

Getting started



This is a step-by-step manual to get started with Ongoing Warehouse. It describes the basics of the system and will guide you through a number of tasks in purpose to get you familiar with the system by following the steps in your own system. More detailed information can be found in the manual, which you can download from the help page in Ongoing.

This guide is divided into four parts.

Standard Order Flow

- Add a goods owner
- Add an article
- Receive goods
- Add a customer
- Place an order
- Do an outbound delivery

Economy Module

- Setting up a price list
- Add an invoice
- Create an invoice specification

Integrations

- Integrations to other systems
- Ongoing API & developer page

Additional guides

- Customer login
- Create/change stock locations
- Use inbound orders

Standard Order Flow

The most basic standard order flow contains an inbound- (receiving goods) and an outbound delivery. The first time you do this you have to add a article and a customer to the system. It also requires that a goods owner is created and that the warehouse contains at least one stock location. In most systems you will find stock location A1 and A2, which you can use for testing purposes. We will use those in the following steps. If you want to add your own locations before starting the guide, please follow the steps in the additional guide "add locations".

Here, we will guide you through the following steps

- [Add a goods owner](#)
- [Add an article](#)
- [Receive goods](#)
- [Add a customer](#)
- [Place an order](#)
- [Do an outbound delivery](#)

Add a goods owner

Registers	Settings	System
Registers	Groups	Types
Goods Owners	Customer Groups	Order Types
Transport Companies	Supplier Groups	InOrder Types
Transport Agreements		
Return Causes	Articles	Import
Adjustment Causes	Goods Status	Inorder
	Article Categories	Order
	Article Groups	Articles
	Article Classes	Customers
	Item Classes	Dangerous Goods
		WSI Import

In Ongoing, you always work towards an active goods owner, i.e. your customer. You select which goods owner to work with in the drop down list in the upper right corner. Everything you do in the system, such as creating articles, placing orders or debiting will be bound to this goods owner. Note that it's not possible to work towards many goods owners at the time, but you can in some views view data from all goods owners at the time e.g. the order list.

To create a new goods owner go to "Register" → "Goods owners"

☐ Admin
 Goods Owner*

 Customer Code

 Goods location code

 Contact reference

 Goods Sender Reference

 Goods owner's notification e-mail

☐ Single article locations
 Default Article Item Status

 Warehouse Address

 Group

 Goodsowner comment

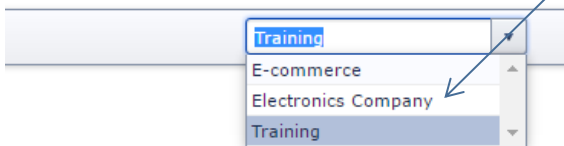
☐ Contact Information
☐ Communication
☐ Organisation

Logo
 Ingen fil har valts
☐ Manipulate size

Type the name of the goods owner. You can fill in additional information, but it is not required. If you want to add the goods owner address, check the box "Contact information". The address can later be placed on e.g. delivery notes or waybills.

Press "Create" to save the goods owner.

You are logged in as: ou



You can now find the goods owner in the drop down list in the upper right corner.

If you cannot find the goods owner in the drop down list your user account is not showing all goods owners in the system. To change the setting of your user account, go to "Settings" → "Users", select your user account in the list of users and check the new goods owner in the list of goods owners. Press Save. If you cannot do this, ask the administrator of your Ongoing to set the new goods owner as visible for your account.

Add an article

Warehouse	Economy	Goods Flow	Statistics	Misc	Registers	Set
Goods handling	Articles	Stock movements				
Receive Goods	Update Goods Info	Stock Movement				
Deliver	Articles	Movement Orders				
Pick Orders						
Return Orders	Inventory	Warehouse				
	Stock-taking	Warehouse Map				

From "Warehouse" → "Articles" you create article definitions for each type of article you will handle in the system.

In this example, we created the article "Circuit board X7" with article number 1856. We selected the unit to be "box." This is the smallest stock keeping unit (SKU), and implies that all orders will be placed in number of boxes.

We have set the weight per SKU i.e. Box as 20 kg.

We can state the number of boxes that a pallet contains. This can be used for charging rent or calculating the number of pallets currently in stock. This number will always be calculated as number of boxes/number of boxes on a pallet, i.e. the system will consider two half pallets as a full pallet.

We can also state the sub quantity per SKU, here we have 12 boards in a box, but we still consider a box to be one unit of this product.

If you will use scanning you can add the barcode(s) to the article definition.

Create new article

Article Name <input type="text" value="Circuit board X7"/> Article number * <input type="text" value="1856"/> Article Group <input type="text" value=" < None >"/> Article category <input type="text" value=" < None >"/> Unit <input type="text" value="Box"/> Barcode <input type="text"/> Factory Code <input type="text"/> Supplier <input type="text" value=" < None >"/> Supplier ArticleNo <input type="text"/> <input type="checkbox"/> Article structure <input type="checkbox"/> Production Article Description <input type="text"/>	Properties Weight <input type="text" value="20"/> Volume <input type="text"/> Length Width Height <input type="text"/> <input type="text"/> <input type="text"/> Article quantities Items per Pallets <input type="text" value="8"/> Pieces Per Carton <input type="text"/> Subquantity per SKU <input type="text" value="12"/> Storage Stock Location <input type="text"/> Article storage priority <input type="text"/> <input type="checkbox"/> Obsolete	Customs Stat. Number <input type="text"/> Country of origin <input type="text" value=" < Not Known >"/> Economy Purchase price Currency <input type="text"/> <input type="text"/> Stock valuation price <input type="text"/> Customer price <input type="text"/> Purchase Stock limit <input type="text"/> Min inbound quantity <input type="text"/>
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More information: If you cannot see all fields, some of them might be hidden. Contact us to hide or unhide fields.

Receiving goods – inbound delivery



Articles		
Warehouse	Economy	Goods Flow
Statistics		
Misc		
Registers		
Set		
Goods handling	Articles	Stock movements
Receive Goods	Update Goods Info	Stock Movement
Deliver	Articles	Movement Orders
Pick Orders		
Return Orders		
Inventory		Warehouse
Stock-taking		Warehouse Map

☐ Inorder Article

Article number	Name	Article Group	Unit
1856		< All >	< All >
1856	Circuit board X7		

Circuit board X7
 1856
 20 kg
 8 / Pallet
 Box
[New](#) [Edit](#)

Count *
 10 ☐ Show location suggestion

Stock Location*
 A1

☐ More fields
 Serial Number

Batch
 L15

Case no

Inbound date

Item status
 < None >

Expiry Date

Comment

Uncheck "Inorder" if checked

Inorders are used to advise an upcoming inbound delivery.
 See additional guide for help on how to use inorders.

Select an article in the list, or as we have done, search for an article by name or number in the search fields above.

Enter the received amount and a location to place the goods. Since we selected the stock keeping unit as boxes we are now receiving 10 boxes of Circuit Boards X7.

You can add additional information, such as batch or expiry date, but it is not mandatory.

Press save.

More information: By checking "show stock location suggestion" suggestions on where to stock the goods are shown. The algorithm for suggesting locations can be modified. Contact Ongoing to adjust the suggestions.

Add a customer

Order	Warehouse	Economy	Goods Flow	Statistics	Misc	Register
Outbound	Inbound	Customers				
Create Order	Create Inorder	Customer				
Add To Order	Inorder List					
Order List		Suppliers				
		Suppliers				

Fill in the information you want to save on the customer card. Name and address are mandatory. Here we have filled in the details for the customer Anna Andersson. Press Create when you are done.

▼ Create New Customer

Customer*

Anna Andersson

Customer Number

12584

Customer group

< None >

Address *

Long street 385

ZipCode*

88564

City*

Big City

Country

Sweden

Delivery Instruction

Map

Comment

Notifications

Telephone

☐ Telephone Notification

Mobile Phone

☐ Notify

Email

☐ Notify

Create

Update

Delete

Clear

More information: If you want to add a deviating delivery address, save the customer, find it in the list of customer and press "select". You can then see a box named "Delivery addresses" to the right where you can add new addresses on a customer.

Create an order

Order	Warehouse	Economy	Goods Flow	Statistics	Misc	Register
Outbound	Inbound	Customers				
Create Order	Create Inorder	Customer				
Add To Order	Inorder List					
Order List		Suppliers				
		Suppliers				

More information: Orders can be placed in several ways. Either you or your customer can place the order manually, it can be imported from excel or sent to Ongoing by an integrated system. For customers to be able to place orders manually, they need a customer login, where they can, in addition to placing orders, see the stock level or place inorders. See Additional guides for help on setting up a customer login.

An order is created in two steps.
First the order is created, then
goods are placed on the order. Here
you will create the order by
selecting the customer and freight
details.

You can also create new customers
or changing an existing customer by
pressing "New customer" or "Edit
customer" respectively.

Press "Create" to be redirected to
the next step where you select
goods to be placed on the order.

☐ Show all fields

Customer

Customer Name	Customer Number
<input type="text"/>	<input type="text"/>
<div>Anna Andersson 12584</div>	
Anna Andersson 12584 Long street 385 88564 Big City	
New deviating delivery address New Customer Edit customer	

Delivery Date*
 2016-05-13

Goods Owner Order Number

Reference

Comment

Create

Update

Notifications

☐ Email notification
☐ SMS notification
☐ Phone notification

Freight

Freight Payment
 Sender Pay

Freight Agreement
 Snabbtransportören

Snabbtransportören
 Kundnummer: 1

[New Deal](#) [Edit](#)
 Mark

Delivery Instruction

Receivers Pallet Registration Number

Here we have searched for all products containing X7 in their names by typing %X7% in the name search field.

Write the amount of goods you want to add and press the shopping cart to add articles to the order, here 2 boxes of the circuit board X7.

The goods you have now placed on the order is shown in the box to the right of the list of articles. Press "X" if you want to remove an article.

1 Max 100 [Export To Excel](#)

☒ Show articles not in stock
☐ Show only items on order

Article number Name [Search](#) [Clear](#)

Article	Article no	Article Group	Booked	Count	Net	Unit	Stock days	Locked	Count	Add	Delete
Circuit board X7	1856		2	10	8	box	0	0	2		

Order info [Edit](#)

Anna Andersson
 12584
 Long street 385
 88564 Big City

Transporter: Snabbtransportören

Article no	Article	Count	
1856	Circuit board X7	2	

[Close](#) [Cancel](#) [Remove](#)

Press "Close" when you finished editing the order. If you want to save and complete later, press "Cancel". The order will then be set to status "Open" instead of "Picking".

Out bound delivery

Order > Order List

Order Warehouse Economy Goods Flow Statistics Misc Registers Settings System

Training

▼ Search:	▼ Advanced search:	▼ Order update:	▼ Reports:	▼ Additional functions:	▼ Functions:
OrderId <input type="text"/> Order Number <input type="text"/> Status <input type="text"/> < All > <input type="button" value="Search"/> <input type="button" value="Clear"/>	Columns <input type="text"/> < Plock > Selection <input type="text"/> < All > ArticleNumber <input type="text"/> <input type="checkbox"/> All Goods Owners	Comment <input type="text"/> <input type="button" value="Update"/> Status <input type="text"/> Error <input type="button" value="Upd."/> Freight Contract <input type="text"/> < None > <input type="button" value="Upd."/> <input type="checkbox"/> Show all update fields	<input type="button" value="Delivery note"/> <input type="button" value="Picking list"/> <input type="text"/>	<input type="button" value="Charge"/> <input type="button" value="Remove"/> <input type="button" value="Return"/> <input type="button" value="Pallet"/> <input type="button" value="Copy"/> <input type="button" value="Back Order"/> <input type="button" value="Out"/> <input type="button" value="ReRun"/>	<input type="button" value="Allocate"/> <input type="button" value="Pick"/> <input type="button" value="Send"/> <input type="button" value="Collected"/>

46 Max 50 Export To Excel

Status	Pickable	Order id	Goods Owner	Order no	Delivery Date	PostNo	City	Country	Comment	Transporter	Customer	Ordered	Alloc.	Picked	Debit	Weight	Pallet Weight	
Open	Ok	14633	Training		13/05/2016	88564	Big City	Sweden		Snabbtransportören	Anna Andersson	2	0	0	0	0	0	
Open	Not ok	3964	Training		22/11/2010	12345	ASTAD				ABC	14	0	0	0	0	0	
Open		3960	Training		22/11/2010	20000	Vedseslöv	Sweden		Snabbtransportören	44:ans förskola	0	0	0	0	0	0	
Open		3946	Training		12/11/2010	36030	Lammhult	Sweden		Snabbtransportören	bikupans fritidshem	0	0	0	0	0	0	
Open		3942	Training		12/11/2010	36030	Lammhult	Sweden		Snabbtransportören	bikupans fritidshem	0	0	0	0	0	0	
Open		3861	Training	1	25/10/2010	12345	ASTAD				ABC	0	0	0	0	0	0	
Open		3860	Training	1	25/10/2010	12345	ASTAD				ABC	0	0	0	0	0	0	
Picking	Ok	14629	Training	555	12/12/2015	98765	Ingenstans	Sweden	Christian	Snabbtransportören	KF	125	0	0	0	0	0	

Search:

Orderid

Order Number

Status

Search

Clear

Advanced search:

Columns

Selection

ArticleNumber

All Goods Owners

Order update:

Comment

Status

Freight Contract

Show all update fields

Reports:

Delivery note

Picking list

Additional functions:

Charge

Return

Copy

Out

Remove

Pallet

Back Order

ReRun

Functions:

Allocate

Pick

Send

Collected

Selected orders: 1

Status	Pickable	Order_id	Goods Owner	Order_no	Delivery Date	PostNo	City	Country	Comment	Transporter	Customer	Ordered	Alloc.	Picked	Debit	Weight	Pallet Weight
Open	Not ok	3964	Training		22/11/2010	12345	ASTAD				ABC	14	0	0	0	0	0
Open		3960	Training		22/11/2010	20000	Vedeslov	Sweden		Snabbtransportören	44:ans förskola	0	0	0	0	0	0
Open		3946	Training		12/11/2010	36030	Lammhult	Sweden		Snabbtransportören	bikupans fritidshem	0	0	0	0	0	0
Open		3942	Training		12/11/2010	36030	Lammhult	Sweden		Snabbtransportören	bikupans fritidshem	0	0	0	0	0	0
Open		3861	Training	1	25/10/2010	12345	ASTAD				ABC	0	0	0	0	0	0
Open		3860	Training	1	25/10/2010	12345	ASTAD				ABC	0	0	0	0	0	0
Picking	Ok	14633	Training		13/05/2016	88564	Big City	Sweden		Snabbtransportören	Anna Andersson	2	0	0	0	0	0

Show load carrier

Show the order's goods

Order pallets

Order lines

Export to Excel

Pick orderrows

Row No.	Article	Line Comment	Article no	In Stock	Booked	Picked	Count
	Circuit board X7		1856	10	2	0	2
				10	2	0	2

New order row

Customer info

Charges

Customer

Customer_No

Address

Country

Transporter

Edit

Show order logs

Pallet items

Shipments

Goods items on order

Export to Excel

Article	Article no	Serial no	Received Date	Location	By	Picked	Comment	ILaser	Scanned	Returned	Count
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Files

To pick the order, check the checkbox on the order(s) you want to pick and then press the "Pick" button.

By clicking on the expand symbol (the small arrow) you can view details of the order, such as order lines, and goods that have been allocated/picked to the order.

More information: When you press the pick button, goods items are allocated to the order. For example, if you have goods from two batches in the warehouse, it is now decided from which batch the goods should be picked. The picking algorithm can be modified to suit your needs, e.g. FIFO, FEFO or prioritizing full pallets or specific stock locations. Contact Ongoing to set a picking algorithm.

If you want to manually select what items are allocated to the order, press "Out" instead of "Pick". You will be redirected to another page, where you can select specific goods items to allocate.

The screenshot displays the 'Standard Order Flow' interface. At the top, there are several tabs: Search, Advanced search, Order update, Reports, Additional functions, and Functions. The 'Search' tab is active, showing fields for OrderId (14633), Order Number, Status, and a Search button. The 'Advanced search' tab shows columns for Columns, Selection, and ArticleNumber. The 'Order update' tab shows a Comment field and an Update button. The 'Reports' tab shows links for Delivery note and Picking list. The 'Additional functions' tab shows buttons for Charge, Remove, Return, Pallet, Copy, Back Order, Out, and ReRun. The 'Functions' tab shows buttons for Allocate, Pick, Send, and Collected. Below these tabs is a table with columns: Status, Pickable, Order_id, Goods Owner, Order no, Delivery Date, PositNo, City, Country, Comment, Transporter, Customer, Ordered, Alloc, Picked, Debit, Weight, and Pallet Weight. The table shows one row with the status 'Printed'. Below the table, there are sections for Order pallets, Order lines, Customer info, Charges, Pallet items, Shipments, Goods items on order, and Files. The 'Order lines' section shows a table with columns: Row No, Article, Line Comment, Article no, In Stock, Booked, Picked, and Count. The 'Goods items on order' section shows a table with columns: Article, Article no, Serial no, Received Date, Location, By, Picked, Comment, Layer, Scanned, Returned, and Count. The 'Status' has been changed to 'Printed' or 'Picked' (depending on system settings).

Normally, a picking list is automatically generated when pressing "Pick". If you want to generate the picking list again, or any other document, click on the requested document in the list.

There are two lists of goods in the order details; "order lines" and "goods items on order". In "Order lines" you see what articles have been ordered. If you want to edit or remove the ordered articles, you click on change or delete. In "Goods items on order" you can see what goods items that have been allocated to the order, and if it has been picked or not. If you want to change what you have picked on the order, you edit or remove lines in this list.

After "Allocate" (if used in your system) or "Pick" has been pressed, you will see the goods items in this list. Before you have allocated/picked any goods this list will be empty.

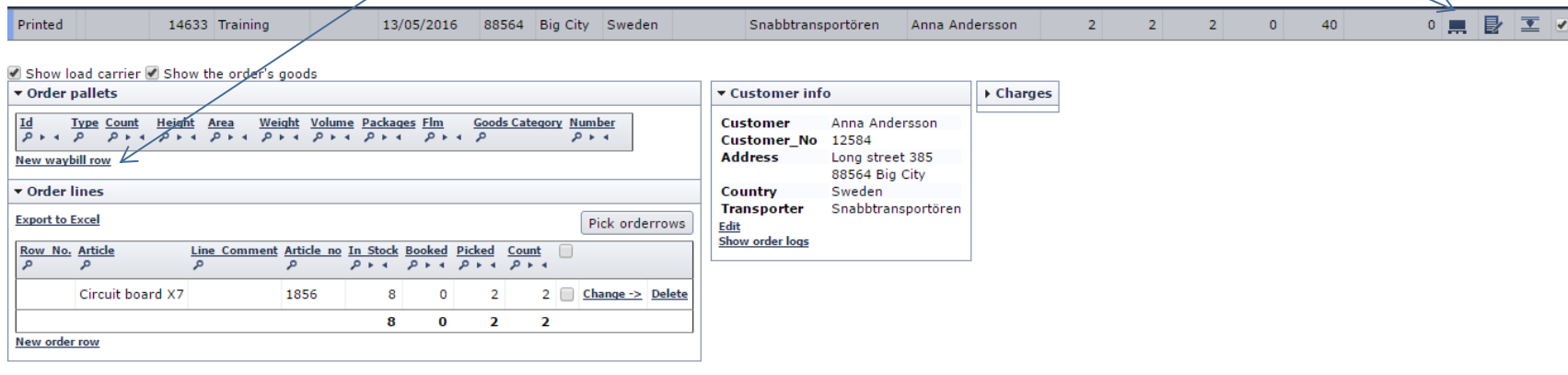
In the checkboxes you can see if the goods have already been picked, scanned or returned. If you can not see the checkboxes, contact Ongoing to unhide those.

More information: All documents generated in the system can be modified to suit your needs, e.g. adding more information, a logo or changing the design. If you want to modify a report, contact Ongoing. The easiest way is to send us a template of how you want to report to look like.

Add waybill rows

If you want to document how the goods have been packed, you can add one or many waybill rows.

You can add rows by either clicking on the pallet symbol to the right in the list, or clicking "new waybill row" under "Order pallets" in the expanded order view.



Printed 14633 Training 13/05/2016 88564 Big City Sweden Snabbtransportören Anna Andersson 2 2 2 0 40 0

☒ Show load carrier ☒ Show the order's goods

▼ Order pallets

<u>Id</u>	<u>Type</u>	<u>Count</u>	<u>Height</u>	<u>Area</u>	<u>Weight</u>	<u>Volume</u>	<u>Packages</u>	<u>Fm</u>	<u>Goods Category</u>	<u>Number</u>
New waybill row										

▼ Order lines

[Export to Excel](#) [Pick orderrows](#)

<u>Row No.</u>	<u>Article</u>	<u>Line Comment</u>	<u>Article no</u>	<u>In Stock</u>	<u>Booked</u>	<u>Picked</u>	<u>Count</u>	<input type="checkbox"/>
	Circuit board X7		1856	8	0	2	2	<input type="checkbox"/>
				8	0	2	2	

[Change ->](#) [Delete](#)

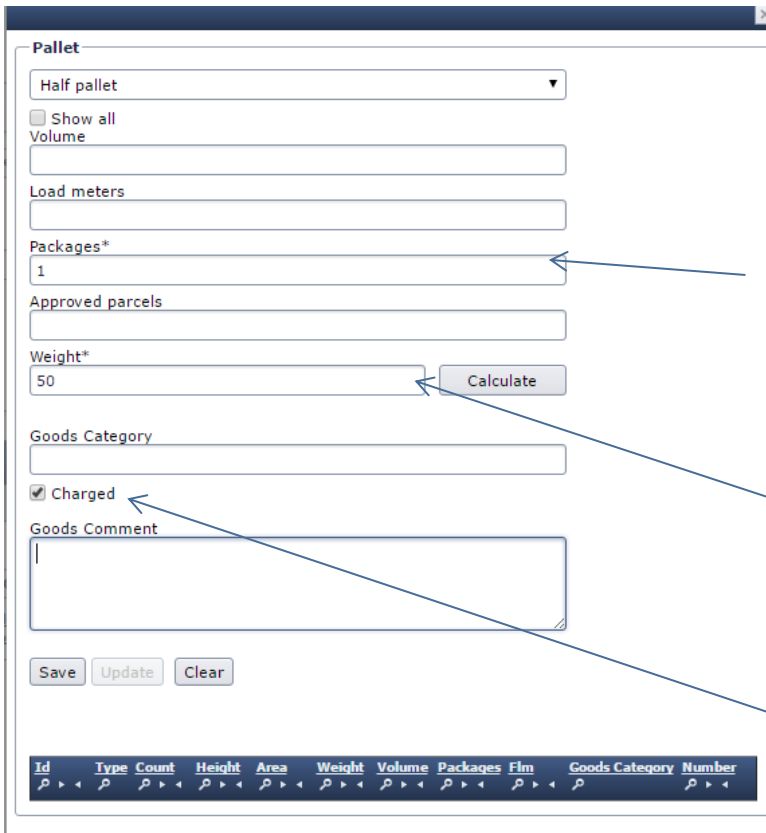
[New order row](#)

▼ Customer info

Customer Anna Andersson
Customer_No 12584
Address Long street 385
 88564 Big City
Country Sweden
Transporter Snabbtransportören
[Edit](#)
[Show order logs](#)

► Charges

More information: If you need to specify which goods that are placed on which pallet you use "Pallet Item" in the expanded order view instead. After creating a pallet there, you can press "Content" to place picked goods from the order on that pallet.



Pallet

Half pallet ▼

☐ Show all Volume

Load meters

Packages* 1

Approved parcels

Weight* 50

Goods Category

☒ Charged

Goods Comment

<u>Id</u>	<u>Type</u>	<u>Count</u>	<u>Height</u>	<u>Area</u>	<u>Weight</u>	<u>Volume</u>	<u>Packages</u>	<u>Flm</u>	<u>Goods Category</u>	<u>Number</u>
▶ ◀	▶ ◀	▶ ◀	▶ ◀	▶ ◀	▶ ◀	▶ ◀	▶ ◀	▶ ◀	▶	▶ ◀

When you have pressed the pallet symbol or the "new waybill row" a pop up window is shown. Fill in the information you want to save and press "Save".

"Packages" refers to the amount of the package type you have selected, e.g. If you select pallets, and type in 4 packages, you have 4 pallets.

In this example we have selected 1 half pallet for our 2 boxes of circuits boards. The weight has been set to 50 kg, since each box weight 20 kg and a half pallet 10 kg. If you have set article weights in the system, you can calculate the weight by pressing "Calculate."

We also have checked the "Charge" box, to state that we want to charge for this pallet. You have to create a price setting for pallets for the charges to be placed on the invoice. More on this in the economy section.

More information: If you want some values to be set by default, either as a constant or calculated from the system, contact Ongoing

Printed	14633	Training	13/05/2016	88564	Big City	Sweden
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☒ Show load carrier
 ☒ Show the order's goods

▼ Order pallets

<u>Id</u>	<u>Type</u>	<u>Count</u>	<u>Height</u>	<u>Area</u>	<u>Weight</u>	<u>Volume</u>	<u>Packages</u>	<u>Fim</u>	<u>Goods Category</u>	<u>Number</u>	
1865	Half pallet	1	0	0.5	50	0	1	0		0	Edit Delete

[New waybill row](#)

▼ Order lines

[Export to Excel](#)
[Pick orderrows](#)

<u>Row No.</u>	<u>Article</u>	<u>Line Comment</u>	<u>Article no</u>	<u>In Stock</u>	<u>Booked</u>	<u>Picked</u>	<u>Count</u>	
	Circuit board X7		1856	8	0	2	2	<input type="checkbox"/> Change -> Delete
				8	0	2	2	

[New order row](#)

Once you have created the waybill row, it is shown in the system under "Order pallets"

Send an order

Order / Order list

Order Warehouse Economy Goods Flow Statistics Misc Registers Settings System Training

▼ Search: OrderId 14633 Order Number Status < All > Search Clear

▼ Advanced search: Columns < Plock > Selection < All > ArticleNumber All Goods Owners

▼ Order update: Comment Update Status Error Upd. Freight Contract < None > Upd. Show all update fields

▼ Reports: Delivery note Picking list

▼ Additional functions: Charge Return Copy Out Remove Pallet Back Order ReRun

▼ Functions: Allocate Pick Send Collected Selected orders: 1

Status	Pickable	Order id	Goods Owner	Order no	Delivery Date	PostNo	City	Country	Comment	Transporter	Customer	Ordered	Alloc	Picked	Debit	Weight	Pallet Weight	
Printed		14633	Training		13/05/2016	88564	Big City	Sweden		Snabbtransportören	Anna Andersson	2	2	2	0	40	50	<input checked="" type="checkbox"/>
												2	2	2	0	40	50	

When you have picked an order, and added waybill rows if required you can complete the order by marking it as sent or collected.

To do this you check the checkbox to the right and press "send" or "collected".

If you are using a transport administration system, such as Unifaun, and have set up an integration to that system the order can be send to the TA system when pressing "Send". It is also required that you have selected a transporter on the order for the integration to work.

(please note, if you are using a demo version of the system the system automatically sends the order to the transport administration system Unifaun. If you get an error message when pressing send, either set "Snabbtransportören" as transporter on the order or use collect-button instead)

The order have now changed status to "Sent" or "Collected" and is completed. We have now gone through the whole order flow, from inbound to outbound delivery, including adding articles and customers to the system. Ongoing can be used in many different ways, from a simple manual order flow as shown here to an advanced flow with scanners and several connected systems. We advice you to start of as simple as possible, with one flow for one goods owner, to get to know the system and its abilities, and move forward as you learn.

▼ Search:

OrderId

14633

Order Number

Status

< All >

Search

Clear

▼ Advanced search:

Columns

< Plock >

Selection

< All >

ArticleNumber

☐ All Goods Owners

▼ Order update:

Comment

Update

Status

Error

Upd.

Freight Contract

< None >

Upd.

☐ Show all update fields

▼ Reports:

Delivery note

Picking list

▼ Additional functions:

Charge

Remove

Return

Pallet

Copy

Back Order

Out

ReRun

▼ Functions:

Allocate

Pick

Send

Collected

Selected orders: 1

1

Max 50

Export To Excel

Status	Pickable	Order_id	Goods Owner	Order_no	Delivery Date	PostNo	City	Country	Comment	Transporter	Customer	Ordered	Alloc.	Picked	Debit	Weight	Pallet Weight
Sent		14633	Training		13/05/2016	88564	Big City	Sweden		Snabbtransportören	Anna Andersson	2	2	2	0	40	50

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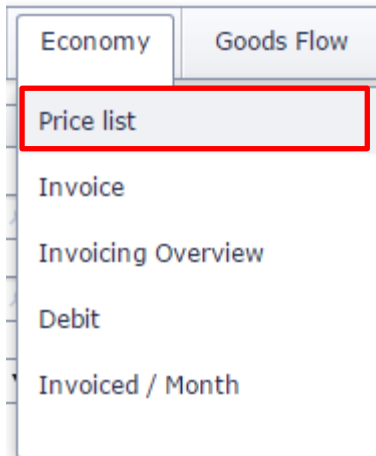
Economy

Ongoing has a economy module that enables you to create invoice specifications for your charges for each goods owner. To do this you first have to create a price list specifying the prices for your services. Secondly you have to create and populate an invoice specification. The prices settings can be based on statistics from the system, such as number of process orders or the amount of day an article has been stored. It can also be fixed values, such as a fix rent per month or manually added e.g. hours spend on additional services.

We will go through

- [Setting up the price list](#)
- [Creating an invoice specification](#)
- [Populate the invoice \(charging\)](#)

Setting up a price list



First, we have to create a price list for each goods owner.

In this example we are creating a price setting for rent per stock location per type of article, based on number of days in stock.

State a name, unit and price.

If you are using a business administration system connected to Ongoing, set the corresponding account, otherwise, set an arbitrary number, e.g. 1.

Title*
Rent for stock keeping

Article Code

Unit
Day

a Price*
20

Account*
1

Profit Center
< None >

☐ Required

Article Info		With	Without
Article Group	5	231	
Article category	0	236	
Weight	21	215	
Volume	20	216	
Length	3	233	
Width	3	233	
Height	3	233	
Quantity per pallet	6	230	
Quantity per carton	1	235	

☒ From Statistics

Used warehouse locations

Warehouse filters

Stock Location Type
< All >

Zone
< All >

Article Filters

Article Group
< All >

Article category
< All >

Article
< All >

Goods Category
< All >

Article class
< All >

Misc filters

Goods status
< All >

Item Class
< All >

Statistic Config

Free days

Out date
Delivery date

Group by
Article

Summering
< None >

Filter
< None >

[New](#) [Update](#)

Price Calculation Type

☒ None ☐ Formula ☐ Price Matrix

☒ Test

From
01/05/2016

To
31/05/2016

Test formula & stat.
[Test](#)

[Create](#) [Update](#) [Delete](#) [Clear](#)

We mark the box "From statistics" since we want the system to calculate how many days of stock keeping we want to charge for.

In the drop down list we select "use warehouse locations" under the heading "Storage". This means, we do not care about the amount of articles, only the number of used locations.

In "Statistic Config" we have selected delivery date as "Out date". This means that the goods is considered to be in stock until it has been send/collected, regardless of when it was picked.

We select to group by article. Grouping by article will charge for every different type of article. If you only wish to charge per stock location, regardless of how many types of articles that are stored there, you leave this field empty.

To try if the price setting works as planned, you can use the "test" button, see next page.

Press "create" to save the price setting to the price list.

☒ Test

From To Test formula & stat.

Count: 515
Price: 10300

Order_id	Inorder ID	Pallet item ID	ArticleDefId	Article_no	Count	CalculatedUnitPrice	Price	Action Date
			3549	101211	31	20	620	
			3556	2001	31	20	620	
			3553	1001	31	20	620	
			3552	1004	31	20	620	
			3554	1003	31	20	620	
			3551	1002	31	20	620	
			3558	22	31	20	620	
			1212	9111	31	20	620	
			927	789	31	20	620	
			3567	456789	31	20	620	
			1190	10001	62	20	1240	
			3574	898998	31	20	620	
			1121	KR-200-152652	31	20	620	
			1151	3097	31	20	620	
			1176	3123	31	20	620	
			3781	1856	19	20	380	

To test any price setting in the price list, select it in the list by pressing "select" to the right. In the test-box select the period of time you want to test for and press "test".

In our example we can now see that we would charge 380 SEK for our Circuit board X7. This is since all of them are placed in A1 for 19 days, and the price is 20 SEK per stock location, article type and day.

The goods is counted as in stock the whole day the goods were picked. We picked the goods on the 13th of May, i.e. The goods was in stock for 19 days. The same holds for inbound delivery.

You can create price list items for in- and outbound delivery in a corresponding way. Try a few ones your self, to get an idea of how it works.

If you want to create a fix monthly fee you check the "required" checkbox instead and not the "from statistics". The price will then be added once per invoice.

We will now show an example of how to make an price setting for additional services that you will add manually throughout the invoice period, e.g. Repacking of goods.

Title* Additional services Article Code <input type="text"/> Unit Hour a Price* 30 Account* 3040 Profit Center < None > <input type="checkbox"/> Required	Article Info <table border="1"> <thead> <tr> <th></th> <th>With</th> <th>Without</th> </tr> </thead> <tbody> <tr> <td>Article Group</td> <td>5</td> <td>231</td> </tr> <tr> <td>Article category</td> <td>0</td> <td>236</td> </tr> <tr> <td>Weight</td> <td>21</td> <td>215</td> </tr> <tr> <td>Volume</td> <td>20</td> <td>216</td> </tr> <tr> <td>Length</td> <td>3</td> <td>233</td> </tr> <tr> <td>Width</td> <td>3</td> <td>233</td> </tr> <tr> <td>Height</td> <td>3</td> <td>233</td> </tr> <tr> <td>Quantity per pallet</td> <td>6</td> <td>230</td> </tr> <tr> <td>Quantity per carton</td> <td>1</td> <td>235</td> </tr> </tbody> </table>		With	Without	Article Group	5	231	Article category	0	236	Weight	21	215	Volume	20	216	Length	3	233	Width	3	233	Height	3	233	Quantity per pallet	6	230	Quantity per carton	1	235
	With	Without																													
Article Group	5	231																													
Article category	0	236																													
Weight	21	215																													
Volume	20	216																													
Length	3	233																													
Width	3	233																													
Height	3	233																													
Quantity per pallet	6	230																													
Quantity per carton	1	235																													

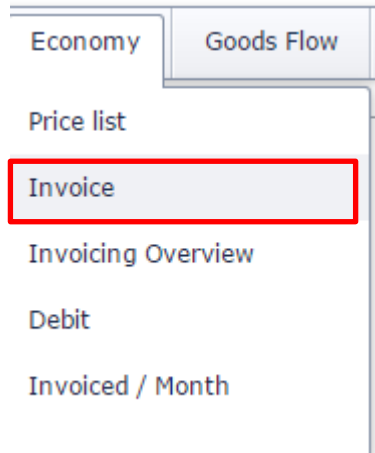
☐ **From Statistics**
 < Select >

Price Calculation Type
☒ None ☐ Formula ☐ Price Matrix

☒ **Test**
 From 2016-04-16 To 2016-05-16 Test formula & stat.

Create a price setting as shown in the picture. Later in this guide we will show how to charge for an additional service.

Create an invoice specification



Before you can do any charges, you have to create an invoice specification. Generally, invoice specifications are called invoice in the system, even though they are meant to be a specification attached to an invoice from your book keeping system.

In the Ongoing the term "active invoice" is used for the invoice to which all charges are tied. If you want to add charges during the month of May for the May invoice, you have to create a new invoice in the end of April and select this as the active invoice. Only one invoice at a time can be active per goods owner.

Give the invoice a name, e.g. the invoice month.

State the time period for the invoice. By clicking or "this month" or "this week" dates for that time period is automatically added.

Check the "activate" check box for the invoice to be set as the active invoice. As stated in previous page, the active invoice is the invoice that we are currently adding charges for. If for example, we charge for an additional service from the order list, this charge will be visible on the active invoice.

Title*
May

Invoice Number
201605

Invoice Text

Invoice Period*
2016-05-01 2016-05-31

<< This Month >>
<< This Week >>

Invoice Date*
01/06/2016

Article Info		
	With	Without
Article Group	5	231
Article category	0	236
Weight	21	215
Volume	20	216
Length	3	233
Width	3	233
Height	3	233
Quantity per pallet	6	230
Quantity per carton	1	235

☒ Activate

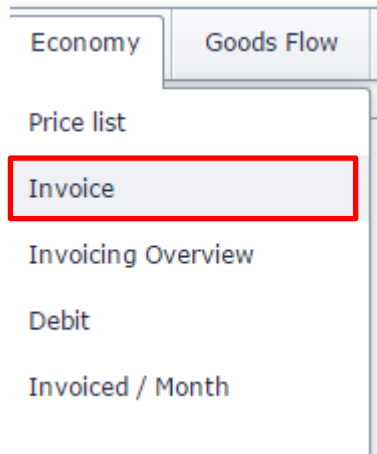
Create Update Delete Calculate Rows Clear

Press "Create" to create the invoice.

If the invoice is created in the end of the month, and you want to add all statistical charges for the invoice period, you can use the "calculate" button. Be aware that statistics are added each time you press "calculate". It should only be used once!

In this guide, we will add the statistics in another way, so use the "Create" button to follow the guide.

Create an invoice specification - add charges to the invoice



Title*
May

Invoice Number
201605

Invoice Text

Invoice Period*
2016-05-01 2016-05-31

<< This Month >>
<< This Week >>

Invoice Date*
2016-06-01

Article Info

	With	Without
Article Group	5	231
Article category	0	236
Weight	21	215
Volume	20	216
Length	3	233
Width	3	233
Height	3	233
Quantity per pallet	6	230
Quantity per carton	1	235

☒ Activate

Create Update Delete Calculate Rows Clear

Invoice Id Invoice number Invoice name Search Clear

Invoice specification

ID	Invoice no	Invoice	Invoice Date	Active	Total	From	To	
116	201605	May	01/06/2016	<input checked="" type="checkbox"/>	0	01/05/2016	31/05/2016	Select
109	112233	November 2010	22/11/2010	<input type="checkbox"/>	35358.5	01/11/2010	30/11/2010	Select
108		test	22/11/2010	<input type="checkbox"/>	510.40	01/11/2010	30/11/2010	Select

We can now see our invoice "may" in the list of invoices. Press "select" on the invoice row and thereafter on "Rows".

To add all price settings listed under charge that is collected from statistics, you can press "calculate". If you want to remove them again, press "Remove stat."

If you want to add only one or a few price setting, select it/them in the "charge" box and press "Calc. checked". Mark the price setting you created for rent, here called "Rent for stock keeping" and press "Calc checked"

In charges, you find all price settings created for this goods owner.

Invoice info

Invoice Title May
Goods Owner Training
Invoice Number 201605
Invoice Total 0.00
2016-05-01 - 2016-05-31
☐ Exported

Remove all
Remove stat.
Calculate
Export

Invoice specification

Export To Excel

Title	Count	Price	Comment	Action Date	Group	Order no	Order no	Order id
P	P	P	P	P	P	P	P	P

Charge

Article
Action Date
Count *
1
a Price
Price*
Profit Center
< None >
Reference
Comment

Create Update Delete Clear

Charge

☐ Show only posts ☐ not on invoice

Title	Statistics	Formula	Statistics info	
P	☑	☐	P	☐
Inbound	☑	☐	Received articles	Add ☐
Outbound	☑	☐	Delivered number	Add ☐
Outbound pieces	☑	☐	Number of items delivered in excess of whole pallets	Add ☐
Packing handling	☐	☐		Add ☐
Rent for stock keeping	☑	☐	Used warehouse locatons	Add ☐
Services	☐	☐		Add ☐
Storage fee	☐	☐		Add ☐
test	☐	☐	Number of delivered pallets	Add ☐
Warehouse cost	☑	☐	Number of articles	Add ☐

2016-05-01 - 2016-05-31 Calc. checked

Since we haven't charge anything yet, the invoice is still empty.

Invoice info

Invoice Title May
Goods Owner Training
Invoice Number 201605
Invoice Total 10300.00
2016-05-01 - 2016-05-31
☐ Exported

Remove all

Remove stat.

Calculate

Export

Charge

Article

Rent for stock keeping
Price: 20 / Day

Action Date

Count *

19

a Price

20

Price*

380

Profit Center

< None >

Reference

Comment

Create

Update

Delete

Clear

Charge

☐ Show only posts not on invoice

Rate	Statistics	Formula	Statistics info	
Inbound	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Received articles	Add <input type="checkbox"/>
Outbound	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delivered number	Add <input type="checkbox"/>
Outbound pieces	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Number of items delivered in excess of whole pallets	Add <input type="checkbox"/>
Packing handling	<input type="checkbox"/>	<input type="checkbox"/>		Add <input type="checkbox"/>
Rent for stock keeping	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Used warehouse locations	Add <input checked="" type="checkbox"/>
Services	<input type="checkbox"/>	<input type="checkbox"/>		Add <input type="checkbox"/>
Storage fee	<input type="checkbox"/>	<input type="checkbox"/>		Add <input type="checkbox"/>
test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Number of delivered pallets	Add <input type="checkbox"/>
Warehouse cost	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Number of articles	Add <input type="checkbox"/>

2016-05-01

2016-05-31

Calc. checked

Invoice specification

Export To Excel

Title	Count	Price	Comment	Action Date	Group	Order no	Order no	Order id
p	p	p	p	p	p	p	p	p
Rent for stock keeping	19	380						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	62	1240						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
Rent for stock keeping	31	620						<<
515	10,300							

Since we have grouped the price setting by article, one row per article and stock location is added to the invoice.

Now we will charge for an additional service.

Click on "Add" on "additional services". If you haven't created it, go back to "Economy->Price list" to do so.

Charge

Article
Additional Services
Price: 30 / Hour

Action Date
2016-05-17

Count *
3

a Price
30

Price*
90

Profit Center
< None >

Reference

Comment
relabeling of goods

Create Update Delete Clear

Charge

☐ Show only posts not on invoice

Title	Statistics	Formula	Statistics info	
Additional Services	<input type="checkbox"/>	<input type="checkbox"/>		Add
Inbound	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Received articles	Add
Outbound	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delivered number	Add
Outbound pieces	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Number of items delivered in excess of whole pallets	Add
Packing handling	<input type="checkbox"/>	<input type="checkbox"/>		Add
Rent for stock keeping	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Used warehouse locatons	Add
Services	<input type="checkbox"/>	<input type="checkbox"/>		Add
Storage fee	<input type="checkbox"/>	<input type="checkbox"/>		Add
test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Number of delivered pallets	Add
Warehouse cost	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Number of articles	Add

2016-05-01 - 2016-05-31 Calc. checked

We charge for 3 hours and set 17 of May to be the action date. We have added a comment to state that the charge is for relabeling of goods.

Press Create

We can now find the charge on the invoice.

Title	Count	Price	Comment	Action Date	Group	Order no	Order no	Order id
Additional Services	3	90	relabeling of goods	17/05/2016				
Rent for stock keeping	19	380						

We will now add a charge connected to an order.
Go to the order list, select an order by marking the checkbox to the right in the list and the press "charge."

The screenshot shows the main interface of the Ongoing Warehouse Management System. At the top, there are several tabs: Search, Advanced search, Order updates, Reports, Additional functions, and Functions. The 'Additional functions' tab is selected, and the 'Charge' button is highlighted with a blue arrow. Below the tabs, there is a table with columns for Status, Pickable, Order id, Goods Owner, Order no, Delivery Date, PostNo, City, Country, Comment, Transporter, Customer, Ordered, Alloc., Picked, Debit, Weight, and Pallet Weight. The table contains several rows of data, including orders for Training, ASTAD, and Snabbtransportören. The 'Charge' button is located in the 'Additional functions' section, and a blue arrow points to it from the text above.

The screenshot shows two pop-up windows. The 'Invoice Info' window displays details for an invoice, including the title, goods owner, invoice number, and total. The 'Order info' window displays details for an order, including the order number, transporter, reference, and comment. A blue arrow points from the 'Charge' button in the main interface to the 'Order info' window, indicating that the 'Charge' button opens this pop-up.


Charge by adding an amount of hours to the additional service and press "add" in the pop up.

Go back to the may invoice (go to Economy -> invoice. Select the invoice in the invoice list and then press "Rows")

You can export the invoice to pdf/excel by pressing the pdf/excel icons.

Calculate

Export

  [Invoice specification](#)

You can also print invoices form

Economy->invoice or
Economy-> invoicing
overview.

Reference

Comment

Create Update Delete Clear

[Export To Excel](#)

Title	Count	Price	Comment	Action Date	Group	Order no	Order no	Order id
Additional Services	3	90		17/05/2016	555			14629
Additional Services	3	90	relabeling of goods	17/05/2016				
Rent for stock keeping	19	380						
Rent for stock keeping	31	620						
Rent for stock keeping	31	620						
Rent for stock keeping	31	620						

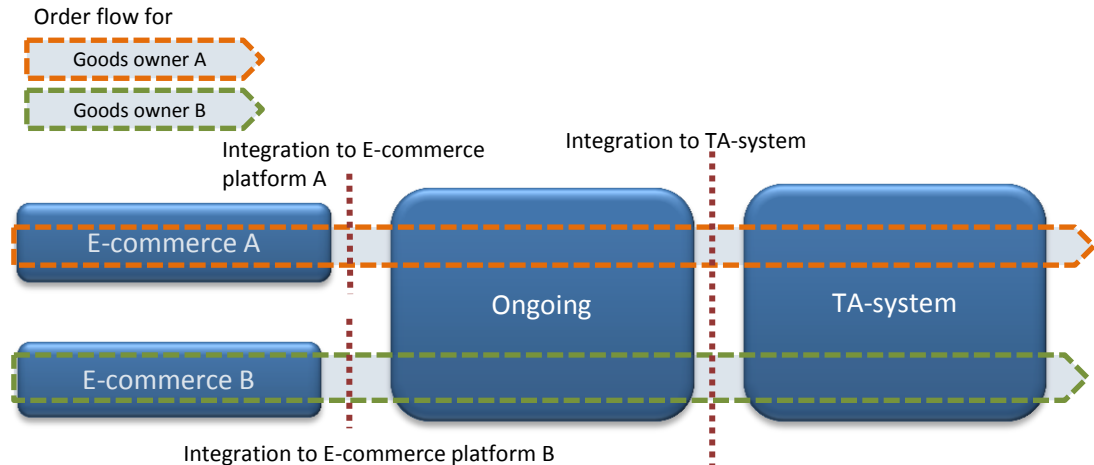
You can see the charges we added in the list.

Integrations

It is possible to integrate Ongoing to other systems e.g. Business administration systems, E-Commerce platforms or transport administration systems (TA-systems). On our [homepage](#) you find a list of the integrations we have so far and some information about them. An integration take from a few of hours to a couple of days to implement. Contact Ongoing for time estimations.

You can also let others do an integration to Ongoing using our API, see next page.

The example below shows an order flow where Ongoing is integrated to two E-commerce platforms and a TA-system



Ongoing SOAP API

If you want someone else to integrate to your Ongoing system they can do so using our standardized SOAP API. This means that you can, with in-house IT resources or any IT consultant, do connections between your different systems and Ongoing.

The API is described in more detail on our developer page <http://developer.ongoingwarehouse.se/Introduction>.

Contact Ongoing if you wish to do an integration to our API. You will be provided with details needed by the developer who is setting up the integration.

Additional guides

In this part you find additional guides that can be useful when you start using Ongoing. You also find more detailed descriptions in our manual (found at the help page in your system)

- [Create customer login](#)
- [Create/Change in the warehouse map](#)
- [Using inorders](#)

Creating a customer login

You can add log in accounts for your customers. From the customer accounts they can place orders and inorders, see their stock levels and add new customers.

A customer login is free of charge and you can create and remove them in your system your self from "Settings->users"

Settings	System	
System registers	Warehouse	Units
Reports	Locations	Goods Units
Users	Aisles	Profit Centers
Countries	Create Aisle	Units
Currencies	Zones	
Order Statuses	Warehouses	
Inorder Statuses	Location Types	Dangerous Goods
Pallet Owners		UN Numbers
Package Types		Classes
Goods Owner Groups		Package Types
User Groups		
	Shipment Registers	
	Goods Category	

User Name

Password

Default Goods Owner

Menu

Language

☐ Is read only
--
☐ Administrator
☐ Stock Worker
☐ Dashboard user

☐ All Goods Owners

☒ E-commerce

☐ Electronics Company

☐ Training

Enter User name and password. We recommend you to use the password generator to generate a strong password.

Select "Customer" or "Customer with Inorder" under "Menu". "Customer with Inorder" is used for customers that advice arriving goods using inorders.

It is important that you only mark the goods owner which the customer should be able to view in the goods owner box above.

Press "Create"

More information: In the menu "Settings" → "Users" you can view information about all users, change passwords or delete user accounts.

If you log on to the customer account, you find a limited menu from which the customer can place orders or view goods flows, e.g. goods in stock.

Order > Order List

Order Goods Flow Statistics Systems

▼ Search:

OrderId

Order Number

Status

< All >

Search

Clear

▼ Advanced search:

Columns

< Plock >

Selection

< All >

ArticleNumber

☐ All Goods Owners

▼ Reports:

[Delivery note](#)

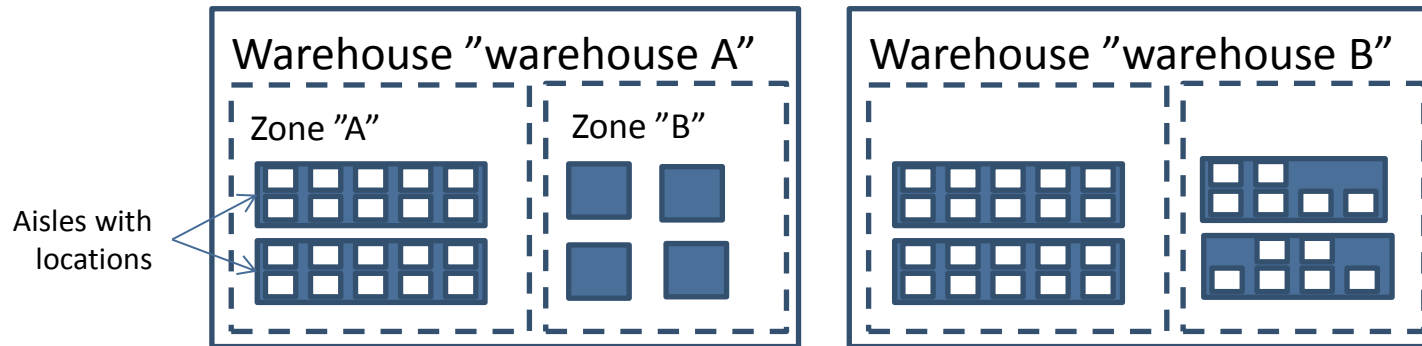
[Picking list](#)

3 Max: 50 [Export To Excel](#)

Status	Pickable	Order_id	Goods Owner	Order_no	Delivery Date	PostNo	City	Country	Comment	Transporter	Customer	Ordered	Alloc.	Picked	Debit	Weight	Pallet Weight	
Printed		14622	E-commerce	6	01/10/2014	41282	Göteborg	Sweden		Schenker Comfort	Kalle Karlsson	5	5	5	0	5.5	0	
Printed		14621	E-commerce	2	01/10/2014	41282	Göteborg	Sweden		Schenker Comfort	Kalle Karlsson	5	5	5	0	5.5	0	
Sent		14620	E-commerce	1	14/01/2014	41282	Göteborg	Sweden		Schenker Comfort	Kalle Karlsson	5	5	5	0	5.5	30.5	
												15	15	15	0	16.5	30.5	

Create/update the warehouse map

You can create one or more warehouses in Ongoing. A warehouse contains at least one zone in which aisles with warehouse locations can be created. To create a warehouse location a warehouse with a zone and an aisle must exist.



In this guide we will show you how to

- Create a warehouse with a zone
- Create an aisle with locations
- Add/Remove locations to an existing aisle
- Changing an aisle
- Change location

Create a warehouse with a zone

Settings	System
System registers	Warehouse
Reports	Locations
Users	Aisles
Countries	Create Aisle
Currencies	Zones
Order Statuses	Warehouses
Inorder Statuses	Location Types
Pallet Owners	
Package Types	
Goods Owner Groups	
User Groups	
	Shipment Registers
	Goods Category

Create new warehouse

Name
Warehouse A

Code
A

X

Y

☒ Address

Name*
Warehouse A

Address *
Long Street 998

ZipCode* City*
12345 Big City

Country
Sweden ▼

Delivery Instruction

Telephone
0123456789 ☐ Telephone Notification

Mobile Phone ☐ Notify

Email ☐ Notify

Name the warehouse and set a warehouse code, if used. The X and Y position is used to position warehouses in relations to each others. This is normally not used.

If you check the "Address" check box you can enter contact information to the warehouse. This can be used on e.g. Way bills or other reports.

Press "Create"

Settings	System	
System registers		Warehouse
Reports		Locations
Users		Aisles
Countries		Create Aisle
Currencies		Zones
Order Statuses		Warehouses
Inorder Statuses		Location Types
Pallet Owners		
Package Types		
Goods Owner Groups		
User Groups		
		Shipment Registers
		Goods Category

We will now create a zone i our warehouse

Create new zone

Warehouse
Warehouse A ▼

Name
Cold Zone

X Y

Select the warehouse in which the zone is located and name the zone. X and Y refer to the X and Y coordinates in relations to other zones in that building. This is normally not used, but can be used to set e.g. picking priorities.

Create a new aisle

It is possible to create aisles and warehouse locations in two steps. However we recommend you to use the menu "create aisle" under "setting" where both an aisle and its locations are created, as shown here.

Settings	System
System registers	Warehouse
Reports	Locations
Users	Aisles
Countries	Create Aisle
Currencies	Zones
Order Statuses	Warehouses
Inorder Statuses	Location Types
Pallet Owners	
Package Types	
Goods Owner Groups	

Create a new aisle

Select the zone we just created.
We will now create an aisle called "Cold-A" with locations of type "Shelf". The aisle will be 8 location long (X) and 4 locations in height (Y).

Normally, the aisle name and the aisle prefix is the same. In this example, we give the aisle the prefix CA, since Cold-A will result in long location names.

Each location must be unique in the entire system. If you want to use e.g. CA-1-A in both you warehouses, say warehouse A and B, you can use a prefix for each warehouse; A-CA-1-A and B-CA-1-A respectively.

Zone
Colde Zone ▼

Stock Location Type
Shelf ▼

Aisle*
Cold-A

☐ Use Sections

X

☐ Only odd X
☐ Only even X
☒ Numerical X

Number of X-locations
8 ☐ From/To X

Y

☐ Numerical Y
☐ Start with 0

Number of Y-locations
4 ☐ From/To Y

Misc

☐ Length/Width/Height (m)

Naming strucure

Aisle prefix
CA- X ▼ - Y ▼

Cold-A

Edit

CA-1-D	CA-2-D	CA-3-D	CA-4-D	CA-5-D	CA-6-D	CA-7-D	CA-8-D
Remove	Remove	Remove	Remove	Remove	Remove	Remove	Remove
CA-1-C	CA-2-C	CA-3-C	CA-4-C	CA-5-C	CA-6-C	CA-7-C	CA-8-C
Remove	Remove	Remove	Remove	Remove	Remove	Remove	Remove
CA-1-B	CA-2-B	CA-3-B	CA-4-B	CA-5-B	CA-6-B	CA-7-B	CA-8-B
Remove	Remove	Remove	Remove	Remove	Remove	Remove	Remove
CA-1-A	CA-2-A	CA-3-A	CA-4-A	CA-5-A	CA-6-A	CA-7-A	CA-8-A
Remove	Remove	Remove	Remove	Remove	Remove	Remove	Remove

Create

We want to use letters instead of numbers to state the vertical position of the location. To do this, we uncheck the "Numerical Y" check box.

In the preview the new aisle is shown. We will now edit the aisle before we save it, see next page.

Cold-AEdit

CA-1-D Remove	CA-2-D Remove	CA-3-D Add	CA-4-D Add	CA-5-D Remove	CA-6-D Remove	CA-7-D Remove	CA-8-D Remove
CA-1-C Remove	CA-2-C Remove	CA-3-C Add	CA-4-C Add	CA-5-C Remove	CA-6-C Remove	CA-7-C Remove	CA-8-C Remove
CA-1-B Remove	CA-2-B Remove	CA-3-B Remove	CA-4-B Remove	CA-5-B Remove	CA-6-B Remove	CA-7-B Remove	CA-8-B Remove
CA-1-A Remove	CA-2-A Remove	CA-3-A Remove	CA-4-A Remove	CA-5-A Remove	CA-6-A Remove	CA-7-A Remove	CA-8-A Remove

Create

Click on locations to remove them, e.g. if there are pillars blocking parts of the aisle.

Press "Create" to save the aisle with the stock locations.

Change an aisle

Update aisle

☐ Admin

Zone
Colde Zone ▼

Name*
Cold-A

X
1

Y
1

Go to "Settings" -> "Aisle"

Select the aisle you want to modify. If you want to rename the aisle, click on "select" and change in the box above. If you want to change the locations, press "Edit". We will now change the locations, so press "Edit"

Export To Excel

☒ Max 100

Aisle X Y Search Clear

AisleId	Aisle	Zone	Warehouse	Locations	Used	Locations	Free	Locations	Count	X	Y	
34623	Cold-A	Colde Zone	Warehouse A	28	0	28				1	1	Edit <input type="checkbox"/> Select
573	A-Gång	Gbg	Hus A	2	2	0	504			1	1	Edit <input type="checkbox"/> Select
29067	HA	Gbg	Hus A	350	0	350				1	1	Edit <input type="checkbox"/> Select

Add/remove locations in an aisle

Location To Move Goods To

A1

☐ Use Sections

X

☒ All X☐ Only odd X☐ Only even X☒ Numerical X

Number of X-locations

9

☐ From/To X

Y

☐ Numerical Y☐ Start with 0

Number of Y-locations

4

☐ From/To Y

Naming structure

Aisle prefix

CA- X Y

Update

Current aisle

CA-1-D 0	CA-2-D 0			CA-5-D 0	CA-6-D 0	CA-7-D 0	CA-8-D 0
CA-1-C 0	CA-2-C 0			CA-5-C 0	CA-6-C 0	CA-7-C 0	CA-8-C 0
CA-1-B 0	CA-2-B 0	CA-3-B 0	CA-4-B 0	CA-5-B 0	CA-6-B 0	CA-7-B 0	CA-8-B 0
CA-1-A 0	CA-2-A 0	CA-3-A 0	CA-4-A 0	CA-5-A 0	CA-6-A 0	CA-7-A 0	CA-8-A 0

Updated aisle

CA-1-D 0 Remove	CA-2-D 0 Remove	CA-3-D 0 Add	CA-4-D 0 Add	CA-5-D 0 Remove	CA-6-D 0 Remove	CA-7-D 0 Remove	CA-8-D 0 Remove	CA-9-D 0 Remove
CA-1-C 0 Remove	CA-2-C 0 Remove	CA-3-C 0 Add	CA-4-C 0 Add	CA-5-C 0 Remove	CA-6-C 0 Remove	CA-7-C 0 Remove	CA-8-C 0 Remove	CA-9-C 0 Remove
CA-1-B 0 Remove	CA-2-B 0 Remove	CA-3-B 0 Remove	CA-4-B 0 Remove	CA-5-B 0 Remove	CA-6-B 0 Remove	CA-7-B 0 Remove	CA-8-B 0 Remove	CA-9-B 0 Remove
CA-1-A 0 Add	CA-2-A 0 Remove	CA-3-A 0 Remove	CA-4-A 0 Remove	CA-5-A 0 Remove	CA-6-A 0 Remove	CA-7-A 0 Remove	CA-8-A 0 Remove	CA-9-A 0 Remove

ongoing...
warehouse management systems

When changing an aisle, you always have to state a stock location to which the goods should be moved if a stock location with goods placed on it is deleted, even when you do not intend to delete locations

Enter the new amount of locations in X and Y direction. We want to add another set of locations in X-direction, so we have selected 9 as X value and 4 in Y value.

Add the naming as previously. If you change name on a location, the goods will be moved from that location to the location you stated above. If you want to rename your locations, go to "Settings" → "Locations" instead. (see next page)

In the pre view you can see the new aisle. Don't forget to remove the locations we removed last time, by clicking on them. Try to remove an existing location, the location in the old aisle will then be marked in red.

The locations marked in grey will not be generated. The white locations are not effected by the change. Green are new locations and locations marked in red will be removed.

Press "Update" to save

Update stock locations

Go to "Settings" → "Locations" to change e.g. name, type or picking priority on a stock location.

Find the location(s) you want to change. If you only want to change one location you can use the fields above the list by first clicking on "select" in the location list.

Create new location

☐ Admin

Aisle
A

Name*

Stock Location Type
< None >

X* Y*

Picking Priority*

Height Width Depth

Pallet locations

☐ Items locked
☐ Only one item in one location
☐ Default location for only one article

Create Update Clear

Export To Excel

☒ Max 100

Stock Location


Location	Location Type	Picking Priority	Aisle	Zone	Warehouse	Locked	One Article / Location	Single item / location	X	Y	Height	Width	Length	
CA-1-B	Shelf	100	Cold-A	Colde Zone	Warehouse A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	2				<input checked="" type="checkbox"/> Select
CA-1-C	Shelf	100	Cold-A	Colde Zone	Warehouse A	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	3				<input checked="" type="checkbox"/> Select

If you want to change multiple locations, mark them in the list and press "Multiple update". You can filter the list of locations to find the locations you want to change. We have searched for "Cold" in the aisle column.

When you press "multiple update" a pop up window will show, see next page.

Count: 2

Field to update:	Update
Aisle A	<input type="checkbox"/>
Stock Location Type Pallet Racks	<input checked="" type="checkbox"/>
Picking Priority 50	<input checked="" type="checkbox"/>
Pallet locations	<input type="checkbox"/>
Height	<input type="checkbox"/>
Width	<input type="checkbox"/>
Depth	<input type="checkbox"/>
Y	<input type="checkbox"/>
<input type="checkbox"/> Items locked	<input type="checkbox"/>
<input type="checkbox"/> Only one item in one location	<input type="checkbox"/>
<input type="checkbox"/> Default location for only one article	<input type="checkbox"/>

 [Translate](#)

Fill in the new values and mark the row you want to update. Here, we change the stock location type to "Pallet Racks" and setting the picking priority to 50.

Press "Update" to save

More information: Picking priorities can be used for picking algorithms. You can change the picking priorities on locations in the system., e.g. a higher priority on low locations.

Using Inorders

An inorder is a notification of goods that will be delivered to the warehouse. It can be created by you in the system, by a customer through their customer login or imported through excel or an integration to another system. We will now create an inorder and then do an inbound delivery connected to the inorder. Creating inorders is done in the same way in a customer log in as in your normal log in.

Create inorder

Order	Warehouse	Economy	Goods Flow	Statistics	Misc	Register
Outbound	Inbound	Customers				
Create Order	Create Inorder	Customer				
Add To Order	Inorder List					
Order List		Suppliers				
		Suppliers				

As when you create an order, an inorder is created in two steps; first you create the inorder and then you tie goods it.

< New >

☐ Show all fields

Supplier

Name Supplier Number

Supplier 1 ▼

[New](#) [Edit](#)

Order date
2016-05-31

Inbound date
12/06/2016

Inorder number*
X856

Supplier Order Number
S123

Reference

Reference number

☐ The Inorder is a return

Status
Notified ▼

Container

Comment

[Create](#) [Update](#) [Close](#) [Clear](#)

You can, but are not required to, specify which supplier that will deliver the goods. If you want to add a new supplier or update an existing click on the "new" or "change" respectively.

It is mandatory to enter an inorder number, and voluntary to add a supplier's inorder number.

Select the status the inorder should have once created. Most commonly used is "Advice."

Press "Create" to go to the next step in creating an inorder.

Add goods items to the inoder by entering the number to be delivered and press the shopping cart symbol.



100 Max 100 [Export To Excel](#)

- ☒ Show only articles in out of stock
☐ Show only suppliers articles (inorder)

Article no	Article	Factory Code	Article Group	Unit	Booked	Count	Stock days	On Order	Delete
100001	Table			pcs	0	0	0	500	500
100002	Chair			pcs	0	0	0	1000	1000
10002	Tröja Lyle & Scott Stl S, herr				0	0	0		
10003	Tröja Lyle & Scott Stl L, herr				0	0	0		
10004	Tröja Lyle & Scott Stl XL, herr				0	0	0		

Order info

X856

Article no	Article	Received	Advised	
100001	Table	0	500	Edit Delete
100002	Chair	0	1000	Edit Delete
		0	1,500	


[Close](#) [Cancel](#) [Remove](#)

To the right the goods already added on the inorder is shown. When you have added all products press "Close". If you want to edit the inorder later, press "Cancel."

You find the created inorder in the inorder list, see next page.

By pressing the select symbol the inorder will expand to show inorder details.

10 Max 10 [Export To Excel](#)

Status	Inorder ID	Order no	Received Date	Comment	Reference	Last InTime	Advised	Received	Select
Notified	169	X856	12/06/2016				1500	0	

☐ Show parcels ☐ Show goods

[Show inorder logs](#)

▼ Order lines

[Export To Excel](#)

Order no	Article	Article no	Article Group	Advised	Received	Deflection	
X856	Table	100001		500	0	500	Edit Delete <input type="checkbox"/>
X856	Chair	100002		1000	0	1000	Edit Delete <input type="checkbox"/>
				1,500	0	1,500	

Receive goods on an advised inorder

Order	Warehouse	Economy	Goods Flow	Statistics	Misc
Outbound		Inbound		Customers	
Create Order		Create Inorder		Customer	
Add To Order		Inorder List			
Order List				Suppliers	
				Suppliers	

▼ Search:

InOrderId

Reference

Inorder number

Status

< All >

Search

Clear

▼ Advanced search:

Selection

< All >

ArticleNumber

Supplier ArticleNo

Last in time(From)

All Goods Owners

▼ Order update:

Comment

Upd.

Status

Notified

Upd.

Order Type

< None >

Upd.

▼ Reports:

ReceiptNote

▼ Functions:

Receive

Charge

Send

Remove

ReRun

Selected orders: 1

10

Max

10

Export To Excel

Status	Inorder ID	Order no	Received Date	Comment	Reference	Last InTime	Advised	Received	
Notified		169 X856	12/06/2016				1500	0	

☐ Show parcels
 ☐ Show goods
 [Show inorder logs](#)

▼ Order lines

Export To Excel

Order no	Article	Article no	Article Group	Advised	Received	Deflection	
X856	Table	100001		500	0	500	Edit Delete <input type="checkbox"/>
X856	Chair	100002		1000	0	1000	Edit Delete <input type="checkbox"/>
				1,500	0	1,500	

Mark the inorder in the inorder list and press "Receive". You can also go to "Warehouse" → "Receive Goods" and select the inorder in the drop down list.

When this check box is set you can select an inorder in the drop down list.

↓

☒ Inorder
Inorder

☒ Show only not received inorders
Arrival space, 169, X856, ▼

☐ Show list ☒ Show only articles in order **Received**

[New inorder](#) [Edit inorder row](#) [New inorder row](#) [Edit inorder row](#)

Article

Article number Name Article Group Unit Selection

Chair (0/1000) ▼

Chair
100002
Pieces
[New](#) [Edit](#)

Count *
1000 ☐ Show location suggestion

Stock Location*
A1

☐ More fields
Serial Number

Batch

Case no

Inbound date

Item status
< None > ▼

Expiry Date

Comment

[Save](#) [Clear](#)

You can receive one or multiple article at the time like we did when receiving goods without an inorder, see picture to the left. You can also receive multiple articles on the inorder by checking the "Show list" check box, see below.

↓

☒ Inorder
Inorder

☒ Show only not received inorders
Arrival space, 169, X856, ▼

☒ Show list ☒ Show only articles in order **Received**

[New inorder](#) [Edit inorder row](#) [New inorder row](#) [Edit inorder row](#)

Row No.	Article	Article no	Advised	Received	Location	Count
1	Table	100001	500	500	A1	1000 Inl.
2	Chair	100002	1000	1000	A1	500 Inl.

[Receive all](#)

Do the inbound delivery and press "Save" or "Receive all" (depending on if you are using the list or not) and then "Receive" to change the status.

Search:

Status

< All >

Search Clear

Advanced search:

Selection

< All >

ArticleNumber

Supplier ArticleNo

Last in time(From)

All Goods Owners

Order update:

Comment

Upd.

Status

Notified

Upd.

Order Type

< None >

Upd.

Reports:

ReceiptNote

Functions:

Receive

Charge

Send

Remove

ReRun

1 Max 10 Export To Excel

Status	Inorder ID	Order no	Received Date	Comment	Reference	Last InTime	Advised	Received
Received	169	X856	12/06/2016			2016-05-31 09:08	1500	1500

☐ Show parcels
 ☐ Show goods
 [Show inorder logs](#)

Order lines

Export To Excel

Order no	Article	Article no	Article Group	Advised	Received	Deflection
X856	Table	100001		500	500	0
X856	Chair	100002		1000	1000	0
				1,500	1,500	0

You will now find the inorder in the inorder list. When expanding the inorder you can see the advised and received number of items.