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## CHAPTER 43 - PALLET TRACKING

### Introduction

Pallet Tracking allows the system to track physical pallets in and out of a facility by pallet type and customer.

If Pallet Tracking is enabled for the customer, the Pallet Tracking tab on the Load screen will be used to record the net increase or decrease in pallets caused by the receipt or shipment of the load. This is required at load close. Any necessary adjustments to the Pallet Inventory can be made using the Pallet Inventory Adjustments screen. Totals for each type of pallet can be viewed in the Pallet Inventory Total screen while the history of pallet transactions is available in the Pallet Inventory History screen. In addition, three reports are available.

### Setting up a Customer

Pallet Tracking entries are required before a load can be closed if the Pallet Tracking option has been checked during Customer setup. The customer setup screen can be accessed by selecting Setup/Customer/Customer Maintenance. Place a check mark in the Track Pallets box to enable Pallet Tracking for the customer.

**Customer BP-Better Pets**

Customer ID: **BP** Status: **Active** Clone Rates Groups Items

Name: **Better Pets** Phone: **800-777-5674** Consumables Owner: **AGG**

Lookup: **BP** FAX:

Contact: **Pattie Johnson** E-Mail: **sally.winchell@zethcon.com**

Address: **1234 W Washington** Primary CSR: **Jeff Jones**

City: **Indianapolis** State/Province: **IN**

Postal Code: **45644** Country: **USA**

Master Account:  Manufacturer UCC Code:  Recent Order Days:  Min O-Qty Weight:

☒ Track Pallets ☒ Collect Pro Numbers ☐ Allow Pick Passing

☐ Bill For Pallets Duplicate Order Reference Allowed: **Yes** ☐ No ☐ Warn ☐ Hold

Unique Order Identifier: **Reference** ☐ Reference and PO

Reduce Order Qty By Cancel Amount: **Default** ☐ Yes ☐ No

☐ Use Expanded WebSynapse fields

☐ Suppress Anniversary Date ☐ Require Cycle Count Item

☐ Aggregate Inventory ☒ Require Cycle Count Lot

☐ Use Labels ☐ Require Physical Inventory Item

☐ Allow Extra Picking ☒ Require Physical Inventory Lot

☐ Allow Load Assignment

Additional Contacts

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### Customer Default Setting

The customer field will be pre-filled on the pallet tracking tab of the load screen if there is only one customer associated with the load based on the defaults set up in the Pallet Tracking Defaults area of the Setup/Customer/Shipping/Options – 2 screen.

Default quantity for the customer must be > 0, for the Generate Default Quantities Button to be illuminated on the load screen.

**Customer BP-Better Pets**

Wave Template for Imported Orders:

☐ Reject short orders and allow resubmission ☐ Line Number Processing ☐ Pick by Line Number

Order Confirmation Export Format:

Reject Notification Export Format:

CHEP Sender ID:

Consolidated Waves Template Defaults

☐ Consolidate Orders

Shipment Type:

Carrier:

Pallet Tracking Defaults

Default Quantity: 1

Default Pallet Type: **CHEP**

Assign Stop By Passthru

☐ Auto Assign Stop

Load Field:

Stop Field:

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## Load/Load Info

From the Load screen,

**Load 200824**

Load Info | Comments | Summary | Pallet Tracking | Pro Numbers | Add Info | Load Tracking

Load: 200824

Carrier: ETW2T

Trailer: DR13

Stage Location:

Appointment Date/Time:

Type: OutCustomer

Bill of Lading:

Seal:

Door Location:

Shipment Type:

Receipt Date/Time:

Pro Number:

Shipment Terms:

Late Shipment Reason:

Status: Full Release

Status by: SWINCHELL

Status Update: 11/22/2011 2:45:23

View Stops | Close | Arrive | View Plates | Move From Door

Cancel Load | Print COA | Apply Pro No. to Orders

Cancelled | Variance | Hazardous | HOT

Order	Shipment	Stop Status	Stop Stage Loc.	Order ID	Ship ID	Order Status	Customer ID	Order Qty.	Rcvd. Qty.	Ship Qty.	To Facility	Order Ship To	From Facility	Stop Ship To	Order Type	PO	Weight Ship - U
1	1	Full Release		368467	1	Picked	BP	1	0	0	00001SAN	ZET			Outbound		

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Click on the Pallet Tracking tab.

The screen will display as follows:

**Load 200824**

Load Info Comments Summary **Pallet Tracking** Pro Numbers Add Info Load Tracking

Customer: Order ID: Ship ID: Pallet Type: In: Out:

Customer ID	Facility	Pallet Type	Adj. Reason	Load Number	IN Pallets	OUT Pallets	Last User	Last Update	Order ID	Ship ID	Carrier

Orders Stops

Stop	Shipment	Stop Status	Stop Stage Loc.	Order ID	ShipID	Order Status	Customer ID	Order Qty.	Rcvd. Qty.	Ship Qty.	To Facility	Order Ship To	From Facility	Stop Ship To	Order Type	PO	Weight Ship - U
1	1	Full Release		368467	1	Picked	BP	1	0	0	00001SAN	ZET			Outbound		

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## Load/Pallet Tracking

**Load 200824**

Load Info Comments Summary **Pallet Tracking** Pro Numbers Add Info Load Tracking


Customer: Order ID: Ship ID: Pallet Type: In: Out:

Customer ID	Facility	Pallet Type	Adj. Reason	Load Number	IN Pallets	OUT Pallets	Last User	Last Update	Order ID	Ship ID	Carrier
BP	ZET	WOOD	Outbound	200824	0	1	JSTANCYK	9/25/2013 10:40:26 F	368467	1	3WAY

Orders Stops

Stop	Shipment	Stop Status	Stop Stage Loc.	Order ID	ShipID	Order Status	Customer ID	Order Qty.	Rcvd. Qty.	Ship Qty.	To Facility	Order Ship To	From Facility	Stop Ship To	Order Type	PO	Weight Ship - U
1	1	Full Release		368467	1	Picked	BP	1	0	0	00001SAN	ZET			Outbound		

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The user can add a new entry to the Pallet Tracking grid by clicking on the add  button, and selecting the Customer, Pallet Type and Order ID, and Ship ID from the pull-down lists. The user must fill in a Count in either or both the In or Out fields (any positive integer including zero) before approving the record with a check mark.

- If receiving pallets, enter the number of pallets received in the "In" field. This will increase the number of pallets in inventory.
- If shipping pallets, enter the number of pallets being shipped in the "Out" field. This will decrease the pallet inventory.

**NOTE:** Entries to pallet tracking can only be added if the Load has not been closed and the Track Pallets option has been enabled for the customer.

Default quantity for the customer must be > 0, for the Generate Default Quantities Button to be illuminated on the load screen.

## Pallet Inventory

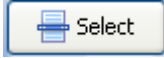
There are several screens used to look up or adjust pallet inventory information.

From the Lookup menu, select Pallet Inventory Total.

The screen will display as follows:

## Lookup/Pallet Inventory Totals

To view pallet inventory information, enter a Facility and Customer ID. To limit the amount of information, you can specify one or more Pallet Type(s) and whether they should be included or excluded. To select pallet type(s), double click in the Pallet Type field to view the list. Double click on each pallet type to be included/excluded. They will

be highlighted in green to show your selection(s). Click on the  button to carry the information over to the Pallet Inventory Totals screen.

The screen will display as follows:

**Pallet Inventory Totals**

Facility: ZET Customer ID:

Pallet Type: ☒ Include ☐ Exclude CHEP,WOOD

Facility	Cust ID	Pallet Type	Pallet Count

Facility	Customer	Pallet Type	Adj Reason	Load No	Carrier	Order ID	Ship ID	In Pallets	Out Pallets	Last Updated

**NOTE:** If selecting multiple pallets to be included/excluded, you will notice separating commas as seen in the above example.



Once the appropriate information is entered, click on the search button to display the information.

The screen will display as follows:

**Pallet Inventory Totals**

Facility: ZET Customer ID: BP

Pallet Type: ☒ Include ☐ Exclude CHEP,WOOD

Facility	Cust ID	Pallet Type	Pallet Count
ZET	BP	( TOTAL )	13
ZET	BP	CHEP	1
ZET	BP	WOOD	12

Facility	Customer	Pallet Type	Adj Reason	Load No	Carrier	Order ID	Ship ID	In Pallets	Out Pallets	Last Updated
ZET	BP	WOOD	Outbound	200824	3WAY	368467		1	0	1 9/25/2013 10:40:26 F
ZET	BP	CHEP	Outbound	200984	905L	368854		1	0	0 11/1/2011 10:54:56 F
ZET	BP	CHEP	Outbound	201042	905C	369028		1	0	0 12/20/2011 4:07:51 F
ZET	BP	CHEP	Inbound	201058	3WAY	369078		1	1	0 1/12/2012 5:47:49 PM
ZET	BP	CHEP	Inbound	201085	3WAY	369130		1	1	0 1/26/2012 4:05:48 PM
ZET	BP	CHEP	Inbound	201085	3WAY	369130		1	0	0 1/26/2012 3:51:15 PM
ZET	BP	CHEP	Outbound	201113	3WAY	369179		1	0	1 2/15/2012 11:00:07 F
ZET	BP	CHEP	Inbound	200997	AANM	368819		2	0	0 11/14/2011 3:52:01 F
ZET	BP	CHEP	Outbound	201022	3WAY	368976		1	0	0 11/22/2011 4:43:35 F
ZET	BP	CHEP	Outbound	201093	3WAY	369152		1	0	1 2/2/2012 3:15:51 PM
ZET	BP	CHEP	Inbound	200931	A&I	368692		1	1	0 3/19/2012 11:19:09 F
ZET	BP	CHEP	Outbound	201152	3WAY	369342		1	0	1 3/22/2012 10:46:04 F
ZET	BP	WOOD	Outbound	200822	4SEA	368457		1	0	0 11/2/2011 1:05:41 PM
ZET	BP	CHEP	XX						1	0 11/10/2011 2:31:35 F

**NOTE:** This screen is also providing pallet history information specific to the customer in the lower white grid area.

## Pallet Inventory Adjustments

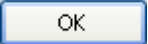
If necessary, pallet inventory can be adjusted.

To make an adjustment, double click on one of the pallet entries in the Pallets Inventory Total screen (located in the upper white grid).

The following screen will appear:

The screenshot shows a dialog box titled "Pallet Inventory Adjustment" with a blue header and a red close button. The form contains the following fields and controls:

- Facility:** A dropdown menu with "ZET" selected.
- Customer ID:** A text field containing "BP".
- Pallet Type:** A dropdown menu with "WOOD" selected.
- Order ID:** An empty text field.
- Ship ID:** An empty text field.
- Carrier:** An empty text field.
- Current Balance:** A text field containing "12".
- Adjustment Amount:** Two text fields labeled "In" and "Out", both containing "0".
- Adjustment Reason:** A dropdown menu.
- Comment:** A large text area.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

Enter an adjustment amount to the appropriate In or Out field, select an Adjustment Reason from the pull-down list, and type an optional comment. If you want to associate the adjustment to a specific order, you must enter the Order ID. Click on the  button to save the adjustment information.

**NOTE:** Entering Order ID information will automatically fill in the Carrier and Ship ID Fields once the information has been saved.

## Pallet History

This screen is used to view Pallet History. From the Lookup menu, select Pallet History.

The screen will appear as follows:



**Pallet History**

Pallet History

Facility: ZET Customer ID: BP

Pallet Type: WOOD Load Number: 201141

Adjustment Reason: OUTBOUND Order ID: 368851 Ship ID: 1

Carrier: AACT Incoming Pallets: 0 Outgoing Pallets: 1

Comment:

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## Lookup/Pallet Inventory History

The use of the arrows will allow inspection of each transaction affecting the Pallet History. Entries with a blank load number are the result of Pallet Inventory Adjustments.

**NOTE:** Detailed pallet history information can be viewed by using the Pallet Inventory Total screen or a report can be requested.

## Reports

Three Pallet History transaction reports are available:

- Carrier Report (PltTrkCarr)
- Consignee Report (PltTrkCons)
- Customer Report (PltTrkCust)

From the main menu, select Requests/Report Requests. Select the appropriate report.

The parameters/tabs requested are the subject of the report, (i.e. Customer ID, and the beginning and ending dates.



NOTE: The dates default to today's date.

## Pallet Tracking Printed Report Samples

### Carrier Report (PltTrkCarr)

Carrier Pallet Report							
Zethcon Test							
Printed on 9/25/2013 10:53PM							
Summary from 9/25/2012 to 9/25/2013							
Carrier 3WAY - 3WAY TRANSPORT							
Date	Reason	Customer	Consignee	Load	Order ID	Reference	Amount
<b>DMJ Donna J</b>							
<b>CHEP</b>							
<b>Chep Pallet</b>							
9/23/2013	Outbound	0206	0002	201593	370146-1	TEST DOOR 04	-1
<b>CHEP</b>							
<b>Beginning Balance:</b>							
<b>Ending Balance:</b>							
<b>PLASTIC</b>							
<b>Formed Plastic Pallet</b>							
9/23/2013	Outbound	0206	0002	201593	370146-1	TEST DOOR 04	-1
<b>PLASTIC</b>							
<b>Beginning Balance:</b>							
<b>Ending Balance:</b>							
<b>ZET Zethcon Corporation</b>							
<b>BALLOUG</b>							
<b>Ballogh Smart Pallet</b>							
7/17/2013	XX	BP	00001BOD		369003-1	CON	2
<b>Misc</b>							
12/10/2012	Outbound	BP	0003	201249	369525-1		0
<b>BALLOUG</b>							
<b>Beginning Balance:</b>							
<b>Ending Balance:</b>							
<b>WOOD</b>							
<b>Wooden Pallet</b>							
9/25/2013	Outbound	BP	0246145	200824	368467-1	TEST CON	-1
8/13/2013	Outbound	AGCALJAM		201604	368477-1	PALLET	0
<b>Ship Order</b>							
<b>WOOD</b>							
<b>Beginning Balance:</b>							
<b>Ending Balance:</b>							

## Consignee Report (PltTrkCons)

## Consignee Pallet Report

Zethcon Test

Printed on 9/25/2013 11:00PM

Summary from 9/25/2012 to 9/25/2013

SYNAPSE

Consignee: 0002 - Bay Harbor

Date	Reason	Customer	Carrier	Load	Order ID	Reference	Amount
DMJ	Donna J						
	CHEP						
9/23/2013	Chep Pallet						Beginning Balance: 0
	Outbound	0206	3WAY	201593	370146-1	TEST DOOR 04	-1
	CHEP						Ending Balance: -1
	PLASTIC						
	Formed Plastic Pallet						Beginning Balance: 0
9/23/2013	Outbound	0206	3WAY	201593	370146-1	TEST DOOR 04	-1
	PLASTIC						Ending Balance: -1


## Customer Report (PltTrkCust)

# Customer Pallet Report

Zethcon Test

Printed on 9/25/2013 11:03PM

Summary from 9/25/2012 to 9/25/2013



## Additional Notes

If CHEP pallet EDI processing is needed, please contact the Zethcon TSD desk for additional information.

To allow flexibility, the "REQUIREPALLETTRACKQTY" system default value exists. SYNAPSE will not require a pallet tracking quantity entry > 0 unless the "REQUIREPALLETTRACKQTY" system default value is set to a "Y".

The “Bill for Pallets” check box on the Customer Maintenance Screen is for informational purposes only. It is not tied to Synapse Billing.