

Wdcs System Manual

Your Complete Warehouse Management System

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1. Introduction

1.1 Overview



Warehouse & Distribution Control System

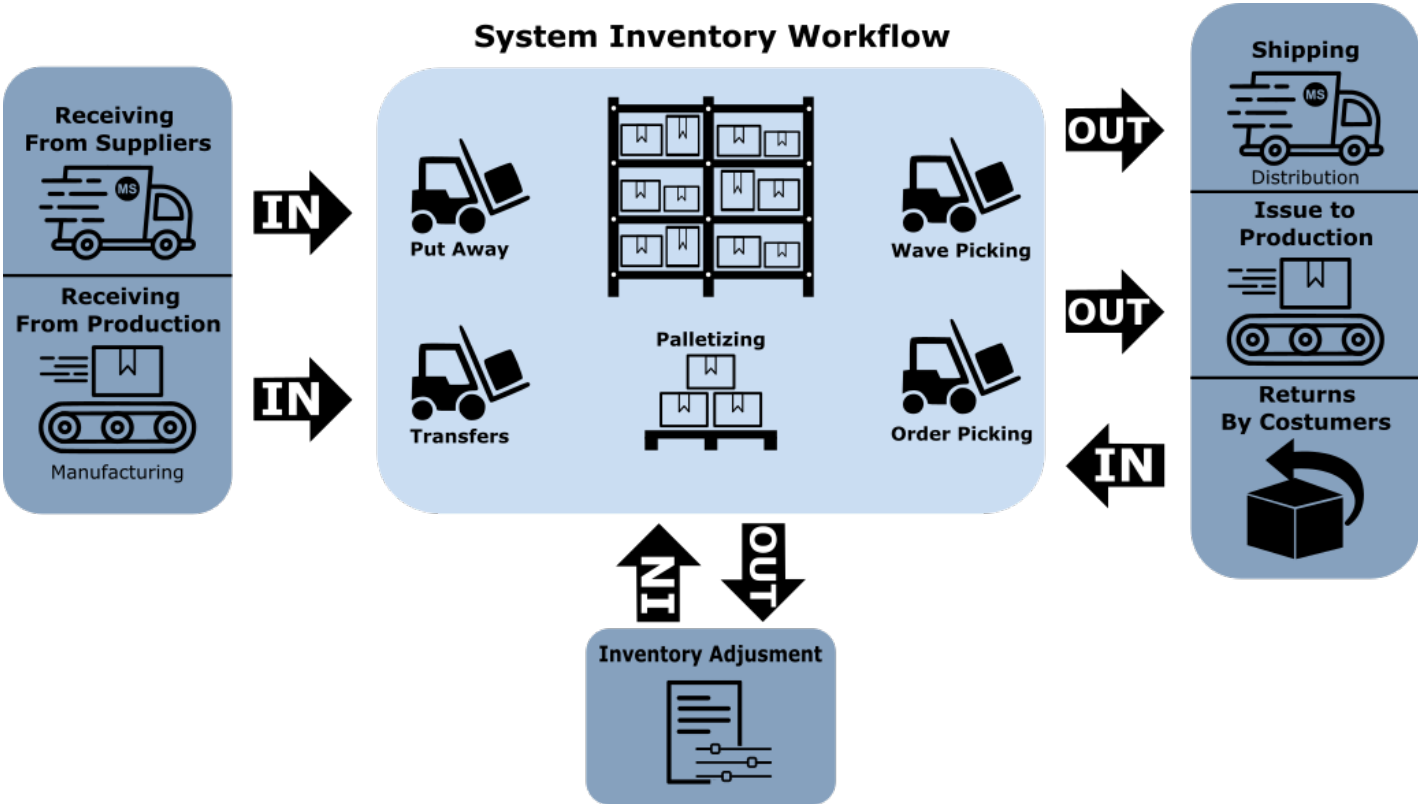
Welcome to MultiSystem's Warehouse and Distribution Control System, hereafter referred to as WDCS. The WDCS is a system intended to automate the everyday operations of a storage facility used as a distribution location, it's designed to support and optimize warehouse functionality and distribution center management. Some key features that characterize the WDCS are the ability to manage multiple units of measurements for an item (Item/Serial/Lot/Cases/Weight) and enforce FIFO/LIFO inventory movement rules. This document provides details about the key components and functionality of the WDCS.

1.1.1 Key Components

WDCS consists of two main components: a mobile wireless unit and a Web-based administration interface. Additionally the system provides a rich web API interface for ERP interaction.

1.1.2 System Overview

The Warehouse and Distribution Control System manages all the processes required to manage the inventory levels of products in a warehouse. Refer to figure below for process description and product flow within the system.



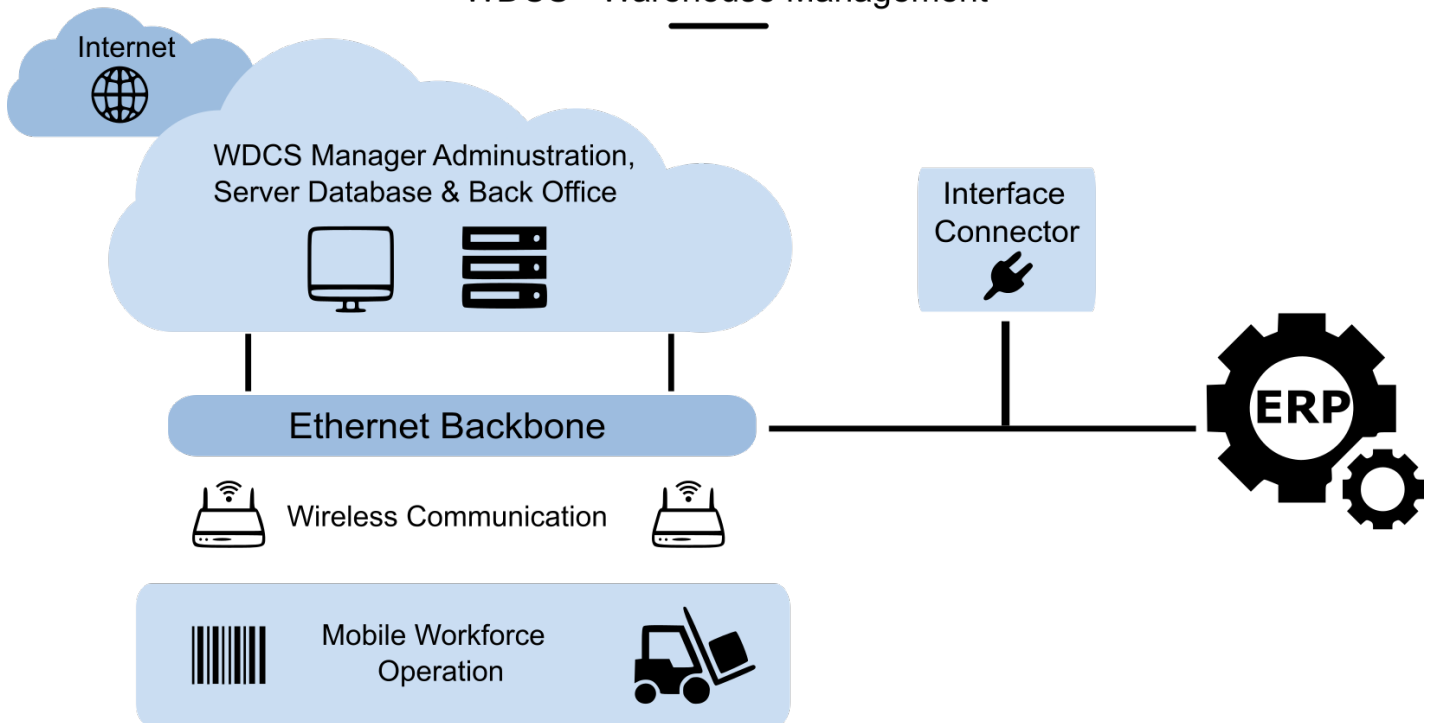
1.2 Architecture

1.2.1 Cloud

MultiSystems provides a cloud hosting of the system so the end user does not need to worry about the infrastructure. When on cloud Wdcs host main web application and warehouse console on a hosted site. Thus internet is required for usage. It is recommended to have a reliable internet connection as well as contingency planning in case of outage may occur. Note the ERP system may still be on premise. To access data in and out of the ERP a local software component should be installed. This component is the Wdcs Connector.

System Topology: Cloud

WDCS - Warehouse Management

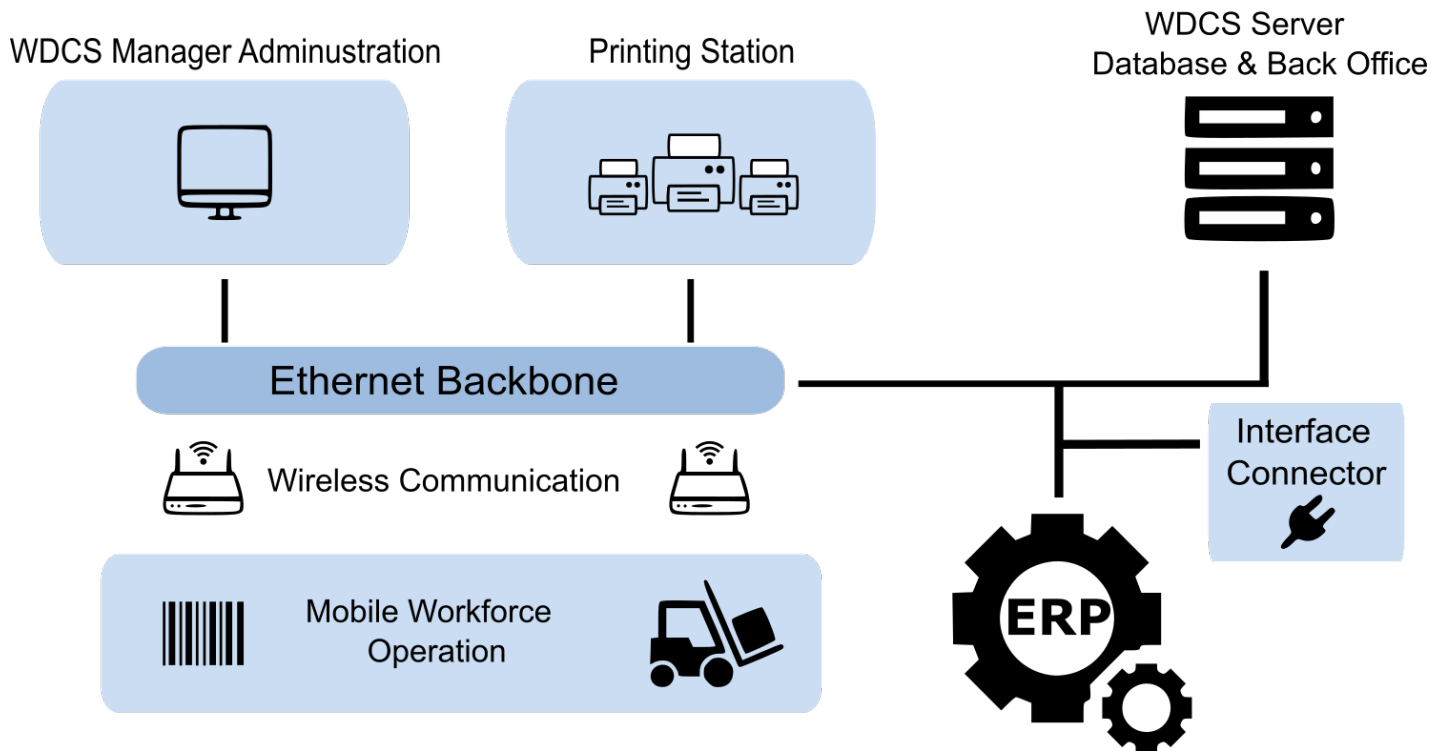


1.2.2 On Premise

On premise the client is responsible for the infrastructure.

System Topology: On Premise

WDCS - Warehouse Management



1.3 WDCS Components

1.3.1 Web Interface

The Administration Interface is powered by a web based application intended to be used by warehouse clerks. The Web Interface provides system configuration/administration through reporting.

Please see the Web interface for further details.

1.3.2 Emulation Console

The Wireless mobile device is the key component of WDCS. Most of the key transactions are performed using this module since this will become the tool of preference for any warehouse worker.

Please see the Emulation Section for further details.

1.3.3 Warehouse Integrator Portal (WIP)

Description

Please see the WIP Section for further details.

1.3.4 WDCS/ERP Link Interface

Please see WDCS Connector for further details.

2. Emulation

2.1 Overview

Like it was mentioned in the WDCS Components Page, the Wireless mobile device is the key component for WDCS. Most of the main key transactions are done using this module since this will become the tool of preference for any warehouse worker. In this section the different options available from the mobile wireless module are detailed.

Graphical User Interface Basics.

WDCS is a simple and user friendly application, but nevertheless it is necessary to discuss the main characteristics of the graphical user interface and how to move from one option to the other.

Refer to the figure below for reference.



Info

Unit may vary.

Physical Buttons and Keys

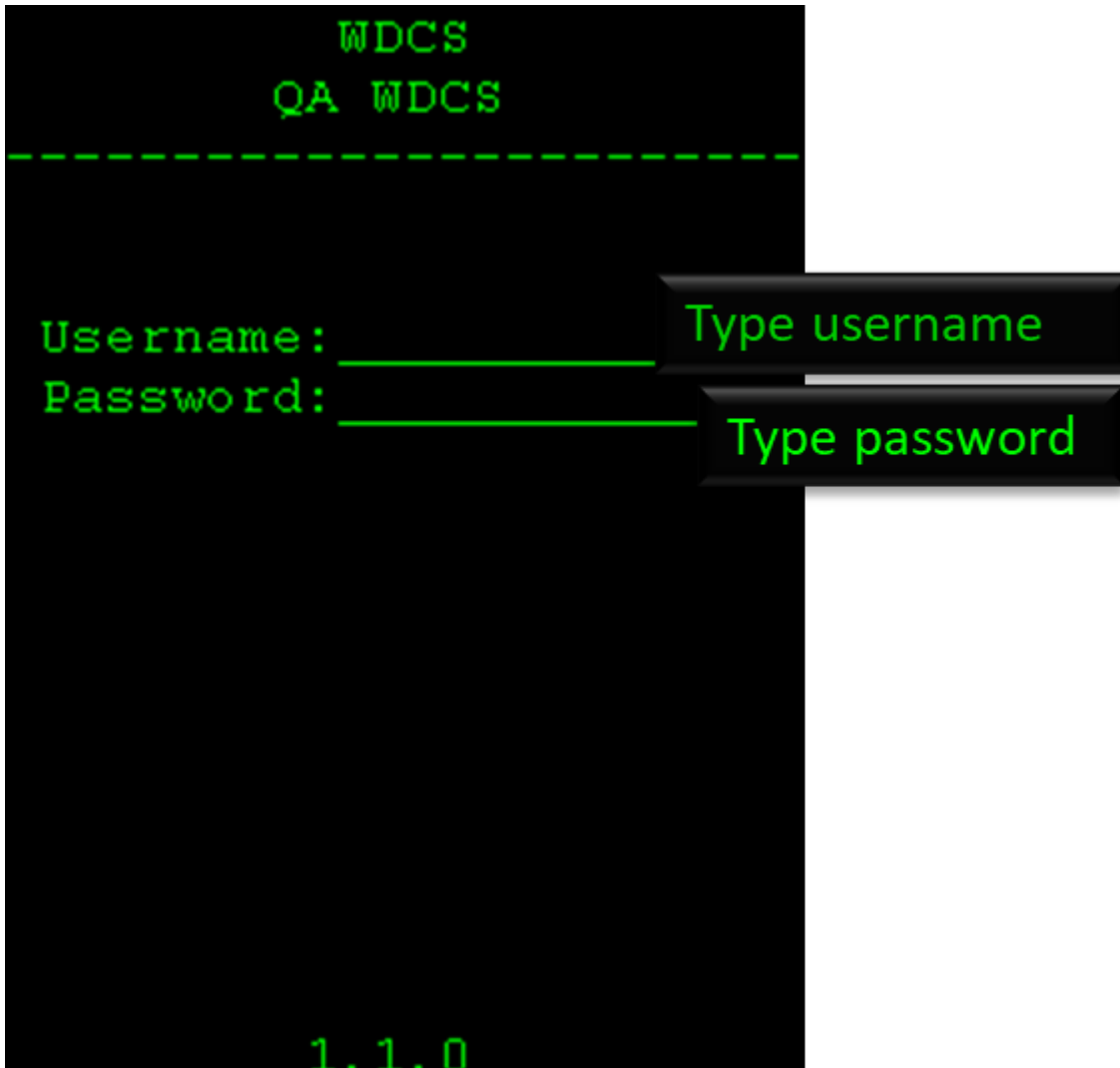
Function Keys: The role of the function keys depends on the screen the user is currently using on the software. For example, some screens might use the F4 function key to exit, while others might use F3 to go back.

Navigation Buttons: The navigation buttons are used to explore the available options on the software.

Enter Button: The enter button is used to confirm the entry of information or to choose options.

2.2 Login screen

Once connected to the server emulation console the user will be prompted with a login screen. The user should enter the username and password assigned by the system administrator in order to login. The system accepts as many users as needed, but the username must be unique within the same warehouse.



2.3 Warehouse Select

After successfully logging in the user will be prompted to select the warehouse they will work at. After the user chooses the warehouse they will be greeted by the Main Menu

```
      Select Warehouse
WH  _____
-----
30      STORE
01      ALMACEN
```

2.4 Main Menu

The main menu screen shows the primary functionality of the system. Access to each area can be enabled or disabled by changing the user/group settings on the web administration interface. To access any of the options showed on the Main Menu just navigate to the option and click Enter.

```
      WDCS WH: 30
OPT:
-----
1. <Receiving>
2. <Picking>
3. Transfer
4. <Inventory>
```

Each part of the main menu will be further explained in the upcoming sections.

2.5 Receiving Transaction

Receiving is the process of acquiring merchandise into the warehouse based on a Purchase Order or Work Order. The Receiving menu is sub-divided in several sub options: Receiving , Put Away and Receiving Adjustment .

```
Receiving wh: 30
OPT:
-----
1. Receive
2. Put Away
3. Receiving Adjustment
```

Receiving Menu Options:

- Receive : Receive products from third parties against a purchase order.
- Put Away : Move cases from a staging location to a regular warehouse location.
- Receive Adjustment : Adjust the total of boxes received in an open receiving. Used to correct errors while receiving.

Receive

Receive Order is the process of adding cases to the inventory coming from outsources. The receiving process is done against a Purchase Order and will increment the inventory. While receiving, the operator has the ability to palletize the cases that are being received. Received boxes are placed in a Location considered to be a staging location. This location is specified by the operator when starting this transaction. If the warehouse has only one staging location it will be used by the system by default.

```

      PO: 418
Line: _____
-----
# Qty  UomItem  Desc
0 0/50 EA A00001 J.B. Of
1 1/50 EA A00002 J.B. Of

```

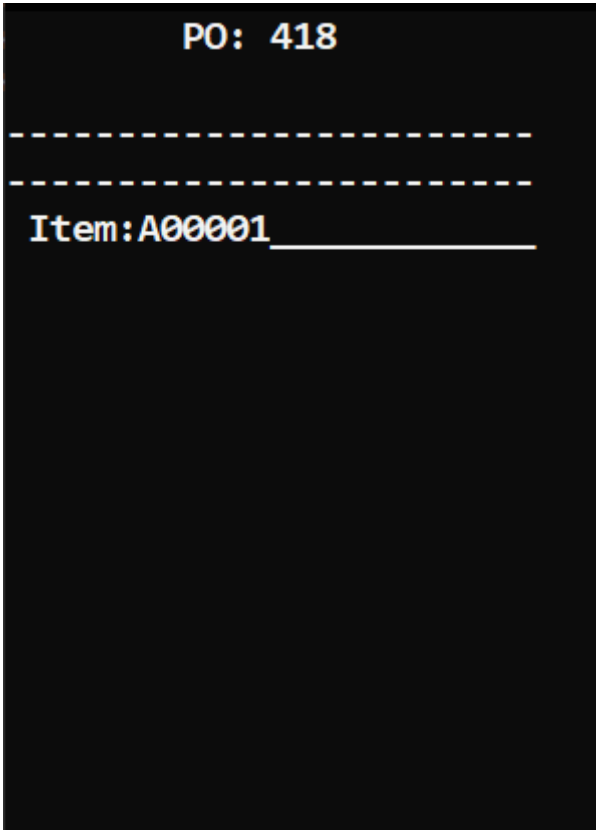
The user may receive by line number.

```

      PO: 418
      A00002: 1/50 EA
      J.B. Officeprint 1111
-----
EA:1
Serial:11122233_____

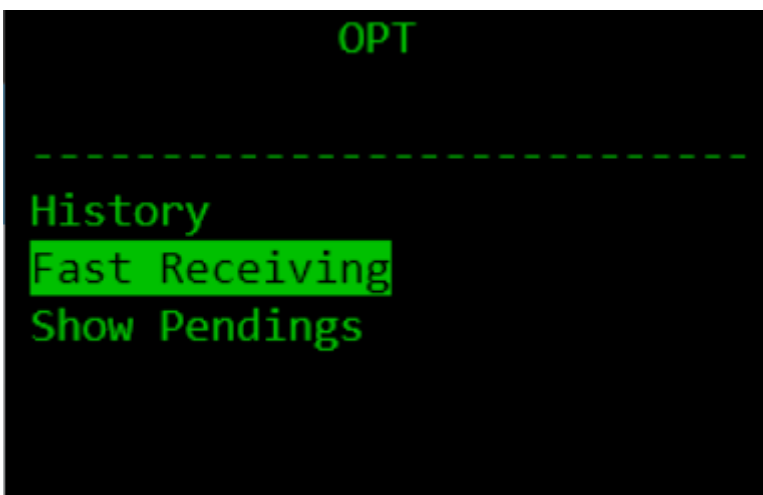
```

or by pressing enter on Line and then scanning or entering a valid item id from the order.



Fast Receiving.

To be able to do a fast receiving press F6 OPT , then select Fast Receiving and Scan or enter a valid item id from the order.



Receiving Adjustment

The Receive Adjustment transaction is used to correct any errors while receiving a Purchase Order. Only open receiving can be adjusted. Items to be removed from the receiving must still reside on its original received location, an item that has been moved into a regular location can not be removed via a receiving adjustment. Receivings that have been already closed can not be edited. It is recommended that only administrative personal are allowed to adjust a receiving. This transaction decreases inventory levels.

To get to the receiving adjustments screen press F6 OPT , then go to History . At the history you will see a list of the received items by line number, item id, quantity and date. Click any of the lines and the screen will show detailed information about the received item, if the user is ready to adjust they can do so by clicking F1 and confirming the adjustment.


```

      PO: 418
Line:1_____
-----
# Qty  UomItem  Desc
0 0/50 EA A00001 J.B. Of
1 1/50 EA A00002 J.B. Of
fingerprint 1111

```

█

F4 Cerrar F6 OPT

Put Away

Put Away is the transfer of already received boxes from a staging location into a warehouse location. It is recommended to put received products from outsources into a staging location (when logistics and environment allow it). Received boxes that are placed into a staging location should be moved into a regular location by the Put Away transaction.

```

      Put Away
-----
Src Loc: _____
      Item: _____

Dest Loc: _____

      Recommendation
Location
Qty

F3 Inventory

```

Put Away Menu Options:

- **Source Location/Pallet/Serial :**
- **Location:** The warehouse location.
- **Pallet:** The Pallet ID where the product is located.
- **Serial:** The Serial Number of the box to be transferred.
- **Destination Location :** Destination for the item that will be transferred.
- **Quantity :** Amount of items that will be moved, used only for non-serialized products.

2.6 Picking Transaction

The Picking is the process of moving boxes from a warehouse location into a staging location and eventually go out of inventory via a shipping process. The selection of merchandise from the warehouse into a staging location can be done by FIFO or LIFO based on the box expiration date.

The Picking sub-menu is sub-divided into several categories: Wave, Orders, and Adjustment.

- Wave : Select products based on multiple orders (a truck trip).
- Orders : Select products based on all open orders.
- Adjustment Adjusts items belonging to a sales order.



2.6.1 Wave

A Wave may be used to summarize several orders into one transaction. A Wave is pre-determined based on a specific criterion. Regularly a Wave comprises all the orders that a specific truck may be delivering in the next trip. Since the movement of boxes for a Wave might be considerably big, this transaction is intended to be completed by the forklift driver. The user will be moving entire pallets from the warehouse into a staging location. When the Picking order process starts, the system will recommend to the user first the products staged by the Wave for fast movement. The Wave Order process does not affect the inventory levels of a product.

2.6.2 Picking Orders

The Picking Order process is the selection of boxes into a staging location based on the amount of products required to satisfy a specific sales order. The WDCS recommends what cases/pallets should be selected. The recommended cases will depend if the sales order is from a FIFO or LIFO customer. The Picking process does not affect the inventory levels of a product.

When a user clicks `Orders` if enabled they will see the Picking Trips screen. When orders are grouped by trips the user may click a specific trip in order to view all orders associated to that trip. In case the user wants to see all orders regardless of the trip they can press enter on the `Trip` input (empty) on the top of the screen.

Trips		
Trip: _____		

Trip	SO	Progress
RUTA1	6	0/14
RUTA2	4	0/8
RUTA3	5	0/14
SUR	1	0/21

F3 Pickup

After selecting the trip (or leaving it empty), the user will see the open and in use orders of the warehouse.

```

Picking 1/2
SO: _____

-----
SO  Sta  Id
389 Open 000001 ABREU ES
390 Open 000002 ABREVALC
391 Open 000003 ADAMES
392 Open 000004 ARS UNIV
393 Open 000005 ARS
394 Open 000006 JICA REP
396 Open 000007 AGENCIA
398 Open 000008 AIC DOMI
399 Open 000009 ALBO S.R
405 Open 000010 ALDEAS I
407 Open 000011 CENTRO M
F1 Next
F4 Close

```

- SO : Sales order id.
- Sta : Status.
- Id : Customer id.
- Customer name.

Info

If you highlight a line from the picking order the complete customer name will be shown.

```
389 - ABREU ESPINAL S. A.  
Line:____  
-----  
# Qty UomItem Desc  
0 0/2 EA A00001 J.B. Off
```

After selecting a picking order the first thing you will see is the order details. The details will be ordered by line number and we will see useful information such as the line number, picked quantity and the ordered quantity, uom of the item, item id and the item description.

Info

If you highlight a line from the picking detail the complete item description will be shown.

Picking an order

The user will be able to pick an order in two ways, by system recommendation or by line number.

BY LINE NUMBER

To pick by line number simply highlight any line number and press enter, after pressing enter you will see the picking line detail which will have information about that specific line number such as the ordered quantity, item description, uom and if any a recommendation of the warehouse location to pick the selected line number from.

```
Picking
-----
Location: _____
Item: _____

Recommendation
Item:C00009
Desc:Chicken by LB
Location:L10
Qty:1 EA

F4 Path
```

BY RECOMMENDATION

When picking by recommendation press enter when the line input on the upper part of the screen is empty (don't select a line number). The system will show the recommendation based on location priorities and will skip any items that do not have inventory on the warehouse.

Picking

Location: _____
Item: _____

Recommendation
Item: I00008
Desc: Rainbow Nuance Ink 6-Pack and Photo Paper Kit
Location: L4
Lot: HELAPAN1
Qty: 2 EA

F1 Next
F4 Path

To pick the item scan or enter the location id, scan or enter the item id and enter the ordered quantity or quantity available on the warehouse. After entering the quantity to pick the system will show the next recommendation.

Info

If the item uses serial number the user will be able to scan or enter the serial id and the item information will be automatically populated.

If the item uses lot the user will be prompted to enter a valid lot id from inventory.

PATH

When using a Path the system will recommend the user the most efficient way to navigate the warehouse. Users are able to select their desire path by Pressing F4 in the bottom left corner of picking screen. Then select your path and click Enter.

Picking		Path 1/2	
Location:		Row:1	
Pallet:			
Item:A00002			
Recommendation			
Location:L001			
Lot:256			
Qty:1 CASE			
F4 Path	F5 Fast Pick		
			F1 Next

	Path	Directio
1	STE	Main
2	909	Main
3	P&P	Main
4	2	Main
5	2	Main
6	4	Main
7	44554	Main
8	5	Main
9	56	Main
10	6	Main
11	6t67	Main
12	7878	Main

2.6.3 Picking Adjustment

The Picking Adjustment is the process of adjusting an item belonging to a sales order, when being adjusted the item is returned to the original inventory location from where it was picked in the first place.

To adjust a line number press F6, click History and select the desired line number to adjust.

Adjustment

Order:392
Line:1
Item:I00008
Desc:Rainbow Nuance Ink 6-Pack and Photo Paper Kit
Qty:2 EA
From:S1
To:L4
Lot:HELAPAN1
Date:4:22 PM 07/07/2021
User:adda

F1 Yes F2 No

Then press F1 to confirm the adjustment.

2.7 Inventory Transfer

The Inventory transfer is used to move pallets or boxes from one location to another. Every transfer of boxes from one location to another should be done using the Inventory Transfer to keep track of where the cases are located on the warehouse. The Inventory Transfer transaction does not affect the amount of items on the Inventory, it just changes the location of the cases or/and pallets.

- Source Location :
- Main input, scan or type in one of the following:
- Location: Location ID where the product is located.
- Pallet: The Pallet ID that will be transferred.
- Serial: The Serial Number of the box to be transferred.
- Destination Warehouse : The Warehouse the user wants to deliver to.
- Destination Location : Destination location for the pallet or boxes that will be transferred.

```
Transfer
-----
Src WH:30 _____
Src Loc: _____
Item: _____

Dest Wh:30 _____
Dest Loc: _____

F3 Inventory
```

2.8 Inventory

The Inventory area comprises the transactions used to inspect and adjust the level of products in inventory. The transactions included in the inventory area are: Inquiry Add Remove Returns RMA Count Replenishment and Tracking . Each transaction is described below

```

Inventory: MAIN
OPT:
-----
1. Inquiry
2. Add
3. Remove
4. Returns
5. Rma
6. Count
7. Replenishment
8. Tracking

```

INQUIRY

Inventory inquiry is one of the more useful and versatile operations available in the WDCS mobile. This module provides a flexible and simple method to view information about quantities and location of items in the warehouse. The Inventory Inquiry does not affect the Inventory of a warehouse, it is only informative.

```

Inventory: MAIN
OPT:1
-----
1. Inquiry
2. Add
3. Remove
4. Returns
5. Rma
6. Count
7. Replenishment
8. Tracking

```

Once select this option, the console will show the next options:

Use any field in this screen in order to perform the item inquiry such is location, pallet, lot, item, description or serial

```

      Inquiry
-----
Location:_____
Pallet:  _____
Lot:     _____
Item: A00001_____
Desc:   _____
Serial:  _____

```

When the information is entered in the console, the next display will appear on the screen:

```

      Inventory 1/5
      A00001
-----
Loc  Pal  Qty  Uom
-----
S1 NA           98  E
L1 NA          502  E
S2 NA           10  E
S1 123456         2  E
S1 CAJA          2  E
S1 1234567898765 2  E

F1 Next

```

Use the arrow keys in order to navigate on the console screen and select the Location or Pallet.

```

      Inventory 1/5
      A00001
J.B. Officeprint 1420
Loc  Pal  Qty  Uom
-----
S1 NA           98  E
L1 NA          502  E
S2 NA           10  E
S1 123456         2  E
S1 CAJA          2  E
S1 1234567898765 2  E

F1 Next

```

When the data is located, the console will display the information found it.

```

Inventory
-----
Item:A00001
Desc:J.B. Officeprint 1420
Qty:2 EA
Location:S1

```

ADD

Inventory Add is the process of incrementing the inventory level of a particular product. Every increment of items in inventory should have an associated reason selected by the user when executing the transaction. It is recommended to allow inventory adjustments to warehouse administrators or managers as they will have the power to adjust increase or reduce the inventory level of items. Inventory adjustments are used to correct any discrepancy found in inventory or report missing or damaged products.

```

Add
-----

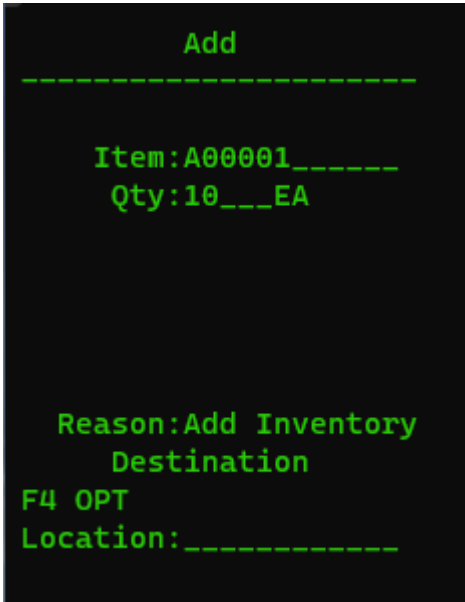
Item:A0001_-----

Reason:Add Inventory
Destination

Location:-----

```

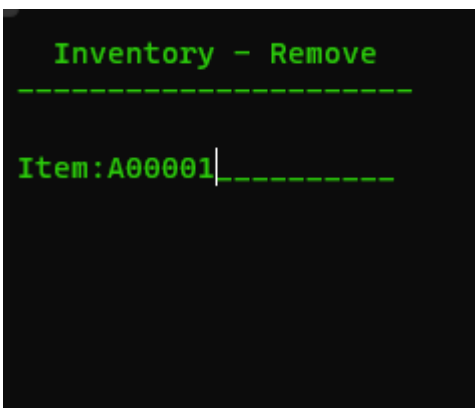
Scan or type the Item number in order to locate the data.



After selecting the item ID and a reason code for the inventory and the quantity to be added; the location ID must be selected. If the item has multiple unit of measures then the user can select a unit of measure for the inventory add. Optionally if the item uses serial, lot and expiration date the fields to add display information will be provided. After providing the requires information the inventory level of an item is increased.

REMOVE

Inventory remove is the process of reduce the inventory level of a particular product. Every reduce of items in inventory should have an associated reason selected by the user when executing the transaction. It is recommended to allow inventory adjustments to warehouse administrators or managers as they will have the power to adjust increase or reduce the inventory level of items. Inventory adjustments are used to correct any discrepancy found in inventory or report missing or damaged products.



The same rules apply to remove the Items from our inventory, once we scan the Item ID the system will prompt the Quantity to be deducted; the location and the reason code to be used. Optionally if the item uses serial, lot and expiration date the fields to remove display information will be provided. After providing the requires information the inventory level of an item is reduced.

```

Inventory - Remove
-----
Item:A00001_____
Qty:_____ EA
Location:_____
      - Reason-
:Cycle Count Inventory Remove

F4 OPT

```

```

Inventory - Remove
-----
Item:A00002_____
Serial:_____
Pallet:_____
Location:_____
      - Reason-
:Cycle Count Inventory Remove

```

RETURNS

When a return is requested by a customer, the system has the ability of increase the inventory based in the sales order in full or partial returns.

```

Shipment SO 1/0
SO:_____
no record found

```

RMA

RMA stands for "Return Merchandise Authorization." It's a system used by companies to authorize and manage the return of products purchased by customers. An RMA system allows a company to track a product return more effectively, providing a means to ensure the customer's account is credited properly. The RMA number is usually issued by the company where the original purchase was made and serves as a reference for tracking the return process. It is also used to ensure the returned item is the correct one and was indeed sold by the company. The RMA process can be initiated for various reasons, such as product defects, customer dissatisfaction, or the

product simply not meeting the customer's needs. However, each company may have its own specific RMA policy, including its terms and conditions, which customers need to comply with. Optionally if the item uses serial, lot and expiration date the fields to add display information will be provided.

```

      Rma Receive
SO: _____
-----
SO      Sta      Ref
390    Open    10102

F4 Close

```

COUNT

A Cycle Count is issued by a system administrator as a request to count the amount of boxes of a product in the warehouse. The Cycle Count is done for a specific product and the product is specified by the system administrator when creating the Cycle Count request. The warehouse floor personnel will proceed to search the warehouse for a certain product and record the quantity found for that product. The Cycle Count is intended to have an estimate of the quantity of boxes available for that specific product.

Select the Cycle count created by the system administrator in order to begin the process

```

      Cnt
Id:A00001_____
-----
Id  Desc
89 RetailStore Loc 1
87 supermaxx
80 ferretera
79 High Movers
67 A00001_COUNT_TEST
62 Conteol

```

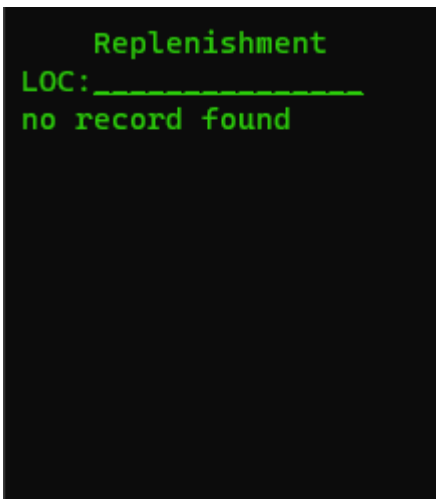
Once selected the information of the item is displayed



Type the quantity to be counted and press F1 to move to the next item to be counted.

REPLENISHMENT

This process involves restocking picking locations from other location areas to ensure that there are enough goods available for the picking team to meet customer sales orders.



Tracking

In the Inventory Tracking screen, display the history of the products in the system. This shows other information, such as quantity, date of the transaction, type of transaction, number of products, weight, from-to locations, user.

Tracking Overview

Inventory Adjustment
Item:A00001
J.B. Officeprint 1420
Qty:19 EA
Date:07/26/2023-07/26/2023

F1 Next
F3 Details

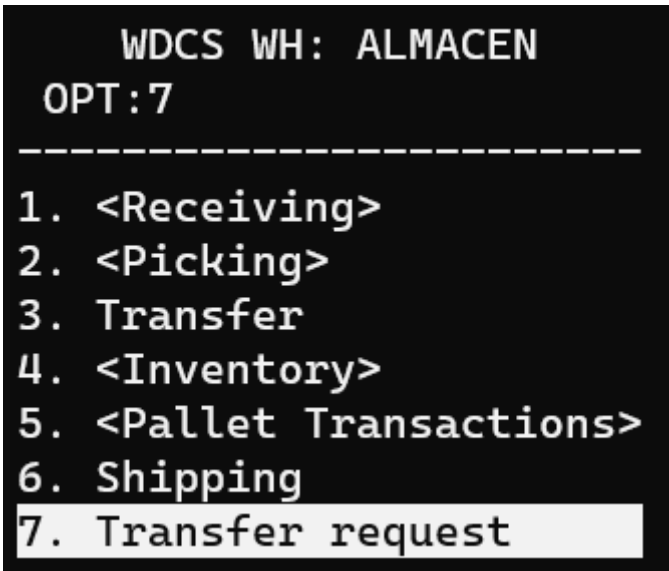
Tracking Details

Inventory Adjustment
Item:A00001
J.B. Officeprint 1420
From:L1
To:W2
Qty:-1 EA
User:adda
Date:07/26/2023 02:55 PM

F1 Next

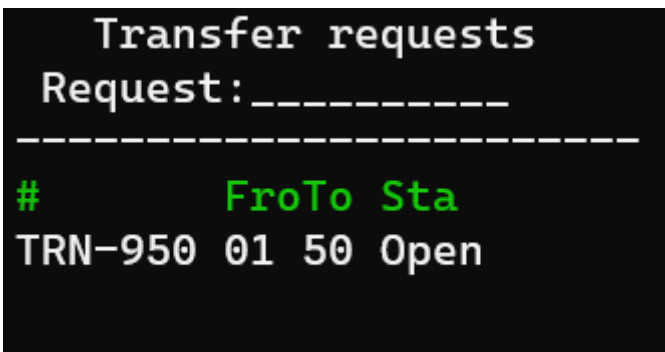
2.9 Inter warehouse transfer

An inter warehouse transfer transaction is used to transfer inventory between warehouses, both the source warehouse and the destination warehouse must have the item in order to be able to transfer the inventory. Inventory will be reduced from the source warehouse and the destination warehouse inventory will be increased at the specified location.



At the Inter Warehouse Transfers screen the user will be able to view a list of the Open, In-transit, In-receiving and In-picking transactions.

The list contains the following fields: #: Transfer request number. From: Source warehouse id. To: Destination warehouse id. Status: Request status.



After selecting a transfer request the user will be able to view all the line items of the request. To begin picking the inventory in order to send it to the destination warehouse the user has to select the line item.

```
Details - TRN-950
Line:_____
-----
Item   Pick Conf
A00002 0/23 0/0 EACH J.B

F6 OPT
```

After selecting the line item the user will have to enter the required information for the item in order to pick it from the desired location.

```

Request: TRN-953
A00001: 22/22 EACH
J.B. Officeprint 1420
-----
Location:L001_____
Item:A00001_____

Qty:22_____
Recommendation
Location:L001
Item:A00001

Qty:22 EACH

```

After finishing the picking process the user can change the request status to `In-transit` in order for the destination warehouse to be able to confirm the inventory picked.

In order to do this the user has to click `F6` and select `In transit`.

```

OPT
-----
In transit
Completed

```

```

Change Transfer request TRN-953 to in transit?
-----
Yes
No

```

After changing the request status:

```
Transfer requests
Request:TRN-953___
-----
#      FroTo Sta
TRN-950 01 50 Open
TRN-953 01 50 In transit
```

View how to confirm inventory on the web page

3. Web

3.1 Web interface

3.1.1 Overview

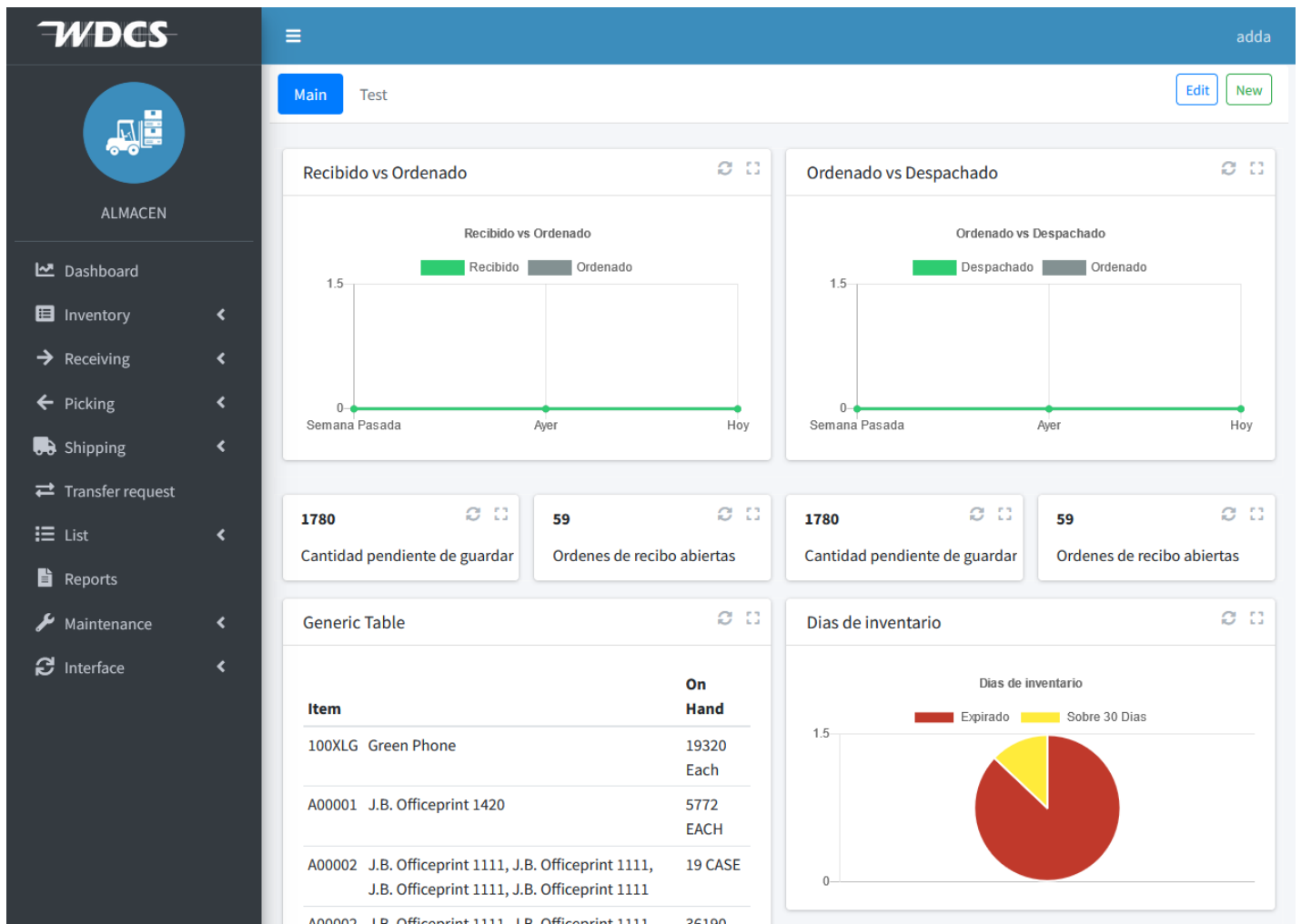
The Web-based administration interface provides system configuration/administration through reporting. To access this application the client PC must have pre-installed a web-browser.

This overview assumes the user has logged in.

Info

Please see the Web Login for further details.

The Dashboard screen shows the main options available on the system.



Take notice of the left menu on the application. The left menu is the main entry point for most areas of the application. Click on each of the options and look for the dropdown submenu that is shown.

3.2 Login

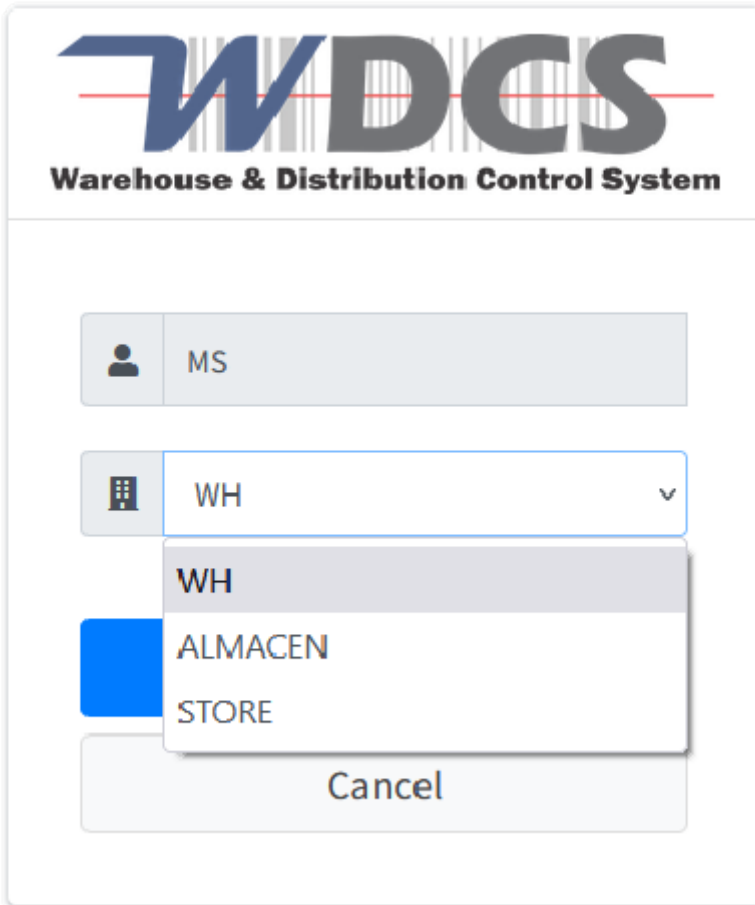
3.2.1 Login Page

When we access the Web-based user interface we'll be greeted by a login page where the user will be able to access the interface using a username and password. It is recommended to have a different username/password for each person using the system.

The username must be unique within the same warehouse.

The image shows a screenshot of the WDCS (Warehouse & Distribution Control System) login page. At the top, the logo features the letters 'WDCS' in a large, bold, blue font with a red horizontal line through the middle. Below the logo, the text 'Warehouse & Distribution Control System' is written in a smaller, black font. The login form consists of three main elements: a 'Username' input field with a person icon, a 'Password' input field with a lock icon, and a blue 'Login' button. Three blue callout boxes with lines pointing to the respective fields contain the instructions: 'Type username' for the username field, 'Type password' for the password field, and 'Click login' for the login button.

After providing the login credentials the user can choose between the warehouses they are working at.



The screenshot shows the login interface for the Warehouse & Distribution Control System (WDCS). At the top, the logo features the letters 'WDCS' in a stylized font with a barcode-like pattern, and the full name 'Warehouse & Distribution Control System' below it. The login form consists of three main input fields: a user ID field containing 'MS', a warehouse selection dropdown menu currently showing 'WH', and a 'Cancel' button. The dropdown menu is open, displaying a list of options: 'WH', 'ALMACEN', and 'STORE'. The 'ALMACEN' option is highlighted with a blue background.

After the user is successfully authenticated and picks the warehouse they will be working at, the system will redirect the user to the Dashboard screen.

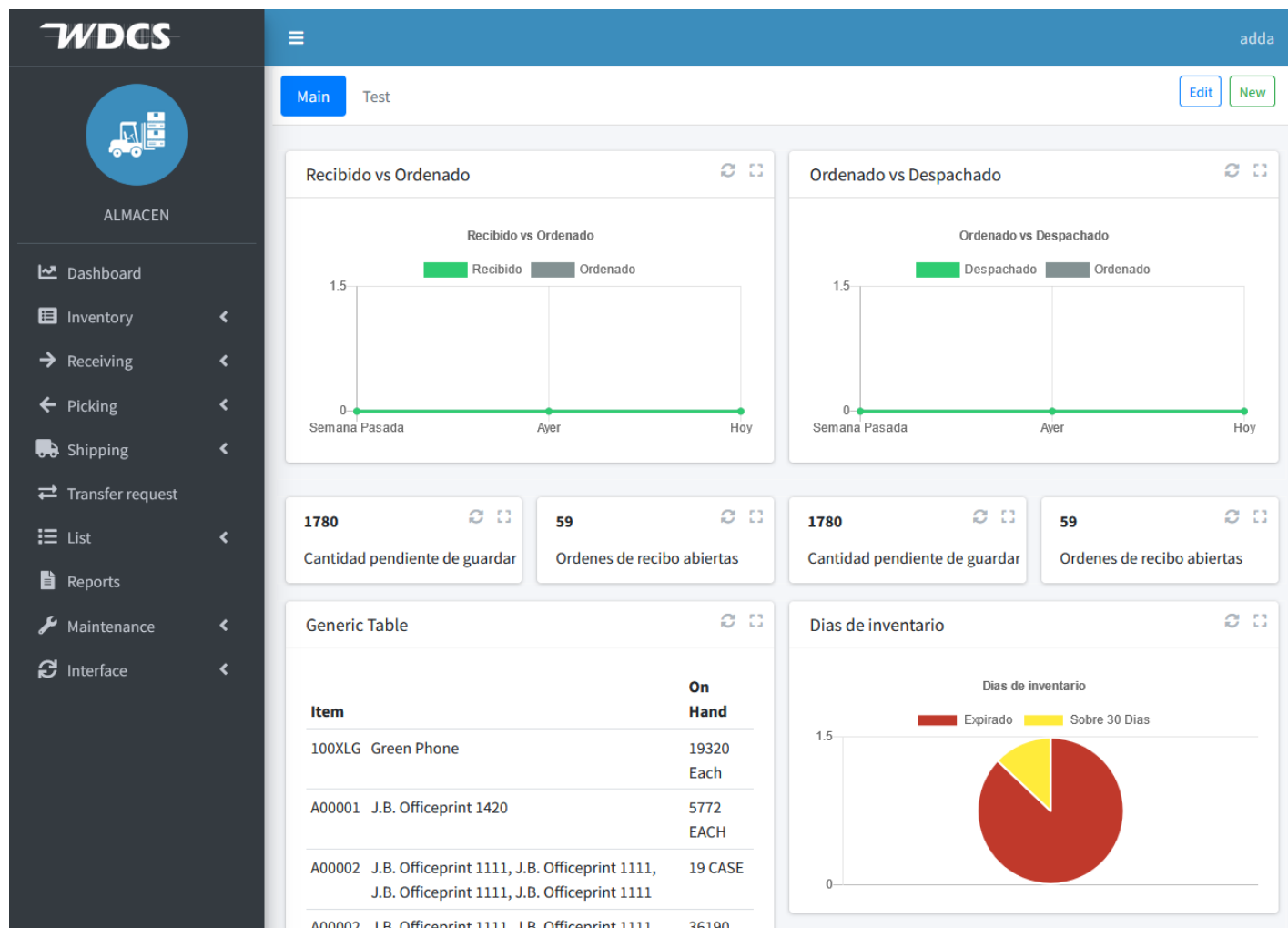
Info

If the user only has access to one warehouse then they will be automatically redirected to the dashboard screen.

3.3 Dashboard

The Dashboard screen is where the user will be able to view a graphical summary of the inventory and orders. The Dashboard is compromised of widgets (tables, charts) chosen and customized by the administrator.

Users can have multiple dashboards configured.

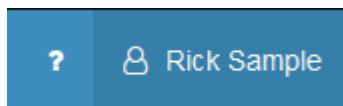


Some of the Dashboard Graphs and information outline options are:

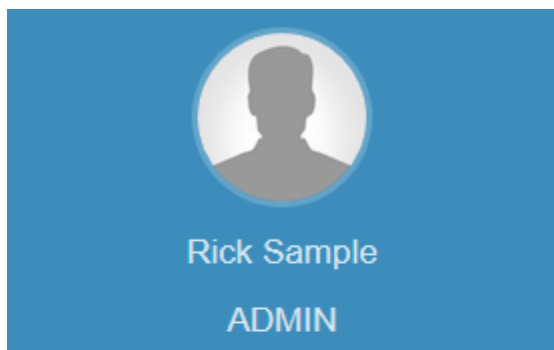
- Quantity of orders waiting to be closed.
- Receipt orders in use.
- Open receipt orders.
- Ordered and Received.
- Expired and Good Inventory.
- Dispatched and Ordered.
- Orders by status.

Top Bar

At the right part of the top bar we can see the username we used to login and besides that we can see a question mark. The question mark is used to directly access the documentation page of the current page the user is in.



When we click on the username it we'll show a drop-down menu with some useful information such as the name of the user, the group the user belongs to and the language the website is using; below that, we have the [Manage Data source and Widget](#) , [Preferences](#) buttons and the [User Manual](#) which will take you to our documentation page.



Language:

English (United States)

[Manage Data source and Widget](#)

[Preferences](#)

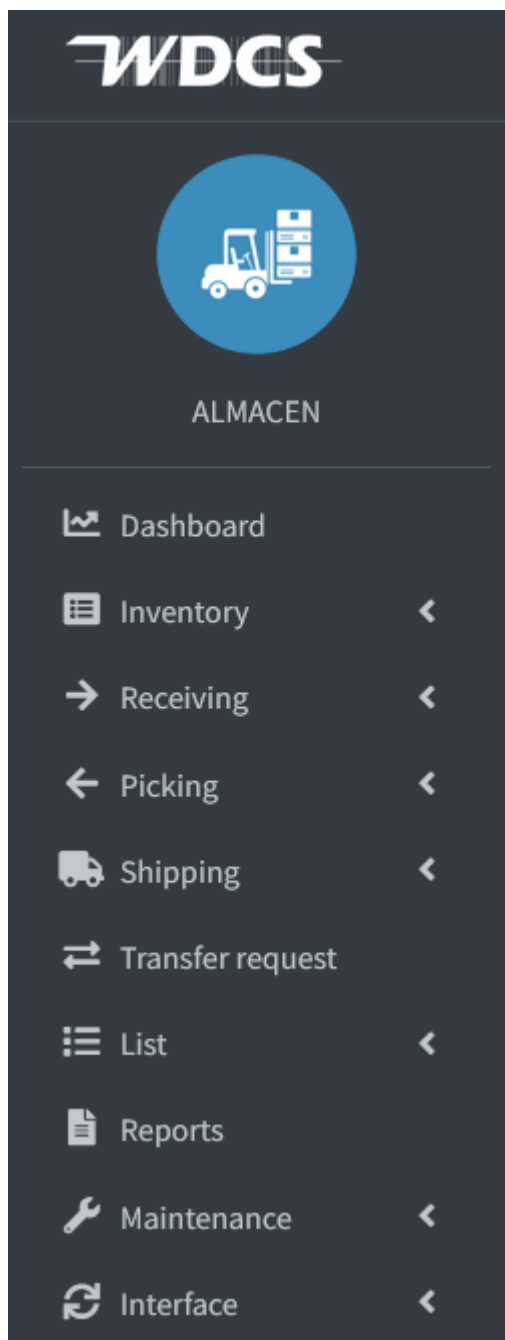
[User Manual](#)

Left Side

On the Left side of the web-interface you will see the different options available.

Info

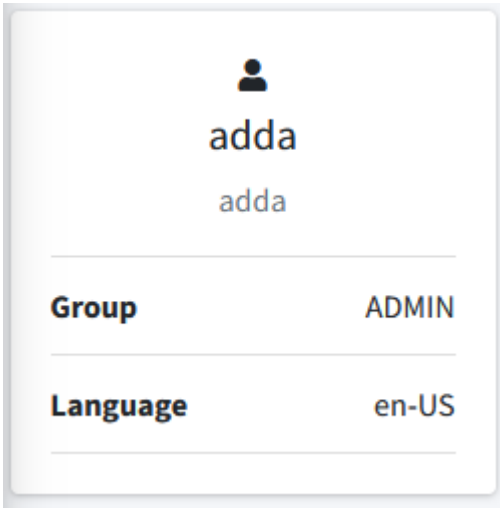
Depending on the group the user belongs to the quantity of items shown on the sidebar will vary.



- Inventory : The Inventory area comprises the transactions used to inspect and adjust the inventory level of products.
- Receiving : The Receiving area comprises the transactions about the process of acquiring merchandise into the warehouse based on a Purchase Order or Work Order.
- Picking : The Picking area comprises the transactions about the process of moving boxes from a warehouse location into a staging location that eventually will go out of inventory via a shipping process.
- Shipping : Contains the overall information about the Shipping process.
- Reports : In this page you can view the reports and filter them by category or name.
- Vendors : Contains information about the vendors stored in the system.
- Customers : Contains information about the warehouse customers.
- Maintenance : The maintenance menu contains system configurations.
- Interface : The interface menu is used by system administrators manage the interface working between WDCS and the erp.

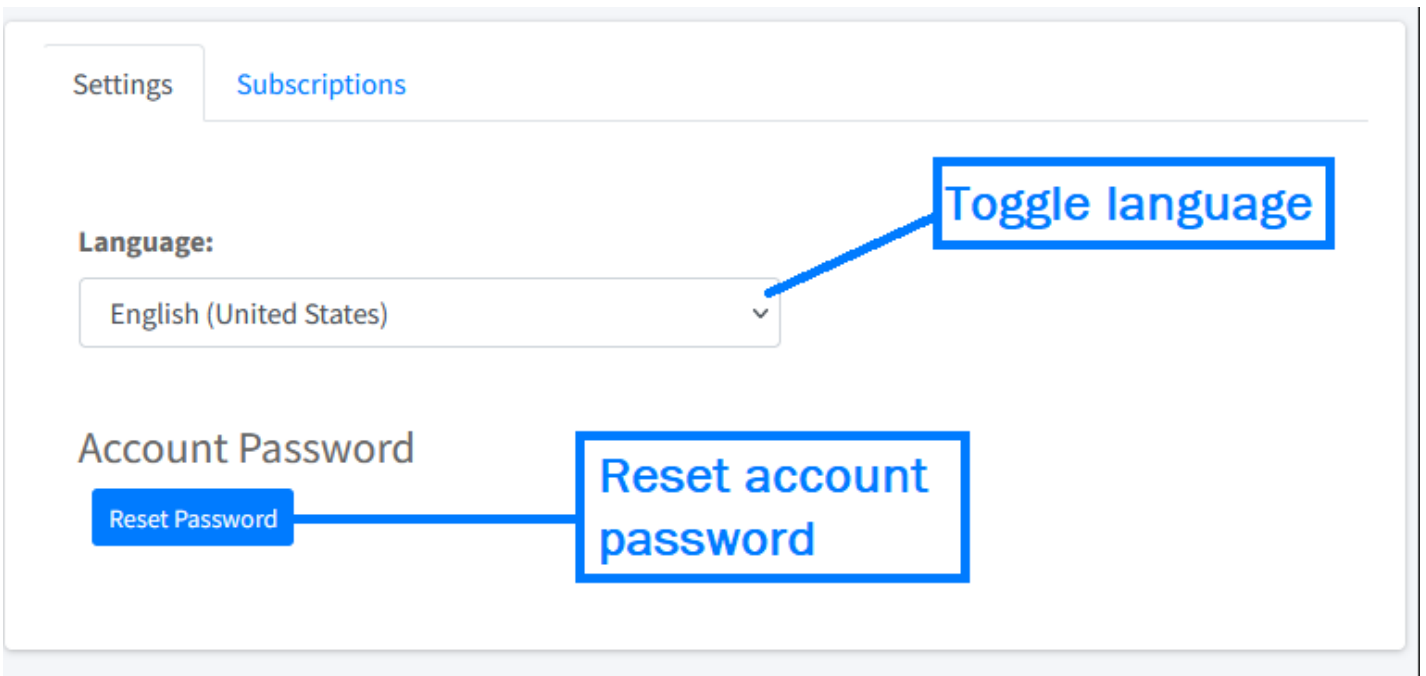
3.4 Preferences

The preferences screen is where the user will be able change information or preferences about their account. The top part of the screen shows the Name of the user, their UserID, their preferred language, and the Group the user belongs to.



A user profile card with a white background and a light gray border. At the top is a person icon, followed by the name 'adda' in bold and 'adda' below it. A horizontal line separates this from the 'Group' field, which shows 'ADMIN'. Another horizontal line separates it from the 'Language' field, which shows 'en-US'.


Below this the system language options are shown. If the user toggles the language option the entire website will change to the user's preferred language. the user can reset their password clicking the Reset password button.







A settings page with a white background and a light gray border. At the top are two tabs: 'Settings' and 'Subscriptions'. Below the tabs is the 'Language:' section, which contains a dropdown menu showing 'English (United States)'. A blue box labeled 'Toggle language' has an arrow pointing to the dropdown arrow. Below this is the 'Account Password' section, which contains a blue button labeled 'Reset Password'. A blue box labeled 'Reset account password' has an arrow pointing to the 'Reset Password' button.

RESET PASSWORD

In the Reset Password screen the user will be able to change the current password of their account. To do so they have to enter the last password they used to access their account followed by the new password desired.



Reset Password

<input type="text" value="adda"/>	
<input type="password"/>	
<input type="password"/>	
<input type="password"/>	

[Reset Password](#)

3.5 Security

The WDCS provides the flexibility to adapt to most standard warehouse operations and needs. The flexibility of the system is provided by enabling and disabling several areas or restrictions on the system. Most of these settings can be configured by using the Maintenance screen. Each setting has a written description of what it is for in the section below, which will ease the configuration process. The user access groups and users tabs can be found in the Maintenance tab, Please visit Maintenance for more information.

Note

The available options on this screen might vary depending on the user rights.

3.5.1 User Access Groups

The screenshot shows the 'User Access Groups' interface. At the top right, there is a breadcrumb 'Home > User Access Groups'. Below the title, there are search filters: 'Search By Name' (with a dropdown for 'Group') and 'Search by Description' (with a dropdown for 'Description'). An 'Options' dropdown is also present. The main area contains a table with the following data:

Name	Description	
Test	Test Test Test	Edit
FORKLIFT	FORKLIFT PERSONEL	Edit
ADMIN	ADMIN	Edit

At the bottom right of the table area, it says 'Pages: 1 / 1' and 'Total records: 3'. A blue circular button with a white plus sign is located at the bottom right corner of the screen.

A group can have one or multiple users and a group is used to assign the rights where a set of users can get into. On this screen the user will be able to view the permissions each groups has by clicking the Edit button on the right corner or by clicking the username.

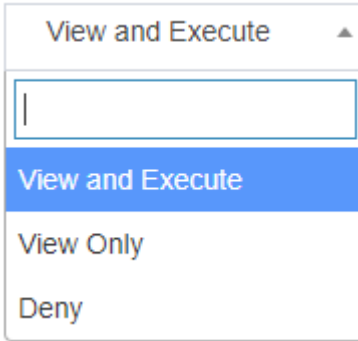
User Access Group Permissions

After being redirected to this screen the user will be able to view all the information and permissions associated to a specific group, Such as the Group Name and Description .

The screenshot shows the 'Edit User Access Groups' screen for the 'ADMIN' group. The breadcrumb is 'Home > User Access Groups > Edit'. Under the 'Information' section, there are two input fields: 'Group Name' with the value 'ADMIN' and 'Description' with the value 'ADMIN'. Below this, the 'Permission' section is titled 'Access granted to users that are assigned to this group.' It lists three permissions, each with a 'View and Execute' dropdown menu:

- Inventory Adjustments**: Allow executing the inventory remove and inventory add transactions (mobile).
- Cycle Count**: Allows executing the cycle count of the inventory in the warehouse.
- Put Away**

The available permissions are:



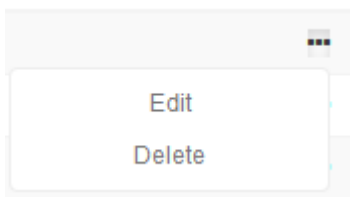
3.5.2 Users

On the Users screen, users are created in the system. A user exists only in the active warehouse. If a user is needed in two different warehouses the user must be created for each warehouse independently. Each user must be assigned to a group.

The fields at the users screen are as follows.

Field Name	Usage
Name	Displays the name of the user
UserID	Displays the ID of the User
Group	Displays the Group the user belongs to
Status	Displays the status of the user account
Active	If this option is highlighted, the user account is active on the system
Web	If this option is highlighted, the user has access to the web interface
Mobile	If this option is highlighted, the user has access to the emulation interface
Last Login	Displays the last time the user account logged in

By clicking the three dots at the right side of any user account and clicking **Edit** the user will be able to edit the selected user account.



Edit Users

In the Edit Users screen you will be able to edit the already created user accounts. The user will be able to permit or deny access to **Web** or **Mobile**, change the **Warehouse** and give **WIP** access, as well as change the **Group** a user belongs to.

User Edit User Home > Users > Edit

Information

Username	<input type="text" value="pilon"/>	Name	<input type="text" value="Pilon"/>
Language	<input type="text" value="English"/>	Group	<input type="text" value="ADMIN"/>
Status	<input type="text" value="Active"/>	Access	<input type="text" value="x Web x Mobile"/>
Warehouse	<input type="text" value="x ALMACEN"/>	<input type="checkbox"/> Reset Password	<input type="text"/>

3.6 Inventory Search

3.6.1 Overview

The inventory search screen shows the different fields the user has available to search the inventory for a specific box, product, pallet, lot or serial number (the visible fields will vary depending on the warehouse product requirements). The total of products shown on the Inventory Search is the physical amount of products in the location/pallet.

The screenshot shows the 'Inventory Search' interface. At the top, there's a breadcrumb 'Home / Inventory Search' and a page number '15'. Below the header, there are search filters: 'Options' and a dropdown for '15'. The main table has columns: Warehouse Id, Item, Description, Location Id, Pallet Id, Serial Id, Lot Id, Quantity, Weight, Exp Date, and Status. The table contains 10 rows of data. The 'Location Id' and 'Pallet Id' columns in the first two rows are highlighted in light blue, indicating they are active filters.

Warehouse Id	Item	Description	Location Id	Pallet Id	Serial Id	Lot Id	Quantity	Weight	Exp Date	Status
ALMACEN	100XLG	Green Phone	L3				1651024 Each	0.00 LBS	10/20/2020	Available
ALMACEN	100XLG	Green Phone	L001				13824 Each	0.00 LBS	02/12/2021	Available
ALMACEN	A00001	J.B. Officeprint 1420	L4				1508 EACH	0.00 LBS	03/10/2021	Available
ALMACEN	A00001	J.B. Officeprint 1420	L3				1475 EACH	0.00 LBS	03/10/2021	Available
ALMACEN	A00001	J.B. Officeprint 1420	S1				1605 EACH	0.00 LBS	03/16/2021	Available
ALMACEN	A00001	J.B. Officeprint 1420	S1	T491			105 EACH	0.00 LBS	03/16/2021	Picked
ALMACEN	A00001	J.B. Officeprint 1420	S1	T493			4 EACH	0.00 LBS	03/16/2021	Picked
ALMACEN	A00002	J.B. Officeprint 1111	S1	T491		124	90 EACH	0.00 LBS	02/13/2021	Picked
ALMACEN	C00005	WLAN Card	R1			L001	553 EACH	0.00 LBS	03/25/2030	Available

The user can click on the fields highlighted with light blue and they will be automatically filtered based on the data clicked. After being filtered, the matching data will be the only data shown.

Available Fields

In the Inventory Search screen the user will be able to view data from various fields as shown in the picture of the top overview.

Field Name	Usage
Warehouse	The warehouse the inventory belongs to
Item	Shows the name of the items on the inventory
Description	Shows the item description for the available inventory
Location	Shows the delimited space in a warehouse used to store goods
Pallet	Shows the pallet number used to store items in the warehouse
Serial	Shows the serial number used to identify goods in the warehouse.
Lot	Contains the lot number for the items.
Age in days	If the product requires lot then the age in days is the difference between the production date and the current date.
Quantity	Shows the accurate quantity of items stored in the inventory.
Weight	Shows the weight of the item stored.
Expiration Date	Show expiration date for products that require lot
Status	Shows the inventory status. The available status are Picked (when an item has a status of picked this means the inventory belongs to the picking history of a picking order) and Available (when inventory is available this means it does not belong to a picking order.)

ITEM SUMMARY

If the user clicks the item field a summary of the available quantity for said item will open. The quantity will be grouped by the inventory status available and picked.

Summary x

Item

Item: A1-103/0 Fluorescent Desk Lamp Small View Detail

Status: Available **Status:** Picked

Quantity: 3549823 Ea. **Quantity:** 160372 Ea.

Weight: 1.5 lbs. **Weight:** 0 lbs.

LOCATION SUMMARY

If the user clicks the location field a summary of the available quantity for said location will open. The quantity will be grouped by the inventory status available and picked.

Summary ✕

Location

Location: L001 My first regular location View Detail

Status: Available	Status: Available
Quantity: 212 Ea.	Quantity: 18175 Each
Weight: 2.5 lbs.	Weight: 28 LBS

PALLET SUMMARY

If the user clicks the pallet field a summary of the available quantity for said pallet will open.

If the pallet has products that require lot then information will be shown for the age of each unique lot number available.

Summary ✕

Pallet

Pallet PALLET002 **Lot** BATCH002 **Age** 75 Days

Location L2

Status: Available

Quantity: 288 EACH

Weight: 0 LBS

3.7 Inventory Count

3.7.1 Overview

A Cycle Count is issued as a request to count the amount of a product in the warehouse. The warehouse floor personnel will proceed to search the warehouse for a certain product and record the quantity found for that product. The Cycle Count is intended to have an estimate of the quantity of boxes available for that specific product. The purpose of this transaction is to fix any deviation from what the system virtually has and the real inventory in the warehouse. To perform inventory cycle counting, it's necessary to have precise data on all items coming in and going out of your warehouse.

Inventory Count			Home / Inventory Count
Options ▾			15 ▾
Name	Start Date	Status	
<input type="text" value="Name"/>		<input type="text" value=""/>	
CycleCount1	03/01/2023	Pending	...
A00006-L2-L3	01/16/2023	Finalized	...
A00006-L2-L3	01/16/2023	Closed	...

In the bottom right part of the screen, depending on the group the user belongs to, the user will be able to create a new inventory count by clicking on the +.



Create Inventory Count

Inventory Count		Home / Inventory Count / Create
Create Inventory Count		
Information		
Request	<input type="text" value="49"/>	
Name	<input type="text"/>	
Start Date	<input type="text" value="03/01/2023"/>	<input type="text" value=""/>
Show full pallet quantity on count	<input type="text" value="Inactive"/>	
		<input type="button" value="Cancel"/> <input type="button" value="Create"/>

At the create inventory count screen the user will be able to add information about the cycle count, the information the user will need is:

- Request : Auto-generated number.
- Name : The name of the inventory count (Assigned by the user).
- Start Date : The date the inventory count will be executed.
- Show full pallet quantity on count : If the user wants to show the full pallet quantity on the count that will be created.

After adding the information asked, the user will be prompted to confirm the inventory count.

Inventory Count Details

After confirming the prompt the user will land on the Inventory Count Details page where they will be able to see all the information about the inventory count based on the information provided before. The user can choose the type of count order they want to view: Location or Item, with Location the user will view all the items based on their physical location at the warehouse. Alternatively, if they choose Item they will be able to view all the items by name stored on the warehouse.

Add Detail

Inventory Count: CycleCount1

[Home](#) / [Inventory Count](#) / [Detail](#) / Add

Type

Location ▾

Group

Without filter ▾

Search

Q

Select the location you want to add to the inventory count.

[See what's added to the inventory count](#)

Finish

	<input type="checkbox"/> All
W1 - Wave Location @@@	<input type="checkbox"/>
TXL - Truck XL	<input type="checkbox"/>

ITEM AND LOCATION GROUPS

Instead of manually selecting the location or items for a cycle count we have the option to use pre-created Groups. When we select a group all of the locations or items belonging to that group will be the locations or items to be counted for the cycle count.

Group

To learn how to create groups please view the groups section.


After the user is done viewing the product and locations selected they may click the finish button on the top right part of the screen, the user will be redirected to the details screen where they will be able to activate the count and make it available to be counted.


At this screen the user can edit the locations and items selected for the count. In order to add locations or items click the + button on the bottom right of the screen.


To edit the locations or items click the Edit button and remove the selected value.

Items Locations

Locations belonging to the cycle count

Search  Finish Editing

L001 - My first regular location 

L1 - 1st Location 

Activating the cycle count

In order to activate the cycle count and make it available for the console application users click the **Activate Count** button.

CycleCount1

Details Inventory Count

Start Date: 3/1/2023

Show full pallet quantity on count: **Inactive**

Activate Count

Once the count is activated the screen will be refreshed with the count progress.

Inventory Count Progress

Progress Inventory Count: CycleCount1 [Home](#) / [Inventory Count](#) / [Progress](#)

Start Date: 3/1/2023 Status: **Open**

Show full pallet quantity on count: **Inactive**

Filter By Count Number

1 ▾

Inventory Snapshot

Options ▾ ▾

Item ↕	Unit Of Measure	Initial	On hand	Counted ↕	Difference ↕
<input type="text" value="Item"/>					
A00002 J.B. Officeprint 1111	CASE	19	19	0	-19
A1-103/0 Fluorescent Desk Lamp Small	Ea.	2828904	2828904	0	-2828904
A1-105/0 13W Mini Fluorescent Bulb	Ea.	185	185	0	-185

The Inventory Count Progress shows in-depth information about the items stored in the system and the progress of said items in the current cycle count.

Field Name	Usage
Item	Item ID, item description
Unit of Measure	Product unit of measure
Initial	Snapshot of the quantity of the item at inventory at the time the cycle count was created
On hand	Current product quantity
Counted	Quantity of the item the warehouse operator found at the warehouse
Difference	The difference between the item quantity found at the warehouse and the item quantity stored in the system (On hand quantity)

INVENTORY SNAPSHOT BUTTON

The Inventory Snapshot button is used to take the current inventory on hand quantity and replace the initial cycle count quantity with it. This means for example that if the user created the cycle count a week ago and the product quantity changed from the initial quantity, the user can click the Inventory Snapshot button replace the Initial quantity with the current On hand quantity.

DIFFERENT PROGRESS RESULTS

When both the Counted and Difference bars are completely green that means the product quantity counted was the same as the On hand quantity and the warehouse.

Item	Unit Of Measure	Initial	On hand	Counted	Difference
<input type="text" value="Item"/>					
#12 INDOOR 12 GAUGE INDOOR WIRE	EACH	23	23	23	0

When both the Counted and Difference quantities are different, then progress results will show the difference in quantity and counted quantity.

A00006 Rainbow 1200 Laser Series	EACH	2400	2400	720	-1680
-------------------------------------	------	------	------	-----	-------

Item without quantity counted:

A1-320/0 50W/12V Halogen Bulb	Ea.	132	132	0	-132
----------------------------------	-----	-----	-----	---	------

After counting

If the user refreshes the screen after items have begun to be counted then new options will be shown:

Progress Inventory Count: A00006-L2-L3 [Home](#) / [Inventory Count](#) / [Progress](#)

Start Date: 1/16/2023 Status: **Finalized**

Show full pallet quantity on count: **Inactive**

Filter By Count Number

1 ▾

[Inventory Snapshot](#) [Create Next Iteration](#)

[Commit Preview](#)

25

Pending Confirmation

More Info

2

Committed

More Info

Multiple Iterations

The **Create Next Iteration** button is used for creating a new iteration in order for the warehouse personnel to be able to re-count the correct cycle count products. On the second and third iterations the product count that will be used to make inventory adjustments will be the latest count quantity that is larger than 0.

The **Commit Preview** button is used to redirect the user to the **Results** page in order to be able to allow and deny inventory adjustments based on the counted products.

3.8 Inventory Tracking

3.8.1 Overview

At the Inventory Tracking page we can see the history of the products in the system. In this page the user can filter the products by Date, Item, Lot, Serial and Pallet. This shows other information, such as the date of the transaction, type of transaction, number of products, weight and user.

Inventory Tracking View the history of products
[Home](#) / [Inventory Tracking](#)

Search Tags:	Transaction	Date Range	Warehouse User
<input type="text" value="Search"/> <input type="text" value="Please select an c"/> <input type="button" value="Q"/>	<input type="text" value="All"/>	<input checked="" type="checkbox"/> 02/01/2023 - 02/28/2023	<input type="text"/>

Inventory tracking results 📄

2/7/2023	38N436FP	Picking	4"x36" Nipple FLxPE	1 EA
2/7/2023	251802DW20	Picking	18" x 20' DW Non-Perf Pipe 18850020DW	100 LF

Tracking Details

When the user clicks any of the tracking information boxes they will be able to view additional information about the transaction. The information shown is grouped by the transaction, the item and the date.

5/11/2019

Shipping

Item: A00001 - J.B. Officeprint 1420

<p> 3:38 AM Quantity: 22 EACH</p>	<p>From: S1 User: ADDA</p>	<p>To: D1 Pallet: 51719143005</p>
<p> 3:38 AM Quantity: 1 EACH</p>	<p>From: S1 User: ADDA</p>	<p>To: D1 Pallet: 51719782</p>
<p> 3:38 AM Quantity: 15 EACH</p>	<p>From: S1 User: ADDA</p>	<p>To: D1 Pallet: 49919143003</p>

Info

Depending on the transaction being shown the information displayed on the boxes will change.

- **Item** : The ID of the Item.
- **Description** : Description of the item.
- **Quantity** : Quantity of products for that specific transaction.
- **Purchase Order** : The purchase order number.
- **Transaction Time** : The transaction date.
- **User** : The name of the person who started the transaction.
- **To** : The location it was moved to.
- **From** : The location it was moved from.
- **Pallet** : The Pallet the item is/was in.
- **Location** : The Location the item is/was in.

3.8.2 Transaction types

The displayed information will vary depending on the transaction type that is being shown, the available transaction types are the following:

RECEIVING

Purchase order number, From : Receiving location, Quantity : quantity received and User : transaction user.

INVENTORY ADJUSTMENTS

User : transaction user, From : adjustment location, Reason Code : the reason code selected by the transaction user, Quantity : adjustment quantity. Adjustments can be positive or negative and both quantities will be summed together on the box header.

RETURNS

User : transaction user, From : location the products were returned to, Sales order : sales order the return was created from and Quantity : returned quantity.

PUT AWAY

User : transaction user, From : receiving location, To : warehouse location the inventory was placed at by the transaction user and Quantity : quantity that was placed on the inventory location.

INVENTORY TRANSFER

User : transaction user, From : location the product was transferred from, To : location the product was transferred to and Quantity : quantity transferred.

PICKING

User : transaction user, Sales Order : sales order id, From : location the inventory was dispatched from and Quantity : quantity dispatched.

SHIPPING

User : transaction user, Sales Order : sales order id, From : picking location, Quantity : quantity dispatched and Pallet : represents the package/box number the product was packed to if applicable.

PICKING ADJUSTMENTS

User : transaction user, Sales Order : sales order id, From : picking location, Quantity : quantity adjusted.

RECEIVING ADJUSTMENTS

User : transaction user, Purchase Order : purchase order id, From : receiving location, Quantity : quantity adjusted.

PACKED BOX

Applicable if the warehouse uses packing. User : transaction user, Sales Order : sales order id, From : picking location, Quantity : quantity packed and Package Number : tracking id for box.

UNPACKED BOX

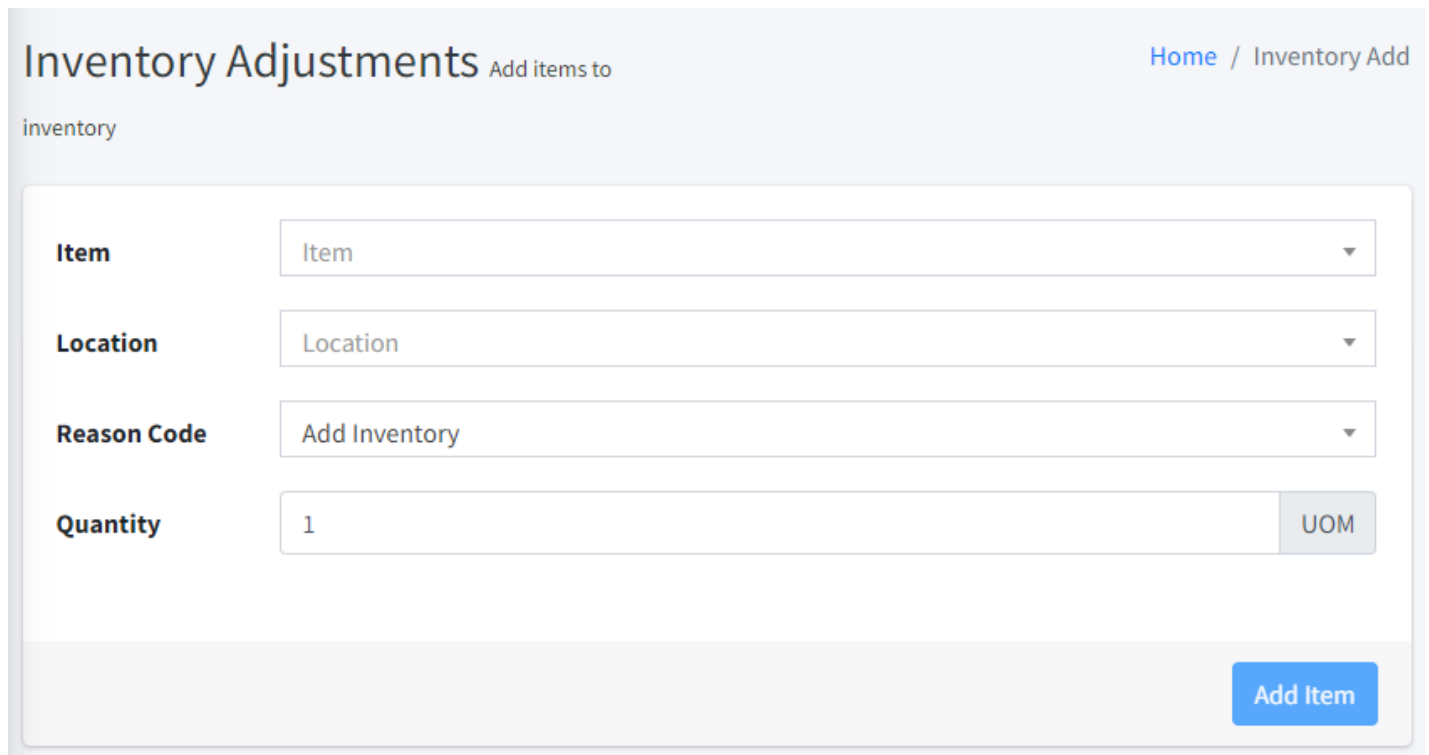
Applicable if the warehouse uses packing. User : transaction user, Sales Order : sales order id, From : picking location, Quantity : quantity removed from package, Package Number : tracking id for box.

3.9 Inventory Adjustments

3.9.1 Overview

Inventory Add is the process of incrementing the inventory level of a particular product. Every increment of items in inventory should have an associated reason selected by the user when executing the transaction. It is recommended to allow inventory adjustments to warehouse administrators or managers as they will have the power to adjust increase or reduce the inventory level of items. Inventory adjustments are used to correct any discrepancy found in inventory or report missing or damaged products.

3.9.2 Inventory Add



The screenshot displays a web interface for 'Inventory Adjustments'. The page title is 'Inventory Adjustments' with a subtitle 'Add items to'. A breadcrumb trail shows 'Home / Inventory Add'. Below the title, the word 'inventory' is displayed. The form contains four main input fields: 'Item' (a dropdown menu with 'Item' selected), 'Location' (a dropdown menu with 'Location' selected), 'Reason Code' (a dropdown menu with 'Add Inventory' selected), and 'Quantity' (a text input field with '1' entered). To the right of the 'Quantity' field is a 'UOM' (Unit of Measure) dropdown menu. A blue 'Add Item' button is located at the bottom right of the form.

In order to add inventory the user must provide the item id of the product, the location to place the item at, provide a reason code and the quantity to be added to the inventory. Optionally if the item uses serial, lot and expiration date the fields to add said information will be provided. After providing the requires information the inventory level of an item is increased.

Adding inventory

The Item Id input has the functionality to search for the Item Id by entering the partial id or the full Item Id.

Item	Item
Location	A0000
Reason Code	A00001 J.B. Officeprint 1420
Quantity	A00002 J.B. Officeprint 1111
	A00003 J.B. Officeprint 1186
	A00004 Rainbow Color Printer 5.0
	A00005 Rainbow Color Printer 7.5
	A00006 Rainbow 1200 Laser Series


The location input has the same partial search functionality. After selecting the item id and location id the user must select a reason code for the inventory and the quantity to be added.

If the item has multiple Unit of Measures then the user can select a unit of measure for the inventory add.

Item	A00001 J.B. Officeprint 1420	x
Location	L001	x
Reason Code	Add new bos	
Quantity	1	EACH

Add Item

INVENTORY INPUTS WITH ITEM USING LOT.

Item	71A004 Fibula Segment Large	x ▼
Location	L001	x ▼
Lot	Lot	
Expiration date	02/27/2023	
Reason Code	Add Inventory	▼
Quantity	1	UOM: EACH

INVENTORY INPUTS WITH ITEM USING PALLET AND LOT.

Item	A00002 J.B. Officeprint 1111	x ▼
Location	L001	x ▼
Lot	Lot	
Expiration date	02/27/2023	
Pallet	Pallet	
Reason Code	Add Inventory	▼
Quantity	1	CASE ▼

3.9.3 Inventory Remove

The screenshot shows a web interface for 'Inventory Adjustments' with the subtitle 'Remove items from'. The breadcrumb navigation is 'Home / Inventory Remove'. Below the title, the word 'inventory' is displayed. The form contains four main input fields:

- Item:** A dropdown menu with the placeholder text 'Item'.
- Location:** A dropdown menu with the placeholder text 'Location'.
- Reason Code:** A dropdown menu with the selected value 'Adjustment to Inventory by Counting.'
- Quantity:** A text input field containing the number '1', followed by a 'UOM' (Unit of Measure) button.

A blue 'Remove Item' button is located at the bottom right of the form area.

Inventory level of an item is reduced.

The inventory remove inputs are very similar to the inputs available when adding inventory. Item id and location id inputs have the partial search functionality as well.

INVENTORY INPUTS WITH ITEM USING LOT.

If the item being removed uses lot number the system will automatically put the lot id at the lot input after the user selects a location id. If the item has multiple lot ids on the same location then the lot input will contain a list of the available lot ids.

INVENTORY INPUTS WITH ITEM USING PALLET.

If the item being removed uses a pallet id the system will automatically put the pallet id at the pallet input after the user selects a location id. If the item has multiple lot ids on the same location then the pallet input will contain a list of the available pallet ids.

Inventory Adjustments Remove items from

[Home](#) / Inventory Remove

inventory

Item

A00002 J.B. Officeprint 1111



Location

L001



Lot

2323232

Pallet

PS1

Reason Code

Adjustment to Inventory by Counting.



Quantity

1

CASE ▾

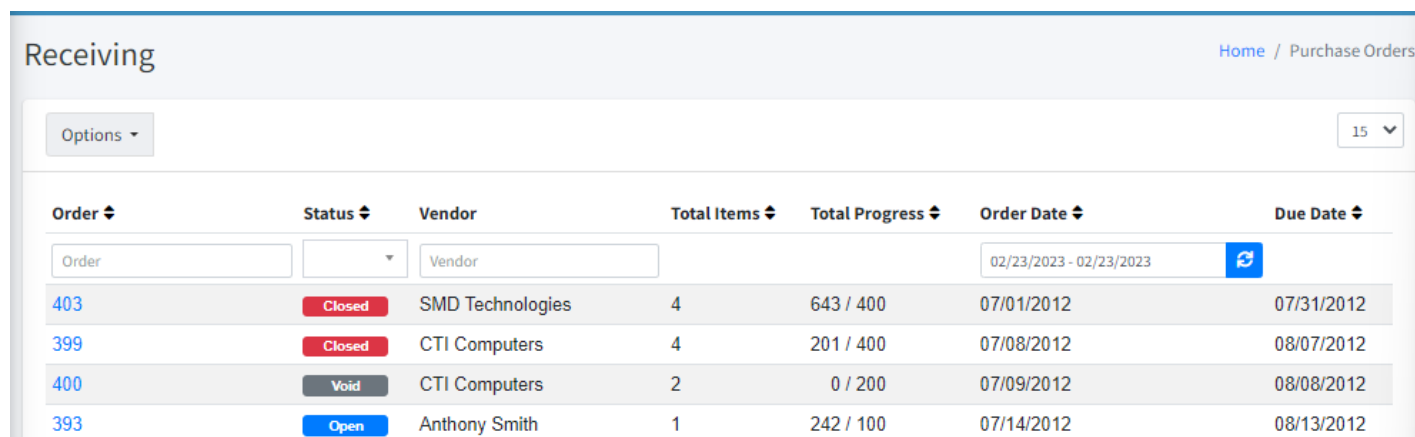
Remove Item

3.10 Receiving

3.10.1 Receiving Order

The Receiving Order screen is where the user will be able to view all of the orders that may be received.

The filters available for this screen are for the Order , order Status , Vendor name and the Order Date .



Receiving Home / Purchase Orders

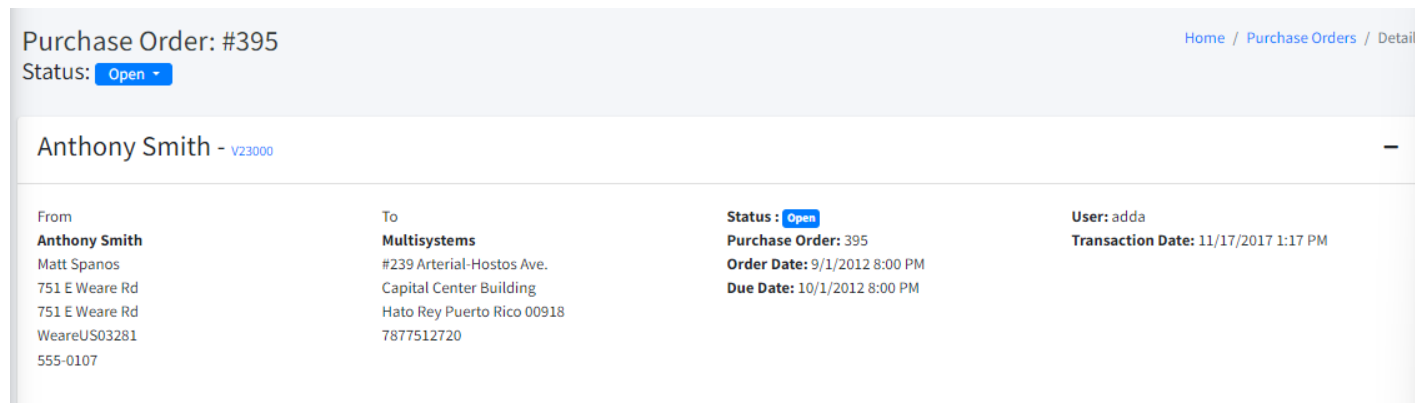
Options ▾ 15 ▾

Order	Status	Vendor	Total Items	Total Progress	Order Date	Due Date
<input type="text" value="Order"/>	<input type="text" value=""/>	<input type="text" value="Vendor"/>			<input type="text" value="02/23/2023 - 02/23/2023"/>	
403	Closed	SMD Technologies	4	643 / 400	07/01/2012	07/31/2012
399	Closed	CTI Computers	4	201 / 400	07/08/2012	08/07/2012
400	Void	CTI Computers	2	0 / 200	07/09/2012	08/08/2012
393	Open	Anthony Smith	1	242 / 100	07/14/2012	08/13/2012

If we click the order number we will see the Purchase Order Details.

Purchase Order Details

At the top left of this screen we can see the Purchase Order number. Below that we can see the information about the Order such as:



Purchase Order: #395 Home / Purchase Orders / Detail

Status: Open

Anthony Smith - v23000 -

From Anthony Smith Matt Spanos 751 E Weare Rd 751 E Weare Rd WeareUS03281 555-0107	To Multisystems #239 Arterial-Hostos Ave. Capital Center Building Hato Rey Puerto Rico 00918 7877512720	Status: Open Purchase Order: 395 Order Date: 9/1/2012 8:00 PM Due Date: 10/1/2012 8:00 PM	User: adda Transaction Date: 11/17/2017 1:17 PM
--	--	--	--

- From : The receiving order vendor.
- To : To whom the order will be delivered to (our warehouse).
- Status : The status the order currently has.
- Purchase Order : The purchase order number.
- Order Date : The date the order was created.
- Due Date : The date the order is due at.
- User : The transaction user.
- Transaction Date : The transactions date and time.

Info

If the receiving order has been partially received and the user attempts to close it they will receive a warning message letting them know the order status will be changed to back order. To override this and completely close the order the user can click the close order button again.

Below the order header information is the order details.

Detail
[Receiving order info](#)

Options ▾

Line # ↕	Item ↕	Description	Total Progress ↕	Comment	
	<input type="text" value="Item"/>				
0	LM4029PS	LeMon 4029 Printer Power Supply	0 / 100 EACH	LeMon 4029 Printer Power Supply	Adjustments
1	C00003	Vpulse, Thermal Knee Pad L	0 / 100 EACH		Adjustments
2	C00009	Keyboard Comfort USB	29 / 100 EACH		Adjustments

Total records: **3**

The order details consists of the Line number , Item , Description , Total Progress and Comment .

RECEIVING ADJUSTMENTS

To adjust a receiving order the user must click the highlighted blue text on the Total Progress field.

In the progress page the user can view the progress made on a specific item by line and the user can remove specific lines if the order is open or in use.

If the order is not open or in use the Remove button will not be shown.

If the user doesn't have the appropriate permissions the Remove button will not be shown.

History

Line #: 2 Item: C00009

[Home](#) / [Purchase Orders](#) / [Order 395](#) / [History C00009](#)

Options ▾
15 ▾

Location ↕	Lot ↕	Pallet ↕	Serial ↕	Quantity ↕	Weight ↕	Expiration Date ↕	User	Date ↕	
R1	8			1 EACH	0.00 LBS	02/08/2022	adda	02/07/2022	Remove
R1	8			1 EACH	0.00 LBS	02/08/2022	adda	02/07/2022	Remove

ADJUSTMENTS HISTORY

To view the adjustments that were made for a specific order click on the Adjustments button on the right side of the line item and you will be redirected to the Adjustments History Screen.

Adjustment History Line #: 2 Item: C00009

[Home](#) / [Purchase Orders](#) / [Order 395](#)
/ [History C00009](#)

Options ▾

Location	Serial	Lot	Pallet	Quantity	Weight	Username	Date
R1		8		1 EACH	0.00 LBS	adda	02/07/2022

Total records: 1

3.10.2 Receiving Order Info

The receiving order info tab is used to visualize the information that was entered by the transaction user that began the order receipt.

Export Status : If the order was exported to the ERP the status will be shown as **Exported** otherwise as **Local** .

Detail Receiving order info

Options ▾

Container	Seal	Export status	Way Bill Number	Comment	Username	Date
<input type="text" value="Container"/>		<input type="text" value=""/>				
	89	Exported		55	adda	02/07/2022

Total records: 1

3.10.3 Product Label Print

If the warehouse has the **Print Receiving Label** setting enabled the user will be able to print product labels based on a receiving order.

Click on the arrow button of the top right of the screen and then Label print .

Purchase Order: #58304
 Status: Open

B&K LLC - B&K1

Detail [Receiving order info](#)

Options 15

Line #	Item	Description	Total Progress	Comment
1	27C050NL	1/2" Coupling Brz Thd NO LEAD 454-003-NL	0 / 20 EA	Adjustments

RECEIVING LABEL PRINT MODAL

The receiving label print modal is used to search or select the items available for the current receiving order and check the check-box for the items that the user wants to print.

Label print ✕

Search

Print all
Print selected
View selected

27C050NL 1/2" Coupling Brz Thd NO LEAD 454-003-NL 0 / 20 EA	1	<input type="checkbox"/>
27C075NL 3/4" Coupling Brz Thd NO LEAD 454-004-NL 0 / 10 EA	1	<input type="checkbox"/>
27C150NL "1-1/2" Coupling Brz Thd NO LEAD" 454-007NL 0 / 10 EA	1	<input type="checkbox"/>
27C200NL	1	<input type="checkbox"/>

Next >

Pages: **1 / 2**
 Total records: **40**

After checking the boxes for the items the user wants to print and clicking `Print selected` or clicking `Print All` the user will be able to select to which printer send the information to be printed.

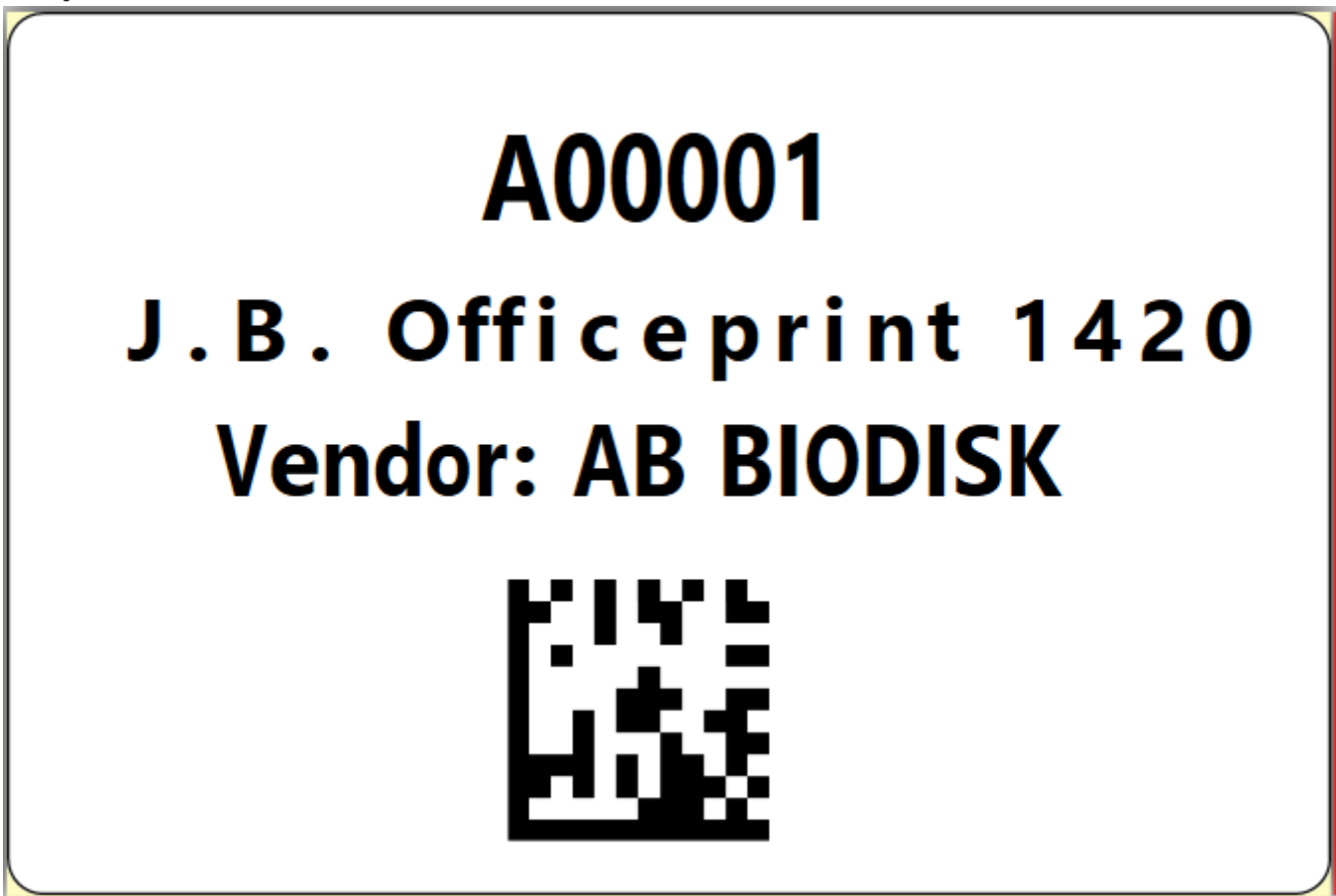
Info

The user can specify the quantity of labels to print for each item by changing the quantity on the right side input.

The available fields to be printed on the label for the receiving item are the following:

Vendor : Order vendor Name. Item : Item Id. Description : Item Description. Purchase Order : Order Id.

Example barcode:

**Info**

The printers list will vary depending on the configured system printers. In order to print from the cloud to a local printer WDCS provides a tool named Cloud Printer Client. It is recommended to have only one local installation of the software. View `Cloud Printer Provider` for more information.

3.11 Picking Overview

Picking is the process of moving inventory from a warehouse location into a staging location and eventually going out of inventory via a shipping process. In the picking screen, the user can select the picking orders on the system by Trip or by All orders.

3.11.1 Trips

Trips are used to logically group sales orders based on the same trip id.

The total sales orders number displayed at the following picture represents the count of all the open sales orders by trip.

The screenshot shows the 'Picking Trips' interface. At the top right, there are navigation links for 'Home / Trips'. Below the header is a search bar and an 'All' button. An 'Options' dropdown menu is visible. The main content is a table with the following data:

Trip	Assigned to	Total Sales Orders	Total Ordered
SE		2	4 / 212
T1		50	89 / 6662

Info

If the system doesn't have any trips it will automatically redirect to the Orders Screen.

3.11.2 Orders

In the Picking Order screen we can filter by the Sales Order, Status, Customer Name and Order Date.

The screenshot shows the 'Picking Sales Orders' interface. At the top right, there are navigation links for 'Home / Trips / Sales Orders'. Below the header is a search bar, an 'Options' dropdown menu, and a page size selector set to '15'. The main content is a table with the following data:

Sales Order	Status	Trip ID	Total Items	Total Progress	Customer	Last/Current User	Order Date
81228	Closed	ESTE	4	12 /	21 Ace Caguas Commercial	adda	08/17/2022
812281	Closed	ESTE	4	6 /	28 Ace Caguas Commercial	adda	08/17/2022
ORD00000000276	Shipped		1	1 /	1 Bargain Mart - San Diego	adda	06/27/2022
ORD00000000275	Shipped		2	13 /	13 Bargain Mart - San Diego	adda	06/17/2022

On the right side of the screen, when the user clicks the dots they will see a few actions.

Picking right side dots

detail : Will redirect the user to the details screen. Print : When the user clicks the print button they will be shown a modal with printer options to choose from in order to print the sales order.

Info

The printers list will vary depending on the configured system printers. In order to print from the cloud to a local printer WDCS provides a tool named Cloud Printer Client. It is recommended to have only one local installation of the software. View [Cloud Printer Provider](#) for more information.

Example of a printed order:

Sales Order

Customer Id: J00002

Bill to

J00002
 Capital Center Bulding Suite 104
 Hato Rey
 00918
 787-751-2720

Ship to

Caguas
 00725
 787-751-2720

Order Number	Order Date	Customer PO
81228	08/17/2022 04:00	

Line	Item	Description	Qty
0	11-20-020	Delta Universal Showering Components: 4-Setting In2ition - 75491SN	3 / 3 EACH
1	11-20-011	FUNDAMENTAL SINGLE SETTING SHOWERHEAD- 52653-PK	3 / 6 EACH
2	11-20-021	Delta Universal Showering Components: 5-Setting Shower Head - 75564CWH	3 / 6 EACH
3	11-20-022	Delta Universal Showering Components: 7-Setting Shower Head - 75784	3 / 6 EACH

Detail

On the Picking Order Detail page the user will see in-depth information about the picking order chosen, such as the Company information, Customer Bill To, Customer Ship To, Status and other additional information.

Sales Order: #0000013 Home / Sales Orders / Detail
 Status: Shipped

Nexus Construction Co. - NEXUS

Multisystems #239 Arterial-Hostos Ave. Capital Center Building Hato Rey Puerto Rico 00918 7877512720	Bill To Nexus Construction Co. 7855 E. Jamboree Irvine 92714 CA (714) 332-4751	Ship To 7855 E. Jamboree 92714	Status : Shipped Export status : Exported Order : 0000013 Customer : NEXUS Order Date : 5/20/2022 12:00 AM Due Date : 5/20/2022 12:00 AM
---	---	--------------------------------------	---

Detail Shipping information

Packing

Options ▾

Line #	Item	Description	Progress
1	12345667	Tube	11 / 11 EACH

Adjustments

The Status Dropdown is used to change the order status.

Info

Depending on the warehouse configuration if the order status is changed to closed the order will be automatically shipped. The warehouse's autoshipping setting must be enabled in order for this to work.

The order details table will have information about the line items of the order such as the Line number , Item id , Description , and the Picking Progress .

Export Status : The export status is used to inform the user if the shipping order has been exported to the ERP.

PICKING ADJUSTMENTS

The Progress numbers on every line item are used to visualize the picked quantities for each line but it can also be used to make any adjustments if necessary to the quantities dispatched. If the user has the necessary permissions the numbers will be highlighted in blue and if clicked it will redirect the user to another screen where they will be able to make picking adjustments.

Picking Adjustments

If the user has the appropriate permissions the right side of the screen will contain a remove button in order to remove any lines picked.

ADJUSTMENT

Shows the adjustments made at the progress page.

Adjustment History Line #: 32 Item: A1-757/G [Home](#) / [Sales Order](#) / [Order ORD000000000271](#)
/ History A1-757/G

Options ▾

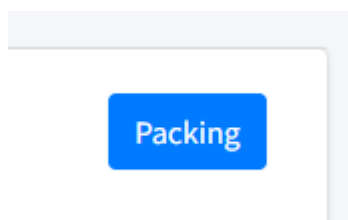
Location ↕	Serial ↕	Lot ↕	Pallet ↕	Quantity ↕	Weight ↕	Username	Date ↕
S1				1 Ea.	0.00 lbs.	adda	07/11/2022
S1				1 Ea.	0.00 lbs.	adda	07/11/2022

Total records: 2

3.11.3 Packing

How to get to the packing web screen

When the picking order is closed we can access the Packing page for the order using the **Packing** button at the picking detail.



The packing screen can also be easily accessed by going to the Shipping sub menu and clicking **Pending** at the left side bar. That screen will filter all the closed orders that are available to be packed.

Packing transaction

In this page the user can Create Packages using the **Create Box** button. Each package will have a unique tracking ID that is used to track the packages. When the user creates a package they will be able to add the item quantity available from the inventory picked on the left side of the screen.

Use the **Create Box** button to create packages.

Sales Orders: #504 Home / Orders / Sales Orders

Oscar Cash & Carry - C99999 +

Inventory Picked Search Item

Item	Description	Serial	Lot	Qty	Transaction User
A00001	J.B. Officeprint 1420			0 / 25 EACH	

Packs created packages for shipping Go To Shipping

Press 'Select box' to begin packing items All

Pack #	Items #	Date	Status
5042367949	0	02/23/2023	Open ...

[Create Box](#)

Package quantity: 1

Info

The tracking id for the boxes is an auto-generated number consisting of a sequential number, the current date in julian format and the order id.

In order to be able to add items to packages the users will have to click on the **Select Box** button inside the three dots besides the package or by clicking the **Package number** highlighted in blue. When a package is selected the user will see every item available in the picking order and will be able to add the quantity of items needed. After adding the items the user can move the package to the dock in order to begin the shipping process.

Sales Orders: #491 Home / Orders / Sales Orders

Honeywell Aerospace - C40000 +

Inventory Picked Search Item

Item	Description	Serial	Lot	Qty	Quantity
A00001	J.B. Officeprint 1420			3 / 107 EACH	104 +
A00002	J.B. Officeprint 1111	124		0 / 90 EACH	90 +

Package Number # 4912233785 - Open Back

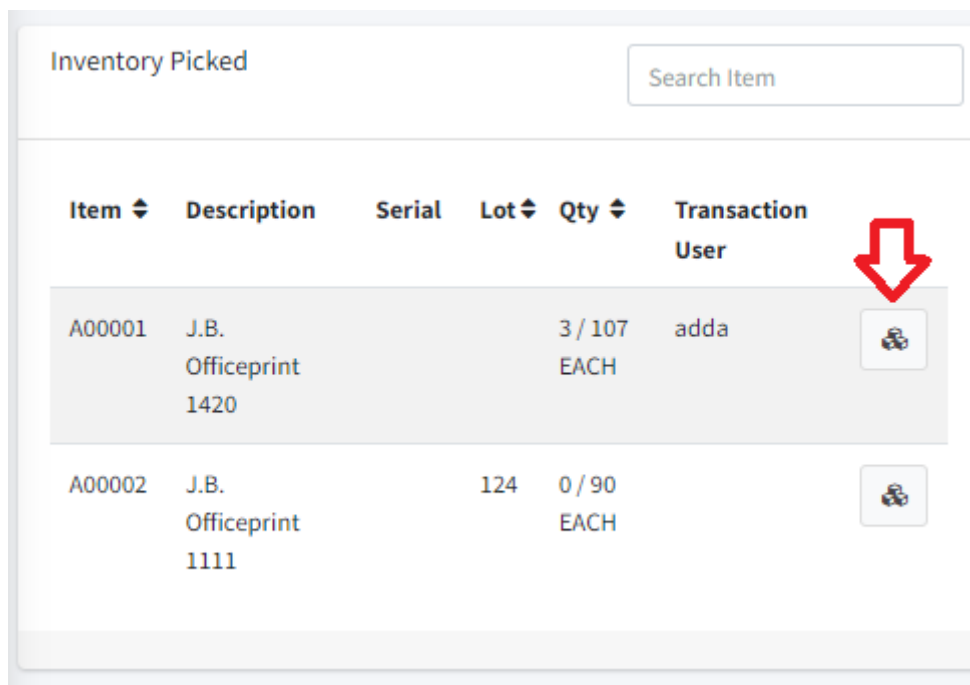
Item	Description	Serial	Lot	Quantity
A00001	J.B. Officeprint 1420			3 EACH Delete

Close box Open box

When inventory is added to a package the quantity available at the left side of the screen will be subtracted from the total quantity available.

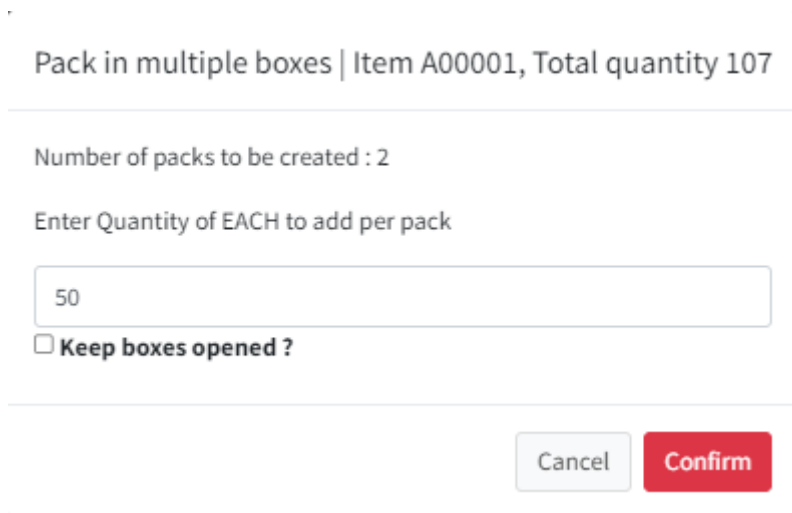
CREATE MULTIPLE BOXES

The user will also be able to create multiple boxes from the same item if needed. In order to do so, click the boxes icon on the right side of the line item.



A modal will open, the modal will contain information about the item that the user chose to pack in multiple boxes.

At the top right corner the Item Id and Total Quantity will be shown. On the middle side of the modal we will be able to see the Number of packs to be created based on the quantity the user wants per package.



After clicking the confirm button, boxes will be created based on the user input.

VIEW PICKING HISTORY

The system show all the picking history information of the selected Sales Order, such is: Line #, Item, Location, Destination Location, Pallet, Lot, Quantity, Weight, Expiration Date, User and Date.

Sales Order: #494 Home / Sales Orders / Detail
 Status: Shipped

Pura Energía - C60000 +

View Detail | View Picking history | View Shipping information

Options ↻

Line #	Item	Location	Destination Location	Pallet	Lot	Quantity	Weight	Expiration Date	User	Date
1	A00001	L001	S1			10 EACH	0.00	05/13/2021	adda	3/18/2022 4:56 PM

Total records: 1

VIEW SHIPPING INFORMATION

The system will display all the information regarding an specific Sales Order, such is: Shipping Reference, Tracking, Ship To, Dock, Export Status, Transaction Date, Return Date and Returns.

Sales Order: #494 Home / Sales Orders / Detail
 Status: Shipped

Pura Energía - C60000 +

View Detail | View Picking history | View Shipping information

[Return Complete Order](#) ↻

Shipping Reference	Tracking	Ship to	Dock	Export status	Transaction Date	Return Date	Returns
10039	test	Pura Energia	TESTDOCK	Exported	03/18/2022		


Total records: 1

RETURN COMPLETE ORDER


When the Return Complete Order button is selected, the systems prompt for the Return to Location and the Return Reason in order to process all the items in the Sales Order and return this items to the location selected.


Confirm Return Sales Order

Return to Location

Select Locations 

Return Reason

Select Reason Code 

Packing	Ship to	Dock	Export status 
t	Pura Energía	TESTDOCK	<input type="button" value="Exported"/>

3.12 Wave Picking Overview

A Wave may be used to summarize several orders into one transaction. A Wave is pre-determined based on a specific criterion. Regularly a Wave comprises all the orders that a specific truck may be delivering in the next trip. Since the movement of boxes for a Wave might be considerably big, this transaction is intended to be completed by the forklift driver. The user will be moving entire pallets from the warehouse into a staging location. When the Picking order process starts, the system will recommend to the user first the products staged by the Wave for fast movement. The Wave Order process does not affect the inventory levels of a product.

3.12.1 Index

The wave index screen contains the created waves if any.

Picking Control Home > Waves

🔔 There are pending waves

Options ▾

Wave	Status	Description	Due Date	Total Orders	Total Line #	Picking method	Assigned to
Wave	▾	Description	mm / dd / yyyy 🔍			▾	
82	Open	Wave	3/1/2021	4	0		adda Gen Mobile nmolina ...
83	Pending	Wave	3/2/2021	1	0	By Sales Order	...
85	Open	Wave	3/2/2021	0	0	By Items	adda Gen Mobile nmolina ...
89	Pending	Wave	4/19/2021	0	0	By Sales Order	...
90	Pending	Wave	4/20/2021	0	0	By Sales Order	...
95	Open	Wave	4/20/2021	0	0	By Sales Order	adda ...

Pages: 1 / 1 Total records: 6

This screen contains useful messages that will let the user know if there are any pending picking orders as well as any pending waves. At this screen with the appropriate permissions the user will be able to create new Waves.

3.12.2 Create Wave

Create Wave Wave configuration Home > Waves > Create

Information

Description

Due Date

Picking Method

The create wave screen contains input fields for the description of the wave the user wishes to create, the date the wave will be due at as well as the method the user wishes to use in order to pick the wave.

Picking Methods

Picking Method	Description
By Sales Orders	Picking of the wave will be ordered by the sales orders of all the orders that were selected for the current wave.
By Items	Picking of the wave will be ordered by the item ids of all the orders that were selected for the current wave.
Mixed Sales orders	Picking of the wave will be ordered by the item ids and sales order ids of all the orders that were selected for the current wave.

Info

The main difference between *Mixed Sales Orders* and *By Items* is that the console application will show the user the item id and the sales order it belongs to while picking the order, while the picking method *By Items* is used to pick all items and place them on the same location in order to divide them afterwards.

3.12.3 Add Orders

After creating the wave the user will be able to add the orders they wish to pick within said wave.

Add Orders Wave configuration

67 - WaveMapTest +

Pending Orders Add All

Options ▾ 15 ▾

Order ↕	Bill to ↕	Ship tp ↕	Route ↕	Trip ↕	Total Items	Due Date ↕
Order	Bill to	Ship tp	Route	Trip		04/21/2020 - 0 ↻
497	C99999	C99999		T1	1	1/28/2020 +
500	C99999	C99999		T1	1	1/28/2020 +
509	C99999	C99999		T1	1	1/28/2020 +

The wave add orders screen is composed of various important components, starting with the list of orders the user will be able to add to the wave.

After selecting the orders the wave will contain the user will be able to see a list with all the orders selected, at this part of the screen the user may remove some or all the added orders, or if they wish, continue with the next step.

Capacity Used +

Selected Orders [Next](#) [Remove All](#)

Options ▾

Order ↕

Order	
10-10-10	×
10-10-11	×
10-10-12	×
10-10-13	×
10-10-14	×

Pages: **1 / 1** Total Records: **5**

The next step will show the summary of the selected orders with the appropriate wave percentage for each order.

Summary

Cancel
Next

Total Sales Orders: 5

Options ▾

Order	Total Items	Wave Percentage
Order		
10-10-10	1	14.29%
10-10-11	1	21.43%
10-10-12	2	21.43%
10-10-13	1	21.43%
10-10-14	1	21.43%

Pages: 1 / 1
Total Records: 5

Info

The wave percentage represents capacity of the trucks

3.12.4 Assign users to a wave

After adding the sales orders to a wave you will be able to select the path, location and users that will be assigned to it. When users are assigned to a wave only those users will be able to select the wave when working on it on the console application.

Assign Users and Paths

[Home](#) > [Waves](#) > [Add Orders](#) > [Assign](#)

Paths P&P ▾

Locations L1 ▾

Users
✕adda
✕Gen
✕nmolina

Confirm

3.12.5 Wave Location

In order for a location to be available to be selected for a Wave Order the location must be created with the following configuration:

Location Type : Regular, Pick sequence : 1, Pick from location : On

3.12.6 Pick Sequence

On the pick sequence the user will be able to sort the selected orders using options populated on the dropdown. Based on the selected sorting the user can verify the selected orders on the Wave Map screen using the map button.

The wave picking sequence screen contains useful information like the Sequence number the orders will be picked by, Sales Order, Bill To and Ship To which contain the name of the customer bill to and customer ship to of the order, Route if any, Trip the trip the order belongs to, Total Items the total items for each order, Due Date, Travel time the travel time for each order based on the starting point in this case the warehouse.

Pick Sequence Sales Orders Sequence
Home > Waves > Add Orders > Pick Sequence

Select sort method

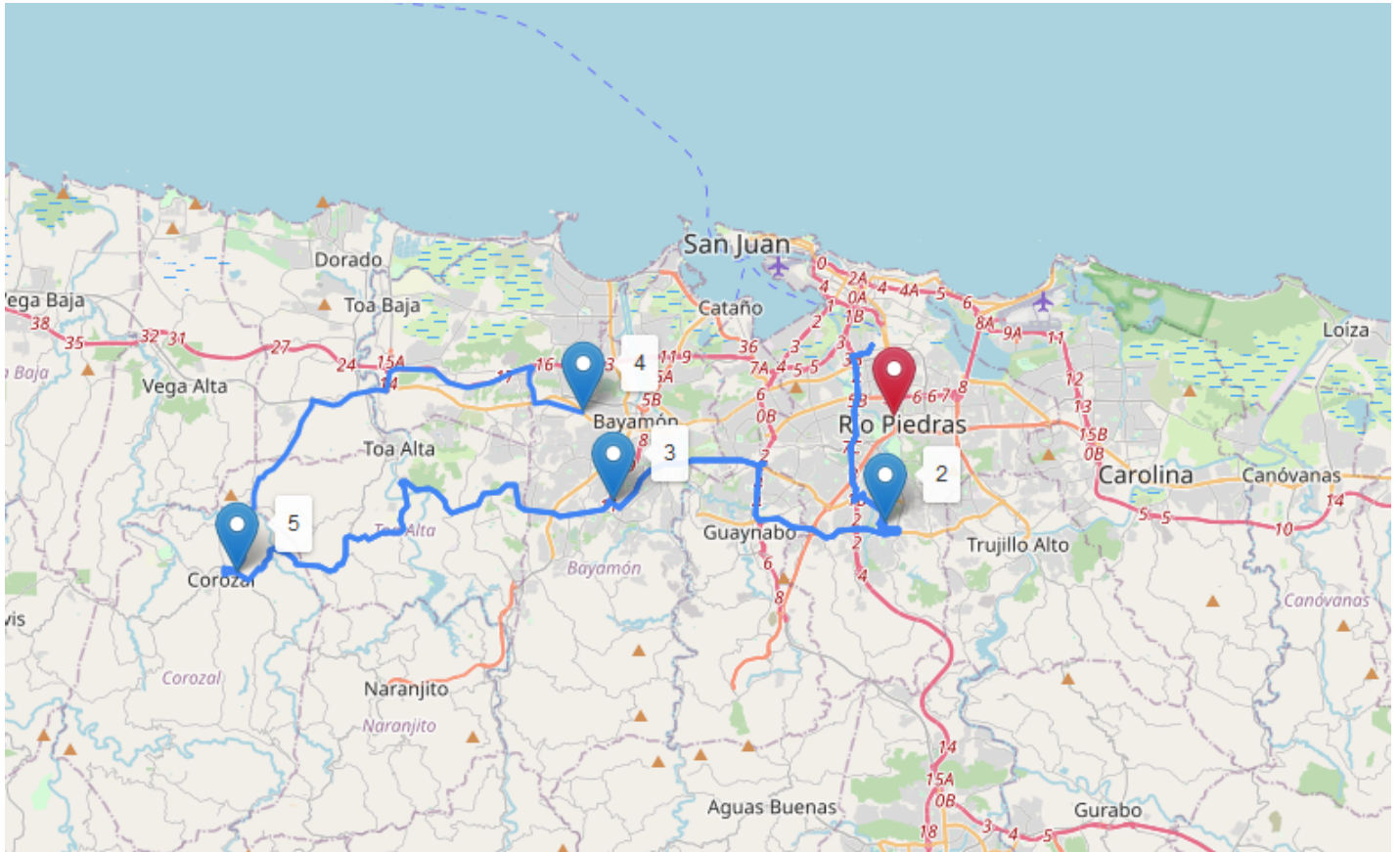
▼
Map
Confirm

Selected Orders

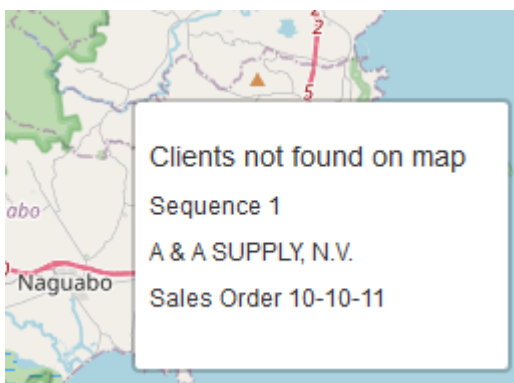
Sequence	Sales Orders	Bill To	Ship To	Route	Trip	Total Items	Due Date	Travel time
1	1000	FULL POWER HOLDING, CORP.	FULL POWER HOLDING, CORP.		SE	1	11/15/2019	0
2	1002	QUALITY SOLAR	QUALITY SOLAR		SE	1	11/15/2019	00:11
...

3.12.7 Wave Map

The wave map is used to visualize the recommended routes of sales orders in a wave depending on the chosen picking sequence for the orders. The red marker in the map represents the starting point (warehouse) and the blue markers represent the customer for each order. Each blue marker will have a sequence number used to identify the sequence in which the orders are sorted by. If the user clicks any of the blue markers they will be able to see the relevant sales order information such as the sequence number, sales order id and the customer name.



In any case insufficient information about the client was provided the map will show a friendly error letting the user know the order routes that weren't found on the map.



3.12.8 Wave Order Details

After finishing the configuration of the Wave Order you will be redirected to the details screen.

115 - test
Close Wave


Status: Open

Due Date: 12/29/2022

Picking Method: By Sales Order

Assigned to: adda

Progress By Sales Order



0.00% (0/3)

Sales Orders

Options ▾

Order ↕	Bill to ↕	Route ↕	Ship to ↕	Trip ↕	Total Items	Travel time	Due Date ↕	
<input type="text" value="Order"/>	<input type="text" value="Bill to"/>	<input type="text" value="Route"/>	<input type="text" value="Ship to"/>	<input type="text" value="Trip"/>			02/22/2023 - 02/22/2023	↻
496	Oscar Cash & Carry		Oscar Cash & Carry	T1	1	00:32	01/28/2020	
503	Oscar Cash & Carry		Oscar Cash & Carry	T1	1	00:32	01/28/2020	
506	Oscar Cash & Carry		Oscar Cash & Carry	T1	1	00:32	01/28/2020	

Total records: 3

The top left section is composed of the Wave Order information that was configured before reaching this screen.

Status : Is the status of the wave order.

Info

If the Wave Order is closed it will not appear on the console application. Closing a Wave order will not close the sales orders belonging to it.

Due Date : Wave Order Due Date is used for user reference and does not have any effect on the system's functionality.

Picking method : Refer to the picking method descriptions listed above.

Assigned to : The users the current Wave Order has been assigned to. The wave order will only be visible for these users on the console application.

At the right side of the upper corner of the screen you will be able to see the Progress for the Sales orders or Items for this Wave. For sales orders the progress is updated every time the user closes an order. For items it's updated every time an item is picked.

At the bottom side of the screen we will have a list of the Selected orders for the current Wave

If the Wave Picking method is mixed sales orders or items then the bottom side of the screen will also have a list of the Selected Order Items for the current Wave

Sales Orders
Items

Options ▾

Line # ↕	Item ↕	Description ↕	Total Quantity	Picked Quantity	UOM
	<input type="text" value="Item"/>	<input type="text" value="Description"/>			
1	A00001	J.B. Officeprint 1420	125	10	EACH

Total records: 1

3.13 Shipping

The Shipping process is the confirmation of what has been picked for a specific order. This is the process of actually loading off the truck. By completing the shipping, the amount of products will be deducted from the inventory. The shipping does not follow FIFO or LIFO rules since those rules would have been enforced when picking the products. For a case to be shipped for a specific order it must have been picked for that specific order. The shipping does decrease the inventory level of a product.

Shipping Sales Orders
[Home](#) / [Trips](#) / [Sales Orders](#)

Options ▾
15 ▾

Sales Order ↕	Status ↕	Trip ID ↕	Total Items	Total Progress	Customer	Last/Current User	Order Date ↕
<input type="text" value="Sales Order"/>	<input type="text" value=""/>				<input type="text" value="Customer"/>		<input type="text" value="02/22/2023 - 02/22/2023"/> ↻
81228	Closed	ESTE	4	12 / 21	Ace Caguas Commercial	adda	08/17/2022
812281	Closed	ESTE	4	6 / 28	Ace Caguas Commercial	adda	08/17/2022
0000001	Closed		2	75 / 77	Adams & Hanks	adda	05/04/2022
ORD000000000260	Closed		1	0 / 11	Bargain Mart - Oakland	adda	03/22/2022

On this screen the user will be able to view the information related to the shipping of a sales order:

Field Name	Usage
Sales Order	Displays the identification number of the sales order.
Status	The current status of an order such as Open/Closed.
Trip	Displays the number of trips the order had.
Total Items	Displays the number of items an order has.
Total Progress	Displays the progress of an order.
Customer	Displays the name of the customer who placed the order
Last/Current User	Displays the name of the last user that accessed the order
Order Date	Displays the date the order was placed

Start Shipping

On this page the user will be able to view all the created shipping headers for a specific order. When the user wants to create a new shipping header they can click on the [Create Shipping](#) button.

Shipping Order 496
[Home](#) > [Shipping](#) > [Sales Orders](#)

One Time Customer - [C99999](#)
+

Shipping Headers all carriers related to the order
[Create Shipping](#)

Tracking	Carrier	UDF 1	UDF 2	UDF 3	UDF 4	# Packs
						4

Shipping Order ORD000000000253 [Home](#) / [Shipping](#) / [Sales Orders](#)

Bargain Mart - Oakland - 1105 +

Enter Shipping Information this is the information of the carrier [Back to Shipping](#)

Tracking # Carrier

UDF 1 UDF 2 UDF 3 UDF 4

[Create Shipping Headers](#)

When creating a shipping header the user can enter vital information for the shipping of packages such as the tracking number, the shipping carrier, and four UDF fields. After creating the shipping headers, the user can choose to ship the package(s) or view the shipped packages.

3.14 Shipping History

After the user has finished the shipping process they may see the history of the shipped order in the shipping history screen. The initial screen shows the surface information about the sales orders that have been shipped such as the Sales Order number, the Status for both the shipping and picking, the user who shipped the order, Bill To, Dock, Transaction Date.

After selecting a shipped order inside the history screen the user will be able to view detailed information about the shipping.

Shipping History [Home](#) / [Shipping](#) / [History](#)

Options v

Sales Order ↕	Picking status ↕	Shipping status	Shipped by	Bill To	Dock	Transaction Date ↕
<input type="text" value="Sales Order"/>				<input type="text" value="Bill To"/>		
547	Shipped	Shipped	adda	Oscar Cash & Carry	TESTDOCK	1/11/2023 2:47 PM
ORD000000000271	Shipped	Shipped	adda	Mr. Stephen Kershaw	TESTDOCK	12/30/2022 2:10 PM
ORD000000000276	Shipped	Shipped	adda	Bargain Mart - San Diego	TESTDOCK	6/27/2022 10:54 AM
ORD000000000275	Shipped	Shipped	adda	Bargain Mart - San Diego	TESTDOCK	6/17/2022 9:27 AM

Shipping History Detail

Field Name	Usage
Package / Item	The tracking of the package or the item's id.
Status	The current status of a package.
Ship date	The date the sales order was shipped.
# Items	The number of items shipped.

Shipping history: #ORD000000000271 Detail [Home](#) / [Shipping](#) / [History](#) / [Detail](#)

Mr. Stephen Kershaw - 1520 +

Search Tags:

Search Q ▾

Options ▾

Boxes or items	Status	Ship Date	Item Quantity
ORD0000000002712312928	Shipped	12/30/2022	1
ORD0000000002712312929	Shipped	12/30/2022	1

Total records: 2

By clicking any tracking number the user will be able to see the contents of the selected package.

Search Tags:

Search Q ▾

Package Number # [ORD0000000002712312928](#) x

Item	Description	Packed by	Pallet	Serial	Lot	Quantity
<input type="text" value="Item"/>			<input type="text" value="Pallet"/>	<input type="text" value="Serial"/>	<input type="text" value="Lot"/>	
A1-757/G	Paper Clip Dispenser - Image-1500 Series	adda				1 Ea.

Options ▾

Boxes or items	Status	Ship Date	Item Quantity
ORD0000000002712312928	Shipped	12/30/2022	1

Total records: 1

SHIPPING HISTORY

The system will display all the information regarding the history of an specific Sales Order, such as: Sales Order, Picking Status, Shipping status, Shipped by, Bill To, Dock and Transaction Date.

Sales Order: #494 Home / Sales Orders / Detail
 Status: Shipped

Pura Energía - C60000 +

View Detail View Picking history View Shipping information Return Complete Order

Options ↻

Shipping Reference	Tracking	Ship to	Dock	Export status	Transaction Date	Return Date	Returns
10039	test	Pura Energía	TESTDOCK	Exported	03/18/2022		

Total records: 1

When a sales order number is selected the screen will show the following information: Boxes or Items (depending on the warehouse configuration), Status, Ship Date and Item Quantity.

View Shipping information

Search Tags: Return Complete Shipment

Search Q

Options ↻


Boxes or items	Status	Ship Date	Item Quantity
51223184164	Shipped	06/20/2023	1
51223184165	Shipped	06/20/2023	1
100XLG	Shipped	06/20/2023	1
100XLG	Shipped	06/20/2023	1

RETURN COMPLETE ORDER


When the Return Complete Order button is selected, the systems prompt for the Return to Location and the Return Reason in order to process all the items in the Sales Order and return this items to the location selected.


Confirm Return Sales Order

Return to Location

Select Locations 

Return Reason

Select Reason Code 

Tracking	Ship to	Dock	Export status 
t	Pura Energía	TESTDOCK	<input type="button" value="Exported"/>

3.15 Rma

3.15.1 Return Merchandise Authorization

Return Merchandise Authorization (Rma) is a request to return merchandise to the warehouse. Rma transactions have a header and details. Main Rma page shows the list of Rma transactions on the server with their respective status and date.

The screenshot shows the 'Rma Orders' page in the WDCS system. The page title is 'Rma Orders Return Merchandise Authorization'. There is a search bar for 'Order id' and a date filter for 'Transaction Date'. A table lists one RMA order with ID 1234, status 'Received', 1 total item, and a transaction date of 7/13/2021. The page indicates 1 page of 1 total records.

Order id	Status	Total Items	Transaction Date
1234	Received	1	7/13/2021

Rma Details

Rma details show the items with the quantity to be returned and the quantity accepted to inventory. An Rma may have one or more details that specify the amount of product to be returned to the warehouse inventory.

The screenshot shows the 'RMA Order: #1234 Detail' page. The status is 'Received'. There are buttons for 'Re-Open Order', 'Finish', and 'Reject'. The table below shows the details of the RMA order.

Line #	Item	Description	Lot	Serial	Pallet	Quantity	Status
1	A00001	J.B. Officeprint 1420				10 / 10 EACH	Open

3.16 Inter warehouse transfer

An inter warehouse transfer transaction is used to transfer inventory between warehouses, both the source warehouse and the destination warehouse must have the item in order to be able to transfer the inventory. Inventory will be reduced from the source warehouse and the destination warehouse inventory will be increased at the specified location.

3.16.1 Inter warehouse transfer requests list

The inter warehouse transfer requests list can be filtered by the transaction number, Source warehouse, Destination warehouse and Status.

Username : is the user that created the transfer request.

Date : the date the transaction was created.

Transaction number	Source warehouse	Destination Warehouse	Status	Total Items	Total confirmed	TotalPicked	Username	Date
TRN-950	ALMACEN	OUTLET	Open	1	0 / 23	0 / 23	adda	02/28/2023

Options ▾

Transaction number Source warehouse Destination Warehouse

Pages: 1 / 1 Total records: 1

Status	Description
Open	Order is open and ready to be picked.
In use picking	Order is being dispatched.
In use receiving	Order is being confirmed.
Completed	Order has been picked and confirmed.
Locked	Order is locked and editable, cannot be dispatched or confirmed.

3.16.2 Creating an inter warehouse transfer

On the Inter Warehouse Transfer screen the if the user has the appropriate permissions, they will be able to see the blue plus button on the lower corner.



After clicking the plus button the user will be redirected to the create screen where they will be able to begin creating the inter warehouse transfer request.

Create inter warehouse transfer request

Enter information to create inter warehouse transfer request

Source warehouse

ALMACEN

Destination Warehouse

OUTLET

Udf #1

Udf #2

Udf #3

Udf #4

Udf #5

Udf #6

Comment

The available inputs for the transfer request header are as follows:

Source warehouse : the warehouse the inventory will be transferred from.

Destination warehouse : the warehouse the inventory will be transferred to.

Udf Fields (1,2,3,4,5) : User defined fields used to enter any additional information that may be required. These fields are optional.

Comment : Used to enter any additional information that may be required. Optional field.

After entering all the information for the required fields the user will be able to add the products that are going to be transferred.

Create inter warehouse transfer request

[Home](#) / [Inter warehouse transfer](#) / Create

Enter information to create inter warehouse transfer request

Item	<input type="text" value="Item"/>
Quantity	<input type="text" value="1"/> UOM
Comment	<input type="text"/>

Options ▾

Line ↕	Item ↕	Description	Picked	Confirmed	Comment
No records found					

Pages: 0 / 0 Total records: 0

Item : Item id for the product to be transferred.

Quantity : Quantity to transfer. If the item has multiple Unit of Measures then a dropdown will be available for the user to select one.

Comment : Optional field used to add user defined information.

Enter information to create inter warehouse transfer request

Item	<input type="text" value="A00002 J.B. Officeprint 1111"/>
Quantity	<input type="text" value="23"/> EACH ▾
Comment	<input type="text" value="Less than the total qty may be picked."/>

After clicking the Add button a modal with a confirmation message will appear.

Inter warehouse transfer

From: ALMACEN

To: OUTLET

Create inter warehouse transfer request between ALMACEN to OUTLET and add detail for item A00002 with quantity 23 EACH.

No Yes

Once a detail has been added to the transfer request the details list will be populated.

Options ▾

Line ↕	Item ↕	Description	Picked	Confirmed	Comment	
1	A00002	J.B. Officeprint 1111	0 / 23 EACH	0 EACH	Less than the total qty may be picked.	Remove

Pages: 1 / 1 Total records: 1

A Remove button will be available to remove any details from the transfer request if necessary.

Edit inter warehouse transfer: TRN-950

Status: Locked ▾ ⓘ

Info

While the transfer request is being edited it will be on status Locked which means it cannot be picked, in-transit or confirmed. In order for the transfer to become available for the users to pick the user has to change the status to open using the dropdown.

Edit inter warehouse transfer: TRN-950

Status: Locked ▾ ⓘ

- Open
- Lock order

Edit inter warehouse transfer request

3.16.3 Transfer Request Details

The transfer request details screen contains information about the request header and it's details.

From : Source warehouse, where the inventory will be dispatched from. **To :** Destination warehouse, where the inventory will be received. **User :** User that created the transfer request. **Created date :** Date the transfer request was created.

Status	Description
Open	Order is open and ready to be picked.
In use picking	Order is being dispatched.
In use receiving	Order is being confirmed.
Completed	Order has been picked and confirmed.
Locked	Order is locked and editable, cannot be dispatched or confirmed.

Picked : The quantity of the product that was picked by line vs the quantity that was ordered. **Confirmed :** The quantity of the product that was confirmed to be received on the destination warehouse. **Confirmed History :** Will redirect the user to another page where they will be able to view all the inventory received for a specific line.

Inter warehouse transfer: #TRN-950

Home / [Inter warehouse transfer](#) / Detail

Status: Open ▾

Summary ▬

From: ALMACEN
To: OUTLET
User: adda
Created date: 2/28/2023

Details In transit

Options ▾

Line ↕	Item ↕	Description	Picked	Confirmed	Comment	
1	A00002	J.B. Officeprint 1111	0 / 23 EACH	0 EACH	Less than the total qty may be picked.	Confirmed history

Pages: **1 / 1**
Total records: **1**

The **In transit** tab is used to view all the inventory that is on it's way to the destination warehouse once it has been dispatched.

Inter warehouse transfer: #TRN-951 Home / Inter warehouse transfer / Detail

Status: In transit

Summary +

Details In transit

Options ▾

Line	Item	Description	Location	Pallet	Lot	Serial	Quantity	Weight	User	Transaction Date
1	A00001						22 EACH	0.00 LBS	adda	02/28/2023

Pages: 1 / 1 Total records: 1

3.16.4 Transfer request confirmation

Confirm all

To confirm all of the items dispatched on a transfer request the user must be logged into the destination warehouse. When logged into the destination warehouse after going to the order they will be able to see a **Confirm all** button on the top right corner of the **Details** or **In transit** tab.

Info

The order must be **In transit** and the user logged into the destination warehouse in order to confirm the inventory received.

Inter warehouse transfer: #TRN-952 Home / Inter warehouse transfer / Detail

Status: In transit

Summary +

Details In transit

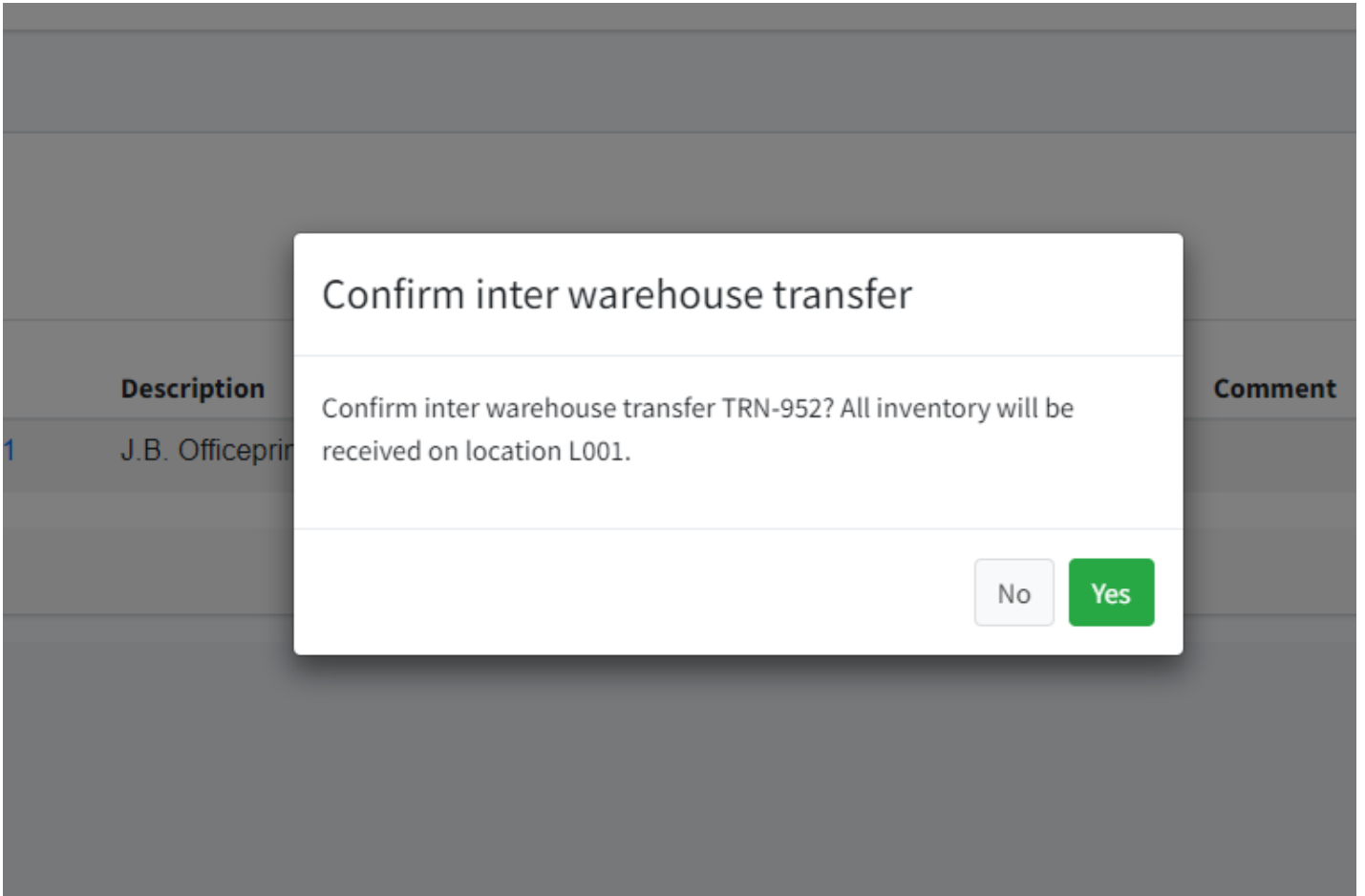
Confirm by line Confirm all

Options ▾

Line	Item	Description	Picked	Confirmed	Comment
1	A00001	J.B. Officeprint 1420	22 / 22 EACH	0 EACH	Confirmed history

Total records: 1

Once the confirm button is clicked and the modal is confirmed the inventory will be transferred to the destination warehouse at a default location.



Confirm by line number

When confirming by line number the user will be able to receive the products on a user specified location with the quantity the user wishes to receive. They will be able to reject lines and send them back to the source warehouse.

After clicking the `Confirm by line` button the user will be redirected to another screen.

Info

The order must be `In transit` and the user logged into the destination warehouse in order to confirm the inventory received.

Inter warehouse transfer: #TRN-952 Home / Inter warehouse transfer / Detail / Confirm

Status: In transit

Summary +

Pending to be confirmed Confirmed history

Line #	Item	Description	Lot	Serial	Pallet	Quantity
1	A00001					22 EACH

Pages: 1 / 1 Total records: 1

Confirm Item:
Specify location and quantity to be received.

Location

Quantity

The Pending to be confirmed tab contains all of the products that were dispatched from the source warehouse and are on transit to the destination warehouse. The + and - buttons are used to either reject or confirm receipt of the line items. Once either of those buttons are clicked the user will be able to confirm or reject the line item on the box at the right of the screen.

Here, the user will select the location the item will be placed at on the destination warehouse and the quantity to receive.

Confirm Item: A00001
Specify location and quantity to be received.

Location

Quantity
 UOM: EACH

When rejecting an item the available locations on the input will be the locations from the source warehouse.

Reject Item: A00001

Inventory to be sent back to source warehouse

Location

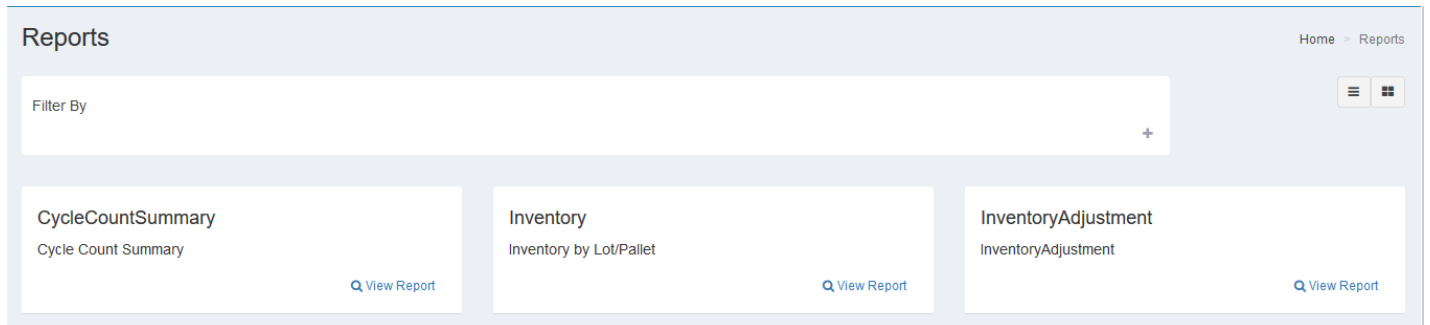
 ✕ ▾

Quantity

 UOM: EACH

3.17 Reports

WDCS provides reports for every major transaction. All reports can be exported to a pdf and be downloaded as the user needs.



3.17.1 Printing

In order to print a report from the cloud to a local printer WDCS provides a tool named Cloud Printer Client. It is recommended to have only one local installation of the software.

View [Cloud Printer Provider](#) for more information.

3.18 Vendors

The vendors page displays the entire list of vendors stored on the system. A vendor is associated with a Purchase Order.

Vendors Home > Vendors

Search

Options ▾

Vendor ↕	Name ↕	Contact ↕	City ↕	Country ↕
000001	AB BIODISK	ANNIKA ANDERSSON	SOLNA	SUECIA
V10000	Acme Associates	Sarah Kierl	Indiana	US
V1010	Far East Imports	Lawrence Miles	Tulare	US
V20000	Lasercom	Jimmy Miller	Cerritos	US
V23000	Anthony Smith	Matt Spanos	Weare	US
V30000	Blockies Corporation	Michael Morgan	Valley Stream	US

3.19 Customers

The customers page displays the entire list of customers stored on the system.

Customers Home > Customers

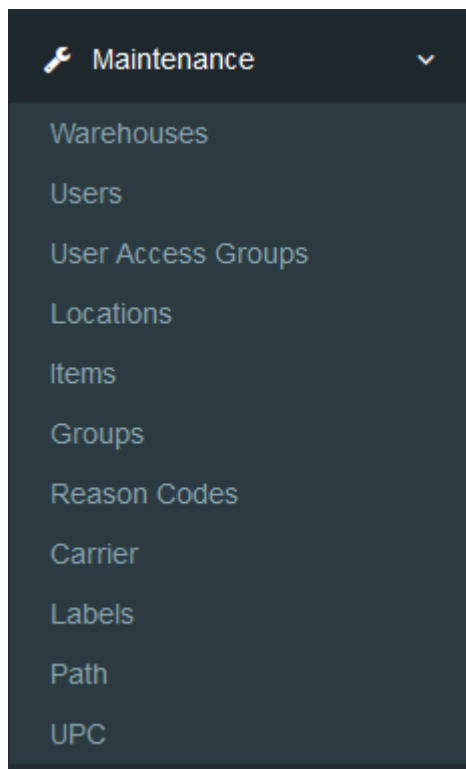
Search

Options ▾ 15 ▾

Customer ↕	Name ↕	Contact ↕	City ↕	Country ↕
000001	ABREU ESPINAL S. A.	DR. RUBEN ABREU	SANTIAGO DE LOS CABALLEROS	REPUBLICA DOMINICANA
000002	ABREVALCA SRL,	ANDREA	SANTIAGO DE LOS CABALLEROS	REPUBLICA DOMINICANA
000003	ADAMES MICHEL, SRL	LIC. ALBERTINA MICHEL	LAS MATAS DE FARFAN	REPUBLICA DOMINICANA
000004	ARS UNIVERSAL S. A.	ALEXIA ESPINAL/AUREA RODRIGUEZ	DISTRITO NACIONAL	REPUBLICA DOMINICANA
000005	ARS DE LAS FUERZAS ARMADAS	CORONEL BONILLA- FINANCIERO	DISTRITO NACIONAL	REPUBLICA DOMINICANA
000006	JICA REP. DOM. OFFICE	COBROS	DISTRITO NACIONAL	REPUBLICA DOMINICANA
000007	AGENCIA QUIMICA DOMINICANA, SRL	LIC. ISRAEL MILLOR	DISTRITO NACIONAL	REPUBLICA DOMINICANA

3.20 Maintenance

The maintenance menu comprises system configurations. Each option available in this menu is shown below.



3.20.1 Warehouses

The warehouse is the main division for the software. Users, products and locations are attached to one specific warehouse. The system supports one or more warehouses and each one of them should have its own set of users, products and locations. The warehouses tab shows us all the information related to the warehouse, such as the name of the warehouse, the address, phone number and whether the warehouse is active or not.

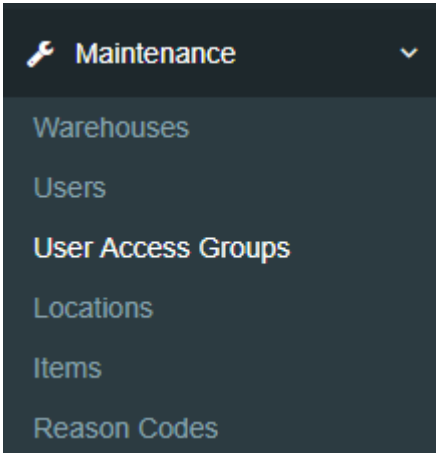
View [System Configuration](#) for details about the configurations available for the warehouse.

3.20.2 Users

On the Users screen, users are created in the system. A user exists only in the active warehouse. If a user needs to exist in two different warehouses, the user must be created for each warehouse independently. Each user must be assigned to a group. In the Users Tab we are shown all the information related to the users of the system, such as the username, userID, the group the user belongs to, the status of the user account, whether the user account has access to the web or mobile and the last time the user logged in. To learn more about this please visit the [Users Page](#) for further details.

3.20.3 Users and User Access Groups

Depending on the Access Group the user belongs to they will be able to create and administer groups. To learn more about this please visit the [User Access Groups Page](#) for further details.



3.20.4 Location

The location tab gives us access to information about the Location of various types of orders. A location is a place where products are stored, it can be from part of a rack or even an entire room. Since locations do not change very often they can be configured using this tab with the appropriate permissions.

3.20.5 Items

Items are assigned to a specific warehouse and each item must be configure with an specific unit of measure for boxes and one unit of measure for weight as well as other specific settings. The items tab gives us access to information related to the items stored in the warehouse, this information consists of the name, description, barcode, weight type and if the item uses serial number or not.

3.20.6 Reason Codes

Reason codes are used to specify why transactions of particular types were performed and to provide the appropriate accounts to be updated with the transaction amounts.

3.20.7 Carrier

3.20.8 Labels

3.20.9 UPC

The UPC maintenance screen is used to view all the UPC codes stored in system for each item. It can also be used to edit, add or remove UPC's.

The information table will contain the item id, UPC code, UOM Id (blank if not specified) and the date the UPC code was created.

Item UPC List of upcs in the warehouse Home > Item UPC

Options ▾ 15 ▾

Item	UPC	Uom	Date	
<input type="text" value="Item"/>	<input type="text" value="UPC"/>	<input type="text" value="Uom"/>	<input type="text" value="06/08/2021 - 06/08/2021"/>	<input type="button" value="⊕"/>
C00003	PA125		8/9/2019	<input type="button" value="✖"/>
C00003	TI015N		8/9/2019	<input type="button" value="✖"/>
I00007	test upc		3/11/2021	<input type="button" value="✖"/>

The red button on the far right can be used to delete a specific UPC code.

And the round blue button with the plus sign on the lower right corner of the screen can be used to create new UPC codes.

Adding a UPC

When adding a UPC the user will have to enter the item id, barcode value and a unit of measure.

Create UPC for an item

[Home](#) / [Item UPC](#) / [Create](#)

Information

Item *

UPC *

Uom *

3.21 Kit Refill

The kit refill transaction is the process of moving inventory from a regular location or another kit to a selected kit in order to replenish the bill of material.

Kit add or refill

Add kit to inventory or move components from

[Home](#) / Kit add/refill

inventory to refill kit

List of partial kits available in inventory Add new kit

Options ▾
↻

Warehouse	Serial	Kit	Description	Location
Warehouse × ▾	<input type="text" value="Serial"/>	<input type="text" value="Kit"/>	<input type="text" value="Description"/>	<input type="text" value="Location"/>
Warehouse	1234	Kit_1	Kit Desc	A01 Refill

In the kit refill screen the user will have a list of available kits to refill, a kit will appear on this list if the bill of material inventory is not complete.

3.21.1 Add new kit

Adding a new kit to inventory can be done by clicking the **Add new kit** button.

Kit add or refill

Add kit to inventory or move components from inventory to refill kit

[Home](#) / [Kit add/refill](#)

Enter serial information for kit to refill. If kit does not exist it will be created.

Serial

Kit

Location

[Cancel](#)

List of components that belong to this kit.

Item	Description	Required quantity per kit	On hand quantity
<input type="text" value="Item"/>			
No records found			

Total records: 0

Adding a new kit requires the user to enter a unique identifier for that kit. Then the user must select the kit from the products list, and finally select the warehouse location the kit will be added to.

Kit add or refill Add kit to inventory or move components from inventory to

[Home](#) / Kit add/refill

refill kit

Enter serial information for kit to refill. If kit does not exist it will be created.


Serial

Kit x ▾

Location x ▾

Cancel

List of components that belong to this kit.

Options ▾ 

Item ↕	Description	Required quantity per kit	On hand quantity
<input type="text" value="Item"/>			
A00001	Description	0 / 1 EACH	0 EACH +

Once the unique identifier, kit id and location have been entered the user can begin to move inventory to the kit. A list of the kit's bill of material will be displayed on the lower part of the screen.

The bill of material will have the Required quantity per kit and the inventory On hand quantity.

Moving inventory to a kit

To move inventory to a kit the user will have to click the + button on the right side of the list per item. Once this button is clicked a Modal will open with the required information to be entered in order to move the inventory from a warehouse location/kit to a kit.

Item to move

Bill of material inventory summary

✕

Warehouse

01

▼

Item

A00001

Location

WAREHOUSE

✕ ▼

Serial

Serial

Required quantity per kit

1 EACH

Quantity

1

UOM: EACH

Cancel

Move item

If a Serial/Pallet number is entered then the user will be moving inventory from one kit to another kit.

BILL OF MATERIAL INVENTORY SUMMARY

The bill of material inventory summary contains the inventory list information of the selected bill of material product and can be used to reference the information in the Item to move tab.

If no inventory is found the No records found message will appear.

Item to move

Bill of material inventory summary

✕

Options ▾

Warehouse Id	Kit	Pallet Id	Item	Description	Location Id	Serial Id	Lot Id	Quantity
01		Pallet Id	Item		Location Id	Serial Id	Lot Id	
No records found								
								Total records: 0

Once the user clicks the Move item button a modal with a confirmation message will appear.

Move item

Move 1 EACH of item A00001 to kit Kit_1 with serial 11236?

No
Yes

3.21.2 Refill kit

To refill a kit the user must click on the `Refill` button on the right side of the list. Once the user clicks that button they will be moved to the kit information tab which will contain the Bill of material list to move from a regular location or a kit to the selected kit.

Kit add or refill Add kit to inventory or move components from inventory to

[Home](#) / [Kit add/refill](#)

refill kit

Enter serial information for kit to refill. If kit does not exist it will be created.

[+ Create transfer request for kit refill](#)

[Count of transfer requests containing this kit 0](#)

Serial

Kit

Location

[Cancel](#)

List of components that belong to this kit.

Options

Item	Description	Required quantity per kit	On hand quantity
<input type="text" value="Item"/>			
A00001	Item Desc	8 / 8 EACH	0 EACH +

Moving inventory to a kit

To move inventory to a kit the user will have to click the + button on the right side of the list per item. Once this button is clicked a Modal will open with the required information to be entered in order to move the inventory from a warehouse location/kit to a kit.

Item to move

Bill of material inventory summary

✕

Warehouse

01

▼

Item

A00001

Location

WAREHOUSE

✕ ▼

Serial

Serial

Required quantity per kit

1 EACH

Quantity

1

UOM: EACH

Cancel

Move item

If a Serial/Pallet number is entered then the user will be moving inventory from one kit to another kit.

BILL OF MATERIAL INVENTORY SUMMARY

The bill of material inventory summary contains the inventory list information of the selected bill of material product and can be used to reference the information in the Item to move tab.

If no inventory is found the No records found message will appear.

4. Enterprise Resource Planning Connector

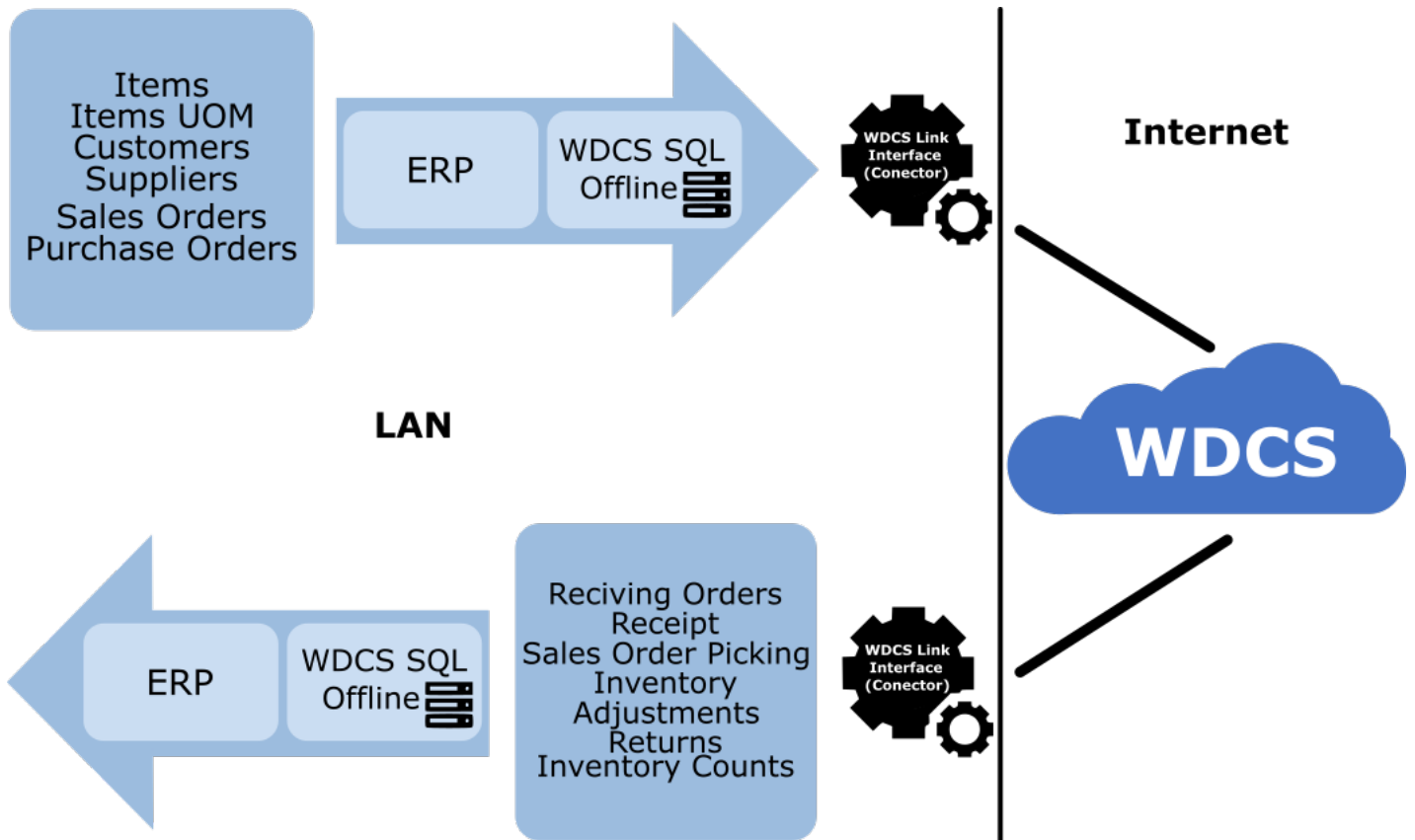
4.1 Enterprise Resource Planning Connector



WDCS connector is the software that links with the Enterprise Resource Planning (ERP) system. It is designed to provide a seamless integration between the ERP system and WDCS, allowing for an efficient data flow. This allows businesses to streamline their processes, improve data accuracy, and maximize the efficiency of their warehouse operations. The WDCS connector is a solution that is deployed on-premises and works in both offline and online modes. Through WDCS you can connect to a variety of ERP systems, including Oracle NetSuite, Microsoft Dynamics GP, SAP Business One, QuickBooks, Sage 50 (Peachtree), Sage 100 (MAS 90), Sage 300 (Accpac ERP) and more via API.

4.2 WDCSOffline ERP Link

As part of the set of solutions offered by MultiSystems, WDCSOffline serves as a linkage between WDCS and the client's Enterprise Resource Planning (ERP). It receives data from the client's ERP and then synchronizes with WDCS, using our WDCS/ERP Link Interface. Once the user completes a transaction inside our WDCS Console Client, it sends the output back to WDCSOffline's database. Finally, the client can access this information and generate invoices, bills, and inventory adjustments, among other functionalities.



4.2.1 Database Structure

ERP to WDCSOffline

The following list contains all the names of the tables belonging to the *Import Process* of WDCSOffline. Note that every table name has the word 'In' attached to the end for identification purposes.

ITEMIN

Items are any uniquely manufactured or purchased parts, materials, or products. *ItemIn* retrieves all the data related to products from the Item Master. The Item Master contains data that describes each item, including its description, itemCode, weight, lot number, and

quantity, among other fields. When the WDCS/ERP Link Interface synchronizes the Items, it also populates *ItemUnitOfMeasureIn* and *ItemUPCIn* tables.

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
Description ¹	Written representation of a product.	String
UomType ¹	Unit of measurement type. (e.g., 1 for weighted items. Else, use 0.)	Int (0,1)
UomDesc ¹	Written representation of an unit of measurement value.	String
PickingUom ¹	Unit of measurement used for picking. (e.g., Each, PQ3, DZ12)	String
UPC ¹	Universal product code. (e.g., ISBN book barcode)	String
AlternateNum ¹	Alternative identification code/number.	String
ReqGS1 ¹	Verifies if an item requires the Global Standard 1 (GS1) barcode.	Int (0,1)
UsesSerial ¹	Verifies if an item requires Serial Number identification.	Int (0,1)
SerialMask	Pre-defined serial number format used to generate serial numbers	String
ReqPallet ¹	Verifies if an item requires pallet (flat transport structure).	Int (0,1)
FullPalletQty ¹	Maximum amount used to fill a pallet platform. (depends on the item)	Int
ReqLot ¹	Verifies if an item requires Lot Number identification.	Int (0,1)
ReqProdDate ¹	Verifies if an item requires a Production Date value.	Int (0,1)
ReqExpDate ¹	Verifies if an item requires an Expiration Date value.	Int (0,1)
ValidExpDays ¹	Amount of days before a product expires.	Int
Brand	Product manufactured by a particular company under a particular name.	String
Category	Class with shared characteristics. (e.g., food, cosmetics, sauce)	String
Type	Set of common specific characteristics in products.	String
Weight ¹	Weight of a specific product.	Decimal (e.g., 10.05, 0.00)
MinAvailableWeight	Minimum weight amount required before warning.	Decimal (e.g., 7.51, 0.20)
MinWeight ¹	Product minimum weight capacity.	Decimal (e.g., 6.534, 6.204)
MaxWeight ¹	Product maximum weight capacity.	Decimal (e.g., 2.34, 10.20)
ItemPrimaryLoc	Product primary Warehouse location. (e.g., MainWarehouseId123)	String
PutAwayLocGroup	Location group for put away transactions.	String
Cube	Amount of the total available space that is actually utilized.	Decimal (95.4)
CaseQtyDesc	Description for number of boxes manufactured.	String
MinAvailableQuantity ¹	Minimum amount needed to keep a product inventory level.	Int
Deviation ¹	Statistical difference in the units being produced.	Int

Field Name	Description	Value
ExpirationOffset ¹	Days to expire after being received and added to virtual inventory.	Int (deprecated field)
Comments	Additional notes about a product.	String
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)
ExportMessage	Text description used in export transactions. (e.g., Item exported successfully.)	String
Udf1 - Udf10	User defined field. Udf are used to add custom values. (Up to 10 fields))	String

ITEMUNITOFMEASUREIN

Unit Of Measure(UOM) is the unit used to manage inventory quantities. There are different UOMs, depending on each product,e.g., bottle, dozen, package of 3, or box of 8. A product can have more than 1 UOM, but none can be empty. Also, UOMs could need quantitative conversions inside WDCS to store, pick or receive efficiently.

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
UomId ¹	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
EachCount ¹	Value of every one of a group. (e.g., EACH - 1, CJ14 - 14, CS24 - 24)	Int
Type ¹	Used to verify if the UOM is weight-based. (B for weighted-UOMs. Else, use A.)	String (A,B)
Cube	Amount of the total available space that is actually utilized.	Decimal (95.4, 37.2)
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)
ExportMessage	Text description used in export transactions. (e.g., Item exported successfully.)	String

ITEMUPCIN

Uniform Product Code (UPC) is a product barcode or numbering format used by retailers. They identify manufacturers and products and are placed in product packaging or labels.

Field Name	Description	Value
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
UPC	Universal product code.	String
Udf1 - Udf10	User defined field. Udf are used to add custom values. (Up to 10 fields))	String
Created_date ¹	Transaction's date of creation.	Datetime
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)
ExportMessage	Text description used in export transactions. (e.g., Item exported successfully.)	String

PURCHASEORDERIN

Purchase Orders (PO) are electronic or physical forms to officialize a transaction with suppliers or vendors. When a PO is generated in the client's ERP, it is then synced using the WDCS/ERP Link Interface and stored in *PurchaseOrderIN* and *PurchaseOrderDetailIn* tables. The most commonly used fields include Purchase Order Number, Order Date, Vendor Name, and Due Date.

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
PurchaseOrder ¹	Binding document created by a buyer and presented to a seller. (e.g., PO-1234)	String
Status ¹	Condition with respect to the PO process. (e.g., 0- Open, 1- In use, 2- Closed)	Int (0,1,2,4,5)
OrderDate ¹	Date when the order was processed and created.	Datetime
DueDate ¹	Date by which the transaction must be completed.	Datetime
DocId	Document identification number.	String
POSource	Origin of a Purchase Order(PO).	String
Reference	Unique identifier assigned to a Purchase Order.	String
VendorId ¹	Vendor's identification number.	String
VendorName ¹	Vendor's full name.	String
VendorContact	Vendor's contact name.	String
VendorVoicePhone	Vendor's contact phone number.	String
VendorFaxPhone	Vendor's fax number.	String
VendorAddress1 ¹	Place where the vendor is situated.	String
VendorAddress2	Extra information related to a Vendor's address.	String
VendorCity	Vendor's current city name.	String
VendorState	Vendor's current state.	String
VendorZipCode	Vendor's postal code.	String
VendorCountry	Vendor's current country.	String
VendorNote	Additional text related to a specific vendor.	String
VendorUdf1 - VendorUdf10	Vendor user defined field. Udf are used to add custom values. (Up to 10 fields))	String
Udf1 - Udf10	User defined field. Udf are used to add custom values. (Up to 10 fields))	String
Comments	Additional notes about a Purchase Order.	String
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)
ExportMessage	Text description used in export transactions. (e.g., Item exported successfully.)	String

PURCHASEORDERDETAILIN

PurchaseOrderDetailIn contains the list of items and quantities related to a specific transaction(PO). If a Purchase Order doesn't have any information inside this table, it wouldn't be processed.

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
PurchaseOrder ¹	Binding document created by a buyer and presented to a seller. (e.g., PO-1234)	String
LineNumber ¹	Particular sequence of product inside a Purchase Order.	Int
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
UomId ¹	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
OrderedQuantity ¹	Amount of product ordered.	String
UomWeight ¹	Unit of measurement identification value for weighted products (e.g., LBS)	String
OrderedWeight ¹	Product's weight amount ordered.	Decimal (e.g., 2.34, 10.20)
Udf1 - Udf10	User defined field. Udf are used to add custom values. (Up to 10 fields)	String

SALESORDERIN

Sales Orders(SO) are documents used to process customer shipments. *SalesOrderIn* manages essential information about the order header. (e.g., salesOrder number, customer identification number, and due date.)

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification number.	String
SalesOrder ¹	Commercial document prepared by a seller and issued to a customer. (e.g., SO-123)	String
SalesOrderSequence ¹	Preset sequence of Sales Order (SO) in the Picking process	Int
CustomerBillTo ¹	Party responsible for paying for a service or product.	String
CustomerShipTo ¹	Customer to send the products or services.	String
OrderDate ¹	Date when the order was processed and created.	Datetime
DueDate ¹	Date by which the transaction must be completed.	Datetime
Status ¹	Condition with respect to the PO process. (e.g., 0- Open, 1- In use, 2- Closed)	Int (0,1,2,3)
TripId	Route identification number.	String
Wave	Coordinate number for picking with shipping schedules.	String
RouteId	Identification number used for fleets delivering goods.	String
Freight	Goods transported in bulk.	String
CarrierId	Business identification number used for delivery.	String
MiscCharge	Charges added to order documents for costs other than for items purchased.	Decimal (e.g., 2.34, 10.20)
BillToCompanyName ¹	Customer Bill To full name.	String
BillToContact	Customer Bill To contact name.	String
BillToVoicePhone	Customer Bill To contact phone number.	String
BillToFaxPhone	Customer Bill To fax number.	String
BillToAddress1 ¹	Place where the Customer is situated.	String
BillToAddress2	Extra information related to a Customer's address.	String
BillToCity	Customer Bill To current city name.	String
BillToState	Customer Bill To current state.	String
BillToZipCode	Customer Bill To postal code.	String
BillToCountry	Customer Bill To current country.	String
BillToNote	Additional text related to a specific Customer.	String
BillToRoute	Custom route directions.	String
BillToInventoryHandling ¹	Warehouse used for the picking process.	String
BillToNote	Extra notes used for customer related information.	String
BillToPayTerms	Conditions surrounding the payment part of a sale.	String
BillToPriority ¹	Right of precedence over other customers.	String
BillToLocGroup ¹	Customer's location group identifier.	String
ShipToCompanyName ¹	Customer Ship To full name.	String

Field Name	Description	Value
ShipToContact	Customer Ship To contact name.	String
ShipToVoicePhone	Customer Ship To contact phone number.	String
ShipToFaxPhone	Customer Ship To fax number.	String
ShipToAddress1 ¹	Place where the Customer is situated.	String
ShipToAddress2	Extra information related to a Customer's address.	String
ShipToCity	Customer Ship To current city name.	String
ShipToState	Customer Ship To current state.	String
ShipToZipCode	Customer Ship To postal code.	String
ShipToCountry	Customer Ship To current country.	String
ShipToNote	Additional text related to a specific Customer.	String
Charges	Amount of money paid for a good or service.	Decimal (e.g., 2.34, 10.20)
Discount	Deduction from the actual cost.	Decimal (e.g., 2.34, 10.20)
Salesman	Seller assigned to the transaction.	String
Notes	Additional information about the Sales Order (SO).	String
Udf1 - Udf10	User defined field. Udf are used to add custom values. (Up to 10 fields))	String
BillToUdf1 - BillToUdf10	Billing user defined field. Udf are used to add custom values. (Up to 10 fields))	String
ShipToUdf1 - ShiptoUdf10	Shipping user defined field. Udf are used to add custom values. (Up to 10 fields))	String
Comment	Additional text field.	String
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)
ExportMessage	Text description used in export transactions. (e.g., Item exported successfully.)	String

SALESORDERDETAILLN

After the order header creation, *SalesOrderDetailLn* retrieves all the details from the products ordered. It stores the amount and unit of measurement requested. Every order must contain at least one product in *SalesOrderdetailLn* table to be processed.

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
SalesOrder ¹	Commercial document prepared by a seller and issued to a customer. (e.g., SO-123)	String
LineNumber ¹	Particular sequence of product inside a Sales Order.	Int
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
UomId ¹	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
OrderedQuantity ¹	Amount of product ordered.	String
AdditionalQuantity ¹	Amount in excess of the original load.	Int
UomWeight ¹	Unit of measurement identification value for weighted products (e.g., LBS)	String
OrderedWeight ¹	Product's weight amount ordered.	Decimal (e.g., 2.34, 10.20)
ValidExpPickDays ¹	Amount of days to pick a product before a product expires.	Int
Price	Product value.	Decimal (e.g., 2.34, 10.20)
ReferenceLine	Unique identifier assigned to a sales order detail line.	Int
Comment	Additional text field.	String
Udf1 - Udf10	User defined field. Udf are used to add custom values. (Up to 10 fields)	String

WDCSOffline to ERP

The following list contains all the names of the tables belonging to the *Export Process* of *WDCSOffline*. Note that every table name has the word 'Out' attached to the end for identification purposes.

RECEIVINGORDEROUT

Once a purchase order is processed and closed using our *WDCS Console Client* solution, the *ERP Link Interface* will send the result to *ReceivingOrderOut*, enabling data export back to the client's ERP for bill or receipt creation.

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
PurchaseOrder ¹	Binding document created by a buyer and presented to a seller. (e.g., PO-1234)	String
OrderDate ¹	Date when the order was processed and created.	Datetime
DueDate ¹	Date by which the transaction must be completed.	Datetime
Status ¹	Condition with respect to the PO process. (e.g., 0- Open, 1- In use, 2- Closed)	Int (0,1,2,4,5)
AssignedTo ¹	User specified for transaction.	String
DocId	Document identification number.	String
POSource	Origin of a Purchase Order(PO).	String
TransType ¹	Different type of transactions in a business logic.	Int
TranUser	User related to a specific transaction.	String
TranDate ¹	Date of transaction process.	Datetime
Reference	Unique identifier assigned to a transaction.	Int
Carrier	Business identification number used for delivery.	String
InfoRecordId	Database field made up of auto-generated values.	Int (auto-generated)
InfoWarehouseId	Warehouse identification code/number.	String
InfoUsername	User related to a specific transaction.	String
InfoSeal ¹	Information related to a container seal to secure goods.	String
InfoStatus ¹	State or condition of the processed Purchase Order (PO).	Int
InfoContainer ¹	Identification code used to represent a specific truck container.	String
InfoTemperature	Information about container temperature.	Decimal (e.g., 2.34, 10.20)
InfoWayBillNumber ¹	Document issued by carrier to acknowledge possession of goods. Serves as receipt.	String
InfoTransDate	Date of transaction process.	String
InfoCreatedDate ¹	Transaction's date of creation.	Datetime
InfoPurchaseOrder	Binding document created by a buyer and presented to a seller. (e.g., PO-1234)	String
InfoCarrierId ¹	Business identification number used for delivery.	String
InfoComment	Additional text field.	String
VendorRecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
VendorId ¹	Vendor's identification number.	String
VendorName ¹	Vendor's full name.	String

Field Name	Description	Value
VendorContact	Vendor's contact name.	String
VendorVoicePhone	Vendor's contact phone number.	String
VendorFaxPhone	Vendor's fax number.	String
VendorAddress1 ¹	Place where the vendor is situated.	String
VendorAddress2	Extra information related to a Vendor's address.	String
VendorCity	Vendor's current city name.	String
VendorState	Vendor's current state.	String
VendorZipCode	Vendor's postal code.	String
VendorCountry	Vendor's current country.	String
VendorNote	Additional text related to a specific vendor.	String
VendorCreatedDate ¹	Vendor's date of creation.	Datetime
InfoUdf1 - InfoUdf10	Extra info defined field. Udf are used to add custom values. (Up to 10 fields))	String
VendorUdf1 - VendorUdf10	Vendor user defined field. Udf are used to add custom values. (Up to 10 fields))	String
Udf1 - Udf10	User defined field. Udf are used to add custom values. (Up to 10 fields))	String
CreatedDate ¹	Transaction's date of creation.	Datetime
Comment	Additional text field.	String
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)

RECEIVINGORDERDETAILOUT

ReceivingOrderDetailOut holds the list of items and quantities related to a specific transaction(PO).

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
InfoRecordId	Database field made up of auto-generated values.	Int (auto-generated)
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
PurchaseOrder ¹	Binding document created by a buyer and presented to a seller. (e.g., PO-1234)	String
Source ¹	Origin of a Purchase Order(PO).	String
Status	Condition with respect to the PO process. (e.g., 0- Open, 1- In use, 2- Closed)	Int (0,1,2,4,5)
LineNumber ¹	Particular sequence of product inside a Purchase Order.	Int
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
OrderedQuantity ¹	Amount of product ordered.	String
AdditionalQuantity ¹	Amount in excess of the original load.	Int
ActualQuantity ¹	Product amount received.	Int
UomId	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
OrderedWeight ¹	Product's weight amount ordered.	Decimal (e.g., 2.34, 10.20)
UomWeight ¹	Unit of measurement identification value for weighted products (e.g., LBS)	String
ActualWeight ¹	Weight amount received.	Decimal (e.g., 2.34, 10.20)
Created_date ¹	Transaction's date of creation.	Datetime
ProductionDate	Date of product production.	String
ExpirationDate	Date of product expiration.	Datetime
TranUser	User related to a specific transaction.	String
TranDate ¹	Date of transaction process.	Datetime
Comment	Extra information about the receiving process.	String
Udf1 - Udf10	User defined field. Udf are used to add custom values. (Up to 10 fields))	String

RECEIVINGHISTORYOUT

ReceivingHistoryOut shows specific details about every processed product inside a purchase order (e.g., who received a particular product from order *001*).

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
InfoRecordId	Database field made up of auto-generated values.	Int (auto-generated)
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
PurchaseOrder ¹	Binding document created by a buyer and presented to a seller. (e.g., PO-1234)	String
LineNumber ¹	Particular sequence of product inside a Purchase Order.	Int
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
UomId	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
Weight	Heaviness of a specific product.	Decimal (e.g., 10.05, 0.00)
UomWeight ¹	Unit of measurement identification value for weighted products (e.g., LBS)	String
Quantity	Amount received.	String
LocationID ¹	Physical place where your inventory will exist. (e.g., 01A01B)	String
PalletID	Pallet Identification number. (P01234)	String
LotID	Identification number assigned to a particular quantity.	String
ProductionDate ¹	Date of product production.	String
ExpirationDate	Date of product expiration.	Datetime
TranUser	User related to a specific transaction.	String
SerialID	Unique number used for identification and inventory purposes.	String
TranDate ¹	Date of transaction process.	Datetime

SHIPPINGORDEROUT

When a sales order is closed using WDCS, then it can be shipped to the customer address. This process is tracked using *ShippingOrderOut*.

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
PickingOrderRecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
InfoRecordId	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
SalesOrder ¹	Commercial document prepared by a seller and issued to a customer. (e.g., SO-123)	String
TripId	Route identification number.	String
Carrier	Business identification number used for delivery.	String
TrackingId	Unique number assigned to a package when it is shipped.	String
HeaderRecordId	Database field made up of auto-generated values.	Int (auto-generated)
HeaderDockId	Location where vehicles are loaded and unloaded. Identification number	String
HeaderSeal	Related to a container seal to secure goods.	String
HeaderTruckId	Truck Identification number.	String
HeaderTransUser	User related to a specific transaction.	String
HeaderCreateDate	Transaction's date of creation.	Datetime
InfoCreateDate ¹	Transaction's date of creation.	Datetime
POReferenceNumber	Unique identifier assigned to a Purchase Order.	String
BillToCustomer*	Customer to send the products or services.	String
SOCustomerBillTo	Party responsible for paying for a service or product.	String
SOCustomerShipTo	Customer to send the products or services.	String
SOWave	Coordinate number for picking with shipping schedules.	String
SOFreight	Goods transported in bulk.	String
SOSalesOrderSequence ¹	Preset sequence of Sales Order (SO) in the Picking process	Int
SOComment	Additional text field.	String
SOMiscCharge	Charges added to order documents for costs other than for items purchased.	Decimal (e.g., 2.34, 10.20)
SOOrderDate ¹	Date when the order was processed and created.	Datetime
SOCharges	Amount of money paid for a good or service.	Decimal (e.g., 2.34, 10.20)
SODiscount	Deduction from the actual cost.	Decimal (e.g., 2.34, 10.20)
SONotes	Additional information about the Sales Order (SO).	String
SODueDate	Date by which the transaction must be completed.	Datetime
SOCarrierId	Business identification number used for delivery.	String
SOSalesman	Seller assigned to the transaction.	String

Field Name	Description	Value
SORouteId	Identification number used for fleets delivering goods.	String
BillToRecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
BillToClass	Identification text used to define how customers are billed.	String
BillToCompanyName ¹	Customer Bill To full name.	String
BillToContact	Customer Bill To contact name.	String
BillToVoicePhone	Customer Bill To contact phone number.	String
BillToFaxPhone	Customer Bill To fax number.	String
BillToAddress1 ¹	Place where the Customer is situated.	String
BillToAddress2	Extra information related to a Customer's address.	String
BillToCity	Customer Bill To current city name.	String
BillToState	Customer Bill To current state.	String
BillToZipCode	Customer Bill To postal code.	String
BillToCountry	Customer Bill To current country.	String
BillToNote	Additional text related to a specific Customer.	String
BillToRoute	Custom route directions.	String
BillToInventoryHandling ¹	Warehouse used for the picking process.	String
BillToNote	Extra notes used for customer related information.	String
BillToPayTerms	Conditions surrounding the payment part of a sale.	String
BillToPriority	Right of precedence over other customers.	String
BillToLocGroup ¹	Customer's location group identifier.	String
ShipToRecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
ShipToCompanyName ¹	Customer Ship To full name.	String
ShipToContact	Customer Ship To contact name.	String
ShipToVoicePhone	Customer Ship To contact phone number.	String
ShipToFaxPhone	Customer Ship To fax number.	String
ShipToAddress1 ¹	Place where the Customer is situated.	String
ShipToAddress2	Extra information related to a Customer's address.	String
ShipToCity	Customer Ship To current city name.	String
ShipToState	Customer Ship To current state.	String
ShipToZipCode	Customer Ship To postal code.	String
ShipToCountry	Customer Ship To current country.	String
ShipToNote	Additional text related to a specific Customer.	String
SOUdf1 - SOUdf10	Order's User defined fields. Udf are used to add custom values. (Up to 10 fields))	String
BillToUdf1 - BillToUdf10	Billing user defined field. Udf are used to add custom values. (Up to 10 fields))	String

Field Name	Description	Value
ShipToUdf1 - ShiptoUdf10	Shipping user defined field. Udf are used to add custom values. (Up to 10 fields))	String
TranUser	User related to a specific transaction.	String
TranDate ¹	Date of transaction process.	Datetime
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)

SHIPPINGORDERDETAILOUT

ShippingOrderDetailOut contains the list of items and quantities related to a sales order that will be shipped.

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
InfoRecordId	Database field made up of auto-generated values.	Int (auto-generated)
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
SalesOrder*	Commercial document prepared by a seller and issued to a customer. (e.g., SO-123)	String
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
UomId	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
Weight	Heaviness of a specific product.	Decimal (e.g., 10.05, 0.00)
UomWeight ¹	Unit of measurement identification value for weighted products (e.g., LBS)	String
Quantity ¹	Amount picked.	Int
LocationID ¹	Physical place where your inventory will exist. (e.g., 01A01B)	String
PalletID	Pallet Identification number. (P01234)	String
DockId	Location where vehicles are loaded and unloaded. Identification number	String
TrackingId	Unique number assigned to a package when it is shipped.	String
SerialID	Unique number used for identification and inventory purposes.	String
LotID	Identification number assigned to a particular quantity.	String
ProductionDate	Date of product production.	String
ExpirationDate	Date of product expiration.	Datetime
TranUser	User related to a specific transaction.	String
ReferenceNumber	Unique identifier assigned to a Sales Order product.	String
CreatedDate ¹	Transaction's date of creation.	Datetime
TranDate ¹	Date of transaction process.	Datetime

SHIPPINGHISTORYOUT

ShippingHistoryOut shows specific details about every processed product inside a sales order (e.g., when a product from order *001* was shipped).

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
InfoRecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
SalesOrder ¹	Commercial document prepared by a seller and issued to a customer. (e.g., SO-123)	String
LineNumber ¹	Particular sequence of product inside a Purchase Order.	Int
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
UomId	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
Weight	Heaviness of a specific product.	Decimal (e.g., 10.05, 0.00)
UomWeight ¹	Unit of measurement identification value for weighted products (e.g., LBS)	String
Quantity ¹	Amount shipped.	String
LocationID ¹	Physical place where your inventory will exist. (e.g., 01A01B)	String
PickingLocation	Default Picking Location.	String
PalletID	Pallet Identification number. (P01234)	String
SerialID	Unique number used for identification and inventory purposes.	String
LotID	Identification number assigned to a particular quantity.	String
ExpirationDate ¹	Date of product expiration.	Datetime
TranDate ¹	Date of transaction process.	Datetime
PickingPalletId	Pallet Identification Number used in the picking process.	String
TranUser	User related to a specific transaction.	String

RETURNSOUT

Products damaged or rejected by the customer are processed using our *Return* transaction inside the WDCS Console Client software. *ReturnsOut* is used to retrieve that kind of data.

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
SalesOrder ¹	Commercial document prepared by a seller and issued to a customer. (e.g., SO-123)	String
RefShippingNumber	Reference Shipping number.	String
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
UomId	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
Weight	Heaviness of a specific product.	Decimal (e.g., 10.05, 0.00)
UomWeight	Unit of measurement identification value for weighted products (e.g., LBS)	String
LotID	Identification number assigned to a particular quantity.	String
Quantity ¹	Amount returned.	Int
LocationID ¹	Physical place where your inventory will exist. (e.g., 01A01B)	String
SerialID	Unique number used for identification and inventory purposes.	String
ProductionDate ¹	Date of product production.	String
ExpirationDate	Date of product expiration.	Datetime
TranDate ¹	Date of transaction process.	Datetime
TranUser	User related to a specific transaction.	String
Comment	Additional text field.	String
ReasonId	Reason Code Identification number.	String
Reason	Reason Code description text.	String

INVENTORYADJUSTMENTOUT

Inventory additions, subtractions, and transfers are key transactions to maintain inventory levels accurately. The result of every single transaction involving each of the methods mentioned above will appear in *ReturnsOut*.

Field Name	Description	Value
Id ¹	Identity is a database field made up of auto-generated values.	Int (auto-generated)
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
SerialId	Unique number used for identification and inventory purposes.	String
ReasonId	Reason Code Identification number.	String
WarehouseId ¹	Warehouse identification code/number.	String
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
ItemAlternateNum	Alternative identification code/number.	String
ItemUsesSerial ¹	Verifies if an item requires Serial Number identification.	Int (0,1)
ItemUPC ¹	Universal product code. (e.g., ISBN book barcode)	String
ItemUomDesc	Written representation of an unit of measurement value.	String
ItemMaxWeight ¹	Product maximum weight capacity.	Decimal (e.g., 2.34, 10.20)
ItemReqPallet	Verifies if an item requires pallet (flat transport structure).	Int (0,1)
ItemValidExpDays ¹	Amount of days before a product expires.	Int
ItemRecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
ItemType	Set of common specific characteristics in products.	String
ItemUomType ¹	Unit of measurement type. (e.g., 1 for weighted items. Else, use 0.)	Int (0,1)
ItemExpirationOffset ¹	Days to expire after being received and added to virtual inventory.	Int (deprecated field)
ItemPickingUom	Unit of measurement used for picking. (e.g., Each, PQ3, DZ12)	String
ItemMinAvailableQuantity	Minimum amount needed to keep a product inventory level.	Int
ItemReqLot ¹	Verifies if an item requires Lot Number identification.	Int (0,1)
ItemReqProdDate ¹	Verifies if an item requires a Production Date value.	Int (0,1)
ItemReqExpDate ¹	Verifies if an item requires an Expiration Date value.	Int (0,1)
ItemCreatedDate ¹	Transaction's date of creation.	Datetime
ItemDescription ¹	Written representation of a product.	String
ItemCategory	Class with shared characteristics. (e.g., food, cosmetics, sauce)	String
ItemCube	Amount of the total available space that is actually utilized.	Decimal (95.4, 37.2)
ItemFullPalletQty ¹	Maximum amount used to fill a pallet platform. (depends on the item)	Int
ItemWeight	Heaviness of a specific product.	Decimal (e.g., 10.05, 0.00)
ItemMinAvailableWeight	Minimum weight amount required before warning.	Decimal (e.g., 7.51, 0.20)
ItemBrand	Product manufactured by a particular company under a particular name.	String
ItemComment	Additional notes about a product.	String

Field Name	Description	Value
ItemItemPrimaryLoc	Product primary Warehouse location. (e.g., MainWarehouseId123)	String
ItemCaseQtyDesc	Description for number of boxes manufactured.	String
ItemMinWeight ¹	Product minimum weight capacity.	Decimal (e.g., 6.534, 6.204)
ItemPutAwayLocGroup	Location group for put away transactions.	String
ProductionDate	Date of product production.	String
Weight	Heaviness of a specific product.	Decimal (e.g., 10.05, 0.00)
UomWeight ¹	Unit of measurement identification value for weighted products (e.g., LBS)	String
ReasonDescription	Heaviness of a specific product.	Decimal (e.g., 10.05, 0.00)
TranUser	User related to a specific transaction.	String
Comment	Additional notes about a product.	String
Quantity	Amount adjusted.	String
TranDate ¹	Date of transaction process.	Datetime
LocationID ¹	Physical place where your inventory will exist. (e.g., 01A01B)	String
PalletID	Pallet Identification number. (P01234)	String
UomId	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
ExpirationDate ¹	Date of product expiration.	Datetime
LotID	Identification number assigned to a particular quantity.	String
ReasonRecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
ReasonStatus ¹	Condition with respect to the Reason Codes.	Int
ReasonType ¹	Describes the functionality of the Reason Code. Default value is 1	Int(1)
ReasonCreatedDate ¹	Reason Code's date of creation.	Datetime
CreatedDate ¹	Transaction's date of creation.	Datetime
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)
ItemUdf1 - ItemUdf10	Item's User defined field. Udf are used to add custom values. (Up to 10 fields))	String
ReasonUdf1 - ReasonUdf10	Reason's User defined field. Udf are used to add custom values. (Up to 10 fields))	String

INVENTORYSUMMARYOUT

InventorySummaryOut store a copy of the current inventory levels. It is updated using the *WDCS/ERP Link Interface* and the *syncID* serves as a reference number to differentiate between inventory snapshots.

Field Name	Description	Value
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
SyncId ¹	Auto-generated value which contains inventory summary datetime.	String
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
UomId	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
OnHandQuantity ¹	Current inventory quantity.	Int
Weight	Heaviness of a specific product.	Decimal (e.g., 10.05, 0.00)
UomWeight	Unit of measurement identification value for weighted products (e.g., LBS)	String
LotID	Identification number assigned to a particular quantity.	String
ExpirationDate	Date of product expiration.	Datetime
InvStatus	Verifies current Inventory status (e.g., if available: I, else: P)	String
QaStatus ¹	Quality assurance status. (e.g., default value is 3)	Int(3)
CreatedDate ¹	Transaction's date of creation.	Datetime
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)

CYCLECOUNTINVENTORYOUT

Cycle Counts reduce and often eliminate the need for annual Physical Counts. It gives the advantage that you can count by groups of locations or items regularly. *CycleCountInventoryOut* holds the data from previous cycle inventory counts.

Field Name	Description	Value
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
SyncId ¹	Auto-generated value which contains the Cycle Count datetime.	String
Request ¹	Cycle Count Identification number.	Int (auto-generated)
Iteration ¹	Identification number related to the repetitions created during the Cycle Count.	Int (1,2,3)
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
LocationID ¹	Physical place where your inventory will exist. (e.g., 01A01B)	String
CountQuantity ¹	Amount of product counted during Cycle Count iteration.	Int
SerialID	Unique number used for identification and inventory purposes.	String
Status	Condition with respect to the Cycle Count process. (e.g., 2 - closed count)	Int
UomWeight ¹	Unit of measurement identification value for weighted products (e.g., LBS)	String
LotID	Identification number assigned to a particular quantity.	String
PalletID	Pallet Identification number. (P01234)	String
UomId ¹	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
ExpirationDate	Date of product expiration.	Datetime
CountWeight	Amount of weight counted.	Decimal(12.40, 4.56754)
TranDate ¹	Date of transaction process.	Datetime

WORKDETAILIN

WorkDetailIn contains the list of items and quantities related to a WorkOrder that will be Received from production.

Field Name	Description	Value
WarehouseId ¹	Warehouse identification code/number.	String
WorkOrder	Commercial document prepared by production and issued to a warehouse. (e.g., WO-001)	String
LineNumber ¹	Particular sequence of product inside a Purchase Order.	Int
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
UomId	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
SerialID	Unique number used for identification and inventory purposes.	String
LotID	Identification number assigned to a particular quantity.	String
ExpirationDate	Date of product expiration.	Datetime
ProductionDate ¹	Date of product production.	String
OrderedQuantity ¹	Amount of product ordered.	String
ActualQuantity ¹	Product amount received.	Int
AdditionalQuantity ¹	Amount in excess of the original load.	Int
LocationID ¹	Physical place where your inventory will exist. (e.g., 01A01B)	String
TransDate ¹	Date of transaction process.	Datetime
TransUser	User related to a specific transaction.	String
Status	Condition with respect to the PO process. (e.g., 0- Open, 1- In use, 2- Closed)	Int (0,1,2,4,5)
OrderedWeight ¹	Product's weight amount ordered.	Decimal (e.g., 2.34, 10.20)
ActualWeight ¹	Weight amount received.	Decimal (e.g., 2.34, 10.20)
UomWeight ¹	Unit of measurement identification value for weighted products (e.g., LBS)	String
Comment	Extra information about the receiving process.	String
CreatedDate ¹	Transaction's date of creation.	Datetime
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
Udf1 - Udf10	User defined field. Udf are used to add custom values. (Up to 10 fields)	String
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)
ExportMessage	Text description used in export transactions. (e.g., Item exported successfully.)	String

WORKDETAILSERIALIN

WorkDetailSerialin retrieves all the details from the products produce. It stores the Serial ID and unit of measurements. Every order must contain at least one product in *WorkDetailIn* table to be processed.

Field Name	Description	Value
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
WorkOrder	Commercial document prepared by production and issued to a warehouse. (e.g., WO-001)	String
LineNumber ¹	Particular sequence of product inside a Purchase Order.	Int
ItemId ¹	Product identification number. (e.g., stock keeping unit(SKU))	String
SerialID	Unique number used for identification and inventory purposes.	String
UomId	Unit of measurement identification value. (e.g., EACH, CJ14, PQ3)	String
LotID	Identification number assigned to a particular quantity.	String
Quantity	Amount adjusted.	String
Weight	Heaviness of a specific product.	Decimal (e.g., 10.05, 0.00)
UomWeight ¹	Unit of measurement identification value for weighted products (e.g., LBS)	String
ExpirationDate	Date of product expiration.	Datetime
ProductionDate ¹	Date of product production.	String
SourceLocationId	Physical place where your production comes from.	string
LocationID ¹	Physical place where your inventory will exist. (e.g., 01A01B)	String
PalletID	Pallet Identification number. (P01234)	String
ReferenceNumber	Unique identifier assigned to a WorkOrder.	String
TransDate ¹	Date of transaction process.	Datetime
CreatedDate ¹	Transaction's date of creation.	Datetime
Udf1 - Udf3	User defined field. Udf are used to add custom values. (Up to 10 fields))	String
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)
ExportMessage	Text description used in export transactions. (e.g., Item exported successfully.)	String

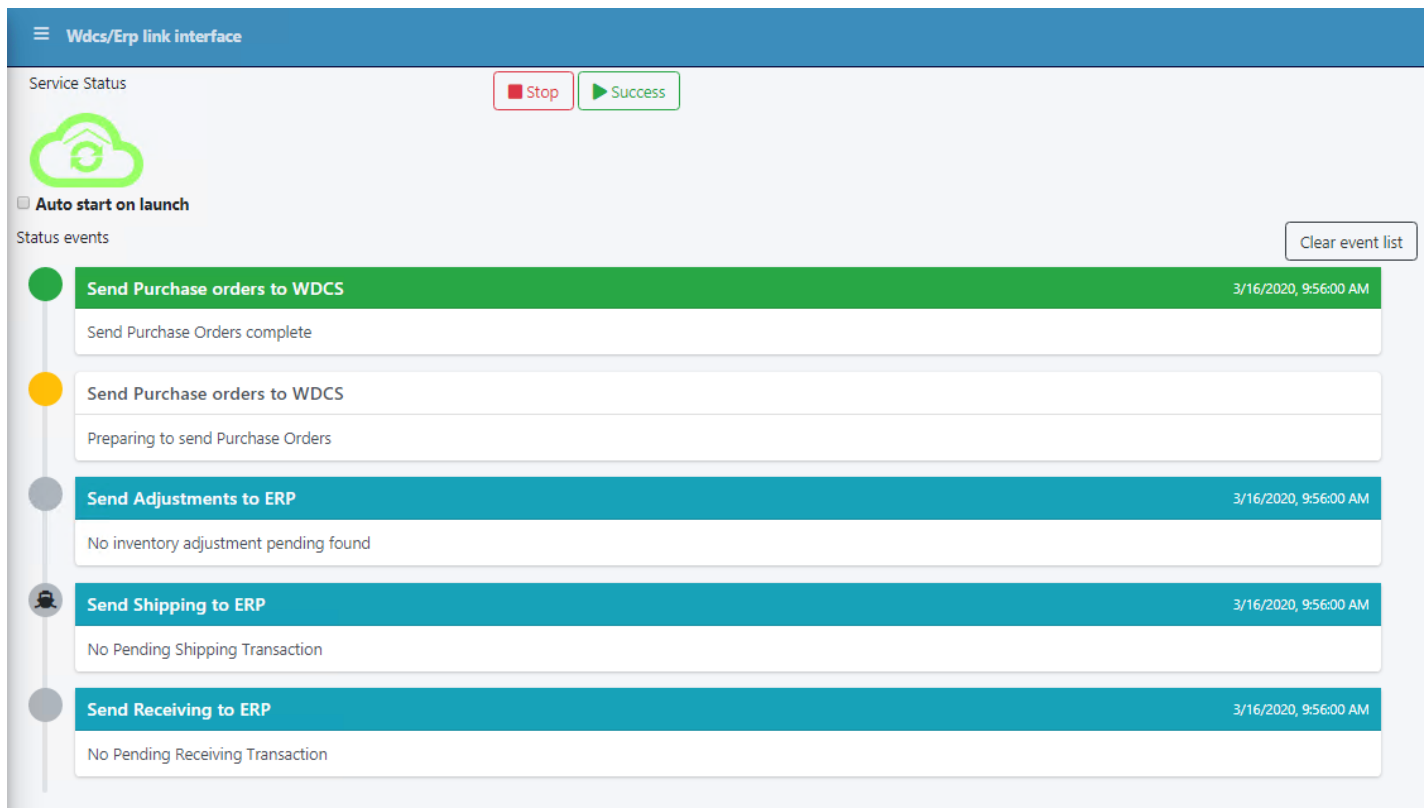
WORKORDERIN

Refers to the process of receiving and handling goods or products that have been produced internally within the organization or facility. ("Receiving from production")

Field Name	Description	Value
RecordId ¹	Database field made up of auto-generated values.	Int (auto-generated)
WarehouseId ¹	Warehouse identification code/number.	String
WorkOrder	Commercial document prepared by production and issued to a warehouse. (e.g., WO-001)	String
Status	Condition with respect to the PO process. (e.g., 0- Open, 1- In use, 2- Closed)	Int (0,1,2,4,5)
TranUser	User related to a specific transaction.	String
OrderDate ¹	Date when the order was processed and created.	Datetime
DueDate ¹	Date by which the transaction must be completed.	Datetime
TransType ¹	Different type of transactions in a business logic.	Int
TranDate ¹	Date of transaction process.	Datetime
IssueOrder		
ExportStatus ¹	State with respect to the export process. (0: Pending, 1: Processed, 3: Error)	Int (0,1,3)
Comment	Extra information about the receiving process.	String
Type	Set of common specific characteristics in products.	String
CreatedDate ¹	Transaction's date of creation.	Datetime
Udf1 - Udf10	User defined field. Udf are used to add custom values. (Up to 10 fields))	String
ExportMessage	Text description used in export transactions. (e.g., Item exported successfully.)	String

¹ Required Field.

4.3 WDCS/ERP Link Installation



How to Install/Setup WDCS/ERP Link Interface:

1. Unzip the compressed WDCS_Connector.zip folder
2. Navigate to the Publish Folder
3. Open the WdcsConnector.exe
 - This will open a browser windows at localhost:21905
4. Follow the WDCS/ERP Link Interface Settings configuration.

WDCS/ERP Link Interface as a Service

Additionally, the WDCS/ERP Link Interface can run as a *Windows Service*.

To run as a service:

1. Open Command Prompt(CMD)
2. Copy and paste the following code: `sc create wdcssync binPath= "[INSERT_HERE_YOUR_FILEPATH_T0]\WdcsConnector.exe --service" DisplayName= "WDCS/ERP Link Interface" start= auto`
 - **binPath=** "" is the file path where *WdcsConnector.exe* is located
 - **--service** is needed to be registered as a Service
 - **DisplayName** is the name that will appear at *Services*
 - **start=** can be set to *auto* or *manual* initialization
3. Verify by browsing localhost:21905

4.4 WDCS/ERP Link Settings

☰
Wdcs/Erp link interface

Settings Parameters for cloud link

Server Configuration

Local Server Name

Company

Warehouse Id to sync

Server Url

Username

Password

Saving changes will overwrite password as well. Must use a valid password when saving changes.

Save

Job Schedule

Description	Minute	Hour	Day Of Month	Month	Day of Week	Tasks
-------------	--------	------	--------------	-------	-------------	-------

4.4.1 Server Configuration

Before initializing the WDCS/ERP Link Interface, please setup the server configuration settings. This is needed to be able to transfer data between WDCS and the ERP. The information required includes:

- Server Id (Database Server Name)
- Company Name
- Warehouse ID (Warehouse to Sync)
- Server Url (Warehouse Integrator Portal (Wip))
- Server username (Wip)
- Server password (Wip)

Job Schedule

One of the most essential tools found in the WDCS/ERP Link Interface is the ability to automate all WDCS Transactions.

Description	Minute	Hour	Day Of Month	Month	Day of Week	Tasks
Upload PO/SO every minute to Cloud	0/1	*	*	*	?	Send Purchase orders to WDCS,Send Sales Orders to WDCS
Send Receiving, Shipping, Returns and Adjustments to ERP	0/1	*	*	*	?	Send Receiving to ERP,Send Shipping to ERP,Send Adjustments to ERP>Returns
Send Customer and Vendors to ERP every day at 12.	0	12	*	*	?	Send Vendors to WDCS,Send Customers to WDCS
Send Items to ERP	0/5	*	*	*	?	Send Items to WDCS

As shown above, every scheduled task will appear under the **Job Schedule** section. Each task must include the description and schedule time of the task. It is possible to add multiple tasks under the same schedule group.

4.4.2 ERP Configuration

After setting up the database server configuration, the next step is to configure the ERP settings. Depending on the ERP, the required fields may vary from one system to the other.

SAP Business One ERP Configuration

The required fields for the SAP Business One ERP include:

- ERP Connection String
- Username
- Password
- Host Server
- Host License Server
- DB Server Username
- DB Server Password
- Host Company

Name	Version
SAP Business One Release	9.2 or higher
DI-API /DI Server	DI API 90
Database Systems	MS SQL Server 2008 or higher

SQL Server Offline Configuration

The only required field is the connection string to access the SQL Database where data will be transfer to/from WDACS.

Wdcs/Erp link interface

Settings Parameters for Erp

Sql Server connection string

+

Sql Server Data Source

Data Source=192.168.0.0;Initial Catalog=WDCS_Database_Name;Persist Security Info=True;User ID=JamesSmith;Password=Test123pass

Saving changes will overwrite existing settings

Save

4.5 WDCS/ERP Link Interface

The WDCS/ERP Link Interface serves as a bridge between WDCS and multiple Enterprise Resource Planning (ERP) services. The WDCS Connector has the ability to automatically share transactions such as *Item Master*, *purchase* and *sales order*, *customer* and *Inventory data*, among others, to/from the ERP.

The screenshot displays the WDCS/ERP link interface dashboard. At the top, there is a blue header with the title 'Wdcs/Erp link interface'. Below the header, the 'Service Status' section features a green cloud icon with a house and a circular arrow, and two buttons: a red 'Stop' button and a green 'Success' button. A checkbox labeled 'Auto start on launch' is present. The 'Status events' section includes a 'Clear event list' button and a vertical timeline of events. The events are as follows:

Event Title	Description	Timestamp
Send Purchase orders to WDCS	Send Purchase Orders complete	3/16/2020, 9:56:00 AM
Send Purchase orders to WDCS	Preparing to send Purchase Orders	
Send Adjustments to ERP	No inventory adjustment pending found	3/16/2020, 9:56:00 AM
Send Shipping to ERP	No Pending Shipping Transaction	3/16/2020, 9:56:00 AM
Send Receiving to ERP	No Pending Receiving Transaction	3/16/2020, 9:56:00 AM

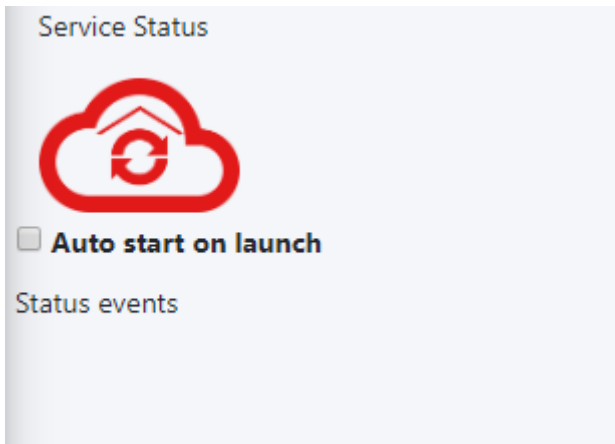
Once the WDCS ERP/Link Interface is initialized, the main screen is loaded. At the top of the screen, there are two buttons: **Success** and **Stop**. **Success** is used to synchronize the different transactions between WDCS and the ERP. **Stop** is used to prevent pending/future transactions from synchronizing.

Event List

While the transactions are being processed, they will appear on the dashboard screen, as shown above. The list contains multiple events, each with a title, description and color that is used to identify the status of a specific transaction. If there are no transaction in queue, the interface returns a message, telling the user that there are no pending transactions.

If a transaction was successfully processed, the system returns a event object. On the other hand, if there was a problem with the transaction, it also includes transaction-related information to help address the issue.

Cloud Symbol



Color	Status
Red	Sync Not Started
Green	Sync in Process
Yellow	Stopping Sync

On the left side, the *Service Status Cloud Symbol* is used to help the user to identify the current status of the interface. If the symbol color is **red**, it means that the synchronization between systems isn't actively running. If it's **green**, this means that the different transactions of our system are being synchronized. Finally, if the color is **yellow**, it means that the system is finishing synchronizing a transaction, but once finished, it will not execute the rest of the pending transactions, turning back to **red**.

Under the cloud symbol, there is an optional **Auto Launch** checkbox, which lets the user automatically synchronize transactions when the interface starts, without clicking the **Success** button.

For more information on transactions, please visit [The WDCS Sync Menu](#).

4.6 WDCS/ERP Sync Menu

In the synchronization menu, the transactions are divided into two groups:

1. Transactions that send information from the ERP to WDCS
2. Transactions that send information back from WDCS to the ERP

Manual Single Sync
Partially sync with cloud. Append a sync transaction to be executed.

Sends Information to the Cloud

Send local ERP info to WDCS cloud

Customers, Items, Vendors, Purchase Orders, Sales Orders, Quick Purchase Orders, Quick Sales Orders, Purchase Orders By Date, Sales Orders By Date

Receives from Cloud to Local ERP

Gets info from WDCS and update local ERP. Completed transactions from the cloud will be imported to the local ERP. Proceed with caution

Receiving, Shipping, Adjustments, Inventory Summary, Inventory Count

info - Action queue do not show scheduled tasks for sync.

#	Task
---	------

From ERP to WDCS

The information that is sent from the Enterprise Resource Planning(ERP) to WDCS includes:

- Customers
- Vendors
- Purchase Orders
- Sales Orders
- Items


From WDCS to ERP

The information that is sent from WDCS back to the ERP includes:

- Receiving
- Shipping
- Adjustments
- Inventory Summary
- Inventory Count

Sync Process

Once the WDCS/ERP Link Interface has been initialized, to synchronize multiple transactions, select from the menu presented above. Regarding Sales and Purchases Orders, it is possible to choose between synching all the available data, using a date range or just the current day's data.

#	Task
1	Send Purchase orders to WDCS 

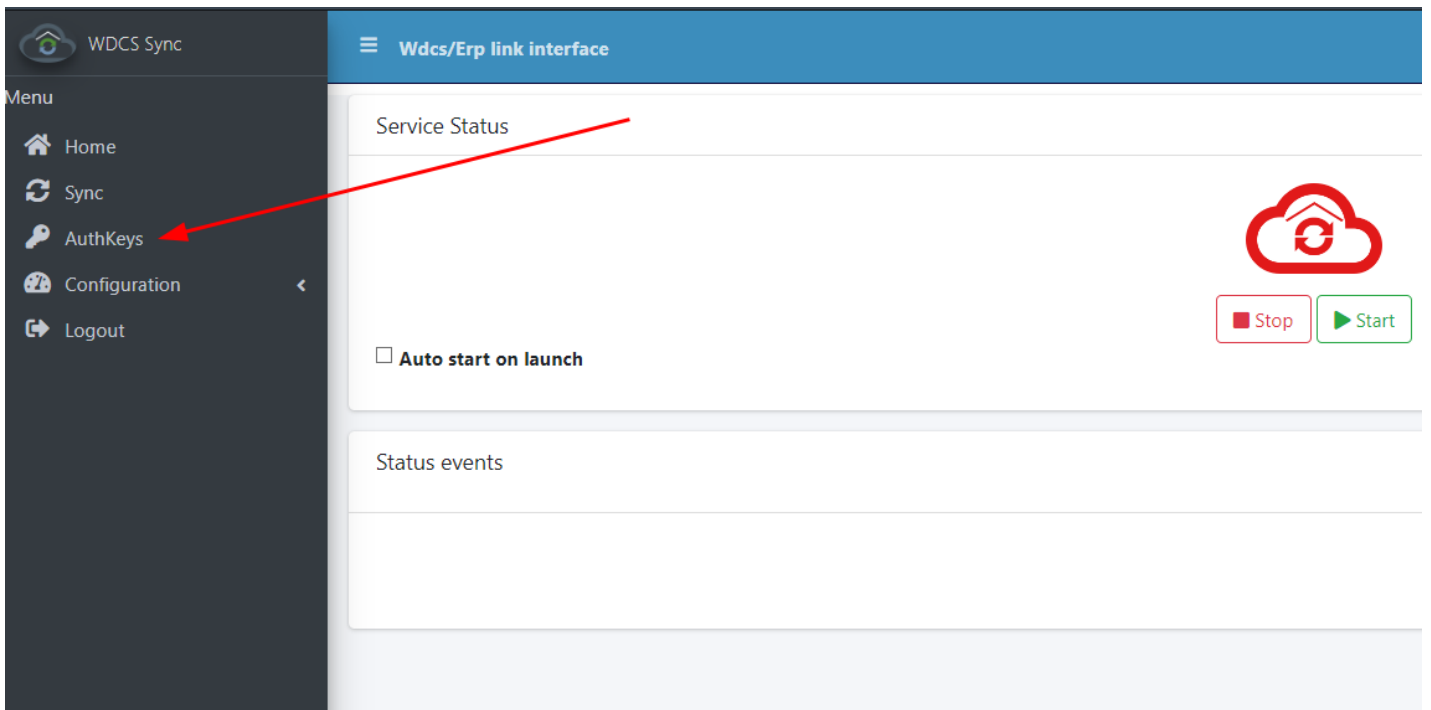
Once the transaction is selected it passes into a queue list until the interface proceeds to execute it. If automatization of synchronization tasks is needed, please refer to WDCS/ERP Link Interface Settings.

4.7 WDCS/ERP API Options & API Keys Dashboard.

WDCS has a built in api that can be used to add sync operation to the built in queue. That way you can use any app to integrate with the WDCS connector.

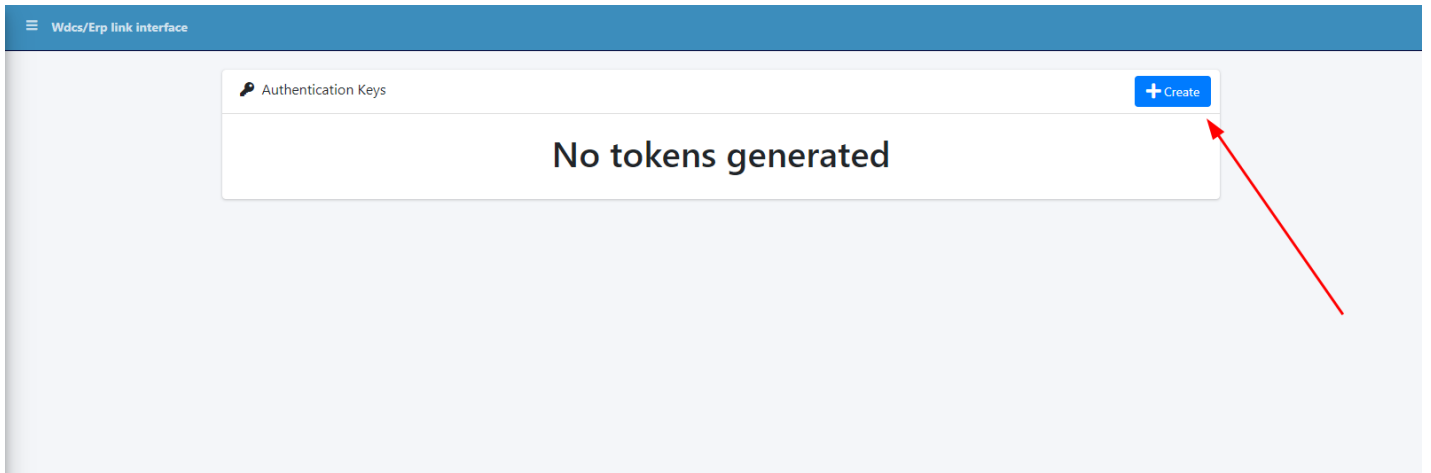
4.7.1 How to use the API

Navigate to the Auth Keys Dashboard.

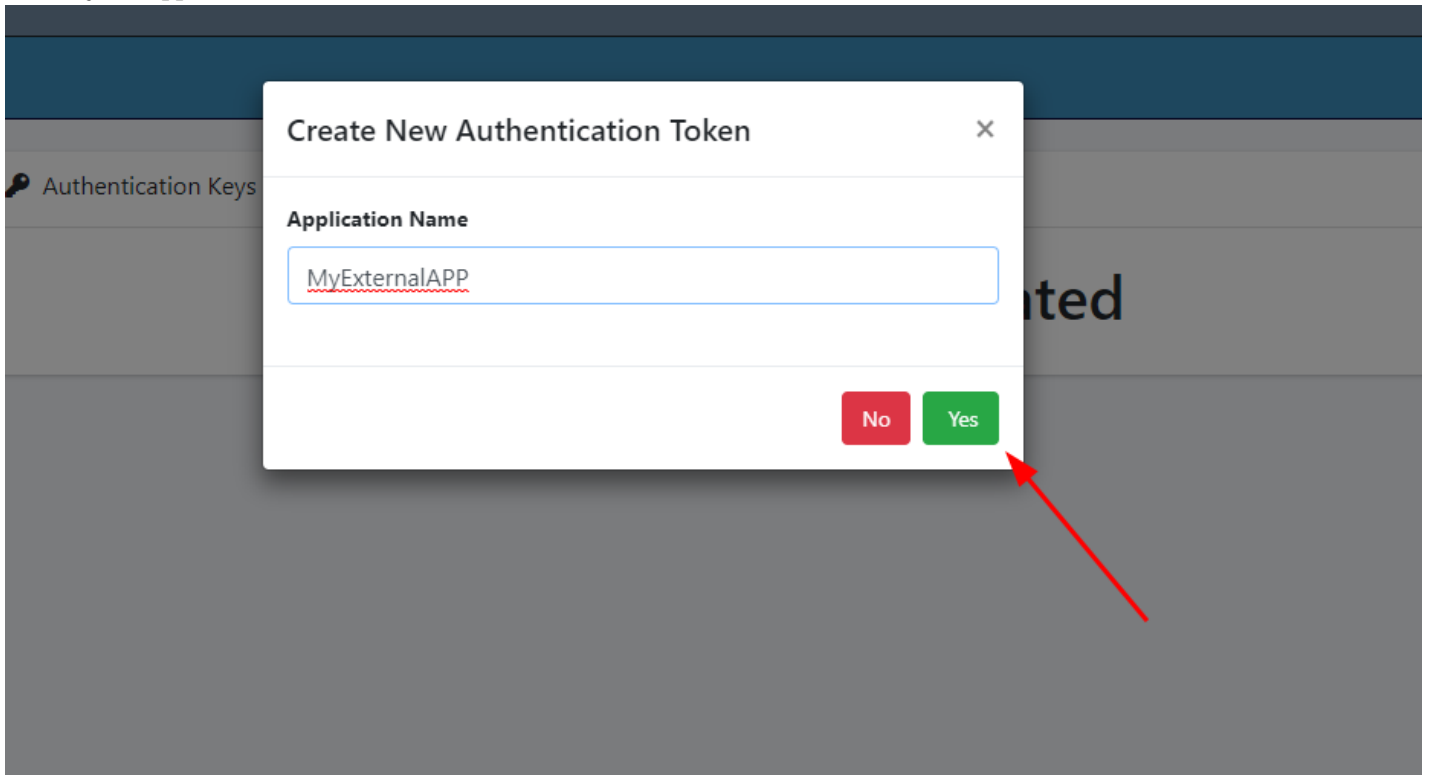


Generate the API key that will be used by the external app.

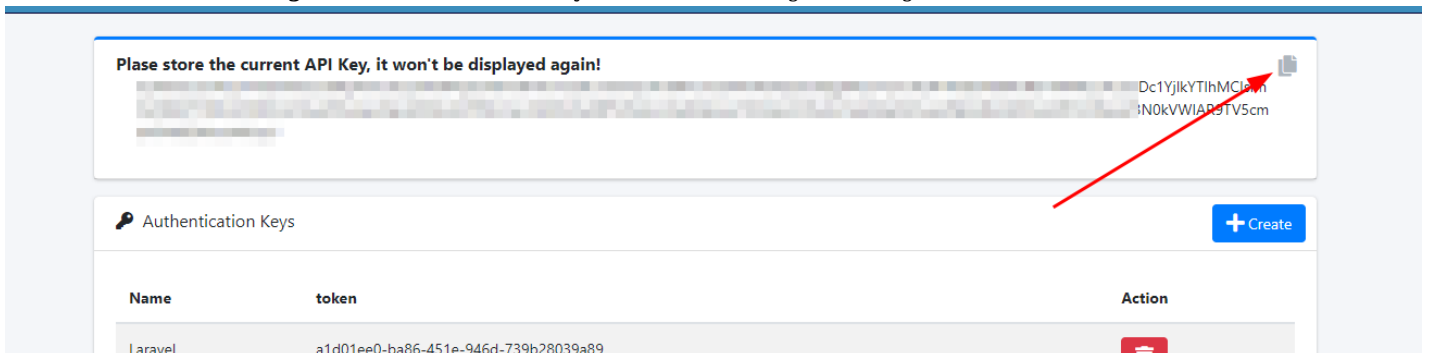
1. Click on the create Button.



2. Put your App name on for the token identifier.



3. Your token has been generated and it is ready to be used. Change this image



By clicking on the copy icon you add the token to your current paste bin.

Use your key to consume the api endpoints.

In order to consume/use the token you must pass it as an Bearer token in your HTTP Request Header.

Auth Header Example

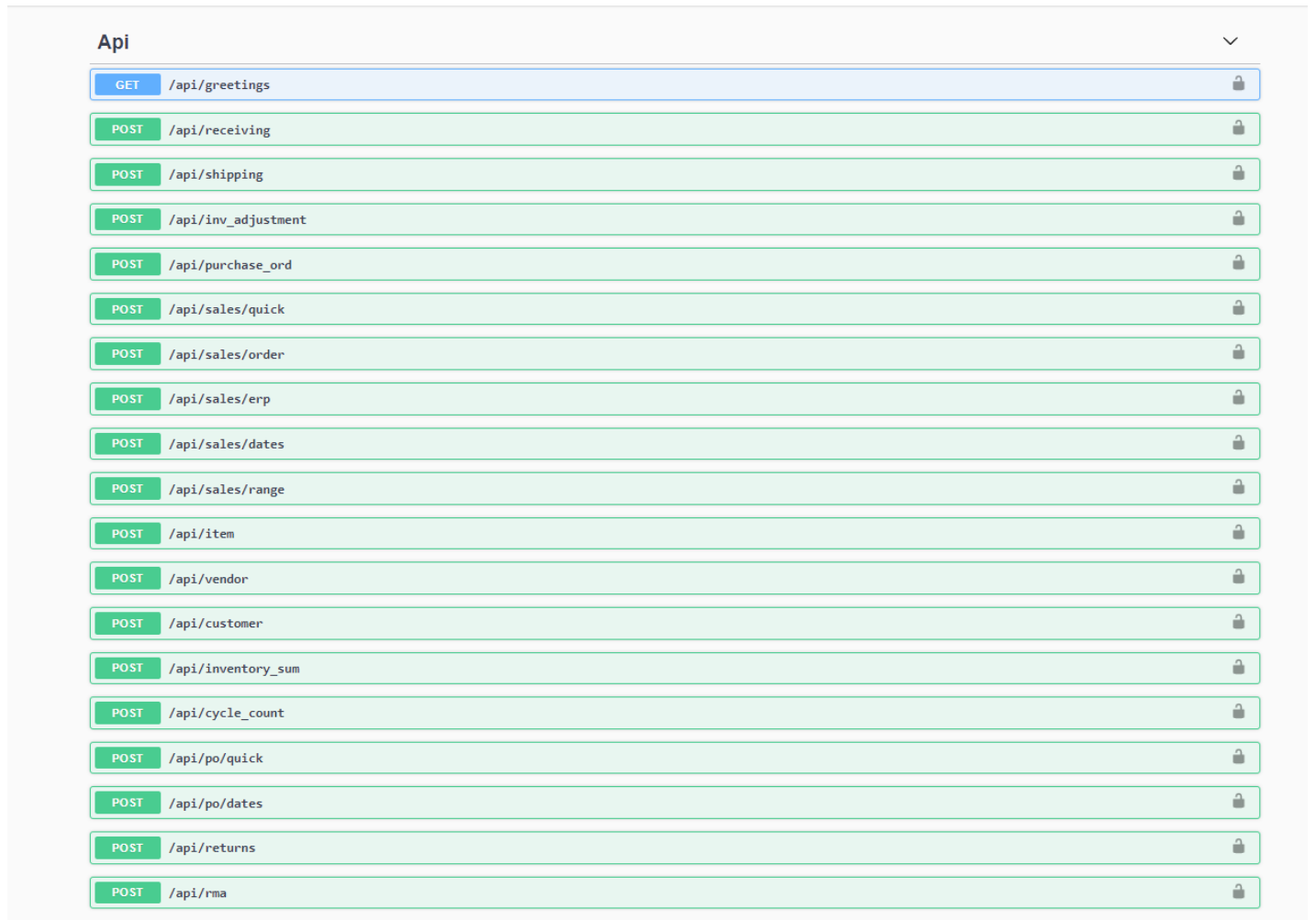
```
Accept: application/json
Authorization: Bearer
eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJkbWVpYm91ZiI6Im9tYXN0IiwiaWF0IjoiMTYxMjM0NTY3In0.eyJkbWVpYm91ZiI6Im9tYXN0IiwiaWF0IjoiMTYxMjM0NTY3In0.
```

The current token won't work for you! In order for this to work you need to create your own token in the dashboard.

Routes

To see all of our apis urls you may access our swagger docs in the following url.

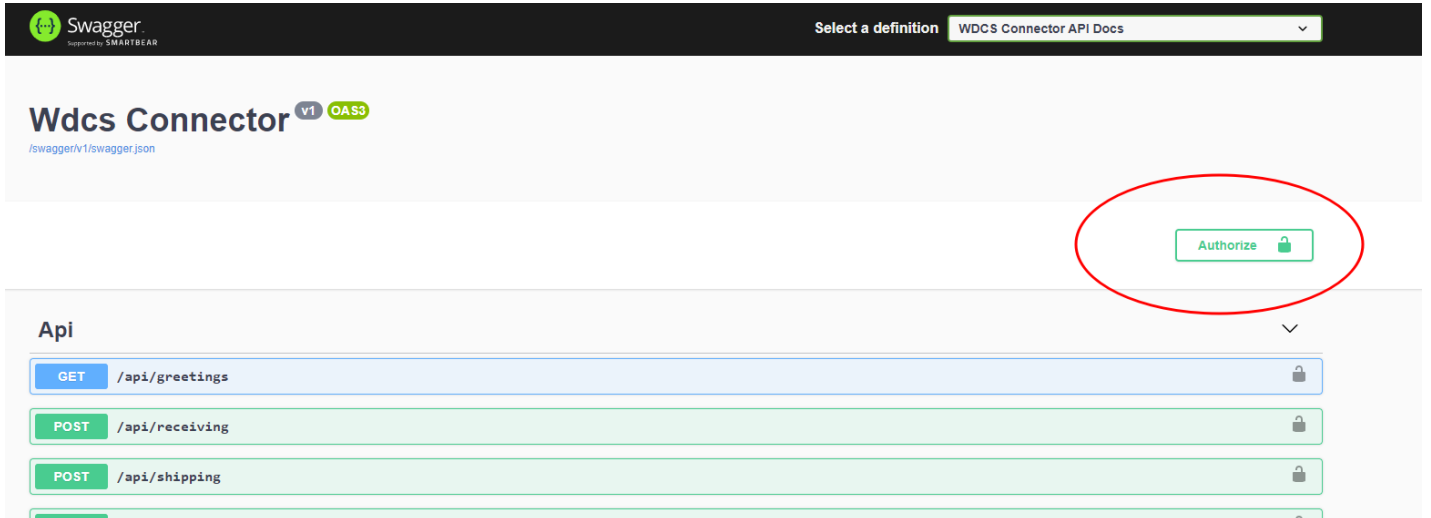
Swagger Docs

A screenshot of a Swagger API documentation interface. The title 'Api' is at the top left, and a dropdown arrow is at the top right. Below the title is a list of 18 API endpoints, each in a horizontal bar. The first bar is highlighted in light blue and shows 'GET /api/greetings' with a lock icon. The remaining 17 bars are light green and show 'POST' followed by various endpoint paths, each with a lock icon. The endpoints are: /api/receiving, /api/shipping, /api/inv_adjustment, /api/purchase_ord, /api/sales/quick, /api/sales/order, /api/sales/erp, /api/sales/dates, /api/sales/range, /api/item, /api/vendor, /api/customer, /api/inventory_sum, /api/cycle_count, /api/po/quick, /api/po/dates, /api/returns, and /api/rma.

Method	Endpoint	Lock
GET	/api/greetings	🔒
POST	/api/receiving	🔒
POST	/api/shipping	🔒
POST	/api/inv_adjustment	🔒
POST	/api/purchase_ord	🔒
POST	/api/sales/quick	🔒
POST	/api/sales/order	🔒
POST	/api/sales/erp	🔒
POST	/api/sales/dates	🔒
POST	/api/sales/range	🔒
POST	/api/item	🔒
POST	/api/vendor	🔒
POST	/api/customer	🔒
POST	/api/inventory_sum	🔒
POST	/api/cycle_count	🔒
POST	/api/po/quick	🔒
POST	/api/po/dates	🔒
POST	/api/returns	🔒
POST	/api/rma	🔒

TESTING API ENDPOINTS IN SWAGGER.

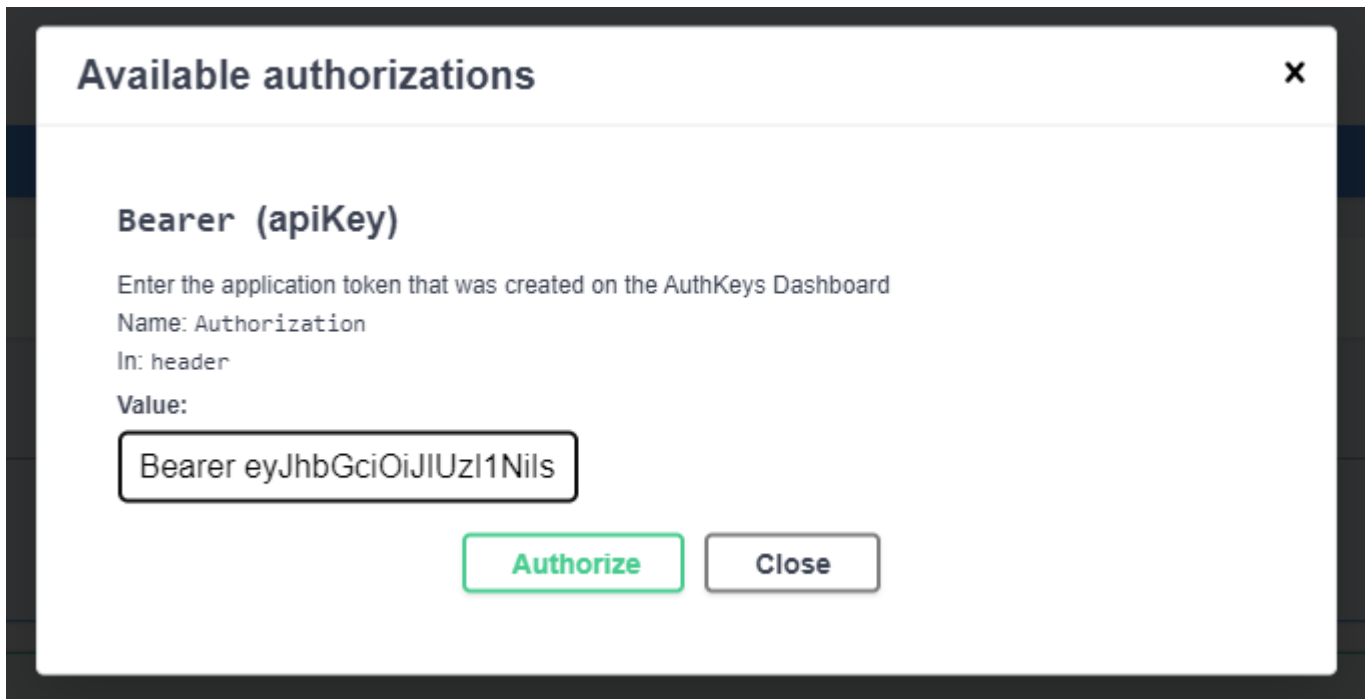
In order to test the api endpoints in swagger we first need to pass our generated token from the dashboard. To do so we need to click the authorize button on top of the swagger docs.



The image shows the Swagger UI interface for the WDCS Connector API. At the top, there is a header with the Swagger logo and the text "Supported by SMARTBEAR". To the right, there is a dropdown menu labeled "Select a definition" with "WDCS Connector API Docs" selected. Below the header, the main title is "Wdcs Connector" with version "v1" and "OAS3" tags. A link "/swagger/v1/swagger.json" is visible. On the right side, there is a green "Authorize" button with a lock icon, which is circled in red. Below the header, there is a section titled "Api" with a dropdown arrow. Underneath, there are three API endpoints listed: "GET /api/greetings", "POST /api/receiving", and "POST /api/shipping". Each endpoint has a lock icon on the right.

For our token to work with the documentation we need to pass the token like this.

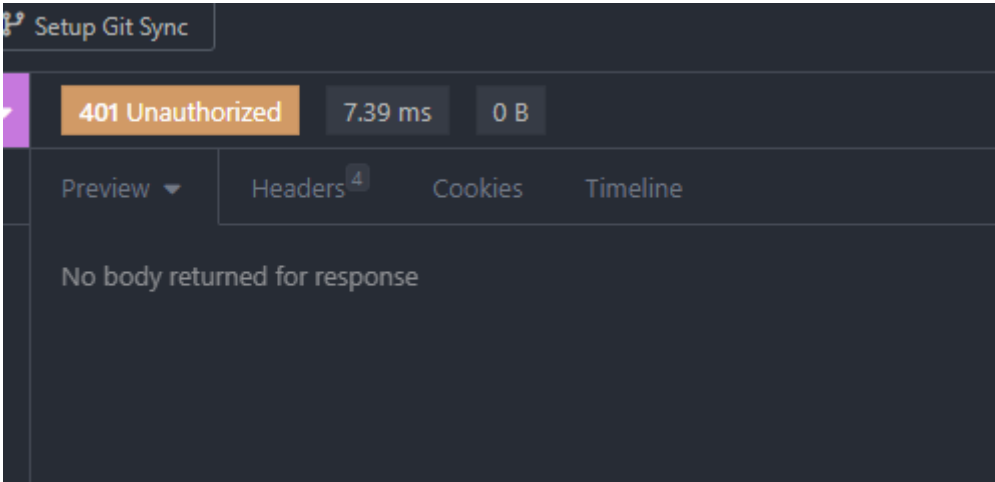
Bearer \$token



The image shows a dialog box titled "Available authorizations" with a close button (X) in the top right corner. The dialog contains the following text:

- Bearer (apiKey)**
- Enter the application token that was created on the AuthKeys Dashboard
- Name: Authorization
- In: header
- Value:

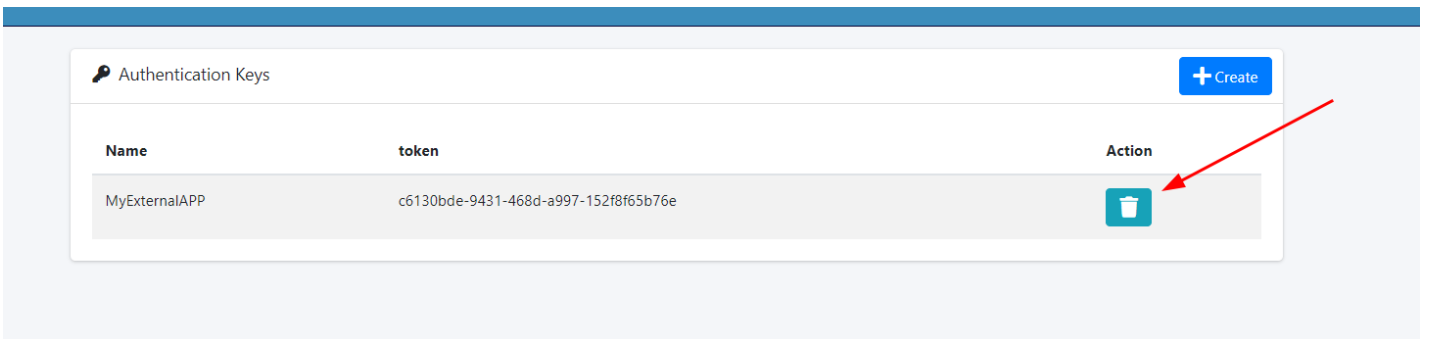
The value field contains the text "Bearer eyJhbGciOiJIUzI1NiIs". Below the value field, there are two buttons: "Authorize" (highlighted in green) and "Close".



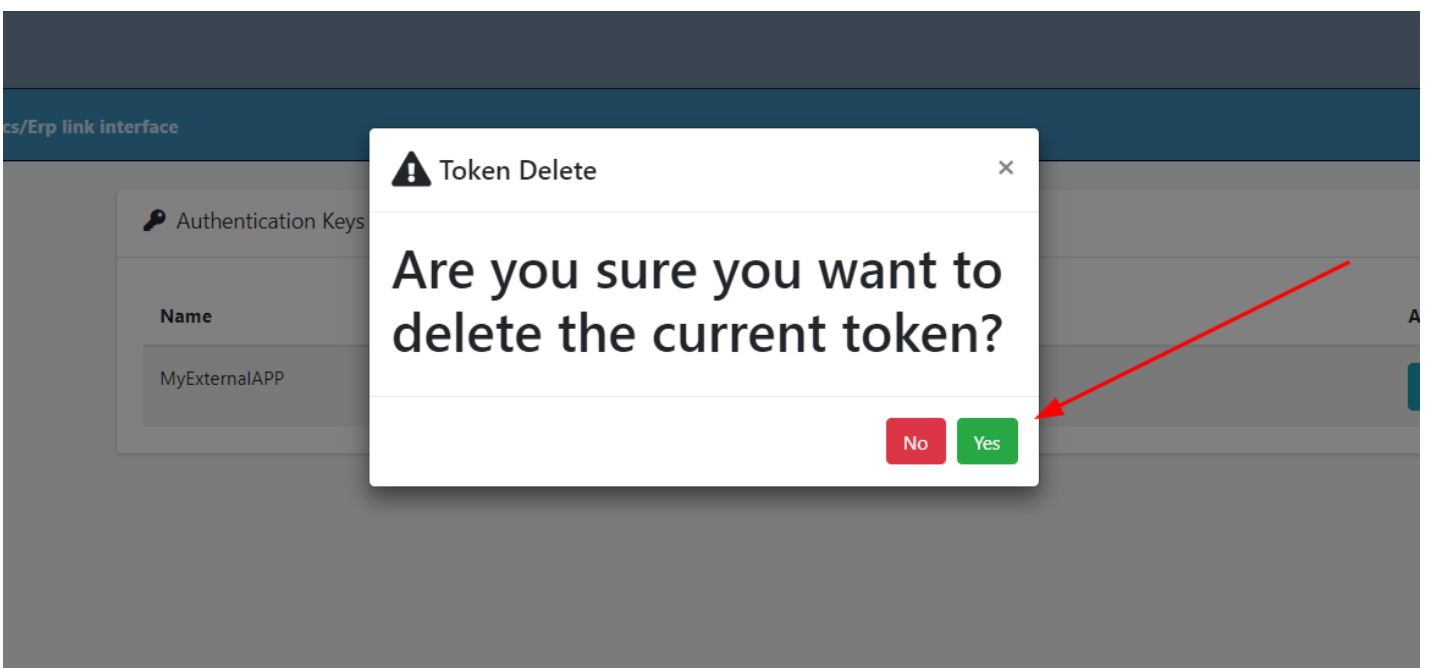
4.7.3 Revoke Authentication Token.

If you want to revoke an existing token you can simply delete the token in the dashboard.

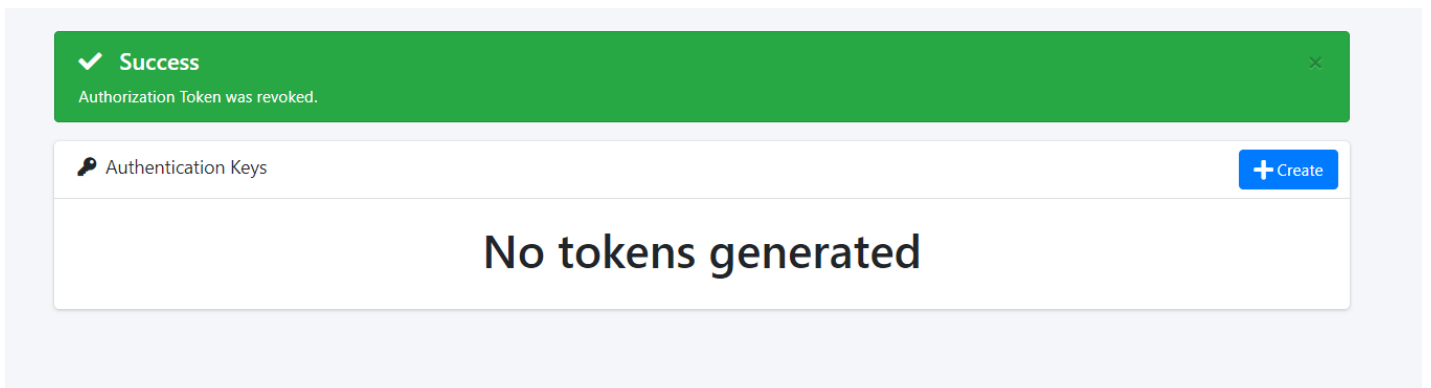
On the Auth Dashboard click on the trash icon.



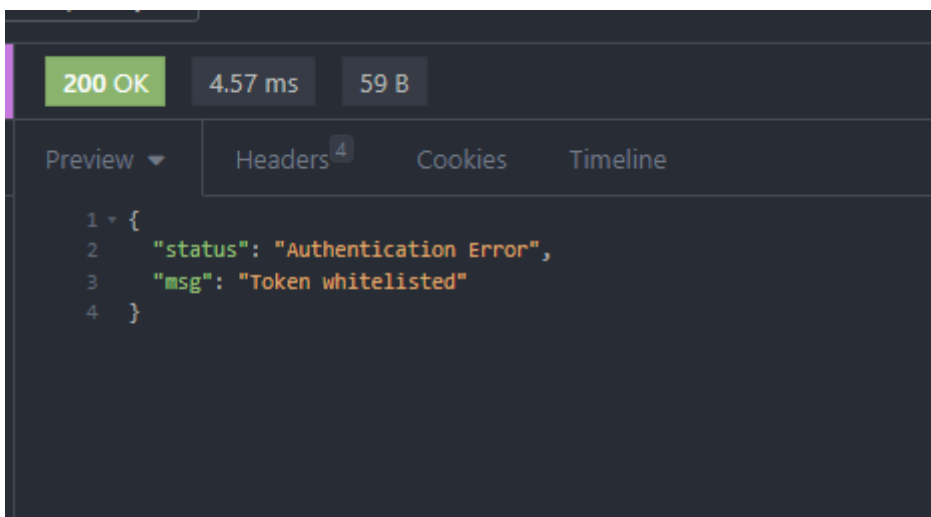
Confirm you want to delete the current token.



You have deleted a token.



Once the token is deleted, it can't be used again. The token will no longer be valid.



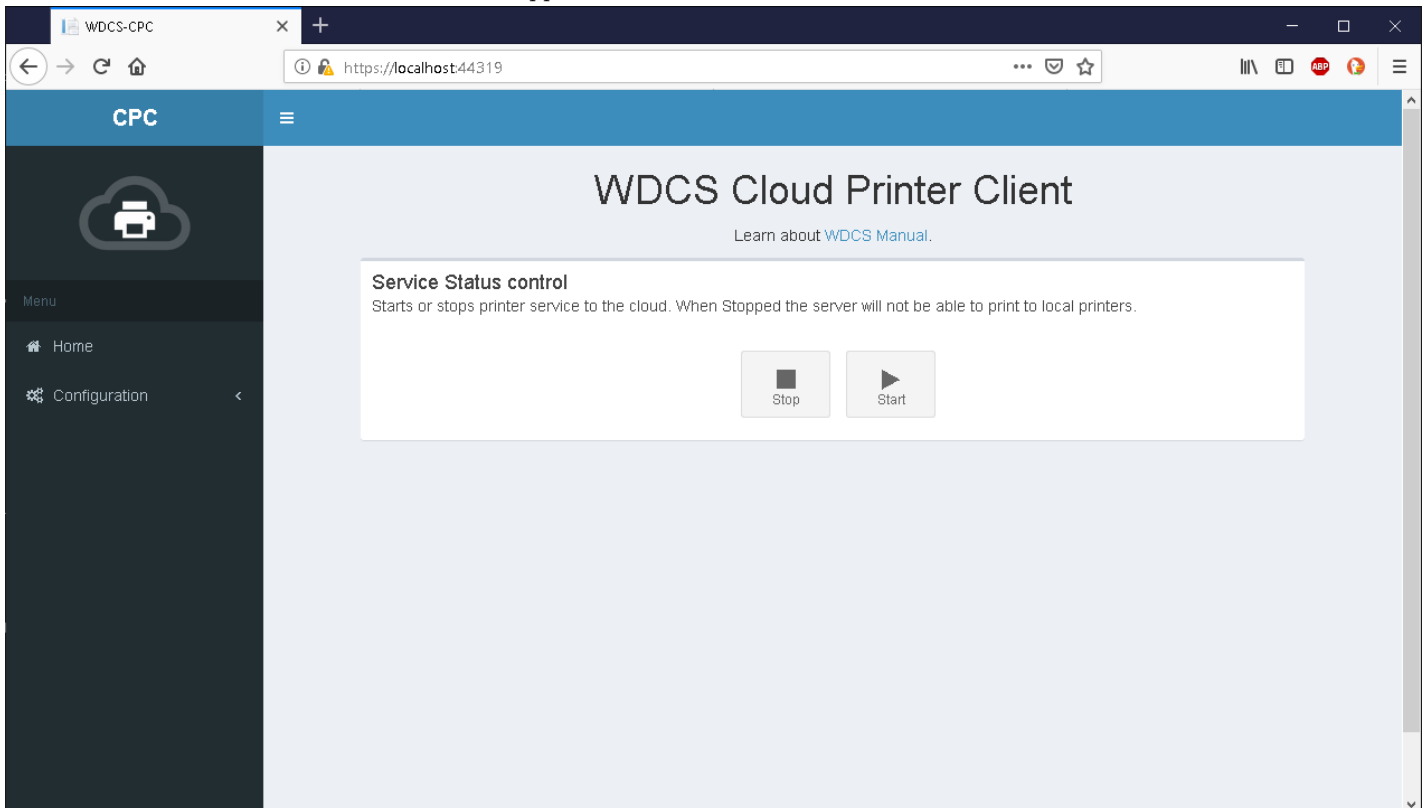
4.8 Swagger

5. Cloud Printer Provider

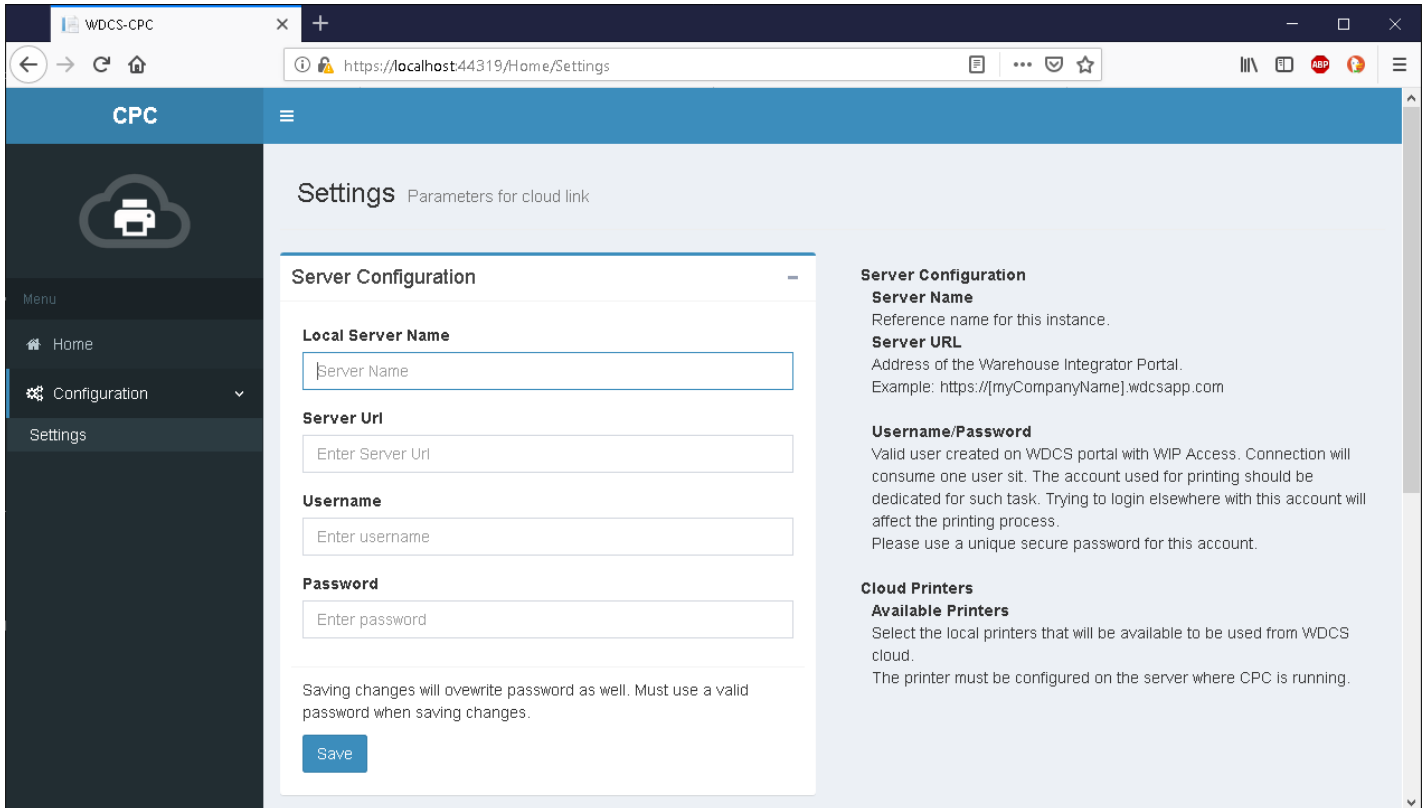
5.1 Cloud Printer Client

Cloud Printer Client is an application that links local printers with the WDCS cloud. CPC provides a strong secure connection between local facilities with the cloud. This allows printing directly from the WDCS web application to a local printer. Reports can be printed from anywhere in the world via a PC or mobile device to a local printer. There is no need to open any special port/rule in the local firewall. Enabling CPC is as simple as installing the CPC service in a local windows PC and configuring printers to that particular computer.

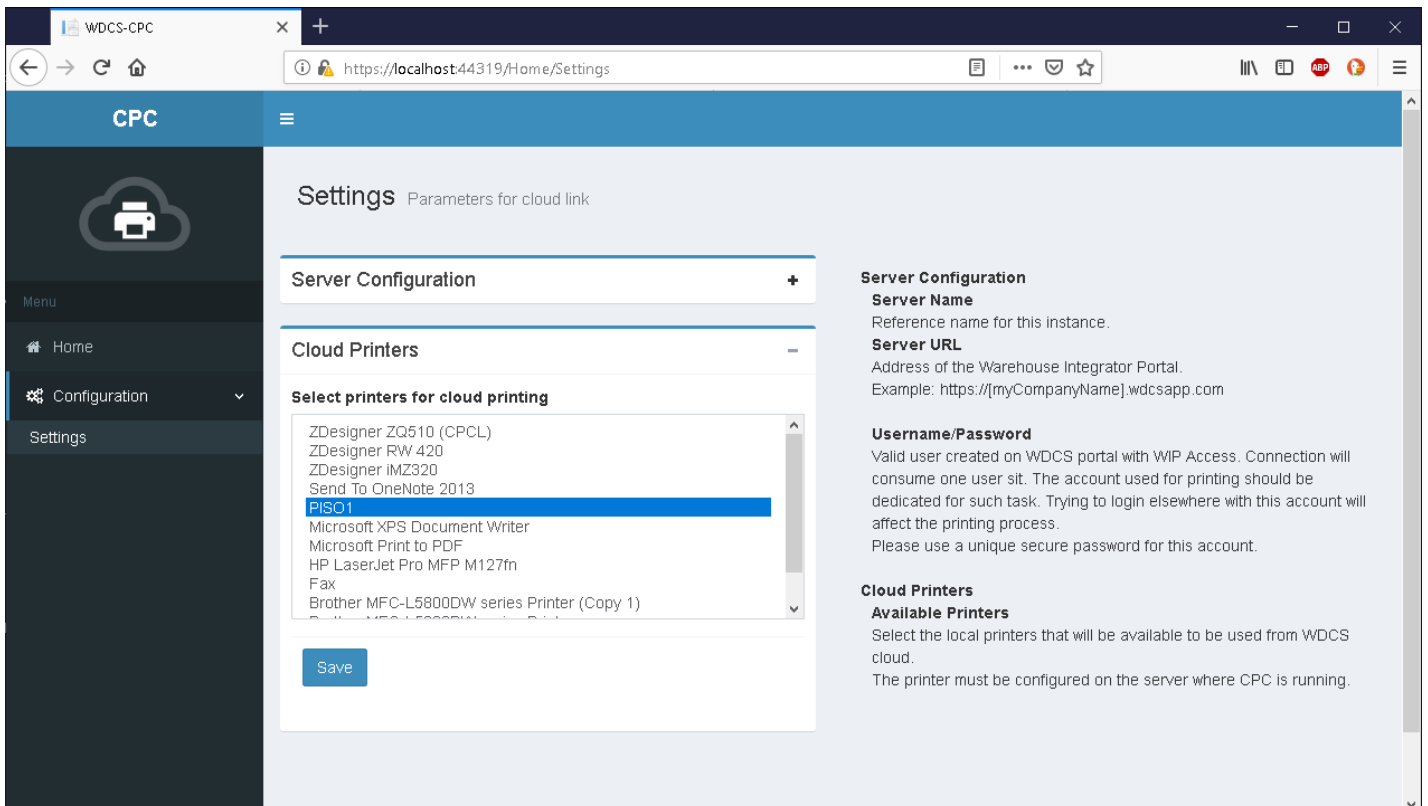
From the Home screen the CPC service can be stopped or started.



Server configuration holds the information for cloud connection. A valid username should be assigned for CPC usage. The User must not be shared with other system users or operations.



Cloud Printers lists all printers available on the local computer. Only printers selected in this list will be available from the cloud. User must select as many printers as needed from the list of printers available and click on Save. After making any changes it is recommended that the user restart the CPC service from the Home screen.



6. External Api

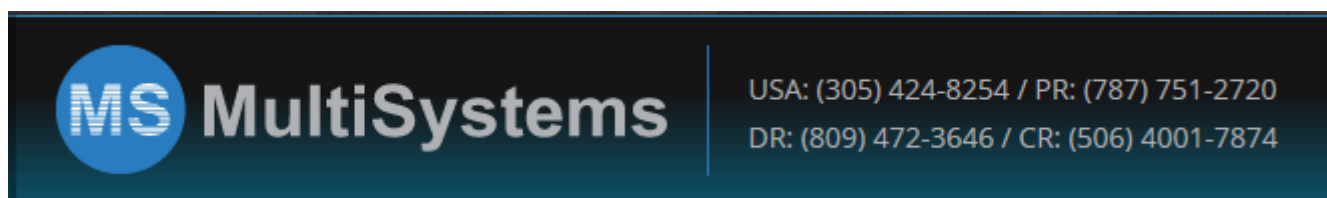
6.1 Overview

Wdcs has a rich external api that allow to be easily integrated with different systems. Allowing the flow in and out of data.

6.2 Enpoint definitions

7. About

7.1 MultiSystems



MultiSystems, Inc. is a systems integrator of supply chain automation, enterprise mobility and plant floor solutions, based on performance and productivity improvement and centered on actual and future needs.

MultiSystems integrates today's best automatic identification and data collection technology for process optimization - including thermal printing, mobile computers, advanced data capture, on-line inspection, packaging automation, wireless networks, RFID, access control, security and much more - backing them with the implementation and support services that are only available from an experienced industry leader.

We have regional offices in Puerto Rico, the Dominican Republic, and Costa Rica.

7.1.1 Highlights

- Over 30 years of experience on markets regulated and focused on quality of processes such as ISO, FDA, USDA, among others.
- Focused on providing a complete solution, based on the current and future needs of our customers in the field of automated data collection.
- Over 800 customers within the Manufacturing (Pharmaceuticals, Medical Devices, Bio-technology, Electrical, etc.) Retail, Distribution, Warehouse, Healthcare and local and federal Government segments.
- Multiple solutions installed within the same companies
- Strong service oriented organization with over 50 employees in the region

7.1.2 Our Value-Added Proposition

- Over 10,000 Printers, Data Terminals Units and Wireless Infrastructures Installed.
- Operations standardized and formalized through the development and implementation of Standard Operating Procedures (SOPs) based on IEEE Software Engineering Standards.
- Over 30 years of experience implementing Automated Solutions in regulated markets focused on quality of processes such as ISO, FDA, USDA, among others.
- Premium On-Site Service and Support by Manufacturers Certified Personnel
- Systems & Programming Development and Support
- Installation, Setup & Configuration
- Preventive Maintenance Contracts
- Local Availability of Spare Parts
- Labels, Ribbons and other consumables.

8. Glossary

Carrier: A carrier is the company that delivers goods to the warehouse.

ERP: Acronym for Enterprise Resource Planning.

Export: Process of copying data from the WDCS to outsources.

FIFO: First In First Out. Rule used for warehouse inventory movement. The "First In First Out" rule is based on the expiration date. Products having a later expiration date will have priority when dispatching.

Forward Picking Location: Warehouse Location with the highest picking priority (one).

GUI: Acronym for Graphical User Interface. Used when referring to the pictures, menus or buttons that are used for the user to interact with the application.

Import: The process of copying information from outsources to the WDCS database.

Items: Products are called Items throughout the system. Items are assigned to a specific warehouse and each item must be configured with a specific unit of measure for boxes and one unit of measure for weight as well as other specific settings.

LIFO: Last In First Out. Rule used for warehouse inventory movement. The "Last In First Out" rule is based on the expiration date. Products having an earlier expiration date will have priority when dispatching.

Location: A location is a place where products are stored, it can be from part of a rack or even an entire room.

Pallet: A pallet is a flat surface used to group a certain amount of goods in a stable way.

PO: Purchase Orders (PO) list what products will go into the inventory from outsources.

SKU: Acronym for Stock Keeping Unit

Staging Location: Preferred location for picking and shipping transactions. Also may be called Pick and Pack location.

Windows: Windows is a registered trademark of Microsoft Corporation in the United States and other countries.

WDCS: Acronym for Warehouse and Distribution Control System.