

# **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”?

# Your Challenge

*Exceed* customer expectations

AND

optimize internal operational  
efficiencies

# 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

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# 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-MAIL TO  
CUSTOMER**

**ACCESS TO ORDER STATUS  
VIA PORTAL**

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

**OPTIONAL: PACK  
BOXES/CONTAINERS**





# 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

# 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



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



# *RF Handheld Device & Powerlink (supervisory functions)*

Pick List 646

1000

PC, 166 MHZ, D

Staging Loc

Reqd: 5.000

Picked: .000

Remain: 5.000

Location FG01

Qty .000

F2=Rtn F3=Ext F4=Adj

F5=Avl F6=Ver F7=Sub

(73) RF PPS XA Pick List Header

File Display Maintain Customize User Navigation Help

General Valid for Badge Ass...

RF PPS XA Pick List Header

Empry	Whse	Priority	Pick List	Badge	Customer	Order	Carrier	Pick Header Type
1	1	3	631	10 = JEFF E...	American Computing	11034	ROADWAY	0 = Regular Pick
1	1			643	American Computing	11039	UPS	0 = Regular Pick
1	1			644	American Computing	11042	UPS	0 = Regular Pick
1	1	2		645	10 = JEFF E...	11043	UPS	0 = Regular Pick
1	1			646	American Computing	11044	UPS	0 = Regular Pick
1	1	1		647	10 = JEFF E...	11045	UPS	0 = Regular Pick
1	1			648	American Computing	11046	UPS	0 = Regular Pick

(73) RF PPS XA Pick List Header - Company: 1 Pick List: 631

File Display Maintain Customize User Navigation Help

Default

Company: 1 Pick List: 631

Badges Assigned Pick List Items General

Badge	Priority
10 = JEFF E...	3
20 = SAND...	0

Continue Help

**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



Rafael Antonio Vasquez - Whs 1 Stage SHIP

Picklist Selection

List of picklist sequence by priority.

Print: Select Report

Pick

Pack Verify

Select	Prt	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

Picklist in Dark Green are assigned directly to the individual

Powered by Cistech, the Mapics Experts

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%



# 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

Pick Pack Verify

Select	Prtly	PickLst	Ship To	Stage	Date	# of Items	Ttl Units	Cases	Skids
<span>Select</span>	1	855281	COLUMBUS, OH USA	SHIP	12/06/11	3	260	52	1
<span>Select</span>	1	855369	OAK BROOK, IL USA	SHIP	01/20/12	2	2000	93	4
<span>Select</span>	1	855370	OAK BROOK, IL USA	SHIP	01/23/12	2	2000	93	4
<span>Select</span>	2	855138	MONSEY, NY USA	SHIP	11/30/11	18	1092	22	1
<span>Select</span>	2	855156	EAU CLAIRE, WI USA	SHIP	12/09/11	15	2944	168	2
<span>Select</span>	3	855328	CAPE GIRARDEAU, MO USA	SHIP	12/09/11	24	2450	93	1
<span>Select</span>	5	855227	VALDOSTA, GA USA	SHIP	12/06/11	41	20631	1056	13
<span>Select</span>	5	855158	PLANO, IL USA	SHIP	12/09/11	17	4075	238	3

Pro Forma Pack List

Pro Forma Cntr Pack List

Pick List

Powered by Cistech, the Mapics Experts

NOTES:

**Color code:**

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- Green - Verified Picklists
- Yellow - Highlight for Selected Orders
- Dark Green - Pick List is assigned to current employee

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RELEASED TO DEVICE(S)**

**PICK / SCAN / VERIFY VIA  
DEVICE**



Picklist is selected and line items to pick are displayed.

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
	HAMMER TACKER NEW HANDLE	855230	A0340	44.000		44.000	11.0	.2	102.520	PAL
Select	JT27	855230	A0020	264.000		264.000	11.0	.3	293.832	PAL
	LIGHT DUTY STAPLE GUN JT21 STP									
Select	MG24-4	855230	E0090	240.000		240.000	10.0	.1	57.840	PAL
	4"ALL PURP GLUE 24STX4PK									
Select	MT300	855230	A0530	240.000		240.000	20.0	.4	120.000	PAL
	MINI GLUE GUN									
Select	RHT300	855230	DFLT1	96.000		96.000	8.0	.3	168.000	PAL
	SWIVEL HEAD RIVET TOOL									
Select	RH200S	855230	A0030	199.320		199.320	11.0	.3	199.320	PAL
	PROF RIVET TOOL									
	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**

Whs: **1**

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

Rqd Qty: **54.000**

[Return](#)

Scan Item and Location for verification

Stage Location:	<b>SHIP</b>
Container:	<b>BOX 000585086</b>
Item:	<b>EBN160</b>
Location:	<b>DFLT1</b>
Quantity Picked:	<input type="text" value="54"/>

[Focus](#)

[Submit](#)

[Container](#)

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

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

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

Items marked COMPLETE but picked SHORT Show in GOLD Color

# YOUR CUSTOMER

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**OPTIONAL: ASSIGN  
PRIORITY TO ORDERS**

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RELEASED TO DEVICE(S)**

**PICK / SCAN / VERIFY VIA  
DEVICE**

**OPTIONAL: PACK  
BOXES/CONTAINERS**





# 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 not 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



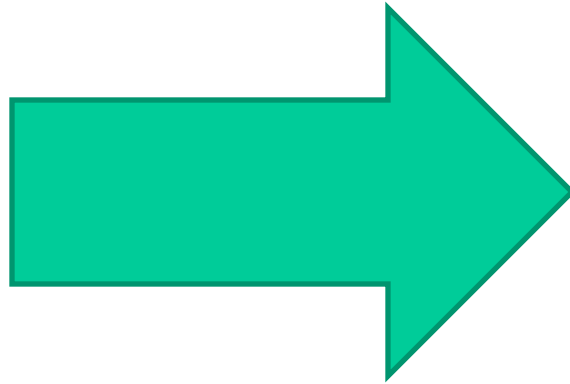
- Bar coded label with container number, CO, customer PO
- Can print packing list per box
- Items can come straight from shelf location (pack while picking) or from staging location (pick, stage then pack)

# 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



Rafael Antonio Vasquez - [Whs 1 Stage SHIP](#)

Pick Items

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.



## Picklist Display from Picklist Drill Down



### 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**  
**3100 W BIG BEAVER RD**  
**TROY, MI 48084-3163**  
**USA**

Qty Req'd: **200.000**  
 Qty Picked: **200.000**

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

#### Pick List Items

Item	Description	Quantities			Item Container	Holding Container
		Req'd	Picked	Packed		
T50	T50 GUN TACKER	100	100	100	<div style="border: 1px solid blue; padding: 1px; display: inline-block;">Lbl</div> BOX 000585159	<div style="border: 1px solid blue; padding: 1px; display: inline-block;">Lbl</div> PAL 000585160
T50RED-6	T50RED MANUAL STAPLE AND BRAD	100	100	100	<div style="border: 1px solid blue; padding: 1px; display: inline-block;">Lbl</div> BOX 000585161	<div style="border: 1px solid blue; padding: 1px; display: inline-block;">Lbl</div> PAL 000585162

#### Packing Containers

Lbl	Container	Description	Qty
<div style="border: 1px solid blue; padding: 1px; display: inline-block;">Lbl</div>	000585160	Pallet,Wood, Shipping	
<div style="border: 1px solid blue; padding: 1px; display: inline-block;">Lbl</div>	.000585159	.Virtual Container	
	..T50	..T50 GUN TACKER	100
<div style="border: 1px solid blue; padding: 1px; display: inline-block;">Lbl</div>	000585162	Pallet,Wood, Shipping	
<div style="border: 1px solid blue; padding: 1px; display: inline-block;">Lbl</div>	.000585161	.Virtual Container	
	..T50RED-6	..T50RED MANUAL STAPLE AND	100

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

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

Picking Detail of what was picked

Reprint of Documents

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NOTES:

Done

Internet

115%

# Enhanced Packing on RF Device

```
Session A - [24 x 80]
File Edit View Communication Actions Window Help

DD/DD/DD TT:TT:TT

1. Pick/Verify
2. Pack Items
3. Pack Containers
4. Ship Addr Labels
5. Serial# Maint.

8. ISL Processing
9. RF Inv Trans

99. Signoff
   Option: BB
```

```
Session C - [24 x 80]
File Edit View Communication Actions Window Help

DD/DD/DD TT:TT:TT
Pick List 6666666

Item Container Type
      _____
Item Container ID
      _____

Holding Cntnr Type
      _____
Holding Cntnr ID
      _____

F2=Rtn F3=Ext
F4=ItmCnt F5=HldCnt
```



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INTERFACE**

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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



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**ASN AND/OR E-MAIL TO  
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BOXES/CONTAINERS**



# Shipment Notification via eMail

Shipment Notification, Order 11540 - Message (HTML)

Message

Reply Reply to All Forward  
Respond

Delete Move to Folder Create Rule Other Actions  
Actions

Block Sender Not Junk  
Junk E-mail

Categorize Follow Up Mark as Unread  
Options


Find Related Select  
Find

Send to OneNote  
OneNote

From: Ben McCormick  
To: Ben McCormick  
Cc:  
Subject: Shipment Notification, Order 11540

Sent: Mon 4/2/2012 12:49 PM

**From:** Cistech Product Support [<mailto:ProductSupport@Cistech.net>]  
**Sent:** Thursday, January 06, 2011 6:26 AM  
**To:** Judi Curlee  
**Subject:** Shipment Notification, Order 11540

  
**CISTECH**  
The MAPICS Experts

Dear Judi,  
Greetings  
We thought you'd like to know that we shipped your order.

Tracking #: 1Z2197040373914930  
Order#: 11540  
Ship Date: 1/06/11  
PO Number: PO# 11540  
Carrier: UPS

If your tracking# is USPS, UPS, Fedex, or DHL/AirBorne, you can track your order  
at <http://boxoh.com/?t=1Z2197040373914930>

12:48 PM

# 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!***

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**OPTIONAL: PACK  
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# Customer Portal

Launch

Open Orders

Order Shipments

Shipped Items

Order Shipments

Order Shipments

General

Order	Purchase order	Shipment date	Invoice	Pro bill number	Carrier ID	Ship-to address 1	Ship-to city	Ship-to state	Backordered items
CO 11519		08/24/2010	0		UPS	8725 West Avenue	Houston	TX	No
CO 11511		07/13/2010	0	12010001274	UPS	8725 West Avenue	Houston	TX	No
CO 11500	Serial#/Return	05/11/2010	1,048		UPS	8725 West Avenue	Houston	TX	No
CO 11454	Goodman	12/15/2008	1,047		UPS	8725 West Avenue	Houston	TX	No
CO 11327	%freight	01/16/2009	910		UPS	8725 West Avenue	Houston	TX	No
CO 11249	vt6	12/08/2008	909		UPS	8725 West Avenue	Houston	TX	No

Launch

Order Shipments

Order Shipment

Shipped Item

Item: 1000

Open Orders

Order Shipments

Shipped Items

Training - Customer Orders and Quotes

General

Order11511

Shipment number1.104

Customer item

Customer item description

Item1000

Item descriptionPC, 166 MHZ, DESKTOP

Extended weight50

CarrierUPS

BOL#0

Invoice#0

Packing List#0

Pro bill#12010001274

Ship-toAmerican Computing

8725 West Avenue

Houston

TX

77001

Quantities and Dates

Ordered5

Order UomEA

Shipped5

Stocking UomEA

Backordered0

Ship DateTue, Jul. 13, 2010

Pricing

Selling price400

**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!**

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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!*

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# Advanced Customer Order Fulfillment for XA

***THANK YOU!***

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