



Inventory Tracking Procedure

- 01** Enter the warehouse location (aisle/shelf/bin) of each product into the inventory management system to print stock locations on pick lists and inventory count sheets.

- 02** If using internal barcode labels on all products, affix barcode stickers to goods upon receiving them before moving stock to storage or pick locations.

- 03** Always store received stock in its prescribed location.

- 04** If the prescribed space is full, store overstock in prescribed overstock locations.

- 05** If storing overstock in a new location, be sure to note the alternate location on or near the main location label and report this up the management chain if needed.

- 06** For a new product, ensure that the storage location is noted or entered into the inventory management system before the product is shelved or stored.



Inventory Receiving Procedure

01

Upon delivery, count all received boxes, pallets, or shipped units against the shipping label and note any discrepancies between the number of units expected and number of units delivered.

02

Store received shipments together in a designated receiving area until the time to unpack.

03

Unpack units and organize items by type.

04

Count received items against your purchase order—not the vendor packing slip.

05

If received items match your purchase order, update the received item counts in the inventory tracking system.

06

If there are discrepancies, contact the vendor to resolve and update/adjust counts accordingly in the inventory tracking system.

07

Stock received items per product shelving or storage procedures.



Inventory Cycle Count Procedure

- 01** Choose a portion of inventory to count by product line, category, or storage location.

- 02** Print inventory count sheets from your inventory management system or create your own.

- 03** Identify a time and assign two staff members to count the selected stock without interruption.

- 04** Have one staff member count stock, including any overstock, and the other note the counts on the inventory sheet.

- 05** Once complete, confirm that numbers match on-hand numbers.

- 06** If counts don't match inventory records, follow up to identify and resolve any receiving, storage, or picking errors.



Batch Picking Procedure

01

Print (or create) a pick list that includes the items needed to fill a range of orders. Specify items by SKU or product name and include total quantities of each item.

02

Assign pick lists to pickers based on line or warehouse location.

03

Have pickers pull the total quantity of each product per the pick list.

04

Designate a space near the packing area to stage picked items for sorting.

05

Use printed order packing lists to sort or group picked items into individual orders for final checks prior to packing.



Per-Order Picking Procedure

- 01** Print order paperwork (packing slips or invoices).

- 02** Divide order paperwork into groupings by warehouse location, line, or category, and organize by complexity.

- 03** Provide pickers with a series of orders as well as crates, bins, or boxes to sort ordered items into as they pick. For large warehouses, rolling carts or trolleys speed up the process.

- 04** Have pickers bring pull items for each order and bring picked orders to designated staging spots near the packing area for final checks prior to packing.



Final Check & Error Resolution Procedure

- 01** Have staff members perform final checks on picked orders using barcode scanners or visual checks against order paperwork.

- 02** Examine for variables like size or color.

- 03** Have staff physically mark line items with a checkmark if needed to ensure accuracy.

- 04** If an error is found, move that order to a designated spot to be corrected without interrupting the checkers' progress.



Order Packing Procedure



01

Assemble all applicable shipping boxes or mailers for the group of orders to be packed.



02

Move one or a small group of checked orders from the staging area to the packing area (or pack checked orders where they sit if working in a small space).



03

Have packing staff do a final check (visually or via barcode scan) that the items to be packed match the order's paperwork.



04

Pack items as needed using appropriate, prescribed packing materials.



05

Insert or attach the order paperwork to the box and move it to the shipping area for labeling.



Batch Labeling Procedure

01

Cross-check the shipping label to the order packing slip or other paperwork included in the packed box.

02

Insert order paperwork, close and seal box, and affix label.

03

Move the parcel to the designated shipping cart or pickup area.



Single Parcel Labeling Procedure

- 01** Place the packed parcel on the shipping scale.

- 02** Enter or barcode scan the order number into your shipping system to populate the label information.

- 03** Select or enter the box size of the package.

- 04** Enter the weight and size of the package manually, or (if the scale is integrated into your system) double-check that the weight is correct.

- 05** Compare rates among carriers and various shipping methods in your shipping software program.

- 06** Select and purchase the appropriate carrier and shipping method.

- 07** Print label.

- 08** Insert order paperwork, close and seal box, and affix label.

- 09** Move the parcel to the designated shipping cart or pickup area.



Shipment Pickup Procedure

01

Sort parcels by carrier.

02

Print carrier end-of-day paperwork and shipment barcode labels.

03

Place end-of-day paperwork with the appropriate parcel stack.

04

Have staff meet the carrier driver and present end-of-day paperwork to be scanned.



Shipment Drop-off Procedure

- 01** Sort parcels by carrier and load into bags or bins (to ease transport).

- 02** Print carrier end-of-day paperwork and shipment barcode labels.

- 03** Place end-of-day paperwork with the appropriate parcel stack, bin, or bag.

- 04** Load parcels into vehicle, making sure to keep groupings separate if dropping off to multiple carriers.

- 05** Drop off parcels at carrier facility.

- 06** Present end-of-day paperwork to be scanned by carrier staff.