Warehousing Logistics Associate





Warehouse

Chapter 1

Basic Warehousing and Logistics

Learning Objectives

- Define the basic responsibilities of warehouse operations
- Identify common warehouse layouts
- Explain the different types of docks
- Discuss common computer applications used in warehouse operations
- Discuss roles of 3pl's in our supply chain

Basic Roles & Responsibilities

- Warehouse & DC
 - 1. Receiving
 - 2. Stocking-put away and storage
 - 3. Order Picking/Processing
 - 4. Shipping

Other Roles & Responsibilities

- Warehouse & DC
 - 1. Prepackaging-when rec. in bulk
 - 2. Sorting and accumulation
 - 3. Packing
 - 4. Pricing

Types of Warehouses

- Raw material and component warehouses
- Work in progress warehouses
- Finished goods warehouses
- Distribution centers
- Fulfillment centers
- Local warehouses
- Value-added service warehouses.

Areas common to most facilities

- Bulk Storage
- Case Storage
- Broken case/repack
- Inbound Staging
- Outbound Staging
- Receiving dock
- Shipping dock









Types of Docks

- Flush/straight docks optimize interior space.
- Open docks have high potential for theft and damage.
- Rail Sidings.

Computers and Logistics

- Internet access
 - Usually only given on an as needed basis, can be used for research, pricing, order status, shipment tracking, etc.
- WMS (Warehouse Management System)

 Receiving, stocking and inquiry functions
- TMS (Transportation Management System)

 Planning, vehicle tracking, loading and routing.

Computers and Logistics

- CRM (Customer Relations Management)
 - Contact information
 - o Terms
 - Order history
 - Payment history
 - Purchasing history

YMS (Yard Management System)

- Trailer inventory management
- Door management support

3PL's Third Party Logistics providers

- Also called logistics outsourcing or contract logistics.
- When a company hires or allows a specialist company to provide one or more of its logistics functions.

3PL's Third Party Logistics providers

• Transportation based servicesfreight movement: logistics solutions fulfillment centers cartage transportation management

3PL's Third Party Logistics providers

 Distribution based services: contract warehousing: warehousing inventory management order fulfillment

3PL's Third Party Logistics providers

 Forwarder based services-flow of goods: freight forwarders freight brokers freight agents

3PL's Third Party Logistics providers

 Financial based services-monetary issues: freight rating freight payment freight bill auditing

3PL's Third Party Logistics providers

 Information based services: online freight brokerage cargo planning routing and scheduling online WMS/TMS

Review

- Identify basic responsibilities of warehouse operations
- Explain the two common layouts of modern warehouses
- Describe different types of docks.
- Describe computer applications
- Describe popular 3PL services

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Receiving



Learning Objectives

- Describe efficient receiving activities.
- Identify proper receiving procedures.
- Discuss the importance of insuring product quality, quantity and condition.
- Identify the basic documents used in the receiving process.
- Discuss our relationships with our supply chain partners.

Definition

Receiving

- Confirming it is the right product in the right quantities and that it is usable and sellable.
- Distribution of incoming products to the proper storage area, customer or stakeholder
- Receiving is our initial involvement in the supply chain
- "Garbage in/Garbage out"

Receiving Practices of highly efficient companies

- Direct shipping
- Cross-docking
- Receiving scheduling
- Pre-receiving
- Receipt preparation-prepackaging, cubing and weighing, labels and tags

Receiving Practices of highly efficient companies

- Cross-docking
 - Deliveries are scheduled
 - Sorted immediately to outbound orders and docks
 - Staging, inspection and storage not required
 - Needs barcode/RF & single SKU

Receiving Practices of highly efficient companies

- Receiving scheduling
 - Helps match inbound/outbound
 - Balances use of docks, people and equipment
 - Shifts time consuming tasks to off peak hours

Receiving Practices of highly efficient companies

Pre-Receiving

Helps balance people and equipment Information is sent to the receiver ahead of time

Products to be received can be confirmed and given storage locations

Receiving Practices of highly efficient companies

• Receipt Preparation

Preparing the product for shipping when it is received.

Applying labels and tags.

Preparing products by quantities, weights, sizes etc. for storage or transportation.

Receiving Procedures

- Driver or carrier schedules inbound delivery
- Arriving vehicle is assigned to specific location:
 - Assigned to a Dock Door
 - Assigned to a Drop Lot
 - Placed in Queue

Receiving Procedures

- Vehicle is secured at dock by using:
 - Dok-Lok or Wheel Chocks
 - Landing Legs-if the trailer is dropped insure the landing legs are lowered and engaged.
 - Nose Jack-use in addition to the landing to the landing legs whenever available.

Receiving Procedures

- Driver & Receiver inspect seal if used and confirm the seal number.
- Receiver visually inspects the load.
- Delivery receipt is given to the receiver and serves as our title to the goods.
- If accepted, shipment is unloaded

Receiving Procedures

- Compare the D/R and packing slip with the PO number.
- Check for correct quantities.
- Inspect goods
- Document damages or shortages on the D/R immediately
- Take pictures of any damage

The Receiving Process

Once the product is accepted it is:

- Staged for inspection
- Shortages and damages are reported
- Product is sent to the proper location

The Receiving Process

- Check the following information for accuracy
- Materials listed on the packing slip match P.O.
- Consignor
- Consignee
- Purchase order number
- Item stock number
- Complete item description
- Number of containers/number of units per container
- Total number of units received
- Number of units short or over

Rejecting the Shipment

If we reject the shipment:

- We lose control of shipment
- We may have to pay other shipping and delivery costs
- Customers may go without product

Accepting the Shipment

If we Accept the shipment:

We assume responsibility for load

We lose negotiating power with vendors and carriers

We have to manage the claims process

Review

- Describe efficient receiving activities.
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Storage



Learning Objectives

- Discuss Efficient class put away practices.
- Identify factors that determine storage requirements.
- Describe basic storage forms.
- Understand the importance of accuracy to our operation.

Put-Away

- Accuracy and efficiency are required
- Product may go to different places:
 - Cross-dock to match customer order
 - Manufacturing
 - Storage
 - Distribution
 - Order picking

Put-Away Practices of efficient companies

- Direct put away-bypasses staging and inspection and replenishes stock from receiving dock
- Directed put away-WMS directs put away to maximize efficiency
- Batched and sequenced put away-per zone
- Interleaving-continuous movements

Put-Away Practices of efficient companies

• Directed put away The WMS directs operators to locations to maximize cubing, retrieval productivity and rotation.

Put-Away Practices of efficient companies

• Batched and sequenced put away

Inbound material is sorted for efficient put away by Warehouse zone or sequence.

Put-Away Practices of efficient companies

Interleaving

Combines order picking and put away functions to create continuous movements and eliminate empty travel or deadheading.

Determining Factors

- Volume or through put- amount of product moved through the facility
- The handling characteristics of the product or its container
- Size and quantity of individual items
- Supply chain and production requirements

Storage Locations

Locations can vary by:

- Building
- Zone
- Aisle
- level
- Position

Storage Forms

- Bulk/Block stacking- cases or pallets are stacked on top of each other on the floor
- Stacking frames-attached to pallets or self contained frames
- Pallet racks
- Bins, Shelves & Drawers

Storage Forms

Racks

- Standard-one pallet position deep
- Double Deep-two pallet positions deep
- Drive in/through-open at one end to drive into or both ends to drive through

Storage Forms

Racks

- Flow racks-used for FIFOloads from one side and pulls from the other
- Push back racks-used for LIFO-loaded and pulled from the same side
- Mobile pallet racks

Other Storage Options

Slip Sheets Plastic totes Metal containers Crates Barrels and drums Carousels Vertical lifts A-Frame dispensers mezzanines

Automated Storage and Retrieval Systems

- Very expensive to use
- Designed to improve efficiency
- Reduces the costs of human capital
- Focus man power where needed.

Review

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Inventory



Learning Objectives

- Define the basic types of inventory
- Discuss classes of inventory
- List common inventory control methods
- · Identify the basic methods of counting
- Discuss inventory costs
- Describe how information is captured

What Is Inventory?

- Inventory Is:
 - A complete listing of goods and materials maintained to support production and normal demand patterns.
 - A regularly scheduled count of stock taken a company.

What is Inventory Management?

Inventory management controls the movement of goods and materials through the companies supply chain from order receipt through order fulfillment or production.

What is Inventory Management?

Inventory management allows us to:

- Maintain stock levels
- Lower costs
- Improve accuracy and efficiency
- Eliminate stock-outs
- Ensure customers satisfaction

What is a Warehouse Management System (WMS)?

A warehouse management system and an inventory control system for many companies are the same thing. However while the WMS provides the same capabilities as the inventory management system it has other advanced applications and allows us to manage entire storage systems.

What is a Warehouse Management System (WMS)?

A warehouse management system is a computer-based system used to control the movement and storage of products and materials in the warehouse.

The Warehouse Management System (WMS) should be able to:

Reference products location, PN#. Description, UOM, P.O.#, Customer #, etc. Build and provide item descriptions List vendors and suppliers Calculate inventory usages Establish lead times Set safety stock levels Set order quantities Set reorder points Record receipts Record issues Show Qty. on hand and Qty. available Calculate inventory turn over rate

Re-ordering Inventory

- **Cyclical ordering-** a time-based system where items are purchased on a predetermined schedule to meet sales and production requirements.
- Fixed order quantity system Uses predetermined reorder points and Max./Mins. to trigger purchase orders. When inventory gets to a certain level an order is placed so that inventories stay within a predetermined range.
- MRP (material requirements planning) a computer based system analyzes production needs and determines when and how much to order.

Fixed order quantity system

• Terms to remember:

- Safety Stock-Inventory quantity which is considered adequate to protect against stock-out caused by late deliveries by the supplier, unreliable lead time, and unexpected heavy usage.
- Re-Order Point-A pre-determined inventory level where a replenishment order should be placed. This point will be the accumulation of the inventory needed to satisfy the normal order quantities for the delivery period plus safety stock.
- Max/mins- The maximum and minimum stocks levels required per item.
 Inventory turnover- The number of times that inventory is sold in a particular
- Inventory turnover- The number of times that inventory is sold in a particular year.

Fixed order quantity system

• Formulas:

Safety Stock=(max. daily usage - avg. daily usage)x lead time in days.

Reorder point=(avg. daily usage x lead time in days) + safety stock.

Order quantity=days required x avg. daily usage

Fixed order quantity system

• Formulas:

Maximum inventory levels=(reorder point + reorder Qty.) – (minimum usage x minimum lead time).

Minimum inventory levels=reorder point-(avg. lead times x avg. usage)

Classes of Inventory

- Cycle or base inventories
- Safety or buffer stock
- Speculative or anticipation stock
- Pipelines or in transit inventories

Types of Inventory 3 Basic types

- Raw materials/supplies to support production
- Work-in-progress items (WIP)
- Finished goods

Types of Inventory Others

- Internal use only
- Promotional
- Purchased products for resale and distribution

Inventory carrying costs

- Obsolete or expired inventory
- Shrinkage-damage, loss, theft
- Storage costs
- Insurance costs
- Taxes and interest
- Opportunity costs

Inventory carrying costs

• Stock out costsdelayed sale lost sale lost customer

Inventory carrying costs

The carrying cost is usually shown as percentage of the total inventory value.

So if an item cost \$100.00 and the carrying cost is 20% the carrying cost for that item is \$20.00

It is estimated that these costs account for 20-30% of each dollars worth of inventory.

Inventory control methods

- JIT (just in time)
- ABC Analysis
- FIFO (first in first out)
- LIFO (last in first out)

JIT Inventory Control Method

- JIT focuses on the supplier to the producer
- It reduces the need for safety stock since materials arrive at the exact time needed.
- Closely related disciplines are:
- ECR-Efficient Consumer Response used in the Grocery industry.
- CFR-Continuous Flow Replenishment used in the Electronics industry.
- QR-Quick Response used in the textile industry.

ABC Inventory Control Method

- Focus is on controlling the fastest moving / highest cost items in your inventory
- Base on the 80/20 rule or Pareto Principle
 - <u>A items = Fastest Moving items</u>
 - Primary focus is on the 20% of our products that generate 80% of our sales. Products are sometimes stored close to the doors and floors.
 - <u>B items = Next fastest & can move up to A list</u> Represents the percentage of our products that generate 15% of our sales.
 - <u>C items = Slowest movers / can be 50 % of inventory</u> Represents the products that generate 5 % of our sales.

FIFO (First-in-first-out)

- Used for products that are affected by spoilage, shelf life, dust damage or infestation
- The oldest or first item received is the first item to be sold

LIFO (Last-in-first-out)

- The last or newest item placed in stock and sold first
- Used in retail electronic stores
- · Accounts for the increased costs of inventory over time

Used by companies for income tax referral

Count Methods

- Random count-a specific SKU is counted to verify the exact amount recorded in the WMS.
- Cycle count–Based on ABC analysis I.E. "A" items are counted 8 times per year. "B" items 4 times per year and "C" items 2 times per years. Used to maintain accuracy between fiscal counts.
- Fiscal count- a complete yearly inventory usually conducted for financial reasons and tax liabilities.
- Recounting

Capturing Information

- Most location systems today are computerized and maintain a live inventory.
- They keep up with inventory on an ongoing basis
- The main methods of capturing data include:
 - Bar codes
 - o RFID (Radio Frequency Identification)
 - o Magnetic Stripes and smart cards
 - o Vision systems/OCR (Optical Character Recognition)
 - o Manual entry

Capturing Information

- The UPC or Universal Product code is the most popular barcode.
- It can be used for:
 - \circ Product ID
 - Container ID
 - \circ Location ID
 - \circ Operator ID
 - Equipment ID
 - Document ID

Capturing Information

- The RFID tags are a data chip enclosed in a tag.
- The data chip uses an EPC (electronic data code)
- When the tag is within range of an antenna the tag will be decoded and read.
- They can be programmable or permanently coded.
- They are commonly encoded and placed in shipments or on the windshields of trucks allowing the shipment progress to be tracked.

Reverse Logistics

- Returned or refurbished items
- Most warehouses/distribution centers have systems for handling returned goods
- Quite often, this is a separate department
- Company policy will dictate how these products are handled

Review

- Define the basic types of inventory
- Discuss classes of inventory
- List common inventory control methods
- Identify the basic methods of counting
- Discuss inventory costs
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Chapter 5

Order Picking/ Processing

Learning Objectives

- Describe basic order picking activities
- Identify technologies used in order picking/processing
- Understand the importance of order picking/processing to the success of our business

Order Picking (Filling)

- Considered the most expensive part of supply chain process.
- Because customers expect us to do more for less more to focus is on quality, accuracy and frequency.

Order Processing

• The Order or request is received:

Subject to initial screening-checking customer information-do I want to sell to that customer.

Assess ability to fulfill order-do I have to product in stock.

The Order is entered and released The Pick Ticket is generated

Order Processing

Document or electronic
Sequenced
Specific Information
A SKU or Stock
Since Stock
Q
Since Stock
Q
Since Stock
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Since Stock
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Order Processing

Basic picking strategies:
Single Order picking-pickers pick single orders one at a time like a grocery list
Batch Picking-pickers pick multiple orders like multiple grocery lists

Order Processing

•Basic picking strategies:

•Zone Picking-pickers pull items in their assigned zone such as an aisle, section of aisles or machine as with batch picking

•Progressive order assembly-orders are passed from one zone to another until the order is complete

Order Processing

Basic picking strategies:
Wave picking and sortationpickers do not pick per order they pick all the items that are in their zone in waves and the products are sorted into orders downstream

Technological Improvements

- High Tech improvements include:
 - Bar-Codes & Scanners
 - RFID and Radio Data Terminals
 - Pick-to-Light
 - Pick-to-Voice

Order verification(quality control)

- Items are compared with pick ticket for accuracy either through visual verification or bar code verification
- Barcodes eliminate potential mistakes
- Once the orders have been verified they are processed and staged for shipping

Outbound Staging

- Orders are packed, shrink wrapped and completed orders staged
- Additional services may be required such as adding:
 - Hardware kits
 - Marketing info
 - Packing slip

Review

- Describe basic order picking activities
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Shipping & Transportation



Learning Objectives

- Discuss shipping practices of efficient companies
- Define selection criteria for packaging materials
- Describe Bills of Lading
- Discuss shipment tracking
- Discuss the basic modes of transportation
- Discuss the trucking industry and how it affects us

Shipping Practices of efficient companies

- Direct loading
- ASN preparation
- Staging
- Container optimization
- Loading or void fill
- Weight checking
- Automated loading
- Dock management

Packaging Selection Criteria

- Fragility & Value
- > Amount & Size
- Cost Requirements
- > Type of Transport
- > Loading & Unloading Storage of Product
- > Number of units being shipped together Customer Shipping Instructions
- Volume & Weight of Packaging

Packaging Selection Criteria

Environmental Concerns

- Product Protection
- > Impact of Disposal
- > Material Waste
- > Interaction between product & Package

The package needs to Protect product...

Warehouse documentation

- Bill of Lading
 - Created by the shipper
 - Contract between Shipper & Carrier
 - Serves as our receipt or title for goods
 - Transfers title of goods to carrier

Shipment Tracking

- Shipments are assigned a tracking number when processed.
- Shipments are assigned a PRO number when picked up by a carrier.
- Most carriers and shipping companies have a dedicated "tracking" web page where you can enter the tracking or PRO number for location and status.
- RFID tags and satellite technology can be used to track shipments in real time.

5 basic modes of transportation

- Pipelines
- Water
- Rail
- Motor Carrier (Highway, Truck)
- Air

Focus on the Trucking Industry

- Truck services
 - Door-to-door service
 - Frequent pick ups and drop offs
 - LTL (less than truckload)
 - FTL (full truckload)

Focus on the trucking industry

Truck Types

- Dry Van
- Temperature controlled
- Flat Bed
- Curtain Van
- Step Deck
- Double Drop

Focus on the trucking industry

- Truck Types
 - Line haul trucks (53' or some combination) move freight between cities
 - Straight trucks or 48' trucks usually perform pick up and delivery services within the city

Legal Classifications

- Common Carrier-open to the public
- Contract Carrier- contract basis only
- Private Carrier-privately owned
- Exempt Carrier- exempt from economic regulation i.e. agricultural



- Control over business practices
- Entry and exit
- Pricing and services
- Merger acquisitions





Hub and Spoke System

P.U.D. -pick up and delivery system generally used by LTL carriers

Break Bulk system- A break-in-bulk point is a place where goods are transferred from one mode of transport to another

Relay system- in which drivers are substituted at a designated point to meet H.O.S. requirements and is usually used by long haul carriers

Modal Comparison

• Air

- Suitable for high value, small shipments moving long-distance
- Most expensive mode
- Requires trucks to move product to and from customers and shippers

Intermodal

• Intermodal

- Uses 1 or more modes of transportation without significant handling
- Most visible with ISO or shipping containers
- Typically refers to:
 - TOFC-trailer on flat car
 - COFC-container on flat car

Intermodal

ISO Container

- Standardized for International Transport
- 020', 40', & 45' suitable for
- international
- 048' & 53' suitable only for US domestic

Choosing Best Mode

- Cost is key
 - · Transportation costs can be significant
 - Shipment Size vs. Service Frequency
 - Speed vs. Cost
 - Packaging Requirements
 - Lane Capacity / Availability

Review

- Discuss shipping practices of efficient companies
- Define selection criteria for packaging materials
- Describe Bills of Lading
- Discuss shipment tracking
- Discuss the basic modes of transportation
- Discuss the trucking industry and how it affects us

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Customer Service

Chapter 7 Customer Service Basics

Keys to great Customer Service

1. Deliver on Time: Our customers have deadlines and responsibilities and our mistake may affect many different parties.

Keys to great Customer Service

2. Meet Quality Standards: Product must be usable, sellable and meet specifications.

Keys to great Customer Service

3. Offer Assistance: Help the customer with product changes, purchasing and shipping issues or any issue they may have.

Keys to great Customer Service

4. Review Customer Needs: Know the products your customer use, the products they produce and their processes.

Keys to great Customer Service

- **5. Be Proactive:** Be aware of issues as they arise and take corrective action to resolve the issue.
- "It is not a problem until it's a problem"

What's important to the customer

- 1. Quality
- 2. Price
- 3. Reliability
- 4. Convenience
- 5. Availability

What's important to the customer

- 6. Treatment by staff
- 7. Reputation
- 8. Variety
- 9. Skill or expertise of staff
- 10. Guarantee

What's important to the customer Failure of any of these

points can result in the loss of a sale or the loss of a customer.

Customer Communication

- Communication with the customer is a very important part of great customer service.
- The following are basic guidelines for communication with both External and Internal Customers:

Keys to great Customer Communication

Be Accurate and honest: Have your facts straight customers don't care about why only how we're going to fix it.

Respond Quickly: Customers need to be informed so they can make the right moves and decisions.

Be Positive: Customers should feel your doing everything in our power to resolve the situation.

Customer Communication

Stay Calm: Tensions can run high for all parties, remember you building a relationship.

Recognize Limitations: Sometimes the answer is NO and sometimes there is nothing you can do. Don't make promises you can't keep.

Seek Feedback: Make sure the customers is happy and we have met all their needs. Make the necessary adjustments to insure customer retention.

Maintaining the Relationship

- Once the relationship is established it is important to maintain that relationship.
- Studies show that it is more expensive to get a customer back than it is to keep them.

- Bad customer service can be costly in several ways:
 - The cost of repairing or replacing defective products
 - Bad publicity can harm the companies reputation
 - The relationship with the customer can be damaged by poor service or quality and can lead to the loss of that customer.

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5

Samples

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Ļ	1 10 M	in the Marson Section in	A. 6			Collect	- 45 AU			-2	*
	l lote - Wi	here the rate is	dependent on	value.	Subject to Section 7 of the	conditions, if this		FREIC	HTCHAS	GES	H I CHINA
	shippers are	a required to sta	its specifically i	in writing the	shipment is to be delivered to	o the consignee without					
Ĩ	agreed of d	BCIBIEU ABIOB DI	r ine property.		following statement.	ne cosignor snall sign the			EIGHT PR	EPAID	
	The agree	ed or declared v	alue of the pro	perty is	The sector shall be a sinter	4-15		(for fewe	rthan 4 cy	linders)	1
	exceeding	ancany stateu p	y the shippen to		Without payment of freight an	id all other charges.					1
	-						\cap				
	5		şı		(Signature of	Consignor)		901 4 0I	There Cyan	nders;	
1	PECEIVE	D subject to th	e o yor to dev.	e and facilite i	a siled on the date of the ice	and this Bill of Ladias the ar	<u>.</u>	a segar te	or allow all the second second	n jangan Belger	2 49 *
4	except as no	oted (contents a	and condition of	contents of	packages unknown), marked.	consigned, and destined as in	dicated abo	we which	said carri	rent good ora: er the word c	er. arrier
	being under delivies, et e	stood throughos	ut this contract	as meaning :	any person or corporation in p	ossession of the property under	er the contra	act) agree	es to carry	to its usual pl	ace of
	said propert	aro destriación. y overalt or any	portion of said	route to desi	usiver to another carrier on th ination and as to each party a	e route to saiα destination, it t any time interested in all or a	is mutua#y iny of said d	agreeg as property, t	s to each d hat every	amer of all or service to be	any cr.
2	performed h	ereunder shall I	be subject to al	I the bill of la	ding terms and conditions in th	re governing classification on t	the date of	shipment			
	Shipper h	ereby certifies t	hat he is familia	ar with all the	bill of lading terms and condit	tions in the coverning classific	ation and th	e said ter	ms and co	anditions are h	hereha
1	to by the shi	pper and accep	ted for himself	and his assi	ns.	ger annry anarallity					азыў
1	Shipper			و مربع مورد مر	<u> </u>	Carrier		entra ann	1995 - C. B.	e seleta e e	and the second s
	Per				()	38)				C	NE
- 9						8 4			-		



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Pick Order

Page 1 of 1

4/30/2015 12:38:50PM

Customer 1423: Steve Wilson The Plane Palace 37413 Tobacco road Pigsknuckle, Arkansas 84321	Order Number Reference Number	00003
	Order Date	4/30/2015
	Due Date	
	Shipment Method	
Item Number Description	Requested P	icked Remaining Site I ocstion: Otv

3012643		Item Number
	3/4" Paraguzi nut	Description
	1	Requested
	0	Picked
Each	1	Remaining
	MCCKC/BTC/2B-1-3A FLOOR: 5	Site / Location: Qty

Picked By

Purchase Order

PO Number:	00002
Reference Number:	
Order Date / Due Date:	4/30/2015
Ship Method:	
Pay Method:	

Wally's Widget world
1234 Warm Street
Nicenhot, florida 39246

\$17.02	Total	_			
\$17.02	\$17.02	_	Each	3/4" Paraguzi nut	3012643
Extended Price	Unit Price	Ordered	NON	SKU	

Authorized Signature