Warehouse Management System

Manual

Table of Contents

Introduction

The functionality of WMS (Warehouse Management System) is designed to automate warehouse management systems and to improve the efficiency of warehouse logistics management.

The functionality contains the following tabs:
- Task Management
- Shipment Management
- Work Queue
- Action History
- Warehouse Monitor
- Trailer Search
- Company Profile
- Shunter Board

Task Management

On the first tab - "Task Management" at the top right corner there is a button "Show Filters", by clicking on it a set of filters for creating tasks will appear.

Near the drop-down menu for choosing a warehouse (top left), there are the checkboxes for filtering cargoes to display records in the DashBoard. A set of fields for filtering allows you to filter a task by its number, start date, status, sender, dispatcher, trailer, driver, door number and probill number (PB number).

Each task appears as a line in the task table. Each such line is colored with an informative color:

- ◼ Incoming / task for incoming cargo

- ◼ Outgoing / task for outgoing cargo

- ◼ Outgoing virtual / the task of creating cargo that is not yet in stock

- ◼ Shunt / the task of moving a trailer from one door to another

- ◼ Swing / the task of moving cargo from one trailer to another

- ▮Custom / individual task for a certain cargo
- ▮MoveIn / the task of moving cargo from yard to a warehouse
- ▮MoveOut / the task of moving cargo from warehouse to a yard

The main DashBoard window is the list of tasks with the ability to edit each one of them.

#	Task #	Start Date ↧	ETA/Ship By	Task Type	Status	Created Date	Start Processing Date	Date Completed	Shipper	Dispatcher	Trailer #	Driver	Door #	Discrepancies	Actions
12		2021-02-09	23:00	Incoming	expected	2021-02-09 18:11									✏ Edit Task ▾

Edit Incoming Task #   (   ) (expected)

Task   Attachments

Priority *   Start Date *   ETA *
18/   09-02-2021   📅   23 : 00

Warehouse   Dispatcher

Expected Trailer   Trailer Parking Space
              ✕   ➕

Driver
              ✕   ➕

➕ Select Virtual Shipments   ➕ Add New Shipment

PB

PB # *   Shipment Parking Space

Expected (Stored 0)*   Units *
                    Full Truck Load

Incoming cargo

By pressing the button [Add Incoming...] - a window opens for filling in information on the task for the incoming cargo. Information contains the following fields: choosing a warehouse and a dispatcher, setting the task processing priority, start of the task execution, its approximate time of arrival.

Add Incoming Task ()

Warehouse *
Select warehouse

Dispatcher *
First select warehouse

Priority *
Priority

Start Date *
dd-mm-yyyy

ETA *
HH   MM

Trailer

➕

Trailer Door

Driver

➕

Step 1: ➕ Select Virtual Shipments   Step 2: ➕ Add New Shipment

Save   Cancel

This window contains fields for selecting Trailer, Driver and Trailer Door:

By pressing the button ➕ next to the Trailer field, it becomes possible to add information about the trailer by filling in the following fields: Trailer Owner, Trailer Number and selecting the type of trailer;

By pressing the button ➕ next to the Driver field, it becomes possible to add a driver.
The Trailer Door field allows you to select the number of the door where the cargo will arrive.

Also, the Add Incoming window allows you to select a cargo from the list of previously created cargoes by clicking on the button ➕ Select Virtual Shipments or create a new cargo by clicking on the button ➕ Add New Shipment .

Outgoing cargo

You can create a task for outgoing cargo by clicking on the button Add Outgoing... .
In the newly opened window, you can select the name of the warehouse, dispatcher, set the task processing priority, the start of its execution and the time of dispatch. Also, there are fields for selecting/creating a trailer, door numbers and driver information.

Add Outgoing Task ()

Auto create incoming task on another terminal ☐

Warehouse *
Select warehouse

Dispatcher *
First select warehouse

Priority *
Priority

Start Date *
dd-mm-yyyy

Ship By *
HH   MM

Trailer   ANY trailer

Trailer Door

+

Driver

+

Add PB on trailer   Step 1: **+ Select Shipment**   Step 2: **+ Add Virtual Shipment**

Save   Cancel

Available buttons:

Add PB on trailer - allows you to add a probill number

+ Select Shipment - allows you to select a shipment

+ Add Virtual Shipment - add shipment from the list of previously created

Moving a trailer

When creating a task to move a trailer Add Shunt... from one door to another, you can fill in the following fields: the name of the warehouse, the name of the dispatcher, the priority of task processing, the start date of work on the task and its approximate completion, information about the trailer and door number, dispatcher comments.

Add Shunt Task ()

Warehouse *
Select warehouse

Dispatcher *
First select warehouse

Priority *
Priority

Start Date *
dd-mm-yyyy

ETA *
HH   MM

Trailer ANY trailer

Trailer Door

+

Dispatcher Descriptions / Instructions

Save   Cancel

Moving a cargo

In order to create a task for moving a cargo from one trailer to another, please click on the button
Add Swing... , after that it will be possible to select a warehouse, dispatcher, task processing priority, start date, approximate end date and information about the driver. Also, there are fields for filling in information about the original trailer and the one to which the cargo was moved; information about the door number where the cargo is taken from and where to it should be moved. By clicking on the button + Add New Shipment (inside the 'Add Swing' window) we can add information about the new cargo.

Add Swing Task ()

Warehouse *
Select warehouse

Dispatcher *

Priority *
Priority

Start Date *
dd-mm-yyyy

ETA *
HH   MM

Origin Trailer

+

Origin Trailer Door

Destination Trailer

+

Destination Trailer Door

Driver

+

+ Add New Shipment

Save   Cancel

Custom Task

You can create a custom task by clicking on Add Custom... .
When you click on the button, a window opens with the following fields: the name of the warehouse, the name of the dispatcher, the priority of the task, the date the work was started and its approximate end, information about the trailer, door number and driver. Also, if necessary, you can supplement the task with a comment or instructions.

Shipment Management

The "Shipment Management" tab is a table that includes information on the cargo.
When you select a warehouse, information appears on the relevant cargoes that belong to the selected warehouse with the ability to filter by the probill number, date, trailer and door numbers, status and task name.

Таблица дает возможность редактировать данные путем нажатия на [✎ Edit Shipment ▾].

In addition to editing the already created information on the cargo, you can also view the information by clicking on the arrow in the 'Edit Shipment' button [✎ Edit Shipment ▾]. The page that opens will look like the following (without the possibility of editing).

Shipment: Task #   Probill #   ✕

Shipment   Work Queue   Action History   Photos

PB #

Door #
Select Door ▾

Expected Amount   **Processed Amount**   **Select Units**
1   0   Skid ▾

Weight   **Select Units**   **Select Type**
Weight   lb ▾   Regular ▾

Receiver Name

Destination

Dispatcher Descriptions / Instructions

The button **Ship out...** makes it possible to add an Outgoing task with the selected loads. This option allows you to add one or more selected cargoes.

Shipment Management

Selected shipment (2)

Ship out...

Concord Warehouse ▾   ☐ Discrepancies: **2**   PB: Stored Amount: 0 ✖   PB: Stored Amount: 0 ✖

🔲 Generate Report   👁 Show Filters   ↻

☐	PB	Created Date ↓	Unit	Expected Amount	Processed Amount	Stored Amount	Expected Trailer	Actual Trailer	Door	Receiver Name	Destination	Status	Task	Task Type	Actions
☑		2021-02-09 18:29	Skid	1	0							expected		receive	✏ Edit Shipmer ▾

10

Add Outgoing Task (Warehouse)   ×

Auto create incoming task on another terminal ☐

Warehouse *   **Dispatcher** *

[dropdown]   [dropdown]

Priority *   **Start Date** *   **Ship By** *

[   ] last   [dd-mm-yyyy   📅]   [HH] [MM]

Trailer ANY trailer   **Trailer Door**

[   ] [+]   [dropdown]

Driver

[   ] [+]

[Add PB on trailer]   Step 1: [+ Select Shipment]   Step 2: [+ Add Virtual Shipment]

| 1 | 8 |
| Skid | Skid |

The button [📄 Generate Report] creates a report with information on a cargo. The report is in xlsx format and it can be saved to the computer. The report is divided into the following columns:

PB	Create Date	Unit	Expected	Processed	Stored	Expected	Actual	Door	Receiver Name	Destination	Task	Notes

The Ship Management tab can be updated at any time by clicking on the button 🔄 on the right side next to the filter button.

Work Queue

The 'Work Queue' tab makes it possible to assign tasks to a specific sender. This can be done by clicking on the 'Assign Shipper' button.

When a shipper is selected and confirmed, the Assign Shipper status in the Actions field changes to Start Processing, which (in addition to adding a shipper) further makes it possible to change the status to Processed.

By clicking on the button ⦿ Show Filters you can filter the use of the tab by the following categories: date, task number, task type and status, trailer and door, by the name of the dispatcher, shipper and by the probill number.

The button 🔄 allows you to update information on tasks in the queue.

The 'Work Queue' tab also contains information on a warehouse and a number of checkboxes to filter by the status:

The main information of the Work Queue tab is presented in a table with data for each of the tasks created earlier. Also, when you click on the task number, you can view all the detailed information (without the possibility of editing) on the task itself and on the probills associated with it.
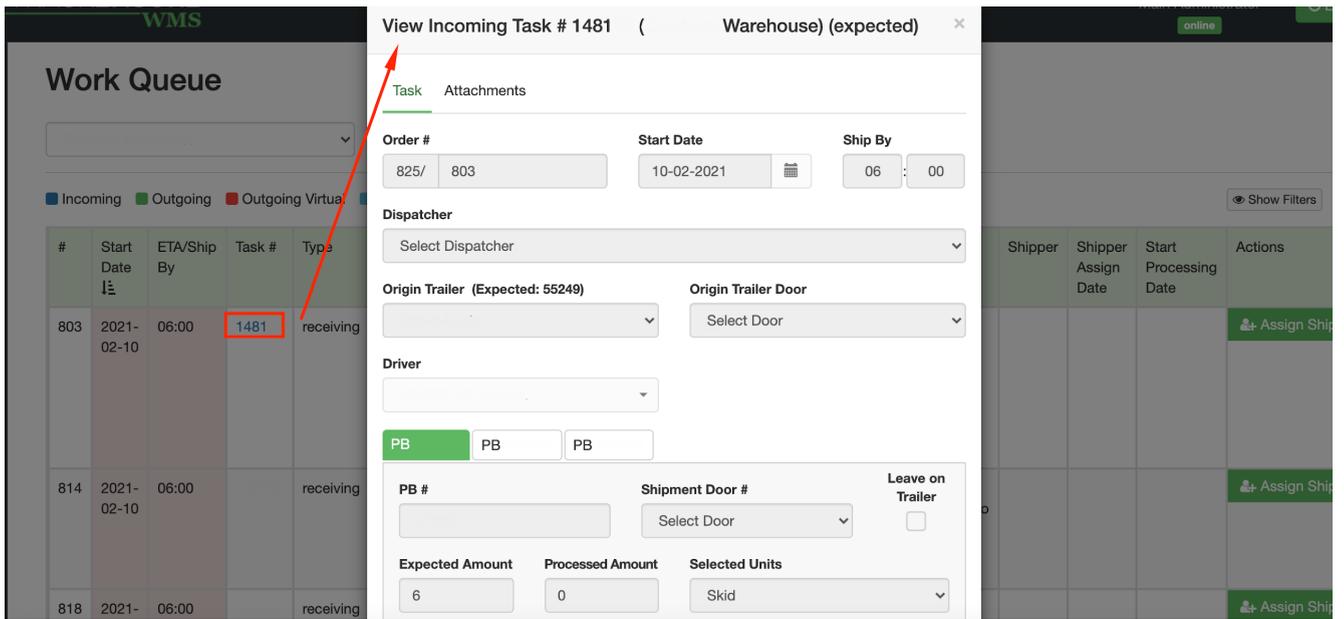
The 'View Incoming Task' window allows you to view the documents attached to this task.
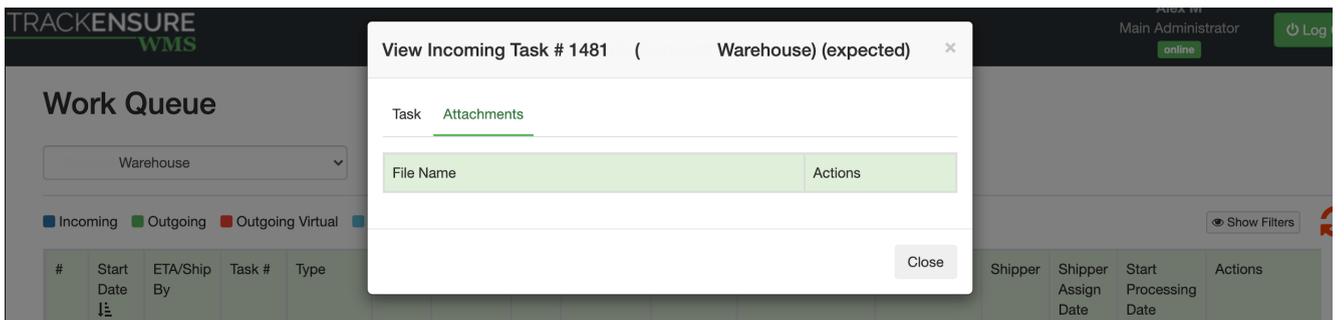
Action History

The Action History tab is a history of actions that were performed on tasks in the WMS functionality.

Above the main table, there is a filtering that allows you to narrow down the search by the name of the warehouse, task, probill number, action (that was done with the task), user type and name, and by the date range.

Warehouse ⌄					◎ Hide Filters
Task	**PB Number**	**Action Type**	**User Type**	**User Name**	**Date Range**
		⌄	⌄	⌄	

The main window allows you to view information on the history of changes for each of the tasks:

ID	Dispatcher Descriptions / Instructions	Task	ProBill	Trailer	Door	Performed By	Type	Date
2055	User logged in.						Login User	2021-03-26 08:57

Warehouse Monitor

The Warehouse Monitor tab allows you to view the location and availability of doors in a particular warehouse. The warehouse can be selected from the drop-down list. Also, the tab allows you to filter the information by the following criteria: probill number, task ID, trailer door, shipment door and location.

PB Number	Task ID	Trailer Door	Shipment Door	Location

On the right side of the screen here are three sub-tabs:

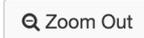🧊 Tasks   📦 Shipment   👥 Work Queue

1. Tasks - information on all the tasks.
2. Shipment - information on cargoes and their status.
3. Work Queue - list of tasks that are in the queue list.

To the left of the tabs described above there is the layout of the warehouse and the doors in it.
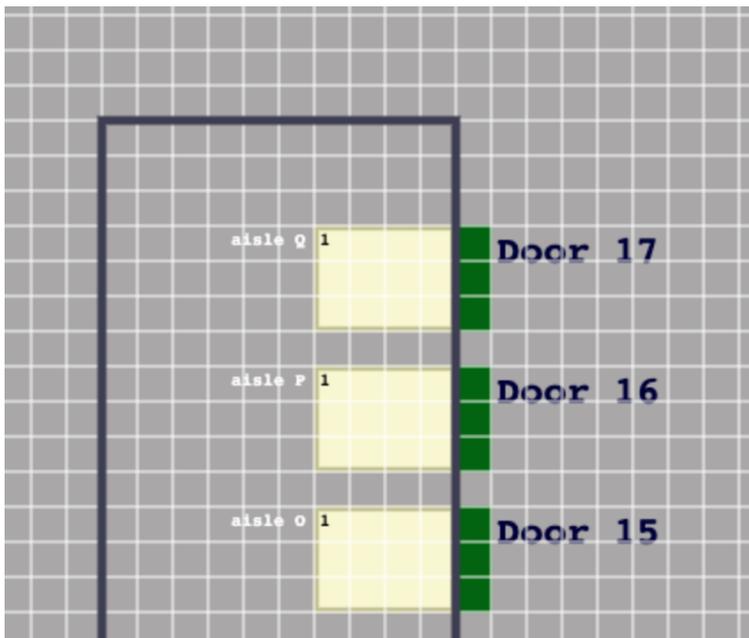
Above it there are current statuses of the doors:

🟥 the door is currently being used

🟩 the door is available and ready to be used

⬜ door is broken/out of order

🟨   door is assigned

You can enlarge or reduce the warehouse layout by pressing the 🔍 Zoom In and 🔍 Zoom Out buttons.
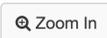
Also, the main window is a visual image of the selected warehouse. When you click on a warehouse or door, by filtering - the current status of the task on which the action is performed will be displayed in the table on the left.

Trailer Search

The Trailer Search tab is a series of trailer search options.
You can filter the search by the selected warehouse, that is located underneath the tab name:

Trailer Search

The main page of the Trailer Search tab is divided into three blocks:

1. Trailers.
This block makes it possible to find a trailer by the following criteria: trailers at location without stored shipments; all trailers at location; trailers elsewhere with stored shipments.

By selecting one of the criterias,the list of trailers appears below.
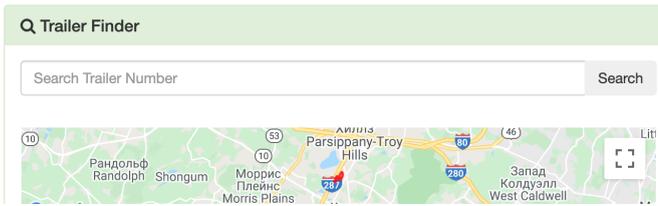
Also, in this block there is a field where you can search for a trailer by writing its number.

2. Trailer Finder
The Trailer Finder block makes it possible to find the required trailer on the map by its number, which

can be entered in the Search field.

3. Tasks.

The Tasks block is a series of criteria to choose from for a specific task.

List of criteria for searching tasks:

- tasks without trailers;
- tasks with trailers at location;
- tasks with trailers not at location.

When you select one of the criteria, a drop-down list with trailers appears. Also, as in all previous blocks, there is a field for entering a task number.
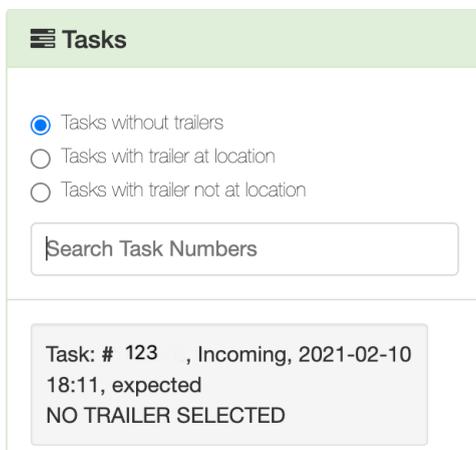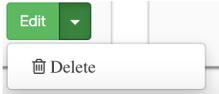
Company Profile

The Company Profile tab consists of several blocks such as:

1. By clicking on the ⓘ Info button general information about the company appears. This information includes the address of the company and the contact information of a company representative.

2. The sub-tab 🏠 Warehouse Management provides complete information on each of the warehouses, including information about the cargoes, the address of the warehouse and the contacts of the company representative.

You can edit information about the warehouse by clicking on Edit ▾ button. A window will open with the ability to change data on the warehouse, its address and contact information of the company representative. Also, the editing option allows you to change the physical address of the warehouse through the map.
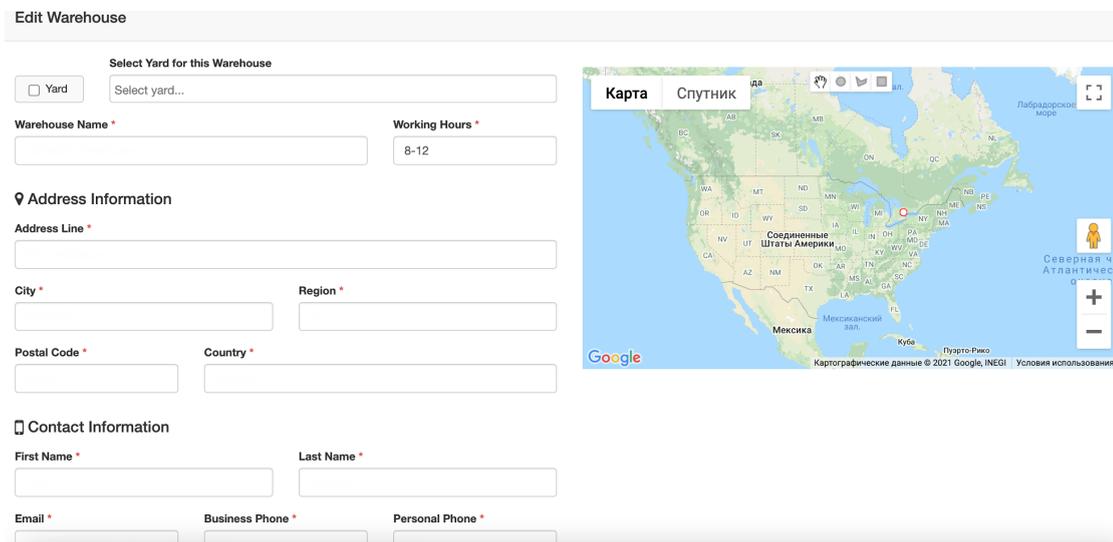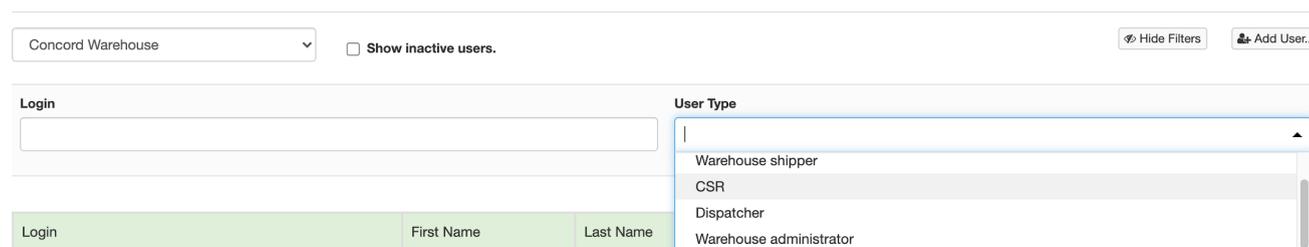

You can delete warehouse information by clicking on the Edit ▾ / 🗑 Delete button.

You can view or edit the layout of each of the warehouses by clicking on Layout ▾ / 👁 View / ✏ Edit
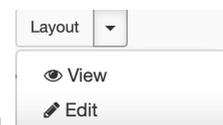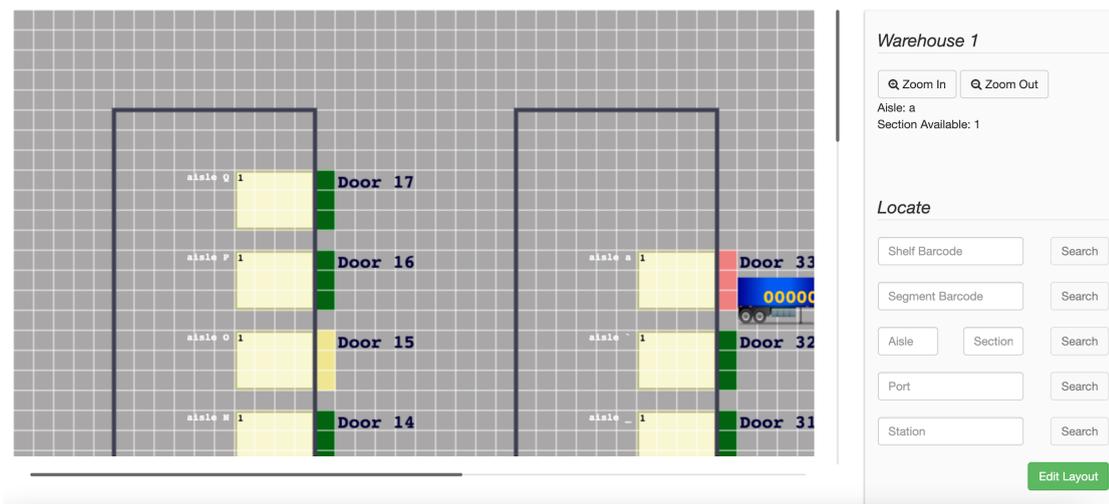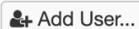
3. The sub-tab 👤 User Management contains information about each user and the level of access they have to the WMS module.
By clicking on the 'Show Filters' button we can filter users by their type.

Also, user affiliation can be filtered by the name of the warehouse, and by clicking on ☐ Show inactive users. button, you can limit the list to inactive users.

If we want to add a new user to the existing ones, this can be done by clicking on 👤+ Add User... : a window will be opened that will allow you to fill in information on the user's contact information and address.

The main table in the User Management tab shows the user's login, first and last name, access level, address, and allows you to edit the information or delete it.

Login	First Name	Last Name	Type ↓≡	Address	Actions
					✏ Edit ▾

4. When you click on 🚚 Trailers , you can filter the trailer by its owner, number, type, and status.

By clicking on Add Trailer... opens a window for adding information on a new trailer with the fields such as trailer owner, trailer number, and trailer type selection.

Add Trailer

Trailer Owner

[Trailer Owner]

Trailer Number *

[Trailer Number]

Select Trailer Type *

[▾]

[Save] [Cancel]

5. If you select the tab 👥 Drivers , you can see a table with information about the driver and the option to edit or delete this information.

Driver Name	Actions
1000	✏ Edit ▾
1012	✏ Edit ▾

Also, by clicking on Add Driver... button, you can add a new driver:

Add Driver

Driver Name *

[Driver Name]

[Save] [Cancel]