



Release Information

MSWarehouse Release Update

Features and Changes made to MoversSuiteWarehouse

MSWarehouse Release Update

Release Date: March 31, 2022

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March 2022 Summary

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

#	Change Summary
3	New Product Features
	Release Enhancement
	Release Fix

LINKS:

[March 2022 Features](#)

[March 2022 Fixes](#)

[MSWarehouse Release Highlights](#)

[MSWarehouse Release History](#)

March 2022 Features

This section lists the features added to MSWarehouse.

Administration:

Create customized roles and permissions in MSWarehouse.

When it comes to running your organization, being able to create the exact role you need with the specific permissions needed for that role can be helpful.

To create a new role, from the Navigation Panel, choose **Administration > Accounts & Permissions**.

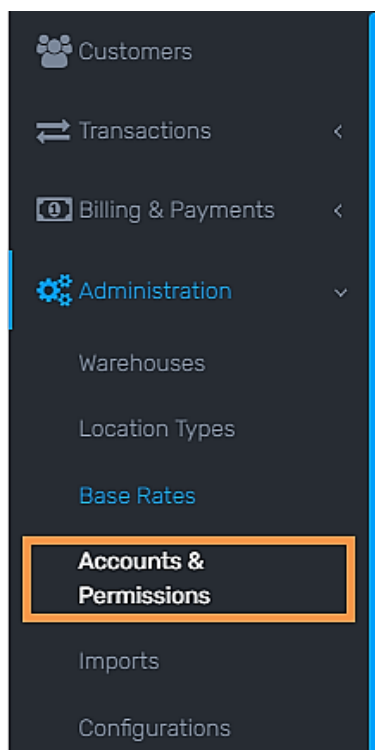


Figure 1: Navigation Panel

On the **Accounts & Permissions** page, choose the **Roles & Permissions** tab. Select whether the role will be a **Warehouse** role or a **CFW** (Customer Facing Web) role. Click **+ Add Role**.

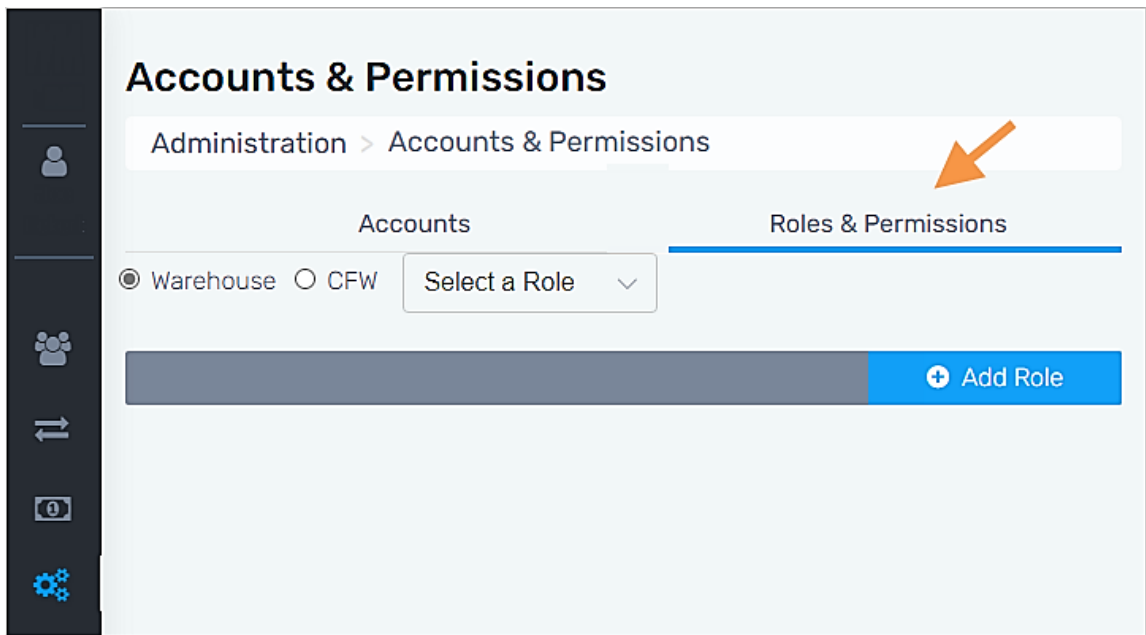


Figure 2: Roles & Permissions tab is underlined to show it is the view

On the **Add Role** screen, enter whatever **Role Name** you wish. Under **Copy Roles Permissions**, choose whichever existing role is closest to the permissions you would like for the new role. Click **Save**. Permissions are editable as detailed in the next step.

Figure 3: Enter Role Name and Permissions

After the **Role Name** is created, further refine the permissions for this role, if needed. From the **Accounts & Permissions** screen, choose whether the role is a **Warehouse** or **CFW** role. Then choose the role from the **Select a Role** drop-down.

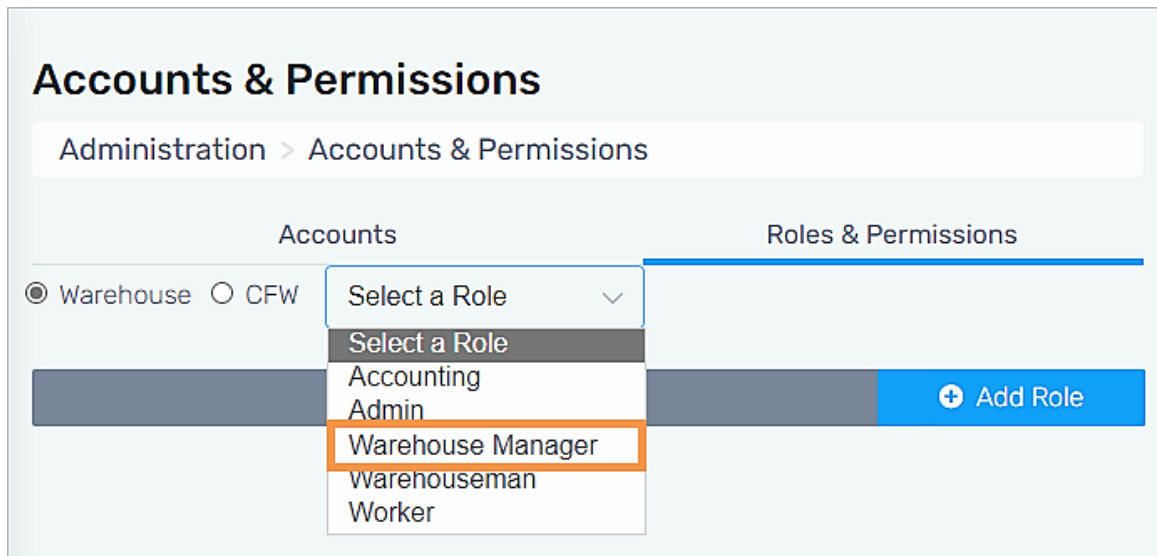


Figure 4: **Select Role** is sorted by Warehouse or CFW

Notice the role name is *Warehouse Manager*. Click the **edit** icon (the pen) to change any of the permissions for this role. Click **Save**.

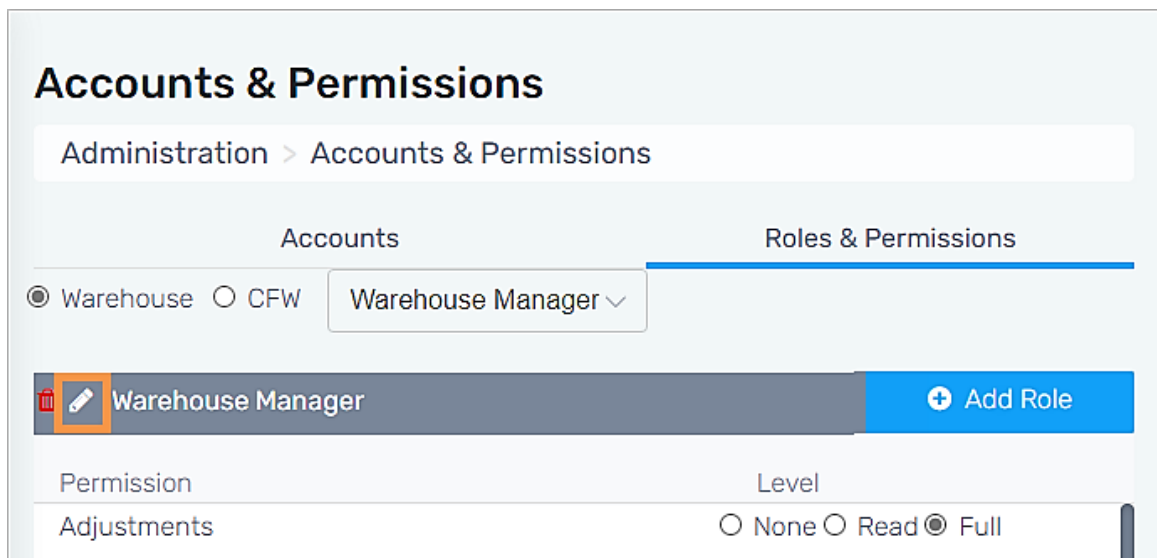


Figure 5: Edit permissions using edit icon

Permission Levels include None, Read (read-only), and Full (which allows full access.)

To edit existing roles, as above, select Warehouse or CFW. Select the role from the dropdown and click the edit icon. Make your changes. Remember to save!

Roles created and edited permissions are only active in MSWarehouse.

REFERENCE: WD-319

Outbound Transactions

“Add Items from Grid” is a new feature which offers the ability to choose multiple line items and their pick locations from this new view format in Outbound Transactions.

“The grid” is a new view available whenever the new **Add Items from Grid** button is clicked. The grid contains a list of all inventory for the customer. The functionality of “the grid” is dependent on whether it is clicked in Requested Outbound or Processing Outbound.

When entering multiple line items on an Outbound Transaction, instead of clicking on **Item No** to search, find, enter quantity, and then enter pick locations for each line item individually, click this new **Add Items from Grid** option to make the process quicker and simpler.

2. Items

Items

Item No *

PO No Inventory No Serial No

SKU No Unit of Measure

Description

Attachments

+ Upload Item Documents

Quantity

Bill Type Bill Type Qty

Quantity Available Qty Requested *

Add Items from Grid + Add Item

Outbound All Cancel Save

Figure 6: Add Items from Grid location

Whether it is an employee or a CFW (Customer Facing Web) customer entering a **Requested Outbound** transaction, this new **Add Items from Grid** feature will simplify the process.

For the new requested outbound transaction, click **+New** under **Requested**.

The screenshot shows the 'Outbound' section of a software interface. At the top, there's a breadcrumb 'Transactions > Outbound'. Below that is a 'Warehouse' dropdown menu set to 'All'. A date filter shows '28 Mar, 2022' with buttons for 'Today', 'Tomorrow', 'This week', 'This month', and 'Custom period'. There's a checkbox for 'Display Deleted Transactions' and a search bar. At the bottom, there are three status tabs: 'REQUESTED • 0', 'PROCESSING • 0', and 'COMPLETED • 1'. Each tab has a '+ New' button. An orange arrow points to the '+ New' button under the 'REQUESTED' tab.

Figure 7: Entering a New Requested Outbound transaction

After entering the required information under **Details** for the transaction, click **Add Items from Grid** under **Items** (see Fig. 6).

The **Add Items from Grid** screen appears. This is “the grid.” Check all the item numbers required. Each time a line item is checked, the *Quantity Request* dropdown appears. Enter the **Quantity Requested**. When all line items are entered, click **Select Items**.

Note: This is the version of the grid that is available from *Requested Outbound* transactions.

Add Items from Grid

Search

7 Items

	Item No	Item Description	SKU	Qty	UM	Inventory No	Serial No
<input type="checkbox"/>	Bottle Tops	Caps		1	Each		
<input type="checkbox"/>	G24	Pallet containing 24 Cases of Growlers Clear.		96	Pallet		
<input type="checkbox"/>	GRKEG	Growler Metal Keg Style		96	Each		
<input type="checkbox"/>	Growler Dark	Growler Dark 24 Cases per pallet.		232	Pallet		
<input type="checkbox"/>	Pint Bottle Clear	Pint Bottle Clear 36 cases per pallet		39	Pallet	123456	
<input checked="" type="checkbox"/>	Pint Bottle Clear	Pint Bottle Clear 36 cases per pallet		96	Pallet		
<input checked="" type="checkbox"/>	Pint Bottle Dark	Pint Bottle Dark 36 Cases per pallet		71	Pallet		

Location

Available

Quantity Request

15

Cancel

Select Items

Figure 8: Add Items from Grid view in Requested Outbound

The items and the quantities requested are now listed on the order. Click **Save**.

2. Items

Items

Item No *

PO No

Inventory No

Serial No

SKU No

Unit of Measure

Description

Attachments

+ Upload Item Documents

Quantity

Bill Type

Bill Type Qty

Quantity Available

Qty Requested *

Add Items from Grid

+ Add Item

Outbound All

Cancel

Save

2 Items

Item No

PO No

Inventory

Serial No

SKU No

Pint Bottle Clear

-

No

-

-

0 files

Item Name

Description

-

Pint Bottle Clear 36 cases per pallet

Item No

PO No

Inventory

Serial No

SKU No

Pint Bottle Dark

-

No

-

-

0 files

Item Name

Description

-

Pint Bottle Dark 36 Cases per pallet

Figure 9: Items are now listed in Items

When the order is eventually moved to **Processing**, warehouse can click **Add Items from Grid** to access the grid. The screen will look like Fig. 9.

Since we now are in **Processing**, the **Add Items from Grid** has additional functionality. Each line item will have locations and availabilities in those locations listed for each line item.

The required items are checked; however, all inventory for that customer is listed in case you need to add additional items. For each required item, notice the **Quantity Request** and enter the quantities to be picked from the locations that you choose. When finished, click **Select Items**. Back on the Item detail (Fig. 9), click **Save**.

✕
Add Items from Grid

7 Items

Item No	Item Description	SKU	Qty	UM	Inventory No	Serial No
<input type="checkbox"/>	Bottle Tops	Caps	1	Each		
<input type="checkbox"/>	G24	Pallet containing 24 Cases of Growlers Clear.	96	Pallet		
<input type="checkbox"/>	GRKEG	Growler Metal Keg Style	96	Each		
<input type="checkbox"/>	Growler Dark	Growler Dark 24 Cases per pallet.	232	Pallet		
<input type="checkbox"/>	Pint Bottle Clear	Pint Bottle Clear 36 cases per pallet	39	Pallet	123456	
<input checked="" type="checkbox"/>	Pint Bottle Clear	Pint Bottle Clear 36 cases per pallet	96	Pallet		

Location	Available	Quantity Request	
AA013C	1	<input type="text" value="1"/>	<input type="text" value="15"/>
JOE013C	95	<input type="text" value="14"/>	

<input checked="" type="checkbox"/>	Pint Bottle Dark	Pint Bottle Dark 36 Cases per pallet	71	Pallet		
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Cancel
Select Items

Figure 10: **Add Items from Grid** view in Processing Outbound

As the order is still in **Processing** and listed under **Processing** under **Outbound Transactions**, click the **ellipses** (three dots) to **Generate Pick Ticket By Item** to assist in pulling the items.

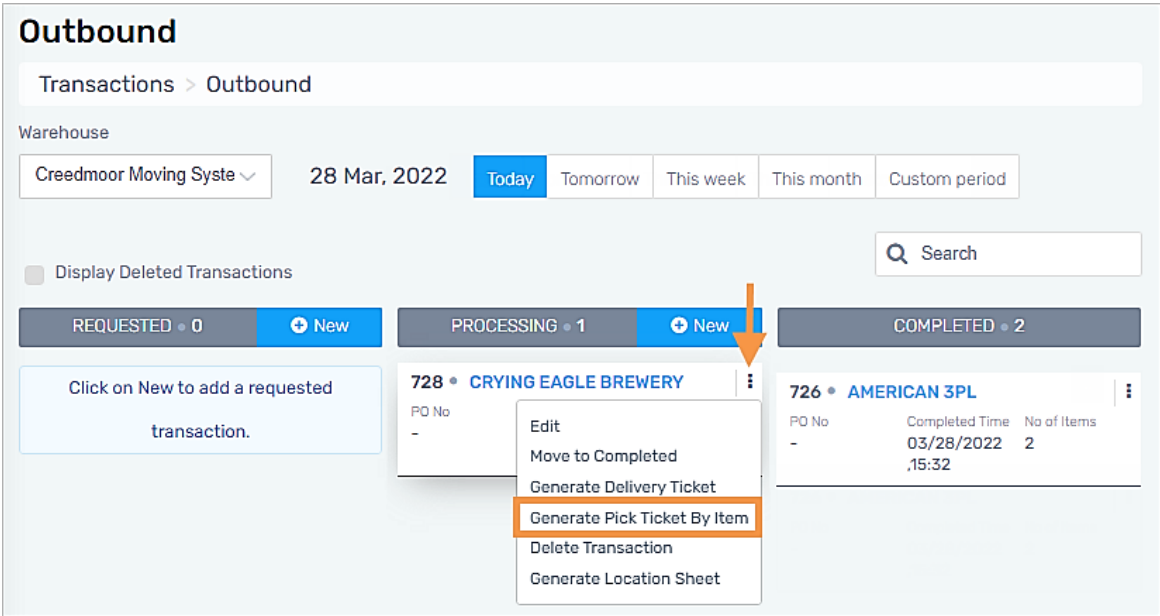


Figure 11: Remember to **Generate Pick Ticket By Item**

The **Add Items from Grid** functionality is also available for **New Processing Outbound Transactions**.

Click **+New** under **Processing**.

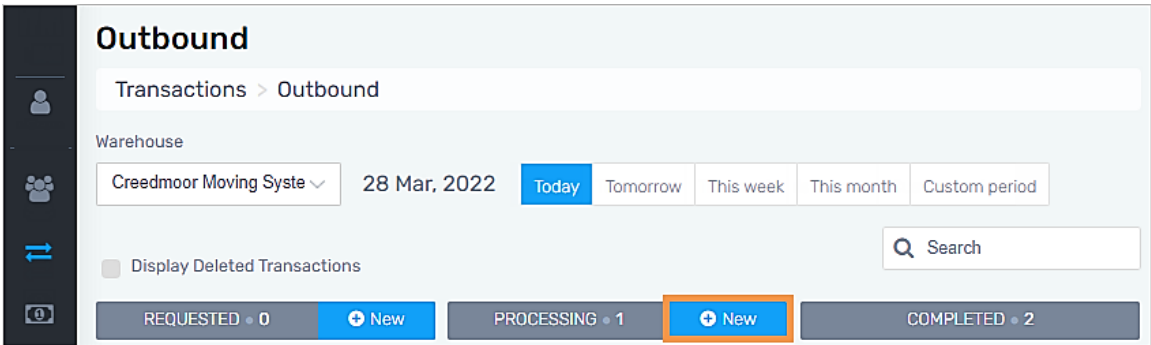


Figure 12: **Add Items from Grid** is available for New Processing Outbound transactions

After entering the required information under **Details** (customer, carrier, etc.), click **Add Items from Grid**. As we are working under **Processing**, the **Add Items from Grid** screen will include the ability to: enter the quantity requested; see the locations and availability in each locations; enter quantities for each location as needed; and click **Select Items**.

In the example below, there are two item numbers checked. The dropdown is for the **Item No Growler Dark**. For that item, enter the **Quantity Request** and, in the example, ten are needed. Easily see where all the items are located and enter the pick quantities from your choice of pick locations. Click **Select Items** to add both line items them to the outbound transaction.

The screenshot shows the 'Add Items from Grid' window. At the top is a search bar. Below it, a header indicates '7 Items'. The main table lists items with checkboxes, item numbers, descriptions, SKUs, quantities, and units. Two items are checked: 'G24' and 'Growler Dark'. Below the table, a detailed view for 'Growler Dark' shows a table of locations with available quantities and quantity request input fields. The 'Quantity Request' for 'Growler Dark' is set to 10. At the bottom are 'Cancel' and 'Select Items' buttons.

Item No	Item Description	SKU	Qty	UM	Inventory No	Serial No
<input type="checkbox"/>	Bottle Tops	Caps	1	Each		
<input checked="" type="checkbox"/>	G24	Pallet containing 24 Cases of Growlers Clear.	96	Pallet		
<input type="checkbox"/>	GRKEG	Growler Metal Keg Style	96	Each		
<input checked="" type="checkbox"/>	Growler Dark	Growler Dark 24 Cases per pallet.	232	Pallet		

Location	Available	Quantity Request
AA012R	8	8
JOE013CC	183	0
FDock	41	2

<input type="checkbox"/>	Pint Bottle Clear	Pint Bottle Clear 36 cases per pallet	39	Pallet	123456
<input type="checkbox"/>	Pint Bottle Clear	Pint Bottle Clear 36 cases per pallet	81	Pallet	

Figure 13: **Add Items from Grid** view includes locations under Processing Outbound transactions

Continue by clicking **Save** on the **Item** detail.

Remember to **Generate Pick Ticket by Item** to continue making your outbound transaction efficient and organized.

REFERENCE: WD-3742

Additional Charges

Now you can delete unbilled Additional Charges.

From **Transactions > Additional Charges**, choose **Warehouse**, **Customer**, and the appropriate **Month**. The list for the additional charges for the entered parameters display. To delete a charge, simply click the **delete** icon.

Additional Charges

Transactions > Additional Charges

Warehouse: Creedmoor Moving System Customer: OSG Type of Charge: Hourly

Mar 2022 **Current Month** First Unbilled Select Month

1 Charges **+ Add Charge**

Additional Charge Item	Charge	Units	Total	User	Date	Actions
Hourly	\$ 25	3	\$ 75	Joe Eckert	03/09/2022	

☐ Display Deleted Transactions

Figure 14: Additional Charges page

The Delete Transaction Additional Charge screen will appear. Enter the reason for the deletion and click **Yes, delete it**. The line is now deleted.

Delete Transaction Additional Charge ✕

Are you sure you want to delete the transaction additional charge? *

Please input the reason to delete it.

No, go back **Yes, delete it**

Figure 15: Enter reason for deleting the charge

Back on the Additional Charges page, if **Display Deleted Transactions** is checked, the deleted transaction will show with the **(deleted)** indication. If not checked, the deleted additional charge will not be listed.

Additional Charges

Transactions > Additional Charges

Warehouse: Creedmoor Moving System ▾ Customer: OSG ▾ Type of Charge: Hourly ▾

Mar 2022 Current Month First Unbilled Select Month

2 Charges + Add Charge

Additional Charge Item	Charge	Units	Total	User	Date	Actions
Hourly (deleted)	\$ 25	3	\$ 75	Joe Eckert	03/09/2022	

☒ Display Deleted Transactions

Figure 16: Deleted charge only lists if **Display Deleted Transactions** is checked

REFERENCE: WD-3743

March 2022 Enhancements

This section lists the enhancements added to MSWarehouse.

NO ENHANCEMENTS IN THIS RELEASE.

March 2022 Fixes

This section lists the fixes added to MSWarehouse.

NO FIXES IN THIS RELEASE.

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
March 2022		<p>Release Date: March 31, 2022</p> <p>Features:</p> <ul style="list-style-type: none"> Administration: Ability to create custom roles and permissions (WD-319) Outbound: New feature called “Add Grid Style” is added (WD-3742) Additional Charges: Ability to delete unbilled Additional Charges (WD-3743) <p>Enhancements:</p> <ul style="list-style-type: none"> No enhancements in this release <p>Fixes:</p> <ul style="list-style-type: none"> No fixes in this release
January 2022		<p>Release Date: January 27, 2022</p> <p>Features:</p> <ul style="list-style-type: none"> Outbound Request: Place restrictions on a customer’s account to determine how soon they can enter delivery dates for Requested Outbound transactions. (WD-3687) Report: A new report called “Pick Ticket By Item” lists items required for an Outbound transaction by Item Number. (WD-3723) Duplicate Customer: Easily duplicate Customer information with a new button on the Customer Profile tab called “Duplicate.” (WD-3727) Item Setup: Length, Width and Height are fields available under Item Number to capture dimensions of items. (WD-3725) Administration: On the MSWarehouse website, you now have the option to replace the MSWhse logo with your company’s logo(s). (WD-3685) Inbound: Warehouse Receiving Report Number is now a field on Inbound transactions and under Details. (WD-3706) <p>Enhancements:</p> <ul style="list-style-type: none"> No enhancements in this release. <p>Fixes:</p> <ul style="list-style-type: none"> Processing: You can now save a Processing Outbound transaction when the picked item quantities are less than the requested quantities.
November 2021		<p>Release Date: December 27, 2021</p> <p>Features:</p> <ul style="list-style-type: none"> Default Address Check Box: Uses customer’s default address and contact information in an outbound transaction (WD-3703) Item Weight Field: Allows entry of item weight, even when the item is not to be billed by weight (WD-3707)

		<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>No fixes in this release.</p> <p>Administration:</p> <p>Location: 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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