Onboarding Guide

Your Guide to a Successful
SKUSavvy Launch

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General Outline

ONBOARDING STEPS

1. **Data collection and sync**
2. **Channel Connection**
3. **Employee accounts**
4. **Product detail & barcodes**
5. **Warehouse layout & bin labels**
6. **Inventory allocation**
7. **Vendors & purchases**
8. **Carriers & packaging**
9. **Printers & devices**
10. **Orders & fulfillment**

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Step 1: Data Collection & Sync

DESCRIPTION: To get your SKUSavvy account activated you'll need data within the system. The easiest way is to connect you Shopify which will bring over products and new customers/sales but it will not bring over vendors, past customers, employees, warehouses, bin locations or inventory levels.

DELIVERY: Please send any files you would like to import in a CSV format to developers@skusavvy.com

FILES TO SEND:

- **Vendors**: you can incorporate the vendor name, vendor ID or internal number, products the vendors carry (with a unique ID), email, phone, account rep name, street address, city, state, zip, separate billing address, and any notes on the vendor
- **Customers**: customer information can contain customer name, email, phone, notes, location N [name, email, phone, street address, city, state, zip, notes], delivery cost, windows of delivery, flat rate delivery cost
- **Employees**: name, email, title (most of the time it's easier just to enter your employees and assign the roles directly within SKUSavvy
- **Warehouses**: These should be entered directly within SKUSavvy
- **Inventory**: inventory should be counted and added to the system as you allocate that inventory to a bin location since SKUSavvy relies on the location of an item to be able to work effectively

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Step 2: Channel Connection

DESCRIPTION: As a secondary step to the data collection & import, and one that can be done right off, you should get your account connected with the channels you plan to fulfill orders through with SKUSavvy. Channels, such as Shopify, Amazon, eBay, and others enable you to pull your orders, customers, and inventory into the SKUSavvy system so it can be leveraged to fulfill orders across channels.

DELIVERY: You can reach out to our team to have the channel connected, or simply go within your Company > Channel settings and follow the directions to connect that channel. As of the date of this guide, Shopify is the primary channel we support. [Follow this guide to connect Shopify](#) within your SKUSavvy account.

CHANNEL CONNECTIONS SYNC:
Not all channels will include inventory information

- **Products & Variants:** The reason you should connect your Shopify account early on in the process is that SKUSavvy will pull in all your product information for you. **All products are variants even if it is a single product.** Product name, image, SKU, barcode, weight, categories, digital/physical status, and inventory will all be brought in automatically
- **Locations:** each of your locations will be brought into SKUSavvy and added as a warehouse within. Orders are routed to the closest location with inventory available by default
- **Orders:** Orders come into SKUSavvy in near real-time and include the order ID from Shopify, location to fulfill from, shipping method, order tags, customer, shipping address, and item IDs contained within the order as well as the quantity that should be shipped with the order
- **Customers:** As an order comes in SKUSavvy will also bring in a record of the custom associated with the order, as well as the customer shipping address

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Step 3: Employee Accounts

DESCRIPTION: One of the first things you can do to make life easier is to add your employees and assign their roles and responsibilities within SKUSavvy. Anyone who might be involved with SKUSavvy should be added (employee accounts are free). Limiting an employees roles will also limit what they will see in the platform, so make sure to determine which roles each employee should have and check off only those capabilities they need to have so as not to provide private information to an employee who should not have this information.

DELIVERY: Begin adding employees within the main company > employees > invite section of SKUSavvy. You can assign any number of roles then the employee will receive an email invite to get their account activated. Follow this employee guide for step-by-step instructions.

CHANGE EMPLOYEE ACCOUNT STATUS:

- **Activate and Deactivate Employees**: Simple click into an employee record to activate/deactivate and change the account roles
- **Revoke or Resend an Invite:** If the employee should not have received an invite you can revoke the invite so they won't be able to make an account. Also, if the employee received an invite, but has not set up their account within 7 days of receiving the invite, you will need to resend the invitation

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Step 4: Product Detail & Barcodes

DESCRIPTION: If you've already connected your eCommerce channels, the product and variants should have already been brought into your account. If you need to bring a large quantity of products into SKUSavvy without a channel connection, contact us and we will help you import these.

Products need to have a few items to be used within SKUSavvy, of course the more information you add, the better your success will be. For instance, dimensional information, when applied to the product variant will determine the box size suggestion during fulfillment. Another example is the option to mark a variant as a shippable product, which enables the product to be fulfilled (digital products cannot be 'fulfilled' within SKUSavvy, though they will still be contained within the order.

DELIVERY: Ensure each of your products has a barcode associated with it, view barcode formats. If you do not have barcodes, SKUSavvy can generate barcodes for your items in a variety of formats you can print out and apply to a box containing multiple quantity or you can print a label for each individual product. We recommend using QR codes as they are easiest to recognize.

All products are variants, even if there are no variants listed within your eCommerce platform (single product), SKUSavvy holds this information within a variant except title, categories, and image.

PRODUCT DATA THAT SHOULD BE WITHIN SKUSAVVY:
Visit the product guide

- **Basics**: Product name, categories, image
- **Variants:** SKU, price, L*W*H dimensions (you can utilize different , weight, barcode(s), attributes, variant options (UOM, size, color etc.)
- **Physical vs. digital product:** SKUSavvy will still bring over digital products, and these digital products will still show up within the orders, as well as within a batch, but they are not required to be picked, this is to ensure the order keeps it's integrity. **A digital product is not able to produce a shipping label, so if you expect that you should be able to fulfill an order but cannot, check this setting on your product**
- **Backordered item:** Items which are backordered will not be added to a fulfillment batch, instead SKUSavvy will attempt to fulfill the items within that order which are in stock. Once that item is restocked or it is manually marked as not backordered SKUSavvy will add the item under that order and you can fulfill the rest of that order

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Step 5: Warehouse Layout & Bin Labels

DESCRIPTION: When setting up your SKUSavvy account, an important piece to getting the most out of the capabilities is to make sure you have an accurate warehouse layout with shelves/bins similar in position on the map as they are in the warehouse. Once this layout is created you'll get bin labels which are automatically generated and can be printed on 4*2 inch labels. **It is not required to label bins though it is recommended** since you will optionally be able to turn on/off a required scan of the bin. For products that expire you will want to make sure you have bin labels as it is helpful and required to ensure the correct product is coming from the correct bin/expiration date.

Setting up your warehouse layout [video overview](#) and [guide](#)

DELIVERY: You should have a full warehouse layout as closely matching your warehouse the way it is or the way you plan to have it. Using SKUSavvy you can get as accurate as you'd like. The accuracy doesn't matter within SKUSavvy, though it is useful when it comes to batch picking, location of inventory etc. Additionally, bin labels should be used as this is what will determine which location the inventory is coming from within the warehouse. These can be printed within SKUSavvy once you have created your warehouse layout.

[Print bin labels within SKUSavvy](#)

NOTES

- SKUSavvy does not use zones, instead you can use a naming convention on your shelves to determine which zone it should be

SKUSAVVY WAREHOUSE LAYOUT ELEMENTS:

- **Walls/Doors:** first set up the perimeter elements which will help to keep an accurate layout. It is recommended to use the exact walls/doors of your warehouse here.
- **Shelves**: A shelf can contain multiple levels, so you should not create a shelf on top of a shelf, simply add the number of levels the shelf will contain and use the level selector in the top right of the layout to select which level you want to edit bins
- **Bins:** Within a shelf level are bins. Bins hold product and are what you will print labels for. A bin must be within a shelf, but they should not be stacked on top of each other, instead use the level selector to place bins within that shelf
- **Areas:** These are not important from a usability point of view, but they are handy for making an accurate warehouse layout and/or

Step 6: Inventory Allocation

DESCRIPTION: Next up in the onboarding is to get some inventory allocated to those bins within your warehouse layout. If you've connected your eCommerce platform, it's possible that the inventory will be brought into SKUSavvy, but since it does not have a bin assigned to it, the platform doesn't have any reference from where the inventory should come from. There are a few methods you can use to allocate inventory and it's worthwhile to look through each method as they will have different uses at times.

Inventory allocation methods [guide](#)

DELIVERY: To start testing picking & fulfillment within SKUSavvy you'll need to have inventory within at least one bin. Every item movement is logged within the system. You may choose to start adding inventory as the last item on this checklist so that your inventory counts are accurate. SKUSavvy will enable cycle counting so that you can update this over time as well.

INVENTORY BEST PRACTICES:

- **Accuracy:** it is always recommended to keep accurate counts of your inventory within bins since SKUSavvy will help you purchase more on-time, and pickers will need this inventory when picking.
- **Channel Inventory:** though your inventory will be brought over from most eCommerce systems, it is not allocated to a bin quantity it is simply held as a ghost value within that warehouse location until it is actually allocated to a bin
- **Incoming/Committed/Available:** Similar to how Shopify handles inventory SKUSavvy will offer three values for inventory.
  - **Incoming** is inventory that's in transit from your suppliers (a PO) or coming from a cross-dock at another warehouse
  - **Committed** is inventory that has been allocated to an order
  - **Available** inventory is your total inventory minus the committed stock
- **Usage Commitment:** without your commitment to usage of the platform, it will not work for you. By commitment we mean making sure each employee makes all inventory actions within the platform. Moving inventory from one bin to another is done in the platform. Removing inventory is done in the platform. Adding inventory is done in the platform. It is only through your commitment that the platform with work as designed to enhance your overall warehouse efficiency

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Step 7: Vendors & Purchases

DESCRIPTION: This area of SKUSavvy is not required to be able to maintain inventory and fulfill orders. It is however necessary so that you can place purchase orders, or have your purchase orders generated for you. It is also necessary track costs and provide an overall COGS-style report. By tracking purchases within SKUSavvy you will have a better handle on when to purchase, how much to purchase, and when new inventory will arrive as well as to have better metrics all around on the complete cycle of inventory within the warehouse, so there are certainly advantages though it is not necessary.

View the guide for vendors and purchase orders

DELIVERY: Initially you may opt to import vendors and the associated products and costs. If you only have a few vendors and smaller catalog you might opt to input them manually and associate the products and costs through SKUSavvy. To get this process set up you need to make sure each of the vendor within SKUSavvy holds the products and the cost levels. On the purchase side, SKUSavvy allows you to enter a lead time on the product, which is factored into the platform when your purchase orders are generated. Over time, SKUSavvy will look at your order history, current demand, and lead time to generate purchase orders so you can send them off to your vendors and receive inventory.

PURCHASES REQUIREMENTS:

- **Vendor & product association:** within the vendors tab on a product, or within the products > vendor area you can assign vendors to products with a base-cost to them
- **Creating purchases:** products must have a vendor association before they can be used to create a PO. Each PO can be created for only one warehouse at a time, and can be seen within orders -> inbound
- **Automated purchases:** SKUSavvy will help you generate POs by using the following factors to determine when a purchase should be made:
    - **Min/max desired product range** the purchase will bring your inventory up to the max product level set on the product
    - **Lead time:** the time from when a product is ordered from a vendor to when it is received is your lead time. You can set a default value for this lead time
    - **Sales history:** SKUSavvy will look through as many past orders as you have for a specific product to determine if there is seasonal or other variability and try to match this
    - **Product demand:** here the system is looking at how many units are being ordered and whether this is generally increasing or decreasing

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Step 8: Carriers & Packaging

DESCRIPTION: Connection to your carrier accounts enable you to purchase labels and generate a shipping label for each order. You can connect multiple carriers at once which will provide various shipping options available for the box size used to pack the order with. Package sizes are stored here and then added to a warehouse. So, you can have different box types at one warehouse than another. Box quantities are also tracked within SKUSavvy to help you know when you need to purchase supplies for packaging.

View the carriers guide and packaging instructions

DELIVERY: There are only two primary steps here. The first is to add your carriers accounts within the SKUSavvy admin area and the second is to add the package sizes you offer to your admin area, then make them available under the inventory -> packaging within a specific warehouse.

THINGS TO CONSIDER:

- **Current list of carriers available:** we are using ShipEngine on the back-end of SKUSavvy to connect carrier accounts - here are the available carriers
- **Address validation:** each address coming in with an order is automatically verified and if it is not valid, will not be pulled into the batching of orders and you will need to revisit the order on your channel
- **Rate shopping:** by default SKUSavvy will select the most appropriate shipping service based on time, distance and cost of the carrier service, you can make a selection during fulfillment
- **Packaging availability:** you **must** add package sizes and quantity to a warehouse before they can be used as a valid option during fulfillment

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Step 9: Printers & Devices

DESCRIPTION: SKUSavvy will work with nearly any printer from a laptop, or any AirPrint compatible printer on an iPad. The ideal setup is listed below, but we encourage you to use what you have, and add printers as needed. If you will be using iPads (suggested for warehouse operations) then it will need to be an AirPrint compatible printer.

Printers:

- [Brother TD-4550DNWB wireless AirPrint compatible printer](~$450) (~$450)

Devices:

- Any laptop or desktop for admin tasks
- iPad mini for warehouse tasks (check-in, put-away, inventory, picking, packing, shipping)

DELIVERY: As long as your printer is compatible with the device and is able to connect with AirPrint it will work with the SKUSavvy platform.

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Step 10: Shipping & Fulfillment

DESCRIPTION: If you've made it through this onboarding process you'll now be ready to start batching up orders, picking them, packing the order, and getting a shipping label. In order for this process to work it's very important you've set up the warehouse and added inventory, as well as handled the carrier connection, channel connection, and have added packaging material to the warehouse. The first step here is to batch up the open orders. Creating a batch of orders places similar orders together so when you are picking you will visit less bin locations to handle more orders, as in you'll be picking for many orders at one time, then go through a fulfillment process that uses all the items in the batch to complete each order separately.

View the batching guide and picking flow guide as well as fulfillment process

DELIVERY: The picking process should be fairly straightforward once you have batched up a group of orders. This should be done as few times per day as possible as the batches become more efficient the more orders are contained within the batch. Once a batch of orders is picked you will go step by step through a fulfillment process with each order presenting the relevant items and a box size suggestion for the order. Once items are packaged, SKUSavvy will automatically present the shipping labels available for that order where you can purchase and print the label.

THINGS TO CONSIDER:

- **Batches** will be assembled with a limitation on the number of items you want to have in a specific batch. Putting a number of 1 on the batch size will create individual order batches so you can fulfill one order at a time.
- **Single Item Batch:** If you've created a batch, you can go into the open order and find a button to fulfill that specific order which will take you into the specific order fulfillment within the batch containing the order
- **Turn On/Off Scans** within the main company toggle settings to fine tune the efficiency vs. accuracy of the pick and pack process

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