



#### Release Information

## MSWhse Release Update

**MSWhse Release Update**

Version: June 2023

## June 2023 Summary

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

| # | Change Summary       |
|---|----------------------|
|   | New Product Features |
| 3 | Release Enhancements |
| 2 | Release Fixes        |

### Technical Support

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

**Support:** <http://mswhse.com/support/>

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### Edition

June 2023

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### Printing Information

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# MSWhse June 2023 Enhancements

## Transactions

Generate Location Sheets within Move Quantity, Move Location, and Adjustments.

Moving the contents of a Vault from one location to another? Create new Location Sheets using the *Generate Location Sheets* option now within Move Location. The *Generate Location Sheet* option is also now available within Adjustments and Move Quantity, as well.

The screenshot displays the MSWhse web application interface for the 'Move Location' transaction. On the left is a dark sidebar with the MSWhse logo and a navigation menu. The menu items are: Joe Eckert (user profile), Customers, Transactions (highlighted with a blue bar and a dropdown arrow), Inbound, Outbound, Adjustments, Move Location (highlighted with an orange box), Move Quantity, and Additional Charges. The main content area is titled 'Move Location' and shows a breadcrumb 'Transactions > Move Location'. Below this, the 'Warehouse' is set to 'Creedmoor Moving Systems &'. The 'What do you want to move?' section has three radio buttons: 'Vault' (selected), 'Pallet', and 'Location'. To the right, the 'Do you want to move the content or change the location?' section has two radio buttons: 'Change Vault Location' and 'Move Vault Content' (selected). The 'Move From' section includes a 'Vault\*' dropdown set to 'V200' and a 'Location Type' dropdown set to 'Floor'. Below this, the 'Location' dropdown is set to 'FREC2'. The 'Move To' section includes a 'Vault' dropdown (empty), a 'Pallet\*' dropdown set to 'P912', a 'Location Type\*' dropdown set to 'Racks', and an empty 'Location\*' dropdown. At the bottom left, a note states 'This Vault contains 1 items with Pallet as Unit of Measure ...'. At the bottom right, a checkbox labeled 'Generate Location Sheet' is checked and highlighted with an orange box.

### INTERNAL REFERENCE:

WD-3768

## Reports

### Each Report has Permissions.

Permissions can now be granted on a report-by-report basis. Under the Administration > Accounts & Permissions > Roles & Permissions tab, set permissions to access Reports by setting either “None” or “Full” to Warehouse roles or CFW clients. “None” means the user cannot access the report. “Full” grants the ability to use that report’s functionalities.

**Accounts & Permissions**

Administration > Accounts & Permissions

Accounts Roles & Permissions

☐ Warehouse ☒ CFW Client XYZ

**Client XYZ** [Add Role](#)

| Permission                           | Level  |
|--------------------------------------|--|
| > <b>Transaction</b>                 |  |
| > <b>Billing</b>                     |  |
| > <b>Administration</b>              |  |
| ▼ <b>Reports</b>                     |  |
| Reports Expected Quantity Report     | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Reports FIFO Inventory Report        | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Reports Inventory By Location Report | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Reports Inventory Report             | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Reports Transaction Report           | <input checked="" type="radio"/> None <input type="radio"/> Full |
| Reports Vault History Report         | <input checked="" type="radio"/> None <input type="radio"/> Full |
| > <b>Other</b>                       |  |

[Save](#)

### INTERNAL REFERENCE:

WD-3969

## Billing & Payments

### Custom Invoice Lines are included in Exports.

Custom Invoice Lines are included in Billing & Payments Exports, so that the amounts on the Export match the Invoices. Each Custom Invoice Line will have its own column in the Export.

### Customers

Customers > Crying Eagle Brewery

Profile
Contact Info
Iter Item Numbers
Custom Rates
Additional Charges

Duplicate
Edit

**Status**

Active Customer
**YES**

**Customer Details**

Customer No
Crying Eagle Brewery
Company Name
Crying Eagle Brewery
Type
Commercial
Salesperson
-

**Note**

Empty Bottle

**Documents**

+ Upload Customer Documents

**Billing Details**

Bill Customer
**YES**
Anniversary Date Invoicing
**NO**
Billing Method Calculation
High-watermark per Day
Customer Reference
-
WRR Number Required
**YES**
Invoice/PO#
-

**Shipping Details**

**Included Items for Invoice**

| Code | Description                 | Amount |
|------|-----------------------------|--------|
| 19   | Access to MSWhse Portal     | 200    |
| 21   | Insurance                   | 95     |
|      | We appreciate your business |        |

**INTERNAL REFERENCE:**  
WD-3972

# MSWhse June 2023 Fixes

## Reports

**Inventory Report is separating Item Numbers into separate rows for pending transactions.**

We like to keep things concise. The problem was when an Item Number was in pending inbound or outbound. Each transaction was listing on separate lines. In the example below, the Inventory Report has the Pending In and Pending Out shown on the same line as Qty, as they should be.

### Inventory Report

Reports > Inventory Report

Customer \* Warehouse As of

Belmont Aca... Creet x +1 06/28/2023

See Results Search

4 Results Export

|   | Warehouse | Item No | Item  | SKU | Qty | UM   | Inventory No | Serial No | Pending In | Pending Out |
|---|-----------|---------|-------|-----|-----|------|--------------|-----------|------------|-------------|
| > | CM14      | Board   | Boarc | -   | 11  | Each | -            | -         | -          | -           |
| > | CM14      | Box     | Box   | -   | 10  | Each | -            | -         | -          | -           |
| > | CM14      | Desk    | Desk  | -   | 60  | Each | -            | -         | 10         | 10          |

**INTERNAL REFERENCE:**  
WD-3981

## Transactions

**“Quantity Available” is now counting items that were in Processing when Invoices were finalized.**

When invoices are generated and if an Invoice contains an Item Number that is currently within a Processing Outbound transaction, the Quantity Available for those Item Numbers was not accurate.

**INTERNAL REFERENCE:**  
WD-3941