juzWMS

WAREHOUSE MANAGEMENT SYSTEM

A License FREE Version of CRiSTAL WMS

USER GUIDE

Version 1.00

Last Updated: 06-Nov-12

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Users that like to provide feedback, please email marcom@cristalsolutions.com.sg
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1. INTRODUCTION

To simplify the start-up of the system, ***juzWMS*** is pre-configured for single warehouse with 200 locations.

Additional locations may be added manually as described below.

For training on the use of the system, please enquire with Singapore Institute of Material Management.

The menu options are order by ascending alphanumeric sequence.

1.1. Login ID

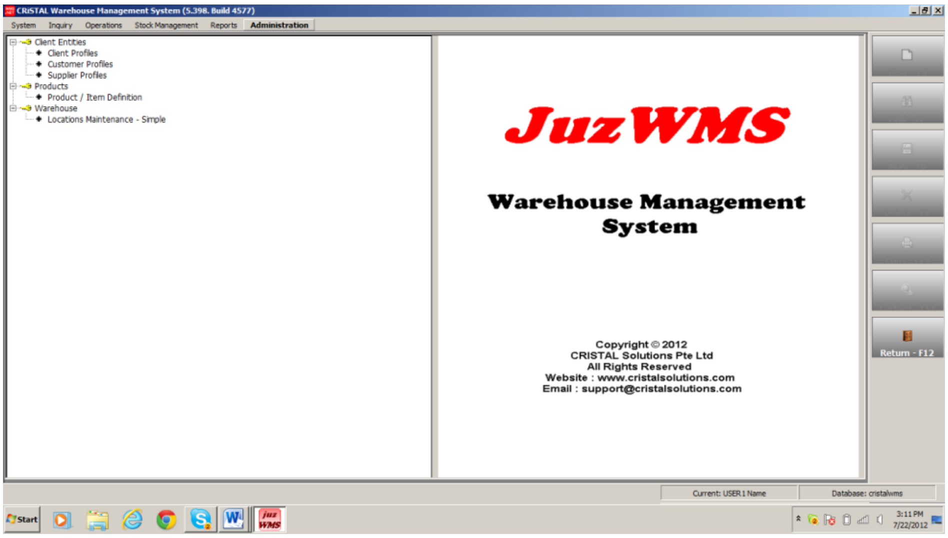
The login user ID and password are:

1. USER1 / USER1
2. MGR1 / MGER1

2. ADMINISTRATION

This Steps for setting up for operation:

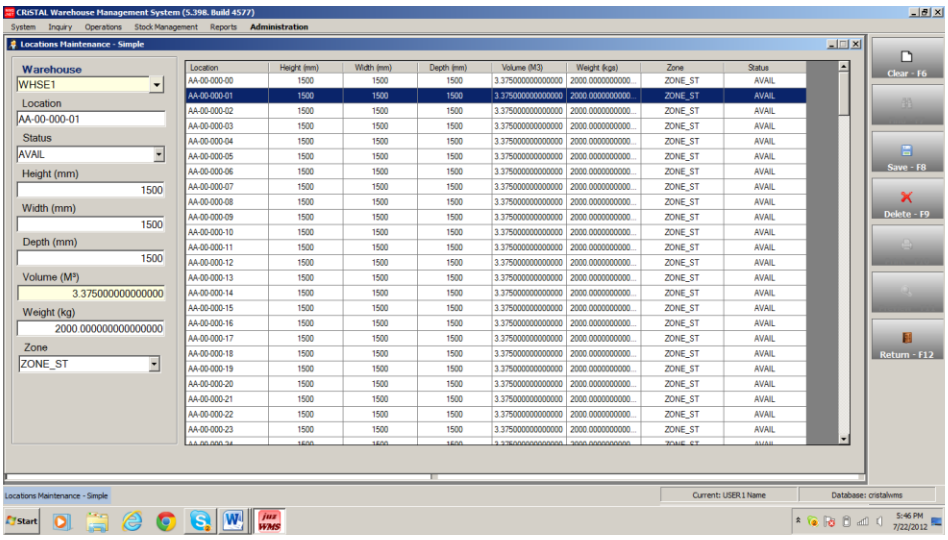
1. Location Maintenance - Simple
2. Client Entitles
    a. Client Profiles
    b. Customer Profiles
    c. Supplier Profiles
3. Products
    a. Product / Item Definition



2.1. Warehouse

The menu option available is

1. Location Maintenance – Simple



1. Select and double click on the location selected row.
2. Select, enter and update the fields require for change.
3. Enter 'Save' or F8 to complete.
4. Close and exit the page.

2.2. Client Entitles

Menu options as follows:

2.2.1. Client Profiles

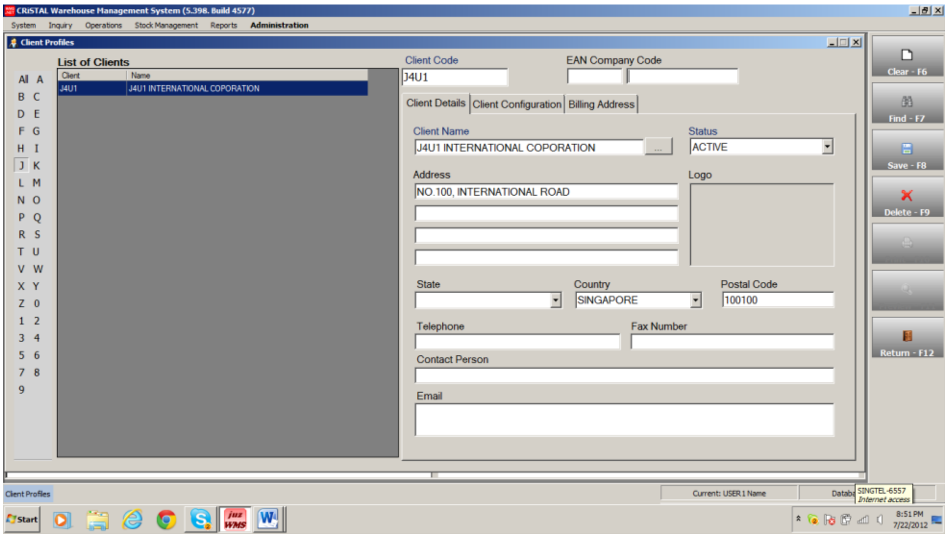


Fig.1

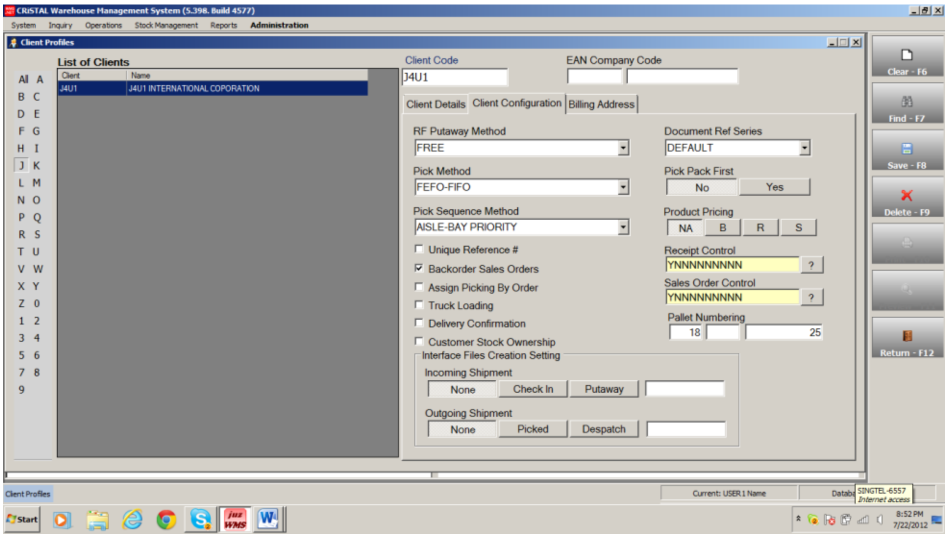
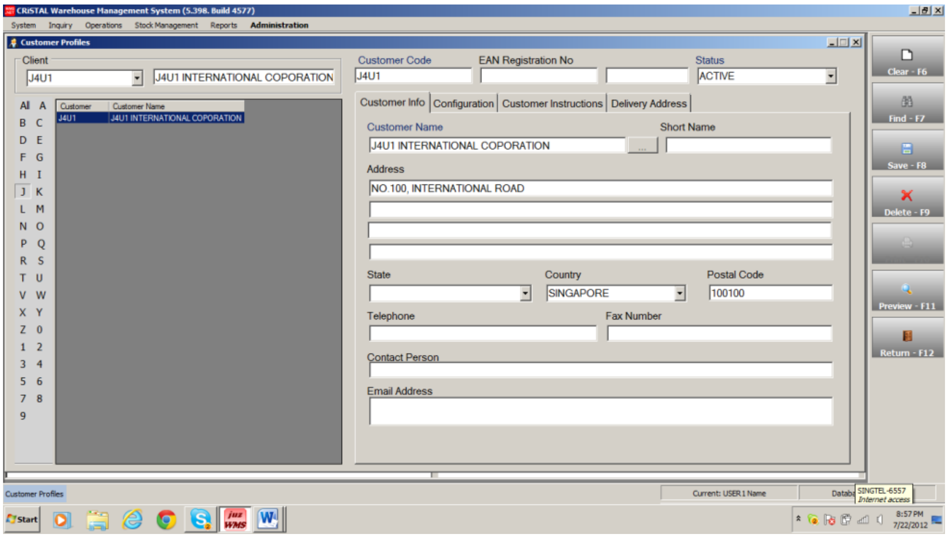


Fig.2

1. At Client Details (Fig.1), enter the preference code in the 'Client Code' field.
2. Enter the client's name at the 'Client Name' field.
3. Enter the address of the client at the 'Address' field.
4. Select and enter the client's country at the 'Country' field.
5. Enter the postal code, if require, at the 'Postal Code' field.

6. Enter the contact number if any at the 'Telephone' field.
7. Subsequently, if require, for more information of the client, enter the details at the 'Fax number', 'Contact Person' and 'The Email' fields.
8. Click on the 'Client Configuration' tab.
9. If require, select and enter the preference put away method at the RF Put-away Method (Fig.2).
10. Select and enter the preference document reference at the 'Document Ref Series' field.
    a. Select and enter 'DEFAULT'.
11. Select and enter the preference pick method at the 'Pick Method' field.
12. Select and enter the pick sequence method at the 'Pick Sequence Method' field.
13. If require check on the boxes next to the preference fields (eg. Backorder Sales Orders).
14. Enter 'Save' or F8 to complete.
    a. *Note: a message "Client information updated-Cristal." Enter 'Yes'.
15. If require to update the other information, just click onto the menus tab and enter the
    a. Preferences field and enter 'Save' or F8 to complete.
16. Close and exit the page.

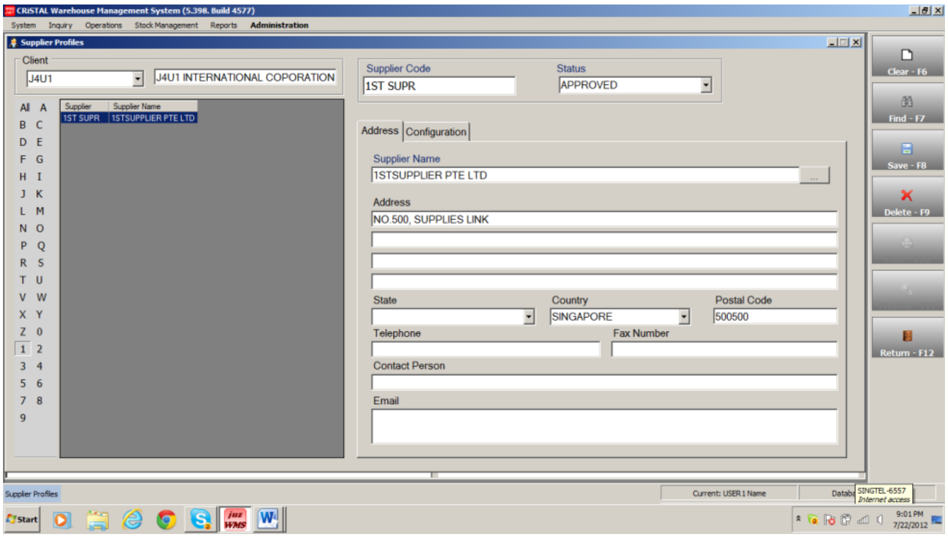
2.2.2. Customer Profiles



1. Select and enter the client of the client's customer at the 'Client' field.
2. Enter the customer code at the 'Customer Code' field.
3. At the Customer Info menu:
    a. Enter the customer name at the 'Customer Name' field.
    b. Enter the address of the customer at the 'Address' field.
    c. Select and enter the country of the customer at the 'Country' field.
    d. Enter the postal code at the 'Postal Code' field.

   e. If require, enter the information for all the other fields.
4. Enter 'Save' or F8 to complete.
   a. *Note: a message 'Customer updated'. Enter 'OK'.
   b. Follow by a message 'Delivery Address updated'. Enter 'OK'.
5. Click on the Delivery Address tab if the address is differ from the set up address of the customer.
   a. Enter 'Clear' or F6 and enter the new delivery address at Details 1.
   b. Click on Details 2 to continue update of information of the delivery address.
   c. Enter 'Save' or F8 to complete.
   d. *Note: a message "Customer updated." Enter 'OK'.
6. Enter 'Save' or F8 to complete.
   a. *Note: a message "Customer updated." Enter 'OK'.
7. Close and exit the page.

2.2.3. Supplier Profiles



1 Select and enter the client at the 'Client' field.
2 Enter the supplier code at the Supplier Code.
3 At the Address menu:-
   a Enter the supplier name at the 'Supplier Name' field.
   b Enter the address at the 'Address' field.
   c Select and enter the country at the 'Country' field.
   d Enter the postal code at the 'Postal Code' field.
   e If require, enter the information for all the other fields.
4 Enter 'Save' or F8 to complete.
   a *Note: a message 'Supplier detail updated. Cristal, xxxx, xxxx Supplier'. Enter 'OK'.
5 If require, click on the Configuration tab to update on the require fields.

a Enter 'Save' or F8 to complete.

6 Close and exit the page.

2.2.4. Product Item / Definition

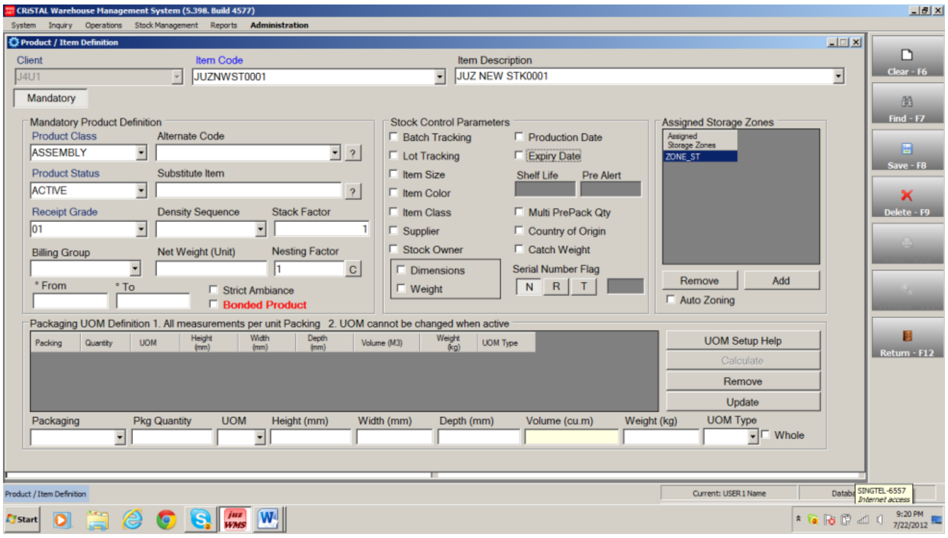


Fig.1

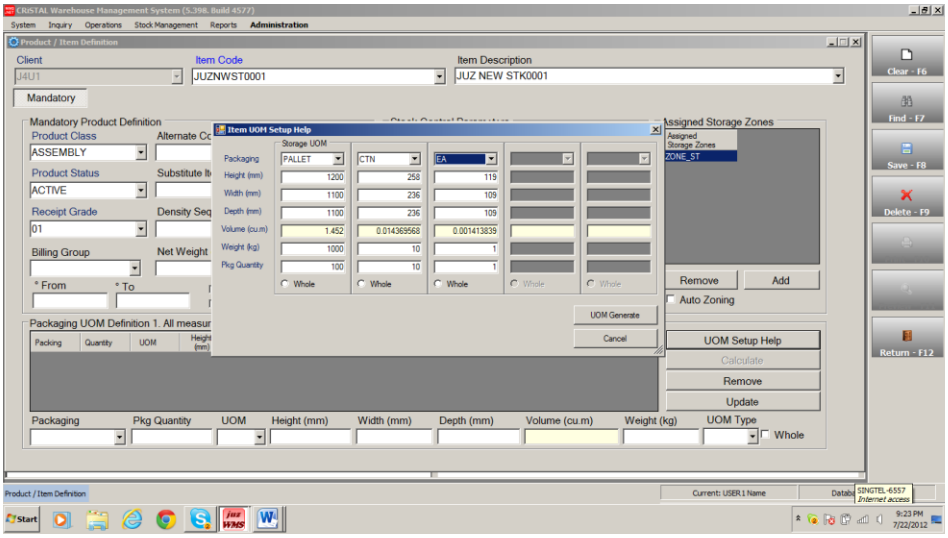
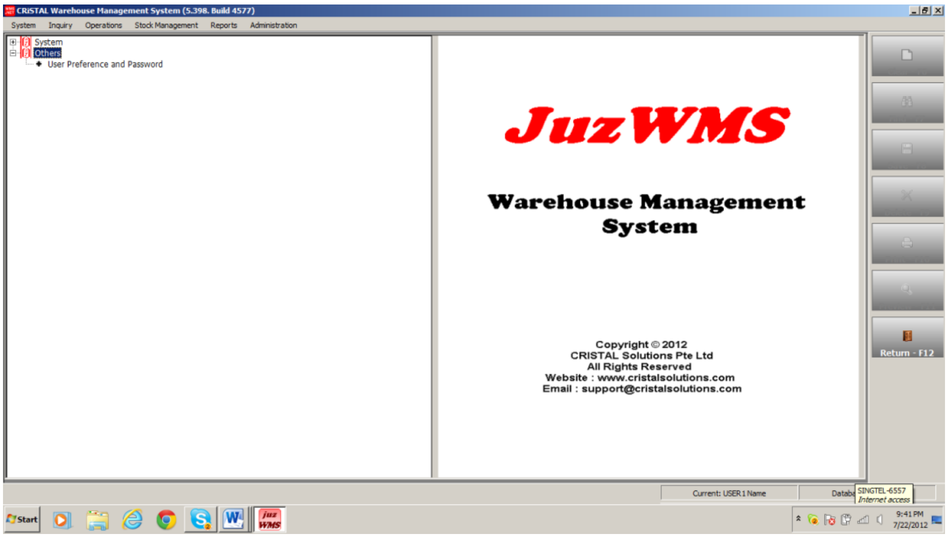


Fig.2

1. Select and enter a client name at the 'Client' field. (Fig.1)
2. Enter the item number/code at the 'Item Code' field.
3. Enter the item description at the Item 'Description' field.
4. Select and click on the checkbox option at the Stock Control Parameters menu.
5. Click on the 'Add' tab at the Assigned Storage Zones
6. Select and enter the preferences storage zone assign to.
7. Click on the 'UOM Setup Help' tab.
8. At the Item UOM Setup Help screen, the first level (column) Storage UOM (Fig.2), and packaging field must remain as "PALLET". Proceed to enter the dimensions (in

millimeters) of the height, width, depth, weight (in kilograms) and the packaging quantity of the full storage packaging on one pallet at the respective fields.
    a. Note*: The Volume (in cu.m) will be automatically calculated.
9. Select and enter the packaging UOM type (eg.: Ctn, bags, etc.) at the second level.
10. Enter the quantity of per package at the Pkg Quantity field.
    a. Note*: you can continue to set up another level of packaging UOM but it must be in a lower packaging quantity form.
11. Click on the UOM Generate tab for the next level of UOM packaging setup.
    a. Note*: a message 'Please ensure all fields are specified'. Enter 'OK'.
12. Select and enter the lowest UOM of the product / item (eg. Ea, pcs, meter, etc.) at the last level of the UOM setup.
13. Click on the 'UOM Generate' tab to complete the UOM setup.
14. Enter 'Save' or F8 to complete.
    a. Note*: a message "Item code updated". Enter 'OK'
15. If require, proceed to select and enter the information of each menus.
    a. Note*: Always enter 'Save' or F8 to complete updating of each menu.
16. Close and exit the page.

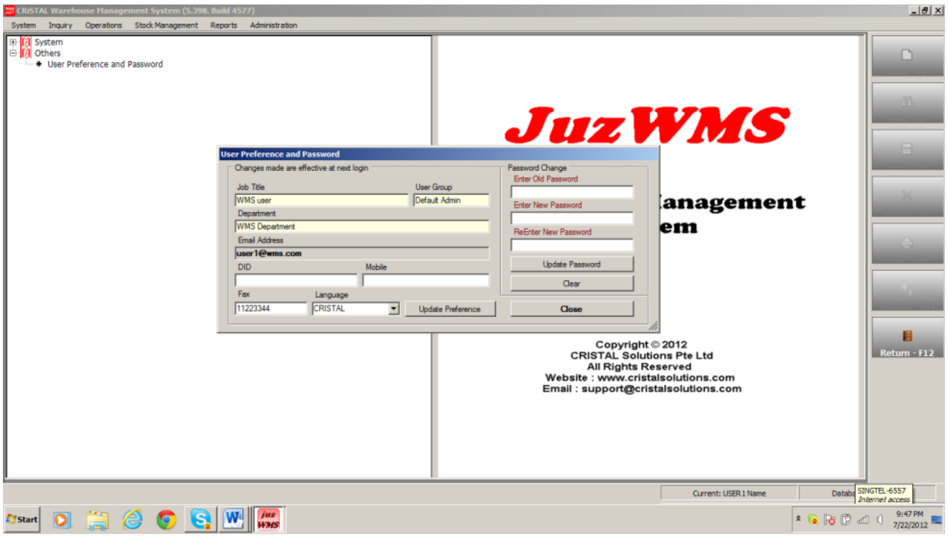
3. SYSTEM



3.1. Change a User password.

Users' password can be changed using the option:

1. User Preference and Password

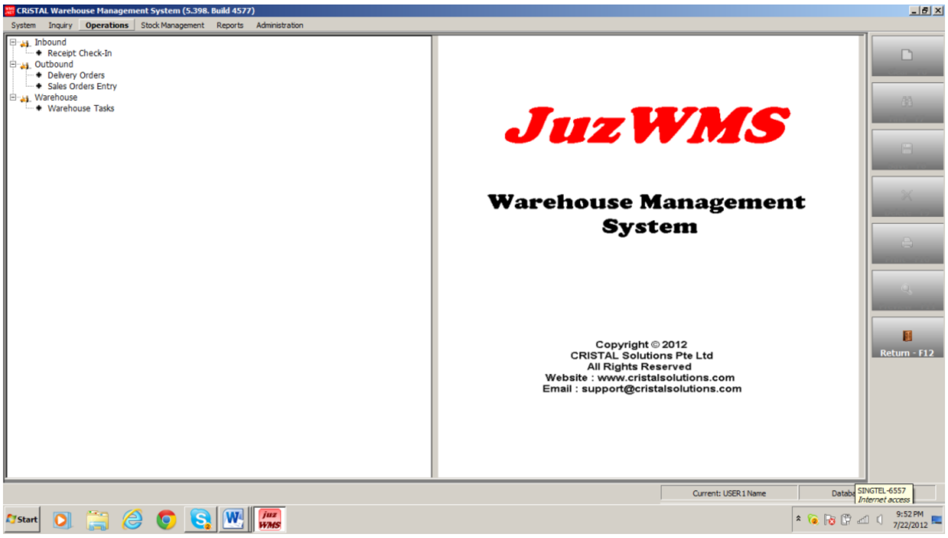


1. Click on the User Preference and Password menu.
2. Enter the current user password at the 'Enter Old Password' field.
3. Enter the new user password at the 'Enter New Password' field.
4. Enter again the new password at the 'Re-Enter New Password' field.
5. Click on the 'Update Password' tab to save the new password.
6. Click on the 'Close' tab to exit.

4. OPERATIONS

The Operations functions comprise of

1. Inbound
   a. Receipt Check-In
2. Warehouse
   a. Warehouse Tasks
3. Outbound
   a. Sales Orders
   b. Delivery Orders



4.1. Inbound

The Inbound function enables user to receive goods into the warehouse.

4.1.1. Receipt Check-In

The Receipt Check In is a 2 levels entry comprises of

1. Header
2. Details

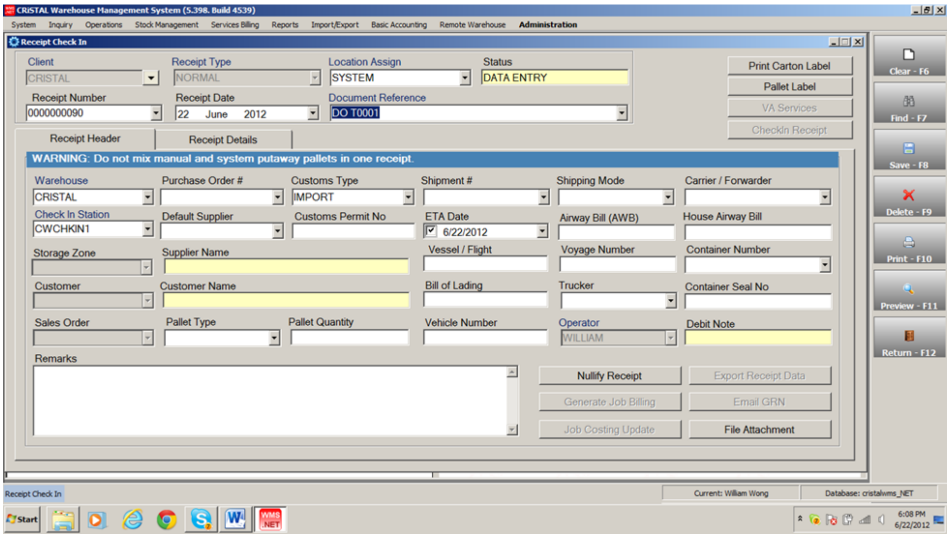


Fig. 1

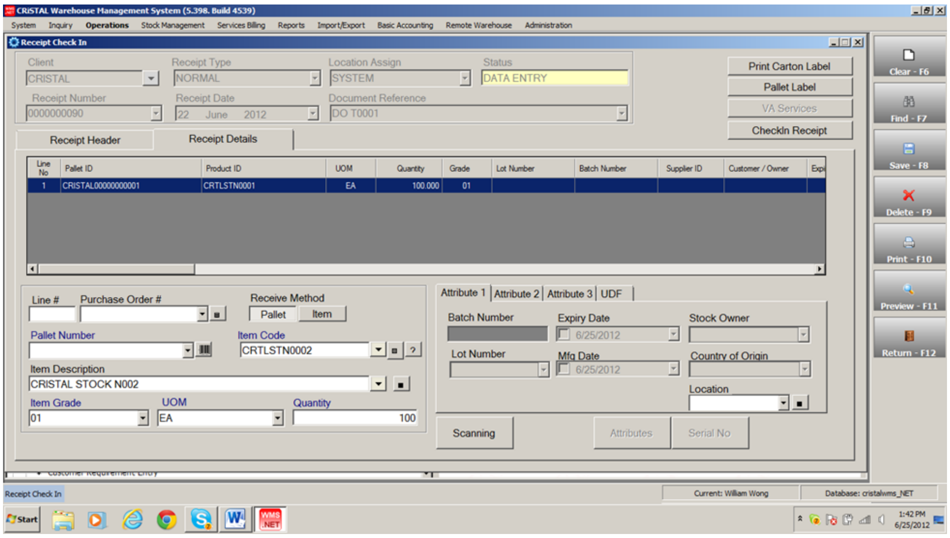


Fig.2

4.1.1.1. Receipt Header (Fig.1)

1. Select and enter the method of receiving into location at the ‘Location Assign’ field.
   a. By System means location to put-away is assign by the system.
   b. By Manual means location to put-away is assign manually.
2. Enter the reference number of the receiving document at the ‘Document Reference’ field.
3. Select and enter the supplier at the ‘Default Supplier’ field.
4. Enter ‘Save’ or F8.
5. Note*: a message, ‘Update New Receipt’. Enter ‘Yes’.
6. Follow by another message, ‘Receipt header update’. Enter ‘OK’.

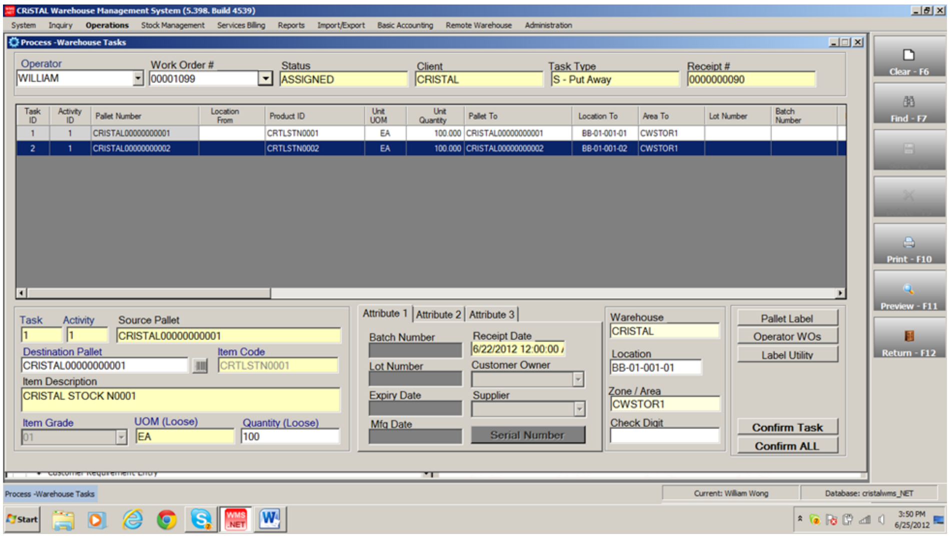
4.1.1.2. Receipt Details (Fig.2)

1. Click on the 'Receipt Details' tab.
2. Select and enter the product/item code at the 'Item Code' field.
3. Enter the quantity received at the 'Quantity' field.
4. Items which has attribute, enter the attributes at their respective fields.
5. For Manual Location Assign, enter and select the location at the 'Location' field to be put-away.
    a. For System Location Assign, proceed to step 6.
6. Enter 'Save' or F8 to save line item.
7. Enter 'Clear or F6 to proceed to the next new line item.
8. Continue step 2 to 7 till complete receiving of whole order.
9. Click on the 'Checkin Receipt' tab.
10. For System Location Assign:
    a. Note*: a message 'Receipt header update'. Enter 'OK'.
    b. Follow by message 'Confirm receipt for Put-away'. Enter 'Yes'.
    c. And the last message 'Receipt Check-In'. Enter 'OK'.
    d. *Proceed to Warehouse - Warehouse Task menu to complete confirming of put-away into locations.*
11. Manual Location Assign:
    a. Note*: a message 'Receipt header update'. Enter 'OK'.
    b. Follow by message 'Number of lines process:' Enter 'OK'.
    c. No further actions require for manual location assign.
12. Close and exit the page.

4.2. Warehouse

4.2.1. Warehouse Tasks

The function of the Warehouse Tasks is to confirm Putaway and Picks tasks.



1. Click on the drop down box of the ‘Work Order #’ field.
2. Select the required ‘Receipt # or Sales/Transfer Order’ line.
3. Click on the ‘Select’ tab.
    a. Select the Task ID to confirm that particular task only, click on the ‘Confirm Task’ tab.
    b. Click on the ‘Confirm All’ tab to confirm all the ID Task.
4. Note* a message ‘Work Order confirmed’. Enter ‘OK’.
5. Close and exit the page.

4.3. Outbound

The Outbound consists of Sales Orders Entry and generation of Delivery Orders

4.3.1. Sales Order Entry

Similar to Receipt Check In, this is a 2 levels order entry:

1. Header
2. Details

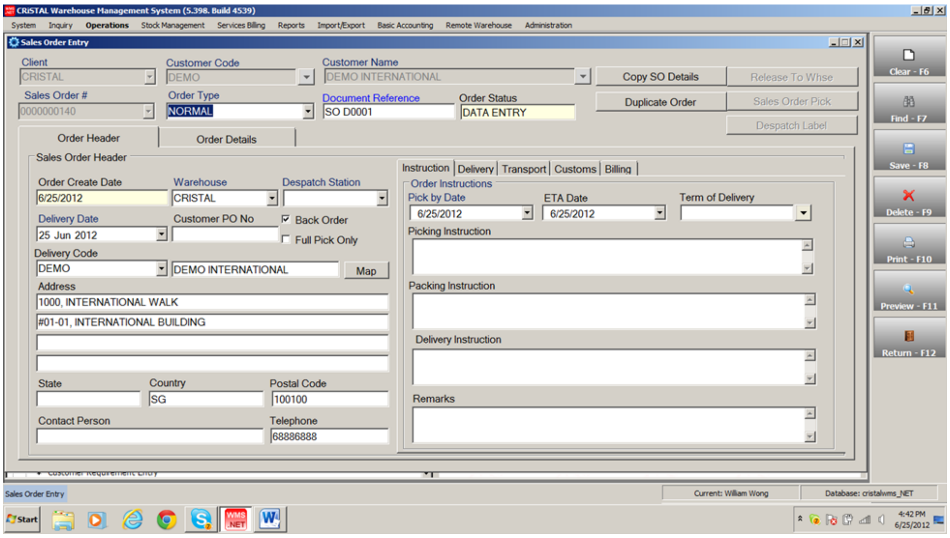


Fig.1

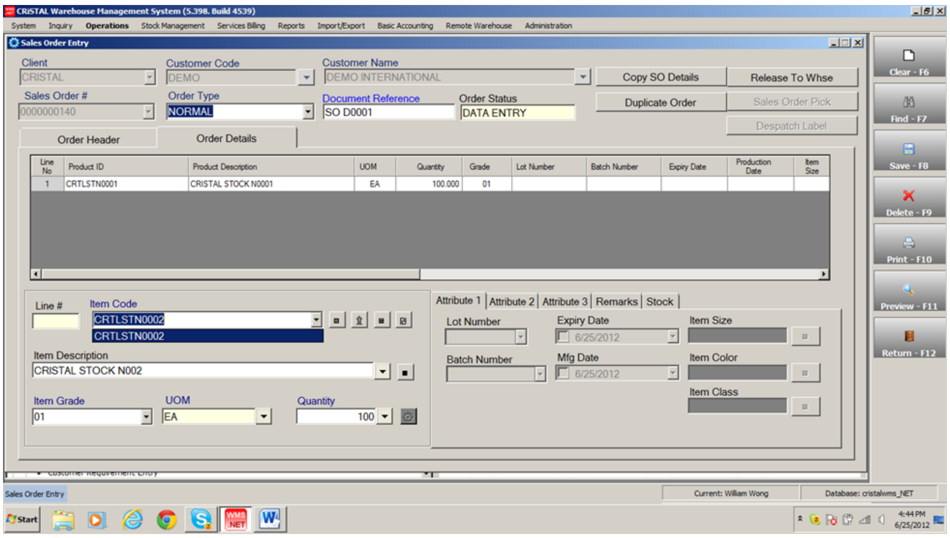


Fig.2

4.3.1.1. Order Header (Fig.1)

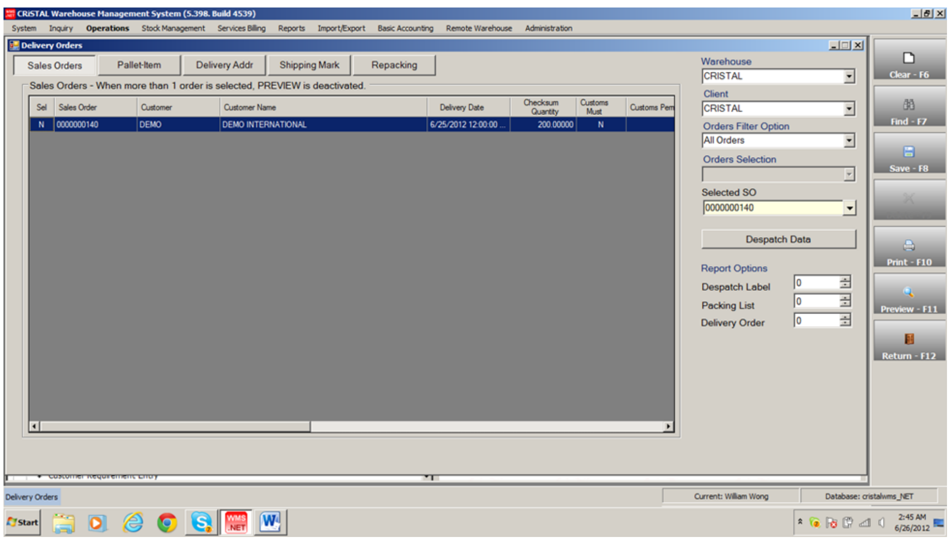
1. Select and enter the customer at the 'Customer Code' field.
2. Enter the reference number at the 'Document Reference' field.
3. Enter 'Save' or F8.

a. Note*: a message 'Create new Sales Order? '. Enter 'Yes'.
b. Follow by message 'Sales Order updated'. Enter 'OK'.

4.3.1.2. Order Details (Fig.2)

1. Click on the 'Order Details' tab.
2. Select and enter the product/item number at the 'Item Code' field.
3. Enter the quantity to pick at the 'Quantity' field.
4. Items which has attribute, enter the attributes at their respective fields.
5. Enter 'Save' or F8 to save line item.
6. Continue step 2 to 5 till complete creating of whole order.
7. Click on the 'Release To Whse' tab,
    a. Note*: a message 'Sales Order released for picking'. Enter 'OK'.
    b. Follow by message 'Generate Pick Tasks Now?' Enter 'Yes'.
    c. And the last message 'Pick tasks created – xxxxxxxxx'. Enter 'OK'.
8. Click on the 'Sales Order Pick' tab.
    a. Note*: a message 'Assign Picks Orders?'
    b. Enter 'Yes'- a Warehouse Task (SO) screens appear:-
    a. Select the Task ID to confirm that particular task only. Click, on the 'Confirm Task' tab.
    b. Click on the 'Confirm All' tab to confirm all the ID Task.
        i. Note*: a message 'Work Order confirmed'. Enter 'OK'.
    c. Enter 'No' if picking tasks is done later.
9. Close and exit the page.
10. "REMEMBER" when picking tasks is completed, *Proceed to Warehouse - Warehouse Task* menu to complete confirming of picking tasks.

4.3.2. Delivery Orders

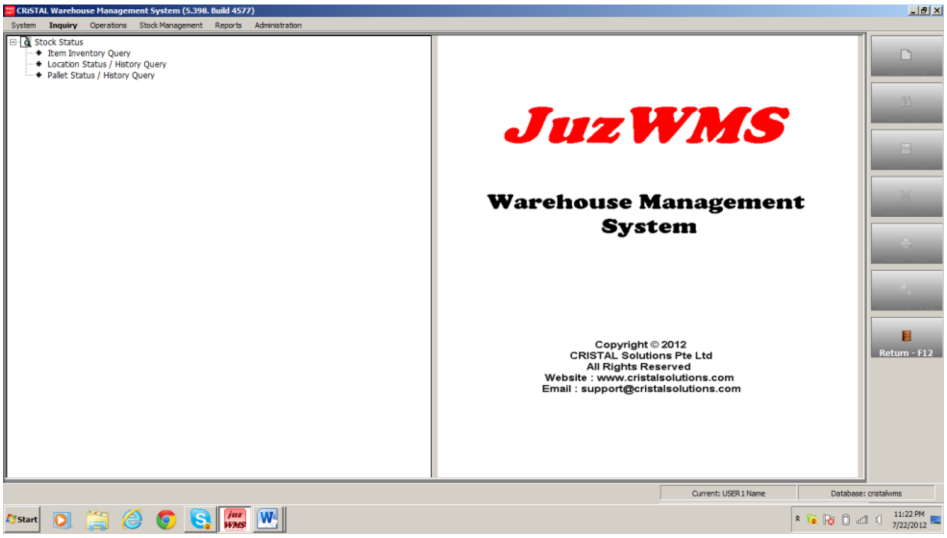


1. Select and enter the warehouse at the ‘Warehouse’ field
2. Select and enter the client at the ‘Client’ field.
3. Select the ‘Sales Order’, double clicks on the selected row and ensures the ‘Sel’ column change to ‘Y’.
4. Select and enter the numbers of delivery order require at the ‘Delivery Order’ field.
5. Enter ‘Preview’ or F11 to complete.
6. Note*: a message ‘Pallets updated’. Enter ‘OK’.
7. Close and exit the page.

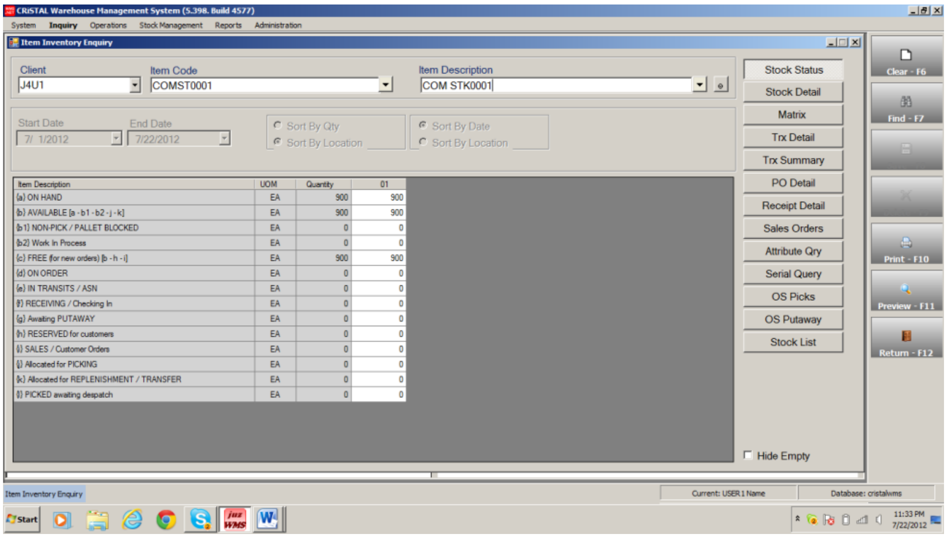
5. INQUIRY

Following query functions are provided in the system

1. Item Inventory Query
2. Location Status / History Query
3. Pallet Status / History Query

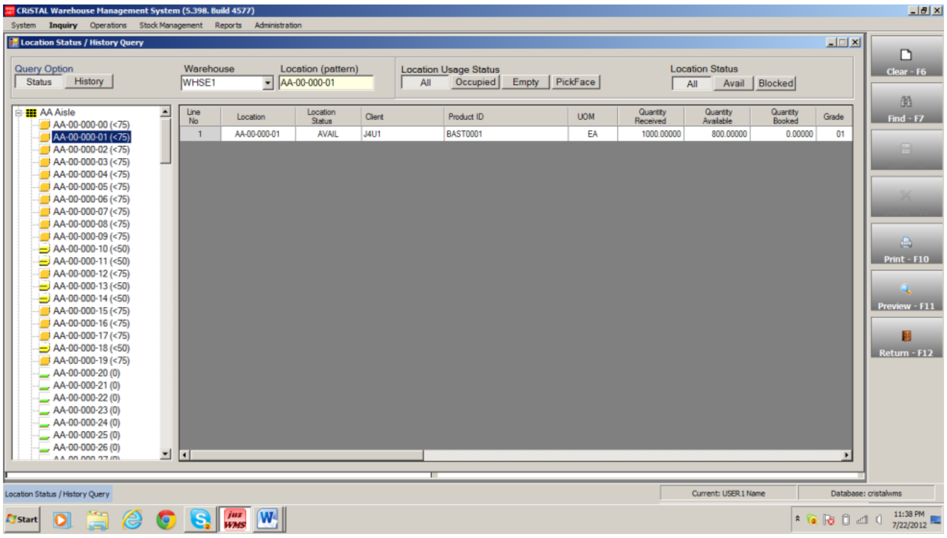


5.1. Item Inventory Query



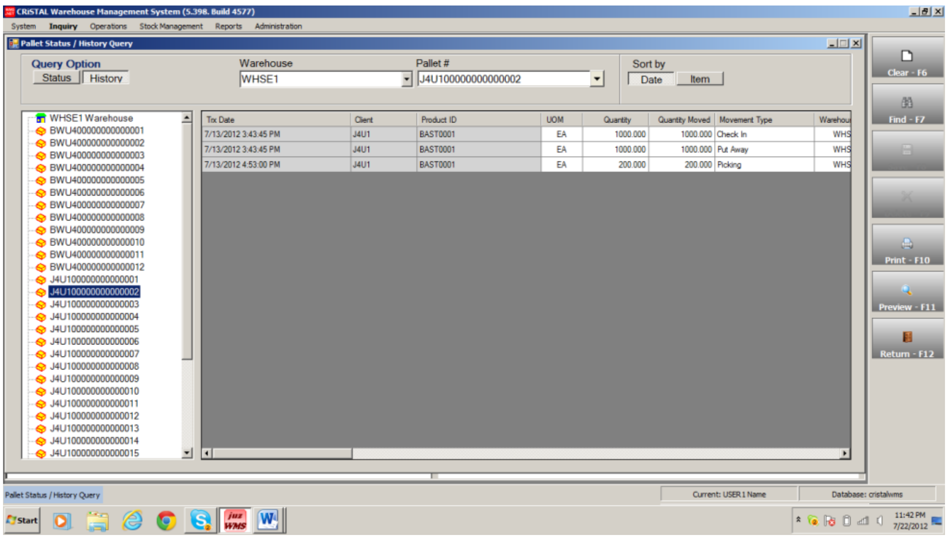
1. Select and enter the client at the 'Client' field.
2. Select and click on the respective tabs for their queries.
3. Select and enter information if require at some of the queries.
4. Close and exit the page.

5.2. Location Status / History Query



1. Select and enter the warehouse at the ‘Warehouse’ field.
2. Select and enter the Aisle and the location for particular location status query.
3. Alternately, click on the tabs at the Location Usage Status for their respective queries.
4. Click on the ‘History’ tab at the Option Query field for its histories information.
5. Select and enter dates from and to at the ‘Start Date’ and ‘End Date’ respectively.
6. Select and click on either ‘Date’ or ‘Item’ tab at the ‘Sort By’ field.
7. Select and enter the Aisle and the location require for query.
8. Close and exit the page.

5.3. Pallet Status / History Query



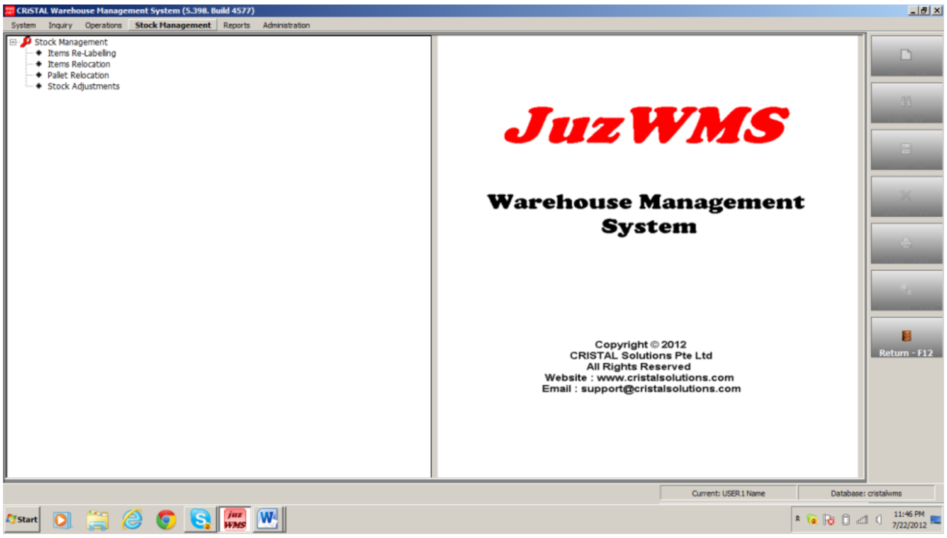
1. Select and enter the warehouse at the ‘Warehouse’ field.

2. Select and enter the Pallet number at the selected Warehouse column (left) OR enter the first few prefix of the pallet number at the 'Pallet #' field and then click on the drop down box and double click on the require pallet number.
3. Click on the 'History' tab at the Option Query field for its histories information.
4. Select and click on either 'Date' or 'Item' tab at the 'Sort By' field.
5. Repeat step 2.
6. Close and exit the page

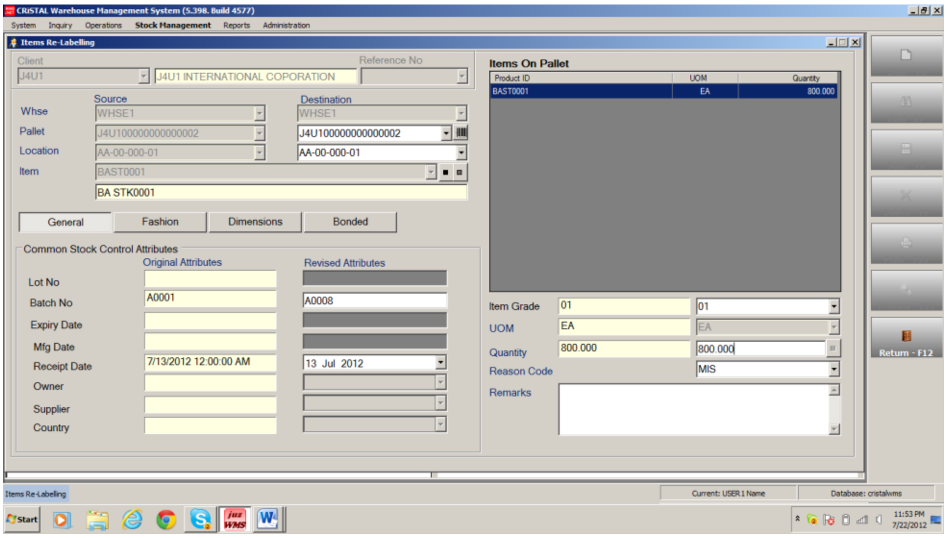
6. STOCK MANAGEMENT

Managing of stock transfers, attributes changes and adjustments.

1. Items Re-labeling
2. Items Relocation
3. Pallet Relocation
4. Stock Adjustments



6.1. Items Re-labelling

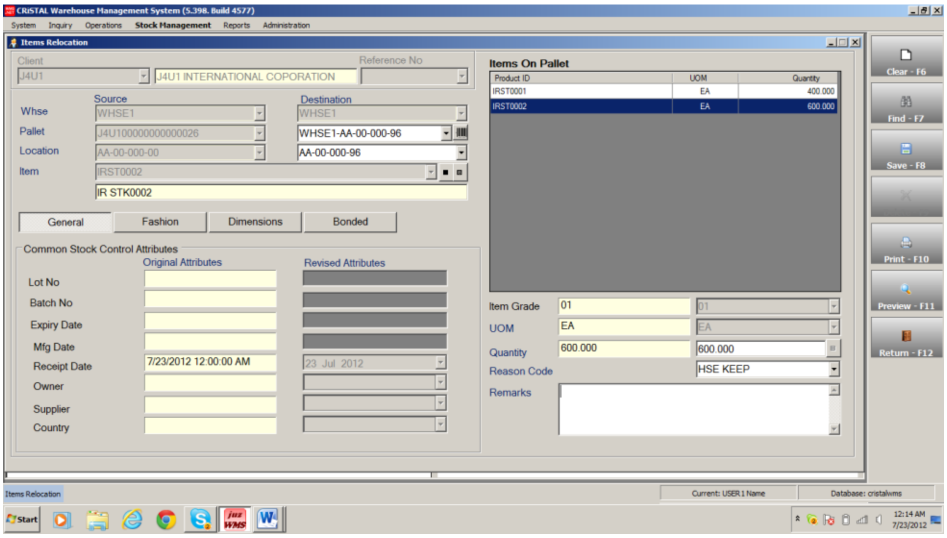


1. Select and enter the client at the ‘Client’ field.
2. Select and enter the pallet ID at the ‘Source Pallet’ field.
3. Select and enter the change attribute at the ‘Revised Attributes’ field.
4. Enter the change quantity at the right of the ‘Quantity’ field.
5. Select and enter the reason at the ‘Reason Code’ field.
6. Enter ‘Save’ or F8 to complete.

- Note*: a message 'Item Re-label updated'. Enter 'OK'.

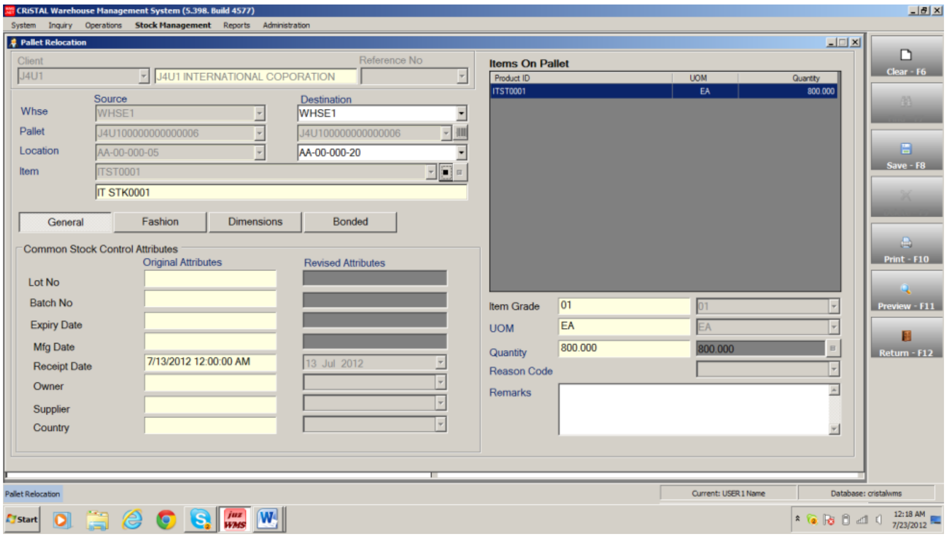
7. Close and exit the page

6.2. Items Relocation



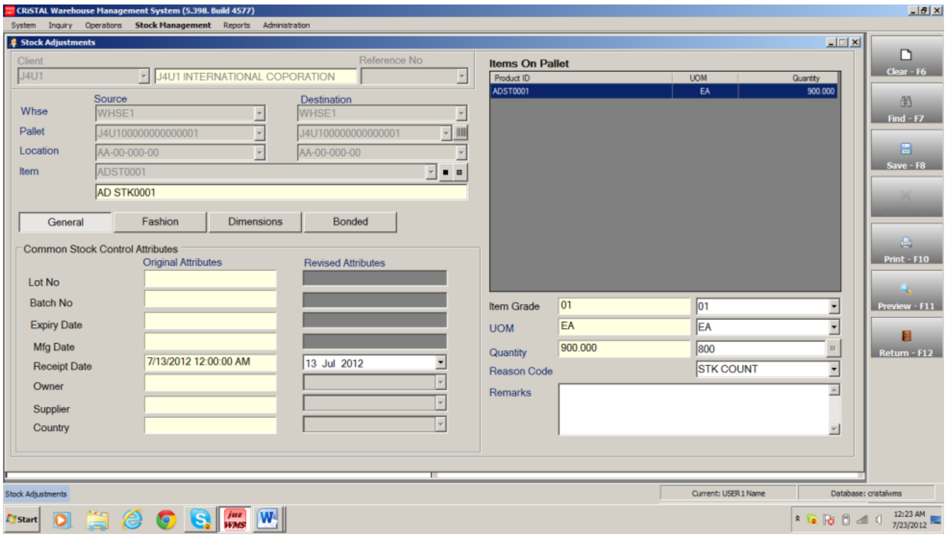
1. Select and enter the client at the 'Client' field.
2. Select and enter the pallet ID at the 'Source Pallet' field.
3. Select or enter the location for item transfer to at the 'Destination Location' field.
4. Enter the quantity to transfer at the right of the 'Quantity' field.
5. Select and enter the reason at the 'Reason Code' field.
6. Enter 'Save' or F8 to complete.
   - Note*: a message 'Item Transfer updated'. Enter 'OK'.
7. Close and exit the page.

6.3. Pallet Relocation



1. Select and enter the client at the ‘Client’ field.
2. Select and enter the pallet ID at the ‘Source Pallet’ field.
3. Select or enter the location to transfer to at the ‘Destination Location’ field.
4. Enter ‘Save’ or F8 to complete.
    - Note*: a message ‘Item Transfer updated’. Enter ‘OK’.
5. Close and exit the page.

6.4. Stock Adjustments



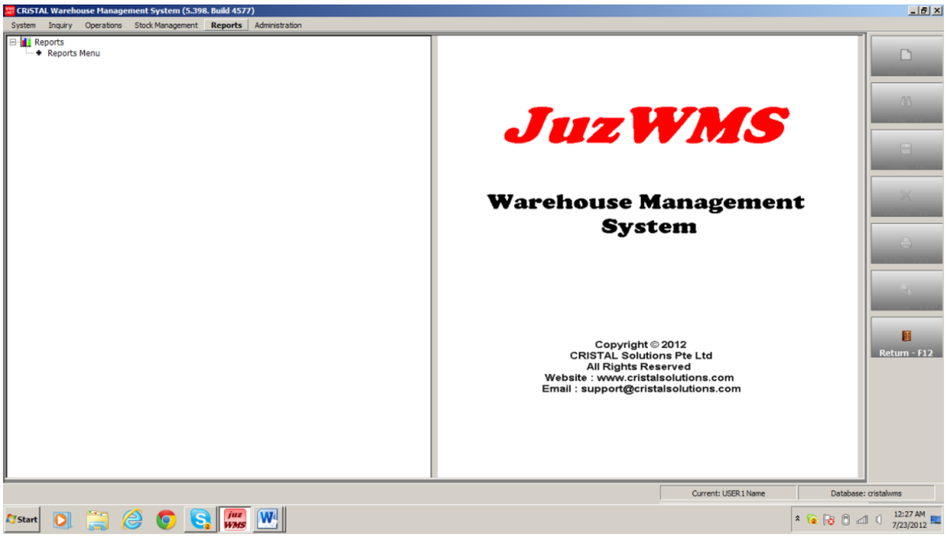
1. Select and enter the client at the ‘Client’ field.
2. Select and enter the pallet ID at the ‘Source Pallet’ field.
3. Enter the quantity adjusted to at the right of the ‘Quantity’ field.
4. Select and enter the reason at the ‘Reason Code’ field.
5. Enter ‘Save’ or F8 to complete.
    a. Note*: a message ‘Item stock adjusted’. Enter ‘OK’.

6. Close and exit the page.

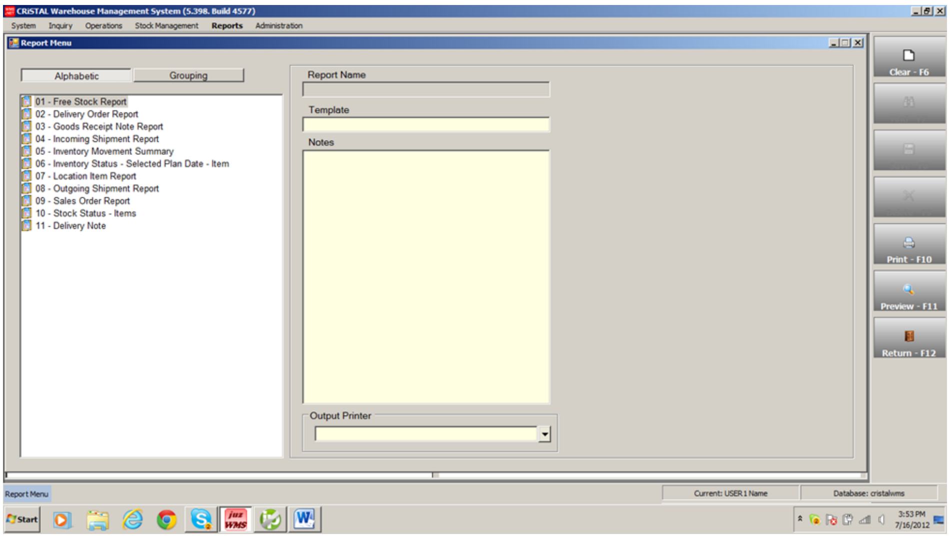
7. REPORTS

Following reports are provided with the system:

1. Free Stock Reports
2. Delivery Order Reports
3. Good Receipt Notes Reports
4. Incoming Shipment Reports
5. Inventory Movements Summary
6. Inventory Status – Selected Plan Date – Item
7. Location Item Report
8. Outgoing Shipment Reports
9. Sales Orders Report
10. Stock Status – Items
11. Delivery Note



Click on Reports to list the reports that are provided with the system



1. Click on the Reports Menu to open a list of reports (Fig.1).
2. Select and enter the require report.
3. Enter the details require for that selected report.
    a. All mandatory* fields must be enter.
4. Enter 'Preview' or F11 to preview the report.
5. Enter 'Print' or F10 to print report.
6. Close and exit the page.

7.1. Sample of Reports

Following sample of the available reports

7.1.1. Free Stock Reports

7.1.2. Delivery Order Reports

7.1.3. Good Receipt Notes Reports

7.1.4. Incoming Shipment Reports

7.1.5. Inventory Movements Summary

7.1.6. Inventory Status – Selected Plan Date – Item

7.1.7. Location Item Report

7.1.8. Outgoing Shipment Reports

7.1.9. Sales Orders Report

7.1.10. Stock Status – Items

7.1.11. Delivery Note