



PCSTrac User Scenario

Finalizing OS&D
Missy

Scenario: Reconcile Inbounding Exceptions before Finalizing Trailer

Background

Missy is just back from lunch and would like to continue processing trailers that have been “inbanded” in the morning. Workers have been “dropping” their scanners as they complete each trailer. Scanner information is automatically updated into PCSTrac so when Missy begins, everything is ready and up to date in the system. At her facility, PCSTrac has been setup to automatically finalize trailers when the cartons scanned match the ASN cartons within a certain number of cartons.

Using PCSTrac

1. **Status of Inbanded Trailers** - Missy clicks on the PCSTrac application window already open to the *Inbound* screen. From *Inbound* she clicks through to the *Trailers* screen to view the status of all trailers currently “in process.” In this overview list, Missy is able to see trailers in various stages of Inbounding such as *Not Arrived*, *Not Started*, *Linked to Scanners*, *Scanning Cartons*, and so on. She notices that three of the trailers have been marked as *Auto Finalized*. She uses her mouse to hover over the status; a tool tip confirms that there is nothing she needs to do with these trailers, they have been reconciled and receipt confirmations have been sent back to the respective retailer(s). Information on these trailers will be automatically archived tomorrow and no longer viewable in the *Inbound->Trailers* view.
2. **Exception Process, Shorts** – Missy notices that one of the trailers status reads *Missing Cartons*, which she knows means that she needs to have someone try and locate these cartons in the warehouse. She also notices that the *Manual Finalize* link has an alert icon, numbered (3), that indicates to her that there are three trailers in total that needs her attention. Missy knows from training that by the end of her shift, there should be no alerts.

From the *Trailers* screen, Missy could view the individual *Trailer* detail screen, or, she could click the *Manual Finalize* link to filter her view to see only trailers that need to be processed manually. Missy clicks to view the individual *Trailer* screen. In addition to more details about the trailer, she has a few carton-level options such as *Find Cartons*, *Add Carton(s)*, and *Mark Damaged*. There is also a trailer level primary action button that says *Finalize*. Missy clicks *Find Cartons* and is taken through the *Find Cartons* modal screen process:

- a. **Options** - The first screen asks Missy in plain language if she wants to; a) setup a scanner to go find the missing cartons, b) only print a report of the missing cartons, or c) I would

PCSTrac User Scenario

like to categorize shorts and finalize this trailer. Missy was told that she should make at least one attempt to find missing cartons, so she chooses the (currently default) option “a”, to set up a scanner to go find the cartons.

- b. Trailer to Scanner - The second screen is the *Trailer to Scanner* match screen, this allows Missy to match the trailer with a specific available scanner. The language tells her that once setup, the scanner will be set to only scan for the missing cartons.
- c. Confirmation & Print - The third and final screen confirms that the scanner should be put in the cradle—if it hasn’t already—to be synced. In addition, the option to “Print list of missing cartons,” it is selected by default. She leaves this selected.

When Missy clicks to complete the *Find Cartons* process, the list is printed and she is taken back to the *Trailer detail* screen. She sees that the status of the trailer has now been updated to *Finding Cartons*. This new status is also reflected in the overall *Trailers* list.

Next, Missy hands the warehouse worker the scanner to try and locate the cartons. Once completed, the worker re-drops the scanner and the information is updated. Sometimes, the worker is able to find all the missing cartons and the trailer is *Auto Finalized* without further action from Missy. However, this time there are still too many missing cartons. Missy clicks on *Find Cartons*, and once again has the option to try the scanning process, or, select to mark the cartons as “assumed received” to continue on and manually finalize the trailer. Since there has been a previous attempt to rescan, the option to finalize the trailers is now the default (recommended).

3. **Manual Finalize Process** – Missy chooses to mark the missing cartons “assumed received,” which takes her into the same *Mark Assumed Received* screen that she would see if she directly clicked to finalize a trailer from the trailer detail screen. The next screen(s) walk through a *Data Check* on the trailer information which shows alerts, and prompts Missy for updates or input as need by the retailer before a trailer can be finalized.

After passing the data check, Missy is shown a preview screen indicating that the trailer will be finalized and a confirmation report sent back to the retailer. Since all looks good, she clicks to Finalize. She is then taken back to the Trailer detail screen where the trailer she selected is now updated to *Manually Finalized*.

4. **Printing OS&D Report** – At the end of the day, as a separate process to finalizing trailers, Missy selects to print out the full OS&D reports for her boss. She navigated to *Inbound -> Trailers* and selects each of the trailers she wants a report for, selects *Print OS&D Report*, views printer setting options and selects to *print*.
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