

January 2022 Summary

Release Date: January 2022

The following table contains the counts of the following items related to this release.

#	Change Summary
6	New Product Features
	Release Enhancement
1	Release Fix

LINKS:

[January 2022 Features](#)

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[MSWarehouse Release Highlights](#)

[MSWarehouse Release History](#)

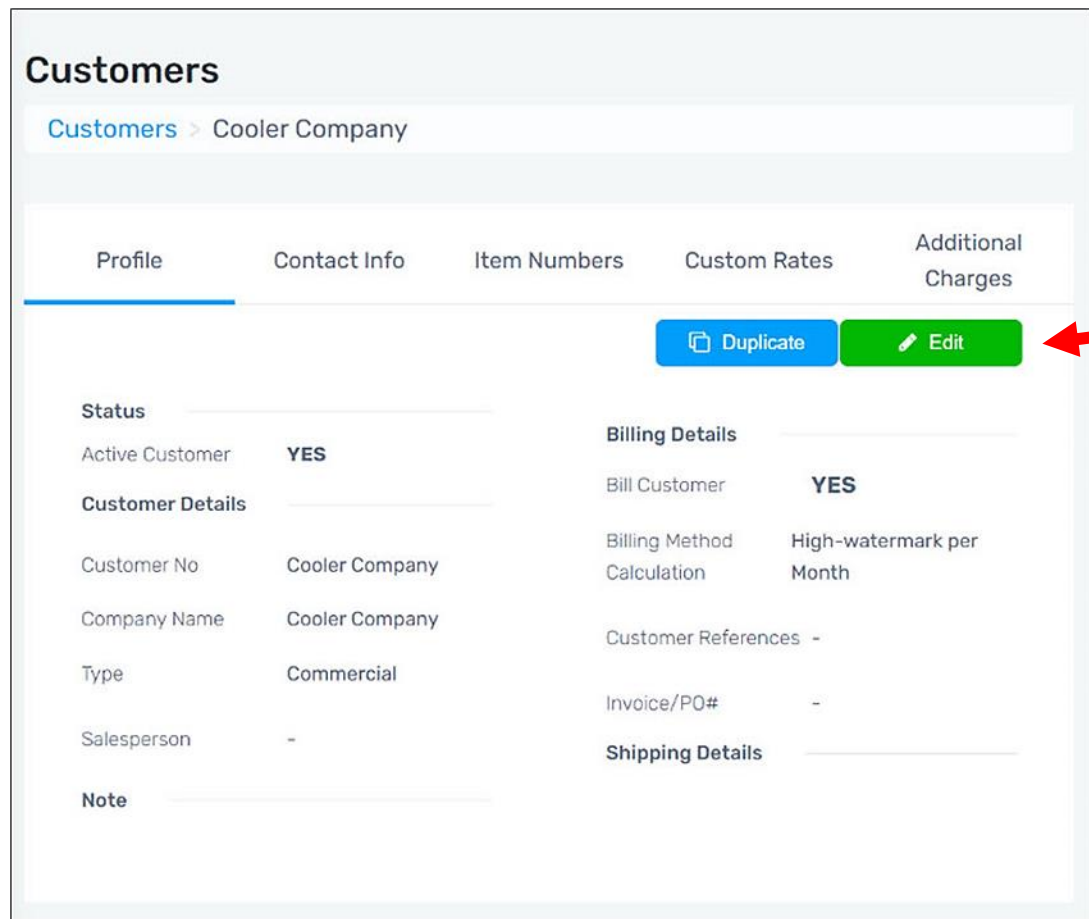
January 2022 Features

Outbound Request

Place restrictions on a customer's account to determine how soon they can enter delivery dates for Requested Outbound transactions.

For your customers that have the ability to enter Requested Outbound transitions on a customer facing web portal, a new field called "Number of business days required for outbound delivery" sets the minimum number of days you require for that customer's Requested Outbound Transaction shipping date. You may enter numbers from 0-7 and be sure not to enter any special characters. The use of this field is optional.

To use this feature, go to setup area: **Homepage > Customers > Choose Customer**. Click the **Edit** Button.



The screenshot shows the 'Customers' management interface. At the top, there's a breadcrumb trail: 'Customers > Cooler Company'. Below this, there are five tabs: 'Profile', 'Contact Info', 'Item Numbers', 'Custom Rates', and 'Additional Charges'. The 'Profile' tab is currently selected. In the top right corner of the profile section, there are two buttons: 'Duplicate' (blue) and 'Edit' (green). A red arrow points to the 'Edit' button. The main content area is divided into two columns. The left column contains 'Status' (Active Customer: YES), 'Customer Details' (Customer No: Cooler Company, Company Name: Cooler Company, Type: Commercial, Salesperson: -), and a 'Note' field. The right column contains 'Billing Details' (Bill Customer: YES, Billing Method Calculation: High-watermark per Month, Customer References: -, Invoice/PO#: -) and a 'Shipping Details' section.

At the bottom of the *Edit Customer* screen, go to the **Number of business days required for outbound delivery** field. Enter a number 0-7 and click **Save**. In the example below, **4** has been entered in this field for this customer who can enter their own Outbound Requested transactions. If they customer was entering a Requested Outbound on Monday, January 24th, the earliest Delivery

date that they can enter will be Friday, January 28th. The system will not allow any delivery date that is earlier than that because they have been restricted to 4 days.

Edit Customer

Profile | Contact Info

Status

Active Customer ☒ Yes

Customer Details

Customer No *
1135

Company Name *
ABC Trucking

Type *
Commercial

Salesperson

Note

Billing Details

Bill Customer ☒ Yes

Billing Method Calculation
☐ Daily ☒ Monthly

Weight per Transaction ☐ No

Flat Customer ☒ Yes

Base Rate
☒ Storage Flat Rate by Month

Customer References
CM65-124-21

Invoice/PO#

Shipping Details

Number of business days required for outbound delivery.

4

Next > Cancel Save

You may change the number of days at any time by clicking the edit button on their Customer profile, entering the new number of days, and clicking **Save**.

REFERENCE: WD-3687

Report

A new report called “Pick Ticket By Item” lists items required for an Outbound transaction by Item Number.

Warehouse personnel can efficiently pick items for an order using this Pick Ticket report. The report is organized by items, which are further organized in alphabetic order.

To use this feature, go to setup area: **Homepage > Outbound > Processing or Completed.** Click the **ellipses** (three dots shown below) to open menu.

Outbound

Transactions > Outbound

Warehouse: Creedmoor Moving Syste

26 Jan, 2022 | Today | Tomorrow | This week | This month | Custom period

☐ Display Deleted Transactions

Search

REQUESTED • 3	PROCESSING • 3	COMPLETED • 1
645 • ABC TRUCKING PO No: - Shipping Time: 01/26/2022 No of Items: 0	611 • STARBURST HOTEL MANAGEMENT GROUP PO No: - Processing Time: 01/26/2022, 08:11 No of Items: 7	662 • BIG JAKE'S BBQ PO No: - Completed Time: 01/26/2022, 14:09 No of Items: 1
646 • BIG JAKE'S BBQ PO No: - Shipping Time: 01/26/2022 No of Items: 0	606 • STARBURST HOTEL MANAGEMENT GROUP PO No: - Processing Time: 01/26/2022, 16:02 No of Items: 3	
647 • CRYING EAGLE BREWERY PO No: - Shipping Time: 01/26/2022 No of Items: 0	663 • CRYING EAGLE BREWERY PO No: - Processing Time: 01/26/2022, 17:15 No of Items: 3	

Here is the menu that appears when the ellipses is clicked (menu shown is the menu found under Processing):

- Edit
- Move to Completed
- Generate Delivery Ticket
- Generate Pick Ticket By Item
- Delete Transaction
- Generate Location Sheet

Choose **Generate Pick Ticket By Item**. This PDF will take a few seconds to generate. It will be available to download on 8 ½" x 11" paper and per your operating system's methods of printing downloads.

NOTE: The gridlines of the Pick Ticket will be fluid according to the width of the name of the *Item* and *Description* per line item. The Description field allows 300 characters so the having the fluidity of the columns supports this.

Pick Ticket				
Transaction No: 663				
CREEDMOOR MOVING SYSTEMS & STORAGE				
Customer CRYING EAGLE BREWERY Requested by: Cody Yarbrough Email: CODY@cryingeagle.com Phone: 337-555-1212 Delivery PO No:			Shipping Carrier: Bill of lading: Shipping date: 01/26/2022 Time frame:	
Special Instructions			Total Item Weight: 1647	
Item	Description	Qty Requested		
G24	Pallet containing 24 Cases of Growlers Clear.			
	Location	Qty Available	Qty Picked	Initial
	AA014RR	1		
	JOE013C	70		
Item	Description	Qty Requested		
Growler Dark	Growler Dark 24 Cases per pallet.	50		
	Location	Qty Available	Qty Picked	Initial
	AA012R	8		
	FDock	41		
	JOE013C	133		
Item	Description	Qty Requested		
Pint Bottle Clear	Pint Bottle Clear 36 cases per pallet			
	Location	Qty Available	Qty Picked	Initial
	AA013C	1		
	AA013L	1		
	F0101	0		
	F0202	1		
	JOE013C	95		
	JOE023C	1		
Date _____ Company Representative _____				

Page 1 of 1

REFERENCE: WD-3723

Duplicate Customer

Easily duplicate Customer information with a new button on the Customer Profile tab called “Duplicate.”

Pressing the Duplicate button will create a new *Customer Account Number* and a new *Customer Name*. The new name will include the prefix “DUP-”. For example, if you duplicate “Colorado Design” the new account number will be named “DUP-Colorado Design.”

The following information is duplicated:

- All profile information
- All contact information
- All custom rate information.

Item Numbers can be transferred using the export/import options.

To use this feature, go to setup area: **Homepage > Customers > Choose Customer**. Click the **Duplicate** Button.

Customers

[Customers](#) > Cooler Company

Profile Contact Info Item Numbers Custom Rates Additional Charges

Duplicate **Edit**

Status

Active Customer **YES**

Customer Details

Customer No Cooler Company

Company Name Cooler Company

Type Commercial

Salesperson -

Note

Billing Details

Bill Customer **YES**

Billing Method High-watermark per Month

Calculation

Customer References -

Invoice/PO# -

Shipping Details

On the next screen, enter the new customer information. Notice the new name for the company has the “DUP-” prefix. Update any information on this Profile tab. Press **Next** to update the Contact Info tab.

The screenshot shows the 'Add New Customer' form with the 'Profile' tab selected. The form is divided into two columns. The left column contains fields for 'Status' (Active Customer with a 'Yes' button), 'Customer Details' (Customer No. and Company Name, both containing 'DUP-Cooler Company' and highlighted with red boxes), 'Type' (Commercial dropdown), 'Salesperson' (empty text field), and 'Note' (empty text area). The right column contains fields for 'Billing Details' (Bill Customer with a 'Yes' button), 'Billing Method Calculation' (radio buttons for Daily and Monthly, with Monthly selected), 'Weight per Transaction' (empty text field with a 'No' button), 'Flat Customer' (empty text field with a 'No' button), 'Customer References' (empty text field), 'Invoice/PO#' (empty text field), 'Shipping Details' (empty text area), and 'Number of business days required for outbound delivery.' (0). At the bottom, there are three buttons: 'Next >' (blue), 'Cancel' (black), and 'Save' (green). A red arrow points to the 'Next >' button.

Update any information on this Contact Info tab. Press **Save**.

Add New Customer

Profile

Contact Info

Customer Details

Address line 1 *
123 Main Street

Address line 2

City *
Grand

State
Color

Postal Code
54687

Billing Address

☐ Different billing address

☐ Send invoice by email

< Previous

Cancel

Save

REFERENCE: WD-3727

Item Setup

Length, Width and Height are fields available under **Item Number** to capture dimensions of items.

Dimension information is not only helpful to define an item so that you can identify it, but dimensions can also assist when determining costs from rates. They help as follows:

- If length, width, and height are defined and a base rate for cubic feet is selected, the dimensions are used to calculate the cubic feet per UM. $(\text{Length} \times \text{Width} \times \text{Height}) / 1728$
- If length, width, and height are defined and a base rate for square footage is selected, the dimensions are used to calculate the SF (square footage) per UM (Unit of Measure). $(\text{Length} \times \text{Width}) / 144$

Find this feature when adding a new line number.

Add new item number

Item Details

Item No *

Item Name

SKU No

Expected Quantity

Unit of Measure *

Description *

Manufacturer

Item Weight

Length ⓘ

Width ⓘ

Height ⓘ

Item Configurations

☐ Serial No
 ☐ Track PO No
 ☐ FIFO by Receiving Date
 ☐ FIFO by Expiration Date

Item Photo

Upload item photo

Rate Details

Handling in

Base Rate

Storage

Base Rate

Handling out

Base Rate

Weight per UM

Sqft per UM

Cuft per UM

Cancel

Save

This feature can also be found when editing an item number. From **Items** > Choose an **Item No.** Click the **blue pen** to edit.



2. Items

Items

Item No *

ABCD1

▼



Inventory No

Serial No

SKU No

Unit of Measure

Status

Weight

▼

Description

Stuff

Attachments

[+ Upload Item Documents](#)

Quantity

Qty Expected *

Bill Type

Bill Type Qty ⓘ

CWT

10

+ Add Item

The dimensions fields are also found on **Edit item number**, as shown below.

Item No *

ABCD1

Item Name

SKU No

Expected Quantity

Unit of Measure

Weight

Description *

Stuff

Manufacturer

Item Weight

10

Length ⓘ

Width ⓘ

Height ⓘ

Item Configurations

☐ Serial No
 ☐ Track PO No
 ☐ FIFO by Receiving Date
 ☐ FIFO by Expiration Date

Item Photo

Upload item photo

Rate Details

Base Rate

HandlingIn_CWT

Base Rate

Storage_CWT

Base Rate

HandlingOut_C...

Weight per UM

10

Sqft per UM

Cuft per UM

Cancel

Update

REFERENCE: WD-3725

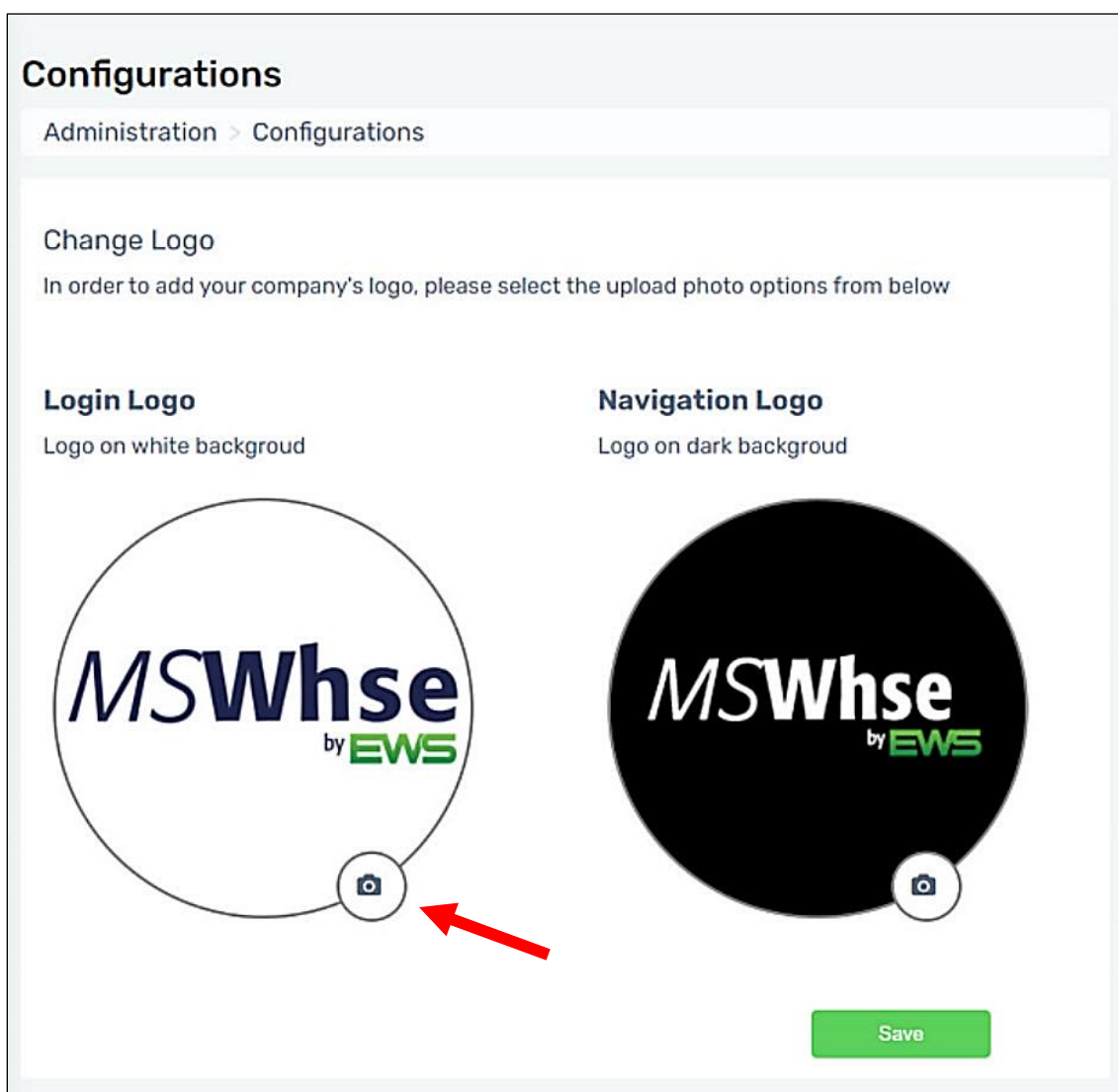
Administration

On the MSWarehouse website, you now have the option to replace the MSWhse logo with your company's logo(s).

How nice it will be to see your own company's logos displayed on the MSWarehouse website!

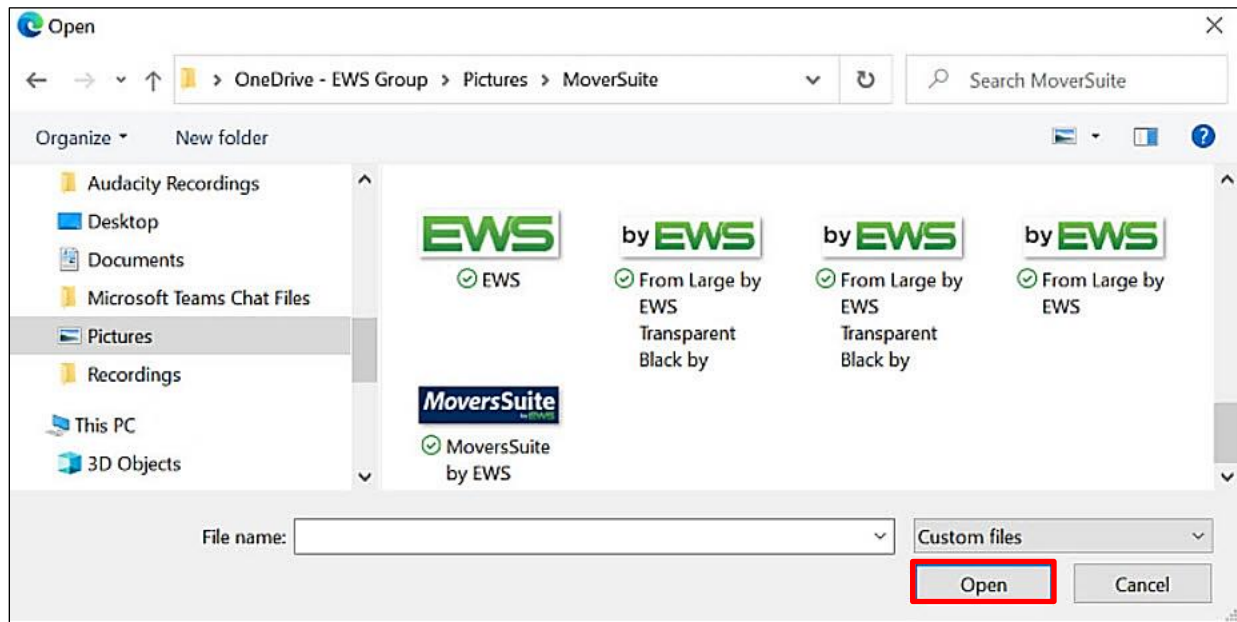
To use this feature, go to setup area: **Homepage > Administration > Configurations**. The default logos are the MSWarehouse logo.

To change the logo, click a **camera** icon.



Once the camera is clicked, your file manager will open and choose the logo you wish to use. Click **Open**. The logo chosen will now be used in that location. For our example above, the *Login Logo* will be changed.

NOTE: The white background logo is used at Login as noted. The black background logo is used on the homepage. It is recommended that you use likewise backgrounds for each location for best presentation.



The Login Logo is now updated with your change. Click **Save**. To go back to the default MSWarehouse, click **Revert**.

Configurations

Administration > Configurations

Change Logo

In order to add your company's logo, please select the upload photo options from below

Login Logo

Logo on white background



Navigation Logo

Logo on dark background



[Revert](#)



Save

REFERENCE: WD-3685

Inbound

Warehouse Receiving Report Number is now a field on Inbound transactions and under Details.

For those that use Warehouse Receiving Report Numbers, you will be pleased to know that this field is now available.

To use this field, go to setup area: **Homepage > Inbound**. The field is accessible from **Expected** and **Receiving**. The field is also editable in these locations.

1. Details

Warehouse

Warehouse

Creedmoor Moving Systems & Storage

Customer

Customer

Starburst Hotel ...

Email

peter.mark@starburst.com

PO No

Vendor

Contact Person *

Peter Mark

Phone Number

0123 456 891

References

Warehouse Receiving Report Number

1346854

Shipping

Carrier

Bill of Lading

165846351

Contact Person

Phone Number

Expected Date *

01/27/2022

Time Frame

Internal

Created By

Joe Eckert

Special Instructions

Documents

+ Upload Transaction Documents

REFERENCE: WD-3706

January 2022 Fixes

Processing

You can now save a Processing Outbound transaction when the picked item quantities are less than the requested quantities.

Previously, if you were picking a line item and there wasn't the quantity requested, you weren't able to save the order with the reduced quantity entered into **Qty to be delivered**. If the **Quantity Available** showed there was quantity available, but it really wasn't there, you couldn't **Save**. This sometimes happened if an item was lost or stolen.

Now, the transaction can be completed with whatever quantity is entered for **Quantity to be Delivered**.

In the example below, the **Quantity Requested** is **26**. *Current Locations* shows 26 in Location JOE013C; however, there are only 25 there. So, **25** was entered for **Quantity to be Delivered**. Click **Update** and now you can **Save**.

2. Items

Items

Item No

G24 - Growler

☐ Outbound all quantities for G24

PO No

Without I

Inventory No

Without Inver

Serial No

SKU No

Unit of Measure

Pallet

Description

Pallet containing 24 Cases of Growlers Clear.

Attachments

+ Upload Item Documents

Quantity

Bill Type

Pallet

Bill Type Qty

1

Qty Delivered

70

Qty Requested

26

Current Locations

Pallet	Vault	Location	Qty	Qty to be Available delivered
P900	-	AA014RR ⓘ	0	1
-	-	JOE013C ⓘ	26	25

Cancel

Update

3 Items

0 files

Item No

Growler Dark

PO No

-

Inventory

No

Serial No

-

SKU No

-

Item Name

-

Description

Growler Dark 24 Cases per pallet.

0 files

Item No

G24

PO No

-

Inventory

No

Serial No

-

SKU No

-

Item Name

Growler

Description

Pallet containing 24 Cases of Growlers Clear.

0 files

Item No

Pint Bottle Clear

PO No

-

Inventory

No

Serial No

-

SKU No

-

Item Name

-

Description

Pint Bottle Clear 36 cases per pallet

Outbound All

Cancel

Save

Efficient Workflow Solutions, LLC

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MSWarehouse Release Highlights

This section provides a list of features, enhancements, and fixes made at each version of MSWarehouse.

NOTE: Open the [Release History](#) page to view information on all MSWhse releases.

VERSION	VIDEO	HIGHLIGHT
January 2022		<p>Release Date: January 27, 2022</p> <p>Features:</p> <p>Outbound Request Place restrictions on a customer's account to determine how soon they can enter delivery dates for Requested Outbound transactions. (WD-3687)</p> <p>Report A new report called "Pick Ticket By Item" lists items required for an Outbound transaction by Item Number. (WD-3723)</p> <p>Duplicate Customer Easily duplicate Customer information with a new button on the Customer Profile tab called "Duplicate." (WD-3727)</p> <p>Item Setup Length, Width and Height are fields available under Item Number to capture dimensions of items. (WD-3725)</p> <p>Administration On the MSWarehouse website, you now have the option to replace the MSWhse logo with your company's logo(s). (WD-3685)</p> <p>Inbound Warehouse Receiving Report Number is now a field on Inbound transactions and under Details. (WD-3706)</p> <p>Enhancements: No fixes in this release.</p> <p>Fixes:</p> <p>Processing You can now save a Processing Outbound transaction when the picked item quantities are less than the requested quantities.</p>
November 2021		<p>Release Date: December 27, 2021</p> <p>Features:</p>

		<p>Default Address Check Box: Uses customer's default address and contact information in an outbound transaction (WD-3703)</p> <p>Item Weight Field: Allows entry of item weight, even when the item is not to be billed by weight (WD-3707)</p> <p>Email Notification of Transactions: Email notification can be sent to specific individuals to receive notices of transactions – inbound, outbound, or both (WD-3686)</p> <p>Enhancements:</p> <p>Administration: Allows rack locations to be edited to show as N/A (WD-3667)</p> <p>Fixes:</p> <p>No fixes in this release.</p>
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