Warehouse Management System

Manual

Table of Contents

Introduction	3
Task Management	3
Incoming cargo	4
Outgoing cargo	6
Moving a trailer	6
Moving a cargo	7
Custom Task	8
Shipment Management	9
Work Queue	1 2
Action History	1 4
Warehouse Monitor	1 5
Trailer Search	17
Company Profile	19

Introduction

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

The functionality contains the following tabs:

- Task Management
- Shipment Management
- Work Queue
- Action History
- Warehouse Monitor
- Trailer Search
- Company Profile
- Shunter Board

Task Management

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

Task Mar	nagement				Add Incoming	Add Outgoing	Add Shunt	Add Swing Add Custom				
	Concord Warehouse Concord Warehouse Concord War											
Task Number	Start Date	Status	Shipper	Dispatcher	Trailer	Driver	Door	PB Number				

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

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

- Incoming / task for incoming cargo
- Outgoing / task for outgoing cargo
- Outgoing virtual / the task of creating cargo that is not yet in stock
- Shunt / the task of moving a trailer from one door to another
- Swing / the task of moving cargo from one trailer to another

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

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

#	Task #	Start Date J≟	ETA/Ship By	Task Type	Status	Created Date	Start Processing Date	Date Completed	Shipper	Dispatcher	Trailer #	Driver	Door #	Discrepancies	Actions
12		2021- 02-09	23:00	Incoming	expected	2021-02- 09 18:11									
															<u></u>
										oming Task #	() (expe	cted)		
	Priority * Start Date *								ETA *						
									18/			09-02-2021	i	23 : 00	
									Warehouse			Dispatcher			
												~			-
									Expected T	railer			Trailer Parking Space		
											×	+			
									Driver		× ·	F			
									РВ	+ Select V	/irtual Shipmer	nts		+ Add New Shipme	1
									PB # *			Shipment P	arking Sp	ace	
														*	
									Expected	(Stored 0)*		Units *			
												Full Truc	k Load	~	

Incoming cargo

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

Add Incoming Tas	sk ()	3
Warehouse *		Dispatcher *
Select warehouse	~	First select warehouse
Priority *	Start Date *	ETA *
Priority	dd-mm-yyyy	/ 🖬 HH MM
Trailer		Trailer Door
	+	
Driver		
	+	
Step 1: + Se	elect Virtual Shipments	Step 2: + Add New Shipment
		Save Cancel

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

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

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

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

Outgoing cargo

Add Outgoing...

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

Add Outgoing Task	0	×
Warehouse *	Auto c	create incoming task on another terminal 🗌 Dispatcher *
Select warehouse	~	First select warehouse
Priority *	Start Date *	Ship By *
Priority	dd-mm-yyyy	HH MM
Trailer ANY trailer		Trailer Door
	+	•
Driver	+	
Add PB on trailer St	ep 1: + Select Shipm	nent Step 2: + Add Virtual Shipment
		Save Cancel

Available buttons:

Add PB on trailer - allows you to add a probill number
+ Select Shipment - allows you to select a shipment
+ Add Virtual Shipment - add shipment from the list of previously created

Moving a trailer

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

Warehouse *		Dispatcher *		
Select warehouse	~	First select w	arehouse	~
Priority *	Start Date *		ETA *	
Priority	dd-mm-yyyy		HH MM	
Trailer ANY trailer	1	railer Door		
	+			~
Dispatcher Descriptions	(Instructions			

Moving a cargo

In order to create a task for moving a cargo from one trailer to another, please click on the button

Add Swing..., after that it will be possible to select a warehouse, dispatcher, task processing priority, start date, approximate end date and information about the driver. Also, there are fields for filling in information about the original trailer and the one to which the cargo was moved; information about the door number where the cargo is taken from and where to it should be moved. By clicking on the

button + Add New Shipment (inside the 'Add Swing' window) we can add information about the new cargo.

Add Swing Task ()		×						
Warehouse *		Dispatcher *						
Select warehouse	~	~						
Priority *	Start Date *	ETA *						
Priority	dd-mm-yyyy	r 🖬 HH MM						
Origin Trailer		Origin Trailer Door						
	+	~						
Destination Trailer		Destination Trailer Door						
	+	~						
Driver								
	+							
		+ Add New Shipment						
		Save Cancel						

Custom Task

Add Custom...

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

Priority dd-mm-yyyy iii HH MM ailer ANY trailer Trailer Door	Warehouse *		Dispatcher *						
ailer ANY trailer Trailer Door ter ter ter ter ter ter ter	Select warehouse	~	First select warehouse						
ailer ANY trailer Trailer Door	Priority *	Start Date *	ETA *						
tver +	Priority	dd-mm-yyyy	HH MM						
iver +	railer ANY trailer		Trailer Door						
+		+							
+	Driver								
anatabar Descriptions / Instructions)		+							
		Instructions*							
	patcher Descriptions /								
	ispatcher Descriptions /								
	ispatcher Descriptions /								
	Dispatcher Descriptions /								
	Dispatcher Descriptions /								

You can create a custom task by clicking on

Shipment Management

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

	Shipn	nent I	Mana	ageme	nt					Selecte shipme						Ship	out
					·			No shipr	ment sele	ected. Use check	oboxes and	Add to selecti	on' button be	elow.			
1														🖹 Gener	rate Report	1 Hide Filters	C
	PB Numbe	r	Cr	eated Date Fre	om (Created Date	То	Trailer		D	oor		Status		Tas	k	
				dd-mm-yyyy		dd-mm-yy	yy 🖬			_		•					
Та	блица	а дает	- BO3I	можно	сть ре,	дактиј	оовать	ь дан	ные	путем і	нажат	ия на	🖋 Edit	Shipm	er 🗕		
	PB	Created Date JF	Unit	Expected Amount	Processed Amount	Stored Amount	Expected Trailer	Actual Trailer	Door	Receiver Nam	e Destir	ation	Status	Task	Task Type	Actions	
C	1 2226-623	2021- 02-09 18:29	Skid	1	0								expected		receive	🖋 Edit Shipme	er 👻
																/	
										Edit Inco	oming Sh	ipment (Pr	obill #	Та	sk)	×
										PB # *			:	Shipment D	000r#		
														Select D	oor		~
										Expected *				Select Unit	s *		
										1				Skid			~
										Weight Weight		Select Units	~	Select Type	*		~
												di	•	Regular			•
										Receiver Na	ame						
										Destination							

In addition to editing the already created information on the cargo, you can also view the information

by clicking on the arrow in the 'Edit Shipment' button like the following (without the possibility of editing).

PB #		Door #	
		Select Door	
Expected Amount	Processed Amount	Select Units	
1	0	Skid	
Weight	Select Units	Select Type	
Weight	lb 🗸	Regular	
Receiver Name Destination			
	ons / Instructions		

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

Sł	Shipment Management									Selected shipmen					Ship out	
Co	Concord Warehouse								St	ored Amount: 0 🗙	PB:	Stored Amount:	0 🗙			
							_						Gene	erate Report		C
	РВ	Created Date ↓ ₹	Unit	Expected Amount	Processed Amount	Stored Amount	Expected Trailer	Actual Trailer	Door	Receiver Name	Destination	Status	Task	Task Type	Actions	
		2021- 02-09 18:29	Skid	1	0					Daptan	Therefore, CP4	expected	1000000	receive	🖋 Edit Shipmer 👻	

Add Outgoing Task (Wareh	ouse)			×
	Auto cr	eate incoming ta	ask on anoth	er terminal	
Warehouse *		Dispatcher *			
	~				~
Priority *	Start Date *		Ship By *		
last	dd-mm-yyyy		HH	MM	
Trailer ANY trailer		Trailer Door			
	+				~
Driver	+				
Add PB on trailer Step 1	+ Select Shipm	ent Step	• 2: + Add	Virtual Shipr	nent
1 8 Skid Skid					

side next to the filter button.

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

 PB
 Create Date
 Unit
 Expected/rocesser
 Stored
 Expected_Actual
 Door
 Receiver Name
 Destination
 Task
 Notes

Work Queue

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

WMS					Assig	n Shipp	er to Ta	ask #1482	239 ()		×			online
Wa	ork Q	ueue		~	Select Select	Shipper ct Shipper						~			
Inc	oming 🔳	Outgoing	Outgoing	Virtual 🔳						Assign	Shipper C	ancel			Show Filters
#	Start Date <u>J=</u>	ETA/Ship By	Task #	Туре	Status	Trailer	Door	Expected Amount	Processed Amount	Driver	Dispatcher	Shipper	Shipper As sig n Date	Start Processing Date	Actions
12	2021- 02-09	23:00	148239	receiving	NEW			PB							🛃 Assign Shipper 🗸

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

#	Start Date J≞	ETA/Ship By	Task #	Туре	Status	Trailer	Door	Expected Amount	Processed Amount	Driver	Dispatcher	Shipper	Shipper Assign Date	Start Processing Date	Actions
12	2021- 02-09	23:00		receiving	ASSIGNED			РВ				Artem 🚽	2021- 03-01 05:51		🖋 Start Processir 👻

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

Start Date	Task Number	Туре	Status	Trailer	Door	Dispatcher	Shipper	PB Number
dd-mm-y		~		~	~	~	~	

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

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

NJ Yard 🗸		Expecting Processing		Assigned		✓ In Process		Archive	
-----------	--	----------------------	--	----------	--	--------------	--	---------	--

The main information of the Work Queue tab is presented in a table with data for each of the tasks created earlier. Also, when you click on the task number, you can view all the detailed information (without the possibility of editing) on the task itself and on the probills associated with it.

		WMS			View I	ncoming Ta	ask # 1481	(Ware	nouse)	(expecte	d) ×			online	
W	ork C	Queue			Task	Attachments										
				~	Order #			Start [Date		Ship By					
					825/	803		10-0	02-2021		06	: 00				
i i	coming	Outgoing	Outgoi	ng Virtual 1	Dispatcl	ner										Show Filters
#	Start Date	ETA/Ship By	Task #	Туре		t Dispatcher						~	Shipper	Shipper Assign	Start Processing	Actions
	1F				Origin Ti	railer (Expecte	d: 55249)		Origin Traile					Date	Date	
80	03 2021-		1481	receiving				*	Select Do	or		~				🛃 Assign Shi
	02-10				Driver											
					0.00			•								
					РВ	РВ	PB									
8.	4 2021-			receiving	PB #			Shipm	nent Door #			ave on railer				🛃 Assign Shi
	02-10							Sel	lect Door		~					
					Exped	cted Amount	Processed Ar	nount	Selected Uni	ts						
8	8 2021-	06:00		receiving	6		0		Skid			~				🚑 Assign Shi

The 'View Incoming Task' window allows you to view the documents attached to this task.

TR	RACł					View Incoming Task # 1481	(Warehouse) (expecte	d) ×			Main Adminis online		Log
	Wo	ork C	Queue			Task Attachments								
		Wa	rehouse		~	File Name		Actions						
	Inco	oming	Outgoing	Outgoir	ng Virtual								Show Filt	ers
	#	Start Date ↓≟	ETA/Ship By	Task #	Туре				Close	Shipper	Shipper Assign Date	Start Processing Date	Actions	

Action History

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

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

Warehouse	~				Þ Hide Fi
Task	PB Number	Action Type	User Type	User Name	Date Range
			▶	~	▶

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

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

Warehouse Monitor

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

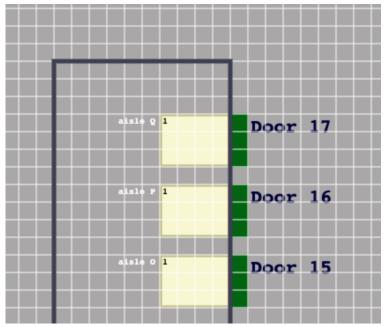
PB Number	Task ID	Trailer Door	Shipment Door	Location
		Door	Door	~
		- -	–	

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

🗞 Tasks 🛛 Shipment 🛛 😤 Work Queue

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

To the left of the tabs described above there is the layout of the warehouse and the doors in it.

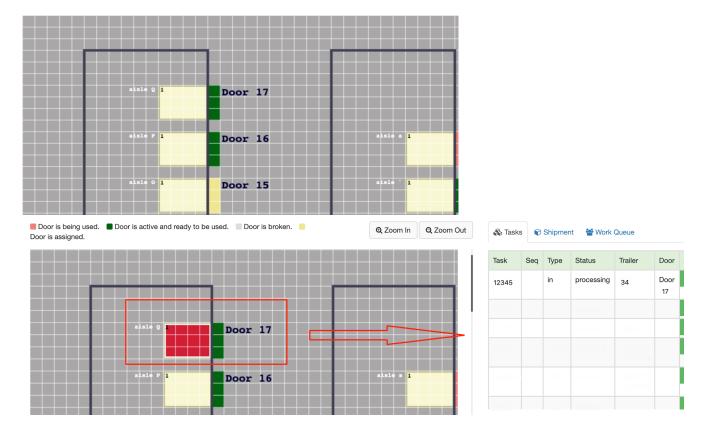


Above it there are current statuses of the doors:

the door is currently being used
the door is available and ready to be used
door is broken/out of order
door is assigned

You can enlarge or reduce the warehouse layout by pressing the Q Zoom In and Q Zoom Out buttons.

Also, the main window is a visual image of the selected warehouse. When you click on a warehouse or door, by filtering - the current status of the task on which the action is performed will be displayed in the table on the left.



Trailer Search

The Trailer Search tab is a series of trailer search options.

You can filter the search by the selected warehouse, that is located underneath the tab name:

Trailer Search

NJ Yord	•	~

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

1. Trailers.

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

Trailers
 Trailers at location without stored shipments All trailers at location Trailers elsewhere with stored shipments

By selecting one of the criterias, the list of trailers appears below.

🛲 Trailers
 Trailers at location without stored shipments
 All trailers at location
O Trailers elsewhere with stored shipments
Search Trailer Number
Trailer: # 123 , dry-van
Trailer: #1234 , dry-van

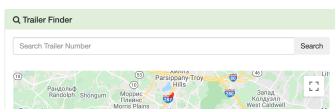
Also, in this block there is a field where you can search for a trailer by writing its number.

Search Trailer Number

2. Trailer Finder

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

can be entered in the Search field.



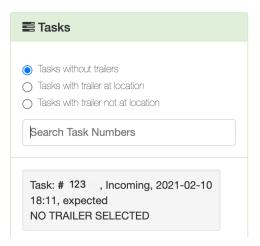
3. Tasks.

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

- List of criteria for searching tasks:
- tasks without trailers;
- tasks with trailers at location;
- tasks with trailers not at location.

Tasks	
 Tasks without trailers Tasks with trailer at location Tasks with trailer not at location 	

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



Company Profile

The Company Profile tab consists of several blocks such as:

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

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

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

Select Yard for this Warehouse Select yard		Карта Спутник 📪 🥂 🗸 🔽 🛄 🔀 []
rehouse Name * Address Information	Working Hours * 8-12	
* Re	jion *	и и соединенные са и от раз и соединенные са и от раз и соединенные са и от соединенные глу и от соединенные глу и соед
ostal Code * Country *		Google Картографические данные © 2021 Google, INEGI Условия использовани
Contact Information st Name * Las	t Name *	
nail * Business Phone *	Personal Phone *	
		Edit 🗸

	Layout	•				
	View					
on	🖋 Edi	t				

You can view or edit the layout of each of the warehouses by clicking o

ſ		F		1	Warehouse 1 Q Zoom In Q Zoom Out Aisle: a Section Available: 1	
ده	sle Q 1	Door 17			Locate	
	sle P 1	Door 16	aisle a 1	Door 33	Shelf Barcode	Sear
	sle 0 1	Door 15	aisle ` 1	Door 32	Aisle Section	Sean
ده	S10 N 1	Door 14	alsie _ 1	Door 31	Port	Sear

3. The sub-tab ^{• User Management} contains information about each user and the level of access they have to the WMS module.

By clicking on the 'Show Filters' button we can filter users by their type.

Concord Warehouse	𝔣 Hide Filters	Add User		
Login			User Type	
				•
			Warehouse shipper	
			CSR	1
			Dispatcher	
Login	First Name	Last Name	Warehouse administrator	

Also, user affiliation can be filtered by the name of the warehouse, and by clicking on

 $\hfill\square$ ${}^{\rm Show\,inactive\,users.}$ button, you can limit the list to inactive users.

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

Warehouse		Warehouse Worker Type			
Concord Warehouse	~	Warehouse shipper	~		
Contact Informa	ation				
First Name *		Last Name *			
First Name		Last Name			
Email *		Notification Email			
Email		Notification Email			
Password *		Confirm Password *			
Password		Confirm Password			
Phone *					
Phone					
Address Informa Address Line Address	ation				
City		Region			
City		Region			
Postal Code	Country				
Postal Code	Country				

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

Login	First Name	Last Name	Type J <u>i</u>	Address	Actions
					🖋 Edit 🛛 👻

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

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

Add Trailer	
Trailer Owner	Trailer Number *
Trailer Owner	Trailer Number
Select Trailer Type *	
	~
	Save Cancel

5. If you select the tab ^{Privers}, you can see a table with information about the driver and the option to edit or delete this information.

Driver Name	Actions
1000	🖋 Edit 🗸 🗸
1012	🖋 Edit 🗸 🗸

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

Add Driver			
Driver Name *			
Driver Name			
		Save	Cancel