September 2022 Summary

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

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

MSWhse September 2022 Features

This section lists the features added to MSWarehouse.

Billing

Easily add up to three custom, recurring invoice line items on a customer-by-customer basis.

An exciting new feature offers the ability to add up to three invoice lines for recurring fees per customer. Each invoice line is customizable, so each invoice line description and charge can be whatever you need it to be. If used, the lines will be the last items on the invoice. Another use for these lines is to use them to add a note to the invoice.

The setup area includes three customizable fields per invoice line: Code, Description, and Amount. The Code is not listed on the invoice; however, the Code is linked to mapping codes in MoversSuite. As this Code is used strictly for the invoice export to be imported into MoversSuite, the caveat on the code is that it should be setup in MoversSuite to import as an item code for revenue (see **Item Code Generation** in the MoversSuite Online Help for more information). Lines added will list as the last lines on the invoice. If no lines are added, nothing will show on the invoice.

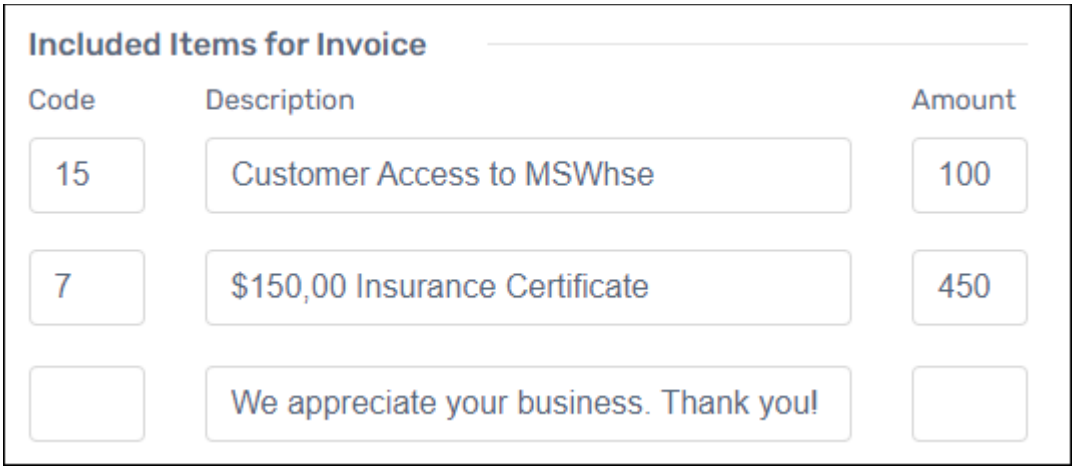


Figure 1: Included Items for Invoice with lines used for both invoicing and a note

Establish recurring invoice lines by editing a Customer's account. From **Customer** > choose a **Customer Account**. Click **Edit** on their **Profile** tab. The new setup area is called **Included Items for Invoice**. Set the Code, enter any description you wish, and enter the dollar amount. These fields always remain editable; therefore, for example, for those charges that can change from month to month, simply update the amount and save.

> **NOTE:** The fields can be edited after generating an invoice; however, once an invoice is Finalized, whatever is in those fields at that time will be on the final invoice.

If using these lines to add a note to the invoice, leave the Code and Amount areas blank. Enter your note in the Description field(s), as shown in the third line in Figure 1.

When exporting the invoice, the Code will list under **ItemId** on the invoice export. If the line has no amount or zero amount, it is excluded from the export.

INTERNAL REFERENCE:
WD-3748

Customers

Customers can be linked to warehouse(s).

A new area was developed to enable the ability to link Customers to the specific warehouse(s) that they use to store their goods. This new area is called **Associated Warehouse(s)** and is located on a **Customer Account** > **Profile** tab > **Edit Customer** screen.

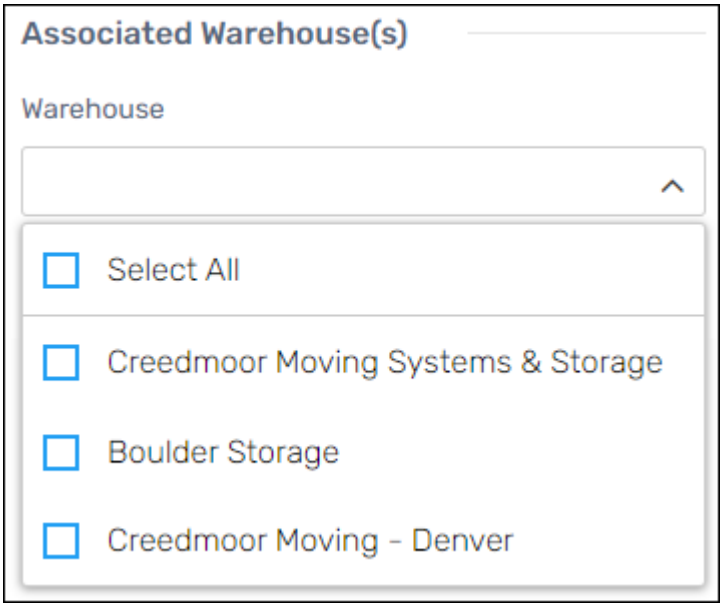


Figure 2: New Associated Warehouse(s) feature

The benefits for internal and external users are:

<u>For internal users (such as warehouse users):</u> When working with a transaction, all customers currently list in Customer dropdown selectors for all the warehouse options. By using **Associated Warehouse(s)** to link customers with specific warehouses, the Customer dropdown selector can be reduced to just list those customers which are linked to a specific warehouse. Even by apply the **Associated Warehouse(s)** feature to some of your customers, these dropdowns can be streamlined and be more efficient.

> **NOTE:** The Customer dropdown selector options are also linked to an internal user's **Warehouse Permissions** set by Admin under **Administration > Accounts & Permissions > Accounts tab >** choose **User** and then **Edit** to grant permissions to access specific warehouse(s).
>
> As an example, if an internal user, Bobbie, has his **Warehouse Permissions** set to just Warehouse A, then Bobbie will only see customers in his Customer dropdown selector that are associated to Warehouse A.

If Bobbie's **Warehouse Permissions** are set to include Warehouse A and Warehouse B, both Warehouse A and Warehouse B customers will be listed in his Customer dropdown selector, even if he is working on a transaction for Warehouse A. Should Bobbie accidentally choose a Warehouse B customer for a Warehouse A transaction, a warning will appear indicating that customer is not associated to that warehouse.

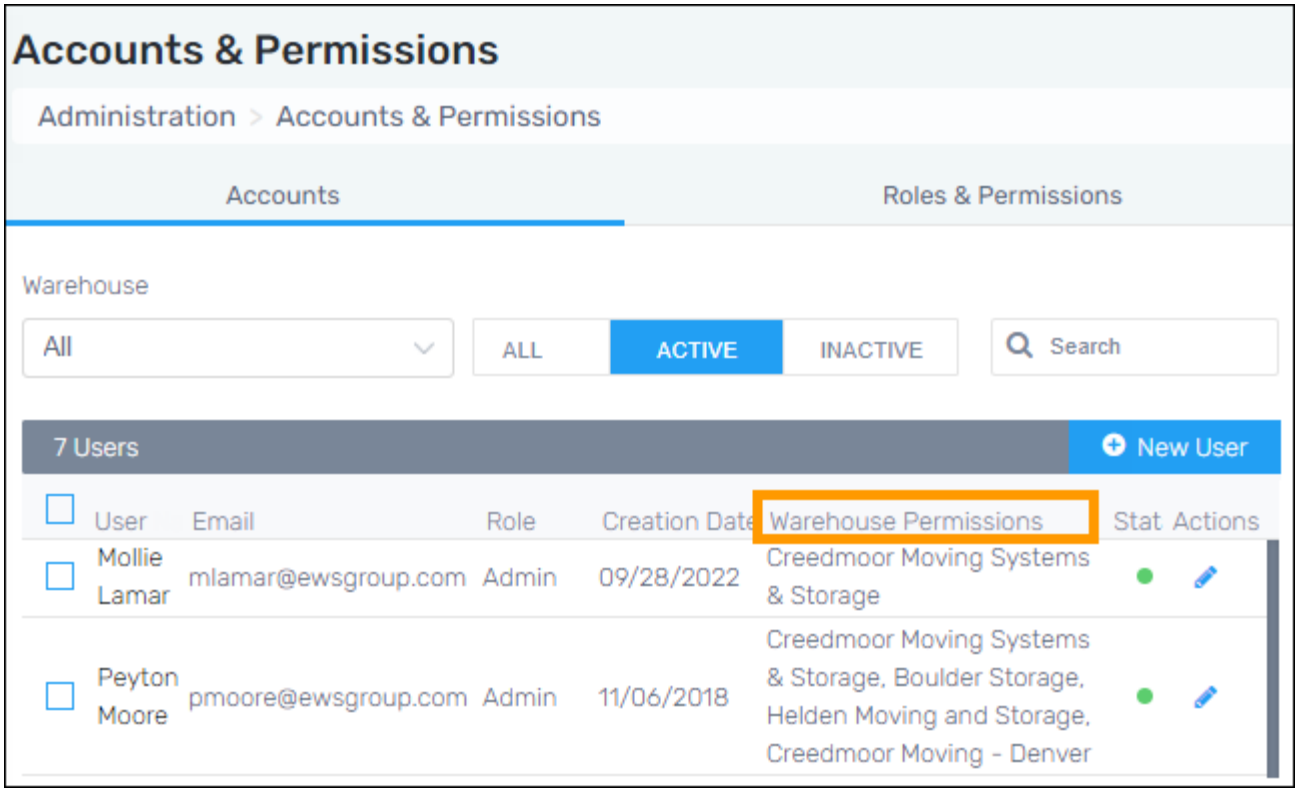


Figure 3: Warehouse Permissions setting on Accounts and Permissions

<u>For external, *Customer Facing Web* customers:</u> By using **Associated Warehouse(s)** to link a Customer Facing Web customer with just the warehouse(s) they use for their inventory, that customer will only have those associated warehouse(s) in their Warehouse dropdown.

To link existing customers with a warehouse, from the menu go to **Customer > choose a Customer account**. From their **Profile** tab, click **Edit** to open to the **Edit Customer** screen. Towards the bottom of the **Edit Customer** screen, notice the new setup area called **Associated Warehouse(s)**. Simply click the **dropdown** and check however many warehouses should be associated with that Customer. Click **Save**.

When creating new customer profiles, the **Associated Warehouse(s)** setup area will be available on the **Add New Customer** screen.

NOTE: The default setting, which is when nothing is manually set for Associated Warehouse(s), is the same as selecting **Select All**. The reason is to make sure existing customers continue to have access to all the warehouses options just like before this release. As this feature is designed to narrow down warehouse options, it is prudent to not require our customers to have to set access to warehouses for every customer.

This is the Customer dropdown selector referenced throughout this description:

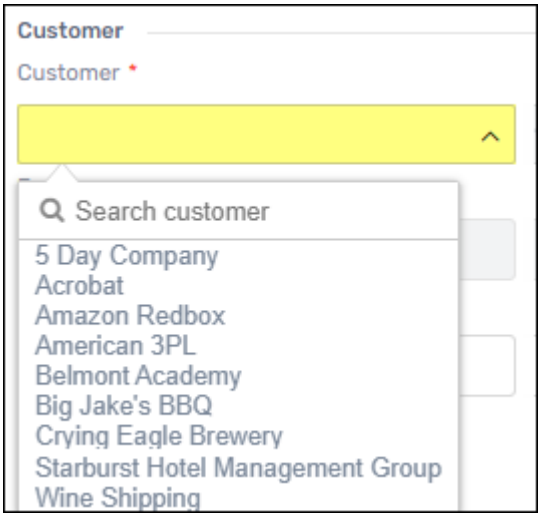


Figure 4: Customer dropdown selector

INTERNAL REFERENCE:
WD-3747

Transactions

A new report, Warehouse Receiving Report, is available for completed Inbound Transactions.

Warehouse Receiving Reports generate when an Inbound Transaction is completed. The Warehouse Receiving Reports automatically attaches to transaction notification emails, and they can also be printed.

To print, select an Inbound Transaction under COMPLETED and click the **ellipses** (three dots) as shown in Figure 5. Click **Warehouse Receiving Report** to generate the report. Open the file to download and print on your office's system. The report is a PDF and will print on 8 ½" x 11" paper.

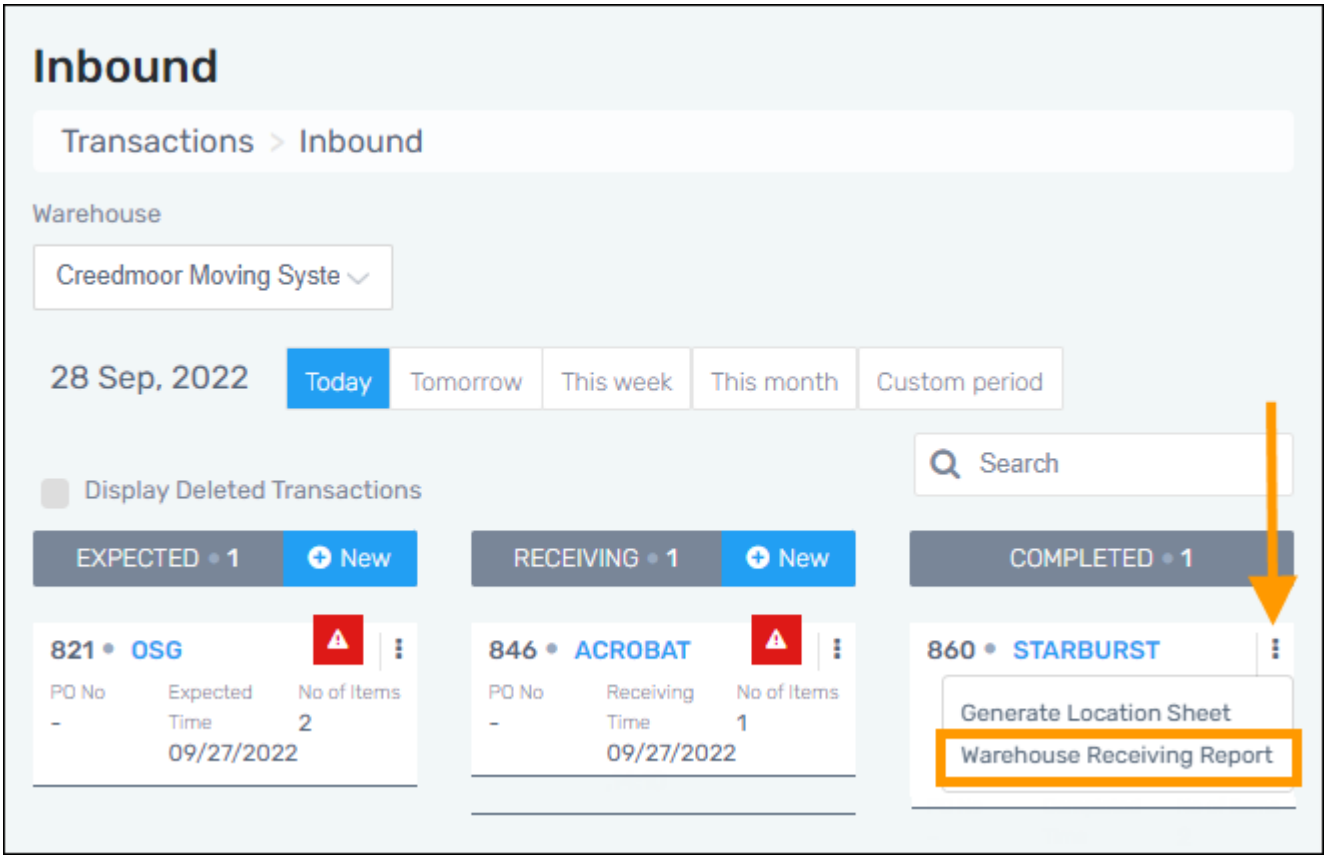
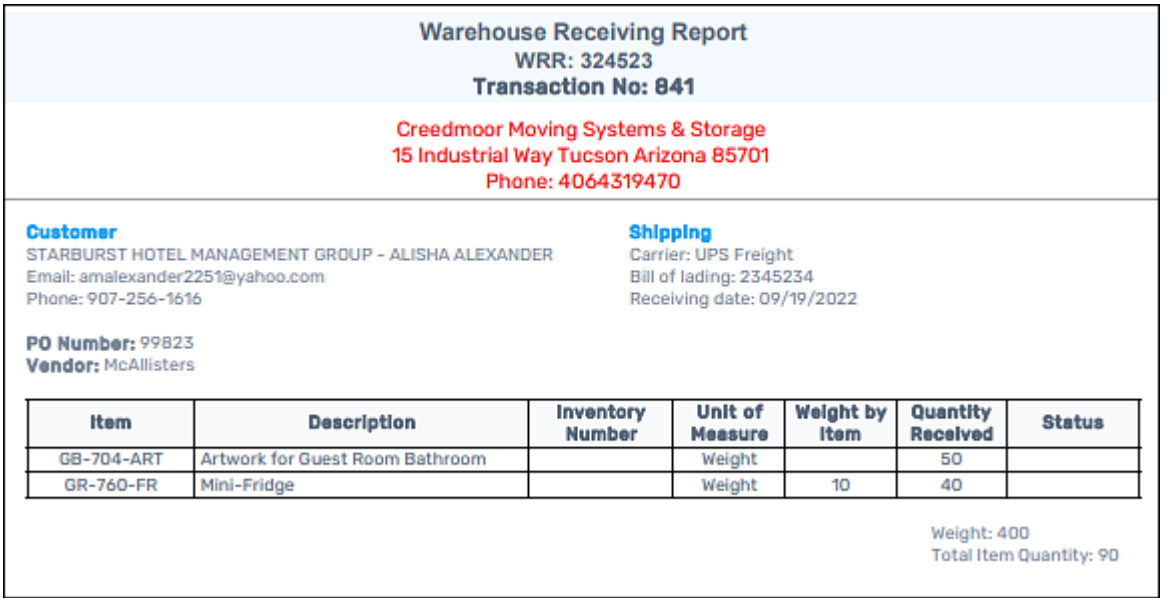


Figure 5: Access Warehouse Receiving Reports from Completed Inbound Transactions

The Warehouse Receiving Report does list Weights by Item Number, if they are in use for listed items.



Warehouse Receiving Report
WRR: 324523
Transaction No: 841

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

Customer
STARBURST HOTEL MANAGEMENT GROUP - ALISHA ALEXANDER
Email: amalexander2251@yahoo.com
Phone: 907-256-1616

Shipping
Carrier: UPS Freight
Bill of lading: 2345234
Receiving date: 09/19/2022

PO Number: 99823
Vendor: McAllisters

Item	Description	Inventory Number	Unit of Measure	Weight by Item	Quantity Received	Status
GB-704-ART	Artwork for Guest Room Bathroom		Weight		50	
GR-760-FR	Mini-Fridge		Weight	10	40	

Weight: 400
Total Item Quantity: 90

Figure 6: Warehouse Receiving Report

The Warehouse Receiving Report is also automatically attached to transaction notification emails. The top of a notification email is shown in Figure 7 and shows the Warehouse Receiving Report attachment. Unlike links,

such as *Bill of Lading.png* also in Figure 7, which expire within 30 days, this report is in the PDF format so it will always be accessible from the email.

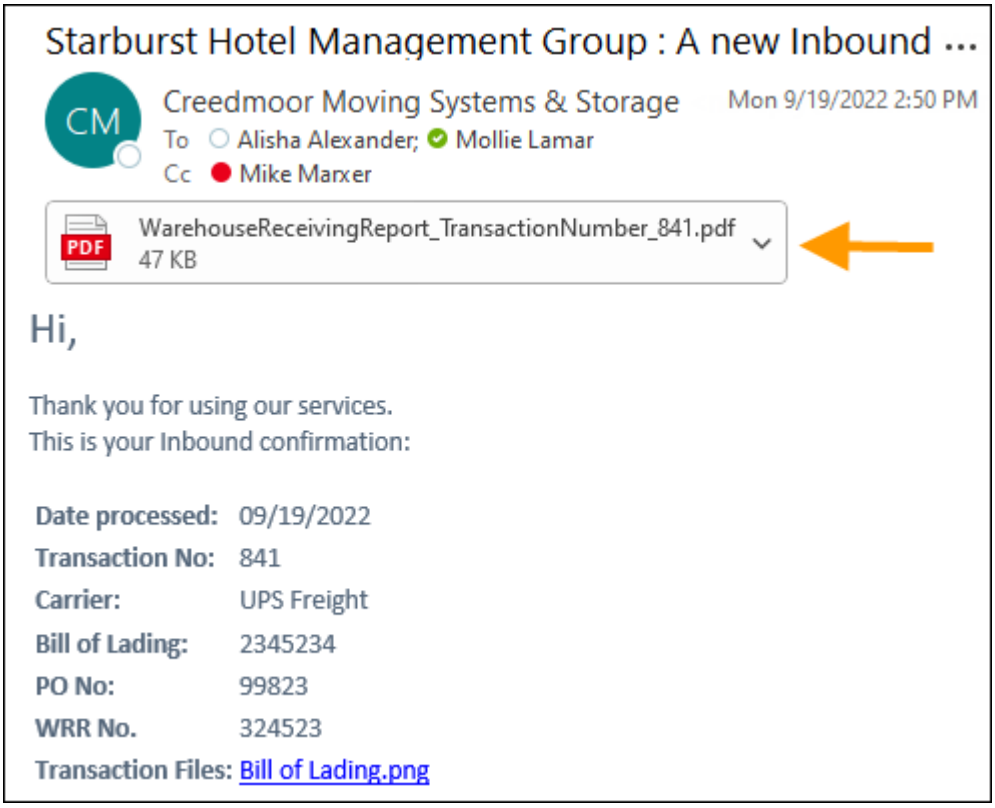


Figure 7: Part of a Transaction notification email with a Warehouse Receiving Report attachment

INTERNAL REFERENCE:
WD-3785

Reports

***Include Item Details for Weight Per Transaction* is a new option in Transaction Reports.**

There is a new checkbox under Transaction Report called **Include Item Details for Weight Per Transactions**. This new option allows the ability to list the line items that are in "weight per transactions" transactions. Previously, weight transactions were not detailed in transaction reports for customers setup as weight per transaction. The weights will list on the Transaction Report as well as be included when the report is exported.

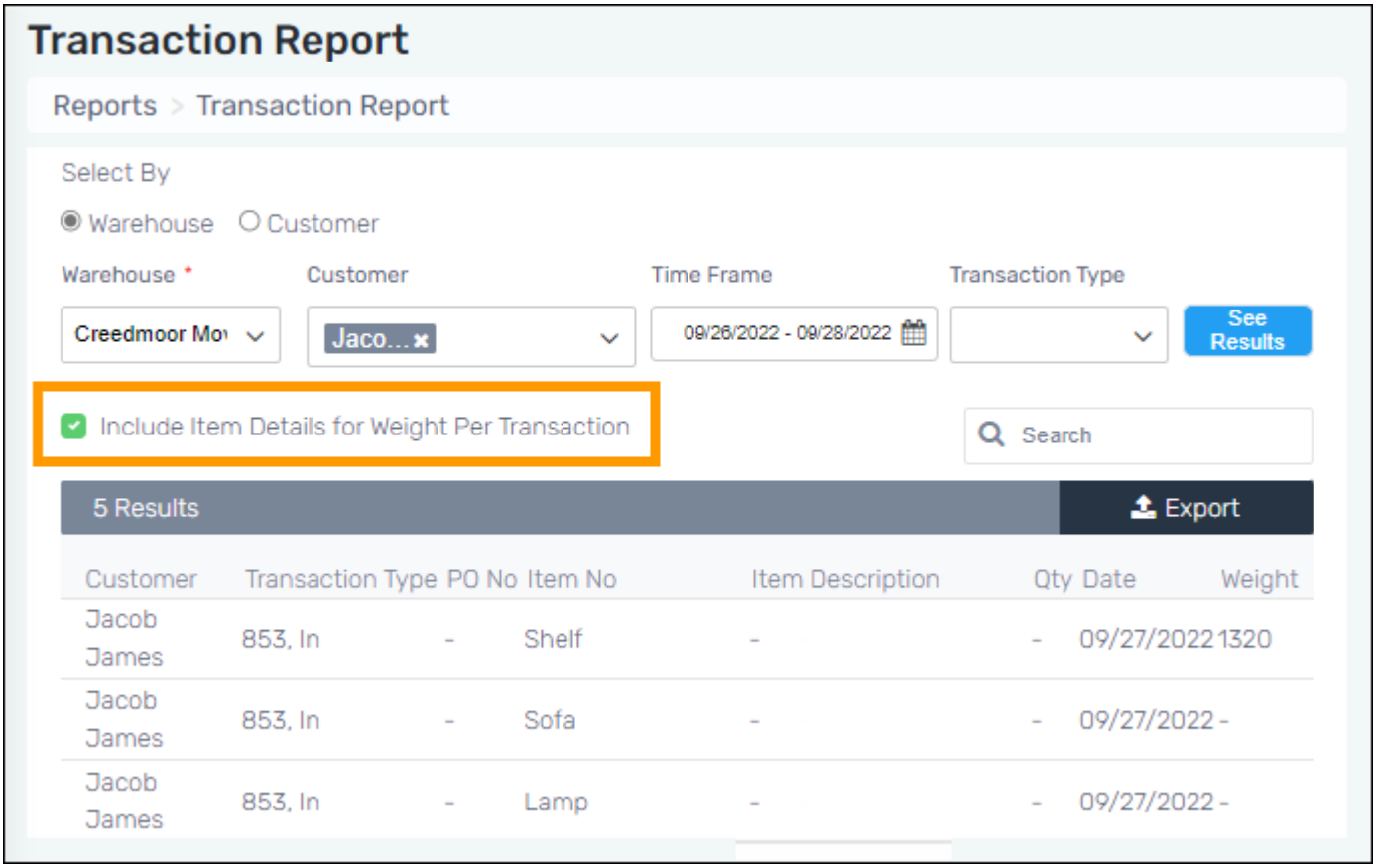


Figure 8: Include Item Details for Weight Per Transaction

From the menu, choose **Reports > Transaction Report**. Click the checkbox for **Include Item Details for Weight Per Transaction** to choose this option. If when the Transaction Report is exported and there are multiple line items on a transaction, the weight of the transaction will be on the first line item of that transaction only. The subsequent line items will be blank. This is because it this is a **Weight Per Transaction** report.

Without the **Include Item Details for Weight Per Transaction** box checked, the Transaction Report is as shown in Figure 9. Each line item from transaction is not listed.

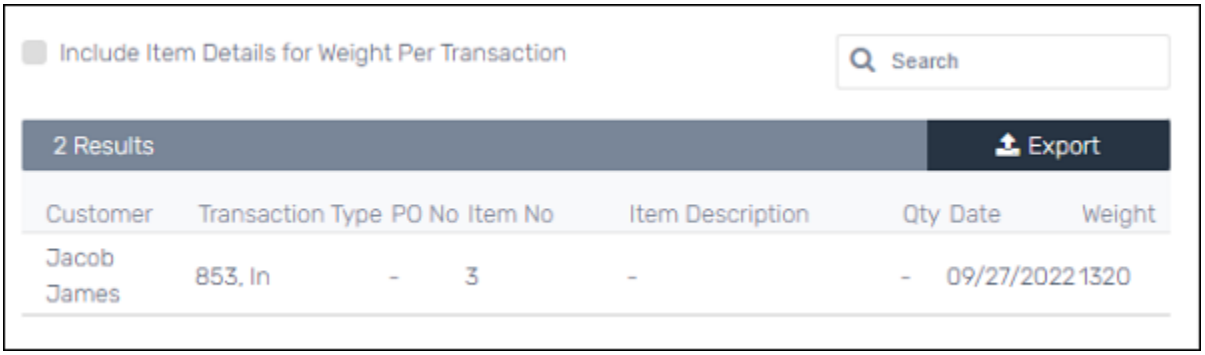


Figure 9: Transaction Report with *Include Item Details for Weight Per Transaction* not checked

INTERNAL REFERENCE:
WD-3791

MSWhse September 2022 Enhancements

This section lists the enhancements added to MSWarehouse.

Transactions

The PO Number selector is now available in the *Add Item from Item Grid* option.

A PO Number selector has been available when choosing individual Items on an Outbound Transaction. Now, this feature is also available when using the **Add Items from Grid** option. From the **Add Items from Grid** screen, click an item to see the PO Selector (Figure 10).

As a reminder, the **PO Number selector** (or dropdown) allows the ability to pull inventory on Outbound Transactions based on a specific purchase order number. If a purchase order number is entered on an Inbound Transaction, the purchase order will be associated with all the items on that transaction.

The **PO Number selector** offers the following options: *Without PO* and the *PO Number(s)* entered when receiving the item. If a PO number is selected, only the inventory received against that PO Number and that inventory's location(s) will be available in the Item Grid for selection. If *Without PO* is chosen, only inventory received that didn't have a purchase order number association will list.

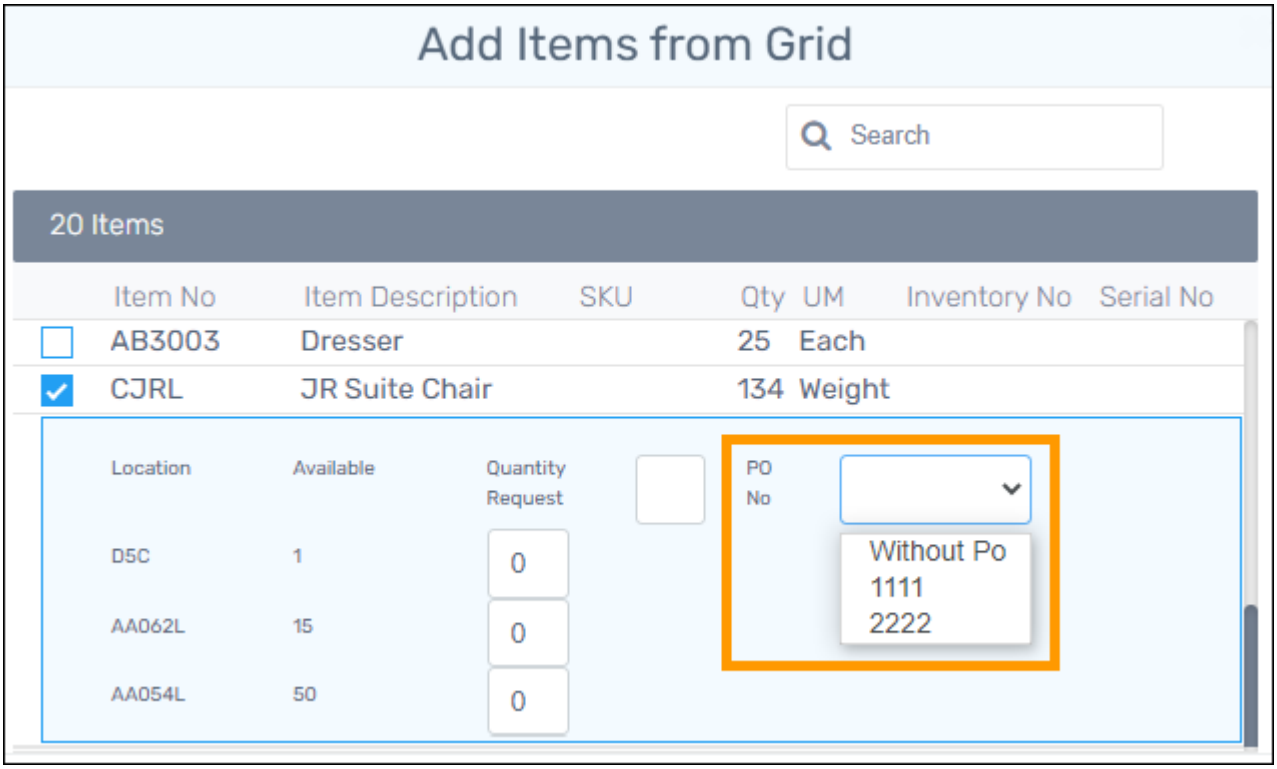


Figure 10: PO Selector on Add Items from Grid option

INTERNAL REFERENCE:
WD-3820

Transactions

The Bill of Lading field can now accommodate up to 100 characters.

For those Bill of Lading numbers that are larger than the Bill of Lading field on your screen, simply enter the number required and the field will scroll to allow the entry of up to 100 characters. Once entered, to see the full number, click into the Bill of Lading field and use the arrow keys to scroll to the right. Another option to see the entire number is to click in the field and drag your mouse to the right to scroll and see the additional digits.

Lastly, if you have a Bill of Lading number that exceeds this limit, we would love to see it!

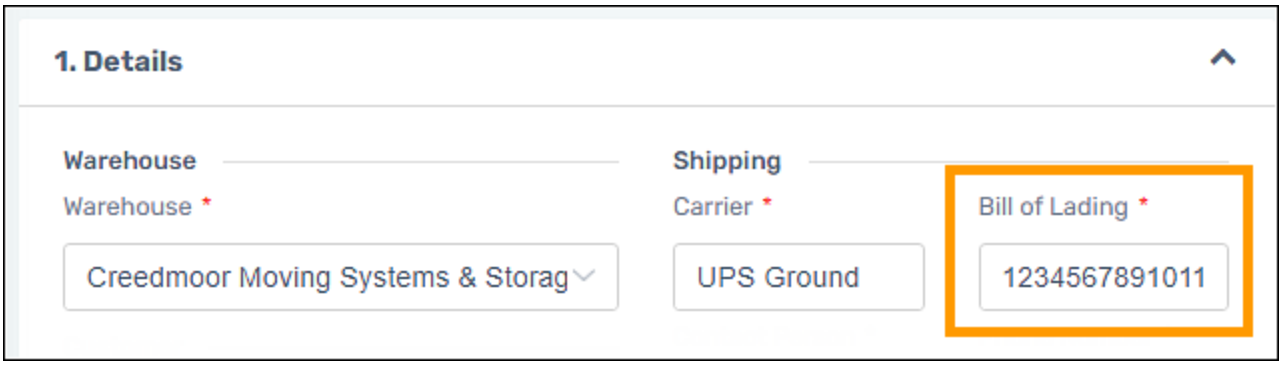


Figure 11: Bill of Lading field

INTERNAL REFERENCE:
WD-3789

MSWhse September 2022 Fixes

This section lists the fixes added to MSWarehouse.

Customers

For new Anniversary Date Billing customers, the receiving date of the first Inbound Transaction can be set up to 30 days prior to the current Standard billing month.

Before this update, the system had a hiccup that would not allow the first receiving date of a new Anniversary Date Billing customer to be in the month prior to current billing month in use for Standard Invoicing.

To better explain, notice in Figure 12 that from Billing & Payments > Generate Invoices > Standard Invoicing tab, the month displayed is September 2022. Previously, the first receiving date of an Anniversary Date Billing customer could not be in the month of August 2022. As this ability is needed, the issue was corrected.

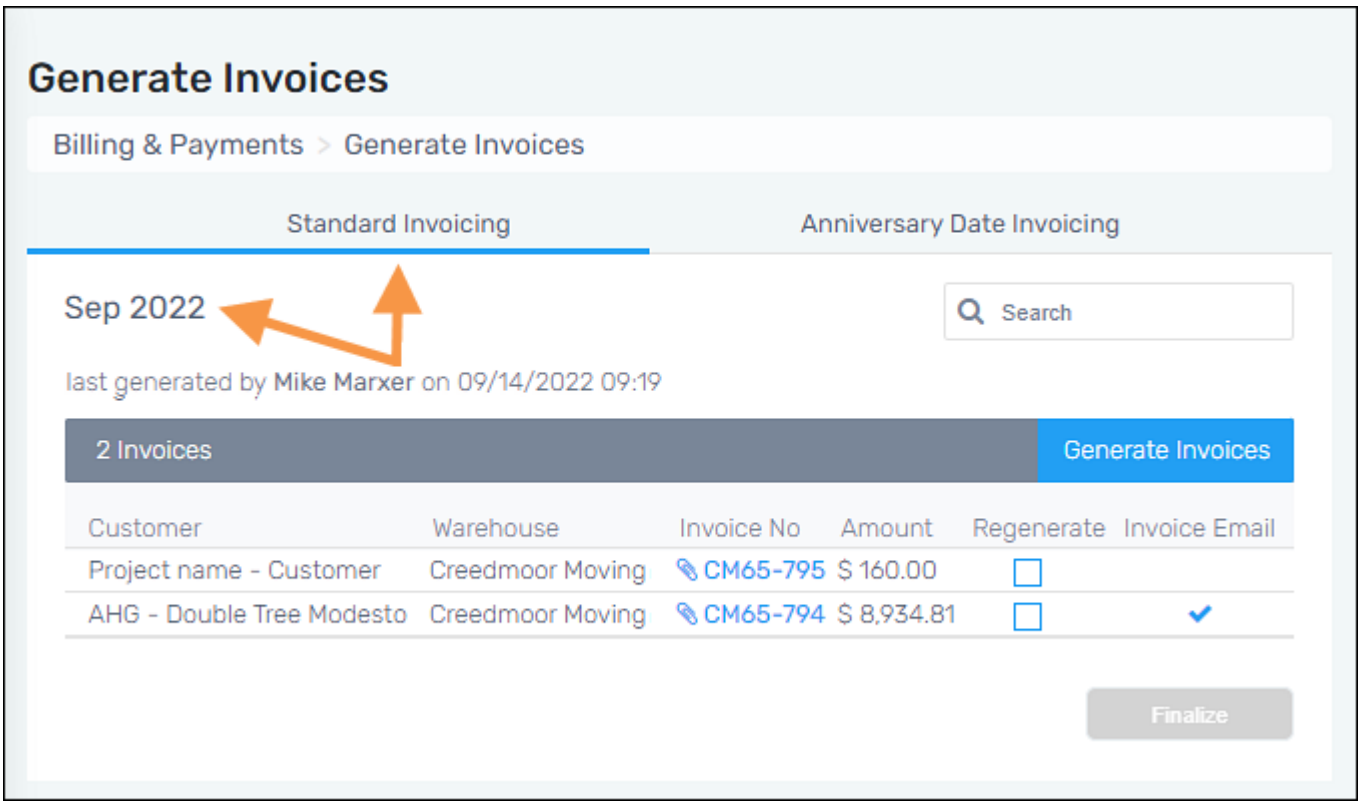


Figure 12: Billing Month noted on Standard Invoicing tab

INTERNAL REFERENCE:
WD-3802