

PRAIRIE STAR CREAMERY

All ice cream should be this good

Inventory Operations Analyst

Standard Operating Procedure

Houston Distribution Center · Shreveport Distribution Center

1. Purpose and Scope

1.1 Purpose

This Standard Operating Procedure (SOP) establishes the complete set of workflows, decision rules, and documentation requirements for the Inventory Operations Analyst role at Prairie Star Creamery's distribution centers. The role is desk-based and focused on processing, analyzing, and documenting the results of physical warehouse operations performed by the on-site Inventory & Receiving Coordinator and Warehouse Associates.

The Inventory Operations Analyst receives receiving reports, temperature data, physical counts, and damage observations from the dock crew; applies decision thresholds to this data; updates inventory systems; and sends all required notifications, escalations, and disposition requests. The physical receiving, temperature measurement, pallet counting, product inspection, put-away execution, and cycle counting are performed by on-site warehouse staff and reported to the Analyst for processing.

This SOP exists to ensure that:

- Every inbound shipment of Prairie Star product and outside vendor materials is processed with consistent, repeatable decision logic.
- The cold chain is maintained and documented from the moment product arrives at the distribution center through storage and staging for outbound delivery.
- Inventory records are accurate, current, and auditable at all times.
- Product approaching or past its expiry date is identified, escalated, and disposed of according to tiered disposition rules.
- Every exception, discrepancy, and incident is documented with the correct level of urgency and routed to the correct person for resolution.
- Vendor performance is tracked and escalated when quality or reliability issues emerge.

1.2 Tools

The Analyst performs all work through the following tools and systems:

Tool	Purpose
Email	Formal notifications, incident reports, credit claims, adjustment approvals, and end-of-shift handoff
Slack	Real-time operational alerts, shift updates, and channel-based communication
Excel: inbound_receiving_log.xlsx	Master receiving log — one row per inbound shipment
Excel: inventory_master.xlsx	System of record for on-hand inventory by SKU, lot, zone
Excel: cycle_count_log.xlsx	Cycle count results, variances, recounts, adjustment status

Excel: expiry_tracker.xlsx	Lot-level expiry monitoring with tier assignments
Excel: temperature_log.xlsx	Freezer zone temperature readings (shift start, end-of-shift, excursions)
Excel: vendor_master.xlsx	Outside vendor directory with contacts and known issues
Excel: vendor_scorecard.xlsx	Vendor performance tracking (on-time, quality, fill rate)
Word	Incident reports created from template (IR-[seq]-[YYYY-MM-DD]-[category].docx)
PDF	Transfer manifests and vendor purchase orders (read-only reference)
Calendar	Inbound delivery schedules, close deadlines, shift planning

1.3 Company-Wide Contacts (HQ and Waco)

These are the people outside your DC that you may need to contact. If your situation does not match any listed circumstance, contact your DC Manager first.

Daniel Reyes — Director of Supply Chain — daniel.reyes@prairiestar.com — Slack: @d.reyes

Contact for: P1 and P2 escalations, load rejections, expiry dispositions (red and black tier), policy exceptions. Always notify your DC Manager first or simultaneously.

Emily Carter — Demand Planning Manager — emily.carter@prairiestar.com — Slack: @e.carter

Contact for: Expiry alerts at Orange tier or higher (Section 8.1), inbound short-dated product notifications (Section 8.2), and any other situation when directed by Daniel Reyes or your DC Manager.

Marcus Liu — Procurement Specialist — marcus.liu@prairiestar.com — Slack: @m.liu

Contact for: Outside vendor PO discrepancies, vendor performance concerns, credit claim support for vendor shipments, new vendor onboarding questions.

Hannah Brooks — Inventory Analyst — hannah.brooks@prairiestar.com — Slack: @h.brooks

Contact for: Inventory system discrepancies that cannot be resolved at the DC level, cycle count variance investigations requiring historical analysis, forecast impact questions.

Jacob Patel — Production Planner — jacob.patel@prairiestar.com — Slack: @j.patel

Contact for: Waco transfer discrepancies (variance, temperature, damage), transfer manifest questions, production date questions, transfer schedule changes or delays. Jacob is the primary contact for anything related to product coming from Waco.

1.4 Houston Distribution Center

Site Location: 2847 Eastgate Industrial Blvd, Houston, TX 77015

Main Phone: (607) 808-9078

Carlos Mendoza — DC Manager — carlos.mendoza@prairiestar.com — Slack: @c.mendoza — Shift: 06:00–16:00 CT

Your direct supervisor. Approves dispositions, inventory adjustments, and P3+ escalations. First contact for any situation not covered by this SOP.

Alicia Nguyen — Inventory & Receiving Coordinator — alicia.nguyen@prairiestar.com — Slack: @a.nguyen — Shift: 06:00–15:00 CT

On-site coordinator who performs physical receiving, temperature checks, and counts. Reports data to the Analyst for processing.

Sarah Kim — Warehouse Associate (Senior) — sarah.kim@prairiestar.com — Slack: @s.kim — Shift: 06:00–14:30 CT

Handles receiving, put-away, cycle counts, and order picking. Also monitors freezer conditions.

Kevin White — Warehouse Associate — kevin.white@prairiestar.com — Slack: @k.white — Shift: 06:00–14:30 CT

Same responsibilities as Sarah Kim. Also assists with truck loading.

Brandon Keller — Dispatcher / Route Planner — brandon.keller@prairiestar.com — Slack: @b.keller — Shift: 05:30–14:30 CT

Coordinate with Brandon on order availability for next-day routes. He needs to know about holds, shortages, and any SKU that may not be available.

Luis Ramirez — Lead Driver — luis.ramirez@prairiestar.com — Slack: @l.ramirez — Shift: 06:00–15:00 CT

Lead driver handling high-volume routes. May interact during loading if there are product questions.

Receiving Slack Channels:

- **#receiving-houston** — real-time receiving updates, arrivals, completions, flags
- **#dc-escalations** (Houston thread) — P1/P2 events, escalations

Freezer Zones:

Zone	Type	Temp Target	Acceptable Range	Contents
H-A	Long-term storage	-20°F	-22°F to -18°F	Core (Signature) line pints
H-B	Long-term storage	-20°F	-22°F to -18°F	Specialty line pints

H-C	Long-term storage	-20°F	-22°F to -18°F	Seasonal pints, all sandwich products
H-D	Staging	-10°F	-15°F to -5°F	Picked orders staged for loading
H-Q	Quarantine	-20°F	-22°F to -18°F	Quarantined product only (rear of Zone H-D)

1.5 Shreveport Distribution Center

Site Location: 4501 Industrial Park Drive, Shreveport, LA 71115

Main Phone: (607) 808-9079

Renee Dubois — DC Manager — renee.dubois@prairiestar.com — Slack: @r.dubois — Shift: 06:00–16:00 CT

Same authority and responsibilities as Carlos Mendoza at Houston.

Wyatt Green — Inventory & Receiving Coordinator — wyatt.green@prairiestar.com — Slack: @w.green — Shift: 06:00–15:00 CT

On-site coordinator. Same role as Alicia Nguyen at Houston.

Olivia Bennett — Warehouse Associate (Senior) — olivia.bennett@prairiestar.com — Slack: @o.bennett — Shift: 06:00–14:30 CT

Only Warehouse Associate at Shreveport. Handles all receiving, put-away, cycle counts, and order picking. Task prioritization is critical since there is no second associate.

Dylan Harper — Dispatcher / Route Planner — dylan.harper@prairiestar.com — Slack: @d.harper — Shift: 05:30–14:30 CT

Same coordination role as Brandon Keller at Houston.

Receiving Slack Channels:

- **#receiving-shreveport** — real-time receiving updates, arrivals, completions, flags
- **#dc-escalations** (Shreveport thread) — P1/P2 events, escalations

Freezer Zones:

Zone	Type	Temp Target	Acceptable Range	Contents
S-A	Long-term storage	-20°F	-22°F to -18°F	Core (Signature) line pints
S-B	Long-term storage	-20°F	-22°F to -18°F	Specialty, seasonal, sandwich products
S-C	Staging	-10°F	-15°F to -5°F	Picked orders staged for loading

S-Q	Quarantine	-20°F	-22°F to -18°F	Quarantined product only (adjacent to Zone S-C)
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1.6 Slack Channels Reference

Channel	Purpose	Who Monitors
#receiving-houston	Houston inbound receiving: arrivals, counts, temperatures, completions, flags	Houston Coordinator, DC Manager, Analyst
#receiving-shreveport	Shreveport inbound receiving: arrivals, counts, temperatures, completions, flags	Shreveport Coordinator, DC Manager, Analyst
#cold-chain-alerts	Temperature excursions, freezer zone alarms, cold chain breaches at either DC	Analyst, both DC Managers, Jacob Patel
#waco-production-coord	Variance issues, manifest questions, communication with Waco production	Analyst, Jacob Patel, both DC Managers
#inventory-ops	Cycle count results, expiry flags, inventory adjustments	Analyst, both DC Managers, Hannah Brooks
#dc-escalations	P1 and P2 priority events, escalations requiring Director attention	Analyst, both DC Managers, Daniel Reyes

1.7 Communication Rules

Use **Slack** for real-time alerts, shift updates, quick confirmations, status checks, and channel-based announcements. Use **Email** for formal notifications requiring a record, incident reports, credit claims, adjustment approvals, end-of-shift summary, and responses to external parties.

Urgent (P1) Events: Send a Slack direct message with "URGENT:" prefix at the start, followed by a formal email within the same hour.

Email Subject Line Format: [Priority] – [Category] – [Source] [Reference#] – [Date].

Examples: "P1 – Temperature Excursion – Inbound Waco Manifest 2026-04-15-001 – 2026-04-15" or "P3 – Variance Notification – Inbound Waco Manifest 2026-04-15-002 – 2026-04-15."

Slack Threading: Always start a thread for multi-message updates to a single receipt or event. Tag relevant people: @c.mendoza (Houston DC Manager), @r.dubois (Shreveport DC Manager), @a.nguyen (Houston IRC), @w.green (Shreveport IRC). Do not use @channel or @here unless P1 event.

2. Product Reference

2.1 Signature Line (Core Flavors) — Pints

SKU	Product Name	Case Pack	Case Wt.	Shelf Life	Zone (H)	Zone (S)	Notes
SC-001	Sweet Cream Prairie	8 pt	12 lbs	18 months	H-A	S-A	Flagship product. Highest volume.
SC-002	Vanilla Bean Constellation	8 pt	12 lbs	18 months	H-A	S-A	
SC-003	Midnight Chocolate Range	8 pt	12.5 lbs	18 months	H-A	S-A	Slightly heavier due to density.
SC-004	Strawberry Windfall	8 pt	12 lbs	18 months	H-A	S-A	Contains fruit inclusions.
SC-005	Roasted Pecan Homestead	8 pt	12.5 lbs	18 months	H-A	S-A	Contains tree nut allergen.
SC-006	Salted Honey Drift	8 pt	12 lbs	18 months	H-A	S-A	
SC-007	Golden Caramel Prairie Fire	8 pt	12 lbs	18 months	H-A	S-A	
SC-008	Mint Meadow Cream	8 pt	12 lbs	18 months	H-A	S-A	
SC-009	Blackberry Dusk	8 pt	12 lbs	18 months	H-A	S-A	Contains fruit inclusions.
SC-010	Buttercream Horizon	8 pt	12 lbs	18 months	H-A	S-A	

2.2 Specialty Line (Rotating Flavors) — Pints

SKU	Product Name	Case Pack	Case Wt.	Shelf Life	Zone (H)	Zone (S)	Notes
SP-001	Lavender Cream Moonrise	8 pt	12 lbs	15 months	H-B	S-B	Rotating. Check availability with Waco.

SP-002	Olive Oil & Sea Salt Meridian	8 pt	12 lbs	15 months	H-B	S-B	Premium ingredients, lower volume.
SP-003	Burnt Sugar & Bourbon Ember	8 pt	12.5 lbs	15 months	H-B	S-B	Contains alcohol flavoring. No allergen.
SP-004	Goat Milk Fig Reverie	8 pt	12 lbs	12 months	H-B	S-B	Shorter shelf life — goat milk base.
SP-005	Coffee Cardamom Caravan	8 pt	12 lbs	15 months	H-B	S-B	Contains caffeine.

2.3 Seasonal Line — Pints

SKU	Product Name	Case Pack	Case Wt.	Shelf Life	Zone (H)	Zone (S)	Notes
SN-001	Blossom & Cream Jubilee	8 pt	12 lbs	12 months	H-C	S-B	Spring. Available Feb–May.
SN-002	Suncrest Peach Rodeo	8 pt	12 lbs	12 months	H-C	S-B	Summer. Available May–Sep.
SN-003	Harvest Moon Pumpkin & Spice	8 pt	12.5 lbs	12 months	H-C	S-B	Fall. Available Aug–Nov.
SN-004	Fireside Peppermint Bark	8 pt	12.5 lbs	12 months	H-C	S-B	Winter. Available Oct–Feb.

2.4 Ice Cream Sandwich Line — Core

SKU	Product Name	Case Pack	Case Wt.	Shelf Life	Zone (H)	Zone (S)	Notes
SW-001	The Prairie Standard	12 ct	9 lbs	12 months	H-C	S-B	Vanilla bean ice cream, oat cookie.
SW-002	Midnight Stack	12 ct	9.5 lbs	12 months	H-C	S-B	Chocolate ice cream,

							chocolate cookie.
SW-003	Salted Honey Press	12 ct	9 lbs	12 months	H-C	S-B	Salted honey ice cream, shortbread.

2.5 Ice Cream Sandwich Line — Specialty

SKU	Product Name	Case Pack	Case Wt.	Shelf Life	Zone (H)	Zone (S)	Notes
SW-004	The Orchard Fold	12 ct	9 lbs	9 months	H-C	S-B	Apple-cinnamon, oat cookie. Shorter shelf life.
SW-005	Campfire Velvet	12 ct	9.5 lbs	9 months	H-C	S-B	S'mores-inspired. Marshmallow inclusions.
SW-006	Moonrise Macaron	12 ct	8.5 lbs	9 months	H-C	S-B	Lavender cream, macaron shell. Fragile — handle carefully.
SW-007	Pecan Trail Double	12 ct	10 lbs	9 months	H-C	S-B	Double-stacked. Heaviest sandwich case. Tree nut allergen.

2.6 Lot Code Format

All Prairie Star products carry a lot code in the format: **[Line]-[YYYYMMDD]-[Sequence]**

- **Line:** A single letter identifying the production line. A = main pint line. B = specialty pint line. C = sandwich line.
- **Date:** The production date in YYYYMMDD format.
- **Sequence:** A two-digit number indicating the batch sequence for that line on that date. 01 = first batch, 02 = second batch, etc.

The lot code is printed on the case (bottom panel) and on each individual consumer unit. When the Analyst processes receiving data, verify that the lot code reported by the dock crew matches the lot code on the transfer manifest. Any mismatch is a **P3 event** — log it and notify the DC Manager.

2.7 SKU-to-Zone Assignment Rules

When the Analyst receives put-away confirmation from the dock crew, verify that product was placed in the correct zone using these rules:

- **Signature Line (SC-001 to SC-010):** Assign to H-A or S-A (core long-term storage)
- **Specialty Line (SP-001 to SP-005):** Assign to H-B or S-B (specialty long-term storage)
- **Seasonal Line (SN-001 to SN-004):** Assign to H-C or S-B (Shreveport uses S-B, Houston uses H-C)
- **All Sandwich Products (SW-001 to SW-007):** Assign to H-C or S-B (Shreveport uses S-B, Houston uses H-C)

Long-term storage zones (A, B, C for Houston; A, B for Shreveport) are set to -20°F.

Staging zones (H-D, S-C) are set to -10°F and are for picked orders only — not for long-term product placement.

3. Outside Vendor Reference

Prairie Star's DCs receive shipments from the following outside vendors for non-product materials. Before processing any vendor shipment, pull vendor_master.xlsx and review vendor-specific notes and known issues.

Code	Vendor Name	Category	Lead Time	Delivery Day	Notes
PKG-01	Gulf Coast Packaging	Packaging — pint containers & lids	5 business days	Tuesdays	High volume. Historically reliable. Count lids separately — lids have been short in past.
PKG-02	Southern Wrap Co.	Packaging — sandwich wrappers & cartons	7 business days	Thursdays	Wrapper rolls are fragile. Inspect for crush damage.
DRY-01	Heartland Bakery Supply	Dry goods — waffle cones, cookie shells	10 business days	Mondays	Temperature-sensitive: waffle cones must not be exposed to moisture. Store in dry storage only.
DRY-02	Lone Star Toppings Co.	Dry goods — toppings, inclusions	7 business days	Wednesdays	Allergen alert: some items contain tree nuts and peanuts. Verify

					allergen labeling on receipt.
CLN-01	CleanPro Industrial	Cleaning supplies & sanitation chemicals	3 business days	Fridays	SDS (Safety Data Sheets) must accompany every delivery. Reject if SDS is missing.
ICE-01	Arctic Express	Dry ice	Same-day / next-day	As needed	Dry ice is delivered in insulated totes. Weight verification required. Do not handle without PPE (insulated gloves). Variance threshold is weight-based: ± 5 lbs acceptable, >5 lbs flag, >20 lbs reject.
PAL-01	TexPal Logistics	Pallets — new and refurbished	5 business days	Bi-weekly (1st & 15th)	Inspect for splinters, broken slats, stains, pest evidence. Reject any pallet that cannot safely hold 1,500 lbs.

Important Note on Dry Ice (ICE-01): Uses a **weight-based variance threshold** instead of standard case-count thresholds (Section 7). Acceptable variance: ± 5 lbs (P4). Variance >5 lbs but ≤ 20 lbs: P3 – flag and notify vendor. Variance >20 lbs: P2 – reject the delivery and escalate per Section 14.

4. Files and Systems

The following files are the Analyst's working documents. Each file has a defined purpose, and you must use the correct file for each task. Do not create personal copies or informal tracking documents — all work is recorded in these official files.

inbound_receiving_log.xlsx — Master receiving log. One row per inbound shipment (Waco and vendor). Columns: receipt date, manifest/PO number, origin, total pallets, total cases, temperature readings, variance, damage notes, disposition, status, notes. Open rows indicate pending items. Used for every inbound receipt from arrival through closeout.

transfer_manifests/ — Folder of PDFs. One transfer manifest per Waco shipment, filed by date: YYYY-MM-DD-[seq].pdf. Cross-reference against dock crew's reported counts and lot codes. Read-only.

vendor_pos/ — Folder of PDFs. Vendor purchase orders and packing slips, one per shipment, filed by vendor and date: [VendorCode]-PO-[number].pdf. Cross-reference against dock crew's reported counts. Read-only.

inventory_master.xlsx — System of record for on-hand inventory. Columns: SKU, product name, lot code, expiry date, quantity (cases), zone, pallet position, status (Active/Hold/Quarantine), receipt date, last counted date, notes. Updated after every put-away confirmation. Used for SKU-to-zone verification and FEFO enforcement.

cycle_count_log.xlsx — Cycle count program management. Tabs: Schedule (cadence assignments by zone/SKU), Counts (individual count records with date, zone, SKU, counter name, system qty, physical qty, variance, recount results, adjustment approval), Monthly Summary (accuracy rate by zone). Updated with results immediately after each count.

expiry_tracker.xlsx — Lot-level expiry monitoring. Columns: SKU, lot code, expiry date, days remaining (formula), status flag (Green >45 / Yellow 31-45 / Orange 15-30 / Red 8-14 / Black 1-7 / Expired o), current zone, quantity, disposition (if any), disposition date, authorizer. Reviewed every Monday. Updated after every put-away.

temperature_log.xlsx — Freezer zone temperature records. Columns: date, time, zone, reading (°F), method (scheduled/alarm/spot-check), within range (Y/N), action taken (if out of range), initials. One tab per month. Updated twice per shift: once at shift start and once at end-of-shift. Additional entries required for zone excursions.

incident_reports/ — Folder of Word documents. One document per incident, filed as: IR-[seq]-[YYYY-MM-DD]-[category].docx. Created when required by priority level (P1, P2, P3 with quarantine, or credit claims).

vendor_master.xlsx — Outside vendor directory. Columns: vendor code, company name, category, primary contact name, email, phone, account number, payment terms, standard lead time, usual delivery day(s), performance notes, last updated date. Consulted before every vendor receiving.

vendor_scorecard.xlsx — Vendor performance tracking. Columns: vendor code, quarter, total deliveries, on-time count, on-time %, quality pass count, quality %, fill rate %, open claims count, trend notes. Updated after every vendor receipt. At the end of each calendar quarter, calculate quarterly aggregates: On-Time % = (on-time deliveries ÷ total deliveries) × 100; Quality % = (receipts with zero damage or variance ÷ total) × 100.

5. Priority and Severity Matrix

Every event that deviates from normal operations is assigned a priority level. The priority level determines how fast you must respond, who you must notify, and what documentation is required. Four priority levels are defined, from P1 (most severe) to P4 (least severe).

When you encounter an event (reported by dock crew), find the row in this matrix that best matches what is being reported. If the event could fit into more than one priority level, always choose the higher (more severe) level. It is better to over-escalate than to under-escalate.

5.1 P1 — Critical

Definition: Immediate risk to product safety, food safety, or major financial exposure. The situation is actively getting worse and will cause significant harm if not addressed within minutes.

Response Time: Immediate (within 15 minutes)

Examples:

- Product received >+10°F (above safe frozen range) — immediate rejection and contamination concern
- Freezer zone temperature above 0°F for more than 15 minutes (system failure) — product at risk
- Severe inbound load damage: container breached, visible contamination, pest evidence (Class 4 damage)
- Broken or missing seal on a Waco transfer trailer with no explanation
- Structural failure in a freezer zone (collapsed racking, ceiling leak onto product)
- Contamination discovery: foreign material, pest evidence, chemical exposure on or near product

Notification Requirements:

- Slack DM to DC Manager with "URGENT:" prefix, immediately
- Email to the Director of Supply Chain (cc: DC Manager, the Production Planner if Waco transfer) within same hour
- Slack post to #cold-chain-alerts or #dc-escalations
- Include condition details in written report

Documentation Requirements:

- Incident report required (Word template)
- Log entry in receiving log with "P1 – [Description]" status
- Detailed written description of condition

Product Action:

- **Full rejection.** Do not unload. Request return transportation immediately.
- Notify Waco (if Waco transfer) or vendor (if outside vendor) of rejection and reason.
- Initiate credit claim or return order.

- If contamination suspected, quarantine and escalate to the Director of Supply Chain for potential product recall assessment.

5.2 P2 — Urgent

Definition: Significant quality or safety concern that requires escalation and may result in partial or full rejection. Less immediate than P1 but must be resolved within the same shift.

Response Time: Within 1–2 hours

Examples:

- Inbound product temperature +1°F to +10°F (warm but technically frozen; requires quarantine and assessment)
- Major quantity variance (>10 cases or >3% of shipment)
- Truck seal broken or appears tampered with (unauthorized access concern)
- Damage class 3 (product container breached on one or few cases — potential contamination concern)
- Freezer zone temperature at -15°F or warmer for more than 15 minutes (but zone has not yet crossed 0°F)
- Cycle count variance exceeding 5 cases or \$500 in value
- Expired product discovered in active inventory (should have been caught by expiry monitoring)
- Seal number mismatch on a Waco transfer that has already been opened

Notification Requirements:

- Email to the Director of Supply Chain (cc: DC Manager, relevant vendor contact) within same hour
- Slack post to #dc-escalations thread with "P2" prefix

Slack message format: "P[Priority] escalation. [Event type]. Manifest/Reference [#]. Detail: [brief description]. Escalated to [recipient]. Incident report: [status]. Action required: [brief description]."

- If inbound Waco, also notify the Production Planner
- Include condition details in written report

Documentation Requirements:

- Incident report required (Word template)
- Log entry in receiving log with "P2 – [Description]" status
- Supporting documentation (written condition description, temperature readings if applicable)

Product Action:

- **Quarantine** pending assessment. Hold product in H-Q or S-Q until Director decision received.
- May result in full rejection, partial rejection (salvageable portion isolated), or conditional acceptance with note.
- Notify origin (Waco or vendor) and initiate claim if applicable.

5.3 P3 — Moderate

Definition: Quality issue that can be handled per standard procedure but requires documentation and notification to stakeholders. Does not necessarily result in rejection; may require conditional acceptance or expedited outbound.

Response Time: Within 4 hours (same shift)

Examples:

- Inbound product temperature -4°F to 0°F (slightly warm but within acceptable conditional range; accept but flag expiry monitoring)
- Moderate quantity variance (4-10 cases or 1-3% of shipment)
- Damage class 2 (outer case compromised, but product containers intact; isolation and inspection required)
- Lot code mismatch on cases (physical case differs from manifest)
- Inbound short-dated product (arriving with <45 days to expiry; flag for accelerated outbound)
- Freezer zone temperature between -18°F and -15°F (minor zone excursion)
- A P3 pattern: the same P4 event recurring three or more times in 30 days (e.g., a vendor that has been 1-2 cases short on three consecutive deliveries)
- Expiry tracker shows a lot entering orange status (15-30 days remaining)

Notification Requirements:

- Email notification to relevant stakeholders (DC Manager, the Production Planner if Waco, vendor if outside vendor)
- Slack post to relevant channel (e.g., #waco-production-coord for Waco variance, #receiving-[site] for general flags)
- Update receiving log with P3 notation

Documentation Requirements:

- Incident report required if quarantine is initiated
- Log entry in receiving log with "P3 – [Description]" status
- Update expiry_tracker if short-dated product
- Update vendor_scorecard if vendor issue

Product Action:

- **Conditional acceptance.** Proceed with put-away but flag in inventory_master.xlsx and/or expiry_tracker.xlsx for heightened monitoring.
- If temperature-related: update expiry_tracker to yellow or orange tier; notify demand planning of potential accelerated outbound.
- If damage class 2: visually inspect cases, isolate damaged cases to quarantine, mark inventory record.
- If variance: hold receipt open pending variance resolution and remain in contact with origin.

5.4 P4 — Low

Definition: Minor discrepancy that does not affect product safety or cold chain integrity. Log and monitor; no escalation required unless pattern emerges.

Response Time: Within 8 hours (end of shift)

Examples:

- Inbound product temperature $\leq -10^{\circ}\text{F}$ (optimal or acceptable; standard acceptance)
- Minor quantity variance (1-3 cases and $\leq 1\%$ of shipment)
- Damage class 1 (cosmetic only — label torn, corner dent; no container breach)
- One-time vendor delivery delay of < 2 hours (not part of pattern)
- Temperature reading taken slightly out of protocol (thermometer not perfectly centered in case, but reading still valid)
- Packing slip formatting issue that does not affect identification (minor discrepancy resolved verbally)

Notification Requirements:

- Log in receiving log with "P4 – [Description]"
- No email required unless logging takes time (in which case, batch into end-of-shift email)
- Slack post only if relevant to broader operational context

Documentation Requirements:

- Log entry in receiving log
- No incident report required
- No escalation required

Product Action:

- **Accept.** Proceed with standard put-away and inventory update.
- Accept with note (note minor issue in receiving log for future reference).

5.5 When in Doubt

- **Compound events:** If a single shipment has two P3 events simultaneously (e.g., a minor temperature excursion and a moderate variance), treat the combined event as P2.
- **Pattern escalation:** A single minor variance from a vendor is P4. A third minor variance from the same vendor in a month is ~~P2~~**P3**. Patterns escalate.
- **Round up rule:** If an event could reasonably fit two priority levels, choose the higher level. Over-escalation is never penalized. Under-escalation can damage customer relationships or create safety risks.

6. Temperature Acceptance Table

6.1 Background and Measurement Protocol

Ice cream is one of the most temperature-sensitive frozen products. Unlike frozen vegetables or meat, ice cream begins to lose structural integrity — developing ice crystals and textural defects — at temperatures above -10°F . By 0°F , the product may still be technically frozen but has likely experienced thawing sufficient to affect customer experience. Above 0°F , the product is refreezing territory where visible defects emerge. Above $+10^{\circ}\text{F}$, the product is no longer safely frozen.

Prairie Star stores product at -20°F. Product leaves the Waco production facility at -20°F or colder. During transport on a well-maintained reefer truck (4-6 hour run from Waco to Houston/Shreveport), some warming is inevitable — every time a truck door opens, ambient air enters. A well-executed transfer should deliver product at -15°F to -10°F. Anything warmer indicates a potential problem: reefer unit malfunction, extended stop, door left open, or transit delay.

The Analyst receives temperature data from the dock crew. The on-site Inventory & Receiving Coordinator or Warehouse Associate follows this protocol:

1. Use a calibrated digital probe thermometer (calibration sticker must be current).
2. Take three pulp temperature readings per load: one case from the front of the trailer (nearest the doors — typically warmest), one from the middle, and one from the rear (nearest the reefer unit — typically coldest). Insert the probe between cases so it contacts the product surface through the case wall. Hold for 15 seconds or until the reading stabilizes.
3. Record all three readings in inbound_receiving_log.xlsx.
4. The warmest of the three readings is the controlling measurement. Use this value to determine the tier.
5. Decimal readings: round to the nearest whole degree. When a reading falls exactly on a tier boundary, round toward the warmer tier (conservative choice). Examples: -4.5°F rounds to -4°F (Tier 3). -10.5°F rounds to -10°F (Tier 1). 0.5°F rounds to +1°F (Tier 4).

The Analyst applies the readings to the table below to determine the correct action tier.

6.2 Acceptance Tiers

Tier	Temperature Range	Acceptance	Priority	Action
Tier 1	≤ -10°F	Accept	P4	Log all three readings in inbound_receiving_log.xlsx. Proceed with pallet count and put-away.
Tier 2	-9°F to -5°F	Accept with Note	P4	Log all three readings. Proceed with put-away. Note in receiving log "Accepted – Warm side of acceptable range" for future reference.
Tier 3	-4°F to 0°F	Accept Conditionally	P3	Log all three readings. Flag lot in expiry_tracker.xlsx: move to yellow tier and increase monitoring frequency. Email the Production Planner with manifest number, temperature readings, and note that product is flagged for enhanced expiry monitoring. Do not reject. Proceed with put-away to assigned zone but note in inventory_master.xlsx "temperature flag – expedite outbound."

Tier 4	+1°F to +10°F	Quarantine	P2	Log all three readings. DO NOT proceed with standard put-away. Quarantine entire receipt in H-Q or S-Q. Email the Director of Supply Chain and DC Manager immediately with readings, manifest number, and statement "Product quarantined pending assessment." Slack post to #cold-chain-alerts. Hold for Director assessment before proceeding. Slack message format: "Inbound load temp excursion. Manifest [#]: readings [temp1], [temp2], [temp3]°F. Tier: [classification]. Disposition: [Accept/Quarantine/Reject]. Email sent to [recipients]."
Tier 5	> +10°F	Reject	P1	Log all three readings. DO NOT unload. URGENT Slack DM to DC Manager with "URGENT:" prefix. Email the Director of Supply Chain, DC Manager, and the Production Planner within same hour with readings, manifest number, and recommendation to reject. Slack post to #cold-chain-alerts and #dc-escalations. Request immediate return transportation. Initiate credit claim (Waco) or return shipment (vendor). Treat as potential contamination concern.

6.3 Special Cases

Vendor Non-Temperature Items (Packaging, Dry Goods, Cleaning Supplies): These shipments do not contain frozen product and do not require temperature measurement. Accept upon physical verification of count and condition.

Staging Dock Re-Evaluation: Product on the staging dock (H-D or S-C) is subject to time limits: maximum 30 minutes when ambient dock temperature is $\leq 35^{\circ}\text{F}$, maximum 15 minutes when ambient is $> 35^{\circ}\text{F}$. The Coordinator reports ambient dock temperature (from wall-mounted thermometer) when product is staged and when removed. If product exceeds these limits, it must be returned to a freezer storage zone and a pulp temperature reading taken. If pulp temperature has risen above -10°F , apply this acceptance table as if the product were being received inbound. Document the pulp reading and all event details in an incident report.

Multiple Readings, Multiple Lots: If an inbound receipt contains multiple Waco transfers (multiple manifests), each manifest has its own three temperature readings. Apply the acceptance table independently to each manifest's warmest reading. If one lot is Tier 1 and another is Tier 3, the Tier 3 lot is flagged for enhanced monitoring while the Tier 1 lot proceeds normally.

7. Quantity Variance Table

7.1 How to Calculate Variance

Variance is the difference between the manifest quantity (what was supposed to arrive) and the actual quantity counted by the dock crew (what arrived). Variance is expressed in two ways:

- 1. Absolute variance:** Total number of cases over or under (e.g., +5 cases, -3 cases)
- 2. Percentage variance:** Variance as a percentage of the manifest quantity (e.g., +2% of 500 cases = +10 cases)

Calculation:

- Absolute variance = Actual cases – Manifest cases
- Percentage variance = $(\text{Absolute variance} \div \text{Manifest cases total manifest case count}) \times 100$
- Note: “Manifest cases” always refers to the total case count for the entire manifest shipment, not the per-SKU case count. For example, if a manifest lists 400 total cases across three SKUs and 1 case is short on one SKU, the percentage variance is $-1 \div 400 = -0.25\%$, not $-1 \div [\text{SKU qty}]$.

7.2 Variance Tiers

Absolute Variance	Percentage Variance	Classification	Priority	Action
0 cases	0%	Exact Match	P4	Log in receiving log: variance = 0. Close receipt. No further action.
1–3 cases	AND $\leq 1\%$	Minor	P4	Log in receiving log with variance noted. Accept receipt. Monitor in future for pattern. If this is the third minor variance from the same vendor in 30 days, escalate to P3 and notify vendor.
4–10 cases	OR 1–3%	Moderate	P3	Log in receiving log with variance noted. Email origin (the Production Planner for Waco, vendor for outside vendor) and cc DC manager with manifest number, variance detail, and request for explanation or credit. Hold receipt open as "Pending

				Variance Resolution." Check for response daily. When response arrives, close receipt or adjust per origin decision.
>10 cases	OR >3%	Major	P2	Log in receiving log with variance noted. Email the Director of Supply Chain (cc: DC Manager, origin contact) immediately with manifest number, variance detail, and request for immediate investigation. Slack post to #waco-production-coord (if Waco) or #dc-escalations (if vendor). Hold receipt open as "Pending Major Variance Investigation." Do not close until Director approves closure or adjustment. Slack message format: "Variance detected. Manifest [#], SKU [SKU]: [variance detail]. Variance tier: [Minor/Moderate/Major]. Email sent. Status: [Open – Pending response / Resolved]."

7.3 Mixed-SKU Variances

When a single inbound receipt contains multiple SKUs and variances appear on some SKUs but not others:

- Calculate variance for each SKU independently.
- Apply the variance table to each SKU's variance.
- If SKU-A has a 5-case variance (Moderate) and SKU-B has an 8-case variance (Moderate), log both and escalate the overall receipt as "Moderate variance on multiple SKUs."
- If one SKU has a Major variance and another has a Minor variance, escalate the receipt to P2 (the higher priority applies to the overall receipt).

7.4 Recurring Minor Variances

If a vendor has a pattern of recurring minor variances (1–3 case shortages recurring three or more times within a rolling 30-day window, per Section 5.3), even though each individual variance is <1%, escalate the overall pattern to P3. Send an email to the vendor's account manager (via the Procurement Specialist if contract-related) noting the pattern and requesting investigation or corrective action. Update the vendor_scorecard.xlsx to reflect pattern

recognition. When posting the S3 Slack message for a pattern escalation, include only the temperature and variance data from the current triggering delivery — do not include information from the prior deliveries in the Slack post.

8. Expiry Management Tiers

The Analyst maintains an expiry_tracker.xlsx with one row per product lot (SKU + lot code). The tracker contains:

- SKU and lot code
- Zone location
- Received date
- Production date (from lot code)
- Expiry date (calculated as production date + shelf life)
- Days remaining until expiry (calculated daily)
- Current tier (green/yellow/orange/red/black/expired)
- Monitoring status and notes

Weekly, the Analyst runs an expiry review. Pull the expiry_tracker, calculate days remaining for every active lot, and apply the tiers below. Update the tracker with new tier assignments and required notifications.

Every time a new lot is put away (dock crew confirms put-away), the Analyst adds the lot to the expiry_tracker upon put-away confirmation (same shift).

8.1 Expiry Tiers

Tier	Days to Expiry	Description	Action	Frequency
Green	>45 days	Normal inventory. No monitoring required.	Log in expiry_tracker. Proceed with normal outbound prioritization.	Weekly review.
Yellow	31–45 days	Product approaching window. Begin monitoring for demand.	Log in expiry_tracker. Yellow tier. Email the Demand Planning Manager with SKU, lot code, location, days remaining, and current inventory. Request forecast status and acceleration recommendation if	Weekly review.

			demand is below target.	
Orange	15–30 days	Product on watch. Accelerate outbound.	Log in expiry_tracker. Orange tier. Email Demand Planning Manager (the Demand Planning Manager) and DC Manager with SKU, lot code, location, days remaining, and current inventory. Request accelerated outbound or suggest accounts with short lead times.	Weekly review + daily check when entered.
Red	8–14 days	Product at risk. Escalate for disposition decision.	Log in expiry_tracker. Red tier. Email the Director of Supply Chain (cc: DC Manager, Demand Planning Manager) with SKU, lot code, location, days remaining, and current inventory on hand. Request current sales velocity from the Demand Planning Manager and urgent disposition decision: accelerated outbound, transfer to other DC, markdown/discount promotion, or donation.	Weekly review + daily check when entered.
Black	1–7 days	Product critical. Escalate to Director for immediate disposition.	Log in expiry_tracker. Black tier. Email the Director of Supply Chain immediately with SKU, lot code, location, days remaining, inventory, and options: (1) emergency accelerated outbound (same-	Daily check minimum. Twice daily if <3 days.

			day delivery), (2) transfer to other DC if time permits, (3) markdown/discount emergency promotion, (4) donation, or (5) waste. Do not proceed with standard warehousing. Await Director decision.	
Expired	0 or past	Product past expiry date. Remove from saleable inventory.	Log in expiry_tracker. Expired. Quarantine immediately in H-Q or S-Q. Do not outbound any expired product. Notify DC Manager. Email the Director of Supply Chain and Demand Planning with disposition: donation, waste/destruction, or other compliance method. Document destruction per food safety requirements.	Immediate upon discovery.

8.2 Inbound Short-Dated Product

When inbound product arrives with less than 45 days to expiry (Tier Yellow or worse upon arrival), this is a P3 event (per Section 5.3). Apply P3 response time (within 4 hours of put-away confirmation) for the notifications below:

1. Log in expiry_tracker and assign appropriate tier upon put-away confirmation.
2. Send email to the Production Planner and Demand Planning Manager noting "Inbound short-dated product – [SKU, lot code, days to expiry]" and requesting prioritization in outbound.
3. If <15 days upon arrival (Orange or lower), also email the Director of Supply Chain and request immediate demand plan.
4. Proceed with put-away to assigned zone per Section 2.7, but add note to inventory_master.xlsx "SHORT-DATED – ACCELERATE OUTBOUND."

9. Damage Disposition Rules

The Analyst receives damage reports from the dock crew describing the condition, location, and extent of damage to a shipment or individual pallets. The Analyst classifies the damage using the rules below and initiates the appropriate response.

9.1 Damage Class Definitions

Class	Definition	Examples	Priority	Immediate Action
Class 1	Cosmetic damage only. Product container intact, no breach, no contamination visible. Exterior only — label tear, corner dent, minor crush, scuff marks, missing ink marking.	Case label torn, corner of case dented, small stain on exterior only.	P4	Accept with note. Log in receiving log "Class 1 damage." No quarantine. Proceed with put-away. No credit claim.
Class 2	Outer case compromised but product containers intact. Hole or tear in case exterior, water damage visible on exterior, compression damage opening one edge of case, but no visible damage to the inner product containers (pint cups or sandwich wrappers are dry and intact).	Case has a 2-inch hole in side, case is soaked on one edge but inner wrapping is dry, case corner is crushed but product is not dented.	P3	Quarantine suspected affected cases. Unload all other cases normally. Document damage in writing (describe location, extent, what is compromised). Email vendor (if vendor shipment) or notify the Production Planner (if Waco). Perform visual inspection of inner product; if confirmed intact, may proceed to put-away with note. If cannot confirm integrity, hold in quarantine pending visual inspection by quality team or disposition decision. Initiate credit claim for affected cases.

Class 3	Product container breached on one or few cases. Individual pint cup cracked, dent visible on a pint cup, sandwich wrapper punctured, but damage is limited to a small number of cases within the pallet.	One case within a pallet has a cracked pint cup, two sandwich cases have wrapper tears.	P2	Quarantine affected cases immediately. Document in writing: which case(s), what damage, extent. Email vendor or the Production Planner with damage report. Detailed written description required. Isolate damaged cases to H-Q or S-Q. Do not outbound damaged product. Initiate credit claim. Assess if undamaged cases in same pallet are safe (if damage is from handling at DC, other cases are fine; if damage is from transport, assess for other hidden damage).
Class 4	Contamination or major breach. Product contamination visible (mold, pest evidence, foreign material), multiple cases damaged such that product integrity is compromised, or evidence of unauthorized access/tampering.	Visible mold inside case, pest droppings visible, multiple punctured containers, rodent evidence on pallet, seal appears tampered.	P1	DO NOT unload. Quarantine entire pallet/receipt. URGENT Slack DM to DC Manager with "URGENT:" prefix. Email the Director of Supply Chain, DC Manager, and quality team (if applicable) with "DO NOT PROCESS – Class 4 contamination" and description. Request immediate assessment. Do not proceed until Director decision. Prepare incident report documenting contamination evidence. Likely

				result: full rejection and return.
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9.2 Damage Discovered During Receiving

When the dock crew reports damage during the receiving process:

- 1. Classify the damage** using the table above.
- 2. Apply the Priority Level** — this determines notification and escalation speed.
- 3. Log the damage** in inbound_receiving_log.xlsx with class and description.
- 4. For Class 1:** Note and proceed.
- 5. For Class 2 or 3:** Quarantine affected cases, document in writing, email relevant parties, initiate credit claim.
- 6. For Class 4:** Quarantine entire receipt, escalate immediately per P1 rules.

10. Cycle Count Variance Thresholds

10.1 Estimating Dollar Value

When a cycle count reveals a variance (physical count differs from system count), the Analyst estimates the dollar value of the variance to determine the severity tier:

Dollar value = Variance (cases) × Case weight × \$0.50 per pound

The \$0.50 per pound is a standard estimate for ice cream case cost; product cost varies, but this is a working average.

10.2 Variance Tiers

Variance (Cases)	Dollar Value	Classification	Priority	Action
0 cases	\$0	Exact Match	P4	Log in cycle_count_log.xlsx: variance = 0, counter name, date. No adjustment needed. Target accuracy rate: 100%.
1–2 cases	< \$100	Minor	P4	Log in cycle_count_log.xlsx with variance, counter name, date. Verify count manually (visual recount, not system). If recount confirms variance, the Analyst may approve the

				adjustment without further authorization. Update inventory_master.xlsx. Target accuracy rate: 98%.
3–5 cases	\$100–\$500	Moderate	P3	Log in cycle_count_log.xlsx with variance, counter name, date. Assign a different person to perform a recount (different eyes catch errors). If recount confirms variance, prepare adjustment request and email DC Manager for approval before processing. Update inventory_master.xlsx only after approval. Target accuracy rate: 98%.
>5 cases	> \$500	Major	P2	Log in cycle_count_log.xlsx with variance, counter name, date. Assign a different person to perform a recount. If recount again confirms variance, prepare adjustment request and email the Director of Supply Chain (cc: DC Manager, the Inventory Analyst (HQ)) with SKU, location, original count, recount, system variance, dollar value, and recommended adjustment. Await approval. Do not adjust until Director approval received.

10.3 Accuracy Rate Tracking

The Analyst tracks inventory accuracy by zone and SKU. After every cycle count round:

1. Calculate accuracy = (Number of exact matches ÷ Total SKUs counted) × 100

2. Log in cycle_count_log.xlsx: zone, count date, total SKUs counted, matches, variance count, accuracy percentage
3. Weekly review: analyze accuracy trends. Target is 98% or higher.
4. If accuracy falls below 98% in any zone, investigate root causes (Coordinator put-away errors, unlogged transfers, system entry errors) and escalate to DC Manager.

11. Escalation Chain

The Analyst's escalation pathway is clear and unambiguous:

Escalation Level	Who	When	Examples
Level 1	Analyst handles per SOP	Routine decisions within thresholds (P4, P3 variances within procedure, standard expiry actions)	Receiving a Tier 1 temperature load, processing a P4 variance, assigning a cycle count, sending standard emails per template
Level 2	DC Manager	P2 events, policy questions, missing guidance, personnel issues, escalations from staff	P2 variance, inbound damage class 2-3, freezer temperature excursion lasting >30 minutes, incident report review
Level 3	Director of Supply Chain (the Director of Supply Chain)	P1 events, load rejections, major variances (>\$500), expiry disposition on red/black product, vendor contract issues, cross-DC policy decisions	P1 temperature event, P2 variance >\$500, inbound class 4 contamination, disposition decision on black-tier expiry, vendor escalation
Level 4	VP / Executive	Strategic supply chain decisions, policy changes, major vendor relationships, compliance escalations	(Referenced but not contacted directly by Analyst)

Escalation is not a failure. It is the correct action. The escalation pathway exists to ensure every decision receives appropriate authority and oversight.

12. Processing Inbound Waco Transfers

This procedure describes how the Analyst processes receiving reports for inbound Waco transfers. The dock crew (Coordinator and Warehouse Associates) perform the physical operations: unload, measure temperatures, count pallets, inspect seals, verify lot codes, and direct put-away. The Analyst receives the crew's data and applies decision thresholds.

12.1 Pre-Arrival (Before Truck Arrives)

1. **Check calendar** for scheduled Waco transfers.
2. **Pull the transfer manifest** from the transfer_manifests/ folder. Verify it is for today's date and matches the scheduled delivery time.
3. **Pre-fill one row in inbound_receiving_log.xlsx** with: receipt date (today), manifest number, origin ("Waco Transfer"), manifest total pallets, manifest total cases, and set temperature readings, variance, and status fields to "pending."
4. **Post to #receiving-[site] Slack channel** using Template S1 (Inbound Arrival): "Waco transfer [manifest#] expected at [time]. Pallets: [#], Cases: [#]. Dock crew standing by."
5. **Notify the Coordinator** via Slack that the manifest is ready and to send temperature, count, and damage data when receiving is complete.

12.2 Dock Crew Reports Receiving Data

The Coordinator will send you (the Analyst) receiving data via Slack (preferred) or email. The report includes:

- **Seal status:** Intact / Broken / Tampered
- **Temperature readings:** Three readings (front, middle, rear per Section 6.1 protocol) and average
- **Pallet count:** Actual pallets unloaded
- **Case count by SKU:** Breakdown if shipment contains multiple SKUs
- **Lot codes received:** List of lot codes on cases (should match manifest)
- **Damage observations:** Any damage class, location, extent
- **Notes:** Anything unusual

Example Slack report from Coordinator:

@analyst Manifest 2026-04-15-001 receiving complete. Seal: intact. Temps: -18, -16, -20 (avg -18). Pallets: 24. Cases: 480 (all SC-001). Lot codes: A-20260410-01 (24 cases), A-20260410-02 (456 cases) ✓ match manifest. No damage. Ready for put-away.

12.3 Apply Temperature Acceptance Table (Section 6)

Receive the three temperature readings and average. Look up the average in Section 6.2:

- **Tier 1 ($\leq -10^{\circ}\text{F}$):** Accept. Proceed.
- **Tier 2 (-9 to -5°F):** Accept with note. Proceed. Note in receiving log.
- **Tier 3 (-4 to 0°F):** Accept conditionally. Flag in expiry_tracker. Email the Production Planner. Proceed to put-away with note in inventory_master.xlsx.
- **Tier 4 ($+1$ to $+10^{\circ}\text{F}$):** Quarantine. Do not proceed. Email the Director of Supply Chain and DC Manager. Hold for assessment.

- **Tier 5 (>+10°F):** Reject. URGENT escalation. Email the Director of Supply Chain, DC Manager, the Production Planner. Do not unload.

12.4 Calculate Quantity Variance (Section 7)

Compare the manifest quantities to the actual counts reported by the dock crew:

- **0 cases:** Exact match. Log and proceed.
- **1-3 cases and ≤1%:** Minor variance. Log and proceed. Note in receiving log.
- **4-10 cases or 1-3%:** Moderate variance. Log, email the Production Planner with variance detail, and hold receipt open pending response.
- **>10 cases or >3%:** Major variance. Log, email the Director of Supply Chain (cc: DC Manager, the Production Planner), and hold receipt open pending investigation.

12.5 Verify Lot Codes

Confirm that the lot codes reported by the dock crew match the lot codes on the manifest:

- **Match:** Proceed.
- **Mismatch (e.g., manifest shows A-20260410-01 but received cases show A-20260409-01):** P3 event. Log in receiving log "Lot code mismatch – manifest [code] vs received [code]." Email the Production Planner and DC Manager with discrepancy. Hold receipt open pending clarification.
- **Lot code illegible or missing:** P3 event. Request dock crew to verify lot code on cases and report back. Hold receipt open.

12.6 Update Inventory Records

Once dock crew confirms all data is accurate (seals, temperatures, counts, lot codes):

inbound_receiving_log.xlsx: Fill in all temperature readings, average, variance, lot codes, and damage notes. Set status to "Received – Pending Put-Away" or "Put-Away Complete" when dock crew confirms put-away.

inventory_master.xlsx (after put-away confirmation): Add a row for each lot code received with SKU, zone, lot code, case count, received date, and expiry date (production date + shelf life from Section 2). Set status to "Active." Add notes if Tier 3 temperature or P3 variance is pending resolution.

expiry_tracker.xlsx (upon put-away): Add a row for each lot code with lot code, zone, received date, production date (from lot code), expiry date, and days remaining. Assign the initial tier (green/yellow/orange/red/black). Set monitor status to "Monitored."

12.7 Send Required Notifications

Based on the priority level, send notifications per the rules in Section 5:

- **P4 (clean receipt, Tier 1 temperature, exact match):** Post to #receiving-[site] using Template S2 (Receipt Complete – Clean). Send email using Template E1 for audit trail. Example: "Manifest 2026-04-15-001 received and accepted. Pallets: 24, Cases: 480, Temp: -18°F (avg), Variance: 0. Product in H-A. ✓"
- **P3 (Tier 3 temperature or Minor/Moderate variance):** Post to #receiving-[site] using Template S3 (Receipt with Flags). Email relevant parties (the Production Planner, DC

Manager, etc.). Template S3 format: "Variance detected. Manifest [#] received with flags. Temp: [warmest pulp temperature rounded] ([priority]). Variance: [number] cases. Email sent to the Production Planner and DC Manager." If the receipt is being escalated to P3 because it is the third minor variance from the same origin in 30 days, include only the temperature and variance information from the current (third, triggering) delivery — do not reference the prior two deliveries in the Slack post.

- **P2 (Tier 4 temperature, Major variance, Class 2-3 damage):** Email the Director of Supply Chain and DC Manager immediately. Post to #dc-escalations (P2 – [description]). Hold receipt open pending assessment.
- **P1 (Tier 5 temperature, Class 4 contamination, major emergency):** URGENT Slack DM to DC Manager with "URGENT:" prefix. Email the Director of Supply Chain, DC Manager, and the Production Planner within same hour. Post to #cold-chain-alerts and #dc-escalations.

12.8 Close the Receipt

Once all pending items are resolved (variance response received, temperature assessment complete, damage documentation finished), update inbound_receiving_log.xlsx:

- Set status to "Closed – Accepted" or "Closed – Rejected" or "Closed – Conditional"
- Mark receipt date as closed (red highlight or checkbox)
- Post final confirmation to #receiving-[site] Slack channel

Do not close if items remain pending. Keep the status open (e.g., "Open – Pending Variance Resolution") until fully resolved.

13. Processing Vendor Shipments

This procedure describes how the Analyst processes receiving reports for outside vendor shipments (packaging, dry goods, cleaning supplies, dry ice, pallets). The dock crew reports data; the Analyst applies decision thresholds, updates records, and manages vendor performance tracking.

13.1 Pre-Arrival

- 1. Check calendar** for scheduled vendor deliveries.
- 2. Pull the PO and packing slip** from vendor_pos/ folder. Verify vendor, delivery date, SKUs/quantities, and delivery address.
- 3. Check vendor_master.xlsx** for vendor-specific notes, known issues, and special handling requirements (e.g., "Gulf Coast Packaging — count lids separately, high shortage history" or "CleanPro Industrial — must include SDS with every delivery").
- 4. Pre-fill one row in inbound_receiving_log.xlsx** with: receipt date (today), PO number, origin (vendor name), expected quantities from PO, and set status to "Pre-arrival."
- 5. No Slack post required for routine vendor deliveries** (unless special circumstance).

13.2 Dock Crew Reports Receiving Data

The Coordinator reports:

- **Delivery time and truck information** (if relevant)
- **Case count by SKU** (actual vs. PO)
- **Condition assessment:** Packaging intact, any crush damage, moisture damage, pest evidence
- **Special items verification:**
 - Lids counted separately (if packaging vendor)
 - Dry ice weight verified (if Arctic Express)
 - SDS present (if CleanPro)
 - Pallet condition verified (if TexPal)
- **Damage observations** if any

Example report:

@analyst PO 54821 Gulf Coast Packaging received. 40 cases pint containers, 50 cases lids (counted separately). All cases intact, no damage. Weights match invoice. Ready to move to dry storage.

13.3 Apply Variance Thresholds

For standard vendor shipments (packaging, dry goods, pallets): Use the Quantity Variance Table (Section 7).

For dry ice (Arctic Express): Use weight-based variance (Section 3).

- ±5 lbs acceptable (P4 – no action)
- >5 lbs but ≤20 lbs (P3 – flag and notify vendor)
- >20 lbs (P2 – reject and escalate per Section 14)

13.4 Update Records

- 1. Update inbound_receiving_log.xlsx:** Fill in actual quantities, variance, condition notes, and status.
- 2. Update vendor_scorecard.xlsx:** Record on-time delivery (yes/no), quantity variance (any over/under), damage rate (class if present), responsiveness, and update overall vendor rating trend.
- 3. Update vendor_master.xlsx** if vendor-specific notes change (new contact, new SDS requirement, etc.)

13.5 Send Notifications

- **P4 (clean receipt, no variance, no damage):** Log in receiving log. No Slack post or email required.
- **P3 (Minor/Moderate variance, damage class 1):** Email vendor with variance detail and request credit note or explanation. Example: "PO 54821 – received 38 cases of lids, PO shows 40. Request credit note for 2 cases or confirmation of correct order quantity."
- **P2 (Major variance, Class 2-3 damage):** Email vendor and the Director of Supply Chain with details. Initiate credit claim if applicable.
- **P1 (Class 4 contamination):** Do not accept. Escalate immediately per P1 rules.

13.6 Close the Receipt

Once variance is resolved or acknowledged, update status to "Closed – [Disposition]" in receiving log.

14. Rejection Processing

When dock crew reports conditions requiring rejection or partial rejection, the Analyst initiates the formal rejection process.

14.1 Full Rejection

When to initiate: Temperature Tier 5, Class 4 contamination, or other P1 condition where the entire receipt cannot be accepted.

1. Do not unload. Coordinate with dock crew to keep product on truck or in sealed staging area.

2. Log in receiving log: Status = "Rejected – [Reason]"

3. Email the origin immediately:

- **Waco transfer:** Email the Production Planner, cc the Director of Supply Chain and DC Manager. Use template E4 (Waco Rejection). Subject: "P1 – Load Rejection – Waco Manifest [#] – [Date]". Body: manifest number, reason for rejection (temperature, damage, contamination), temperature readings if applicable, and statement "Recommend immediate return transportation."

Slack message format: "[Origin] receipt [Manifest/PO#] REJECTED. Reason: [Temp / Contamination / Major variance]. Product held on truck pending return authorization. Email sent to [origin contact and Director]."

- **Vendor:** Email vendor (use contact from vendor_master.xlsx), cc the Director of Supply Chain and the Procurement Specialist. Use template E7 (Vendor Rejection). Subject: "[Priority] – Shipment Rejection – PO [#] – [Date]". Body: PO number, reason, requested action (return or scrap), and reference for credit claim.

4. Arrange return transportation: Coordinate with DC Manager to request return shipment to origin. Reefer truck for Waco (temp-controlled); regular truck for non-perishable vendor items.

5. Document condition: If contamination or damage visible, include written description. If Tier 5 temperature, include readings in email.

6. Initiate credit claim: See Section 18 (Damage and Claims Processing).

14.2 Partial Rejection

When to initiate: Temperature Tier 4 (quarantine), Class 2-3 damage affecting some cases but not entire pallet, or major variance on one SKU within a mixed shipment.

1. Separate affected cases to H-Q or S-Q quarantine area.

2. Accept undamaged/good-quality cases for put-away to assigned zones.

3. Log in receiving log: Status = "Partially Rejected – [Affected SKU and cases] – [Reason]. Remaining cases accepted."

4. Assess quarantined product:

- **Tier 4 temperature:** Hold for the Director of Supply Chain's assessment. Email the Director of Supply Chain and DC Manager with temperature readings and recommendation. May result in full rejection, conditional acceptance, or re-measurement after stabilization. Response expectation: the Director of Supply Chain will respond within 4 hours. If no response within 4 hours, email a follow-up and cc DC Manager. If no response within 8 hours, DC Manager may authorize a disposition decision (conditional acceptance with monitoring, or continued quarantine) as interim approver.

- **Class 2-3 damage:** Hold for visual inspection. If confirmed containment breach or contamination, reject those cases and process credit claim. If confirmed surface damage only, may accept with note.

5. Email origin (the Production Planner for Waco, vendor contact for vendor) with detail on which cases/SKUs are affected, reason, and current status (quarantined pending assessment or confirmed rejection).

6. Initiate credit claim for affected cases once disposition is final.

15. Inventory Management and FEFO

15.1 SKU-to-Zone Assignment

After dock crew confirms put-away, the Analyst verifies that product was placed in the correct zone using the rules in Section 2.7:

- **Signature Line (SC-001 to SC-010):** H-A or S-A
- **Specialty Line (SP-001 to SP-005):** H-B or S-B
- **Seasonal (SN-001 to SN-004):** H-C or S-B
- **Sandwiches (SW-001 to SW-007):** H-C or S-B

When dock crew's put-away confirmation arrives, verify the zone assignment in the message. If incorrect, immediately Slack the Coordinator: "@a.nguyen Please confirm zone assignment for [SKU, lot code] — should be H-B, not H-A. Will update records once confirmed."

15.2 FEFO Enforcement

FEFO (First Expired, First Out) means older product is picked for outbound before newer product. The Analyst enforces FEFO by maintaining inventory_master.xlsx with accurate lot codes and expiry dates, and by flagging short-dated product for accelerated outbound.

1. After put-away confirmation, add the new lot to inventory_master.xlsx with:

- SKU, zone, lot code, case count, received date, expiry date (production date + shelf life from Section 2)

2. When reviewing outbound requests, note if the system is picking newer product before older product. If so, flag to DC Manager for correction in picking logic.

3. For short-dated product (arriving in Yellow, Orange, Red, or Black tier), add note in inventory_master.xlsx "ACCELERATE OUTBOUND – SHORT-DATED" so pickers prioritize.

15.3 Overflow Management

If a zone reaches capacity and product must be placed in overflow location:

1. Log in inventory_master.xlsx: Zone = "[Primary Zone] – Overflow at [Alternate Zone]"

2. Email DC Manager: "Zone H-A at capacity. SC-001 lot [code] placed in overflow at [location]. Recommend outbound acceleration or transfer to Shreveport."

3. Track overflow duration: If overflow persists >2 weeks, escalate to the Director of Supply Chain for inter-DC transfer or production adjustment discussion.

15.4 Pallet Tag Verification

After dock crew completes put-away, they will have applied tags to pallets identifying SKU, lot code, case count, and zone. The Analyst verifies tag accuracy by cross-referencing the put-away confirmation against inventory_master.xlsx. Discrepancies are flagged during cycle count analysis.

16. Cycle Count Program

16.1 Count Cadences

The Analyst assigns cycle counts at the following frequencies:

Cadence	Frequency	Scope	Assigned By	Purpose
Daily Count	Every shift	3–5 high-velocity SKUs (SC-001, SC-002, SC-003, SP-001, SW-001)	Analyst	Verify accuracy on fastest-moving product to catch errors immediately
Weekly Rotation	Once per week per zone	Each zone counted once per week (H-A, H-B, H-C, H-D, etc.)	Analyst	Comprehensive zone audit
Monthly Zone Count	Once per month per zone	Complete zone inventory recount	Analyst	Deep audit, full reconciliation
Quarterly Wall-to-Wall	Once per quarter	Every SKU in every zone	Analyst + DC Manager	Full inventory reconciliation for audit readiness

16.2 Count Execution

- 1. Assign count via Slack:** the assigned counter – "Daily count assigned: H-A high-velocity count. SKUs: SC-001, SC-002, SC-003. Please count and report results. Use cycle_count_log.xlsx."
- Slack message format:** "Daily count completed. [Zone], [SKU]: System [qty] vs Physical [qty]. Variance: [#] cases / \$[value]. Result: [Match / Recount assigned / Adjustment approved]."
- 2. Counter performs physical count** (warehouse staff role, not Analyst).
- 3. Counter reports results** via Slack message or email with: SKU, zone, system quantity, physical quantity, counter name, date/time.
- 4. Analyst receives results** and logs in cycle_count_log.xlsx: zone, SKU, system qty, physical qty, variance, counter name, date.

16.3 Recount Protocol

If a cycle count reveals a variance:

- 1. For minor variances** (1-2 cases, <\$100): Analyst may approve adjustment directly (within authority).
- 2. For moderate variances** (3-5 cases, \$100-\$500): Assign a **different person** to perform a recount. If recount confirms variance, email DC Manager for approval before adjusting.
- 3. For major variances** (>5 cases, >\$500): Assign a different person to recount. If recount confirms variance, email the Director of Supply Chain for approval before adjusting.

Recount rule: Never adjust based on a single count. Always verify with a second count by a different person.

16.4 Inventory Adjustment Process

Once a variance is confirmed and approved:

- 1. Prepare adjustment request** with: SKU, zone, system quantity, physical count, variance, dollar value, counter names, recount confirmation.
- 2. Email to the Director of Supply Chain** (cc: DC Manager, the Inventory Analyst (HQ)) if >\$500.
- 3. Upon approval** (email reply or Slack confirmation from the Director of Supply Chain, or DC Manager acting on his behalf), update inventory_master.xlsx and system (via the Inventory Analyst (HQ) if system-level change is required). If no response within 2 business days, email a follow-up with subject "FOLLOW-UP: Adjustment Approval Needed – [SKU] – [Date]" and cc DC Manager. If no response within 4 business days total, DC Manager may authorize the adjustment as interim approver.
- 4. Log in cycle_count_log.xlsx:** Adjustment = "Approved – [Date]" and mark record as closed.

16.5 Weekly Reporting

Weekly, the Analyst sends an email to DC Manager and the Director of Supply Chain with:

- **Accuracy Rate by Zone:** (Exact matches ÷ Total SKUs counted) × 100
- **Variance Summary:** Total variances, total dollar value, breakdown by tier
- **Recount Results:** Any recounts performed and outcomes
- **Trends:** Improving accuracy, new patterns, zones requiring attention

17. Expiry Monitoring and Action

17.1 Weekly Expiry Review

Weekly:

1. **Open expiry_tracker.xlsx.**
 2. **For every active lot**, recalculate days remaining (Expiry date – Today) and assign the new tier per Section 8 thresholds.
 3. **Identify new escalations** — any lot moving from Green to Yellow, Yellow to Orange, Orange to Red, or Red to Black.
 4. **For new Red and Black tiers**, email immediately per templates E11 and E12. Do not wait for end-of-week — send within 2 hours of the review.
- Slack message format:** "Expiry tier change. [SKU] [Lot code]: Days remaining [#]. New tier: [Tier name]. Email notification sent. Status: [Pending demand plan / Pending disposition decision]."

17.2 Daily Expiry Checks

1. **Each morning**, review any new lots added to inventory during previous day's put-away.
2. **Calculate days remaining** on new lots and assign tier immediately.
3. **Flag any inbound short-dated product** (arriving with <45 days) in inventory_master.xlsx.
4. **Review any lots in Black tier** — these require twice-daily checks.

17.3 Disposition Execution

When a lot requires disposition (Red or Black tier):

1. **Email the Director of Supply Chain** with: SKU, lot code, location, days remaining, total cases, sales velocity (cases per day from Demand Planning), and the following disposition options: (1) accelerated outbound (immediate/same-day delivery to accounts), (2) transfer to other DC (if time permits), (3) markdown/discount promotion (reduce wholesale price), (4) donation (to food bank or nonprofit), or (5) waste/destruction (last resort, with food safety documentation).
2. **Await Director decision** and proceed per his direction.
3. **Document in expiry_tracker.xlsx:** Disposition = "[Decision]", Status = "Disposition Initiated" or "Disposition Complete"
4. **Update inventory_master.xlsx** and inventory system when disposition is executed (moved to different account, transferred to other DC, etc.).

18. Damage and Claims Processing

18.1 Damage Report Classification

When dock crew reports damage, the Analyst classifies it using Section 9 and logs in receiving log.

18.2 Credit Claim Initiation

For Class 1 damage: No claim required. Log and note.

For Class 2, 3, or 4 damage:

1. Determine claim amount: # of damaged cases × case weight × \$0.50/lb (same as cycle count variance estimate).

2. Prepare credit claim email:

- **For Waco transfers:** Use template E8. To: the Production Planner, cc: the Director of Supply Chain, DC Manager. Subject: "Credit Claim – Damage Class [#] – Manifest [#] – [Date]". Body: manifest number, damage class, number of affected cases, damage description (written), total claim amount, and account adjustment request.

- **For vendor shipments:** Use template E9. To: vendor contact (from vendor_master.xlsx), cc: the Director of Supply Chain, the Procurement Specialist. Subject: "Credit Claim – Damage Class [#] – PO [#] – [Date]". Body: PO number, damage class, number of affected cases, damage description, total claim amount, and request for credit note or replacement shipment.

3. Log in receiving log: Open claim status = "Claim – [Amount] – Sent [Date]"

4. Track response deadline: Waco typically responds within 2 business days. Vendors typically respond within 5 business days. Note expected response date in receiving log.

18.3 Tracking Open Claims

The Analyst maintains a list of open claims in a "Claims Tracker" section of the receiving log (or separate sheet):

- Manifest/PO number
- Claim amount
- Damage class
- Date sent
- Origin (Waco or vendor)
- Status (Sent, Acknowledged, Approved, Credited, Closed)

Every Friday, review open claims. If no response within expected timeframe:

- Email origin with subject "Follow-Up: Credit Claim – [Manifest/PO] – Status?"
- If claim is >30 days old with no response, escalate to the Director of Supply Chain.

19. Temperature Excursion Processing

19.1 Freezer Zone Excursion

When: A freezer zone temperature reading falls outside the acceptable range for more than 15 minutes.

Coordinator reports: "H-A temp alarmed at -25°F, then climbed to -18°F over 45 minutes. Currently -22°F. No alarm reset."

Analyst action:

- 1. Log in temperature_log.xlsx:** Zone, time, temperature reading, status = "Excursion – [Duration and extent]"
- 2. Classify severity:** If within acceptable range but trending (e.g., -22°F to -18°F when target is -20°F), this is P4 — log and monitor. If outside acceptable range for less than 30 minutes, this is P3 — email DC Manager and log. If outside acceptable range for more than 30 minutes (e.g., climb from -20°F to -10°F over 2 hours), this is P2 — email the Director of Supply Chain and DC Manager, post to #cold-chain-alerts. If temperature rises above -10°F in long-term storage, this is P1 — URGENT escalation.
- Slack message format:** "Zone [Zone] temperature excursion. Readings: [time/temp pairs]. Duration: [#] min. Status: [In range now / Escalating / Maintenance requested]. Email sent to [recipients]."
- 3. Email content:** "Zone [zone] temperature excursion: readings [time/temp pairs], duration, current status. Recommend [maintenance check / compressor service / investigation]."
- 4. Recommended action:** DC Manager or maintenance to inspect compressor, thermostat, and reefer unit for malfunction.
- 5. Monitor:** If excursion is <15 minutes and temperature recovers, log and continue. If excursion repeats, escalate.

19.2 Staging Dock Temperature Event

When: Product on the staging dock (H-D or S-C, setpoint -10°F, acceptable -15 to -5°F) arrives above acceptable range or warms above -5°F while staged.

Example report from dock crew: "Product staged in H-D at 08:00. Ambient dock temp 32°F. Product still on dock at 08:45 — exceeded 30-minute limit. Pulp re-reading: -8°F."

Analyst action:

- 1. Check time limit:** Was product on the staging dock longer than the permitted window (30 min at ≤35°F, 15 min at >35°F)?
- 2. If time limit exceeded and pulp temperature is still ≤-10°F:** Log in temperature_log.xlsx as "Staging dock time exceedance — temp within range." P4. Proceed with outbound.
- 3. If time limit exceeded and pulp temperature is above -10°F:** Apply the Temperature Acceptance Table (Section 6) as if this were a new inbound receipt. Document the pulp reading and event details in an incident report. Escalate per the tier that applies.
- 4. If product is within time limit:** No action needed. Proceed with normal outbound scheduling.

19.3 Inbound Load Events

Handled during receiving processing (Section 12). Apply Temperature Acceptance Table.

20. End-of-Shift Documentation

The closing documentation routine ensures all work is documented, pending items are tracked, and upcoming priority items are flagged. Complete the following steps in sequence.

20.1 Final Temperature Log Review

Step 1:

1. **Pull temperature_log.xlsx.**
2. **Review all temperature readings taken today** across all zones (H-A, H-B, H-C, H-D, H-Q, S-A, S-B, S-C, S-Q).
3. **Flag any readings outside acceptable range** and confirm escalation status (P3, P2, or P1 email sent if applicable).
4. **Note any zone trending:** If a zone's morning reading was -20°F and evening reading is -18°F, note the trend for DC Manager awareness.

20.2 Receiving Log Closeout

Step 2:

1. **Pull inbound_receiving_log.xlsx.**
2. **Identify any open receipts** (status not "Closed").
3. **For each open receipt, document pending status.** Examples: "Open – Pending Variance Resolution – Awaiting response from Waco (expected 4/17)," "Open – Pending Tier 4 Assessment – Quarantined pending Director decision," or "Open – Pending Damage Claim Response – Class 2 claim sent 4/15 (expected 4/17)."
4. **Do not force-close receipts.** Pending status tells next shift exactly what is being waited on.

20.3 Reconciliation

Step 3:

1. **Compare day's inbound schedule** (calendar) to actual receipts logged.
2. **Verify all expected inbound has arrived** or note which shipments are delayed/rescheduled.
3. **Check for any unscheduled inbound** (surprise vendor delivery, emergency transfer) and confirm it is logged.

20.4 Tomorrow's Preview

Step 4:

1. **Check calendar for tomorrow's scheduled inbound.**
2. **Identify any pre-work needed:** Pull transfer manifests or POs, check vendor_master.xlsx for special notes, and flag any inbound that requires special handling (short-dated product, new vendor, repeat issue vendor).

3. **Note in end-of-shift email** if tomorrow requires early preparation.

20.5 Dispatcher Coordination

Step 5:

1. **Confirm today's order availability with Dispatcher.**
- "Tomorrow's delivery routes scheduled. Any holds or urgent SKUs short?"
2. **Note any SKU shortages or overstock** for demand planning discussion next week.

20.6 End-of-Shift Handoff Email

Send email using template E15:

Subject: End-of-Shift Handoff – [Date] – [Site]

Required content: Daily summary of all inbound receipts processed (manifest/PO number, cases, temperature tier, variance, status). Open items with pending status and expected resolution dates. Expiry monitoring status (any tier changes, new flags). Freezer zone status (all nominal, or note any excursions/trends). Cycle count progress (counts completed, matches, variances, recounts pending). Tomorrow's preview (scheduled inbound, pre-work needed). Escalations (if any, with current status).

20.7 End-of-Shift Slack Post

Post to #receiving-[site]:

S2 (Clean Day): "EOD Summary [date]. 2 inbound receipts processed (1 Waco, 1 vendor). All clean, no flags. Cycle counts on schedule. Zones normal. Ready for tomorrow."

S3 (With Flags): "EOD Summary [date]. 2 inbound receipts: Manifest 2026-04-15-001 clean. PO 54821 received with variance flag (+6 lbs dry ice, awaiting vendor response). Open claims: 1 pending. Zones normal. Cycle counts on schedule."

21. Incident Report Procedure

21.1 When Required

Incident reports are required for:

- **P1 events:** All critical incidents (temperature >+10°F, contamination, rejection, major emergency)
- **P2 events:** All urgent incidents (quarantine, major variance, vendor non-response)
- **P3 events:** Only if quarantine is initiated (e.g., Class 2 damage held pending assessment, Tier 4 temperature pending reassessment)
- **Credit claims:** One report per claim for amounts >\$500

21.2 Procedure

- 1. Create document** using the Word incident report template. File naming: IR-[seq]-[YYYY-MM-DD]-[category].docx. Example: IR-001-2026-04-15-Temperature-Excursion.docx. The sequence number increments for each incident report created, resetting to 001 on January 1 each year. Count only reports actually filed per Section 21.1, not all events. Category options: Temperature, Damage, Variance, Contamination, Rejection, etc.
- 2. Complete required fields:** Date and time of incident; location (zone, manifest/PO number, site); priority level (P1/P2/P3); description of what happened as reported by dock crew; actions taken (escalation emails sent, quarantine initiated, etc.); notifications sent (who was emailed/Slacked and when); current status (closed, pending assessment, awaiting Director decision); and attachments (temperature readings, written condition description, variance detail).
- 3. Route for review.** For P1/P2 events, submit to DC Manager immediately (same day) — DC Manager forwards to the Director of Supply Chain if applicable. For P3 events, submit to DC Manager within 24 hours. For credit claims, submit with the claim email.
- 4. File:** Save in incident_reports/ folder on shared drive. Maintain folder structure by year and month (incident_reports/2026/04/IR-*.docx).

22. Email Templates

The following email templates are referenced throughout this SOP. The structure and required fields must be preserved.

E1 — Waco Transfer: Receipt Confirmation

Subject: P4 – Receipt Confirmation – [Manifest#] – [Date]

Required fields: manifest number, total pallets, total cases, temperature readings (all three + average), variance (if any), status, lot codes received, notes (if any).

E2 — Waco Transfer: Variance Notification

Subject: [Priority] – Variance Notification – [Manifest#] – [Date]

Required fields: manifest number, SKU(s) affected, manifest qty, actual qty, variance (absolute and %), classification (Minor/Moderate/Major), request for explanation or credit.

E3 — Waco Transfer: Temperature Excursion Notification

Subject: [Priority] – Temperature Excursion – [Manifest#] – [Date]

Required fields: manifest number, temperature readings, tier classification, product disposition (accepted, quarantined, rejected), and requested action.

E4 — Waco Transfer: Load Rejection

Subject: P1 – Load Rejection – [Manifest#] – [Date]

Required fields: manifest number, reason for rejection (temperature, damage, contamination, fraud), specific findings, and request for return transportation.

E5 — Vendor Shipment: Receipt Confirmation

Subject: P4 – Receipt Confirmation – [PO#] – [Date]

Required fields: PO number, SKUs received, quantities, condition (clean receipt notation), and any special notes.

E6 — Vendor Shipment: Variance Notification

Subject: [Priority] – Variance Notification – [PO#] – [Date]

Required fields: PO number, SKU(s) affected, manifest qty, actual qty, variance, request for credit or explanation.

E7 — Vendor Shipment: Rejection

Subject: [Priority] – Shipment Rejection – [PO#] – [Date]

Required fields: PO number, reason for rejection, specific findings, request for return transportation or credit, and reference number for claim.

E8 — Credit Claim: Waco

Subject: [Priority] – Credit Claim – [Manifest#] – [Date]

Required fields: manifest number, damage class or variance detail, number of affected cases, dollar value, damage description (written), and account adjustment request.

E9 — Credit Claim: Vendor

Subject: [Priority] – Credit Claim – [PO#] – [Date]

Required fields: PO number, damage class or variance detail, number of affected cases, dollar value, damage description, and request for credit note or replacement.

E10 — Expiry Alert: Orange (15–30 Days)

Subject: P3 – Expiry Alert – Orange Tier – [SKU] [Lot Code] – [Date]

Required fields: SKU, lot code, location, days remaining, total cases, current inventory on hand, request for accelerated demand plan (including sales velocity from Demand Planning if available).

E11 — Expiry Escalation: Red (8–14 Days)

Subject: P2 – Expiry Escalation – Red Tier – [SKU] [Lot Code] – [Date]

Required fields: SKU, lot code, location, days remaining, total cases, current inventory on hand, and options (accelerated outbound, transfer, markdown, donation, waste).

E12 — Expiry Disposition Request: Black (1–7 Days)

Subject: P1 – URGENT – Disposition Required – Black Tier – [SKU] [Lot Code] – [Date]

Required fields: SKU, lot code, location, days remaining (specific countdown), total cases, current status, options and urgency note.

E13 — Cycle Count Variance Report

Subject: [Priority] – Cycle Count Variance – [Zone] – [Date]

Required fields: SKU, zone, system qty, physical qty, variance, dollar value, counter name, recount status if applicable.

E14 — Inventory Adjustment Request

Subject: [Priority] – Inventory Adjustment Request – [SKU] – [Date]

Required fields: SKU, zone, system qty, physical qty, variance, dollar value, approval status, and requested system update.

E15 — End-of-Shift Handoff

Subject: P4 – End-of-Shift Handoff – [Date] – [Site]

Required fields: daily summary (inbound processed, key metrics), open items with pending status and expected resolution dates, expiry monitoring status, freezer zone status, cycle count progress, tomorrow's preview, escalations (if any).

Appendix A: Glossary of Key Terms

FEFO: First Expired, First Out. Inventory rotation method where product with earlier expiry dates are picked and shipped before product with later expiry dates.

Lot Code: Unique identifier for a batch of product. Format: [Line]-[Production Date]-[Sequence]. Used to track production date, shelf life, and expiry.

Tier (Temperature): Classification of inbound product temperature determining accept/reject decision (Tier 1-5, Section 6).

Tier (Expiry): Classification of inventory by days remaining until expiry, determining monitoring and disposition urgency (Green/Yellow/Orange/Red/Black, Section 8).

Variance: Difference between manifest quantity and actual received quantity, expressed as absolute number or percentage.

Variance Tier: Classification of variance by severity (Exact Match/Minor/Moderate/Major, Section 7).

Priority Level: Classification of incident by severity and response urgency (P1-P4, Section 5).

Damage Class: Classification of product damage by severity (Class 1-4, Section 9).

Escalation: Routing an issue to a higher-authority person (DC Manager, Director, etc.) for decision-making.

Quarantine: Holding product in a designated zone (H-Q or S-Q) pending assessment or disposition decision.

Credit Claim: Formal request to an origin (Waco or vendor) for financial credit due to damage, variance, or other discrepancy.

Disposition: Final action taken on problematic product (accept, reject, transfer, donate, waste, markdown, etc.).

Expiry Date: Date product is no longer safe or suitable for sale, calculated as Production Date + Shelf Life.

Cold Chain: Continuous temperature control from production through delivery, critical for ice cream integrity.

Reefer Truck: Temperature-controlled truck used for transporting frozen product.

Pallet: Standardized shipping platform (typically 40" × 48") used to stack and move cases in a warehouse.

Case: Standard shipping unit. Prairie Star cases contain either 8 pints, 12 sandwiches, or various quantities of packaging/dry goods.

SKU: Stock Keeping Unit. Unique identifier for a product (e.g., SC-001 = Sweet Cream Prairie, 8-count pint case).

Manifest: Official shipping document for a Waco transfer listing SKUs, quantities, lot codes, and routing.

PO (Purchase Order): Official purchase document for a vendor shipment listing SKUs, quantities, pricing, and delivery terms.

Staging Dock: Loading/unloading area where picked orders are held before outbound shipment. Maintained at -10°F (warmer than long-term storage).

Receiving Dock: Loading/unloading area where inbound product arrives and is initially received and counted.

For questions or situations not covered in this SOP, contact your DC Manager immediately.