Warehouse 100

# Objective:

This course will cover two subjects and has been designed from a warehouse employee’s point of view pertaining to customer sales orders. This course will discuss order header details and sales order elements pertaining to the warehouse role and needs. Instruction will also include options for printing labels and packing lists.

Along with the sales order instruction, there will be an overview of the IWMS program. This overview will instruct users how to use IWMS Task Queue Manager, Outbound Dock Doors, and Operator Panel.

# Pre-Reading:

* Order Elements & Headers
* Customer Profiles
* Label Printer ID’s

# Order Elements:

* Show elements of sales order
	+ Operator Initials
	+ Warehouse
	+ Ship Via
	+ Weights: Per Line & Total Weight
	+ Cash/COD/Credit Hold Notifications on sales order
	+ Available Options/Notepad
	+ Order Statuses
	+ Message lines overview
* Recognizing Owner of Ticket
* Navigate to Menu/Links
	+ Point to Operators Initials
	+ Note “!!” Initial Type for Décor Orders
* Open Notepad (Décor orders)
	+ Show first page
* Point to Message lines (Décor orders)
	+ OP by Message
* Cash/COD/Credit Hold Notifications on Sales Order
	+ Discuss Balance Due policies for Cash & COD customers
	+ Discuss Credit Hold
		- Sending back to CSR if conditions aren’t met
* Message Lines Overview
	+ W\* prefix indicates a note to the warehouse
* Notepad Overview
	+ Navigating to recent notes
	+ System Notes
	+ Manual Notes
	+ Searching Notepad

## Printing Labels – Needs confirmation

\*PowerPoint Support\*

1. Picking Labels for WC
	1. Printed from Navigator, Using Pick label pool under Available options
	2. Note labels available for print are shown and can be selected
	3. Explain why labels wouldn’t be available for print
		* Credit Hold: labels won’t be available for print, need to contact CSR to contact accounting for release.
		* Labels not displaying under pick label pool (reasons):
			1. If Label is already printed
			2. If order is marked ship complete and all items aren’t received
				+ Show Transaction history to find, select & re-print
				+ **Note Transfer to Labels should not be printed from label pool**
2. Truck run (OT) labels are printed from IWMS
	1. Warehouse Selection & Date Range (1 year back/1 day forward, or day of delivery)
	2. Menu selection: Truck Run Deliveries/Louisville Truck run for Bishop
	3. Labels will show available once product is in an available status on order
	4. Columns are sortable – sort by account # for example
	5. Select labels to print (per order#, account #, etc.)
	6. Labels will not show for orders that are marked “ship complete” until all material is available.

# IWMS – Review

* Task Queue Manager Review
	+ How to navigate back to Filters vs. going out to Main Menu
	+ Warehouse Selection & Date Fields
	+ Reviewing X&L Statuses
* Status Process
	+ (L – X – S)
* Explanation of Importance
	+ Truck Runs (warehouse/date range)
		- Back 1 year/Forward 1 day (or day of delivery)
	+ Transfer Labels (warehouse/date range)
		- Back 1 year/Forward 2 weeks
	+ Orders by Ship Via
* Assign Outbound Dock Doors
	+ Date range: 1 year back/1 day forward
	+ Review Graph & Breakdown Details
		- Weight
		- Completion %
	+ Note Staged
		- Transfer = 1 status on order
		- Assembled/Deliver = A status on order
* Operator’s Panel
	+ Sending a Message to Scanner

# Follow-Up Reading:

* Sending a message to Scanner
* Partial Print & Distribution
* UPS Notification/Branded Tracking Process