ACCOUNT DATA QUESTIONNAIRE

DATE:

ACCOUNT NAME:

ADDRESS:

PHONE#:

FAX:

STORAGE DATA

1. Average pallet height…………………………………………________inches
2. Average pallet weight…………………………………………_______lbs/pallet
3. Pallet footprint-width…………………………………………________ inches
4. Pallet footprint-depth…………………………………………________ inches
5. Average pallets per stack (without rack)…………………………..________ high
6. Average number of line items stored sku’s………………………………________lines/stored
7. Inventory turns per year…………………………………………_________ turns
   (Annual Shipments-Average monthly inventory)
8. Average inventory in number of pallets………………………………________pallets
9. Average cases per pallet…………………………………………________ cases pallets
10. Average inventory in number of cases…………………………………________ cases /year
11. Average inventory in number of pounds………………………………________ pounds
12. Estimated inventory value………………………………………………..________ dollars
13. Annual Shipments in number of pallets…………………………………________ pallets/year
14. Annual Shipments in number of cases………………………………….________ cases/year
15. Annual shipments in product weight……………………………………________ pounds/year
16. Preferred billing unit (i.e. case, cwt, line item, etc)………………..
17. Are there any special temperature requirements? If so describe:

___________________________________________________

18. Are there any hazardous materials in product line? If so, describe:

___________________________________________________

19. How many physical inventories do you require per year?......

20. Do you benefit from periodic cycle counting?..............

HANDLING DATA

General Information
1. Orders processed annually.............................. _____ Orders
2. Average weight per order.............................. _______ Pounds
3. Average pieces per order................................. _______ pieces
4. Average line items per order............................ _______ Lines
5. Order processing window (hours in advance)............. _______ hours
6. Average orders per day- inbound receipts..................... _______/day in
7. Average orders per day – outbound shipments............... _______/day out
8. Average full units per inbound (i.e.pallets)............... _______ full units
9. Average full units per outbound (i.e. pallets).............. _______ full units
10. Percent parcel shipments outbound...................... _______% parcel
11. Percent LTL shipments outbound......................... _______% LTL
12. Percent truckload shipments outbound..................... _______% TL
13. Pick and pack percentage (open case picking).............. _______% PNP
14. Cross dock shipments? If yes, what percentage of total?..... _____ % x-dock
15. If cross dock applies, does inventory merge apply? (merge entails picking stored goods to match up with cross docked goods)..........................
16. How are orders transmitted to the warehouse? (indicate percentage of each method)

Phone ________%
Fax ________%
EDI _________%
Mail _________%

17. Are orders generated on warehouse bills or on your company’s bills for shipment to consignees? (check one)

Company’s Bill of Lading _______
Warehouse Bill of Lading _______

18. How are shipment and receipt confirmations submitted to you? (indicate percentage for each method)

Phone ________%
Fax ________%
EDI _________%
Mail _________%

19. How are your products rotated? (i.e. FIFO, Date code, Lot code, Random code, customer selects code, etc.) ……………………………………………………

20. Please describe your company’s policy regarding customer returns:

________________________________________________________________________

________________________________________________________________________

21. Please describe your company’s policy regarding warehouse damage:

________________________________________________________________________

________________________________________________________________________

HANDLING DATA

Inbound Profile

1. Palletized inbound loads

Percentage of inbound goods which are palletized: ___________%
Number of pallets per inbound car/trailer load: ______________per T/L

2. Floor stacked inbound loads

Percentage of inbound goods which are floor loaded: ___________%
Number of units per floor stacked per inbound car/trailer load: ______ per T/L
3. Inbound loads in clamp units  
   Percentage of inbound goods which are clamp loaded: ________ %  
   Number of clamp units per inbound car/trailer load: ________ per T/L

4. Inbound loads on slip sheets  
   Percentage of inbound goods which are slip sheet loaded: ______ %  
   Number of slip load units pr inbound car/trailer load: ______ per T/L

5. Inbound loads with drums loaded on floor  
   Percentage of inbound foods which are drums loaded on the floor: _____%  
   Number of drums floor loaded per inbound car/trailer load: ______ per T/L

6. Average weight per inbound car/trailer load………………….. ________pounds

7. Average cases per inbound car/trailer load………………….. ________cases

8. Average line items per inbound car /trailer load……………….. ________ lines

9. Percent of inbound goods by truck…………………………… ____________ %

10. Percent of inbound goods by rail…………………………….. ____________ %

11. Percent of inbound goods by other mode (please describe below)__________ %

   ____________________________________________________________________________

   ____________________________________________________________________________

12. Are advance shipping notices (ASN) sent to the warehouse prior to the date of receipt?....................................................________________________

13. Is it acceptable that carrier appointments are scheduled for your company’s inbound carriers?.................................................... _____________________