# EBS Mobile Warehouse Operations

**Entersoft Business Suite® 4.0 | Entersoft Expert® 4.0 | Entersoft Retail®**

Daily processes and use cases

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# Overview

The purpose of this manual is to showcase the process workflows included in the **Mobile Warehouse Operations** subsystem.

These are **management tasks,** that take place within the company and aim to promptly meet the company needs in terms of **stock** and **enforce data accuracy.** In order to carry out these tasks with speed and accuracy, it is necessary that they can be performed using wireless terminals. For this purpose, the new Entersoft Mobile Warehouse Operations subsystem was developed.

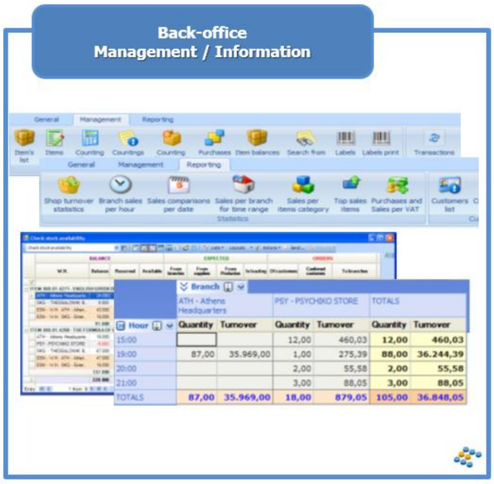
These tasks are:

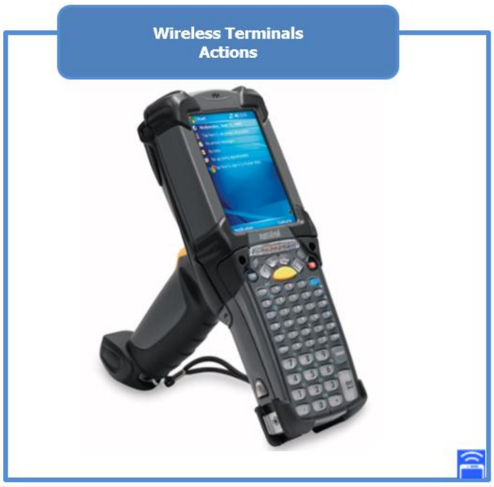
- Receipt from supplier
- Return to supplier
- Receipt from Head Office or Branch
- Ship to Head Office or Branch
- Receipt from 3rd party Warehouse
- Ship to 3rd party Warehouse
- Stock tacking
- Check prices
- Check stock availability
- My tasks
- Branch tasks

Through this subsystem, the actions performed by a wireless terminal user are **recorded in detail as primary data** and then **generated into documents.**

# Work environment

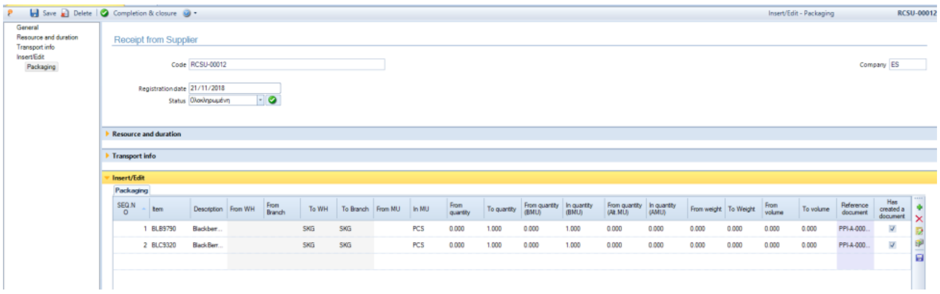
There are two distinct forms to the work environment. More specifically, back-office management carried out by users both from the Entersoft Business Suite® application, as well as from the Entersoft Retail® application and Wireless terminals recording actions.



# Concepts & Initialization

- **Transport action**. New entity **Transport action** is used to record the actions. Following the document "logic", each transport action is associated with an **Action type** which Specifys the behavior and update method. The transport action contains lines, **Item transport action**, which essentially refers to the recording entries of wireless terminals.



- **Order.** Usually, each action takes place against a previous event. For example, receipt from supplier takes place against an order or a Proforma invoice, while receipt from head office or another branch is takes place against the Delivery Note issued by the branch that's carrying out the delivery. These documents, which state the original "cause" of the recording action (order, delivery note, etc.), therefore have the role of order. This order is associated with recording actions and is called «Source document».
- **Ad-hoc actions.** Recording actions that are carried out WITHOUT an order are called Ad-hoc actions. In these cases, and depending on the process flow, an ad-hoc order is created automatically, that is, an order without item lines, apart from header information.
- **Target document.** The recording actions are generated into documents, which are called Target Documents.

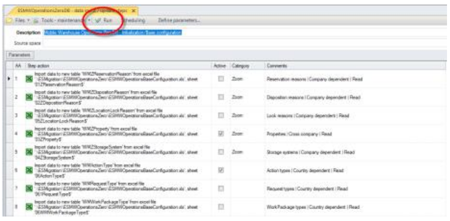
## Import configuration

Configuration is imported from the menu option: *Configuration and Tools | Data Import-Export | Import data (advanced mode) …*

- Import CRM_ZeroMigration_V4.emi

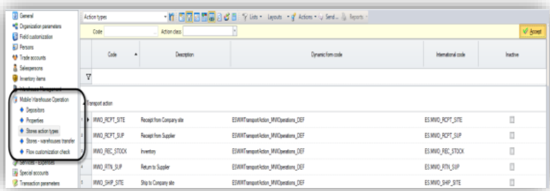
  from \ ESMigration \ **ESCRMZero.**
- Import ESMWOperationsZeroDB.emi from

  \ ESMigration \ **ESMWOperationsZero**

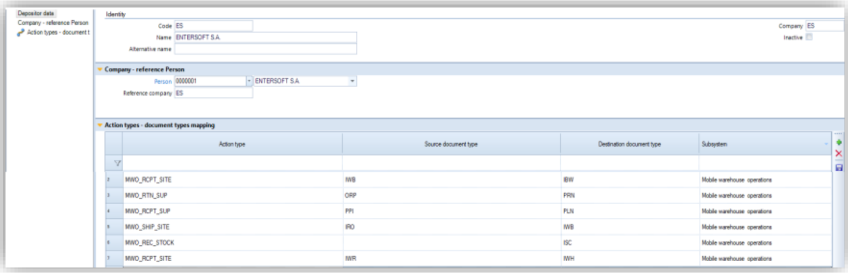


## Configuration

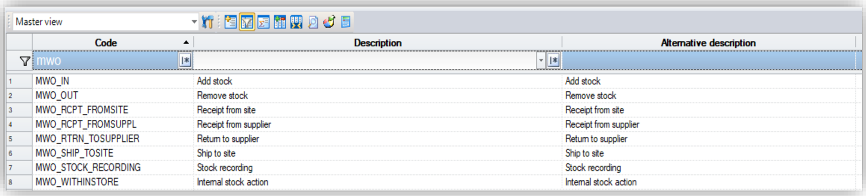
At the **Mobile Warehouse Operations** configuration node, the following options are  available:



- **Depositors**. The depositor is the company itself. At this point, important configuration elements are designated, regarding the way that final documents are updated, which will be discussed in detail in the following sections.




- **Properties.** This is a way of grouping multiple Action types that are used to control or activate a functionality. An action type can be linked to multiple attributes.




- **Action types.** The action types contain elements, necessary to identify actions, Specify their behavior as well as their display form. The action types suggested are pre-made, based on the initial customization and support the suggested procedures.

| Code | Description | Dynamic form code | International code |
|---|---|---|---|
| Transport action | | | |
| MWO_RCPT_SITE | Receipt from Company site | ESWMTransportAction_MWOperations_DEF | ES.MWO_RCPT_SITE |
| MWO_RCPT_SUP | Receipt from Supplier | ESWMTransportAction_MWOperations_DEF | ES.MWO_RCPT_SUP |
| MWO_REC_STOCK | Inventory | ESWMTransportAction_MWOperations_DEF | ES.MWO_REC_STOCK |
| MWO_RTN_SUP | Return to Supplier | ESWMTransportAction_MWOperations_DEF | ES.MWO_RTN_SUP |
| MWO_SHIP_SITE | Ship to Company site | ESWMTransportAction_MWOperations_DEF | ES.MWO_SHIP_SITE |

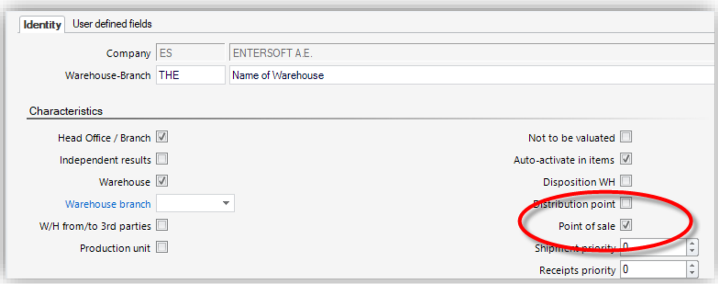
- **Stores-inventory control policy**. The stores-inventory transport control policy determines, whether or not inventory items can be part of wireless terminal procedures. Upon importing the configuration, the draft **MWO_Standard** - Standard Item Control Policy (MWO ICP) is imported.
- **Task type**. Upon import the configuration, task type **MWO** - MWO action is imported. This type is automatically linked to the Action types.

## Activation

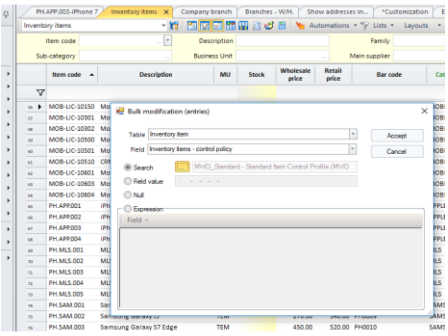
- In order to activate the various procedures and checks regarding the Store Processes Management subsystem, that must be designated in the relevant general parameter, in category **Mobile Warehouse Operations - Customization**:

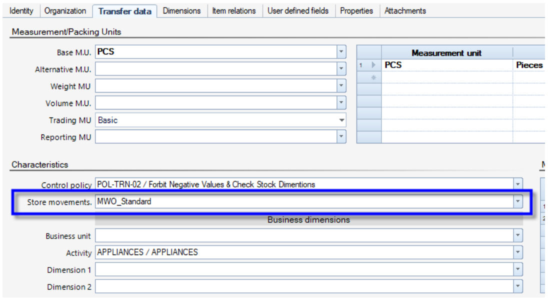
| CATEGORY: Mobile Warehouse Operations - Customization | | |
|---|---|---|
| Activate Mobile Warehouse Operations system | Completion | True |

- The branch in question should be designated as a **Point of Sale**. This is done in the company's address form, available in menu: *Inventory | Sites & Warehouses*.




- Inventory items, in order to be part of the warehouse operations, should be linked to the control policy. On the item screen, on the Transfer data page, the Store movements field has been added. Select: **MWO_Standard** - Standard Item Control Policy (MWO ICP). Furthermore, it is possible to run a batch update of the items from the item list.






In installations with *Entersoft WMS®* enabled, this field is already filled in with another policy. *In these installations, the WMS control policy must prevail*. However, this does not affect the functionality of the *Mobile Warehouse Operations* subsystem.

- User groups. Upon importing the configuration, the following user groups are added.

| Code | Description | AlternativeDescription |
|---|---|---|
| MWOBOAdmin | MWO Back Office Administrator | Administrator group for MW Operations Back Office |
| MWOBOUser | MWO Back Office User | User group for MW Operations Back Office |
| MWORFUser | MWO Mobile (RF) User | User group for MW Operations Mobile (RF) |

*These Groups have been introduced to the MWO-MWO Action task type through configuration.*
*In each installation, either users of Wireless Terminals and Back-office users should be assigned to these groups OR the existing groups should be integrated into the task type.*

# Procedures

In this chapter, use cases will be described in detail.

The guidelines and examples are mainly based on the recommended product configuration when it comes to documents, transitions, screen display formats and reporting tools.

In each process that will be presented in detail, procedures of wireless terminals are indicated by use of the icon . Back office procedures are marked using the  icon.

# Receipt from Supplier

This is added upon merchandise reception from the supplier, in order to update the Warehouse quantities.

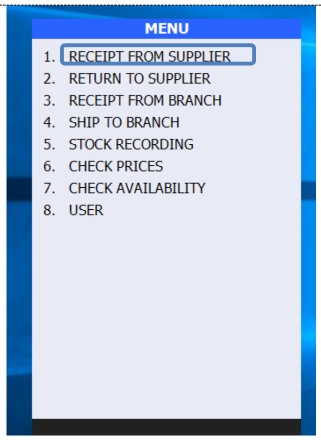
## By Receiving order

Procedure from the wireless terminal is as follows:

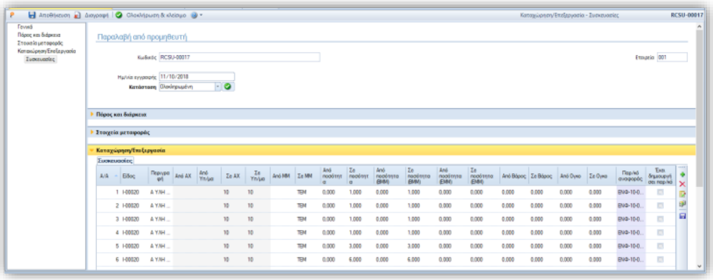
Specify task

### 1. Receipt from supplier

By selecting a task, the login branch and warehouse is automatically selected. Even if there's more than one warehouse, the one that is also designated as a branch is selected.

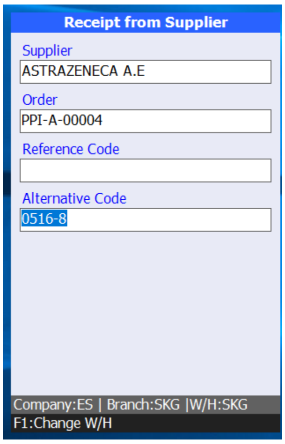



| | |
|---|---|
| Valid Action type: | **MWO_RCPT_SUP** (Receipt from Supplier) |
| Valid Order type: | **PPI** (Proforma) |



**General information**

At the bottom of the screen, one can view the company, branch, and warehouse where the data entry is made.




Using the **F1** key, one can select a different warehouse than the one suggested.


**Specify supplier**

The supplier is detected. The search for the supplier is carried out through one of the following ways:

a. Search from the suppliers' list using the button **F3**.

b. By typing part or all of the vendor's code, name or VAT number.

**Specify order**

The order is detected. The search for the order is carried out through one of the following ways:

a. With the use of a Barcode document.

b. Search from the documents list using the button **F3**.

c. By typing in the code

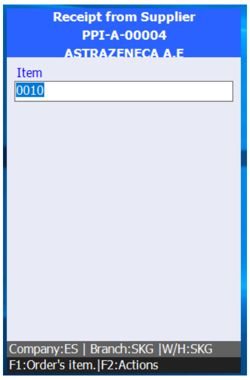
- ✓ Note that, in case the order information is known to the user, **it is not necessary to Specify a supplier**. The user can proceed to defining the order right away and upon completion, the supplier. However, if the order details are not known, it is recommended that the supplier is entered, in order to only search for the orders of that specific trade account.
- ✓ **It is recommended to use a unique barcode** identifier to speed up search time - identification of orders

The orders available for search are the ones not yet fully transitioned. The search time span is 30 days.

Note that the calendar range of the search can be configured using various parameters. See more in section: **Wireless terminal configuration**.

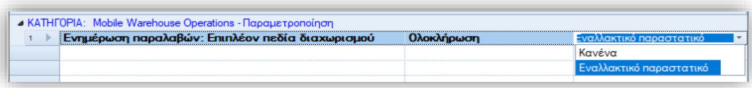
**Reference code** In this field the user enters the primary document, i.e. the original supplier order.

**Alternative code** This is used in case where an Order is **received in parts** at different times and **multiple Receipt notes** are issued for it. In this case, it's necessary to designate the <u>delivery note when executing any actions of receipt.</u>




The document updating process will respect this action and will create multiple Receipt notes.

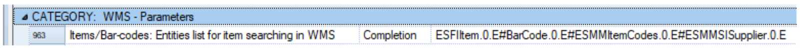
This functionality can be activated using general parameter:




**Items of receipt** In this screen added the **items** who received.

Finding items can be accomplished by one of the well-known search methods (*besides the code and the barcode may be the multiple product codes, coding of the alternative coding of the suppliers, etc.).* A bar-code reader can also be used.

The search for items is Specifyd in the general parameter.




**It is recommended to use a unique barcode** identifier to speed up the search time - identification of orders

In addition, search is supported in the following areas:

LOTBarcode.0.E#LotCode.0.E#SNCode.0.E#SNBarCode.0.E

Where

LotCode : Code lot

LOTBarcode : Barcode lot

SNCode : Code serial number

SNBarCode : Barcode serial number

A general parameter is the same as parameter: ***Items/Bar-codes: Entities list to search item in retail mode***

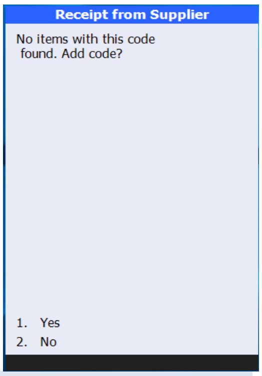
See corresponding articles in the Knowledge Base:

*KB-00130 - Search for items in Retail Mode*

*KB-00772 - Search for items in BarCode lot*

Check item compatibility

When selecting an item, there is a combability check for the product with the order. If a non-order item is selected, then confirm acceptance of the item.

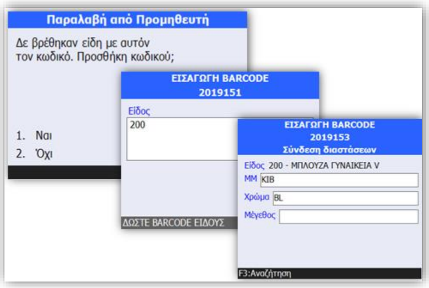



Note that this feature can be configured. See more in section: **Wireless terminals configuration**.

Add barcode item

In case it's not possible to find an item due to lack of barcode, there's the possibility of instantly adding a new barcode in the multiple item codes.

If add barcode is selected, a 2nd screen appears where the item needs to be designated, either using its code or one of the other inventory match-up data. On the next screen, the measurement unit and dimensions are linked, if these do exist.




Note that this feature can be configured. See more in section: **Wireless terminals configuration**.

Select warehouse dimensions

If the item monitors some of the warehouse dimensions, a screen to set dimensions follows.

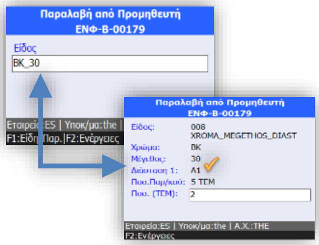
Choice of items of an order

Using the **F1** key you can see and select from the items of the order. With the option, more information as a unit of measurement and warehouse dimensions are also given.

For the two non-named warehouse dimensions in particular (Warehouse dimension 1 & Warehouse dimensions 2), there's the possibility of filling them in automatically.

**Automatically fill in dimensions based on order**

After the item, color and size have been specified, probably using barcode, the order lines are reviewed, and if a <u>unique</u> value is found in warehouse dimension 1 or 2 for the relevant combination (item-color-size), it is filled in automatically. If the combination provided is not found at all (ad-hoc item delivery), or if more dimension values are found for the same combination, then the option stays blank and filling it manually is required.




Note that this feature can be configured. See more in section: **Wireless terminals configuration**.

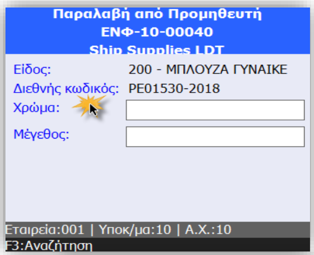
**Item information**

For the information needs during task execution to be met, there's the possibility of viewing two more fields from the item.

Activating this functionality is possible through general parameter:

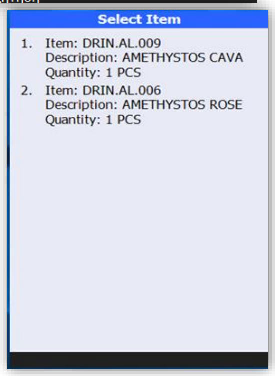
| ΚΑΤΗΓΟΡΙΑ: Mobile Warehouse Operations - Παραμετροποίηση | | | |
|---|---|---|---|
| 6 | **Πεδίο του πίνακα είδους προς απεικόνιση σε client εφαρμογές (Entersoft RF)** | **Ολοκλήρωση** | **InternationalCode** |
| 7 | Πεδίο του πίνακα είδους προς απεικόνιση σε client εφαρμογές (Entersoft RF) | Ολοκλήρωση | |

If the above are filled it, then this information appears in all wireless terminals' procedures after the item information. Keep in mind that, the selected field appears only when the item's value is filled in, otherwise it is exempted.



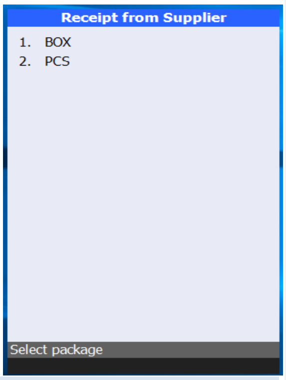

**Select from order items**

By using the **F1** key, one can view and select out of the order items. Upon selection, the rest of the line information is also recommended, such as measurement unit and warehouse dimensions.



Measurement unit

It is essential that the unit of **measurement** (or **packaging**) is correctly filled in. If only one unit of measurement has been Specifyd in the item, then this screen is omitted.




The measurement units available for selection are all units of measurement of the items, apart from the physical units of measurement (weight, volume, surface area, etc.). Physical units of measurement are only available if set as a basic or alternative item unit.

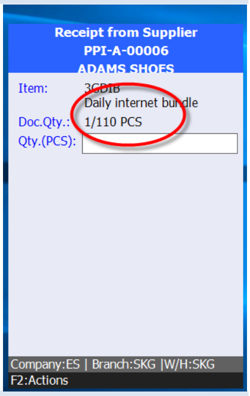
It is possible to automatically select the item's basic measurement unit. This feature is configurable.

See more in section: **Wireless terminals configuration.**

Set quantity

On this screen, the user can set the quantity to be received..

In addition, there's information on the progressive receipt of item in relation to the quantity and measurement unit of the order in field «**Doc.Qty**». If the receipt takes place in a different measurement unit than that of the order, the measurement unit is changed to the one considered as **reference** measurement unit in this field.




There is a possibility of automatic suggestion of quantity 1 as well as automatic confirmation of the suggested quantity. If enabled, then, once the item is designated, a quantity of 1 is automatically filled in the quantity field. If the second setting is activated too, then the process continues without requiring user confirmation.

See more in section: **Wireless terminals configuration**.

**Related Actions**

During the process, it is possible to check the task progress.

Without an designating an item, by using the **F2** key, one can see ALL actions related to an order for ALL items.

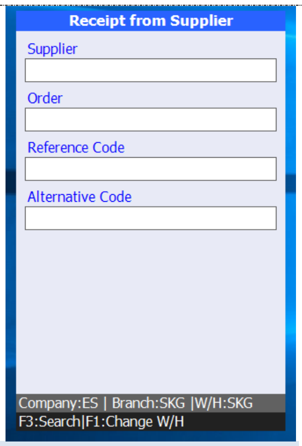
Whereas, if an item has been designated, then one can see the actions taken for the certain item up until now.


**Repeat step**

After confirming the quantity, the set item screen returns, in order for the user to proceed with a new item delivery.

**Completion**

By exiting back to home screen, the entry registration is **Complete** and a new process can start anew. Even if the same order is selected, a NEW action will be created.




An action being completed, carried out by the above functionality, is an important action element, as **ONLY actions in the Completed state** are available to update and create the final document.

## Ad-hoc receipt

When there is no order or proforma, the process is the same remains as shown in the previous section. HOWEVER, in this case an **ad-hoc order is created**, meaning an order without item lines, just header information.

**Designate task**

**1. Receipt from supplier**

| | |
|---|---|
| Valid Action type: | **MWO_RCPT_SUP** (Receipt from Supplier) |
| Valid Order type: | **PPI** (Proforma) |

**Designate supplier**

Entering the supplier is, in this case, **obligatory**.

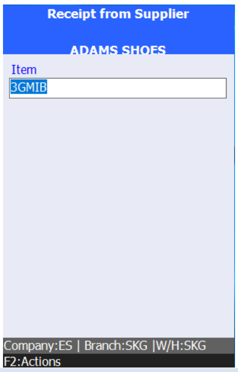
Searching for the supplier is possible in the following ways:

a. Search from the suppliers list, using the **F3** button.

b. By typing part or the whole of the code, brand name or the VAT number of the supplier.

Items of receipt

In this scree, one can enter the **items** with the **quantities** who received.



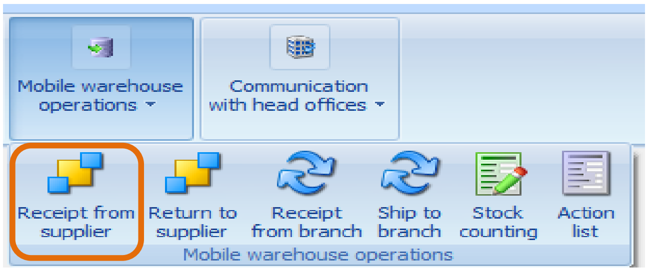

If the item monitors one of the warehouse dimensions, a screen to enter the dimensions follows.

## Back-office operations

After the receipt action is Completed by the wireless terminal user, it's time for the receipt document creation process to continue. The logging actions are available in the **Receipt from supplier** option, on the menu node:

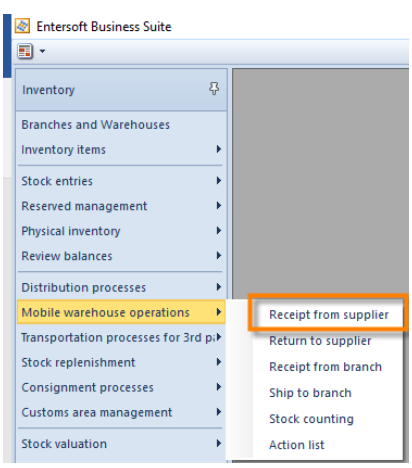
Entersoft Retail®

*Administration|**Mobile Warehouse operations***



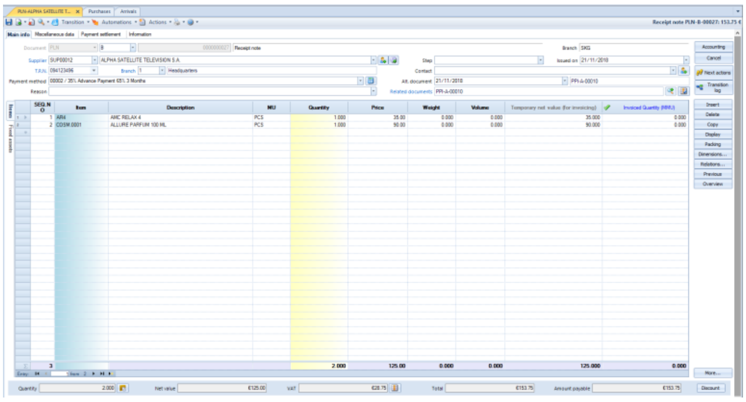

Entersoft Business Suite®

***Inventory***




General Data **Receipt from supplier.**

| | |
|---|---|
| Valid Order type: | **PPI** (Proforma) |
| Valid Document type: | **PLN** (Receipt note) |
| Valid Transition: | **119**. PPI=>PLN (Receipt Note from Proforma) |



Type and Series of document: The type of destination document is selected based on the table settings.
Match action types – document types in the Depositor form.

In order to select the series, the "Same series" setting overrides the rest, along with the transition type of document. In case this setting is not enabled, then one of the login branch series is selected.

Date: The document issue date is selected as the date of action execution.

Other header items: The header information of the source document is copied to the destination document, based on the transition rule specified in the destination document type.

Source: The source of these documents receives the attribute "Procedure".

**Marking documents** In order to find them easily, it is possible to mark these documents in one of their header fields.

**Receipt items** In the item section, the items are inserted along with the measurement unit, warehouse dimensions and quantities as recorded by the wireless terminal user.

> ⚠ Note that line information is NOT transported from the order to the generated document.

**Close pending quantities** *Automatic quantity matching* (backorder) is carried out, based on the transition rule specified in the target document type, in order for the Receipt Note to connect to the Order and to eliminate any "pending quantities".

> ⚠ Any new recordings actions connected to the SAME order, are incorporated into the SAME receipt note.

## Update methods

There are three methods of updating \ creating a document. Each installation facility should choose the preferred method, based on the business organization model.

- Direct update

  Updating the logging actions immediately upon their completion can be done by activating rule: *Mobile warehouse operations: Online update*, which is available in the Transport Action entity (*menu: Tools and configuration / Development & customization tools)*.

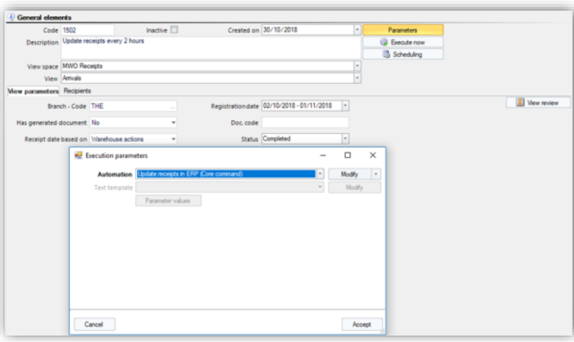

- Scheduled Update

  It is possible to create a new scheduled task (menu: *Tools and configuration\Schedule\Scheduled tasks*):

  Scroller area: MWO Receipts

  Scroller: Arrivals

  Automation: Update receipt in ERP (Core Command)

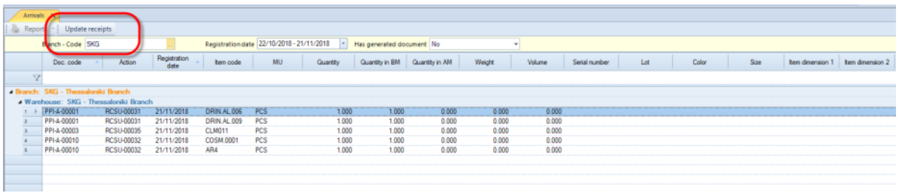


- On-demand update

Using the **Update receipts** option, which is available in the Receipt administration list from supplier (*menu: Inventory|Mobile warehouse operations|**Receipt from supplier***).

The scroller displays the actions that are not yet part of a document, as actions to be updated. Filtered are:

- ✓ the login branch actions
- ✓ actions in the "Completed" state




## Configuration

In this section, one can view all of the configuration parts of the process.

**Depositor**

Valid Action type: **MWO_RCPT_SUP** (Receipt from Supplier)

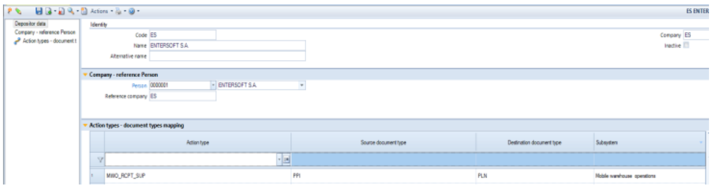
Valid Order type: **PPI** (Proforma)

Valid Document type: **PLN** (Receipt note)

On the Action types – document types mapping table, on the depositors' screen (*menu: Customization|Mobile Warehouse Operation|Depositors*) the triad of configuration elements listed above needs to be specified.

The combination of these three elements, **action type – source document type – destination document type** in this table specifies:

- Which type of **destination** document will be selected for the document creation process, when receipt actions are found with this specific action type and source document type.
- Which type of **source** document will be used in the case of ad-hoc receipts.



**Transition Rule**

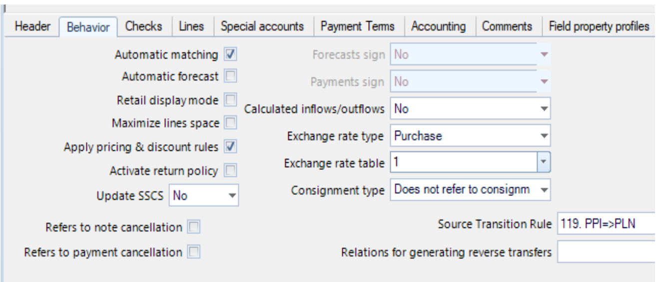
Valid Transition: **119**. PPI=>PLN (Receipt Note from Proforma)

In the destination document type (Receipt note), the transition rule should be designated (for example 119.PPI=>PLN).

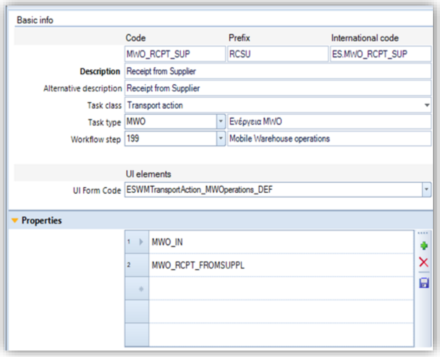
The transition rule ensures:

- Replication of the header information of the Order, onto the generated document.

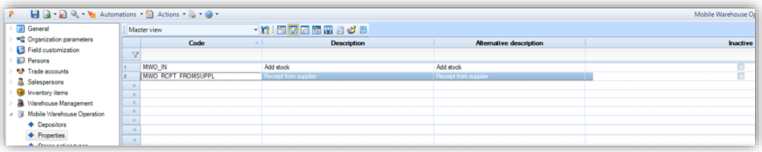
- Execution of the “Automatic quantity matching” procedure




Action Type The action type used is **MWO_RCPT_SUP** Receipt from Supplier, specified through the configuration settings (*see section:* ***Import configuration***).




Action type properties The following action type properties imported through configuration are used. (*see section:* ***Import configuration***).




General Parameters The following general parameters must be filled-in.

- **Property corresponding to Receipt from supplier**. The property entered here corresponds to the receipt action type(s) from a supplier. It is used in printing machines and processes to mark and group these action types.

- **Number of lines per doc.** Determines the number of lines a document can have. If the recording actions exceed this number, then multiple receipt documents are generated for the same order.

The parameter is shared for ALL process flows.

| CATEGORY: Mobile Warehouse Operations - Customization | | | |
|---|---|---|---|
| [illegible] | Property corresponding to receipt from supplier | Completion | MWO_RCPT_FROMSUPPL |
| [illegible] | Number of lines by doc. | Completion | 500 |

In addition, in the same category, there are parameters for marking the documents. In installation facilities where this functionality is sought for, it should be decided in which field of the document header the user wishes to store this information and what the reserved value will be.

- **Document table field in which source channel is saved**. Here, the field of the document header is designated, which will be reserved for marking documents.

- **Value saved in a document table field, in the ones that derive from Mobile Warehouse Operation subsystem procedures.** In order to specify the value that is filled in by the procedure.

| CATEGORY: Mobile Warehouse Operations - Customization | | | |
|---|---|---|---|
| [illegible] | Document table field in which source channel is saved | Completion | fADDimension1Code |
| [illegible] | Value which is saved in document table field in these derived from Mobile warehouse operation subsystem procedures | Completion | MWO |

Rules In order to activate the online update and online document creation. This rule is SHARED for all procedures except for Stock Taking.

| Entity | Transport action | | | |
|---|---|---|---|---|
| 182 | ☑ | ☐ | Rule | Mobile warehouse operations: Stock recording Online Update |

# Return to Supplier

## Via Return order

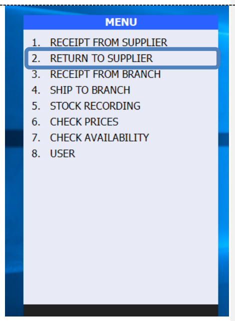
This is logged to Ship merchandise to the supplier (Return). This action updates the item count of the Warehouse and issues the Return Note to the supplier.

The process is similar to the Receipt from supplier procedure. As a result, the wireless terminal process will not be presented in detail, except for any new points, as well as the configuration information.

Specify task

**2. Return to supplier**

This is handled the same way as in the case of "Receipt from a supplier", that was presented in detail in the previous section. Thus, the steps of the process will not be presented in detail hereby, just the differences.




| | |
|---|---|
| Valid Action type: | **MWO_RTN_SUP** (Return to Supplier) |
| Valid Order type: | **ORP** (Purchase return order) |

## Ad-hoc shipping

When there is no return order, the process remains as shown in the previous section. HOWEVER, in this case, **an ad-hoc order is created**, that is, an order without item lines, just header information.

Specify task

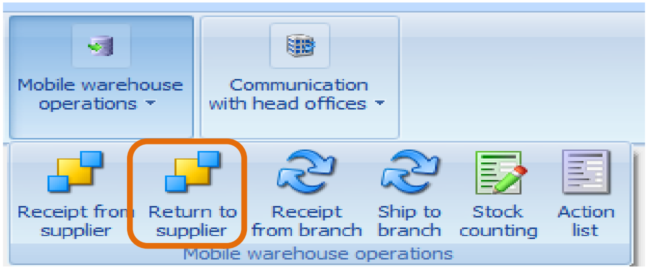
| | |
|---|---|
| Valid Action type: | **MWO_RTN_SUP** (Return to Supplier) |
| Valid Order type: | **ORP** (Purchase return order) |

## Back-office operations

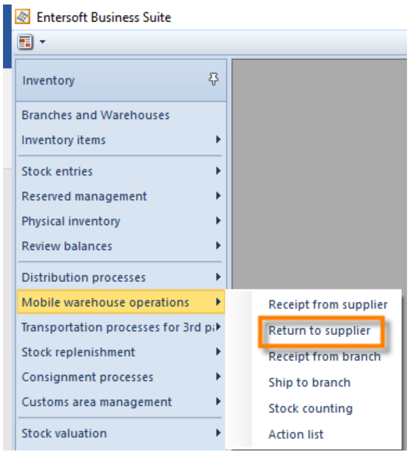
After the action has been Completed by the wireless terminal user, the process of creating the return document continues.

The logging actions are available in the **Return to supplier** option on the menu node:

Entersoft Retail® | *Administration|**Mobile Warehouse Operations***




Entersoft Business Suite® | ***Inventory***



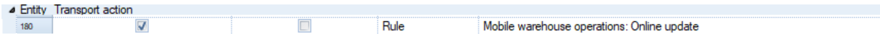

| | | |
|---|---|---|
| General Data | Valid Order type: | **ORP** (Purchase return order) |
| | Valid Doc type: | **PRN** (Goods return note) |
| | Valid Transition: | **101. ORP=>PRN** (Return prediction to Return note) |

### Update methods

There are three methods of updating/creating a document. Each installation facility should choose the preferred method, based on the business organizational model.

- Direct update

Updating the logging actions immediately upon completion can be done by enabling rule: *Mobile warehouse operations: Online update*, which is available in the Transport action entity (*menu: Tools and configuration/ Development & customization tools)*.



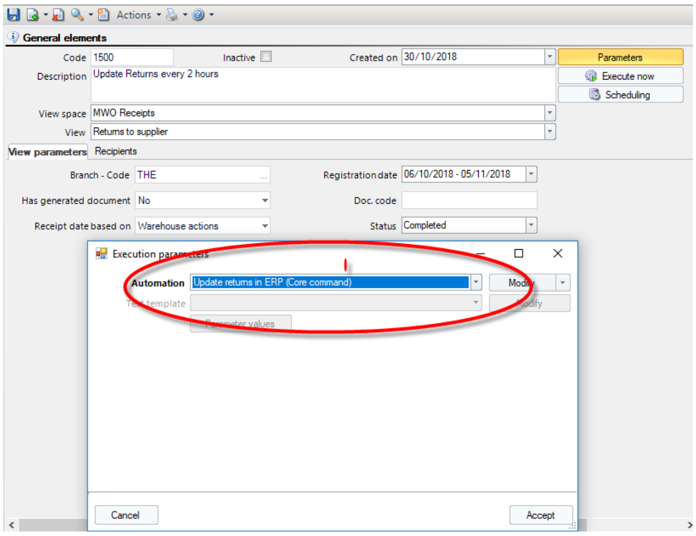

- Scheduled update

It is possible to create a new scheduled task (menu: *Tools and configuration|Schedule|Scheduled tasks*):

Scroller area: MWO Receipts

Scroller: Return to supplier

Automation: Update return in ERP (Core Command)




- On-demand update

Using the **Update Returns** option, which is available in the Receipt from supplier administration list (*menu: Inventory|Mobile warehouse operations|**Return to supplier***).

The scroller displays the actions that are not part of a document to be updated. Filtered are:

- ✓ the login branch actions
- ✓ actions in the "Completed" state

## Configuration

In this section, one can view all of the configuration parts of the process.

Depositor | Valid Action type: **MWO_RTN_SUP** (Receipt from Supplier)

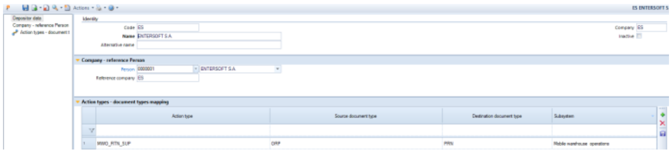
Valid Order type: **ORP** (Purchase return order)

Valid Doc type: **PRN** (Return of Receipt)

On the Action types – document types mapping table, on the depositor's screen (*menu: Customization|Mobile Warehouse Operation|Depositors*), the three configuration parameters listed above should be specified.

The combination of these three elements, **action type – source document type – destination document type** in this table specifies:

- Which type of **destination** document will be selected for the document creation process, when receipt actions are found with this specific action type and source document type.
- Which type of **source** document will be used in the case of ad-hoc receipts.



Transition Rule

Valid Transition: **101. ORP=>PRN** (Return of Receipt from Purchase return order)

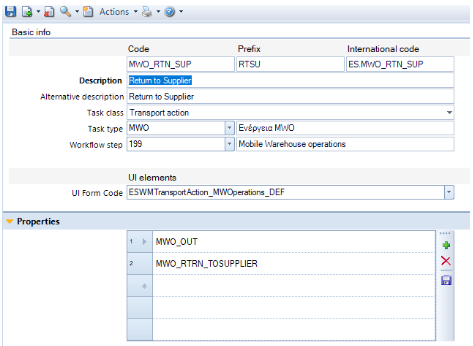
In the destination document type (Purchases receipt note), the transition rule should be specified (for example 101.ORP=>PRN).

The transition rule ensures:

- Replication of the header information of the Order, onto the generated document.
- Execution of the "Automatic quantity matching" procedure

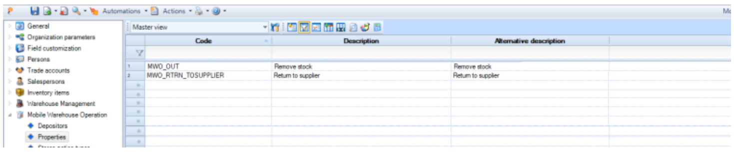
Action Type

The action type used is **MWO_RTN_SUP** Return to supplier, specified through the configuration settings (*see section:* ***Import configuration***).




Action type properties

The following action type properties specified through the configuration settings are being used. (*see section:* ***Import configuration***).




General Parameters

The following general parameters must be filled-in.

- **Property corresponding to Return to supplier**. The property entered here corresponds to the receipt action type(s) from a supplier. It is used in printing machines and processes to mark and group these action types.
- **Number of lines per doc.** Determines the number of lines a document can have. If the recording actions exceed this number, then multiple receipt documents are generated for the same order.
  The parameter is shared for ALL process flows.

| CATEGORY: Mobile Warehouse Operations - Customization | | |
|---|---|---|
| Return to supplier - attribute | Completion | MWO_RTRN_TOSUPPLIER |
| Number of lines by doc. | Completion | 500 |

In addition, in the same category, there are parameters for marking the documents. In facilities where this functionality is desirable, the user should decide in which document header field they wish to store this information and what the reserved value will be.

- **Document table field in which source channel is saved**. Here, the field of the document header is designated, which will be reserved for marking documents.
- **Value saved in a document table field, in the ones that derive from Mobile Warehouse Operation subsystem procedures.** In order to specify the value that is filled in by the procedure.

| CATEGORY: Mobile Warehouse Operations - Customization | | |
|---|---|---|
| Document table field in which source channel is saved | Completion | fADDimension1Code |
| Value which is saved in document table field in these derived from Mobile warehouse operation subsystem procedures | Completion | MWO |

Rules

In order to activate the online update and online document creation. This rule is SHARED for all procedures except for Stock Taking.

| Entity Transport action | | | | |
|---|---|---|---|---|
| 180 | ☑ | ☐ | Rule | Mobile warehouse operations: Online update |

## Receipt from Branch

This is logged when merchandise is received from the Head Office or another branch, in order for the warehouse item count to be updated. Due to the remote locations the warehouses are usually found in, it is often required that the stock is recorded on the shipment and destination parts at different times. For that purpose, it is recommended to use document types of "split updates", as shown below. The Order in this case is considered a Delivery Note from the head office or another branch.

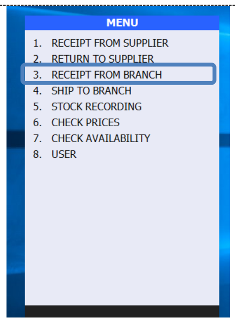
### Via Receipt order

Logging from the wireless terminal is as follows:

Specify task

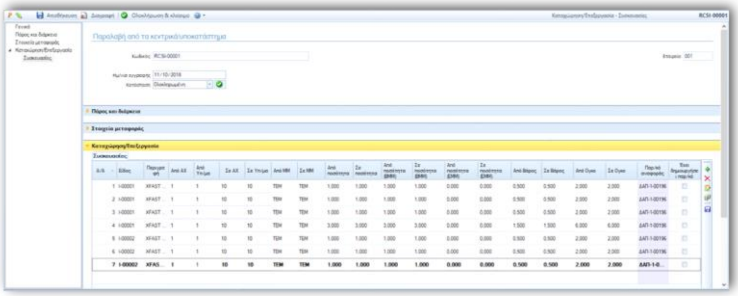
**3. Receipt from branch**

By selecting the task, the login branch is automatically selected.




Valid Action type: **MWO_RCPT_SITE** (Receipt from Company site)

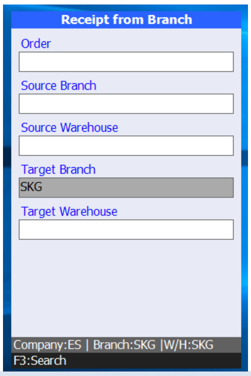
Valid Order type: **IWB** (Intra-warehouse transports to Branch)



**Specify order**

The intra-warehouse transports order is located. The search can be carried out by:

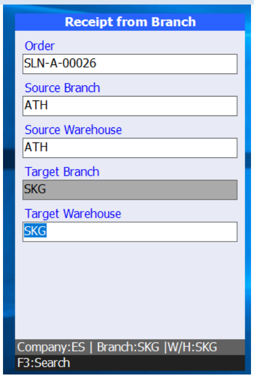
1. Using a Barcode document.
2. Searching from the list of intra-warehouse transports orders using the **F3** key.
3. Typing in the code




**Using a unique barcode identifier is recommended** to speed up the search time – order identification

**Specify Warehouses**

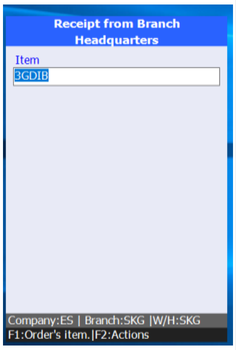
Locations are automatically specified based on the selected order. The user can select a different destination Warehouse using the **F3** key.



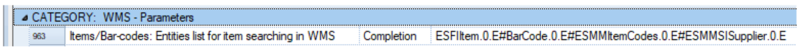

**Receipt items**

Here, the user enters the **items** received.

Finding items is possible with one of the usual search methods (*other than the code and barcode, there may be multiple item codes, coding of alternative suppliers etc.*). A barcode reader can also be used.




The item search is carried out in the areas specified in the general parameter.




**Using a unique barcode identifier is recommended** to speed up the search time – order identification

In addition, search is supported in fields:

LOTBarcode.0.E#LotCode.0.E#SNCode.0.E#SNBarCode.0.E

Where

LotCode : Lot code

LOTBarcode : Lot barcode

SNCode : Serial number code

SNBarCode : Serial number barcode

A general parameter follows the same logic as parameter: ***Items/Bar-codes: List of entity to search item to retail mode***.

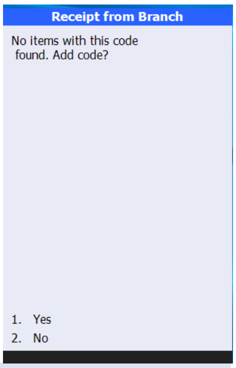
See corresponding articles in the Knowledge Base:

*KB-00130 - Search for items in Retail Mode*

*KB-00772 - Search for items in BarCode lot*

**Checking item compatibility**

When selecting an item, there's the possibility of checking the item's compatibility with the order. If the item selected does not belong to the order, the user is required to confirm.




Note that this feature can be configured. See more in section: **Wireless terminals configuration**.

**Select warehouse dimensions**

If the item monitors some of the warehouse dimensions, a screen to set dimensions follows.

**Fill in dimensions automatically, based on order**

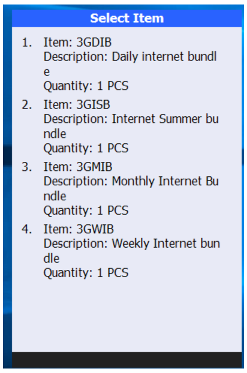
For the two unnamed warehouse dimensions in particular (Warehouse dimension 1 & Warehouse dimensions 2), it's possible to fill them in automatically.

After the item, color and size have been specified, probably using barcode, the order lines are reviewed, and if a unique value is found in warehouse dimension 1 or 2 for the relevant combination (item-color-size), it is filled in automatically. If the combination provided is not found at all (ad-hoc item delivery), or if more dimension values are found for the same combination, then the option stays blank and filling it manually is required.

Note that this feature can be configured. See more in section: **Wireless terminals configuration**.

**Select from order items**

Using the **F1** key you can view and select order items. With this option, other line information, such as measurement unit and warehouse dimensions are also suggested.




**Measurement units**

It is essential that the unit of **measurement** (or **packaging**) is correctly filled in. If only one unit of measurement has been Specifyd in the item, then this screen is skipped.

The measurement units available for selection are all item unit measurements, apart from the physical measurement units (weight, volume, surface area, etc.). Physical measurement units are only available if set as a basic or alternative item unit.

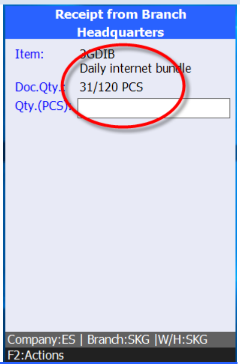
It is possible to automatically select the item's basic measurement unit. This feature is configurable. See more in section: **Wireless terminals configuration.**

**Specify quantity**

On this screen, the user can set the quantity to be received.

In addition, there's information on the progressive receipt of item in relation to the quantity and measurement unit of the order in field "**Doc.Qty**".

If the receipt takes place in a different measurement unit than that of the order, the measurement unit is changed to the one considered as **reference** measurement unit in this field.

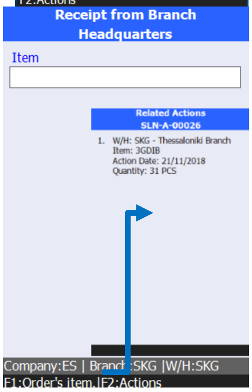



**Related actions**

During the process, it is possible to check the task progress.

Without designating an item, by using the **F2** key, one can see ALL actions related to an order for ALL items.

Whereas, if an item has been designated, then one can see the actions taken for the certain item up until now.

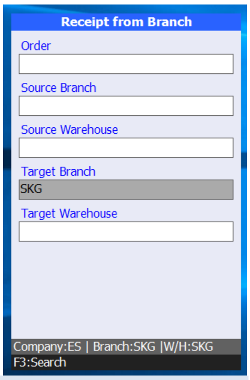


Repeat step

After confirming the quantity, the set item screen returns, in order for the user to proceed with a new item delivery.

Completion

By exiting back to home screen, the entry registration is **Complete** and a new process can start anew. Even if the same order is selected, a NEW action will be created.




An action being Completed, carried out by the above functionality, is an important action element, as **ONLY actions in the Completed state** are available to update and create the final document.

## Ad-hoc receipt

When there is no order, i.e. the Note from the shipping branch is not available, the procedure remains as presented in the previous section. HOWEVER, in this case, **an ad-hoc order is created**, that is, an order without item lines, just the header information.

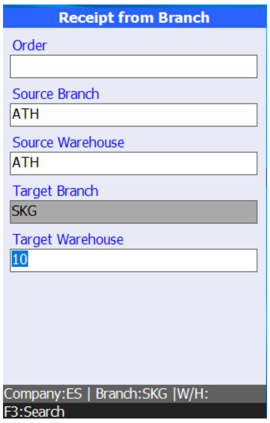
Specify task

| | |
|---|---|
| Valid Action type: | **MWO_RCPT_SITE** (Receipt from Company site) |
| Valid Order type: | **IWOR** (Intra-warehouse transport Order) |

Specify Locations

Entering the shipment and destination Branches and warehouses **obligatory** in this case. The process cannot continue unless these are filled in.

Searching for the locations is possible using the **F3** key.



## Order to WH en Route

When there are en route warehouses (virtual warehouses), the selection process of Shipping and Destination locations is different. In this procedure, although the Delivery Note from the head office is sent to the branch, the destination warehouse is specified as a "logical" warehouse of the branch. This allows for the branch's item count to be updated correctly. Upon delivery of the merchandise, a new shipping document is created, from the virtual warehouse to the real warehouse. In this case, the handling of the process remains the same as above, EXCEPT FOR the destination of the merchandise, which is now different.

**Specify task**

| | |
|---|---|
| Valid Action type: | **MWO_RCPT_SITE** (Receipt from Company site) |
| Valid Order type: | **IWR** (Intra-warehouse transport for reserved stock) |

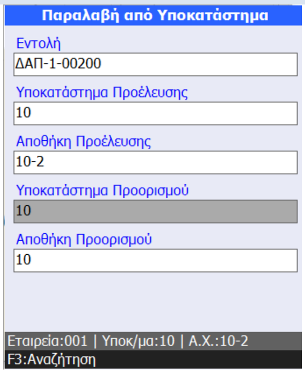
For the Order to be recognized as a shipment in process order to WH en route, the document's attribute should be: MWO_enRoute

**Specify Locations**

Specifying the Order is required. Upon completion, the branch and the Destination W/H of the order are suggested as Source (swap option).

The Destination Branch is always the login branch, while the warehouse designated as branch is suggested as the destination W/H.

The user can select a different destination W/S using the **F3** key.

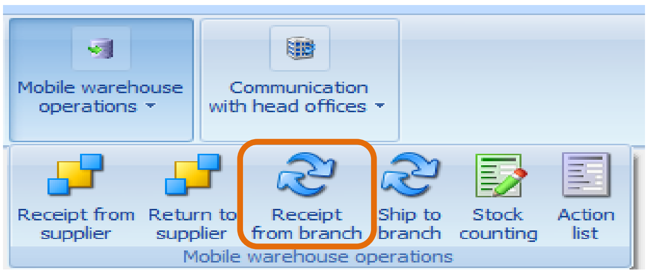



## Back-office operations

After the receipt action is Completed by the wireless terminal user, it's time for the receipt document creation process to continue. The logging actions are available in the **Receipt from supplier** option, on the menu node:

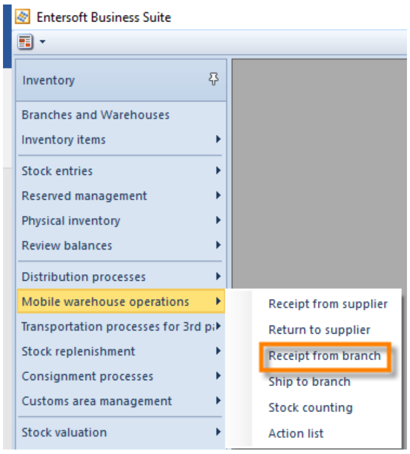
Entersoft Retail®

*Administration*|***Mobile Warehouse Operations***



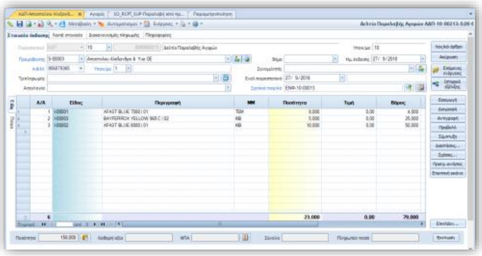
Entersoft Business Suite®

*Inventory*




General Data

| | |
|---|---|
| Valid Action type: | **MWO_RCPT_SITE** (Receipt from Company site) |
| Valid Doc type: | **IWB** (Intra-warehouse transports to Branch) |
| Valid Transition: | **470. IWB=>IBW** (Intra-warehouse transport to Receipt) |



Document Type and Series

The type of destination document is selected based on the Match types of actions - types of document table setting in the Depositor's form.

In order to select the series, the "Same series" setting overrides the rest, along with the transition type of document. In case this setting is not enabled, then one of the login branch series is selected.

Date

The document issue date is selected as the date of action execution.

Specify Position & Destination Locations

Both the Branch & the SHIPPING W/H, as well as the Branch and Destination W/H are updated from the locations specified in the logging action.

**Other header data**: The header information of the source document is copied to the destination document, based on the transition rule specified in the destination document type.

**Source**: The source of these documents receives the attribute "Procedure".

**Marking of documents**: In order to find them easily, it is possible to mark these documents in one of their header fields.

**Receipt items**: In the item section, the items are inserted along with the measurement unit, warehouse dimensions and quantities as recorded by the wireless terminal user.

> Note that line information is NOT transported from the order to the generated document.

**Close pending quantities**: *Automatic quantity matching* (backorder) is carried out, based on the transition rule specified in the target document type, in order for the Receipt Note to connect to the Order and to eliminate any "pending quantities".

> Any new recordings actions connected to the SAME order, are incorporated into the SAME receipt note.

## Update methods

There are three methods of updating \ creating a document. Each installation facility should choose the preferred method, based on the business organization model.

- Direct update

  Updating the logging actions immediately upon their completion can be done by activating rule: *Mobile warehouse operations: Online update*, which is available in the Transport Action entity (*menu: Tools and configuration / Development & customization tools)*.

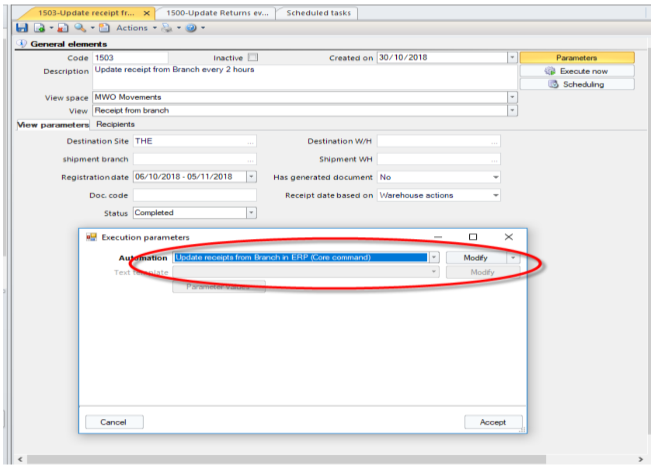

- Scheduled Update

  It is possible to create a new scheduled task (menu: *Tools and configuration|Schedule|Scheduled tasks*):

  Scroller area: MWO Movements

  Scroller: Receipt from branch

  Automation: Update receipts from Branch in ERP (Core Command)




- On-demand update
- Using the **Update receipts** option, which is available in the Receipt administration list from supplier (*menu: Inventory|Mobile warehouse operations|**Receipt from supplier***).
- The scroller displays the actions that are not yet part of a document, as actions to be updated. Filtered are:
  - ✓ the login branch actions
  - ✓ actions in the "Completed" state

## Configuration

In this section, one can view all of the configuration parts of the process.

Depositor

Valid Action type: **MWO_RCPT_SITE** (Receipt from Company site)

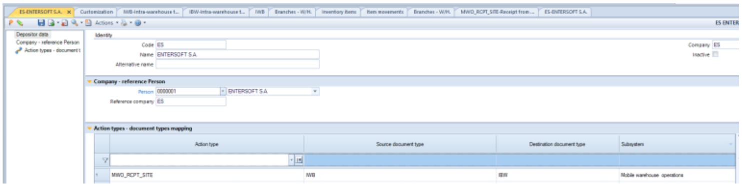
Valid Order type: **IWB** (Intra-warehouse transports to Branch)

Valid Doc type: **IBW** (Intra-warehouse transports from Branch)

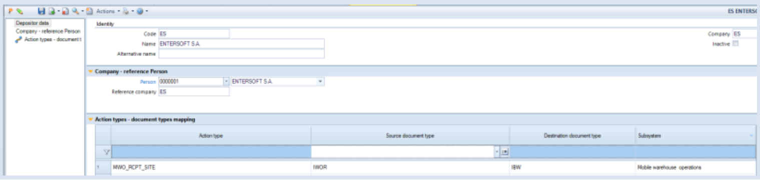
On the Action types – document types mapping table, on the depositors' screen (*menu: Customization|Mobile Warehouse Operation|Depositors*) the three configuration elements listed above needs to be specified.

The combination of these three elements, **action type – source document type – destination document type** in this table specifies:

- Which type of **destination** document will be selected for the document creation process, when receipt actions are found with this specific action type and source document type.
- Which type of **source** document will be used in the case of ad-hoc receipts.



⚠ It is emphasized that AND in the case of adhoc order the scenario for the use of types of documents - type of actions to the depositor should be Specifyd.



Transition Rule

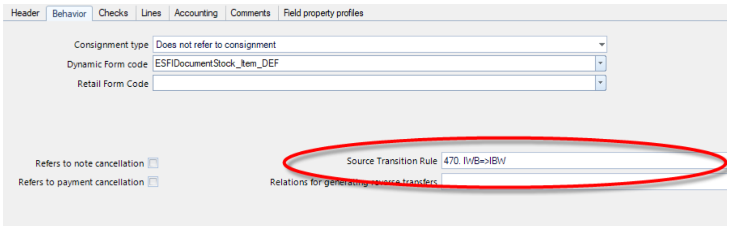
Valid Transition: **470. IWB=>IBW** (Intra-warehouse shipment note to Receipt)

In the destination document type (Receipt note), the transition rule should be designated (for example **470.IWB=>IBW**).

⚠ If the procedure has been launched with Returns Forecast from Branch, then transition rule 471. IWB=>IBW needs to be designated.

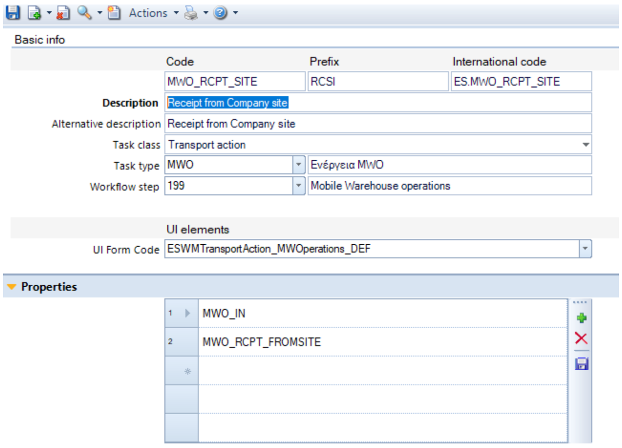
The transition rule ensures:

- Replication of the header information of the Order, onto the generated document.
- Execution of the “Automatic quantity matching” procedure




Action Type

The action type used is **MWO_RCPT_SITE** Receipt from Company site, specified through the configuration settings (*see section:* ***Import configuration***).




**Properties of action type**

The following action type properties imported through configuration are used. (*see section: **Import configuration***).

| | Code | Description | Alternative description | Inactive |
|---|---|---|---|---|
| 1 | MWO_IN | Add stock | Add stock | ☐ |
| 3 | MWO_RCPT_FROMSITE | Receipt from site | Receipt from site | ☐ |

**General Parameters**

The following general parameters must be filled-in.

| CATEGORY: Mobile Warehouse Operations - Customization | | |
|---|---|---|
| Property corresponding to receipt from branch | Completion | MWO_RCPT_FROMSITE |
| Number of lines by doc. | Completion | 500 |
| **Document type: Receipt order from branch** | **Completion** | **IWOR** |
| Flag movement documents as En route warehouse | Completion | MWO_enRoute |

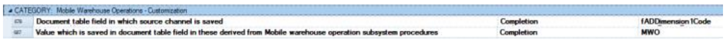
- **Property corresponding to Receipt from supplier**. The property entered here corresponds to the receipt action type(s) from a supplier. It is used in printing machines and processes to mark and group these action types.
- **Number of lines per doc.** Determines the number of lines a document can have. If the recording actions exceed this number, then multiple receipt documents are generated for the same order.
  The parameter is shared for ALL process flows.
- **Document type**: **Receipt order from branch**. This concerns cases of ad-hoc receipt.

  Valid Ad-hoc Order type: **IWOR** (Intra-warehouse transport Order)
- **Flag transport documents as En route Warehouse.** Specified in the document type which functions as an En route warehouse update process order.

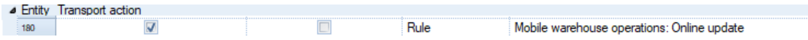
In addition, in the same category, there are parameters for marking the documents. In installation facilities where this functionality is sought for, it should be decided in which field of the document header the user wishes to store this information and what the reserved value will be.

- **Document table field in which source channel is saved**. Here, the field of the document header is designated, which will be reserved for marking documents.

- **Value saved in a document table field, in the ones that derive from Mobile Warehouse Operation subsystem procedures.** In order to specify the value that is filled in by the procedure.




Rules In order to activate the online update and online document creation. This rule is SHARED for all procedures except for Stock Taking.



# Ship to Branch

This task is logged when merchandise is shipped to the Head Office or another branch, in order for the warehouse item count to be updated and for the intra-warehouse transport document to be issued.

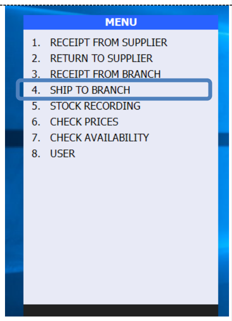
The process is similar to that of Receipt from branch. Therefore, it will not be presented in detail, except for any new parts, as well as configuration information.

## Via Receipt order

Specify task

**4. Ship to branch**

This is handled the same way as the case of "Receipt from supplier" that was presented in detail in the previous section.




| | |
|---|---|
| Valid Action type: | **MWO_SHIP_SITE** (Ship to Company site) |
| Valid Order type: | **IRO** (Intra-warehouse transport Return Order) |

## Ad-hoc shipping

When there is no shipping order, the procedure remains as shown in the previous section. HOWEVER, in in this case, an **ad-hoc order is created**, that is, an order without item lines, just header information.

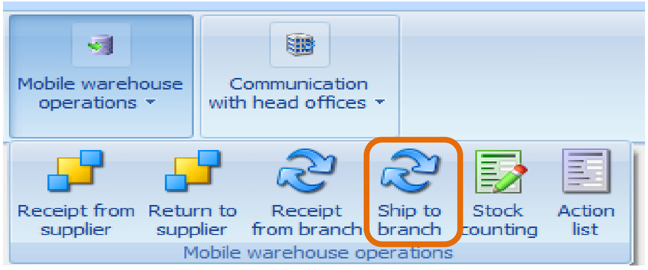
Specify task

| | |
|---|---|
| Valid Action type: | **MWO_SHIP_SITE** (Ship to Company site) |
| Valid Order type: | **IRO** (Intra-warehouse transport Return Order) |

## Back-office update

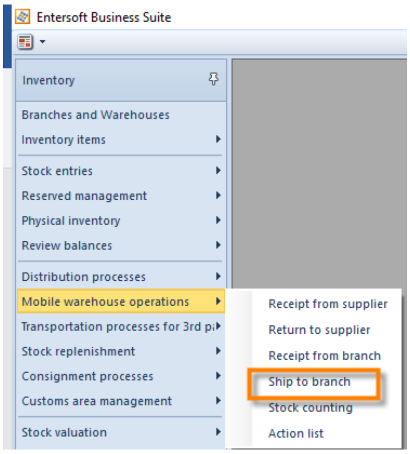
After the action has been Completed by the wireless terminal user, it's time for the receipt document creation process to continue. Logging actions are available in the **Ship to branch** option, on menu node:

Entersoft Retail® | *Administration*|***Mobile Warehouse Operations***



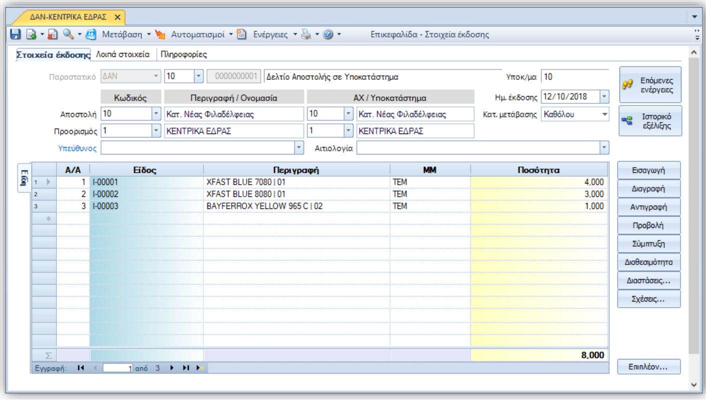

Entersoft Business Suite®

***Inventory***




General Data

| | |
|---|---|
| Valid Order type: | **IRO** (Intra-warehouse transport Return Order) |
| Valid Doc type: | **IWB** (Intra-warehouse transports to Branch) |
| Valid Transition: | **304. IRO=>IWB** (Return forecast to Intra-warehouse transport note) |



| | |
|---|---|
| Document Type and Series | The type of destination document is selected based on the Match types of actions - types of document table setting in the Depositor's form.<br><br>In order to select the series, the "Same series" setting overrides the rest, along with the transition type of document. In case this setting is not enabled, then one of the login branch series is selected. |
| Date | The document issue date is selected as the date of action execution. |
| Specify Position & Destination Locations | Both the Branch & the SHIPPING W/H, as well as the Branch and Destination W/H are updated from the locations specified in the logging action. |
| Other header data | The header information of the source document is copied to the destination document, based on the transition rule specified in the destination document type. |
| Source | The source of these documents receives the attribute "Procedure". |
| Marking of documents | In order to find them easily, it is possible to mark these documents in one of their header fields. |
| Receipt items | In the item section, the items are inserted along with the measurement unit, warehouse dimensions and quantities as recorded by the wireless terminal user.<br><br>Note that line information is NOT transported from the order to the generated document. |
| Close pending quantities | *Automatic quantity matching* (backorder) is carried out, based on the transition rule specified in the target document type, in order for the Receipt Note to connect to the Order and to eliminate any "pending quantities". |

It is emphasized that NOT transportring line information from t

document

Any new recordings actions connected to the SAME order, are incorporated into the SAME receipt note.

## Update methods

There are three methods of updating \ creating a document. Each installation facility should choose the preferred method, based on the business organization model.

- Direct update
- Updating the logging actions immediately upon their completion can be done by activating rule: *Mobile warehouse operations: Online update*, which is available in the Transport Action entity (*menu: Tools and configuration / Development & customization tools)*.

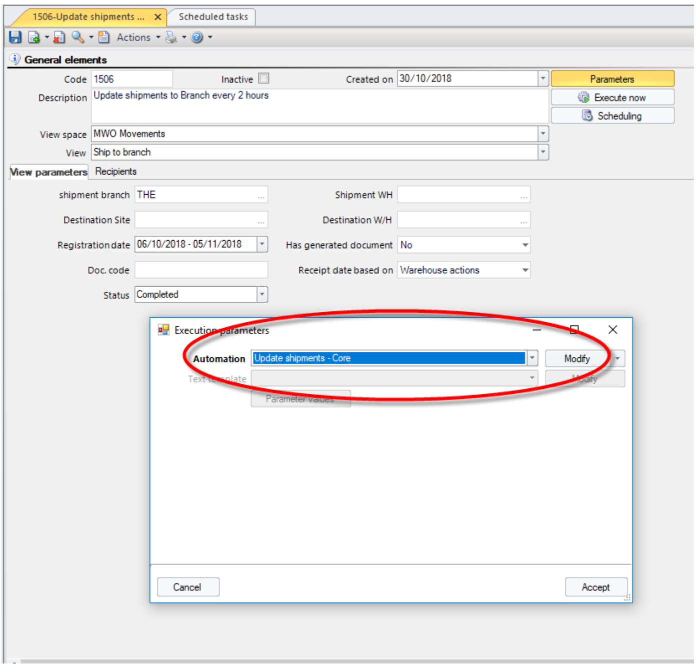

- Scheduled Update

  It is possible to create a new scheduled task (menu: *Tools and configuration|Schedule|Scheduled tasks*):

  Scroller area: MWO Movements

  Scroller: Ship to branch

Automation: Update shipments (Core)




- On-demand update
- Using the **Update receipts** option, which is available in the Receipt administration list from supplier (*menu: Inventory|Mobile warehouse operations|**Ship to branch***).

The scroller displays the actions that are not yet part of a document, as actions to be updated. Filtered are:

✓ the login branch actions

✓ actions in the "Completed" state

## Configuration

In this section, one can view all of the configuration parts of the process.

Depositors

Valid Action type: **MWO_SHIP_SITE** (Ship to Company site)

Valid Order type: **IRO** (Intra-warehouse transport Return Order)

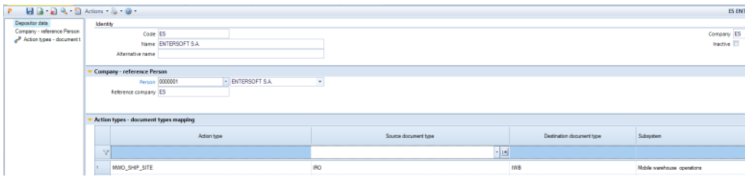
Valid Doc type: **IWB** (Intra-warehouse transports TO Branch)

On the Action types – document types mapping table, on the depositors' screen (*menu: Customization|Mobile Warehouse Operation|Depositors*) the three configuration elements listed above needs to be specified.

The combination of these three elements, **action type – source document type – destination**

**document type** in this table specifies:

- Which type of **destination** document will be selected for the document creation process, when receipt actions are found with this specific action type and source document type.
- Which type of **source** document will be used in the case of ad-hoc receipts.



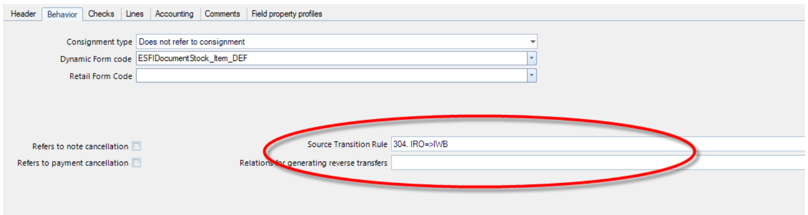
Transition Rule

Valid Transition: **304. IRO=>IWB** (Return forecast to Intra-warehouse transaction note)

In the destination document type (Intra-warehouse transports t Branch), the transition rule should be designated (for example **304. IRO=>IWB**).

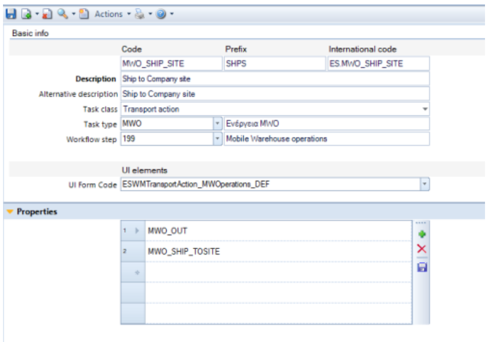
The transition rule ensures:

- Replication of the header information of the Order, onto the generated document.
- Execution of the “Automatic quantity matching” procedure




Action Type

The action type used is **MWO_SHIP_SITE** Ship to Company site, specified through the configuration settings (*see section:* ***Import configuration***).




Properties of action type

The following action type properties imported through configuration are used. (*see section:* ***Import configuration***).

General Parameters

The following general parameters must be filled-in.

| | Code | Description | Alternative description | Inactive |
|---|---|---|---|---|
| 2 | MWO_OUT | Remove stock | Remove stock | ☐ |
| 6 | MWO_SHIP_TOSITE | Ship to site | Ship to site | ☐ |

| CATEGORY: Mobile Warehouse Operations - Customization | | | |
|---|---|---|---|
| [illegible] | Property corresponding to shipment to branch | Completion | MWO_SHIP_TOSITE |
| [illegible] | Number of lines by doc. | Completion | 500 |

- **Property corresponding to Receipt from supplier**. The property entered here corresponds to the receipt action type(s) from a supplier. It is used in printing machines and processes to mark and group these action types.
- **Number of lines per doc.** Determines the number of lines a document can have. If the recording actions exceed this number, then multiple receipt documents are generated for the same order.
  The parameter is shared for ALL process flows.

In addition, in the same category, there are parameters for marking the documents. In installation facilities where this functionality is sought for, it should be decided in which field of the document header the user wishes to store this information and what the reserved value will be.

- **Document table field in which source channel is saved**. Here, the field of the document header is designated, which will be reserved for marking documents.
- **Value saved in a document table field, in the ones that derive from Mobile Warehouse Operation subsystem procedures.** In order to specify the value that is filled in by the procedure.

| CATEGORY: Mobile Warehouse Operations - Customization | | | |
|---|---|---|---|
| [illegible] | Document table field in which source channel is saved | Completion | fADDimension1Code |
| [illegible] | Value which is saved in document table field in these derived from Mobile warehouse operation subsystem procedures | Completion | MWO |

Rules

In order to activate the online update and online document creation. This rule is SHARED for all procedures except for Stock Taking.

| Entity Transport action | | | | |
|---|---|---|---|---|
| 180 | ☑ | ☐ | Rule | Mobile warehouse operations: Online update |

# Stock counting

The recording task of the inventory count, aiming to create a physical inventory document.

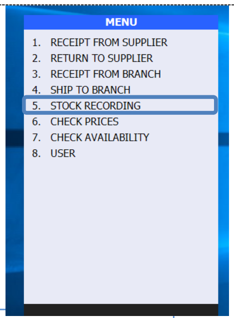
## Recording actions

Recording from the wireless terminal is carried out as follows:

Specify task

### 5. Stock counting

By selecting a task, the login branch and warehouse is automatically selected.




| | |
|---|---|
| Valid Action type: | **MWO_REC_STOCK** (Inventory) |
| Valid Order type: | **NO REQUEST IS REQUIRED** |

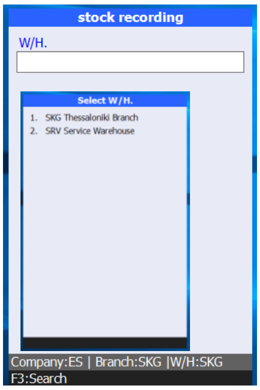
Specify Warehouse

Here, the user can select a storage area.

At the bottom of the screen, the company, branch, and warehouse are visible.

By using the **F3** key, one can select a different warehouse than the one suggested by the login branch.

Company:ES | Branch:SKG |W/H:SKG

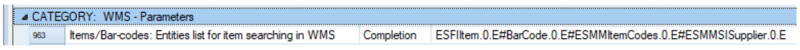



Items to be recorded

Here, the user can enter the **items** recorded.

Finding items is possible using one of the known search methods (*other than the code and barcode, there may be multiple product codes, coding of alternative suppliers etc.*). A barcode reader can also be used.

Item search includes the areas designated in the general parameter.



| | | | |
|---|---|---|---|
| CATEGORY: WMS - Parameters | | | |
| 963 | Items/Bar-codes: Entities list for item searching in WMS | Completion | ESFIItem.0.E#BarCode.0.E#ESMMItemCodes.0.E#ESMMSISupplier.0.E |

**Using a unique barcode identifier is recommended** to speed up the search time – order identification

In addition, search is supported in fields:

LOTBarcode.0.E#LotCode.0.E#SNCode.0.E#SNBarCode.0.E

Where

LotCode : Lot code

LOTBarcode : Lot barcode

SNCode : Serial number code

SNBarCode : Serial number barcode

A general parameter follows the same logic as parameter: ***Items/Bar-codes: List of entity to search item to retail mode***.

See corresponding articles in the Knowledge Base:

*KB-00130 - Search for items in Retail Mode*

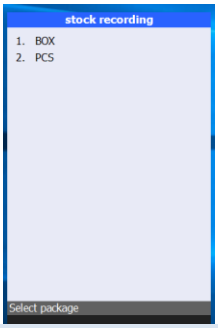
*KB-00772 - Search for items in BarCode lot*

Select warehouse dimensions

If the item monitors some of the warehouse dimensions, a screen to set dimensions follows.

Measurement units

It is essential that the unit of **measurement** (or **packaging**) is correctly filled in. If only one unit of measurement has been Specifyd in the item, then this screen is skipped.

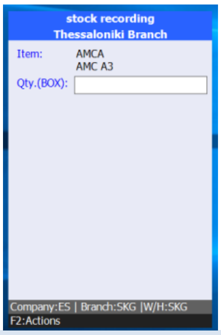



The measurement units available for selection are all item unit measurements, apart from the physical measurement units (weight, volume, surface area, etc.). Physical measurement units are only available if set as a basic or alternative item unit.

It is possible to automatically select the item's basic measurement unit. This feature is configurable. See more in section: **Wireless terminals configuration.**

**Specify quantity**

On this screen, the user can set the quantity received.



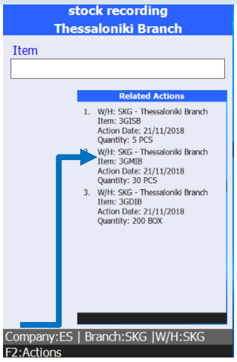

There is a possibility of automatic suggestion of quantity 1 as well as automatic confirmation of the suggested quantity. If enabled, then, once the item is designated, a quantity of 1 is automatically filled in the quantity field. If the second setting is activated too, then the process continues without requiring user confirmation.

See more in this section: **Wireless terminals configuration.**

**Related Actions**

During the process, it is possible to check the task progress.

Using the **F2** key, one can see ALL the stock counting actions for the specific storage location and date.

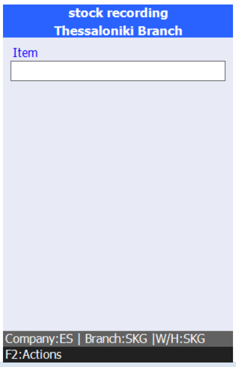



**Repeat step**

After confirming the quantity, the set item screen returns, in order for the user to proceed with a new item delivery.

**Completion**

By exiting back to home screen, the entry registration is **Complete** and a new process can start anew. Even if the same order is selected, a NEW action will be created.

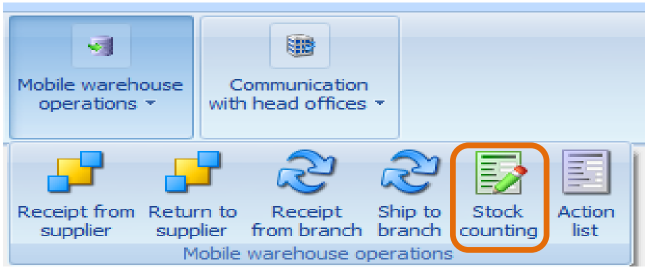



An action being completed, carried out by the above functionality, is an important action element, as **ONLY actions in the Completed state** are available to update and create the final document.

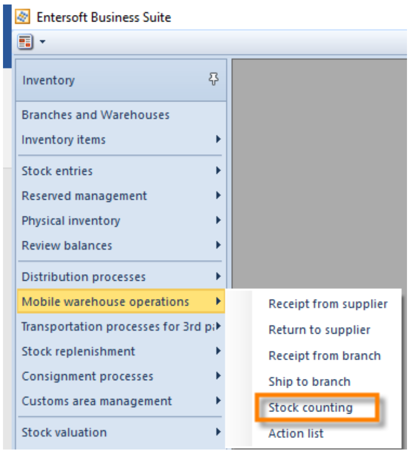
## Back-office operations

After the receipt action is Completed by the wireless terminal user, it's time for the receipt document creation process to continue. The logging actions are available in the **Stock counting** option, on the menu node:

Entersoft Retail® *Administration|**Mobile Warehouse operations***

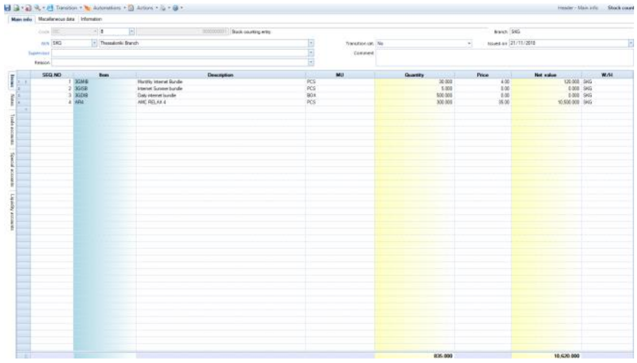



Entersoft Business Suite® ***Inventory***




General Data

| | |
|---|---|
| Valid Action type: | **MWO_REC_STOCK** (Inventory) |
| Valid Order type: | **NO ORDER IS REQUIRED** |
| Valid Doc type: | **ISC** (Stock counting entry) |



| | |
|---|---|
| Document Type and Series | The type of destination document is selected based on the Match types of actions - types of document table setting in the Depositor's form.<br><br>In order to select the series, the "Same series" setting overrides the rest, along with the transition type of document. In case this setting is not enabled, then one of the login branch series is selected. |
| Date | The document issue date is selected as the date of action execution. |
| Specify Position & Destination Locations | Both the Branch and Warehouse are updated from the locations specified in the logging action. |
| Other header items | No additional information to be entered. |
| Source | The source of these documents receives the attribute "Procedure". |
| Marking of documents | In order to find them easily, it is possible to mark these documents in one of their header fields. |
| Receipt items | In the item section, the items are inserted along with the measurement unit, warehouse dimensions and quantities as recorded by the wireless terminal user.<br><br>Note that line information is NOT transported from the order to the generated document. |

Any new recordings actions connected to the SAME order, are incorporated into the SAME receipt note.

## Update methods

There are three methods of updating \ creating a document. Each installation facility should choose the preferred method, based on the business organization model.

- Direct update

Updating the logging actions immediately upon their completion can be done by activating rule: *Mobile warehouse operations: Online update*, which is available in the Transport Action entity (*menu: Tools and configuration / Development & customization tools)*.

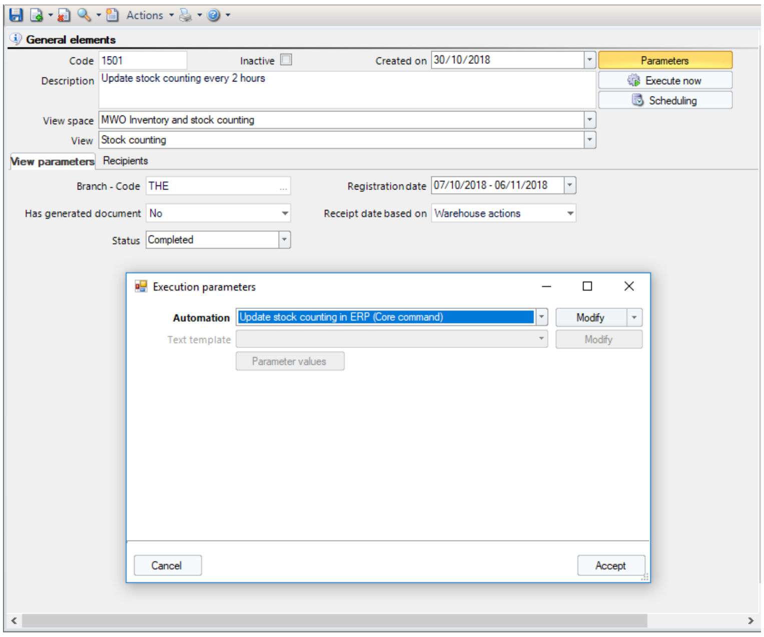

- Scheduled Update

  It is possible to create a new scheduled task (menu: *Tools and configuration|Schedule|Scheduled tasks*):

  Scroller area: MWO Inventory and stock counting

  Scroller: Stock counting

  Automation: Update stock counting (Core)




- On-demand update

  Using the **Update receipts** option, which is available in the Receipt administration list from supplier (*menu: Inventory|Mobile warehouse operations|**Stock counting**).*

The scroller displays the actions that are not yet part of a document, as actions to be updated. Filtered are:

- ✓ the login branch actions
- ✓ actions in the "Completed" state

# Configuration

In this section, one can view all of the configuration parts of the process.

**Depositors**

Valid Action type: **MWO_REC_STOCK** (Inventory)

Valid Order type: **NO ORDER REQUIRED**

Valid Doc type: **ISC** (Stock counting entry)

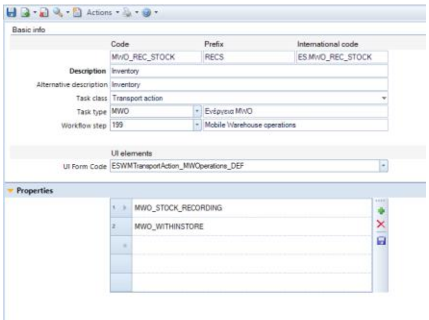
On the Action types – document types mapping table, on the depositors' screen (*menu: Customization\Mobile Warehouse Operation\Depositors*) the three configuration elements listed above needs to be specified.

The combination of these three elements, **action type – source document type – destination document type** in this table specifies:

- Which type of **destination** document will be selected for the document creation process, when receipt actions are found with this specific action type and source document type.

**Action Type**

The action type used is **MWO_REC_STOCK** (Inventory), specified through the configuration settings (*see section: **Import configuration***).




**Properties of action type**

The following action type properties imported through configuration are used. (*see section: **Import configuration***).

| | Code | Description | Alternative description | Inactive |
|---|---|---|---|---|
| 7 | MWO_STOCK_RECORDING | Stock recording | Stock recording | ☐ |
| 8 | MWO_WITHINSTORE | Internal stock action | Internal stock action | ☐ |

**General Parameters**

The following general parameters must be filled-in.

| CATEGORY: Mobile Warehouse Operations - Customization | | | |
|---|---|---|---|
| 682 | Property concerning stock recording | Completion | MWO_STOCK_RECORDING |
| 681 | Number of lines by doc. | Completion | 500 |

- **Property concerning stock recording.** The property entered in this field has been matched with the stock counting action type(s). These are used in printing machines and procedures, in order to mark and group these action types.
- **Number of lines per doc.** Determines the number of lines a document can have. If the recording actions exceed this number, then multiple receipt documents are generated for the same order.
  The parameter is shared for ALL process flows.

In addition, in the same category, there are parameters for marking the documents. In installation facilities where this functionality is sought for, it should be decided in which field of the document header the user wishes to store this information and what the reserved value will be.

- **Document table field in which source channel is saved**. Here, the field of the document header is designated, which will be reserved for marking documents.

- **Value saved in a document table field, in the ones that derive from Mobile Warehouse Operation subsystem procedures.** In order to specify the value that is filled in by the procedure.

| CATEGORY: Mobile Warehouse Operations - Customization | | | |
|---|---|---|---|
| [illegible] | Document table field in which source channel is saved | Completion | fADDimension1Code |
| [illegible] | Value which is saved in document table field in these derived from Mobile warehouse operation subsystem procedures | Completion | MWO |

Rules In order to enable the online update and online document creation.

| Entity Transport action | | | | |
|---|---|---|---|---|
| 182 | ☑ | ☐ | Rule | Mobile warehouse operations: Stock recording Online Update |

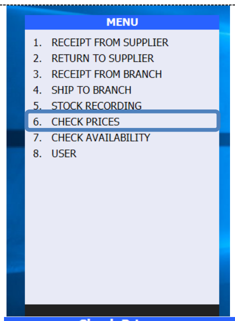
## Check prices

This option aims to promptly and accurately answer to the following question: "What is the current item selling price?".

Specify task

**6.Check prices**

The action is selected from the task menu.

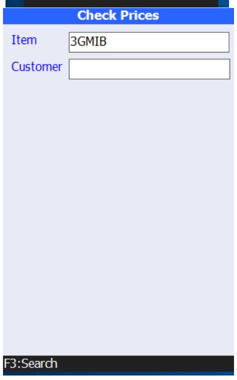



Specify item

Here, the user selects the **item**.

Finding items is possible with one of the usual search methods (other than the code and barcode, there may be multiple item codes, coding of alternative suppliers etc.). A barcode reader can also be used.

The item search is carried out in the areas specified in the general parameter.




| CATEGORY: WMS - Parameters | | | |
|---|---|---|---|
| 963 | Items/Bar-codes: Entities list for item searching in WMS | Completion | ESFIItem.0.E#BarCode.0.E#ESMMItemCodes.0.E#ESMMSISupplier.0.E |

**Using a unique barcode identifier is recommended** to speed up the search time – order identification

In addition, search is supported in fields:

LOTBarcode.0.E#LotCode.0.E#SNCode.0.E#SNBarCode.0.E

Where

LotCode : Lot code

LOTBarcode : Lot barcode

SNCode : Serial number code

SNBarCode : Serial number barcode

A general parameter follows the same logic as parameter: ***Items/Bar-codes: List of entity to search item to retail mode***.

See corresponding articles in the Knowledge Base:

*KB-00130 - Search for items in Retail Mode*

*KB-00772 - Search for items in BarCode lot*

Specify customer

Here, the user locates the customer. Searching for the customer is possible in the following ways:

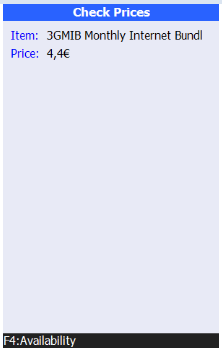
a. Search in the customer list using the **F3** key.
b. By typing part or the whole code, brand name or the VAT number of the customer.
c. Using a barcode

Specifying the customer is **optional**. It's useful in cases where the company has implemented pricing policies per trade account, or trade accounts groups (for example, special prices pricelists by customer category).

**Using a unique barcode identifier is recommended** to speed up the search time – order identification

Show price

Upon data confirmation on the previous screen, the price is displayed. The displayed price is the one that would be suggested in a retail document at the login branch, for the item and the specific customer, as long as it's been filled in.

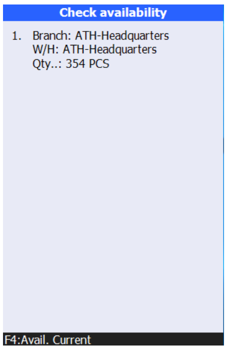



Check stock availability

On the same screen, using the **F4** key, one can instantly check the item's availability, both in the login branch and in other company branches.

Firstly, item stock is displayed for all branch warehouses.

Then, on this screen one can see the stocks in all company branches / WHs, using the **F4** key.



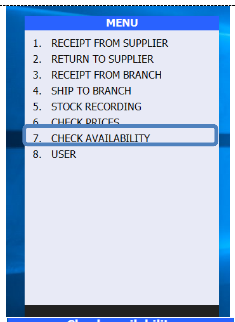

## Check availability

This option aims directly and accurately indicate stock availability

Specify task

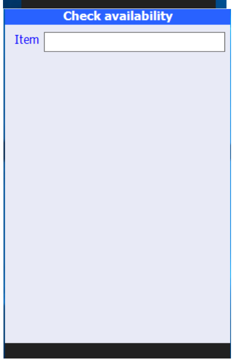
**7.Check availability**

The action is selected from the task menu.



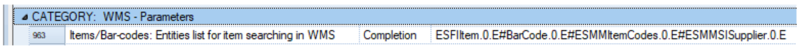

Specify item

Here, the user selects the **item**.




Finding items is possible with one of the usual search methods (other than the code and barcode, there may be multiple item codes, coding of alternative suppliers etc.). A barcode reader can also be used.

Item search is carried out in the areas specified in the general parameter.



| CATEGORY: WMS - Parameters | | | |
|---|---|---|---|
| 963 | Items/Bar-codes: Entities list for item searching in WMS | Completion | ESFIItem.0.E#BarCode.0.E#ESMMItemCodes.0.E#ESMMSISupplier.0.E |

**Using a unique barcode identifier is recommended** to speed up the search time – order identification

In addition, search is supported in fields:

LOTBarcode.0.E#LotCode.0.E#SNCode.0.E#SNBarCode.0.E

Where

LotCode : Lot code

LOTBarcode : Lot barcode

SNCode : Serial number code

SNBarCode : Serial number barcode

A general parameter follows the same logic as parameter: ***Items/Bar-codes: List of entity to search item to retail mode***.

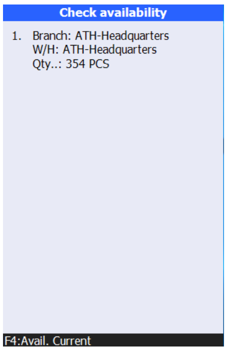
See corresponding articles in the Knowledge Base:

*KB-00130 - Search for items in Retail Mode*

*KB-00772 - Search for items in BarCode lot*

Check stock availability

On the same screen, using the **F4** key, one can instantly check the item's availability, both in the login branch and in other company branches.

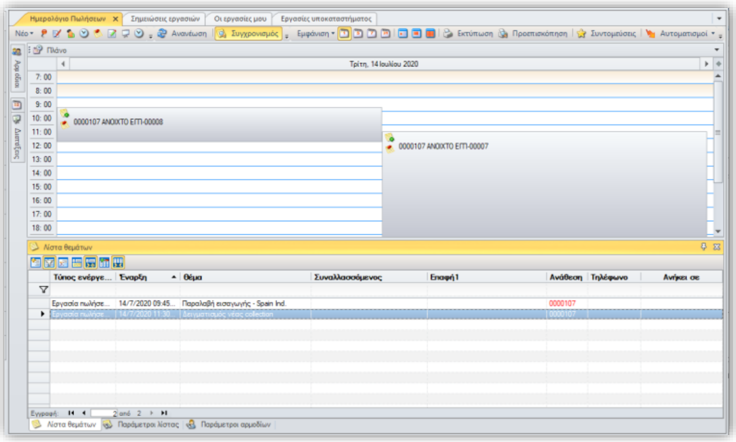



Firstly, item stock is displayed for all branch warehouses.

Then, on this screen one can see the stocks in all company branches / WHs, using the **F4** key.

## My tasks

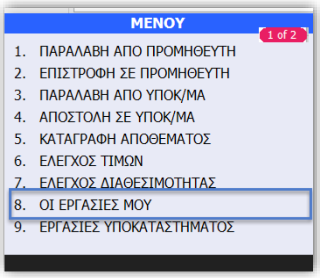
These are internal task notes. They aim to render the To-do task list available to the resource they've been assigned to. These tasks have been logged by the back-office using sales tasks (CRM Tasks).



Specify task

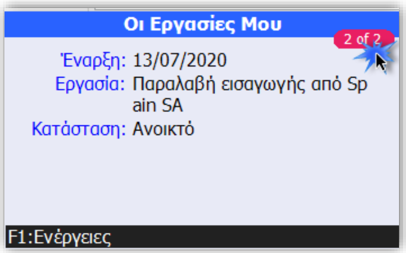
## 8. My tasks

This option can be selected from the task menu.




Show & manage tasks

By selection the "My tasks" menu option, Open tasks assigned to the resource are instantly displayed.




⚠ The list displays any tasks with Open/In process status for a 2-month time period.

Each task takes up one "page", where there's information on the start date, subject and status.

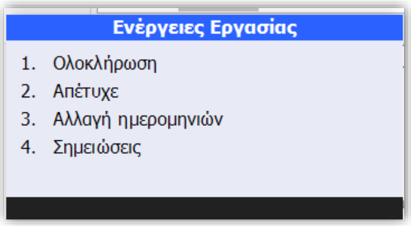
Page indication provides the user with the possibility to be aware of the total tasks assigned to them.

Actions

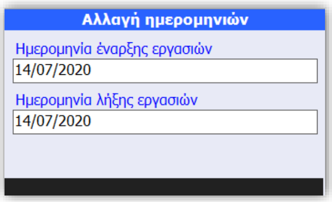
The below actions are available by pressing the F1 key:

a. Completed. Using the action, the Task's status changes from "In progress" to "Completed", indicating its successful execution.

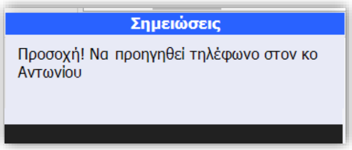
b. Failed. Accordingly, the Task status changes, indicating its unsuccessful execution.




c. Change date. Change the default date interval.



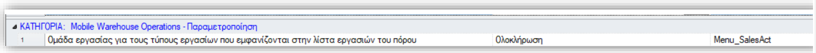

d. Notes. Show any notes integrated to the task.




## Configuration

In this section, all the configuration parts of the procedure are found.

**Available task types** The tasks displayed on the resource's list, are the ones whose type (ESTMTaskType) has been connected with the resource group specified in the general parameter:



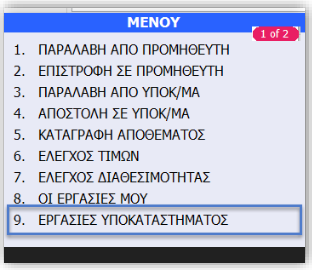

## Branch tasks

These are internal task notes. The aim is to render a general branch task list available, concerning tasks that have not been assigned to a specific resource and can be executed by all of a department's resources. These actions have been logged using sales tasks or general tasks (CRM Tasks).

Specify task

## 9. Branch tasks

This action can be selected from the task menu. Upon selection, the login branch is automatically selected.




Show & manage tasks

Upon selecting the "Branch tasks" menu options, Open tasks without a specified resource are instantly displayed.

⚠ The list displays any tasks with Open/In process status for a 2-month time period.

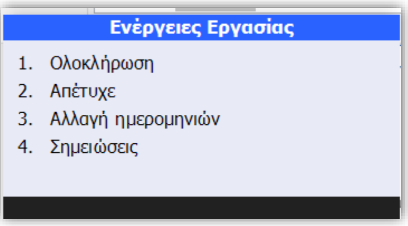
Each task takes up one "page", where there's information on the start date, subject and status.

Page indication provides the user with the possibility to be aware of the total tasks assigned to them.

Actions

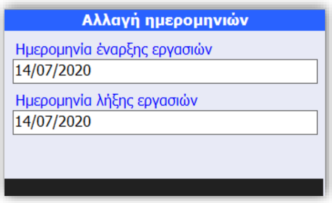
The below actions are available by pressing the F1 key:

a. Completed. Using the action, the Task's status changes from "In progress" to "Completed", indicating its successful execution. At the same time, the task is also updated with the resource that executed it.

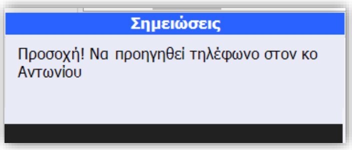



b. Failed. Accordingly, the Task status changes, indicating its unsuccessful execution. At the same time, the task is also updated with the resource that executed it.

c. Change date. Change the default date interval.




d. Notes. Show any notes integrated to the task.



## Configuration

In this section, all the configuration parts of the procedure are found.

**Available task types**

The tasks displayed on the resource's list, are the ones whose type (ESTMTaskType) has been connected with the resource group specified in the general parameter:

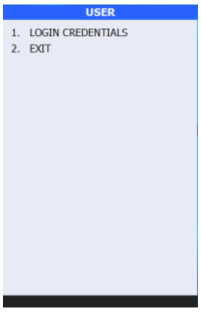
| | | | |
|---|---|---|---|
| ΚΑΤΗΓΟΡΙΑ: Mobile Warehouse Operations - Παραμετροποίηση | | | |
| 1 | Ομάδα εργασίας για τους τύπους εργασιών που εμφανίζονται στην λίστα εργασιών του πόρου | Ολοκλήρωση | Menu_SalesAct |
| 2 | Ομάδα εργασίας για τους τύπους εργασιών που εμφανίζονται στην λίστα συμβάντων του καταστήματος | Ολοκλήρωση | Menu_GeneralTasks |

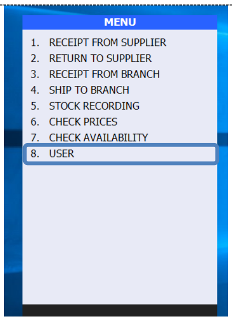
## User Details & Exit

**Specify task**

### 8.User

In this option, there's user information available, as well as the option to exit the application.



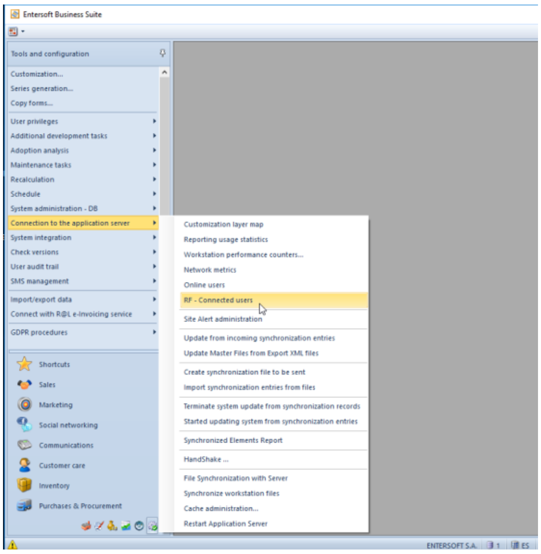




## Manage wireless terminal user connections

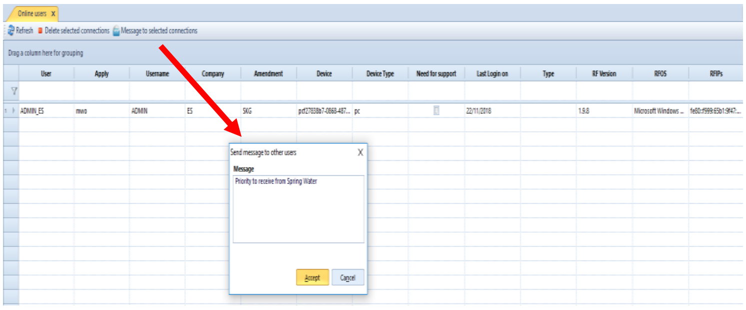
This is an extension to the already existing application management functionality of logged-in users, by the application administrator targeted at active wireless terminal users. Using it, it's possible to:

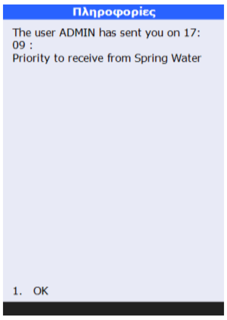
- Send messages to users
- Stop / delete active connections

This functionality can be invoked by going to the "Tools & configuration" menu and selecting the "Connection to the application server" option.




Example of sending a message to users:

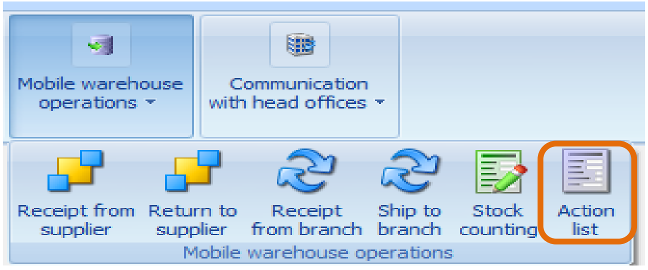



## Monitor actions

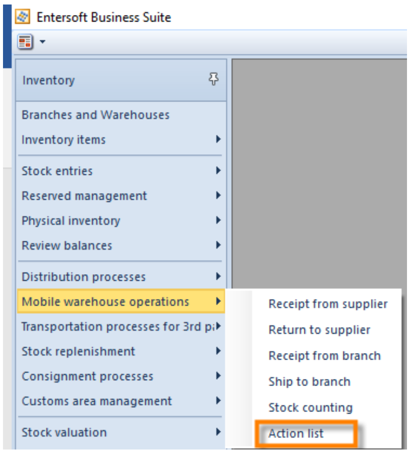
Using the **Action List** menu option, available in the *Administration|**Mobile warehouse operation*** menu node, it is possible to check the logging actions carried out.

Entersoft Retail® | *Διαχείριση|**Mobile warehouse operation***




Entersoft Business Suite®

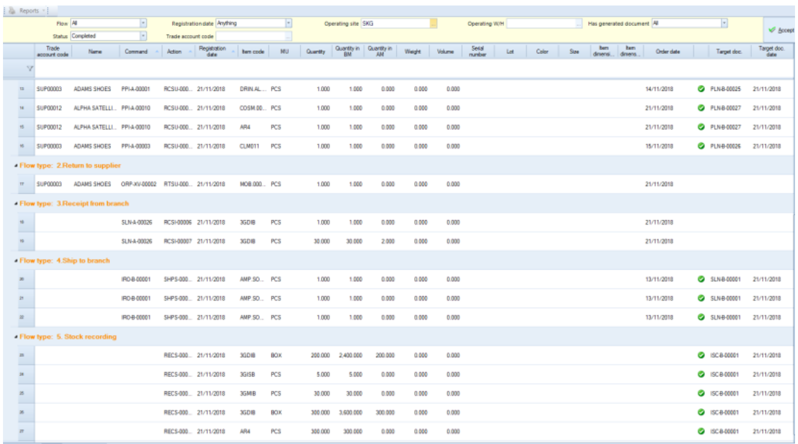
*Inventory*



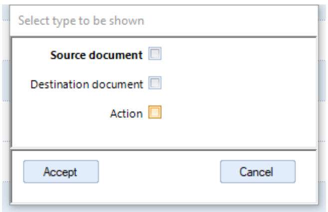

This view is an action checklist.

The login branch entries are filtered through the "Operation site" criterion.

Entries are displayed per branch and flow/process type. Any actions that are part of a document are marked with the icon, while the destination document's code and date of issue are also available.

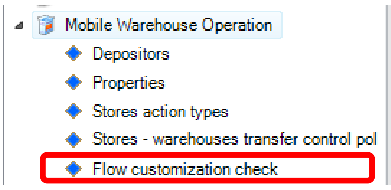


By **double clicking** on a selected line, it's possible to choose to display either the source or destination document, or the logging action, or even show all, in index pages.

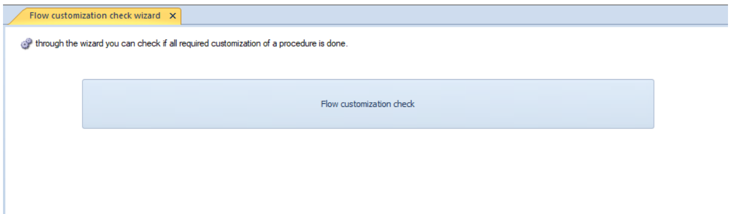



## Check configuration

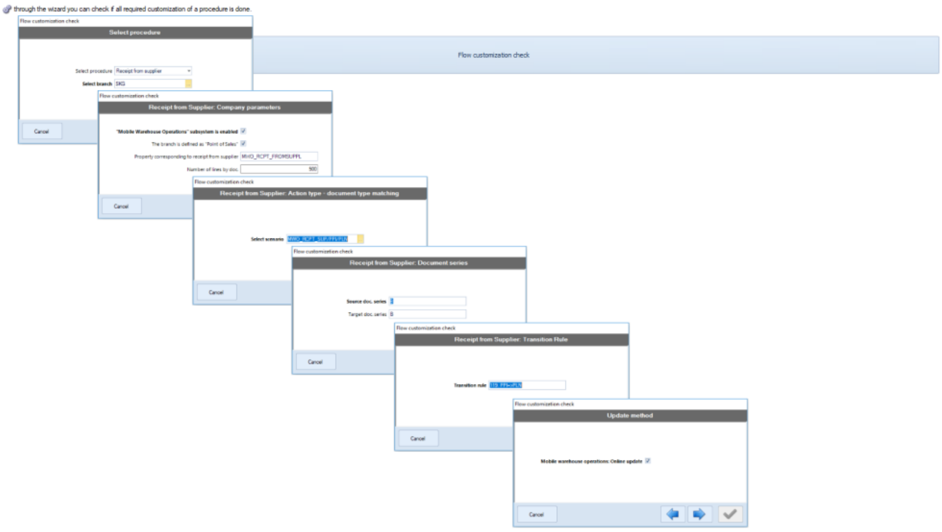
In order to facilitate configuration tasks, a process was created to check configuration accuracy. It's available under menu option: Configuration\Mobile Warehouse Operations\Flow configuration check.




Incomplete configuration results in failure to execute tasks. For this reason, having a check step that comes earlier in the process is useful.




Using a wizard and after selecting the procedure type and check branch, the process displays and checks all the configuration elements as they were presented in the "Configuration" section of each flow. If any data are lacking, the appropriate instructions are provided in order to rectify them.




The process is only available to application Administrators, as well as user group *MWOBOAdmin*.

## Wireless terminals configuration

Aiming to ensure both data accuracy and facilitation of wireless terminal users, it is possible to configure some of their control points, based on the installation facility's operation mode.

| Parameter | Explanation | Suggested price |
|---|---|---|
| DateRangeInterval | A parameter that determines the order time-to-search range in all process flows. | ESDATERANGE(DAY,-30,DAY,30) |
| MAX_QTY_VALUE | Maximum value in quantity fields | 999999 |
| ACTION_TYPE_RECEIPT_SUPP | International ID for Receipt Action from a supplier | ES.MWO_RCPT_SUP |
| ACTION_TYPE_RTN_SUP | International ID for Shipping Action to a supplier | ES.MWO_RTN_SUP |
| ACTION_TYPE_RECEIPT_SITE | International ID for Receipt Action by a branch | ES.MWO_RCPT_SITE |
| ACTION_TYPE_SHIP_SITE | International ID for Shipping Action to a branch | ES.MWO_SHIP_SITE |
| ACTION_TYPE_REC_STOCK | International ID for Stock taking Action | ES.MWO_REC_STOCK |
| CHECK_ITEM_ORDER_COMPATIBILITY | Enables check to determine whether the item belongs to the order. | True |

| | | |
|---|---|---|
| QTY_DEFAULT_VALUE | Automatic suggestion of quantity 1 in all process flows, except for counting. | False |
| QTY_ISEDITABLE | Specifies whether the suggested quantity of 1 will be automatically confirmed.<br><br>Taken into consideration ONLY IN CASE THE QTY_DEFAULT_VALUE IS TRUE | True |
| REC_STOCK_QTY_DEFAULT_VALUE | Automatic suggestion of quantity 1 for Stock taking | True |
| REC_STOCK_QTY_ISEDITABLE | Specifies whether the suggested quantity of 1 will be automatically confirmed.<br><br>Taken into consideration ONLY IN CASE THE REC_STOCK_QTY_DEFAULT_VALUE IS TRUE. | False |
| AUTO_SELECT_BASE_MU | Enables automatic selection of the basic item measurement unit. | False |
| FLOWS_FOR_AUTOCOMPLETE_STOCKDIM1 | Determines whether the value will be automatically filled field Item dimension 1. It can be enabled per workflow. Holds values 0 & 1. Value 0 disables the functionality, while value 1 enables it.<br><br>**1.** 1st concerns Receipt from supplier<br>**2.** 2nd concerns Return to supplier<br>**3.** 3rd concerns Receipt from branch<br>**4.** 4th concerns Ship to branch<br><br>Example<br><br>If the desired flows are Receipt from supplier & Return to supplier, then the value must be set as 1100. | |
| FLOWS_FOR_AUTOCOMPLETE_STOCKDIM2 | Determines whether the value will be automatically filled field Item dimension 2. It can be enabled per workflow. Holds values 0 & 1. Value 0 disables the functionality, while value 1 enables it.<br><br>**5.** 1st concerns Receipt from supplier<br>**6.** 2nd concerns Return to supplier<br>**7.** 3rd concerns Receipt from branch<br>**8.** 4th concerns Ship to branch<br><br>Example<br><br>If the desired flows are Receipt from supplier & Return to supplier, then the | |

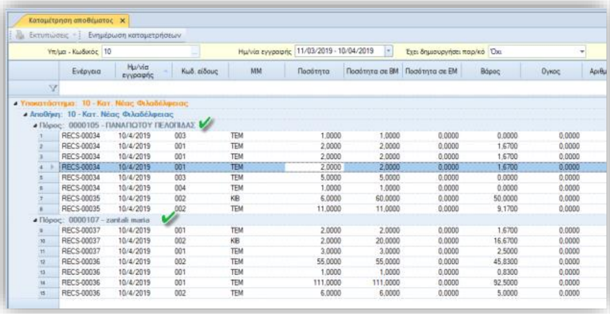
| | | |
|---|---|---|
| | value must be set as 1100. | |
| | | |

In order to differentiate between the above parameters, file Config.xaml should be copied from: *\ESRF\MWO* to: *CSRF\MWO\Modules\MyConfig* and then set the desired values.

# More from READMES

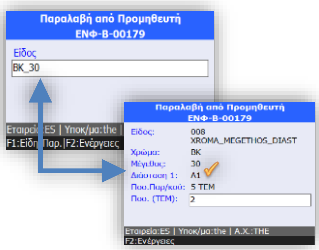
## Stock taking

The **Update stock counting** process has been enriched and hereafter the resource-user of the wireless terminal is considered during the document creation process. Hence, individual documents are created based on Branch, Warehouse, Action date and Resource. The Resource is saved in the Counterparty field of the document's header.



## Automatically fill in item dimensions via order

Henceforward, **Item dimension 1 or/and Item dimension 2 will be automatically filled in based on the order,** when selecting an item for all actions through the wireless terminals. After specifying the item, color and size, probably by using a barcode, the order lines are being scanned and in case a unique value is found in item dimension 1 or 2 for this combination (item – color – size), it is automatically filled out. If the given combination is not found (ad-hoc item receipt), or more dimension values are found for the same combination, then the field remains blank and it must be filled in by the user.




This is configured per workflow. It is specified by using the new wireless terminal parameters: *FLOWS_FOR_AUTOCOMPLETE_STOCKDIM1* and *FLOWS_FOR_AUTOCOMPLETE_STOCKDIM2* **Config.xaml** file.

If the above parameters need to be configured, then the **Config.xaml** file must be copied from: *\ESRF\MWO* to *CSRF\MWO\Modules\MyConfig* and the desired values can then be set.