

SEP 29 1989

SOUTHWESTERN BELL TELEPHONE PRACTICE  
SWBT Standard

SECTION SW 747-100-906  
Issue A, July 1989

VERIFICATION/SHIPPING GUIDELINES  
FOR  
SWBT's RETAIL OUTLET

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1. GENERAL

- 1.01 This instruction provides guidelines for controlling shipments made from SWBT's Retail Outlet. This method will also assist personnel who have shipping responsibilities to track and monitor shipments when sales of surplus material are made.
- 1.02 Whenever this section is reissued, the reason(s) for reissue will be listed in this paragraph.
- 1.03 All sales made by Logistics Services personnel must be made in accordance with Joint Practice No. 123, Disposition Services Policy and Procedures.

2. RESPONSIBILITIES

- 2.01 This section provides information about the responsibility of individuals who are involved in shipping activities from the Retail Outlet. Following are the positions and responsibilities associated with the shipping process. Please note that the responsibilities listed pertain solely to sales and shipping from the Retail Outlet.
- a. Manager-Specialized Sales - This position is responsible for making sales of miscellaneous material received at the Retail Outlet for disposition. This responsibility includes selling material which has been inventoried and also material from the store which does not require inventory. This manager is also required to perform the following:
1. Access the Accounts Management and Invoicing System (AMIS) to check material quantities and availability;
  2. Complete Bills of Sale (SW2005) when sales transactions occur;
  3. Ensure verification of material is made in conjunction with warehouse personnel prior to any sale of inventoried material;

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4. Complete a Material Verification/Shipping Request (See Exhibit 1) when verification of material is required, and submit such request to warehouse personnel for processing;
  5. Provide a copy of the completed Bill of Sale and Material Verification/Shipping Request to the Customer Clerk. The Customer Clerk will use such information to complete a Product Shipping Report (SW6022, see Exhibit 2);
  6. Maintain records of sales transactions; and
  7. Make decisions about customer credit ratings and shipments of material when a customer's credit rating is in question.
- b. Manager-Store Operations - This position is primarily responsible for management of Southwestern Bell Telephone Company's Surplus Sales Outlet (commonly referred to as the Retail Outlet) and for warehouse operations at that facility. This manager is also responsible for making sales of miscellaneous material (inventoried and non-inventoried material). This manager is required to perform the following:
1. Supervision of resources required for store operations and for warehouse operations;
  2. Accountable for customer receipts from Retail Outlet sales and also for the administrative duties associated with store operations;
  3. Accountable for all shipments made from the Retail Outlet;
  4. Access the Accounts Management and Invoicing System (AMIS) to check material quantities and availability of material prior to making sales. Also responsible for the verification process which is conducted by warehouse personnel;

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5. Complete Bill of Sale (SW2005) when sales are made to document sales transactions;
  6. Complete a Material Verification/Shipping Request (See Exhibit 1) when verification of material is required, and submit such request to warehouse personnel for processing;
  7. Provide a copy of the completed Bill of Sale and Material Verification/Shipping Request to the Customer Clerk. The Customer Clerk will use such information to complete a Product Shipping Report (SW6022, see Exhibit 2);
  8. Maintain records of sales transactions; and
  9. Make decisions about customer credit ratings and shipments of material when a customer's credit rating is in question.
- c. Customer Clerk - This position is responsible for providing support related to store operations and warehouse operations at the Retail Outlet. This position is also responsible for making sales of miscellaneous material from the store which does not require inventory. Additionally, this position receives and processes receipts from store sales. Related to shipments, this position is also responsible for the following:
1. In conjunction with the Manager-Store Operations, provide direction to warehouse personnel when shipments of material are required;
  2. Assist in the completion of Bills of Lading when shipments are made via common carrier;
  3. Responsible for the input of reports (Product Receiving, Product Shipping, and Product Adjustment/Modification Reports) into the AMIS data base;

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4. Coordinate with warehouse personnel and the Sales Forces to effectively verify and ship material when sales are made; and
5. Maintain records of documents related to the verification process, shipping, receiving, and other transactions which require changes to the AMIS data base.

### 3. VERIFICATION/SHIPPING PROCESS

- 3.01 This section provides information necessary for the verification and shipping process used at Logistics Services' Retail Outlet.
- 3.02 The following steps are required for verifying or shipping material:
- Step 1: Customer calls Logistics Services requesting specific material.
- Step 2: Salesperson checks catalog or AMIS and determines potential quantities and tentatively negotiates the sale. The salesperson explains to the customer that he will check to see if the material exists and will call him back to confirm the sale.
- Step 3: Salesperson completes and submits Verification/Shipping Request (V/SR Request) to warehouse personnel as follows:
- a. V/SR Request should be placed in dispatch area bin or given to the Leadman (non-SWBT person who supervises contract labor personnel); and
  - b. One copy of the V/SR Request is retained by the salesperson for future reference.

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- Step 4: Warehouse personnel confirm whether or not the material is available. While checking availability, the following processing applies:
- a. If material is available then, warehouse personnel note "Yes" on V/S Request, note bin location(s) on request, and return V/S Request to the salesperson.
  - b. If material is only partially available then, warehouse personnel note "Partial" on V/S Request, change quantity on V/S Request, note bin location(s), and return V/S Request to salesperson.
  - c. If material is not available, warehouse personnel note "No" on V/S Request, and return V/S Request to salesperson.
- Step 5: Salesperson calls the customer and negotiates the sale based on the results of the verification request and closes the sale; or the salesperson tells the customer the material is not available and attempts to sell the customer other material.
- a. When a sale is made, the salesperson notes "Yes" in the ship material section of the V/S Request and completes the shipping information (i.e., the shipping address and method of shipment are noted on the request).
  - b. Salesperson places the V/S Request in the dispatch area (bin) or gives the request to the Customer Clerk.
- Step 6: The Customer Clerk processes the shipping request:
- a. A copy of the V/S Request is given to warehouse support personnel to begin the shipping process;

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- b. The Customer Clerk ensures that warehouse personnel perform the following:
  - 1. Weight material (if shipment by UPS);
  - 2. Package or shrink wrap material;
  - 3. Complete packing slip;
  - 4. Move material to shipping dock; and
  - 5. Complete Bill of Lading if shipment is to be made by Common Carrier.

Note: If a bin has been depleted, the bin location shown on the V/S Request is circled. This helps in updating warehouse locations in AMIS.

- c. Once the shipment is ready for release, warehouse personnel provide a copy of the V/S Request to the Customer Clerk and sign or initial the "Shipped By" information on the original V/S Request held by the Customer Clerk.
- d. The Customer Clerk obtains the signature of the Buyer or Buyer's agent at the time the material is released. At this time, the ship or release date is noted on the V/S Request. If a Bill of Lading is used because shipment was made by Common Carrier, the Bill of Lading number is noted on the signature line of the V/S Request and the shipment date is also noted.
- e. A copy of the V/S Request is given to the Buyer or Buyer's Agent.

Step 7: The Customer Clerk files the original V/S Request by month, by date.

3.03 A flowchart is shown in Exhibit 3 which details the flow of the verification/shipping process.

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4. INSTRUCTIONS FOR COMPLETING VERIFICATION/SHIPPING REQUEST

- 4.01 This section provides instructions for completing a Verification/Shipping Request. The following contains the instructions or information required to complete each field.
- a. PAGE \_\_ OF \_\_ - Allows for multiple pages.
  - b. SERIAL NO. - A reference number created by the salesperson. This number will consist of the initials of the salesperson, plus the year, plus a four digit number (which begins with 0001). For example, Jim Crocker's first request would be JC890001.
  - c. Salesperson - Person making the sale and initiating the request.
  - d. DATE - Date request submitted
  - e. TIME - Time of day request completed.
  - f. WAREHOUSE - Warehouse person who receives the V/S Request for processing.
  - g. REMARKS - This section is used to communicate information to the warehouse. For example, this field can be used to convey instructions such as to hold shipment until payment is made.
  - h. MATERIAL AVAILABLE - Instructions are given to circle: "yes," if material is available; "no," if material is not available; and "partial," if only some material exists. If "partial" is selected, the quantity is changed in the "quantity verified" field.
  - i. VERIFIED BY - Requires signature of the person making the verification.
  - j. SHIP MATERIAL - Instructions are given to circle: "yes," to proceed with shipment of material; and "no," when shipment is not to be made.
  - k. SHIPPED BY - Requires signature of person making the shipment.

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- l. SHIPPED VIA - Requires common carrier name or type shipment, e.g., UPS, Company mail, etc.
- m. SHIPPED TO - Requires shipping address.
- n. BUYER OR BUYER'S AGENT - Requires signature of the buyer or the person accepting shipment for the buyer.
- o. QUANTITY VERIFIED - Quantity of material available for sale at the time of verification. This quantity is noted on the V/S Request.
- p. QUANTITY (QTY) - Quantity of material.
- q. PRODUCT CODE/NEW OR USED - AMIS Product code followed by "N" for New or "U" for used. This code can be found in the AMIS data base or in the AMIS Catalog.
- r. PRODUCT DESCRIPTION - Product description as listed in AMIS.
- s. UNIT - Packaging quantities (for example, per individual unit, per case, etc.).
- t. PRICE - Total price based on quantity and number of units (e.g., the total number of units multiplied by a particular price equals the total price).
- u. BIN LOCATION(S) - Warehouse location of material.

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EXHIBIT 1  
VERIFICATION/SHIPPING REQUEST

MATERIAL VERIFICATION/SHIPPING REQUEST

PAGE \_\_\_\_\_ OF \_\_\_\_\_  
SERIAL NO. \_\_\_\_\_

SALESMAN: \_\_\_\_\_ DATE: \_\_\_\_\_ TIME: \_\_\_\_\_  
(From)

WAREHOUSE: \_\_\_\_\_  
(To)

MATERIAL AVAILABLE:  
(Circle one) YES NO PARTIAL

SHIP MATERIAL:  
(Circle one) YES NO

VERIFIED BY: \_\_\_\_\_

SHIPPED BY: \_\_\_\_\_ DATE: \_\_\_\_\_

SHIPPED VIA: \_\_\_\_\_

SHIPPED TO:

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY, ST., ZIP: \_\_\_\_\_

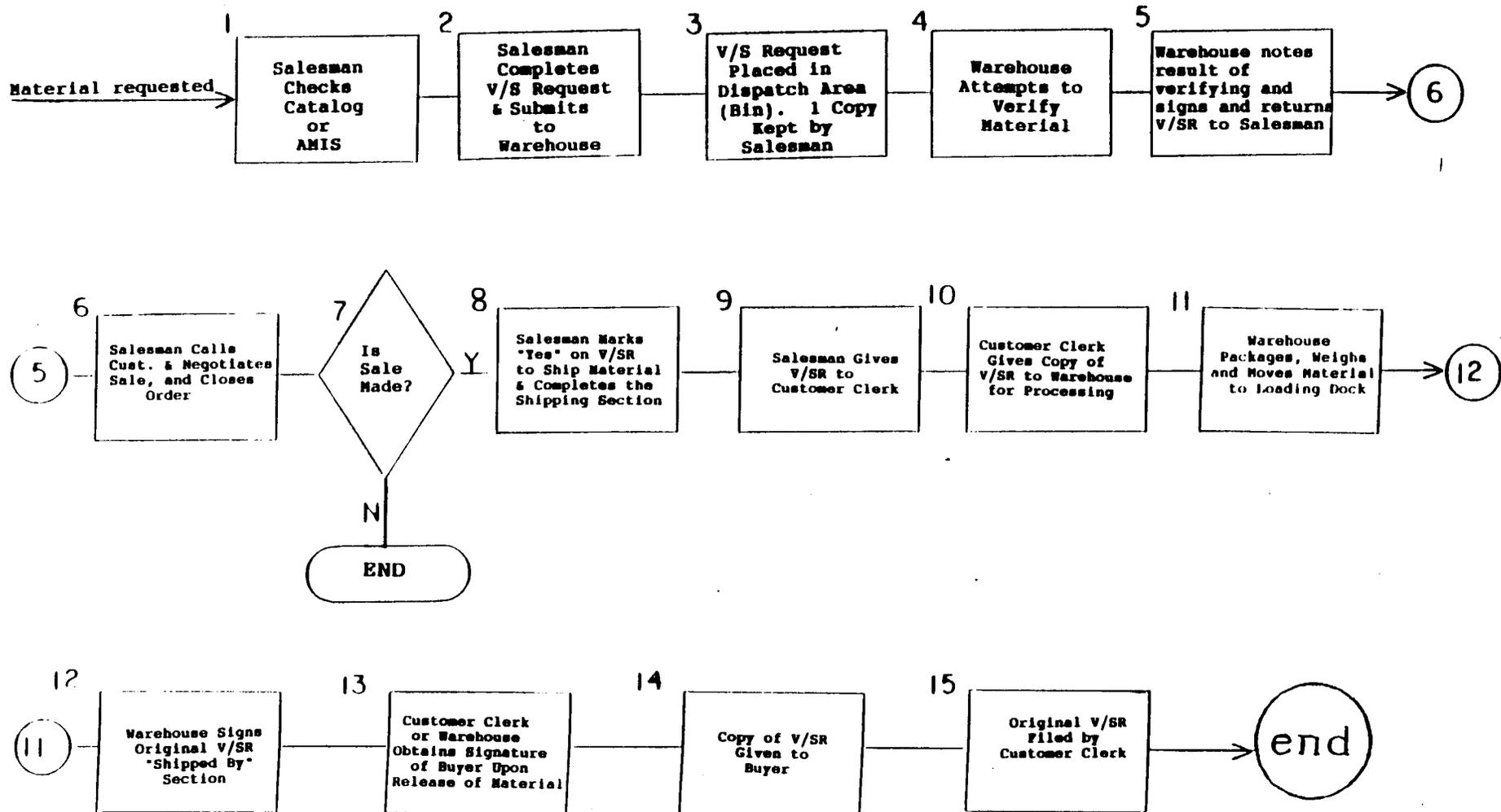
BUYER OR BUYER'S AGENT: \_\_\_\_\_ DATE: \_\_\_\_\_

QTY VERIFIED	QTY	PRODUCT CODE/ NEW OR USED	PRODUCT DESCRIPTION	UNIT	PRICE	BIN LOCATION

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EXHIBIT 3  
 VERIFICATION/SHIPPING PROCESS (FLOWCHART)



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