ERSO Shipping/Receiving Process for Heavy Equipment Delivery

This process applies to large, heavy or otherwise unmanageable packages; items on pallets, and large equipment shipments received for ERSO customers and shipped on behalf of ERSO or CED, their associated buildings. Also covered are larger packages for which delivery or access is difficult due to traffic, which require multiple persons or special equipment, or are equipment items needing an asset tag from Central Procurement.

1. Purchasing Coordinator ascertains during requisition creation (from order specifications, vendor, requester or shipper) whether any of the following criteria apply to the shipment:
   - Large or unmanageable size (> 34” any dimension)
   - Heavy weight (> 150 lbs.)
   - Large volume or numerous items (requiring pallet breakdown)
   - Final destination requires delivery across a public surface street e.g., Hearst St. or Bancroft Ave.
   - Purchasing Coordinator researches item to determine relevant attributes above, if the information provided on requisition doesn’t offer details.

2. Purchasing Coordinator provides shipping instructions on PO\(^1\), specifying these in the *External Comments* section of the Req:
   - Deliver directly to the final destination (using ‘Ship To’ address in BearBuy)
   - Liftgate and/or pallet jack required to make delivery
   - *Shipper to alert ERSO Shipping Supervisor 24 hours before delivery for scheduling*
   - *Driver to call ERSO Shipping Supervisor 30 minutes prior to delivery; supervisor will meet delivery truck onsite.* ERSO Shipping Supervisor’s contacts: Mark Bell: 510.693.2355
   - For Equipment Items Only, note: “Deliver direct final destination.” (Asset tagging will be handled locally by ERSO Receiving).

ERSO Shipping & Receiving

If heavy equipment reaches ERSO Shipping/Receiving location, ERSO Shipping Supervisor:

- Completes [Moving Services Request Form;](mailto:) and emails it to [listed Moving Services contact(s),](mailto:) with cc to Purchasing Manager and Budget Analyst;
- Contacts [Moving and Event Services personnel](mailto:) to arrange for pick-up or delivery
  - When possible, request services several days ahead, per instructions provided on form. Moving Services can provide advanced estimates on items weighing over 1,500 lbs.

\(^1\) Suppliers contract with various transportation carriers for item delivery. The supplier is responsible for specifying the exact shipment requirements to the carrier. Every shipment is a legally binding agreement between the supplier and their transportation carrier.

Although we are the final customer, all authority to change the delivery terms (e.g. delivery location or liftgate delivery) resides with the supplier. If changes in shipping instructions are needed after the order has shipped, the Purchasing Agent must notify the supplier of changes in writing, by email or fax. Once the truck arrives at the dock, it is too late to request changes. **For these reasons it is important that shipping instructions from Purchasing staff are accurate when PO is created.**

\(^2\) Central Procurement Address: 3200 Regatta Blvd, Ste E, Richmond, CA 94804