Navigating the TC New Item Template

- The first step in the receiving process is to make sure we have the SKU's set up correctly in the system.
- Customers should be sending the TC new item template each time new items come in. There will be an occasion where you have to create them manually. So you will learn that as well.
- Let's start by navigating the Item template.

+ Please click the attached link below and at the top right corner click the cloud and download the file to open the spreadsheet. This spreadsheet can also be found on trello card "TC receipt templates/spreadsheets"

+ Please use Trouble shooting import templates link on "import template resources" card if any errors occur upon upload.

Column header 1 has the instructions for the customer letting them know blue fields are required, white are optional and red are not allowed.

> - **The red columns and white columns R through U are for TC associates to fill out.**
>
> - **If you hover over the column headers they will populate with details and instructions**

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1. Let's start with the Blue fields which are required for the customer to fill out

SKU (Column A): Typically this will be the customers own SKU they have in their system that may be linked to active listings on any giving selling platform. If we have API connections with this customer it would be important that our Primary SKU matches theirs so orders can flow in properly. In general, API connection or not, we want the primary SKU to be whatever the customer chooses as they will be creating orders themselves in the system. That being said, the customer's primary SKU might have no indication printed on the physical carton itself, which could be a problem when trying to verify a pick ticket. That is why we have 2 other fields "Description" and "Description2" to attach any other reference to this SKU.

Description (Column B): Again, customer will be filling this out but in either this field or the next field "Description2" we would want to at least put a value that corresponds to something that is printed on the master carton.

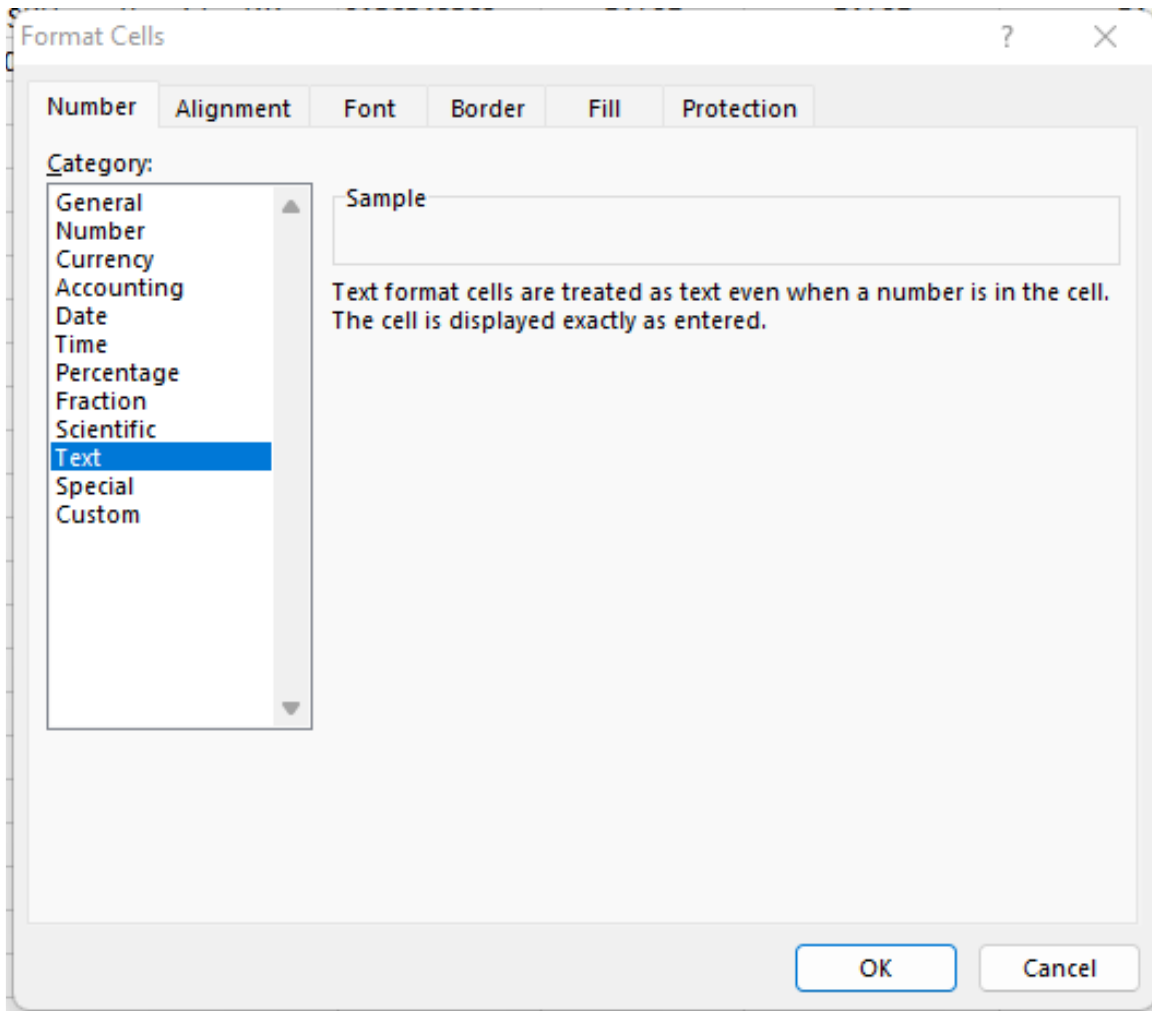**Quantity of Units per carton:** Customer should fill this field out.

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2. The White Columns are optional for our customers but we suggest customers fill this out as it is important to have this information should we ever need to create labels or shipments.

> - ****Please note that if a customer ever asks for weights or dimensions of a carton or UPC, please log it in 3PLC for the future.****

Description2 (Column C): Again, customer will be filling this out but in either this field or the next field "Description" we would want to at least put a value that corresponds to something that is printed on the master carton. Customers may also want to add any other identifier they have for the SKU such as an amazon FNSKU.

UPC (Column K): It is important to note that most errors happen because of a formatting issue related to the UPC. Please make sure this column is formatted as text. Click Column K to highlight the entire column and then right click→ Format cells→ Text.

Min QTY notify (Column D): Please note that if a customer provides this, they should have notifications setup under customers--->Customer notifies---->item minimum reached.

SKU	Description	Description2	UPC	Track Lot	Track Serial	Track ExpDate	Primary Unit of Measure
				Fields in BLUE are required, Fields in WHITE are optional, Fields in RED are prohibited			
5436781	Should contain something printed on box	FNSKU or other identifier	0156548562			FALSE	Unit
698954123	Black medium gloves 6602	X00345GH47	0156547565			FALSE	Unit

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   Hide
   Unhide

Format Cells

| Number | Alignment | Font | Border | Fill | Protection |

Category:

General
Number
Currency
Accounting
Date
Time
Percentage
Fraction
Scientific
Text
Special
Custom

Sample

Text format cells are treated as text even when a number is in the cell. The cell is displayed exactly as entered.

OK   Cancel

<u>3. All of the below fields are not filled out by our customers but are required for upload (Aside from last two columns AS and AT), hover over column headers for instructions.</u>

Weights and dimensions of packaging unit (cartons) (Columns R through U): This is a required field for upload, hover over column header. If a customer does not provide this information, we can enter 1 in all fields. Some customers request we do this upon receiving, which we can do if we bill them for it.

Track Lot/Exp/Serial (Columns L through N): Always enter False, unless requested by customer to track lot numbers, expiration dates, or serial numbers, in which case you would activate the sku to track any of the given columns by entering True.

Primary unit of Measure (Column O): This field will always be Unit or Each. We used to use Each but we have switched to Unit. This is the total amount of units in the Master carton or "packaging unit" which we talk about next. Even if the QTY per carton is 1, you can still track both the Unit and Carton it will just be the same number on a report.

Packaging unit (Column P): This is the master carton. This is how the system keep tracks of weight and dimensions of SKU's on the item level. It is important that we have the proper weights and dimensions of the <u>cartons </u>so that if we need to create shipping labels, the system can make the correct calculations when rate shopping. Side note: The system will divide the total number of units shipping by the master carton wright to get the weight of the shipment. If it is shipping in the master carton itself, you can hit recalculate package in smart parcel and the order will populate with the weight and dimensions of the packaging unit saved in the item setup (more on that in navigating Small parcel)

Require Lot/Exp/Serial (Columns Z through AE): These will always be FALSE, as we will never require these fields to be filled out upon creating a receipt. If the customer is tracking specific item details then we can require them in order to close a receipt by

entering TRUE. This may be a good idea so we never forget to input that information on a receipt...Again, this should only be activated if requested to track lot #'s, serial or exp dates.

4. The below two columns are not required for upload and you most likely will not have this information until you receive it. You can wait to create the items and upload the receipt together so that you can fill in the units per MU on the item level. Otherwise you can leave these columns blank.

Total Qty of units per MU (Column AS): In other words total QTY of units per pallet. Important to note this is total QTY of primary unit of measure. So please always make sure when entering pallet QTY on the item level that you are always entering total units, this means like you see in the example, the first SKU has 300 units per pallet (30 cartons of 10 per pallet)
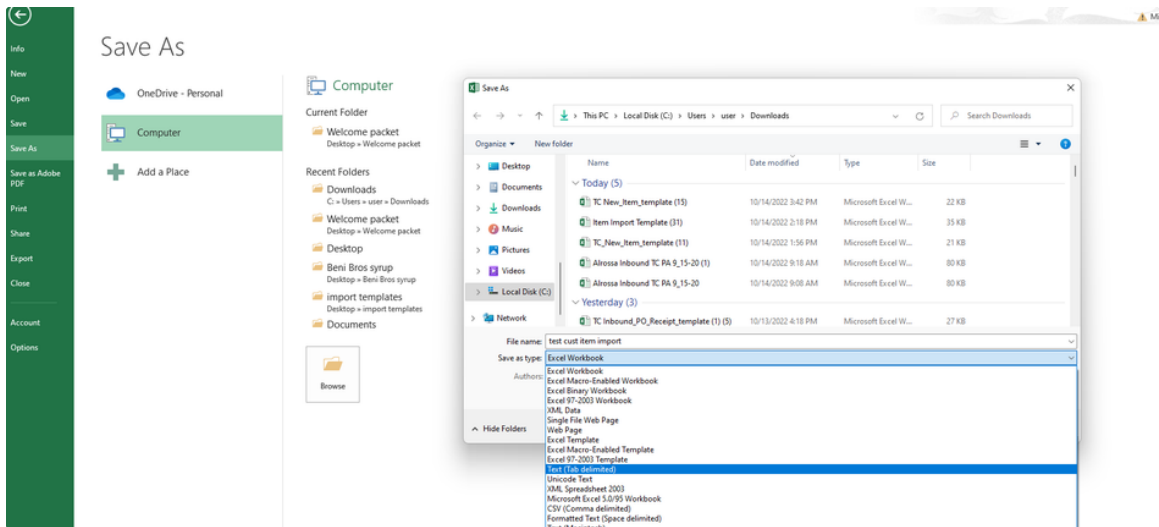
Unit Type (Column AT): Hover over the column header. If you go to Admin→Movable units you will see the defined movable units we have. Almost everything will be on "Pallet" with the occasional Over size pallet.

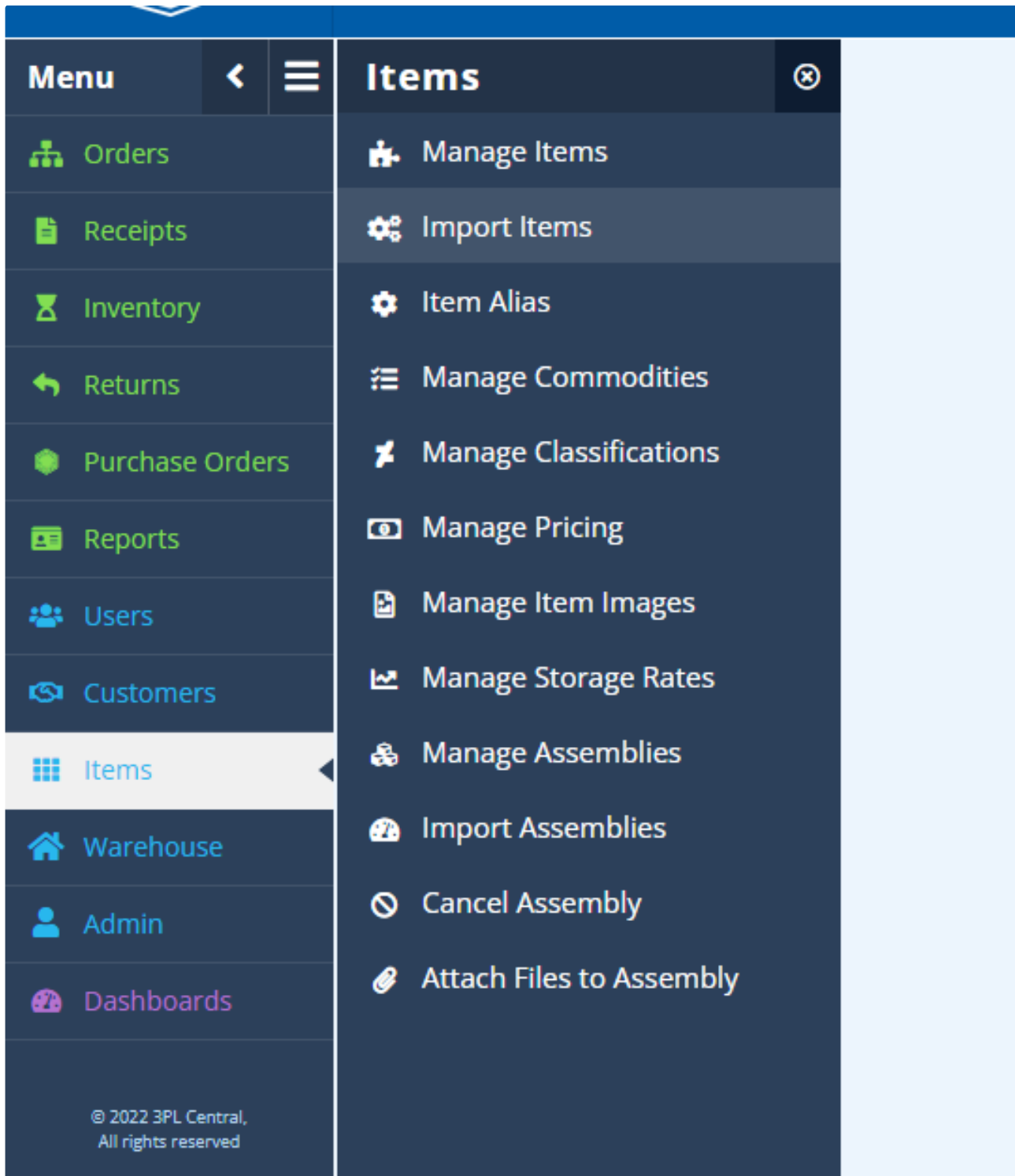## 5. TO UPLOAD PLEASE FOLLOW THE BELOW INSTRUCTIONS

1. Select the both column headers, right click and delete.
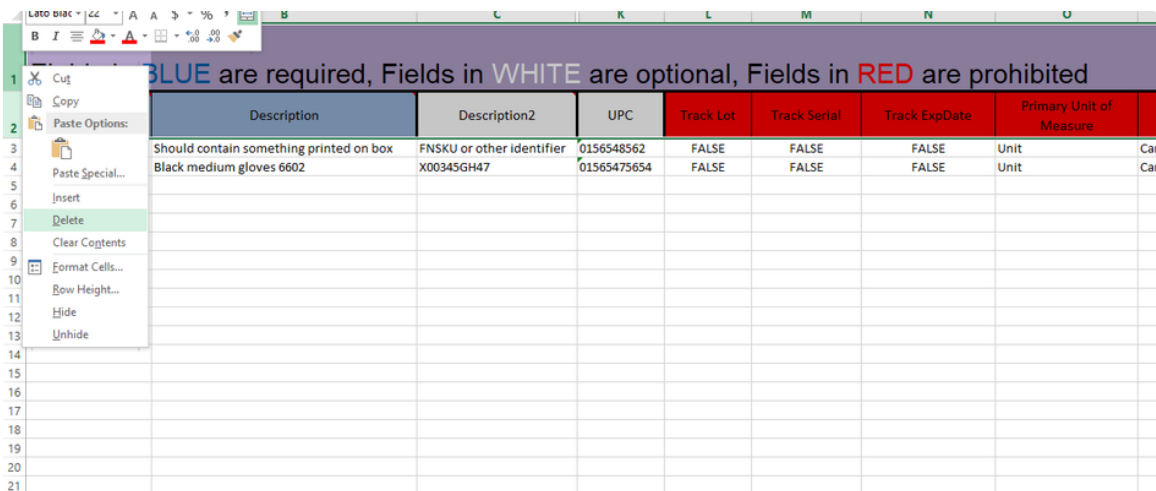
2. File save as Text (Tab delimited).

3. In 3PLC, select items-->import items.

4. Select the customer and choose the file to upload then select import items. Finally select create items.

Choose a Customer Test Customer ▼

Import File [Choose File] No file chosen

Dimensions and weight in the input file are ● US/Imperial ○ Metric

[Import Items]

Use the 'Browse...' button to select an item import file

Then press the 'Import Items' button to read the file.

Download information about import file format.

Items To Be Created

	SKU	DESC	EXISTSALREADY
1	5436781	Should contain something printed on...	yes
2	698954123	Black medium gloves 6602	yes

[Create Items]

After previewing the imported data for accuracy

Press the 'Create Items' button to create the new Items.

Data From Import File

```
Raw Lines---------------
5436781 Should contain something printed on box FNSKU or other identifier
698954123      Black medium gloves 6602       X00345GH47

Parsed Lines---------------
 SKU:5436781 Description:Should contain something printed on box Descriptic
 SKU:698954123 Description:Black medium gloves 6602 Description2:X00345GH47
```

Details of Items To Be Created

```
SKU: 5436781            ALREADYEXISTS
Description: Should contain something printed on box
Description2: FNSKU or other identifier
Min: 0
Max: 0
CycleCount: 0
```