

Perishable GM Receiving

TL;DR Major points to keep in mind:

1. Counting and writing numbers on paper = **“verifying”**.
Updating numbers in the “Rcv” column in Prism module “301 Receiving” = **“receiving”**.
2. **Any discrepancies, potential and real, need EVIDENCE.**
e.g. A box on a pallet is busted open? Take a picture BEFORE opening the pallet or box. T-shirt in said box are covered in motor oil? Take ANOTHER picture (include the barcode in the picture or yet another picture).
3. **Keep damages separated.** Damages are reviewed by the Warehouse Leads, GM Buyers, or GM Manager. If it is just a few units, place them to the side with a note. However, be mindful of work space—if the bottom of a pallet is SOAKED and clearly damaged, take a picture OF THE PALLET, THE EFFECTED BOXES, AND THE PRODUCT, and then inform any of the aforementioned authorities.
4. **Perishable food needs to be kept fresh.** Either prioritize this receiving, or store in refrigerator/freezer.
5. **Receiving needs to be completed.** We cannot report discrepancies if there isn't SoH in prism. Receive the amount of product **per SKU** per PO in 301 actually, with notation about the damage quantities. Note that if after review, a buyer or manager deems a product ok to stock, adjust the damage notation amount on the receiving document. *Only writing on paper will not magically change in-system Stock on Hand or Discrepancies.*
6. **Paperwork submission needs to be consistent.** Submit already received paperwork to the GM Manager's mailbox (if new product) or the Accounting Specialist's mailbox (if reordered product).
7. **Keep plastic tote boxes for food credits during next delivery.** Create a pile specifically for different colored totes, crates, or other transport vehicles.
8. **Do NOT be the reason stock is damaged.** When opening cardboard boxes, cut into the corrugation, not the box space.
9. **Special Order merchandise need to be brought to their designated destination.** If the product is perishable and a special order, immediately find and work with an e-tech worker, lead, or the GM Manager to process this order ASAP.

Steps:

1. Identify the boxes at drop onto dock.
 - If individual carrier (UPS, FedEx, etc.), ensure the driver notes any damages BEFORE they leave. These damages are electronically recorded on their work scanner (sometimes a work phone, sometimes a dedicated device). If you don't witness them do it, request to see the damage record on their device before they leave.
 - If freight (truck dropping a pallet), note any damages on the Bill of Lading paperwork if available. If the truck company is all digital, then like individual carrier, ensure damage reports are made BEFORE they leave.
2. Check dropped packages into the Receiving Log.
 - Each receiving log record needs a unique timestamp, vendor, shipper, and PO number. If ANY of these four pieces of information do not match, a different record needs to be made.
 - a. Input above information in the respective fields in Receiving Log on a new record.
 - b. Input the expected number of boxes (e.g. a set of boxes 1 of 4, 2 of 4, 3 of 4, and 4 of 4 via shipping label information, is an expected number of 4 boxes).

- c. Scan or type each tracking number into the tracking numbers fields. Each number should have their own line. FM will not allow duplicate tracking numbers.
3. Print receiving document from Prism if Purchase Order is made, proceed to step **4**. If PO is **NOT** made, proceed to step **9**.
 - a. Open Receiving module 301.
 - b. Find Purchase Order
 - If PO# is provided, search PO number in the top search bar using default PO Number search query.
 - If PO# is not provided, change search query to XREF or CAT# and utilize the respective code on the product or product box. NEXT, open the quick results list (binoculars on top of note sheet), and locate an OPEN status order. Try to match the vendor. If there are not matches, check with a Manager.
 - c. Ensure there is an appropriate “out” quantity on the order—nothing will print on the receiving document if the item line is 0 or negative out.
 - d. Click the printer button or use quick command “CTRL” + “P” to open a report printer dialogue box.
 - e. Select Print Purchase Order Receiving Document (custom)
 - f. Select appropriate printer and print.

4. Verify integrity of product while counting and noting quantities on receiving document.

- a. Any NEW product needs to have its UPC/XREF verified. If the receiving document doesn't display a matching barcode, be very thorough with assessing product name, size, flavor, color, edition, etc.
 - Do NOT be the cause for imperfections by slashing product when opening a box! Cut into the box's corrugation, not the packing space. If you do not know what this means, ASK. There is no shame in learning, only in pretending you know and then being wrong.
 - b. Any reordered product needs to have its costs and displayed price verified.
 - If a packing slip doesn't show costs, then request a copy of the order acknowledgement or invoice from the respective buyer.
 - If you need to update a retail price, also print out an additional shelf tag to correct the front display on the sales floor.
 1. Food target margin: 50%, cents ending in x.49 or x.99
 - c. Perishable food needs visible “Best By”, “Use by”, or other end dates on them. Most prepackaged foods.
 - d. ALWAYS verify intended product against actual product. Do NOT assume today's bag of Cheetos is the same as last week's bag. Sometimes a vendor will ship a substitution or the manufacturer updated a barcode or size.
 - e. If a product is deemed damaged, we must document this damage. Picture proof, including barcode is necessary for reporting to the vendor/manufacturer. Written documentation on the receiving document is needed for bookkeeping. Seclusion of damaged product is necessary in case a return is necessary for credit. If a return is necessary for perishable items, store in refrigerator with a note “TO BE RETURNED”.
5. Receiving product into Prism.
 - a. Ensure module 301 Receiving is set to the same Purchase Order as the filled in receiving document you're working on.
 - b. Verify the SKU and quantity you're looking at. Different sizes and flavors will often have different SKUs.
 - c. Input the number of each SKU counted into the Rcv column.
 - Do NOT simply override the number in the Rcv column if it is non-zero. Partial receiving happens. There is NO undo button. Be careful and do the math! (i.e. if a SKU has 3/8 already received, and you counted 5, the Rcv column should now read 3+5, 8/8.)

- You MUST include damages in your received count. We cannot report discrepancies if there isn't SoH to work with. Positive numbers in the Rcv column increase SoH counters by that same number. We cannot generate a return if there is no SoH of a SKU.
6. Double check the item line's global notes section for Special Order status and if applicable, destination.
 - a. Special order items need to have a special order label printed out from FileMaker Pro's Special Orders module. Utilize the "CSQ" special order code to pull up the order and print this label.
 - b. Special orders for perishables should be immediately communicated to an e-tech member, lead, or the GM Manager to ensure the order is processed in a timely manner and the customer is aware of the order ASAP.
 7. Submit received Receiving Documents to the intended recipient.
 - a. Documents with reported damages should be submitted to the appropriate buyer for credit inquiries with the supplier.
 - b. If there are no damages, new products' documents should have a sample of the product and the receiving document brought to the GM Manager for review and steps to upload a photo to our website.
 - c. If there are no damages, reordered products' documents should be submitted to the Accounts Specialist's mailbox for efficient invoicing.
 8. Stage the product in its intended location(s) on the sales floor, and then back stock any remainder to its appropriate warehouse location. This is the final step in standard perishable food receiving.
 - a. Work with the Merchandising team for sales floor locations.
 - b. Check the "Locations" tab in FileMaker Pro's Receiving Log, Stockroom Locations, product page for the intended warehouse location. If the Locations tab needs updating, talk to the GM Manager or other knowledge base individuals that are able to make these edits without breaking the interface.
 9. **Create a dummy verification list on the register.**
 - a. Scan the product on the register by xref.
 - b. Edit the quantity to match the counted amount.
 - c. Stage the perishables in the sales floor refrigerator.
 - d. After all perishables have been recorded, suspend the transaction and save the receipt.
 10. Create a new PO utilizing reference information from the delivery manifest / invoice.
 - a. Do NOT adjust manifest or invoice numbers even if there is a real variance at this point.
 11. Post PO and then print a receiving document.
 12. Fill in receiving document using suspended receipt as your delivery count.
 13. Retrieve the suspended receipt on POS, and cancel.
 14. Resume standard steps 5-8.