**Shipping/Receiving Daily Tasks**

Start all necessary programs needed for the day: Email, Prophet21, UPS Worldship. Respond to any emails if required – this inbox should be checked regularly throughout the day.

Finish any pick tickets or required work from the previous day. This includes any stock that needs to be put away, cleanup of your area, or any projects started the day before.

Receive all packages that arrive from carriers, you must determine if material being received is for stock or an order by using the “Pick Ticket Report” and “Item Master Inquiry” (F2)

1. After receiving UPS and any other transfers/packages, put the “Pick Ticket Reports” on. This will print out Pick Tickets for any orders that have items allocated (available) and ready to deliver/ship.
2. Using the Pick Tickets that were just printed items can be pulled and set in their designated locations. After laying the pick tickets out on the shipping desk, they can be pulled by importance. This may change from day to day, for example, if a customer is waiting for an item to arrive, you will be informed who and which order it is – please pull and contact- if needed- this order first and then continue in this general order:
   1. Customer Pickup – Top shelf of wooden rack. Read any notes on Pick Tickets, a customer may need to be contacted to pick up their order
   2. Salesrep Will Deliver – Patrick/Ryan M: Bottom shelf wooden rack, John (Oil terminals, Exxon, Irving, Sprague, Buckeye): Middle shelf wooden rack
   3. UPS Ground & Collect – Scale on the shipping desk. This lets everyone know an item needs to be shipped and guarantees one of us will make sure it goes out.
   4. UPS RED/BLUE (Next Day Air & 2ND Day) – Locate, package, and process the item immediately. Put a priority on this order, we do this immediately to ensure we have the correct product in stock and keep our guarantee to the customer
   5. Special Instructions/Best Way – Look for any notes or Delivery Instructions and ask the Taker of the order if more information is needed to determine Best Way

Once all orders have been pulled, the remaining items are most likely stock that can be put away. Keep product rotation in mind, if bins have items in them already, pull the old stock to the front and place the new stock behind it. Please ask about any leftover items that don’t have any area for stock and have no pick ticket.

Clean the shipping area, breakdown any unneeded boxes, inquire about product received that does not have an area for stock and no order for it. If needed, empty trash barrels in the warehouse AND offices.

Check all three printers (shipping, counter, and breakroom) throughout the day for any transfers that other branches have printed.

All UPS orders should be packed and labeled, ready for pickup, before 3:30PM. Once UPS has picked up, run the “End of Day” process on UPS Worldship to send the package information to UPS – this *must* be done daily.

After all of the pick tickets have been pulled/addressed move on to Purchase Order verifying.

1. Go through the Purchase Orders from the bin in the Store, leave all the POs less than 24 hours in the bin. Bring the rest back to your desk.
2. Print *all* the acknowledgements in your inbox. Most vendors will send a PDF attachment containing the acknowledgement, some will only send a message stating the PO was received – in this case, the email itself can be printed out in place of the acknowledgement. Delete the email after printing the acknowledgement
3. Depending on the number of acknowledgements and POs, sometimes it’s easiest to lay out all the acknowledgements across the shipping desk. Go through the stack of Purchase Orders, one by one, and match each Purchase Order with an acknowledgement**. Verify the Purchase Order # is the same on each**, place a check mark on the Purchase order, and staple the acknowledgement behind it.
4. Create a pile of POs that have a acknowledgment *or* that already have a check mark indicating the issuer of the PO knows the vendor has received it. These can all be filed away, sorted by month, in the file cabinet.
5. For all of the Purchase Orders left over, the vendor will have to be called or emailed to verify they received the PO. A vendor’s contact information can be found in the “Purchase Order Entry” module, under the “Vendor” or ”Supplier” tabs. To resend a Purchase Order, scan and email the original.

Editing pick tickets is a process usually done at the end of **every** day using the “Shipping” module. Editing (or Confirming) pick tickets tells the system that the allocated product for an order has been delivered to the customer or picked up and is ready to be invoiced, this is an irreversible process. Each pick ticket will create an invoice for only the items on the pick ticket, you must keep this in mind as some customers will not understand why they have, for example, 10 invoices for a single order – sometimes it will be beneficial to kill (or cancel) pick tickets belonging to one order just to produce a single pick ticket. Pick tickets that are ready to be invoiced will be in the bin outside of the Store entrance. Some things to watch out for while editing:

1. Changes to shipped quantities may be handwritten, this must be entered into P21 to keep inventory and history accurate. When under-shipping (sending less than requested) a backorder is automatically created, to cancel this change the disposition from “B” to “C”
2. Read all notes and instructions on the order, follow any notes pertaining a customer’s requirements for Purchase Order numbers. Don’t confirm any orders with “TBD” (to be determined) or any not following the requested purchase order number format
3. Changes to the carrier

End of day:

* Turn off 4 breakers for the warehouse lights, turn off lights in the store and kitchen, leave the outside night light on.
* Turn off heaters in warehouse and climate control in the store.
* If any hydrostatic testing was done that day, verify all water valves are closed and tester is disconnected.
* Lock both sides of garage door, lock the dumpsters, lock the front door.