

## ***Whole House Management Process***

1. Make copies of ticket shippers
  - a. Email copies to appropriate salesperson
  - b. Save copies to desktop
  - c. Give/send hard copies to appropriate salesperson
  
2. Look at tickets scheduled for next business day
  - a. Track any remaining open transfer requests for items on those tickets
    - i. Check dock for items that have come in
    - ii. Receive transfers if needed
    - iii. Will call item with order
  - b. Make sure orders will be sent out complete
    - i. Re-notify salesperson if items you were expecting via a transfer request were cancelled and will not be going out with order
  - c. Check other transfer requests sent for the rest of the picked orders
  
3. Unlock any tickets which salesperson has requested to make changes to
  - Go to header of ticket
  - (T)
  - (Y)es
  - Enter password
  - a. Request a list of changes via email to confirm all changes that were made
    - i. Line #
    - ii. Quantity
    - iii. Part #
  - b. Request to be notified when salesperson is done making changes
  - c. Re-lock ticket
    - Label or Pick List Print
    - Lock Ticket
    - i. If you are unable to lock ticket via "Lock Ticket"
      - Label or Pick List Print
      - Pick List for Warehouse
      - Print to LPT or to Comet screen #
  
4. Reprint labels for add on's to tickets
  - a. Item added at end of ticket, so printing labels for anything not will called
    - Label or Pick List Print
    - Pick Labels for Warehouse
  - b. Lost a label or doesn't match
    - Label or Pick List Print
    - Specific Label
  - c. Pull any items which were removed from order and put back into stock
  - d. Pull items which were added and will call with the rest of the order
  - e. Send transfers for items not in branch 5 stock

- f. Notify salesperson if there was an inventory discrepancy & need to reorder or requesting from another branch
  - i. Make sure they are aware if it is possible we might not send the order out complete
5. Review pulled picked lists (top left bin). Labels for items which were not pulled with the order will be paper-clipped to the pick list
  - a. Verify that each item marked with an "x" on pick list which identify as not pulled for order, has a corresponding sticker
    - i. Making sure pick list & stickers show not having the same quantity of items
  - b. Attempt to find items which there is a label for and shows in branch 5 stock
    - i. Any items we do not have need to be cycle counted out of inventory
      - Attempt to transfer item from another branch if branch 5 doesn't have
    - ii. On an mass scale, i.e. show 17 in stock with 15 committed and we have 0, Tim Artan needs to also attempt to locate and purchasing needs to be notified to add items to PO for committed tickets
      - (Discover why we have such a large discrepancy, in this case they were added at physical inventory by mistake)
  - c. Make any transfers needed and available to fulfill order
    - i. If we cannot complete the pick on the day it was pulled the salesperson **MUST** be emailed that day even if items may be able to be transferred in and/or come in on a PO in the 2 week period before the shipping date
      - This ensures that if the item isn't really at another branch or does not arrive in time on a PO the salesperson has ample time to make a change with the customer if needed prior to the delivery date
        - Proper notification includes:
          - a. Ticket # and Lot / Subdivision in the subject of the email
          - b. Line #
          - c. Item #
          - d. Room location
6. Check delivery schedules for builders that are available for online viewing
  - a. Pulte: Checked on Monday
    - i. <https://bwp.pulte.com/Account/Login?msg=Your%20Username%20%26%20Password%20are%20incorrect.%20Please%20use%20the%20Forgot%20Password%20link%20below%20if%20you%20need%20assistance>
    - ii. Username: christynalley@metroelectricsupply.com
    - iii. Password: Metrolighting!

**Work Between**  
 07/17/2017 to 08/17/2017  
 (Default Schedule Date Range: -10 to 45 days)

**Subdivision**  
 Bur Oaks - 5726 (63005)

**Address**  
 926 Silver Buck Lane  
 Chesterfield, MO 63005  
 Garage Swing Left

**Lot #**  
 5726-00016

63872 - Meadowview  
 Elevation Prairie (PR2G)  
 2058.300.00  
 James Harris (314) 486-1727  
 02/09/2017 7:46 AM 08/30/2017

**Task Description**  
 (T3) Deliver Light Fixtures (1+1F)  
 Non-Critical

**Subdivision**  
 Electric Fixtures - Material (21712)

**Delivery Date**  
 07/28/2017 Tier 3 +2d  
 07/14/2017 8:16 AM

**Subdivision**  
 Heritage at Hawk Ridge II - 5582 (63367)

**Address**  
 324 MYNA DR  
 Lake St. Louis, MO 63367  
 Garage Swing Left

**Lot #**  
 5582-60900

61935 - Ascend  
 Elevation 8 w/Loft and Bed/Bath  
 1992.300.00  
 Jay VanDerBeck 972-872-1815  
 07/13/2017 10:02 AM 09/13/2017

**Task Description**  
 (T3) Deliver Light Fixtures (1+1F)  
 Non-Critical

**Subdivision**  
 Electric Fixtures - Material (21712)

**Delivery Date**  
 08/10/2017 Tier 3 +2d  
 06/07/2017 8:50 AM

- b. Consort: Checked on Wednesday
  - i. <https://tjcbuilder.builderportal.net/Login>
  - ii. Username: christynalley@metroelectricsupply.com
  - iii. Password: metro1

Supplier Schedule

**Builder** Builder Portal - Consort Homes, LLC - 46 - Christy Nailey

Supplier Schedule Filter: ( | Area: 'Carlton Glen' | Activity: 'Deliver Light Fixtures' | Crew: 'Not Assigned' | Start Date: 7/19/2017 | End Date: 8/3/2017 | Dates: Scheduled)

Action	Activity (/Builder...)	Schedule...	Area (/Builde...)	Job Number (...)	Block (/Build...	Lot (/Builder...	Start (/Buide...	Finish (/Build...	Site Address (/B...	City (/Builder...	Post Cod...
Area: Carlton Glen	Deliver Light Fixtures	Scheduled	Carlton Glen	90163071	WALKOUT	3071	8/2/2017	8/2/2017	715 DERBY WAY DRIVE	WENTZVILLE	63385
	Deliver Light Fixtures	Scheduled	Carlton Glen	90163183	I	3183	7/27/2017	7/27/2017	813 CASPIAN DRIVE	WENTZVILLE	63385
	Deliver Light Fixtures	Scheduled	Carlton Glen	90164112	INGRADE	4112	7/24/2017	7/24/2017	112 CARLTON POINT DRIVE	WENTZVILLE	63385

Save changes Cancel changes

- c. Payne: Checked on Wednesday
  - i. <https://pfh.builderportal.net/Login>
  - ii. Username: Jasonciluffo@metroelectricsupply.com
  - iii. Password: metro1

(/BuilderPortal)

Supplier Schedule

Subdivision

Lot #

Delivery Date

Address

Filter: ( | Crew : 'Not Assigned' | Start Date: 7/19/2017 | End Date: 8/20/2017 | Date

List View Calendar Gantt View

Drag a column header and drop it here to group by that column

Action	Activity (/Bu...	Schedule ...	Area (/Builde...	Job Number (...	Block (/Build...	Lot (/Builder...	Start (/Buil...	Finish (/Build...	Site Address (/B...	City (/Builder...	Post Cod...
Electric Fixtures	Scheduled	Brookside	4100008	00	008	7/21/2017	7/21/2017	52 Frosty Brook Court	O'Fallon	63366	
Electric Fixtures	Scheduled	Konert Lake Estates	3500003	00	003	7/21/2017	7/21/2017	1026 Konert Lake Drive	Fenton	63026	
Electric Fixtures	Scheduled	Ashford Knoll	4500046	00	046	7/25/2017	7/25/2017	905 Finberry Grove Court	Cottleville	63304	
Electric Fixtures	Scheduled	Main Street Crossing	470B094	0B	094	7/25/2017	7/25/2017	2550 Kilare Lane	Wildwood	63040	

a. McBride: Online Access TBD

i. Currently each Job Superintendent emails their subdivision schedules on Thursday



Subdivision

Charlestowne

LOT	MON- 7/24	TUES- 7/25	WED- 7/26	THUR- 7/27	FRI- 7/28	*NOTES	EXTENDED SCHEDULE
155 14 3376 Charles Cr Dr 17-1128 SOLD/SPEC	PAA	PAA	PAA	PAA	RE-CLEAN	DELIVERIES 4/10 - 4/22	CLOSE 7-31  WALK 7/18 @ 12PM CLOSE 7/31 @ 9AM
159 14 3360 Charles Cr Dr 17-1700 SOLD	WALK 9AM	TAPER STICKERS	PAINTER STICKERS AM ----- RECLEAN PM	CLOSE 9AM		DELIVERIES 4/20 - 7/3	WALK 7-24 TAPER STICKERS 7-25 PAINTER STICKERS 7-26 AM 7:30PM CLOSE 7-27  WALK 7/24 @ 9AM CLOSE 7/27 @ 9AM
201 14 3344 Bentwater Pl 17-1304 SOLD/SPEC	POWERWASH PUNCH	PUNCH	WALK 1PM	TAPER STICKERS	PAINTER STICKERS AM RECLEAN PM	DELIVERIES	CLOSE 7-31  WALK 7/28 @ 1PM CLOSE 7/31 @ 11AM
190 14 3365 Charles Cr Dr 17-1305 SOLD/SPEC	PUNCH	PUNCH	PUNCH	PUNCH	PUNCH	DELIVERIES 4/11 - 6/23	POWERWASH 7-31 WALK 8-1 TAPER STICKERS 8-2 PAINTER STICKERS 8-3 AM 8-3 PM 8-4  WALK 8/1 @ 9AM CLOSE 8/4 @ 9AM
150 14 3396 Charles Cr Dr 17-1581 SOLD/SPEC	ENAMEL SPRAY DEL: APPLIANCE	MECH FINISH	MECH FINISH	MECH FINISH	CARPET	DELIVERIES 4/24 - 7/7  *APPLIANCE 7-24	C-PUNCH/TAPE WALK 8-1 CONST CLEAN 8-2 BACKROLL 8-3 GUTTERS / SCREENS 8-3 POWERWASH 8-10 WALK 8-11 TAPER STICKERS 8-14 PAINTER STICKERS 8-15 RECLEAN 8-16 PM CLOSE 8-17  WALK 8/11 @ 9AM CLOSE 8/17 @ 9AM
91 56B 8'-IG 3457 Harbor Cr Dr 17-1963 SOLD	TRIM MARBLE	TRIM	TRIM	CAULK & PUTTY	ENAMEL SPRAY DEL: LIGHTS DEL: APPLIANCE	DELIVERIES  LIGHTS - 7/27 *APPLIANCE 7/27 *FRIDGE 8/9	MECH FINISH 7-31 CARPET 8-2 C-PUNCH/TAPER WALK 8-4 LOG SET 8-4 CONST CLEAN 8-7 BACKROLL 8-9 GUTTERS / SCREENS 8-8 POWERWASH 8-10 WALK 8-11 TAPER STICKERS 8-14 PAINTER STICKERS 8-15 AM RECLEAN 8-15 PM CLOSE 8-16  WALK 8/11 @ 12PM CLOSE 8/16 @ 1PM
88 91D 8'-IG 3469 Harbor Cr Dr 17-2086 SOLD	TAPE D6 SAND	SCRAPE-SWEEP AM INTERIOR SPRAY PM DEL: TRIM DEL: STAIR	HARD FLOOR DEL: CABINET	HARD FLOOR	TRIM	DELIVERIES  110M 7-25 CABINET 7-26 STAIR 7-25 LIGHTS 8-8 *APPLIANCE 8-4	MARBLE 8-1 C-PEN/ENGL 8-4 MECH FINISH 8-8 CARPET 8-11 C-PUNCH/TAPER WALK 8-15 CONST CLEAN 8-16 BACKROLL 8-17 GUTTERS / SCREENS 8-17 POWERWASH 8-10 WALK 8-12 TAPER STICKERS 8-23 PM PAINTER STICKERS 8-23 RECLEAN 8-24 PM CLOSE 8-25  WALK 8/22 @ 9AM CLOSE 8/25 @ 9AM

Lot #

Address

Delivery Date

7. Compare current delivery schedule:

- a. In delivery book (on desk)
- b. In ticket header (in Comet)
- c. On delivery maintenance sheets (printed & on right side table)

8. If not currently scheduled:

- a. Locate a ticket #
  - i. If no ticket, add to "No Ticket List" Spreadsheet
  - ii. If there is a ticket, add a delivery date in the ticket header
    - Delivery Maintenance
    - Delivery Book Maintenance
    - Enter Branch #
    - Enter Shipping Branch (defaults to branch 5)
    - Enter Delivery Date
    - (S)chedule
    - (A)dd
    - Enter Ticket #
    - Confirm Delivery Date
    - (Y)es
  - iii. Double check the ticket header to confirm the date was entered correctly on the correct ticket
  - iv. Add to the delivery book (on desk)

9. If already scheduled but delivery date has changed:

- Delivery Maintenance
- Delivery Book Maintenance
- Enter Branch #
- Enter Shipping Branch (defaults to branch 5)
- Enter Delivery Date
- (S)chedule
- (R)emove

\*\*\*then follow steps to re-add with new delivery date\*\*\*

10. Verify if ticket requires PO that the PO amount and the order total match, if they don't add to the "Need PO / Balance Paid" Spreadsheet

- a. Benton Homebuilders- 12525
- b. Consort Homes- 24012
- c. Fischer & Frichtel- 34993
- d. Hughes Custom Homes- 46306
- e. Innsbrook- 45764
- f. Jones Co- 50477
- g. Lombardo Homes- 45996
- h. McBride & Sons- 59076
- i. Meadowbrook Dev-59761
- j. Payne Family Homes- 69700
- k. Rowles Co- 76325

11. Repeat Step 2. Look at tickets scheduled for tomorrow
  - a. Track any remaining open transfer requests for items on those tickets
    - i. Check dock for items that have come in
    - ii. Receive transfers if needed
    - iii. Will call item with order
  - b. Make sure orders will be sent out complete
    - i. Re-notify salesperson if items you were expecting via a transfer request were cancelled and will not be going out with order
  - c. Check other transfer requests sent for the rest of the picked orders
  
12. Route deliveries for following business day
  - a. Look to verify address is on ticket
    - i. If unable to pull up online check the builder website for subdivision location
    - ii. If unable to locate on builder site, contact salesperson for address
    - iii. If salesperson is not available, contact the job super for address
  - b. Map out whole houses and other scheduled deliveries between 2 drivers
    - i. Optimize deliveries & routes for efficiency
  
13. Repeat Step 5. Review pulled picked lists (top left bin). Labels for items which were not pulled with the order will be paper-clipped to the pick list
  - a. Verify that each item marked with an "x" on pick list which identify as not pulled for order, has a corresponding sticker
    - i. Making sure pick list & stickers show not having the same quantity of items
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      - This ensures that if the item isn't really at another branch or does not arrive in time on a PO the salesperson has ample time to make a change with the customer if needed prior to the delivery date
        - Proper notification includes:
          - a. Ticket # and Lot / Subdivision in the subject of the email
          - b. Line #
          - c. Item #
          - d. Room location
  
14. Perform 3<sup>rd</sup> check on orders being picked

15. Print Delivery Maintenance Book for the next business day

- Delivery Maintenance
- Tickets to be Delivered
- Selling Branch: ALL
- Shipping Branch: 5
- Enter Delivery Date
- Enter Printer #

16. Print pick lists for orders to be picked for the next business day

- Label or Pick List Print
- Pick List for Warehouse
- Enter Customer #
- Enter Ticket #
- Enter Delivery Date
- Enter Printer #

- a. Compare pick lists with the delivery book maintenance sheets & verify match

17. Repeat Step 10. Verify if ticket requires PO that the PO amount and the order total match, if they don't add to the "Need PO / Balance Paid" list

- a. Benton Homebuilders- 12525
- b. Consort Homes- 24012
- c. Fischer & Frichtel- 34993
- d. Hughes Custom Homes- 46306
- e. Innsbrook- 45764
- f. Jones Co- 50477
- g. Lombardo Homes- 45996
- h. McBride & Sons- 59076
- i. Meadowbrook Dev-59761
- j. Payne Family Homes- 69700
- k. Rowles Co- 76325

18. Once delivery maintenance sheets have been completed, add to stack on right side table

*\*\*\*If warehouse is ahead of schedule and complete pulling mid day, print the next day's Delivery Maintenance Sheet & Pick Lists\*\*\**