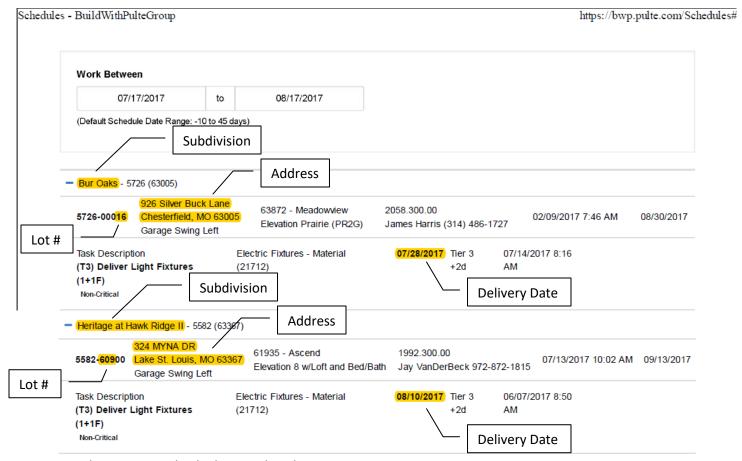
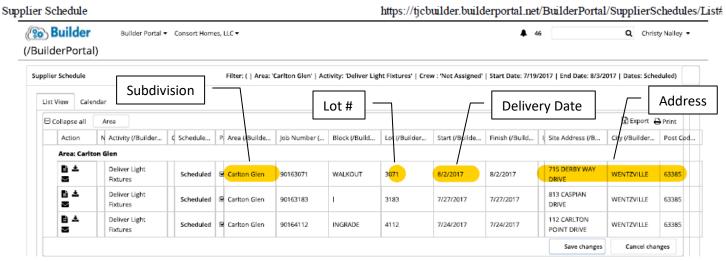
Whole House Management Process

- 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

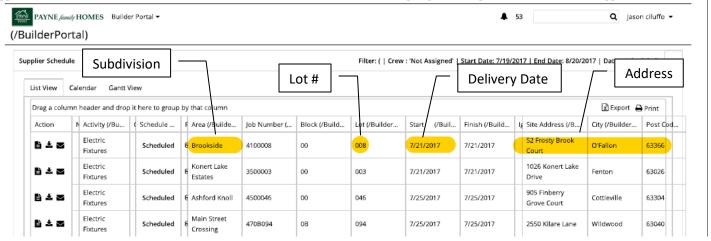
- f. Notify salesperson if there was an inventory discrepancy & need to reorder or requesting from another branch
 - i. Make sure they are aware if it is possible we might not send the order out complete
- 5. Review pulled picked lists (top left bin). Labels for items which were not pulled with the order will be paperclipped 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
 - 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%20link%20below%20if%20you%20incorrect.%20Please%20use%20the%20Forgot%20Password%20link%20below%20if%20you%20need%20assistance
 - ii. Username: christynalley@metroelectricsupply.com
 - iii. Password: Metrolighting!



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



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



- a. McBride: Online Access TBD
 - i. Currently each Job Superintendent emails their subdivision schedules on Thursday

MCBRID * 50% HOME	Ē S				L	Subdivision	Charlestowne
LOT	MON- 7/24	TUES- 7/25	WED- 7/26	THUR- 7/27	FRI- 7/28	*NOTES	EXTENDED SCHEDULE
155	PAA	PAA	PAA	PAA	RE-CLEAN	DELIVERIES 4/10 - 6/22	CLOSE 7-31
14 3376 Charles Cr Dr 17-1128 SOL D/SPEC							WALK 7/18 @ 12PM CLOSE 7/31 @ 9AM
159	WALK 9AM	TAPER STICKERS	PAINTER STCKERS AM	CLOSE 9AM		4/20 - 7/3	NALK 7-24 TAPER STICKERS 7-25 ANN RECLEAN RECLEAN
14 3360 Charles Cr Dr 17-1700 SOLD			RECLEAN PM			7	NAME OF THE PROPERTY OF THE PR
201	POWERWASH PUNCH	PUNCH	WALK 1PM	TAPER STICKERS	PAINTER STCKERS	DELIVERIES	SLOSE 7-31
14 3344 Bentwater PI 17-1304 SOLD-SPEC					RECLEAN PM		WALK 7/26 @ 1PM CLOSE 7/31 @ 11AM
190	PUNCH	PUNCH	PUNCH	PUNCH	PUNCH	4/11 - 6/23	POWERWASH 7-31 NALK 9-1
14 3365 Charles Cr Dr 17-1305 SOLD/SPEC							TAPER STICKERS 8-2 **ANTER STICKERS 8-3 AM RECLEAN 6-3 PM CLOSE **WALK 8/1 @ 9AM CLOSE 8/4 @ 9AM
150	ENAMEL SPRAY DEL; APPLIANCE	MECH FINISH	MECH FINISH	MECH FINISH	CARPET	4/24 - 7/7	C-PUNCH/TAPE WALK 9-1 CONSTICLEAN 9-2 BACKROLL 9-3 SUTTERS / SCREENS 9-3 POWERWASH 9-7 WALK 9-11 TAPER STICKERS 9-14 PANTER STICKERS 9-15 RECLEAN 9-16 PM
14 3396 Charles Cr Dr 17-1581						*APPLIANCE 7-24	CLOSE 8-17
SOLD/SPEC 91	TRIM MARBLE	TRIM	TRIM	CAULK & PUTTY	ENAMEL SPRAY DEL: LIGHTS	L DELITERATE L	WALK 8/11 @ 9AM CLOSE 8/17 @ 9AM MECH FINISH 7-31 CARPET 8-2 C-PUNCHTAPER WALK 8-4 LOG SET 8-4 CONST CLEAN 8-7 BACKROLL 8-8
55B 8'-IG 3457 Harbor Cr Dr 17-1963	MANDEL				DEL; APPLIANCE	LIGHTS - 7-27	GUTTERS / SCREENS 8-8 POWERWASH 8-10 WALK 8-11 TAPER STICKERS 8-14 PAINTER STICKERS 8-15 AM RECLEAN 8-15 PM CLOSE 9-16
88 91D 9'-IG	TAPE D6 SAND	SCRAPE-SWEEP AM INTERIOR SPRAY PM	HARD FLOOR DEL; CABINET	HARD FLOOR	TRIM	DELIVERIES TRIM 7-25	WALK 8/11 @ 12PM CLOSE 8/16 @ 1PM MARKE 8-1 CAPPET 9-11 C- PUNCHTAPER MAIK 8-15 CONST CLEAN 8-16 BACKROLL 8-1 SUTTERS / SCREENS 9-17 POWERWASH 8-10 WALK 8-12 TAPER STÜCKERS 9-22 PM PANTER STÜCKERS 9-23
3469 Harbor Cr Dr 17-2086 SOLD		DEL; TRIM STAIR					RECLEAN 8-24 PM CLOSE 8-25 WALK 8/22 @ 9AM CLOSE 8/25 @ 9AM
	Add	lress	Γ	Delivery Da	ate /		

- 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
 - 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
 - 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
- 14. Perform 3rd 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