



CHECKLIST · DISTRIBUTION & WHOLESALE

Barcode and Scanning Readiness Checklist

The preparation that decides whether a warehouse scanning rollout succeeds: item data, locations, label strategy, and the process decisions to make before hardware arrives.

DISTRIBUTION & WHOLESALE · CHECKLIST

Scanning projects fail in predictable ways, and almost none of the failures involve the scanner. They involve item data that does not match physical product, locations that exist in the building but not the system, and processes that were never actually decided.

This checklist is the preparation work. Do it before the hardware order, not after.

Item data

- ☐ Every active SKU has a barcode: manufacturer UPC or your own
- ☐ Units of measure mapped: each, inner pack, case, pallet, with conversion factors
- ☐ Duplicate and dead SKUs archived so they cannot be scanned into orders
- ☐ Item dimensions and weights populated where slotting will need them

Locations

- ☐ Every pickable location labeled and in the system, one naming scheme
- ☐ Overflow and bulk locations defined, not treated as informal space
- ☐ Quarantine, returns, and staging zones exist in the system
- ☐ Location capacity and slotting reviewed for fast movers

Process decisions

- ☐ Receiving: scan at dock or at putaway? Decide, document, train.
- ☐ Picking: discrete, batch, or wave? Match to your order profile.
- ☐ Short picks and substitutions: exact system behaviour decided
- ☐ Adjustments: who can, above what value, with what approval
- ☐ Cycle counts: frequency and blind-count policy set

Pilot and proof

- ☐ One zone, one process (receiving is usually safest), two weeks
- ☐ Accuracy and speed measured against pre-pilot baseline
- ☐ Exception list reviewed daily during pilot, root causes fixed
- ☐ Go/no-go criteria written down before the pilot starts



Questions about any of this?

Summit Business Systems has been implementing ERP for Ontario businesses since 1991. We are an Acumatica Gold-Certified Partner based in Barrie, working with construction, field service, distribution, and professional services companies across the province. If you want a second opinion on anything in this checklist, we give straight answers.

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