# Advanced Customer Order Fulfillment for XA

## *Improving Your Customer Service while Gaining Operational Efficiencies!*

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# Today's Agenda

✓Improving Customer Satisfaction

✓Gaining Operational Efficiencies

✓Process flow using Advanced Order Fulfillment

    ✓Customer Order priority

    ✓Quick Pick

    ✓Pack / Ship

    ✓Customer Service enhancements

✓Q & A

# Customer Expectations

- Your customers expect:
  - Order Accuracy – must ship the right product every time
  - Speed – they don't carry inventory, expect you to deliver fast (e.g. spare parts for machines)
  - On time delivery – they want to know when it's going to be delivered and expect you to meet the date
  - Accurate documentation – ASNs, Shipping documentation, Export Documentation
  - Real time information – tell me where my order is!

# Minimal Expectations from Customers

*Line items shipped complete > 95%*

*Accuracy – 99%*

*On time Arrival > 90%*

*Order Cycle Time – 3 to 5 days*

Source: Dr. Edmond Schuster, MIT Center for Transportation Studies

How do you "*Exceed* Customer Expectations"?

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# Your Challenge

*Exceed* customer expectations

AND

optimize internal operational efficiencies

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# XA COM Standard Features

- Not adequate for today's customer demands
  - No interface to customer
  - Paper driven system takes longer to process
  - Manual system is prone to shipment errors
  - Transaction oriented and labor intensive
    - Containerization process is difficult
  - No real time transaction processing

# Advanced Customer Order Fulfillment for XA

**YOUR CUSTOMER**

**COM ORDER –
VIA EDI, PHONE, FAX, WEB**

**OPTIONAL: ASSIGN PRIORITY TO ORDERS**

**ELECTRONIC PICK LIST RELEASED TO DEVICE(S)**

**PICK / SCAN / VERIFY VIA DEVICE**

**ASN AND/OR E-MAILTO CUSTOMER**

**ACCESS TO ORDER STATUS VIA PORTAL**

**SHIP VIA UPS/FEDEX/LTL INTERFACE**

**OPTIONAL: PACK BOXES/CONTAINERS**

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# Advanced Customer Order Management For XA

Automates, streamlines and error proofs order fulfillment via:

- Order visibility
  - Immediately push electronic customer orders to the warehouse floor
- Picking
  - Real time directed picking via portable devices
- Packing
  - Create boxes, pallets, trucks, etc. via portable RF devices
- Shipping
  - Interfaces to UPS/FedEx + improved interface for LTL shipments
- ASN/Export Document creation
  - Easily created from packing information – EDI interface to Electronic Commerce to create ASN
- Customer Shipment + Portal
  - e-mail customer when shipment occurs AND allow customer access to order status via on-line Customer Portal

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# Device Requirements

- Indifferent to type or brand of hardware
  - What works best for your space and environment
  - Consider use of carts, forklifts, packing centers, etc.
  - Consider costs
- Can implement using traditional handheld text (via 5250) or via graphical interface
- Wireless network required

# PC Tablet or iPad w/ Bluetooth Scanner



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**Rafael Antonio Vasquez - Whs 1 Stage SHIP**

Pick Item Selection

| Pick | All Items | Return |

| Select | Item | PickLst | Loc | Qty Rqrd | Qty Picked | To be Picked | Cases | Skids | Ttl Weight | Cntr Type/ Number |
|--------|------|---------|-----|----------|-----------|--------------|-------|-------|-----------|-------------------|
| Select | **EBN160** <br> 1' NAIL GUN CASE 3 PCK | 855230 | DFLT1 | 54.000 | Quantity Picked | 54.000 | 18.0 | .5 | 342.900 | PAL |
| Select | **ETFX50D** <br> P-ELECT50 TACK&BRAD 3 PCK | 855230 | A0690 | 69.000 | | 69.000 | 23.0 | .4 | 259.440 | PAL |
| Select | **HTX50** <br> HAMMER TACKER NEW HANDLE | 855230 | A0340 | 44.000 | | 44.000 | 11.0 | .2 | 102.520 | PAL |
| Select | **JT27** <br> LIGHT DUTY STAPLE GUN JT21 STP | 855230 | A0020 | 264.000 | | 264.000 | 11.0 | .3 | 293.832 | PAL |
| Select | **MG24-4** <br> 4"ALL PURP GLUE 24STX4PK | 855230 | E0090 | 240.000 | | 240.000 | 10.0 | .1 | 57.840 | PAL |
| Select | **MT300** <br> MINI GLUE GUN | 855230 | A0530 | 240.000 | | 240.000 | 20.0 | .4 | 120.000 | PAL |
| Select | **RHT300** <br> SWIVEL HEAD RIVET TOOL | 855230 | DFLT1 | 96.000 | | 96.000 | 8.0 | .3 | 168.000 | PAL |
| Select | **RH200S** <br> PROF RIVET TOOL | 855230 | A0030 | 132.000 | | 132.000 | 11.0 | .3 | 199.320 | PAL |
| | **RK6120** | | | | | | | | | |

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# RF Handheld Device & Powerlink (supervisory functions)

## YOUR CUSTOMER

**COM ORDER –
VIA EDI, PHONE, FAX, WEB**

# Customer Orders

- Solution is built specifically for XA COM
  - Manual COM Orders
  - EDI Orders
  - Off Line Orders
  - COM_Net Orders

## YOUR CUSTOMER

COM ORDER –
VIA EDI, PHONE, FAX, WEB

OPTIONAL: ASSIGN
PRIORITY TO ORDERS

# Assigning Order Priority

- Supervisor/Manager can (optionally) assign:
  - Order Priority – "Hot Items" show up first
  - Employees – Pick lists will only show up on specified employees' device

  *Real time pick list queue is available to devices*

**YOUR CUSTOMER**

↓

**COM ORDER –
VIA EDI, PHONE, FAX, WEB**

↓

**OPTIONAL: ASSIGN
PRIORITY TO ORDERS**

↓

**ELECTRONIC  PICK LIST
RELEASED TO DEVICE(S)**

# Pickers Screen as it appears on IPAD

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**Rafael Antonio Vasquez - Whs 1 Stage SHIP**    **Picklist Selection**

List of picklist sequence by priority.

Print: **Select Report**    **Pick**    **Pack Verify**

| Select | Prty | PickLst | Customer | Carrier | Ship To | Stage | Date | # of Items | Ttl Units | Cases | Skids |
|--------|------|---------|----------|---------|---------|-------|------|-----------|-----------|-------|-------|
| Select | 1 | 855281 | SEARS WHSE 6282 | PICK UP | COLUMBUS, OH USA | SHIP | 12/06/11 | 3 | 260 | 52 | 1 |
| Select | 1 | 855369 | ACE HDWE-HYP | | OAK BROOK, IL USA | SHIP | 01/20/12 | 2 | 2000 | 93 | 4 |
| Select | 1 | 855370 | ACE HDWE-HYP | | OAK BROOK, IL USA | SHIP | 01/23/12 | 2 | 2000 | 93 | 4 |
| Select | 2 | 855138 | BTL DISTRIBUTORS | PICK UP | MONSEY, NY USA | SHIP | 11/30/11 | 18 | 1092 | 22 | 1 |
| Select | 2 | 855156 | MENARDS INC EAU CLAIRE DC | ROADWAY EXPRESS | EAU CLAIRE, WI USA | SHIP | 12/09/11 | 15 | 2944 | 168 | 2 |
| Select | 3 | 855328 | DO IT BEST CORP. 1C | ROADWAY EXPRESS | CAPE GIRARDEAU, MO USA | SHIP | 12/09/11 | 24 | 2450 | 93 | 1 |
| Select | 5 | 855227 | LOWES #0962 RDC | UNITED PARCEL SERVICE | VALDOSTA, GA USA | SHIP | 12/06/11 | 41 | 20631 | 1056 | 13 |
| Select | 5 | 855158 | MENARDS 9001 | ROADWAY EXPRESS | PLANO, IL USA | SHIP | 12/09/11 | 17 | 4075 | 238 | 3 |

Verified Pick in Green

Picks in blue are active

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Picklist in Dark Green are assigned directly to the individual

NOTES:

**Color code:**
White - Pick Lists not started
Blue - Pick Lists with some activity
Green - Verified Picklists
Yellow - Highlight for Selected Orders
Dark Green - Pick List is assigned to current employee

Done    Internet    100%

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# Pickers Screen as it appears on IPAD

**Rafael Antonio Vasquez - Whs 1 Stage SHIP**

Picklist Selection

Print options for documents or labels →

Print: Select Report

- Select Report
- Pro Forma Pack List
- Pro Forma Cntr Pack List
- Pick List

**Pick**     **Pack Verify**

Select picklist Line is highlighted In yellow →

| Select | Prty | PickLst | | | Ship To | Stage | Date | # of Items | Ttl Units | Cases | Skids |
|--------|------|---------|---|---|---------|-------|------|------------|-----------|-------|-------|
| Select | 1 | 855281 | | P | COLUMBUS, OH USA | SHIP | 12/06/11 | 3 | 260 | 52 | 1 |
| Select | 1 | 855369 | | | OAK BROOK, IL USA | SHIP | 01/20/12 | 2 | 2000 | 93 | 4 |
| Select | 1 | 855370 | ACE HDWE-HYP | | OAK BROOK, IL USA | SHIP | 01/23/12 | 2 | 2000 | 93 | 4 |
| Select | 2 | 855138 | BTL DISTRIBUTORS | PICK UP | MONSEY, NY USA | SHIP | 11/30/11 | 18 | 1092 | 22 | 1 |
| Select | 2 | 855156 | MENARDS INC EAU CLAIRE DC | ROADWAY EXPRESS | EAU CLAIRE, WI USA | SHIP | 12/09/11 | 15 | 2944 | 168 | 2 |
| Select | 3 | 855328 | DO IT BEST CORP. 1C | ROADWAY EXPRESS | CAPE GIRARDEAU, MO USA | SHIP | 12/09/11 | 24 | 2450 | 93 | 1 |
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Internet     100%

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**COM ORDER –
VIA EDI, PHONE, FAX, WEB**

**OPTIONAL: ASSIGN
PRIORITY TO ORDERS**

**ELECTRONIC PICK LIST
RELEASED TO DEVICE(S)**

**PICK / SCAN / VERIFY VIA
DEVICE**

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# Picklist is selected and line items to pick are displayed.

**Rafael Antonio Vasquez - Whs 1 Stage SHIP**

**Pick Item Selection**

[ Pick ]  [ All Items ]  [ Return ]

Touch select button
For item to pick – line
Highlights in yellow

| Select | Item | PickLst | Loc | Qty Rqrd | Qty Picked | To be Picked | Cases | Skids | Ttl Weight | Cntr Type/ Number |
|---|---|---|---|---|---|---|---|---|---|---|
| | CASE 3 PCK | 855230 | DFLT1 | 54.000 | Quantity Picked | 54.000 | 18.0 | .5 | 342.900 | PAL |
| | ACK&BRAD 3 PCK | 855230 | A0690 | 69.000 | | 69.000 | 23.0 | .4 | 259.440 | PAL |
| Select | HAMMER TACKER NEW HANDLE | 855230 | A0340 | 44.000 | | 44.000 | 11.0 | .2 | 102.520 | PAL |
| Select | JT27 LIGHT DUTY STAPLE GUN JT21 STP | 855230 | A0020 | 264.000 | | 264.000 | 11.0 | .3 | 293.832 | PAL |
| Select | MG24-4 4"ALL PURP GLUE 24STX4PK | 855230 | E0090 | 240.000 | | 240.000 | 10.0 | .1 | 57.840 | PAL |
| Select | MT300 MINI GLUE GUN | 855230 | A0530 | 240.000 | | 240.000 | 20.0 | .4 | 120.000 | PAL |
| Select | RHT300 SWIVEL HEAD RIVET TOOL | 855230 | DFLT1 | 96.000 | | 96.000 | 8.0 | .3 | 168.000 | PAL |
| Select | RH200S PROF RIVET TOOL | 855230 | A0030 | | | 2.000 | 11.0 | .3 | 199.320 | PAL |
| | RK6120 | | | | | | | | | |

Click on location
And POP-UP appears
for all locations &
quantities

**Pick Item is displayed with the location of where to Pick the item From**

**Rafael Antonio Vasquez - Whs 1 Stage SHIP**

Pick

Item: **EBN160**
Desc: **1' NAIL GUN CASE 3 PCK**

Whs: **1**
Rqd Qty: **54.000**

Return

Scan Item and Location for verification

| | |
|---|---|
| Stage Location: | **SHIP** |
| Container: | **BOX 000585086** |
| Item: | **EBN160** |
| Location: | **DFLT1** |
| Quantity Picked: | 54 |

Focus    Submit    Container

| 7 | 8 | 9 |
|---|---|---|
| 4 | 5 | 6 |
| 1 | 2 | 3 |
| C | 0 | - |

# Pick item Selection Screen – Items Picked Short Show in GOLD

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**Pick Item Selection**

Line short can be selected again to pick complete

| | Pick | | Open to Pick | | Return | |

| Select | Item ⤢ | PickLst ⤢ | Loc ⤢ | Qty Rqrd ⤢ | Qty Picked ⤢ | To be Picked ⤢ | Cases | Skids | Ttl Weight ⤢ | Cntr Type/ Number ⤢ |
|--------|--------|-----------|--------|-------------|--------------|----------------|-------|-------|--------------|---------------------|
| Select | **AP10-4** 10" ALL PURPOSE GLUE 4PK | 855230 | E0040 | 312.000 | 312.000 | | 13.0 | .2 | 203.112 | PAL 000585082 |
| Select | **BAP5-4C** BAP5 GLUE IN CLAM | 855230 | E0070 | 208.000 | 208.000 | | 13.0 | .2 | 124.800 | PAL 000585083 |
| Select | **BN1810** BRAD NAILS 5/8 INCH BROWN | 855230 | A0650 | 240.000 | 240.000 | | 6.0 | .1 | 42.000 | PAL 000585082 |
| Select | **BSS6-4C** BSS6 GLUE IN CLAM | 855230 | E055A | 192.000 | 192.000 | | 12.0 | .1 | 115.200 | PAL 000585083 |
| Select | **EBN160** 1' NAIL GUN CASE 3 PCK | 855230 | DFLT1 | 54.000 | 54.000 | | 18.0 | .5 | 342.900 | BOX 000585086 |
| Select | **ETFX50D** P-ELECT50 TACK&BRAD 3 PCK | 855230 | A0690 | 69.000 | | 69.000 | 23.0 | .4 | 259.440 | PAL |
| Select | **HTX50** HAMMER TACKER NEW HANDLE | 855230 | A0340 | 44.000 | | 44.000 | 11.0 | .2 | 102.520 | PAL |
| Select | **JT27** LIGHT DUTY STAPLE GUN JT21 STP | 855230 | A | | | | | | | |
| | **MG24-4** | | | | | | | | | |

Items marked COMPLETE but picked SHORT Show in GOLD Color

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**YOUR CUSTOMER**

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PRIORITY TO ORDERS**

**ELECTRONIC PICK LIST
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**PICK / SCAN / VERIFY VIA
DEVICE**

**OPTIONAL: PACK
BOXES/CONTAINERS**



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# XA Containerization

- Before Advanced Customer Order Fulfillment the only option was XA Containerization
  - Limited capabilities
  - Difficult to pack and unpack containers
  - No RF Support
  - Requires a significant amount of manual entry at time of shipment

**XA Containerization is <u>not</u> required for Advanced Customer Order Fulfillment!**

# Packing Benefits

*For customers requiring shipment detail for EDI and Export Documentation:*

✓ Reduction in ASN and Export Documentation errors
  - ✓ Reduce customer 'charge backs' resulting from ASN errors
  - ✓ No issues with stop at border
✓ Efficiency gains in picking and packing
  - ✓ Pick and pack at the same time
  - ✓ Pick and then pack
✓ Efficiency gains in shipping
  - ✓ Electronically build boxes, pallets, trucks as you pick/pack
  - ✓ No manual entry into EDI systems
  - ✓ No manual entry into export documentation systems

# Pack items into boxes





• Bar coded label with container number, CO, customer PO
• Can print packing list per box
• Items can come straight from shelf location (pack while picking) or from staging location (pick, stage then pack)

# Pack Boxes onto Pallet

• Pack boxes (Item Container) onto Pallets (Holding Container)
•Generate label and packing list for each Pallet
•Uses XA files for dimensions, tare weights, etc.

# Pallets into Trucks
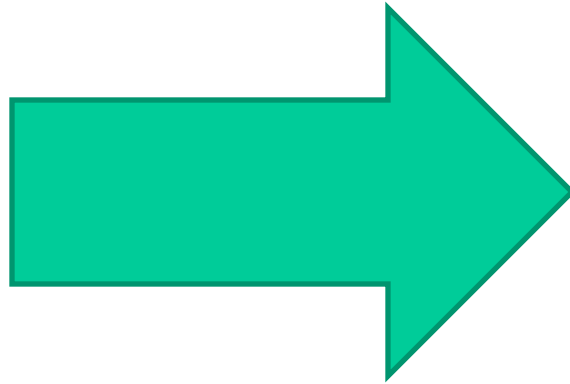


- Truck Trailer is another 'holding container'
- Pallet license plate scanned as pallets are loaded
- Packing list for trailer will show pallets/boxes/items
- Can have multiple trailers per shipment

# Container  Number Assigned/ Select Item to Pick

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Item: **EBN160 1' NAIL GUN CASE 3 PCK**   Pick List: **855230**   Customer: **LOWES CO-HY #0999** Carrier:
Qty Required **54.000**  / Qty Remaining **54.000**  /  Cases **18.0**  /  Skids **.5**

| BOX 000585086 | Complete | Return |
|---|---|---|

Item Container Number Assigned

| Select | Location | Cases Avail | Loc Qty | Picked | Cases Pckd |
|---|---|---|---|---|---|
| Pick | DFLT1 | 1269.4 | 3808.000 | | |
| **Totals** | | | | | |

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NOTES:

**Color Code:**
Dark Green - Discrete allocation for the item. Must pick allocated quantity from the location.

**Links:**
Cases Picked - Click/touch in box to print labels.

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**Luciano Lopez - Whs 1 Stage SHIP**

**Pick List Display**

Reprint of Documents

Print: Select

- Select
- Pro Forma Pack List
- Pro Forma Cntr Pack List
- Pick List
- Pro Forma BOL
- Container BOL

Return

Pick List: **855424**  Customer: **3274200 K-MART CORP**
Order: **319832**  Ship To: **K-MART CORP**
Carrier:   **DC INVOICING DEPT**
Qty Reqd: **200.000**  **3100 W BIG BEAVER RD**
Qty Picked: **200.000**  **TROY, MI 48084-3163**
**USA**

Sales order Header comments will appear just below Header information if they exist

### Pick List Items

Picking Detail of what was picked

| Item | Description | Reqd | Picked | Packed | Item Container | Holding Container |
|------|-------------|------|--------|--------|----------------|-------------------|
| T50 | T50 GUN TACKER | 100 | 100 | 100 | Lbl BOX 000585159 | Lbl PAL 000585160 |
| T50RED-6 | T50RED MANUAL STAPLE AND BRAD | 100 | 100 | 100 | Lbl BOX 000585161 | Lbl PAL 000585162 |

### Packing Containers

Clicking on "Lbl" Button will regenerate an item container label or holding container label.

| Lbl | Container | Description | Qty |
|-----|-----------|-------------|-----|
| Lbl | 000585160 | Pallet,Wood, Shipping | |
| Lbl | .000585159 | .Virtual Container | |
| | ..T50 | ..T50 GUN TACKER | 100 |
| | | | |
| Lbl | 000585162 | Pallet,Wood, Shipping | |
| Lbl | .000585161 | .Virtual Container | |
| | ..T50RED-6 | ..T50RED MANUAL STAPLE AND | 100 |
| | | | |

Packing Detail of container numbers of which items are in which containers

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NOTES:

Done   Internet   115%

# Enhanced Packing on RF Device

**YOUR CUSTOMER**

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VIA EDI, PHONE, FAX, WEB**

**OPTIONAL: ASSIGN
PRIORITY TO ORDERS**

**ELECTRONIC PICK LIST
RELEASED TO DEVICE(S)**

**SHIP VIA UPS/FEDEX/LTL
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**PICK / SCAN / VERIFY VIA
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**OPTIONAL: PACK
BOXES/CONTAINERS**

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# Parcel & LTL  Shipments

- The UPS/Fed Ex/DHL interfaces will send the pick to the XA Offline Ship files to be shipped!

- LTL uses standard XA Shipping Workbench

**YOUR CUSTOMER**

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**ASN AND/OR E-MAILTO
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**ELECTRONIC PICK LIST
RELEASED TO DEVICE(S)**

**SHIP VIA UPS/FEDEX/LTL
INTERFACE**

**PICK / SCAN / VERIFY VIA
DEVICE**

**OPTIONAL: PACK
BOXES/CONTAINERS**

# Shipment Notification via eMail

# Advance Ship Notice via EDI

- Advanced Customer Order Fulfillment is integrated with Electronic Commerce to provide ASN (856) capabilities
  - Uses ANSI X12 EDI standards
  - Provides SOPI (Shipment, Order, Pack, Item) information

  *XA containerization not required for ASNs!*

**YOUR CUSTOMER**

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**OPTIONAL: ASSIGN PRIORITY TO ORDERS**

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**ACCESS TO ORDER STATUS VIA PORTAL**

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**OPTIONAL: PACK BOXES/CONTAINERS**

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# Customer Portal



**Reach out to your customers with 24 x 7 information on orders and shipments.**

**Your customers can see the status of their orders and shipments, and access the tracking number all in real time!**

**YOUR CUSTOMER**

**COM ORDER –
VIA EDI, PHONE, FAX, WEB**

**OPTIONAL: ASSIGN PRIORITY TO ORDERS**

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**PICK / SCAN / VERIFY VIA DEVICE**

**OPTIONAL: PACK CONTAINERS VIA DEVICE**

Is improving customer service on your 'to do' list?

Customer Service is #1 in most Companies

Be a hero – take care of your customer!

# Advanced Customer Order Fulfillment for XA

*Share your customer issues with us and we will tailor a demonstration and show you how to fix them.*

*Ask your VP of Sales to attend!*

# Advanced Customer Order Fulfillment for XA

*THANK YOU!*

*Ben McCormick*

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*Ben.mccormick@cistech.net*