CHAPTER 43 - PALLET TRACKING 2

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 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.

Load/Load Info

From the Load screen,

Click on the Pallet Tracking tab.

The screen will display as follows:

Load/Pallet Tracking

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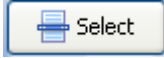
There are several screens used to look up or adjust pallet inventory information.

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 [Select] button to carry the information over to the Pallet Inventory Totals screen.

The screen will display as follows:

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:

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

Pallet Inventory Adjustments
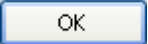
If necessary, pallet inventory can be adjusted.

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:

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 OK 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:

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

SYNAPSE

Carrier 3WAY - 3WAY TRANSPORT

Date	Reason	Customer	Consignee	Load	Order ID	Reference	Amount
DMJ	**Donna J**						
CHEP	**Chep Pallet**				Beginning Balance:		0
9/23/2013	Outbound	0206	0002	201593	370146-1	TEST DOOR 04	-1
	CHEP				Ending Balance:		-1
PLASTIC	**Formed Plastic Pallet**				Beginning Balance:		0
9/23/2013	Outbound	0206	0002	201593	370146-1	TEST DOOR 04	-1
	PLASTIC				Ending Balance:		-1
ZET	**Zethcon Corporation**						
BALLOUG	**Ballough Smart Pallet**				Beginning Balance:		-2
7/17/2013	XX	BP	00001BOD		369003-1	CON	2
Misc							
12/10/2012	Outbound	BP	0003	201249	369525-1		0
	BALLOUG				Ending Balance:		-2
WOOD	**Wooden Pallet**				Beginning Balance:		2
9/25/2013	Outbound	BP	0246145	200824	368467-1	TEST CON	-1
8/13/2013	Outbound	AGCALJAM		201604	368477-1	PALLET	0
Ship Order							
	WOOD				Ending Balance:		2

Consignee Report (PltTrkCons)

Consignee Pallet Report
Zethcon Test
Printed on 9/25/2013 11:00PM

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

Consignee: 0002 - Bay Harbor

Date	Reason	Customer	Carrier	Load	Order ID	Reference	Amount
DMJ	**Donna J**						
CHEP	**Chep Pallet**				Beginning Balance:		0
9/23/2013	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)

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.