

# DC Receiving

Training PPT

# DC Receiving Summary

## The Key Principles of Receiving:

- ✓ Warehouse Organization
  - ✓ Temperature Checks
  - ✓ Cold Chain Integrity
  - ✓ Invoice and Pallet Quantity Verification
  - ✓ Dating and Rotation
  - ✓ Correct Inventory Accounting – pricing and record of receipts/credits
- 
- Why are DC Receiving practices important?
    - DC Receiving procedures are vital to promote accurate inventory management, shrink prevention and customer satisfaction
    - Accurate receiving procedures will improve inventory management to ensure we are receiving all items for which we are being billed
    - Diligent receiving practices will provide our customers with quality product while minimizing the potential of inventory loss

# Toolkit

- Warehouse Organization SOP
- Load Audit in Go Spot Check Application
- WTS Report
- Authorization for Return Form
- Banana Color Guide
- Delivery Paperwork
- Dunnage Form
- Pallet Verification Form (Delivery Manifest)
- Powered Pallet Jack
- Printed Invoice
- Blue / Black Pen
- Infrared Thermometer
- Probe Thermometer
- Current Ad
- Black Permanent Marker
- Red Permanent Marker

## Reference Material in the Document Repository

- Credit Memo Log
- Fresh Meat Dating Calendar
- Go Spot Check User Guide
- SAL Browser User Guide
  - eInvoices – pg. 58
  - WTS Report – pg. 246

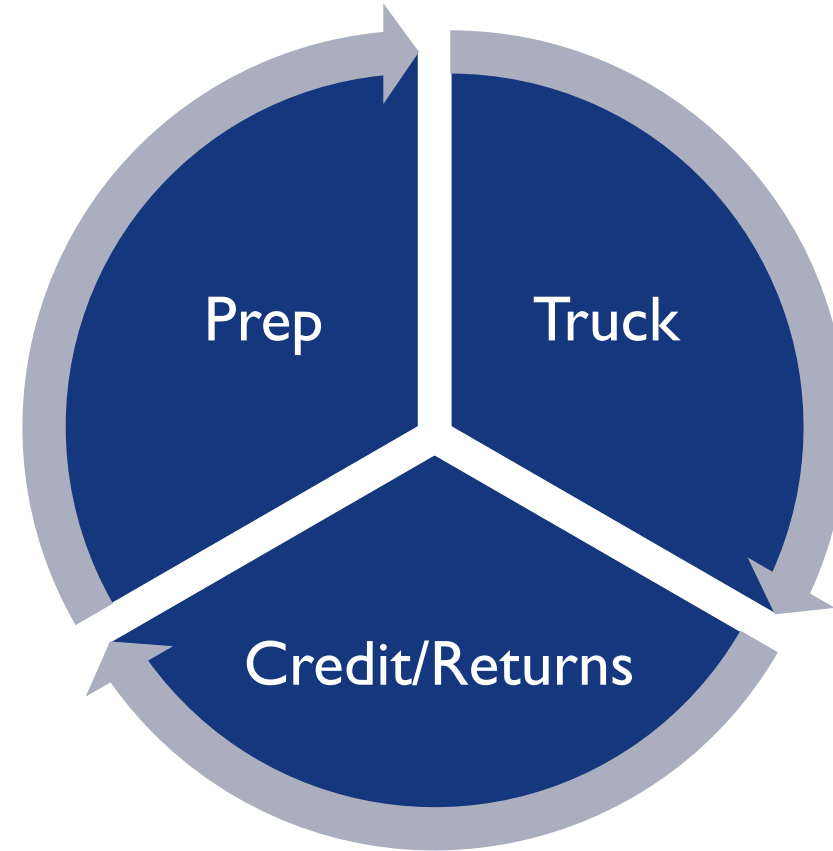
# DC Receiving Cycle

## 1. Non-Truck Day Preparation

## 2. Truck Day Activities

- Prior to Delivery
- Arrival of Delivery
- Unloading
- After Unloading

## 3. Credit and Returns Process



# Non-Truck Day Preparation

# Preparation

- Non-truck days are just as important as a delivery day; this is when stores can work all backstock and get the backroom prepared for the next load

Preparation tasks to complete before a scheduled delivery are as follows:

- ✓ Organize grocery backstock area, coolers and freezers
  - Review sales floor product levels
  - Work back room stock to the sales floor as needed
  - Organize coolers and freezers prior to delivery to ensure efficiency of unloading temperature-controlled products from the truck
  - Refer to Warehouse Organization SOP for more information
- ✓ Charge Powered Pallet Jack
- ✓ Cleaning of the Warehouse & Sales Floor
  - Complete a detailed cleaning/sweeping of the warehouse, sales floor, and shelving prior to receiving new inventory

# Preparation

- ✓ Prepare dunnage for pickup using safe material handling and lifting practices (ask for assistance if needed)
  - Neatly stack pallets by type
    - Chep (blue) – 9 to 14 Pallets per Stack
    - Peco (red) – 9 to 14 Pallets per Stack
    - White Wood (standard) – 11 to 17 Pallets per Stack
    - IGPS (black) – 9 to 14 Pallets per Stack
    - Plastic Pallets (black) – 13 to 26 Pallets Per Stack
  - Stack empty milk crates on a plastic pallet and shrink wrap to ensure stability of the load (Max of 54 crates – 9 stacks, 6 per stack)
  - Create a bale of cardboard if baler is full
  - Organize empty ice cream bins, cardboard bales, plastic and banana blankets near the back door

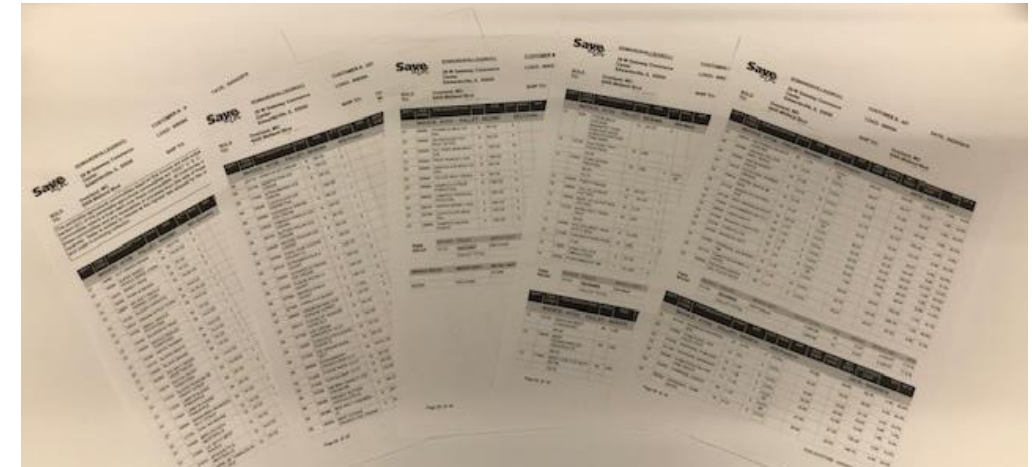



# Truck Day Activities



# Prior To Delivery – Print Invoice

- Print Invoice
- Separate by Category
  - Grocery (001)
  - Frozen (002)
  - Cooler (003)
  - Meat (004)
  - Produce (005)
- Ensure delivery date is correct
- Each section of the invoice (Grocery, Frozen, Cooler, Meat, Produce) should be printed to allow for check in of each category
- It's best to provide invoice paperwork per pallet to the team member who is currently working that particular pallet so they can easily verify any noticeable discrepancies



**Save a lot** EDWARDSVILLE(GROC)  CUSTOMER #: 427 DATE: 04/24/2019

29 W Gateway Commerce Center  
Edwardsville, IL 62025

LOAD: 509394

SOLD TO: Overland, MO  
9430 Midland Blvd


SHIP TO: Overland, MO  
9430 Midland Blvd

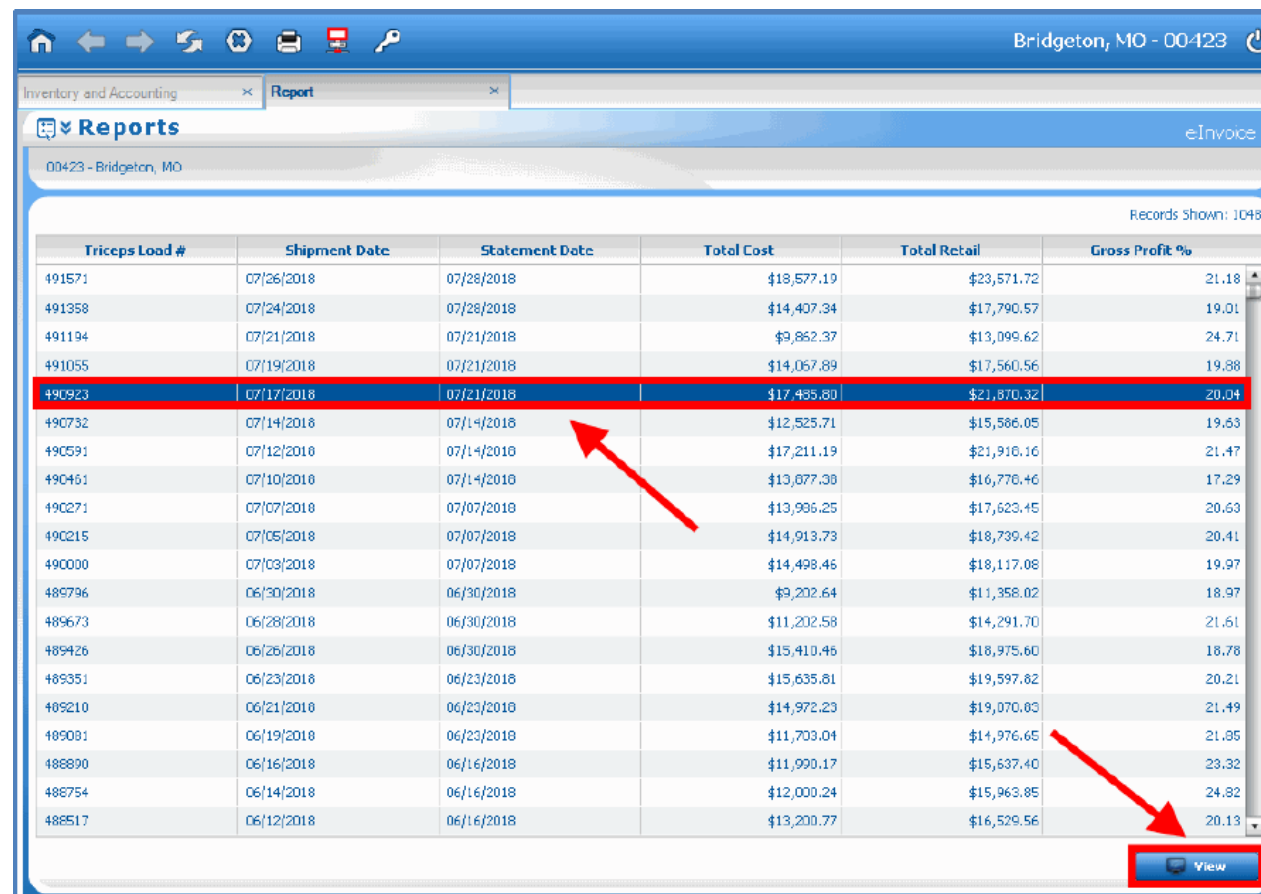
The perishable agricultural commodities listed on this invoice are sold subject to the statutory trust authorized by section 5(C) of the perishable agricultural commodities act 1930(7 U. S. C. 499(E) (C)). The seller of these commodities retains a trust claim over these commodities, all inventories of food or other products derived from these commodities and any receivables or proceeds from the sale of these commodities until full payment is received. Seller is entitled to interest at the highest rate allowed by law on delinquent amounts and attorney fees and costs in pursuing collection.

DEPT	ITEM CODE	ITEM DESCRIPTION	PACK	SIZE	QTY	MISC	AMT	ORIG COST	PROM SAVE	NET COST	EXTENDED COST	SRP	GP %
INVOICE: 41729		PALLET: S632987		001-Grocery		DATE: 04/24/2019							
01	16080	CUT GREEN BEANS	24	14.5 OZ	4			10.08		10.08	40.32	0.49	14.3%

# Printing Invoices - eInvoices

\*Refer to the SAL Browser User Guide Pg. 58 (keyword search 'browser' on the Document Repository)

1. Log on to SAL Browser
2. Click on Applications and select Inventory and Accounting
3. Under Reports, select eInvoice
4. Click an invoice to highlight it
5. Click View for a detailed view
6. You can view or print individual invoice detail from here
7. Use the scroll bar on the right side of the screen to navigate through the invoice detail
8. Click the  icon to print the invoice detail



Records shown: 1048

Triceps Load #	Shipment Date	Statement Date	Total Cost	Total Retail	Gross Profit %
491571	07/26/2018	07/26/2018	\$18,577.19	\$23,571.72	21.18
491358	07/24/2018	07/26/2018	\$14,407.34	\$17,790.57	19.01
491194	07/21/2018	07/21/2018	\$9,862.37	\$13,099.62	24.71
491055	07/19/2018	07/21/2018	\$14,067.89	\$17,560.56	19.88
490923	07/17/2018	07/21/2018	\$17,485.80	\$21,870.32	20.04
490732	07/14/2018	07/14/2018	\$12,525.71	\$15,586.05	19.63
490591	07/12/2018	07/14/2018	\$17,211.19	\$21,910.16	21.47
490461	07/10/2018	07/14/2018	\$13,077.38	\$16,776.46	17.29
490271	07/07/2018	07/07/2018	\$13,986.25	\$17,623.45	20.63
490215	07/05/2018	07/07/2018	\$14,913.73	\$18,739.42	20.41
490000	07/03/2018	07/07/2018	\$14,498.46	\$18,117.08	19.97
489796	06/30/2018	06/30/2018	\$9,202.64	\$11,358.02	18.97
489673	06/28/2018	06/30/2018	\$11,202.58	\$14,291.70	21.61
489426	06/26/2018	06/30/2018	\$15,410.46	\$18,975.60	18.78
489351	06/23/2018	06/23/2018	\$15,635.81	\$19,597.82	20.21
489210	06/21/2018	06/23/2018	\$14,972.23	\$19,070.83	21.49
489081	06/19/2018	06/23/2018	\$11,703.04	\$14,976.65	21.85
488890	06/16/2018	06/16/2018	\$11,990.17	\$15,637.40	23.32
488754	06/14/2018	06/16/2018	\$12,000.24	\$15,963.85	24.82
488517	06/12/2018	06/16/2018	\$13,200.77	\$16,529.56	20.13

# Prior to Delivery – Calibrate Thermometer



Ensure the probe thermometer is calibrated prior to use.

1. Make mixture of water and ice
2. Let sit for 4-5 minutes
3. Place probe in a mixture of ice and water until reads 32° F



Ensure the infrared thermometer is operational and available at the receiving door to quickly assess external product temperatures.

# Prior to Delivery – Initiate Go Spot Check *Load Audit*

- It is recommended to complete the *Load Audit* in Go Spot Check during and after every delivery
- This checklist helps ensure each delivery is compliant and meeting SALs expectations/standards so the DC can take action if need be
- This also assists by educating the store teams what to look out for when verifying/auditing a delivery
  - i.e. chemicals are not decked above human or pet food items, adequate shrink wrap and proper stacking/no leaning pallets, etc.

21 Required 2 Optional

**Driver**  
5 Required 0 Optional

**Load Quality**  
8 Required 0 Optional


**Product Quality**  
5 Required 0 Optional

**Dunnage Pickup**  
2 Required 0 Optional


**Additional Load Comments/Feedback**  
1 Required 2 Optional

✓ Start Mission


0/5 Required 0 Optional

Enter Delivery Date 


PICK A DATE

Did the driver provide the Bill of Lading (BOL) paperwork? 

YES NO


Did the load arrive on time, or within the allotted time window (+/- 30 mins)? 

YES NO


Was the driver professional? 

YES NO


0/8 Required 0 Optional

Was the load sealed when it arrived? 


YES NO

Is the actual refer temperature between 33-38 degrees? 

YES NO

Did all ordered pallets arrive with the load per the BOL? 

YES NO


Did all ordered items arrive on perishable pallets per the invoice? 

YES NO


# Arrival of Delivery – Check Reefer Temp

- Prior to breaking the seal, inspect the reefer temperature on the truck
- Acceptable temperatures are 33 Degrees to 38 Degrees
- Record the temperature in Go Spot Check *Load Audit* along with a picture of the reefer if out of temp
- Contact the DC immediately if not within temperature range



Is the actual refer temperature between 33-38 degrees? 

☒ YES ☐ NO

Take a picture of the temperature display on the reefer 

ADD PHOTO



# Arrival of Delivery – Obtain Paperwork

- Obtain the *Pallet Verification Form* (Delivery Manifest) and *Dunnage Form* from the driver
- A Store Representative must break the seal on the trailer (not the driver)
- Confirm the following items using the information on the invoice and *Pallet Verification Form*
  - Store # and address
  - Physical seal number
  - Load number
- If there is a seal or load number discrepancy, contact the DC immediately

**Save a lot** EDWARDSVILLE(GROC) CUSTOMER #: 427 DATE: 04/24/2019  
 29 W Gateway Commerce Center  
 Edwardsville, IL 62025 **LOAD: 509394**

SOLD TO: Overland, MO 9430 Midland Blvd SHIP TO: Overland, MO 9430 Midland Blvd

The perishable agricultural commodities listed on this invoice are sold subject to the statutory trust authorized by section 5(C) of the perishable agricultural commodities act 1930(7 U. S. C. 498(E) (C)). The seller of these commodities retains a trust claim over these commodities, all inventories of food or other products derived from these commodities and any receivables or proceeds from the sale of these commodities until full payment is received. Seller is entitled to interest at the highest rate allowed by law on delinquent amounts and attorney fees and costs in pursuing collection.

DEPT	ITEM CODE	ITEM DESCRIPTION	PACK	SIZE	QTY	MISC	AMT	ORIG COST	FROM SAVE	NET COST	EXTENDED COST	SRP	GP %
INVOICE: 41729 PALLET: S632987 001-Grocery DATE: 04/24/2019													
01	16080	CUT GREEN BEANS	24	14.5 OZ	4			10.08		10.08	40.32	0.49	14.3%

1869850 SAVE-A-LOT

DUNNAGE PICK UP & VISIBLE DAMAGE

# Unloading – Pallet Verification

- **Verifying receipt of all pallets is the most important component of the receiving process**
- As pallets are unloaded, each pallet ID number on label should be verified and cross referenced using the *Pallet Verification Form* (Delivery Manifest)
- Once all pallets have been unloaded and accounted for, a store representative will sign-off on the driver's copy of the *Pallet Verification Form*
- If there is a discrepancy, contact the DC immediately

\*Warehouse Copy\*  
DATE: 01/18/19  
Store#: 000424  
Customer Location: St Louis, MO -Jefferson A  
Address: 1631 S Jefferson Ave  
St Louis MO 631040000  
Phone #: Load#: 503260  
Seal#: 1867293  
DC Name: SAVE-A-LOT (ST. LOUIS)  
Address: ROUTE 1 QUARRY ROAD  
WARRENTON, MO 63383  
Phone #: Trailer#: 418  
Sealer's Initials: \_\_\_\_\_

01/18/19 03:08 1

	CUBE	PCS		CUBE	PCS
1 - S124679 CANNED GOODS	10.63	98	118	2 - S124688 PLT ITEMS,CEREA	113.85 8
1 - S124697 PLT ITEMS,CEREA	53.33	1		1 - S124704 SODA,PET,CANDY	68.29 99
1 - S124713 UPSTREAM	44.16	9		1 - S132544 REPROCESS GROUP	2.87 3
1 - S132786 PRODUCE	3.17	4		1 - S133080 COOLER	0.47 1
SPRING WATER PLT	SP# S124688			CRYSTAL 2-O 24PK WTR	SP# S124688
SUGAR - PLT	SP# S124697				
LOAD TOTALS	WEIGHT 10267	CUBE 350		PIECES 243	

THIS PALLET PICKED WITH PRIDE & ACCURACY BY: KEITH THURMAN  
St Louis, MO -Jefferson Ave  
CUSTOMER# 000424 DEL DATE 1/13/19  
INVOICE# 0017470 FACILITY 01/21 CUBE# 53.3  
STAGING AREA 1 OF 2  
02 STOP 2 OF 2 SHIP PALLET S124697

"ALL PALLETS RECEIVED" ED\*\*  
STORE REPRESENTATIVE

# Unloading – Cold Chain Integrity

- 30 Minute Cold Chain Policy – 30/30 Rule
  - Product requiring refrigeration **MUST** be placed in the appropriate walk-in cooler/freezer within **30 minutes** of receipt
  - Once removed from the walk-in cooler/freezer, the cold product **MUST** be worked/stocked within **30 minutes** on the sales floor
- Pallets should not be left outside walk-in coolers/freezers
- If you have limited space, work temperature sensitive pallets first to maintain the cold chain



\* The top layers of this pallet should be down stacked and pallet should be placed inside the freezer if it's not being immediately worked/stocked.



# Unloading – Dunnage Inspection

- Dunnage Check List should be utilized and completed by the driver and verified by the manager receiving the load
- Verify the condition of pallets/cases received and notate any visible damage

**Save a lot**  
food stores

## DUNNAGE PICK UP & VISIBLE DAMAGE

Date: 1-18-19 Store # 424-5 Store Location: JEFFERSON Driver: \_\_\_\_\_ Time: \_\_\_\_\_  
Tractor: \_\_\_\_\_ Trailer: 418  
AL# 6

**DELIVERED TO STORE** **PICKED UP FROM STORE**

White Pallet	(\$)	_____	_____
PECO Pallet	(\$15)	_____	_____
Milk Pallet	(\$30)	_____	_____
Freezer Box	(\$1,100)	_____	_____
CHEP Pallet	(\$28)	_____	_____
Plastic Pallet	(\$23)	_____	_____
Milk Crate	(\$10)	_____	_____
Cardboard Bales		_____	_____
IGPS Pallet	(\$28)	_____	_____
Banana Blanket		_____	_____
TOTAL \$	\$	_____	\$ _____

Banana Quality Acceptable ☐ Unacceptable\* ☐  
\*If bananas are unacceptable at time of delivery, please contact the warehouse immediately 731-784-6099.

Driver Signature: \_\_\_\_\_  
Customer Signature: \_\_\_\_\_

EXPIRED Baby Formula Returns (NO CREDIT)  
☐ Baby Formula Full Cases \_\_\_\_\_  
☐ Baby Formula Units \_\_\_\_\_

☐ No noticeable signs of damage at the time of unloading  
☐ The following items had noticeable signs of damage  
(write in below the item description for each item with visible damage)

THIS FORM MUST BE ATTACHED TO EACH LOAD LEAVING THE DISTRIBUTION CENTER. THE DRIVER MUST VERIFY AND RECORD ON THIS FORM ANY NOTICEABLE SIGNS OF DAMAGE TO CASES OR PALLETS AS PALLETS ARE UNLOADED FROM THE TRUCK. THE DRIVER WILL THEN HAVE THE STORE REPRESENTATIVE PRESENT AT UNLOADING VERIFY ANY DAMAGE TO THE UNLOADED PALLETS AND RECORD THE APPROPRIATE INFORMATION ON THIS FORM. ONCE COMPLETE, THE DRIVER AND THE STORE REPRESENTATIVE MUST SIGN THIS FORM. THE YELLOW COPY IS LEFT WITH THE STORE. UPON RETURN TO THE DISTRIBUTION CENTER THIS FORM MUST BE TURNED IN WITH THE STORE PAPERWORK.

This is not an invoice. Dollar (\$) value represents replacement cost of assets. This document reflects the delivered and returned amounts of each item.

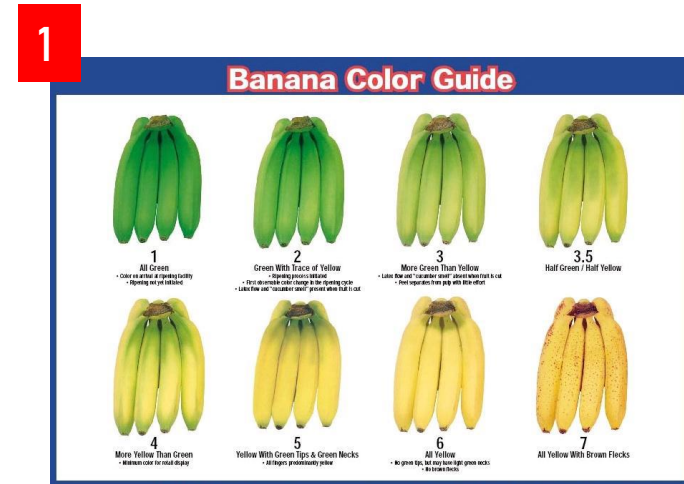
Form 560H © 2018 Save-A-Lot food stores All Rights Reserved

Ensure to notate  
any damage  
found



# After Unloading – Banana Temp Check

- Inspect color upon receiving; use *Banana Color Guide* in receiving to gauge ripeness
- Upon receipt, temperatures must be checked on two bananas (one from top case, one from bottom case) using a probe thermometer
  1. Insert probe thermometer
  2. Wait until the temperature gauge stabilizes
  3. Note the final temperature
  4. Enter the temperature in the Go Spot Check Load Audit
  5. DO NOT sell probed product. Place the bananas used for testing in the Produce ID loss bin.
- Temperatures below 55° F or above 65° F are outside the acceptable range
- Include details of discrepancies in the *Load Audit* to support request for credit if applicable



3

Are bananas bagged and blanketed properly? ✓

Bananas are of acceptable quality and within acceptable temp range of 55 - 65 degrees? Check product from top and bottom cases. ✓

Take a photo of bananas

# After Unloading – Banana Staging

1. All Banana cases are to be opened
2. Once opened, cross-stack all cases onto a U-Boat/Pallet
  - Cross-stacking allows air flow and will preserve product quality



# After Unloading – Meat Temp Check

- Upon receipt, use the probe thermometer to conduct a temperature check on one beef item, one chicken item and one pork item
  1. Place the probe thermometer **between** two packages. **DO NOT probe product or break mother bag.**
  2. Wait until the temperature gauge stabilizes
  3. Note the final temperature
  4. Enter the temperature in the Go Spot Check *Load Audit*
- Temperatures below 28° F or above 35° F are outside the acceptable range
- Include details of discrepancies in the Load Audit to support request for credit if applicable



Check one beef item, and record the product temp. ●○  
Acceptable range (28-35 degrees)

Choose One

Check one pork item, and record the product temp. ●○  
Acceptable range (28-35 degrees)

Choose One

Check one chicken item, and record the product temp. ●○  
Acceptable range (28-35 degrees)

Choose One



# After Unloading – Item Verification

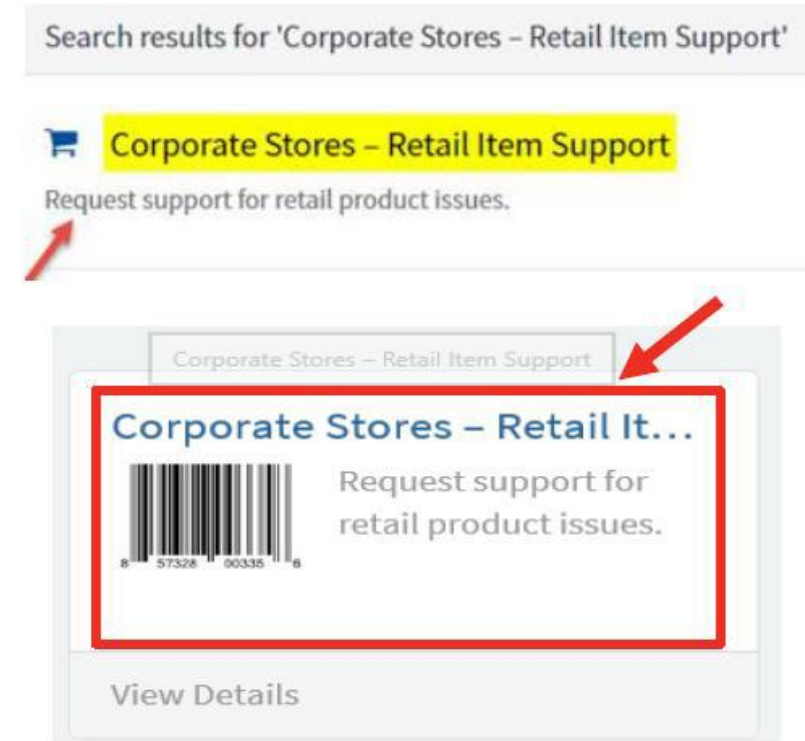
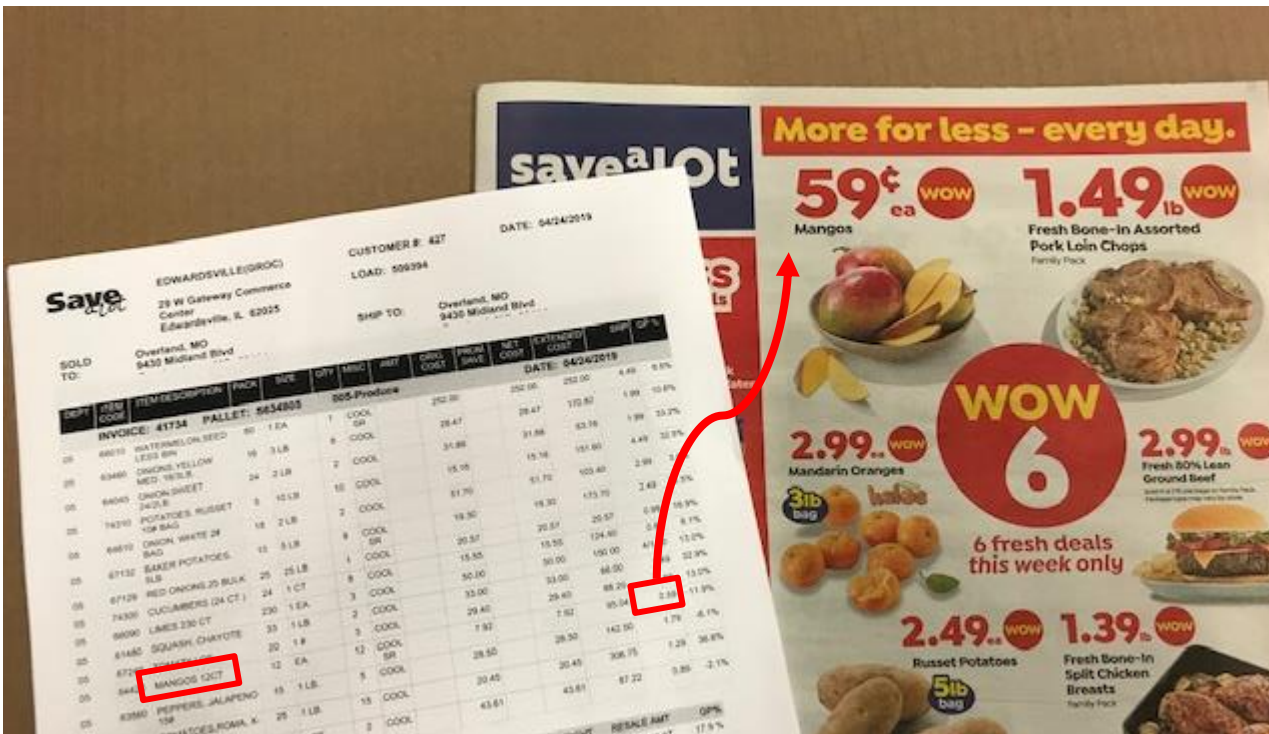
DEPT	ITEM CODE	ITEM DESCRIPTION	PACK	SIZE	QTY	MISC	AMI	ORIG COST	PROM SAVE	NET COST	EXTENDED COST	SRP	GP %
INVOICE: 20191 PALLET: S188609 004-Meat DATE: 01/28/2019													
10	72899	BEEF CHUCK ROLL B/L CRT CH	58	LBS	1	COOL		196.65		196.65	196.65	4.97	30.6%
		57.00						3.45		3.45	196.65		
10	72132	MEXICAN BEEF LOIN, SHORT SB	60	LBS	3	COOL SR		513.27		513.27	513.27	4.17	30.7%
		55.30						2.89		2.89	159.81		
		58.73						2.89		2.89	169.72		
		63.58						2.89		2.89	183.74		



- Using the invoice, spot check **5 items** that are high quantity or high value in each of the following departments:
  - Meat - Confirm weights of cases received against the weights on the invoice if applicable
  - Produce - Confirm weights of cases received against the weights on the invoice if applicable
  - Cooler
  - Frozen
  - Grocery
- Inspect cases looking for
  - Correct item
  - Correct quantities
  - Quality issues
  - Product that looks/smells foul or spoiled
  - Packages that are damaged, torn, soiled, or have missing/illegible labels
  - Cases with stains that indicate that they might have been contaminated by water, toxic materials or pests
- Special Considerations
  - After the truck has been stocked, walk the sales floor paying special attention to Out of Stocks (OOS) and low levels to identify potential DC shorts
  - If it is believed that items have been shorted, refer to the invoice to review known DC Stock Outs
  - If shortages are confirmed, submit a three sheet request for immediate delivery if needed and request credit
  - Food labeled frozen and shipped frozen needs to be received frozen

# After Unloading – Price Verification

- Verify that the Suggested Retail Price (SRP) on the invoice does not exceed the current ad price for all meat and produce ad items
- Escalate price discrepancies to ServiceNOW by submitting a ticket on the SAL Browser



# After Unloading – Dating and Rotation

- All Fresh Meat, Produce, Frozen and Cooler cases must be dated and rotated when placed in backstock ensuring closest dated product is on top to ensure existing backstock product is worked to the sales floor first
- While it is not required to date Grocery back stock, cases must be rotated to ensure existing product is worked to the sales floor first

## Fresh Meat

- Cases must be dated with the **Receiving Date** in black marker and **Scale by Date** in red marker

\*Reference the Meat Dating Calendar to identify Scale by Date



## Produce, Frozen & Cooler

- Cases must be dated with the **Receiving Date** in black marker



# After Unloading – Submit Go Spot Check *Load Audit*

- After completing all of the required fields, submit the *Load Audit* in Go Spot Check

This screenshot shows the 'Load Audit (Customer Confidence)' form in the Go Spot Check app. The form is titled 'Sections' and includes the following sections:

- Driver**: 5/5 Required, 0 Optional. A green checkmark is visible in the right margin.
- Load Quality**: 7/7 Required, 0 Optional. A green checkmark is visible in the right margin.
- Product Quality**: 7/7 Required, 0 Optional. A green checkmark is visible in the right margin.
- Dunnage Pickup**: 2/2 Required, 0 Optional. A green checkmark is visible in the right margin.
- Additional Load Comments/Feedback**: 0 Required, 2/2 Optional. A green checkmark is visible in the right margin.

At the bottom of the form, there are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a red rectangle.

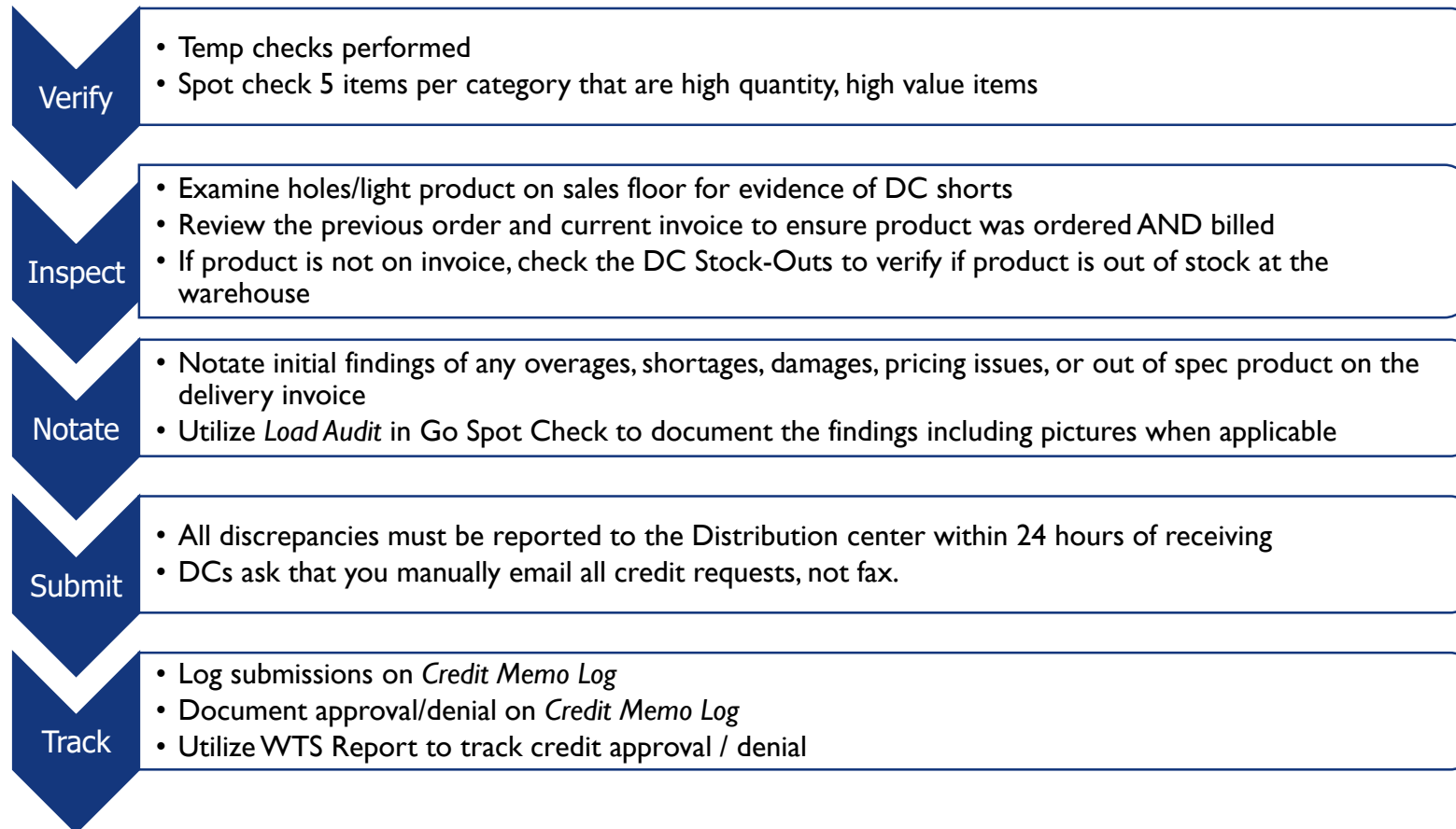
This screenshot shows the same 'Load Audit (Customer Confidence)' form, but with a dialog box overlaying the center. The dialog box is titled 'Submit this mission?' and has two buttons: 'No' and 'Yes'. The 'Yes' button is highlighted with a red rectangle.



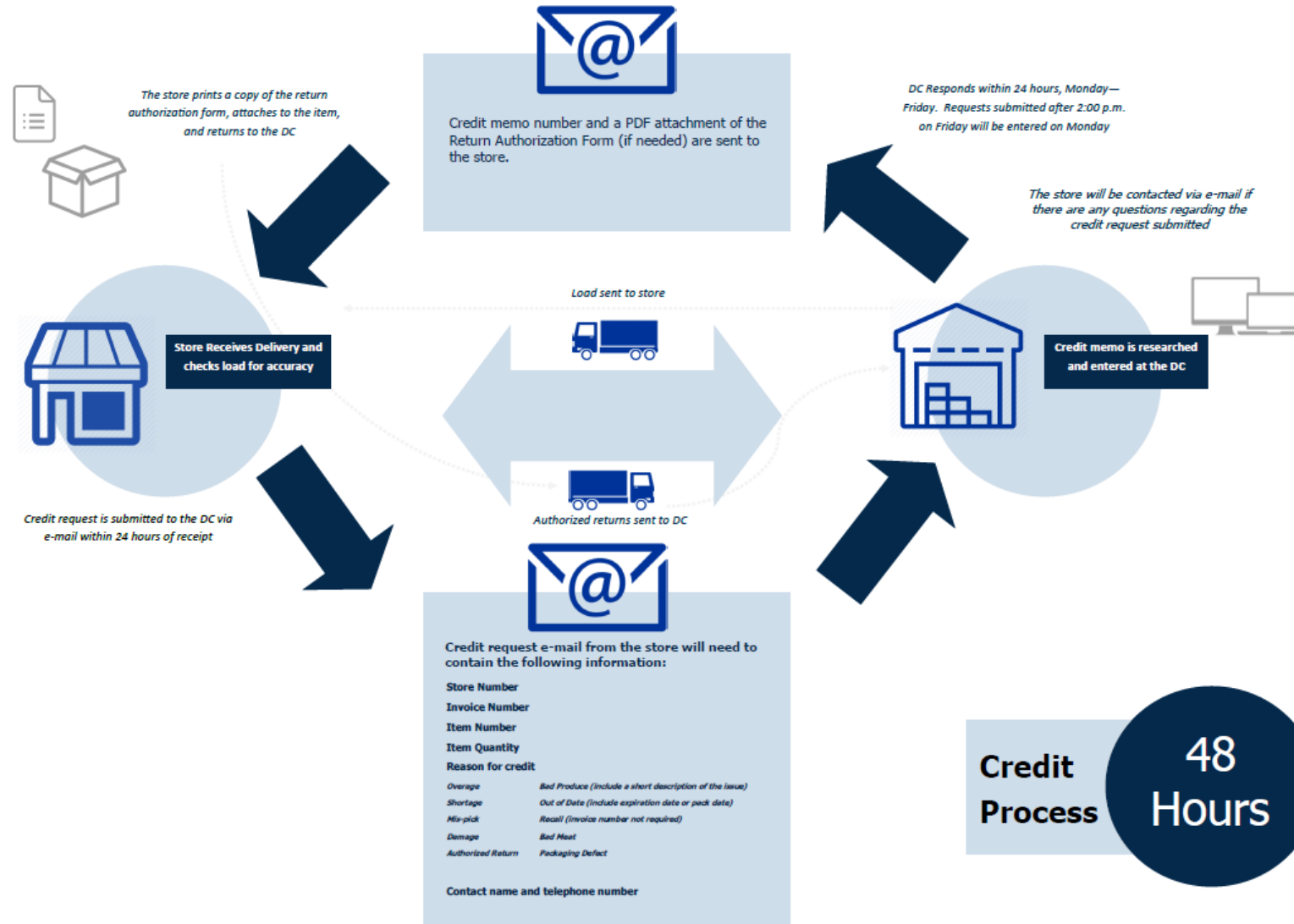
# Credit and Return Process

# Store Credit – Store's Role

- Credits help ensure our stores are properly reimbursed for any damages or quality issues discovered during or after a delivery from the Distribution Center



# Store Credit Cycle



# Credit and Return Process

## Credit

- All discrepancies discovered in the unloading process **MUST** be emailed to the DC Credit Department email box within 24 hours of delivery receipt
- When emailing for credit, include the following information available:
  1. Store number and name
  2. Contact Name
  3. Invoice number of product categories with discrepancies
  4. Invoice date
  5. Item code
  6. Quantity
  7. Reason for request
  8. Contact name and phone number

## Return

- Provide detailed information and pictures in the Go Spot Check *Load Audit* for best results of credit approval
- The DC may not require a return for credit approval if sufficient information is provided
- However, if no supporting documentation is provided, the DC may request a return of full-case quantity products
- If a return is required by the DC, the store must call the DC for an *Authorization for Return* form
- If a return is requested, place product on a pallet and label with 'Return to DC' to prevent it from being worked to the sales floor
- If the DC fails to pick up the return on the next delivery, the store can discard the product and be given credit for the issue

# Credit Memo Log – Credit Submission

- Utilize the *Credit Memo Log* to keep track of submitted credits sent to the DC and credits that have been approved or denied
- After emailing the credit submission, document the information on the *Credit Memo Log*
- Keep this form on the Credit Clipboard in the office for quick reference

Credit Memo Log										
Utilize this form to track all credits. If credit has not been posted on the WTS Report within 10 business days, please reach out to your DM for further action.										
1) Complete upon submission of credit requests to the DC						2) Complete upon review of DC's response				3) WTS
Date of Truck Delivery	Date of Credit Request	Invoice#	Item Description	Item#	Amount of Credit Request	Credit Approved (Y or N)	Date of Credit Memo	Credit Memo #	Credit Amount	Credit Posted (Y or N)
3/2/2019	3/2/2019	20191	Hormel Beef Tamales	47645	\$14.52					
3/2/2019	3/2/2019	20191	Banquest Salisbury Steak Meal	57232	\$12.48					

# Credit Memo Log – Credit Approval

- DC will respond via email with 24 hours with approval or denial (Monday – Friday)
  - \*Requests submitted after 2 PM Friday will be entered on Monday
- From the email, document the following information on the *Credit Memo Log* for each item
  - Credit Approved (Y/N)
  - Date of Credit Memo
  - Credit Memo #
  - Credit Amount
- Credits may be denied by the DC Credit Department for various reasons including:
  - Failure to request credit within 24 hours of receipt
  - Failure to return merchandise as requested
  - On-site visit reveals product was received
  - Store created damage
- If the store did not receive a response in the allotted timeframe or is dissatisfied with the decision to deny credit for any reason, escalate to the Area Business Partner

it to your DM for further action.				
2) Complete upon review of DC's response				3) WTS
Credit Approved (Y or N)	Date of Credit Memo	Credit Memo #	Credit Amount	Credit Posted (Y or N)
Y	3/7/2019	1-5493-05	\$14.52	
Y	3/7/2019	1-5493-01	\$12.48	

# Credit Memo Log – Credit Posting

- Cross reference the items on the *Credit Memo Log* against the information on the WTS Report on **Thursday mornings**
- If the item appears on the WTS Report, indicate 'Yes' on the Credit Posted column
- If a submitted credit has been approved, but not posted on the WTS Report within 10 days, contact your DM for follow-up

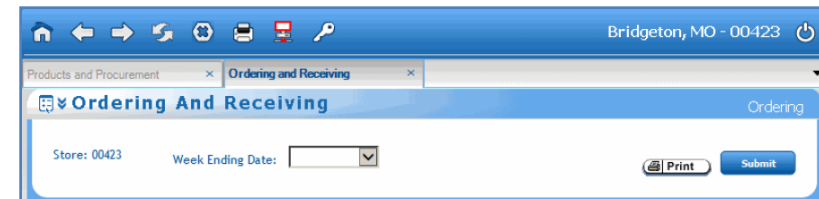
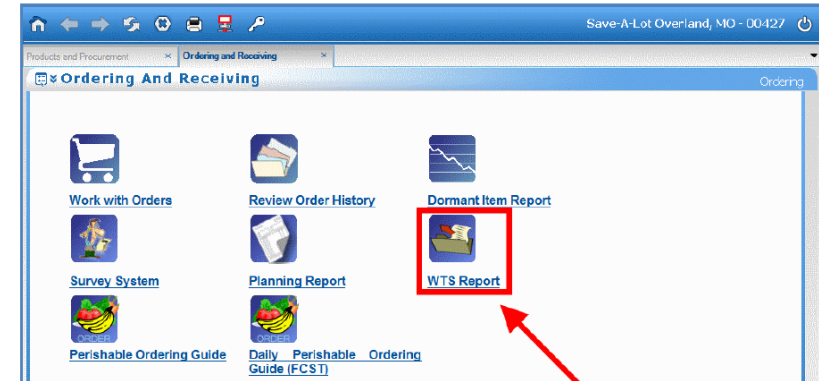
Credit Memo Log										
Utilize this form to track all credits. If credit has not been posted on the WTS Report within 10 business days, please reach out to your DM for further action.										
1) Complete upon submission of credit requests to the DC						2) Complete upon review of DC's response				3) WTS
Date of Truck Delivery	Date of Credit Request	Invoice#	Item Description	Item#	Amount of Credit Request	Credit Approved (Y or N)	Date of Credit Memo	Credit Memo #	Credit Amount	Credit Posted (Y or N)
3/2/2019	3/2/2019	20191	Hormel Beef Tamales	47645	\$14.52	Y	3/7/2019	15493-05	\$14.52	Y
3/2/2019	3/2/2019	20191	Banquest Salisbury Steak Meal	57232	\$12.48	Y	3/7/2019	15493-01	\$12.48	Y

Date	Trn#	Type	Trn Amt	Void Amt	Scratch Amt	Credit Amt	Retail Amt
03-07-2019	MEMO #15493-05	IV=29720 SHORT ON DELIVERY					
		HRML BF TAMALES IN CHILI SCE					
		ITEM=47645 QTY 1 @ -14.52		0.00	0.00	-14.52	-17.08
03-07-2019	MEMO #15493-01	IV=29721 SHORT ON DELIVERY					
		BQ SALISBURY STEAK MEAL					
		ITEM=57323 QTY 1 @ -12.48		0.00	0.00	-12.48	-14.68

# Tracking Credits – WTS Report

\*Refer to the SAL Browser User Guide Pg. 246 (keyword search ‘browser’ on the Document Repository)

- Utilize the WTS Report to track credit issuance
- Log on to SAL Browser
  - Click on Applications and select Products & Procurement
  - Click on Ordering
  - Click WTS Report
  - Select the Week Ending Date using the drop down box
  - Click Submit
  - Scroll down to the credit memo information



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# Returns

- The DC should not require a return for credit approval if photos and detailed information about the issue is provided in the *Load Audit*
- If a return is required by the DC, the store must call the DC for an *Authorization for Return Form*
- In the case of returns, place product on a pallet, label with 'Return to DC' and shrink wrap the load to prevent it from being worked to the sales floor

# Recipe for Success / Tips

- Execute and maintain backroom organization procedures to assist in the efficiency of receiving
- Conduct temperature checks for each delivery
- Uphold Cold Chain Integrity for product with temperature control using the 30/30 Rule
- Review and verify incoming pallets, product type, quantity, price and quality match what we are billed
- Dating and rotation
- Timely credit submissions and tracking

# Reference Material

- [SAL Browser User Guide](#)
  - *elInvoices* – pg. 58
  - *WTS Report* – pg. 246
- [2021 Fresh Meat Dating Calendar](#)
- [Credit Memo](#)
- [Go Spot Check User Guide](#)