often results in lost stock. A database model of the stock locations, coupled with an automated location assignment mechanism would make the storage of new stock more efficient and less error-prone.

3 Receiver forms (with Bill of Lading and Live Samples attached) are taken by Floor personnel to the Warehouse Office. The Warehouse Office personnel double-check the Receiver for errors. If no errors are found, the received pallet information is entered into the **Warehouse Inventory Database (Microsoft Access 97 -WARESYS.MDB)**. As the pallet information is entered, **Location Tags** are generated to be subsequently attached to the corresponding pallets. Floor personnel often don't bother applying the Location Tags (due to the time and effort involved in going back to the storage location). An automated location assignment and tagging mechanism would make the labeling of stock less labor intensive.

4 For Brand New stock (received for a new client or for a new project), the **Job Ticket** information is *re-keyed* into the **Stock Tracking Database – a.k.a. "New Tracking" (Microsoft Access 97 – TRACKING.MDB)**. The total amount received of a given component is then associated with the Tracking system's internal Job/Project Number. For replenishment of existing stock, the total received amount is added to the available amount and tracking history. The re-keying of Job Ticket information is inefficient and error-prone. The duplication of stock information across two different database systems is also inefficient and error-prone. Consolidating the inventory and tracking data and functions into a single database system would allow for more efficient and accurate tracking of stock details.

5 The Stock Tracking receiver report is attached to the Dock Receiver, along with component samples, and hand-delivered to the proper **Lettershop CSR** in the front Office. The steps that lead up to the CSR getting the final **"Receiver Package"** are currently very cumbersome, time-consuming, and error-prone. More timely, efficient, and accurate, processing of incoming stock aids in providing better overall customer service. Given the lack of comprehensive, modern, stock history management tools, there is a significant amount of "dead" stock that is no longer being used for any mailings. And this stock is wasting valuable storage space. Over the last 20 years, the volume of stock and unique SKU's has increased dramatically. In order to effectively manage inventory, a complete overhaul of the process and tooling is needed.

1 A designated worker from a production department (e.g. Imaging, affixing, Inserting) orders a given component from the Warehouse. This is done by looking up the component in the **Stock Search** system. A report of available stock is then printed. The amount needed is *hand-written* on the report. The Warehouse floor is paged to the department to get the hand-written request. There is no dedicated stock ordering facility available in the Stock Search system. Departments tend to order more (in some cases much more) stock than is actually needed (to avoid having to make another request). Some kind of limitations on orders would reduce the amount of unnecessary overstock handling.

2 The Warehouse floor person takes the request and pulls the requested stock from the Warehouse storage racks. The amount taken from the storage location(s) is hand-written on the request sheet and eventually delivered to the Warehouse office. The Warehouse office personnel then remove the given stock from the **Warehouse Inventory Database**. Relying on the Warehouse floor person the deliver the request sheet to the Warehouse office in a timely manner can be problematic. The hand-written request/pull information is error-prone. Ideally, stock should be taken from any available Overstock first. However, depending on convenience and time savings, Warehouse floor personnel often pull from newer, full pallets. This often results in the fragmenting of inventory. An automated "pick list" system that enforces a stock use policy would reduce the amount of fragmentation and unnecessary overstock handling.

3 The unused stock is returned to the Overstock area for re-entry into inventory. Overstock personnel record the returned stock details (code, amount, etc.) on a hand-written **Overstock Receiver** form. Warehouse floor personnel then take the Overstock pallets (*which may contain multiple components – due to ongoing stock fragmentation*) and finds open storage rack locations for them. The new storage location is *hand-written* on the Overstock Receiver form. A sample of the component is taken and attached to the Overstock Receiver and delivered to the Warehouse office. Warehouse office personnel add the overstock back into the **Warehouse Inventory Database**, so it is available to be pulled again. A modified Job number (with letters) is assigned to the stock, in order to identify it as Overstock. The challenges of managing Overstock are significantly increased by the over-requesting of stock by production departments and the under-use (pulling) of existing Overstock by Warehouse floor personnel. Hand-written stock and location codes are error-prone, often resulting in lost stock. An automated "pick list" system that enforces a stock usage policy would reduce the amount of unnecessary overstock handling. A mechanism for consolidating fragmented stock onto fuller pallets would also be of value. Implementing modern automation tools to streamline the stock usage lifecycle would greatly reduce the problems and ongoing issues currently being dealt with by Warehouse managers and personnel.

Incoming Stock Start

- **Loading Dock:** Stock Receipt and Bill of Lading Verification
  - New Stock Receiver Document - *hand-written details (multipart form)*
- **Loading Dock:** Live Samples taken. Warehouse Storage Rack Placement and **hand-written** Location Recording
- **Warehouse Office:** Check Receiver Accuracy & Enter Stock into **Warehouse Database** and Print Location Tag(s)
  - Location Tag for each Pallet *(multipart form)* → Apply Tag to Pallet
- **Brand New Stock?** — *No* → **Warehouse Office:** Associate total additional stock with existing Job in **Stock Tracking Database** → New/Updated Receiver Report from Database
- *Yes* → **Warehouse Office:** Re-Enter Job info. from Job Ticket into **Stock Tracking Database**. Associate total stock received with Job In Database → New/Updated Receiver Report from Database
- **Warehouse Office:** Live Stock Samples and Receiver Report are Hand Delivered to the assigned CSR for the given Job
- **Incoming Stock End**

Stock Usage Start

- **A Given Production Department:** Print Stock Report from **Warehouse Stock Search Database** App and pages Warehouse
  - Stock Report w/ *hand-written request amount*
- **Warehouse:** Stock Person takes request and pulls Stock from Storage Racks
  - Stock Report updated w/ *hand-written pull amount*
- **Warehouse Office:** Pulled Stock removed from **Warehouse Database**
- **A Given Production Department:** Unused Stock is returned to the Overstock Area
- **Overstock Area:** Fill out a new Overstock Receiver. Warehouse Storage Rack Placement and **hand-written** Location Recording
  - Overstock Receiver Document - *hand-written details (multipart form)*
- **Warehouse Office:** Overstock re-entered into **Warehouse Database** under a modified Job Number (w/ letters)
- **Stock Usage End**