Release Information

MSWarehouse Release Update

MSWarehouse Release Update

Version: December 2022

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Edition

December 2022

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Technical Support

If at any time you experience problems with *MSWarehouse*, we encourage you to contact us as follows:

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December 2022 Summary

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

#	Change Summary
2	New Product Features
3	Release Enhancements
1	Release Fix

MSWhse December 2022 Features

This section lists the enhancements added to MSWarehouse.

Reports

Vault History Report is a new report that tracks the history of all the transactions in and out of vaults.

Do you ever find something in a vault that shouldn't be there? Track the inventory of a vault with this new Vault History Report.

From the menu, choose Reports > Vault History Report. Select a Warehouse and a Vault Number and then click See Results. The Vault History Report lists: Transaction Date, Customer Number, Customer Name, Transaction Number, Transaction Type (Inbound, Outbound, Adjustment or Move), and details if the vault is still active.

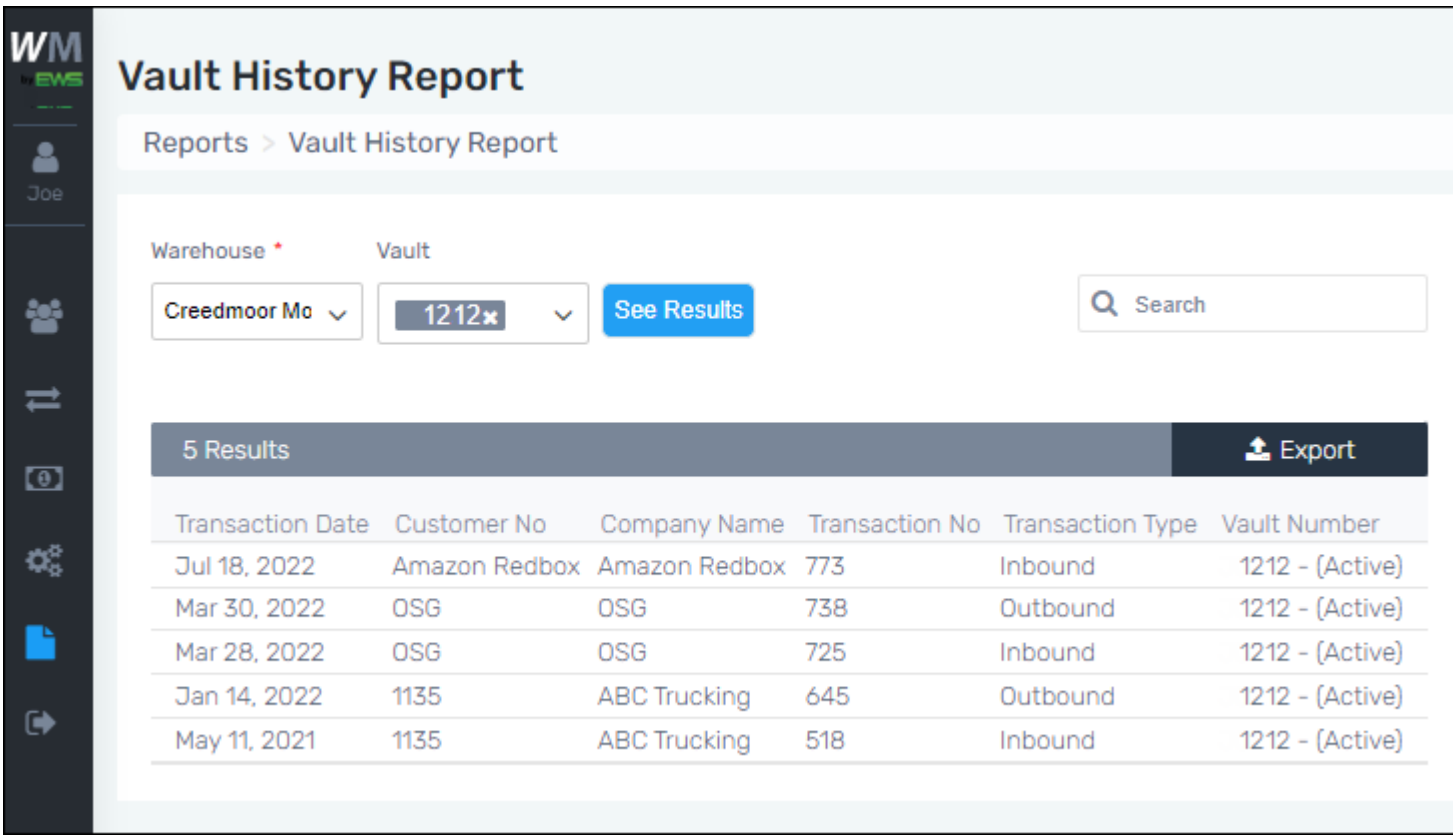


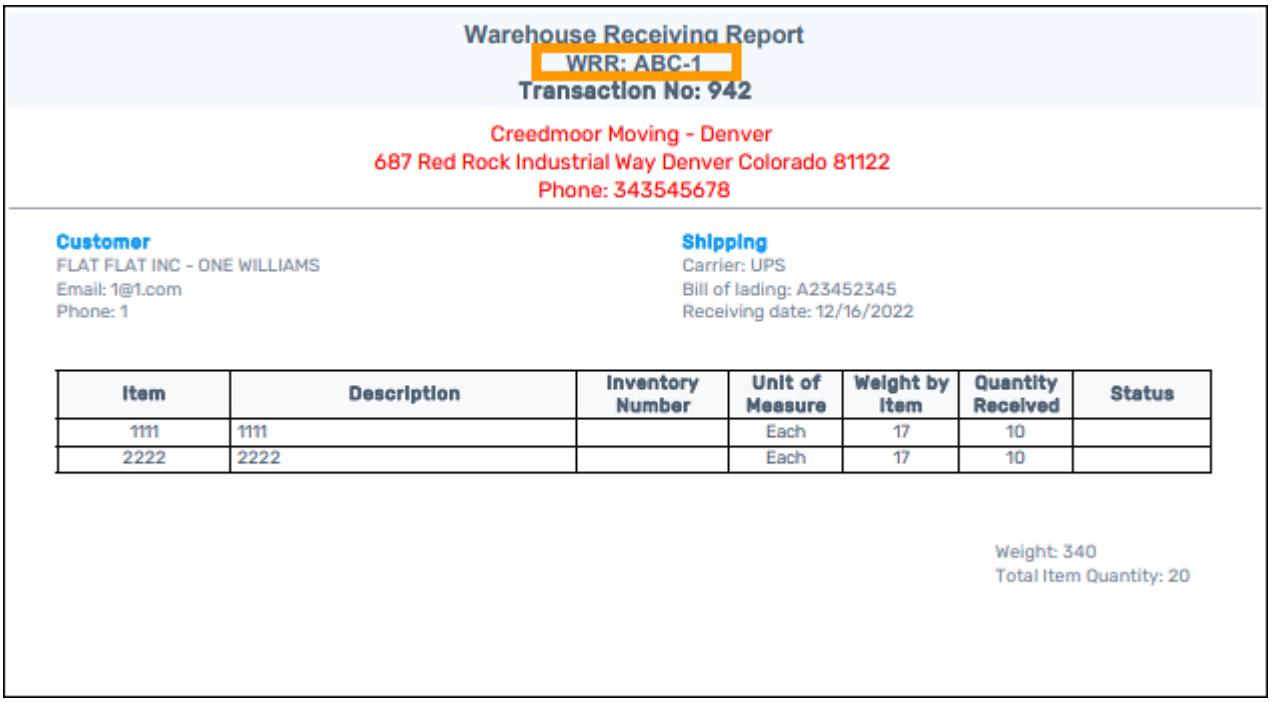
Figure 1: Vault History Report

INTERNAL REFERENCE:
WD-3822

WRR Numbers

Unique WRR Numbers can be automatically generated.

Wouldn't it be nice to be able to have automatically generated WRR Numbers on Inbound Transactions? This option is now available and can be set on a Customer's profile. Even better, the WRR Numbers can be assigned a prefix unique to that Customer or Project. The WRR Numbers will be automatically generated sequentially when an Inbound Expected transaction is moved to Inbound Receiving or when a new transaction is created under Inbound Receiving.



Item	Description	Inventory Number	Unit of Measure	Weight by Item	Quantity Received	Status
1111	1111		Each	17	10	
2222	2222		Each	17	10	

Figure 2: WRR has custom, autogenerated number

The **Auto Generate WRR Number** checkbox has been created to facilitate this option and is located on a Customer's Profile. To set up this option:

1. From a Customer's Profile tab, click Edit.
2. From the Edit Customer screen, check the WRR Number Required box found on the Profile tab (Figure 3).
3. Once the WRR Number Required box is checked, the Auto Generate WRR Number box appears, as well as the Prefix and Next in Sequence fields.
4. Check Auto Generate WRR Number. This makes the Prefix and the Next In Sequence fields mandatory.
5. Under Prefix, enter a custom prefix for that Customer's WRR Numbers. The prefix can be up to 8 characters and can also be an alpha/numeric combination. CMD has been entered in Figure 3.
6. Enter a whole number from where the count will start in the Next in Sequence. We suggest the number 1.
7. Click Save. Once the first WRR Number is automatically generated for this Customer, the field is locked down and is not changeable.

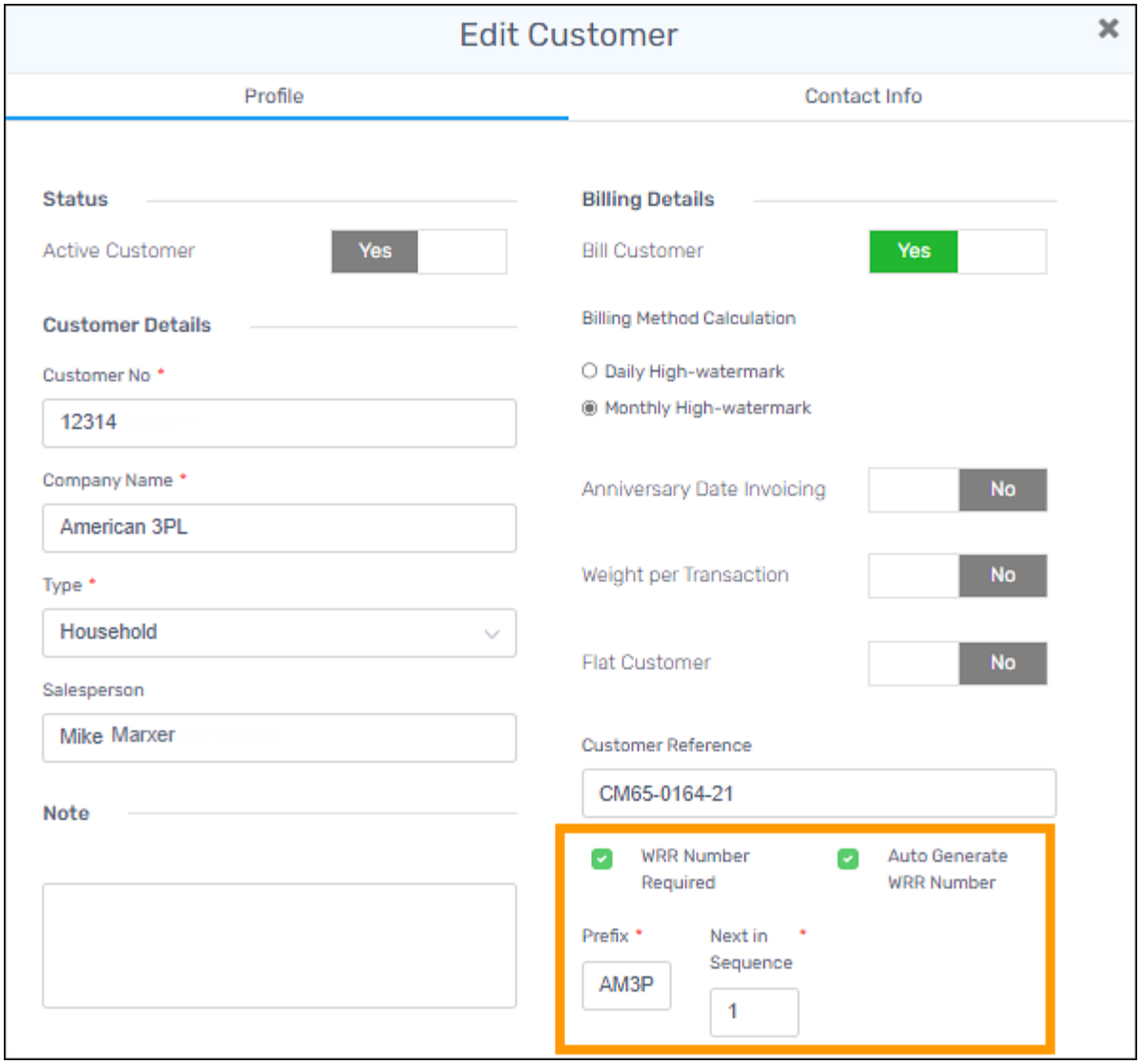


Figure 3: How to set the Customer Profile to autogenerate WRR numbers.

NOTE:

- Prefixes can be changed at any time, if needed; however, once a WRR Number has been autogenerated, the number cannot be reset or changed.
- If prefixes are duplicated for multiple customers, duplicate WRR Numbers are possible which fails to utilize the full benefits of this feature. For example, if Scott Design and OSD both have ABC set as their prefix, it is possible for both Customers to have WRR Numbers ABC-1, ABC-2, etc. It would be a better use of this feature and much more precise to have WRR Numbers SCO-1, SCO-2, etc and OSD-1, OSD-2, etc for the respective companies.

INTERNAL REFERENCE:
WD-3860

MSWhse December 2022 Enhancements

This section lists the enhancements added to MSWarehouse.

Warehouse Receiving Report (WRR)

The WRR is available in Receiving.

Several users have requested the ability to access the WRR when receiving Inbound Transactions. Some warehouse personnel prefer to receive items against this report and then confirm quantities against the Bill of Lading. Additionally, shipping information, such as weights, can be verified before transactions are finalized or Completed.

From Inbound Receiving, choose a transaction. Click the ellipses (three dots) to access this report.

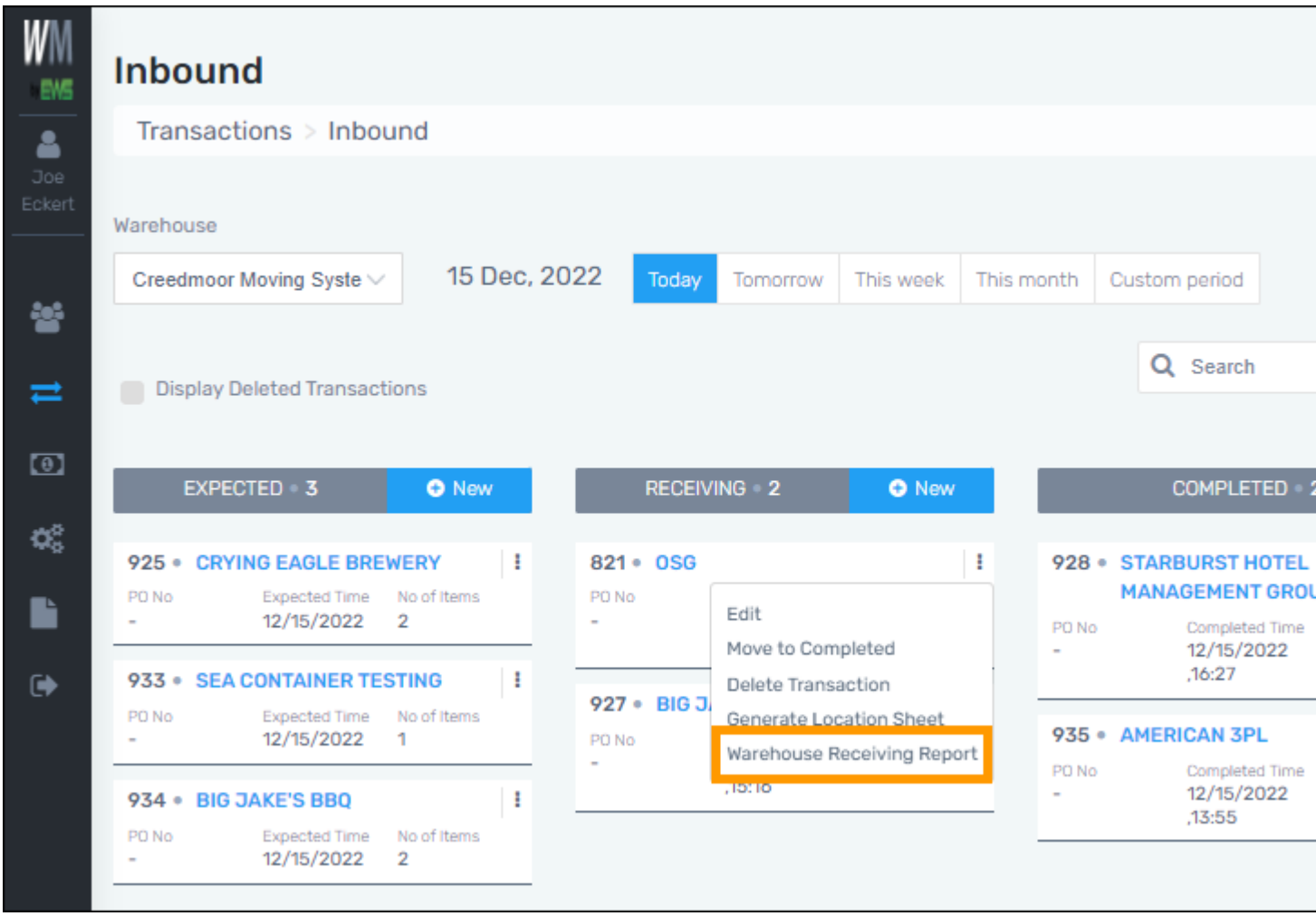


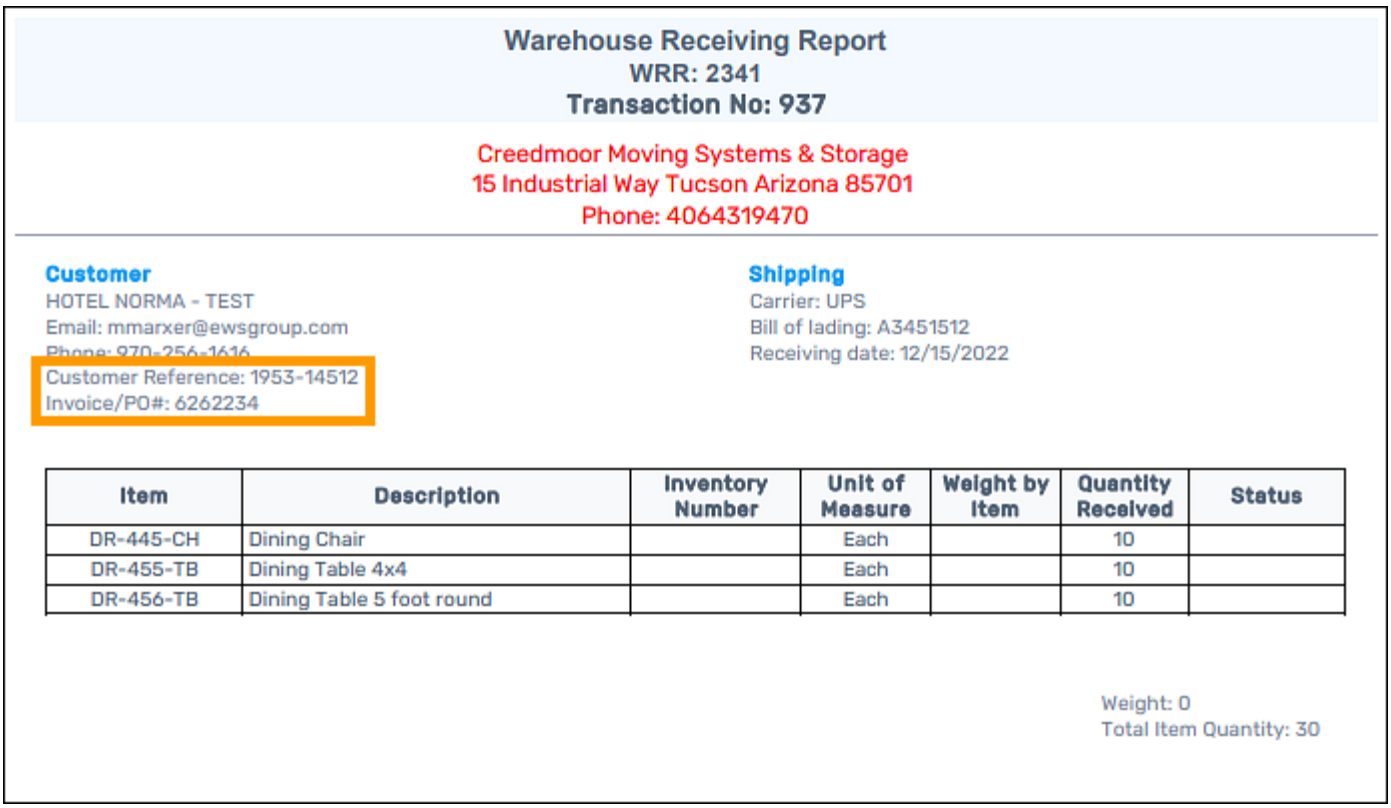
Figure 4: Warehouse Receiving Report is available under Receiving

INTERNAL REFERENCE:
WD-3854

Warehouse Receiving Report (WRR)

The WRR now includes Customer Reference and the Invoice Number/PO Number set on a Customer's Profile.

This report has even more order information, so you have the information you need where you need it.



Warehouse Receiving Report
WRR: 2341
Transaction No: 937

Creedmoor Moving Systems & Storage
15 Industrial Way Tucson Arizona 85701
Phone: 4064319470

Customer
HOTEL NORMA - TEST
Email: mmarxer@ewsgroup.com
Phone: 970-256-1616
Customer Reference: 1953-14512
Invoice/PO#: 6262234

Shipping
Carrier: UPS
Bill of lading: A3451512
Receiving date: 12/15/2022

Item	Description	Inventory Number	Unit of Measure	Weight by Item	Quantity Received	Status
DR-445-CH	Dining Chair		Each		10	
DR-455-TB	Dining Table 4x4		Each		10	
DR-456-TB	Dining Table 5 foot round		Each		10	

Weight: 0
Total Item Quantity: 30

Figure 5: Customer Reference and Invoice/PO# on the WRR

Update a Customer Profile to include information in these fields by clicking the **Edit** icon on a Customer's profile and then entering information in these fields. Click Save.

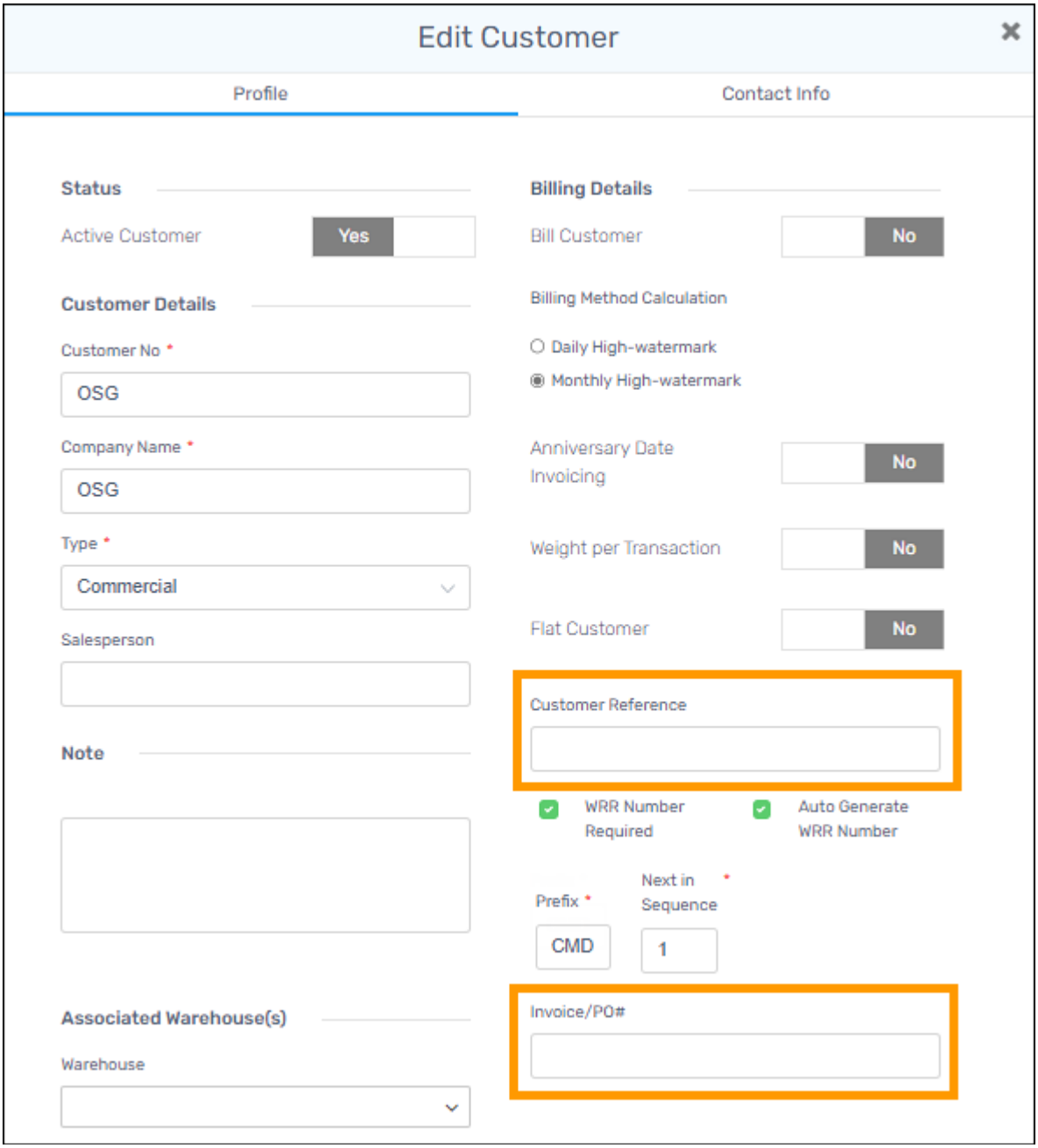


Figure 6: These fields are included in the WRR

INTERNAL REFERENCE:
WD-3858

Invoices

Invoices include the Invoice Number/PO Number set under Customer Profile.

Include an Invoice Number or Purchase Order Number on a Customer's invoices by updating their Profile on their account.

Figure 7: The top of an invoice showing the Invoice#/PO Number now included on invoices

In the example in Figure 7, the Invoice/PO Number is set to 6262234. This number was set following these simple steps:

1. From the menu select Customers and choose a Customer.
2. Click the Edit button.
3. On Edit Customer screen, set the Invoice/PO# field (Figure 8).
4. Click Save.

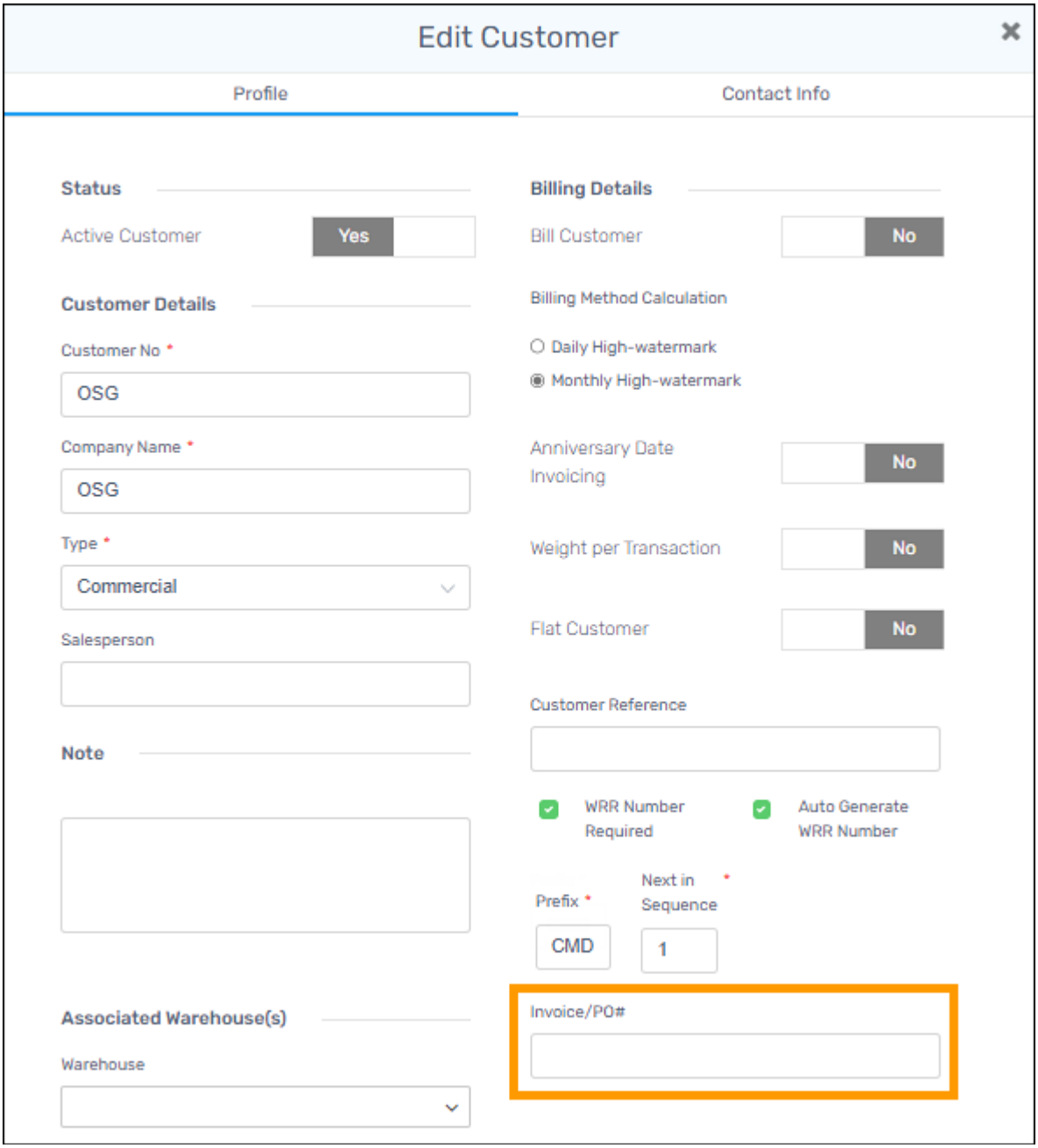


Figure 8: Invoice#/PO Number field on the Edit Customer screen

INTERNAL REFERENCE:
WD-3859

MSWhse December 2022 Fixes

Transaction Report

Transaction Reports are displaying correct quantities.

Something weird happened. If quantities of one Item Number was received on two line items (for example, one line was for a damaged item), the Transaction Report was duplicating one of the lines. This created inaccurate quantities in the Transaction Report. This has been fixed and line items display correctly.

INTERNAL REFERENCE:
WD-3851