



Release Information

MSWarehouse Release Update

Features and Changes made to MoversSuiteWarehouse

MSWarehouse Release Update

Release Date: May 31, 2022

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Edition

May 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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May 2022 Summary

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

| # | Change Summary |
|---|----------------------|
| | New Product Features |
| 4 | Release Enhancements |
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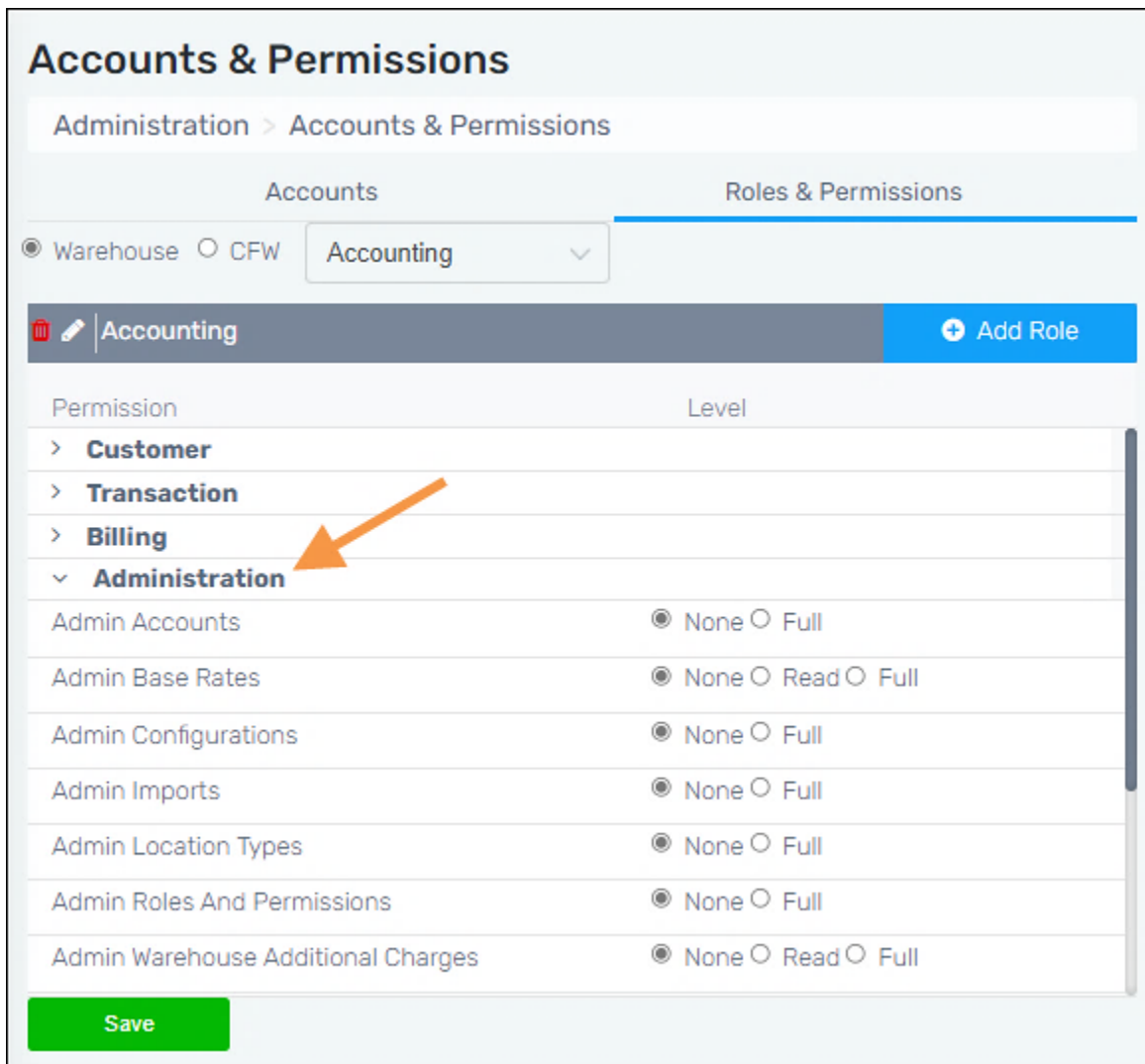
May 2022 Enhancements

This section lists the enhancements added to MSWarehouse.

Roles & Permissions

Billing now has twelve additional permissions options.

More permissions allow you to customize roles to fit your needs more exactly. Under **Administration > Accounts & Permissions > Roles and Permissions** tab, find the new permissions listed under the **Administration** dropdown (Figure 1).



Accounts & Permissions

Administration > Accounts & Permissions

Accounts Roles & Permissions

☒ Warehouse ☐ CFW Accounting

Accounting + Add Role

| Permission | Level |
|------------------------------------|---|
| > Customer | |
| > Transaction | |
| > Billing | |
| ▼ Administration | |
| Admin Accounts | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Admin Base Rates | <input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Full |
| Admin Configurations | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Admin Imports | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Admin Location Types | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Admin Roles And Permissions | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Admin Warehouse Additional Charges | <input checked="" type="radio"/> None <input type="radio"/> Read <input type="radio"/> Full |

Save

Figure 1: Arrow indicates Administration category which is where new permissions are located

Below, each new permission is detailed with the options available for that role and, where needed, more definition of what the permission level influences.

| Permissions | Levels Available |
|--------------------------------------|--|
| Admin Accounts | None - no access to Accounts Read Only - read only Full - full access to Accounts |
| Admin Base Rates | None - no access Read Only – role can see the rates Full - full access |
| Admin Configurations | None - no access Read Only - read only Full - full access |
| Admin Imports | None - no access Read Only - read only Full - full access |
| Admin Location Types | None - Location Types is not available Read Only - read only Full - role can Add, Edit and Delete (per existing rules) |
| Admin Roles & Permissions | None - no access Read Only - read only Full - full access |
| Admin Warehouse Additional Charges | None - Additional Charges tab is not available in Admin Warehouses Read Only - role can see the additional charges setup Full - role can see, add, and edit additional charges |
| Admin Warehouse Default Rates | None - Default Rates tab is not available in Admin Warehouses Read Only - role can see the rates Full - role can see rates, add rates, edit rates (per current rules) |
| Admin Warehouses General Information | None - Warehouses will not be available regardless of other Warehouse permissions Read Only - Warehouses is available and role can see the general information and addresses Full - Warehouses is available and role can add an invoice, edit general information and addresses |
| Admin Warehouse Locations | None - Locations tab is not available while in Admin Warehouses Read Only - role can see locations and can export locations - but cannot add or delete locations Full - role has full access to this tab |
| Admin Warehouse Pallets | None - Pallets tab is not available while in Admin Warehouses Read Only - role can see pallets and can export pallets - but cannot add pallets Full - role has full access to this tab |

| | |
|------------------------|---|
| Admin Warehouse Vaults | None - Vaults tab is not available while in Admin Warehouses Read Only - role can see vaults and can export vaults - but cannot add or delete vaults Full - role has full access to this tab |
|------------------------|---|

INTERNAL REFERENCE:

WD-3756

Roles & Permissions

Billing has three additional permissions options.

Billing Finalize Invoices, *Billing Generate Invoices*, and *Billing View Invoices* are the new permissions available under Billing.

Located in **Administration > Accounts & Permissions** and available under both **Warehouse** or **CFW**, choose a role. The new permissions are found under **Billing**. These three new permissions are available for every role. Click *None* or *Full* to further customize the permission for that role and be sure to click **Save**.

The screenshot shows the 'Accounts & Permissions' interface. The breadcrumb trail is 'Administration > Accounts & Permissions'. There are two tabs: 'Accounts' and 'Roles & Permissions'. Under 'Accounts', there are radio buttons for 'Warehouse' (selected) and 'CFW', and a dropdown menu set to 'Accounting'. Below this is a header bar for 'Accounting' with a trash icon, an edit icon, and an 'Add Role' button. The main table lists permissions under the heading 'Permission' and 'Level'. The 'Billing' category is expanded, showing three new permissions highlighted with orange boxes: 'Billing Finalize Invoices' (radio buttons for None and Full), 'Billing Generate Invoices' (radio buttons for None and Full), and 'Billing View Invoices' (radio buttons for None and Full). Other permissions include 'Billing Invoice History' (radio buttons for None, Read, and Full), 'Administration', and 'Other'. A green 'Save' button is at the bottom left.

| Permission | Level |
|---------------------------|---|
| > Customer | |
| > Transaction | |
| > Billing | |
| Billing Finalize Invoices | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Billing Generate Invoices | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Billing Invoice History | <input type="radio"/> None <input checked="" type="radio"/> Read <input type="radio"/> Full |
| Billing View Invoices | <input checked="" type="radio"/> None <input type="radio"/> Full |
| > Administration | |
| > Other | |

Figure 2: Billing category where new permissions are located

INTERNAL REFERENCE:

WD-3755

Rates

Rates that are expired or deleted will now be hidden from the rate setup listings Warehouse Rates and Customer Rates.

With this release, by default only current rates will be listed under **Warehouse Rates** and **Customer Rates**, as they are the rates that are in currently in use. This simplifies selection. Should there be a need to see deleted or expired rates, a new *Display Expired Rates* option when checked will list the expired rates, as well.

To see this new feature in Warehouse, go to **Administration > Warehouses > choose a Warehouse**. From the **Default Rates** tab (noticed it is underlined in blue), check the *Display Expired Rates* flag to have all rates listed. Rates that are not current will be noted by two features: the **Effective Date Frame** will be in the past and the **Actions** column is not editable.

The screenshot shows the 'Warehouses' interface with the 'Default Rates' tab selected. A checkbox labeled 'Display Expired Rates' is checked and highlighted with an orange box. Below it, a table lists 14 rates. The 'Effective Date Frame' column for several rates is highlighted with an orange box, showing dates that have expired (e.g., 'Jan 2017 - Feb 2019', 'Jan 2018 - Mar 2019', 'Jan 2017 - Jan 2020', 'Jan 2017 - May 2018', 'Jan 2018 - Jan 2019', 'Jan 2017 - Mar 2020', 'Jan 2017 -'). The 'Actions' column for these expired rates shows a disabled edit icon (a grey pencil).

| Base Rate | Item Type | Min Amount | Rate Type | Rate By | Charge | Effective Date Frame | Actions |
|----------------------|--------------|------------|-----------|-------------|----------|----------------------|---------|
| Storage_CWT | Storage | \$ 10 | CWT | Month | \$ 3.5 | Jan 2017 - Feb 2019 | |
| Storage_SFT | Storage | \$ 500 | SFT | Month | \$ 2.5 | Mar 2018 - Feb 2019 | |
| HandlingIn_CWT | Handling in | \$ 25 | CWT | Transaction | \$ 3.5 | Jan 2018 - Mar 2019 | |
| HandlingOut_Location | Handling out | \$ - | Location | Transaction | \$ 45.8 | Jan 2017 - Jan 2020 | |
| HandlingOut_SFT | Handling out | \$ 25.5 | SFT | Transaction | \$ 50.75 | Jan 2018 - | |
| Storage_CWT | Storage | \$ 25 | CWT | Day | \$ 2.5 | Jan 2017 - May 2018 | |
| HandlingIn_Pallet | Handling in | \$ 15 | Pallet | Transaction | \$ 15 | Jan 2018 - Jan 2019 | |
| Storage_Pallet | Storage | \$ 12.5 | Pallet | Month | \$ 12.5 | Jan 2018 - Jan 2019 | |
| Storage_Roll | Storage | \$ - | Roll | Month | \$ 35 | Jan 2017 - Mar 2020 | |
| HandlingIn_Roll | Handling in | \$ 25 | Roll | Transaction | \$ 25 | Jan 2017 - | |
| HandlingOut_Roll | Handling out | \$ 30 | Roll | Transaction | \$ 30 | Jan 2017 - | |

Figure 3: Display Expired Rates is checked so expired rates are shown in listing

For Customer rates, go to **Customers** > choose **Customer** > **Custom Rates** tab, notice the *Display Expired Rates* flag has not been checked. The rates are current, display an open **Effective Date Frame**, and the Actions columns shows the rates are editable, as noted by the edit icon (the pen) being blue.

Customers

Customers > American 3PL

Profile Contact Info Item Numbers **Custom Rates** Additional Charges

5 Rates [Add Rate](#)

☐ Display Expired Rates

| Base Rate | Item Type | Min | Rate Type | Rate By | Charge | Effective Date Frame | Actions |
|-------------------|--------------|-------|-----------|-------------|---------|----------------------|----------------------|
| Storage_Pallet | Storage | \$ 1 | Pallet | Month | \$ 23.5 | Dec 2018 - | Edit |
| HandlingIn_Pallet | Handling in | \$ 50 | Pallet | Transaction | \$ 12.6 | Apr 2019 - | Edit |
| HandlingOut_CWT | Handling out | \$ 66 | CWT | Transaction | \$ 3 | Apr 2019 - | Edit |
| HandlingIn_CWT | Handling in | \$ 35 | CWT | Transaction | \$ 3.6 | May 2019 - | Edit |
| Storage_Each | Storage | \$ 50 | Each | Month | \$ 10 | Jun 2021 - | Edit |

Figure 4: Display Expired Rates is not checked so expired rates are not shown in listing

INTERNAL REFERENCE:

WD-3744

Warehouses

Choose whether to view All, only Active, or only Inactive warehouses in Administration > Warehouses.

The new selector allows the ability to choose whether the listing includes All warehouses (active and inactive warehouses), Active warehouses, or Inactive warehouses under Administration. In Figure 5 below, the Active button is selected so active warehouses are in the listing.

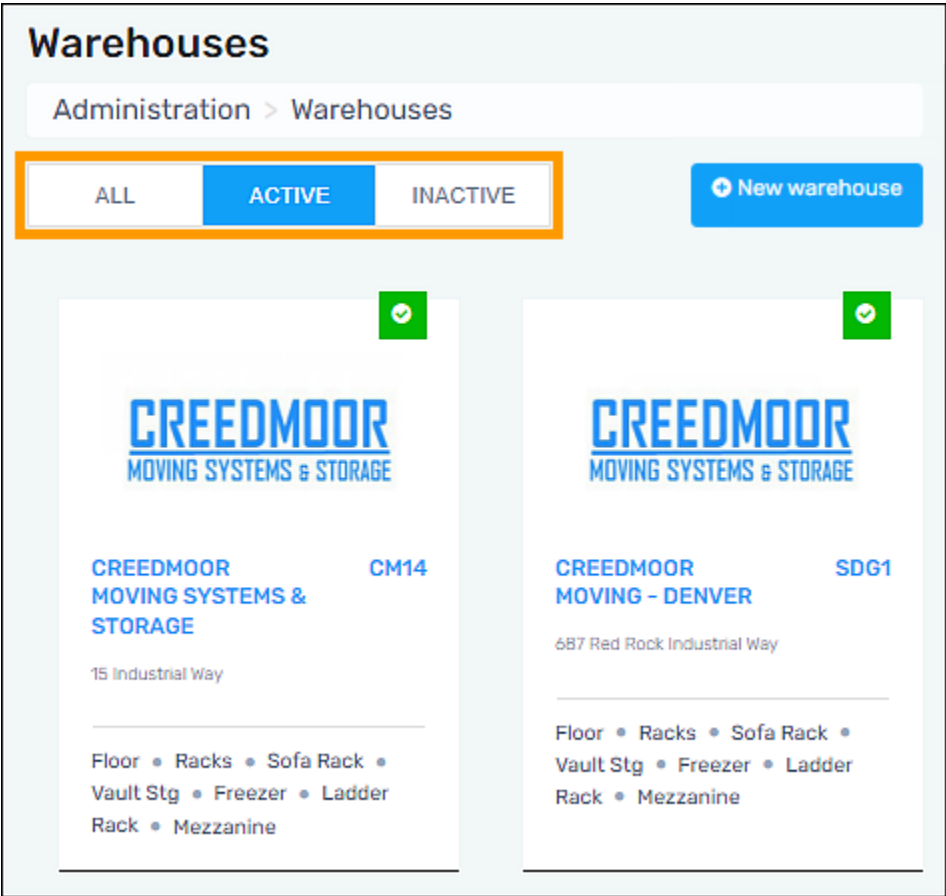


Figure 5: Active is clicked so all active warehouses are listed

INTERNAL REFERENCE:
WD-228

May 2022 Fixes

This section lists the fixes added to MSWarehouse.

Transactions

The ellipses for Completed orders are now actionable.

Completed orders under Inbound and Outbound Transactions have ellipses that now work!

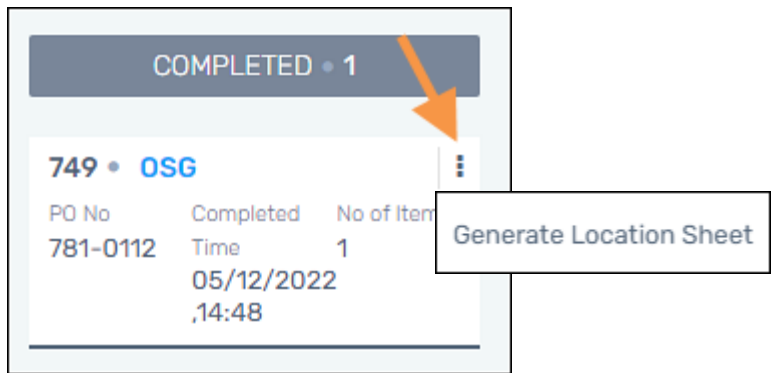


Figure 6: Ellipses is indicated

INTERNAL REFERENCE:
WD-3765

MSWarehouse Release Highlights

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

| VERSION | VIDEO | HIGHLIGHT |
|------------------------------|-------|---|
| May 2022 | | <p>Release Date: May 31, 2022</p> <p>Features:</p> <p>No features in this release</p> <p>Enhancements:</p> <p>Roles & Permissions: Twelve new permissions are created for the Administration category of permissions (WD-3756)</p> <p>Roles & Permissions: Three new permissions are created for the Billing category of permissions (WD-3755)</p> <p>Rates: Only current rates list by default. Display Expired Rates is created to allow expired rates to be viewed. (WD-3744)</p> <p>Administration: Filter warehouse cards by status in Administration > Warehouses (WD-228)</p> <p>Fixes:</p> <p>Permissions: Action dots are not displaying on completed transactions (WD-3765)</p> |
| April 2022 | | <p>Release Date: April 28, 2022</p> <p>Features:</p> <p>No features in this release</p> <p>Enhancements:</p> <p>Reports: Added Total Weight by Item Number (WD-3753)</p> <p>Customers: Documents can be attached to customer profile (WD-3742)</p> <p>Fixes:</p> <p>Move Location: Locations with pallets will successfully move to new location. (WD-3758)</p> <p>Administration: Three new permissions levels were added. (WD-3757)</p> |
| March 2022 | | <p>Release Date: March 31, 2022</p> <p>Features:</p> <p>Administration: Ability to create custom roles and permissions (WD-319)</p> <p>Outbound: New feature called “Add Grid Style” is added (WD-3742)</p> <p>Additional Charges: Ability to delete unbilled Additional Charges (WD-3743)</p> <p>Enhancements:</p> <p>No enhancements in this release</p> <p>Fixes:</p> <p>No fixes in this release</p> |
| 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:</p> <p>No enhancements 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>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> |