



Cloud Warehouse Consulting

Warehouse Management System Implementation Checklist

This checklist is designed to guide the analysis process prior to implementing a Warehouse Management System. This document can also be used for automating a portion of your warehouse operation. It is important to note that this was not designed for any specific industry. It attempts to cover aspects that are common to most industries when it comes to inventory control within a warehouse environment. If you need a more specific checklist we can work with you to develop a checklist specifically for your operation.

1. Contacts for your company
 - a. Project contact?
 - b. Technical contact?
 - c. Operational contact for your company?
2. Business overview
 - a. Guiding principle(s)
 - b. Review of warehouse
 - Size
 - Storage type(s)
 - Racking type(s)
 - Number of persons involved in warehouse operation
 - WiFi infrastructure
 - Off site storage
 - Inventory attributes
 - FIFO/LIFO
 - Bill of Materials/Kitting
 - Fill percentage



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- c. Suppliers/Vendors
 - Internal
 - External
- d. Customers
 - Internal
 - External
- 3. Receiving process
 - a. What documents are used or generated during the receiving process?
 - b. What initiates the ordering or production of material?
 - c. How are the orders communicated with the warehouse?
 - d. How is material processed into inventory?
 - Are trucks and material condition quantified?
 - How are these process validated?
 - Is product labeled?
 - Is product received and put away by the same individual?
 - Is material placed on applets? Are those pallets given a licenses plate?
 - How is material put away?
 - Discuss any specific storage requirements of material.
 - How many individuals received material?
 - How many individuals put away material?
- 4. Physical/Cycle Counts
 - a. Do you perform full physical inventories?
 - Frequency
 - b. Do you perform Cycle counts
 - Methodology? (ABC, region of warehouse, item type)
 - c. Frequency or inventory turns?



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5. Order fulfillment

- a. What documents are used or generated during the picking process
- b. How are orders taken?
 - Phone, fax, email
 - EDI
 - API
 - Centrally tracked
- c. Order size/makeup
- d. More than one person per order, wave or batch
- e. Picking methodology
 - Single orders
 - Wave (due date, customer, geography, carrier)
 - Batch
 - Zone
 - Orders checked by?
 - ◆ Packers
 - ◆ Other person
 - ◆ Nobody
- f. Do you have to marry multi-part orders?
- g. Is there a separate packing process from picking?
- h. Order picked with aid of order picker, fork truck, hand truck, cart?
- i. Inventory attributes collected during picking?
 - Lot code
 - Date code
 - Serial number
- j. Is product relabeled during picking?
 - Some customers



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- All customers
 - No customers
6. Order shipment
- a. Shipment methods
 - Common carrier
 - Own trucks
 - Customers pickup
 - Customers trucks
 - LTL
 - Full Trailer
 - Courier
 - b. Do you use a manifest or routing system to ship orders?
 - c. Orders shipped on pallets?