WMSNET User Guide

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1. CRISTAL WMSNET

WMSNET is an ASP.NET web application. It is a small subset of CRISTAL Desktop WMS application for accessing CRISTALWMS reports, Querying on Item Inventory, keying in Sales Order etc. from a web browser. The purpose of WMSNET is to facilitate warehouse owner to allow its customers to access status of stock in the warehouse via a website. WMSNET is optimised to be used with Microsoft Internet Explorer 6 and above.

Note : The functions of the WMSNET's Reports Menu, Item Inventory Query, Sales Order Entry is similar to the Desktop WMS application.

2. LOGGING IN

To use CRISTAL WMSNET, a user needs to have a user account and password.

Each User is assigned to a particular Access Group, which controls the type of reports, the number of Items that the user is able to have access to.

It is the function of the CRiSTAL WMS system administrator to set up and manage the user account.

The Login screen of WMSNET is shown in Figure 2.0.

Figure 2.0

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2.1. Changing Login Screen Logo

The images (in JPG format) displayed in the WMSNET application are referenced from the "\Graphics" subdirectory. By default, the 2 files:

1. Logo.jpg
2. Logo_small.jpg

contain the CRISTAL logo. To display your own images, simply replace these files with those containing your own logo. Typically, WMSNET is installed on the "C:\inetpub\wwwroot\wmsnetxxx" directory, where xxx denotes the WMSNET version. If in doubt, please consult CRISTAL Solutions for advice.

3. MAIN MENU

Figure 3.0 shows the Main Menu web page once a user has successfully logged into it. There are 3 functions available. Namely, Reports Menu, Item Inventory Query and Sales Order Entry.

To access any of the function just move your mouse over the function and click on it.

Figure 3.0

4. REPORTS MENU

Figure 4.0 depicts the Reports web page and displays the type of reports each user is authorised to access to.

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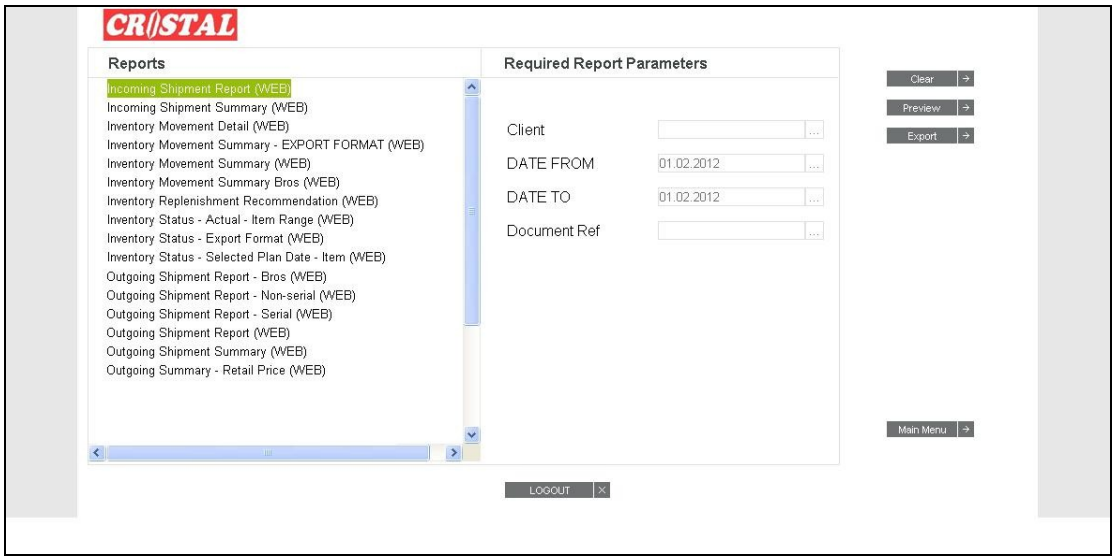

Figure 4.0

4.1. Report Accessibility

Access to the WMSNET web reports is controlled from the Desktop WMS **Administration > User Group** program option as shown in Figure 4.1. To grant ("Y") or deny ("N") access to a particular report, just double click to toggle the Grant column to "Y" or "N".

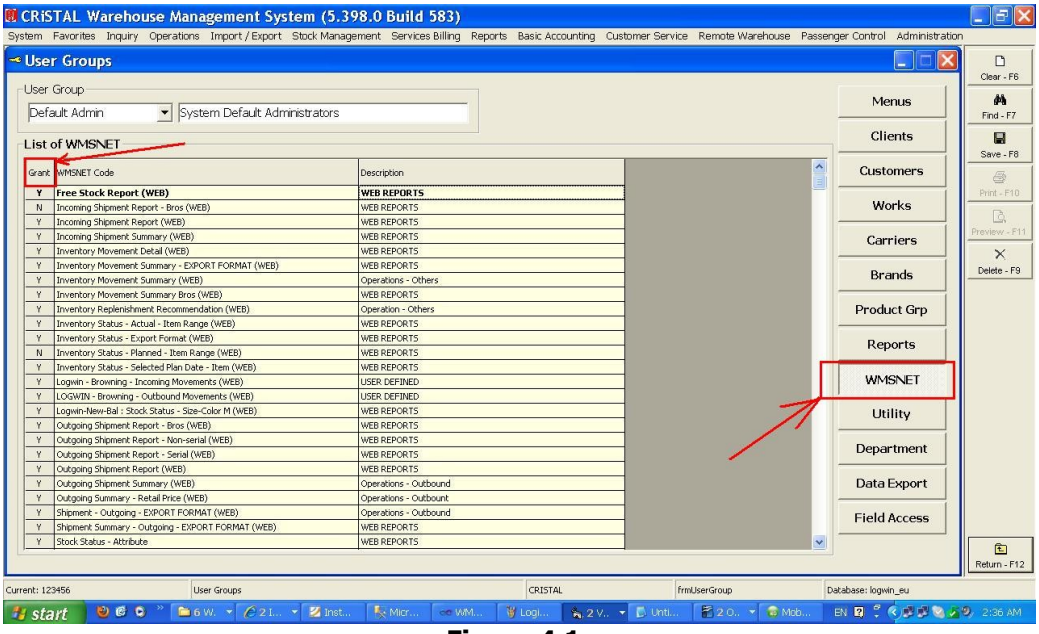

Figure 4.1

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4.2. Viewing Report

To view a report, click on the Preview button after entering the parameters. If a parameter is mandatory then the system will display a dialog box to prompt the user to enter it once the Preview button is clicked. Figure 4.2 shows the report in PDF.

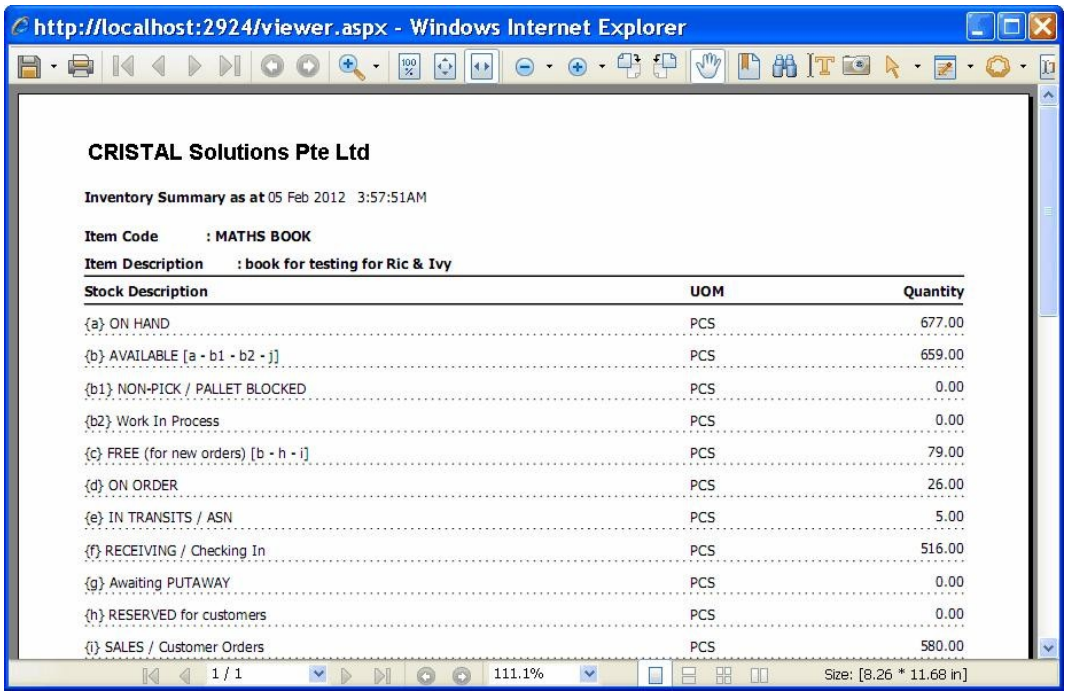

Figure 4.2

4.3. Exporting Report

To export a report to either Excel or Table style format, just click on the Export button as shown in Figure 4.3 (in the red box). Select the option and click Go. A dialog box will then be shown to prompt user to save or open the file as shown in Figure 4.4.

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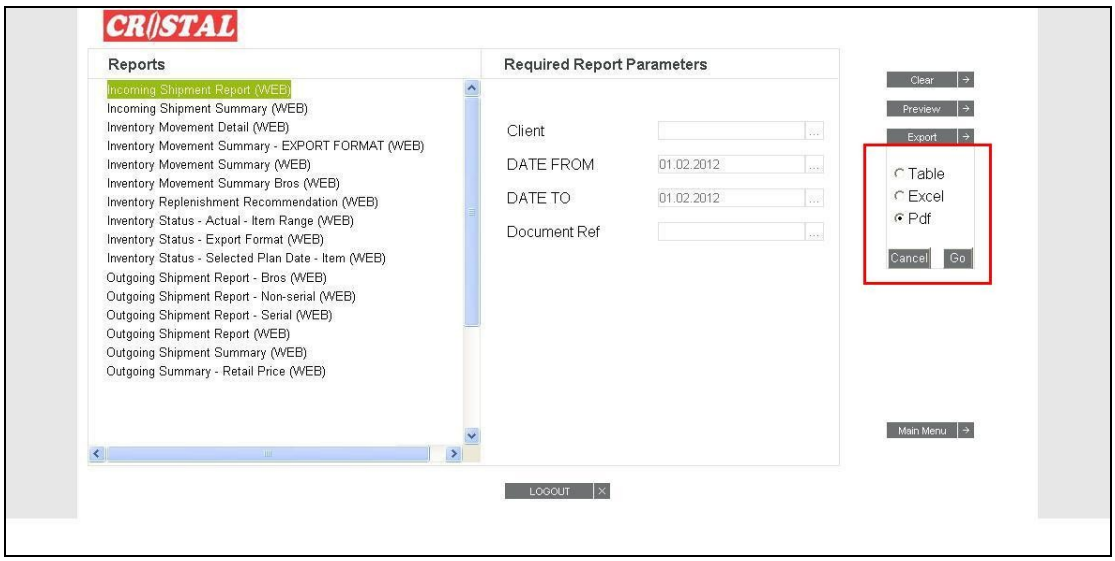

Figure 4.3

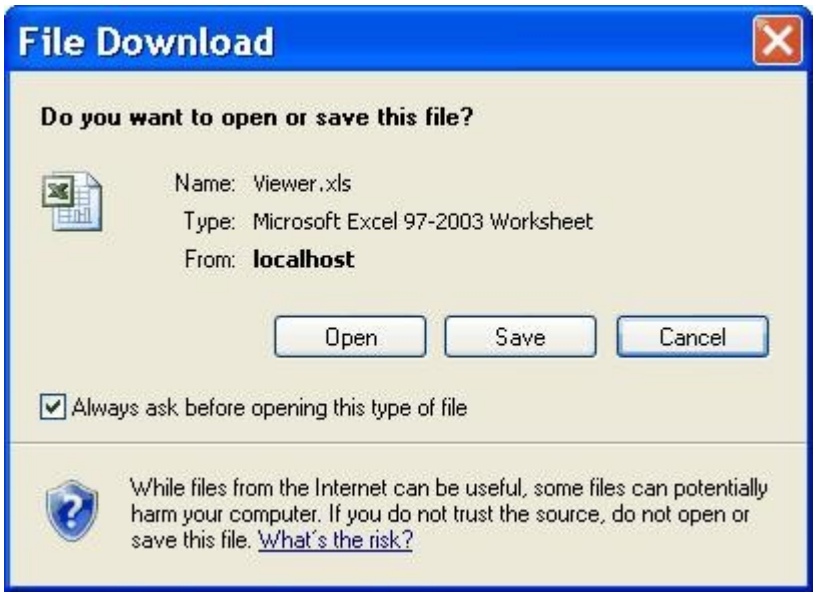

Figure 4.4

5. ITEM INVENTORY QUERY

Figure 5.0 depicts the Item Inventory Query web page. In order to make any query, a client and an item which are mandatory must be entered before clicking the "Find" button.

To view different results of a query like Transaction Details, Items Attribute etc. just click on the tab as shown by the arrow in Figure 5.0.

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Figure 5.0

5.1. Stock Status

Figure 5.1 depicts the results of Stock Status query after entering a client and an item, and click on the "Find" button.

Figure 5.1

5.2. Stock Details

Figure 5.2 depicts the results of Stock Details query after entering a client and an item. To view the report in PDF click on the "Print" button. To export the query results into Excel format then click on the "Export" button.

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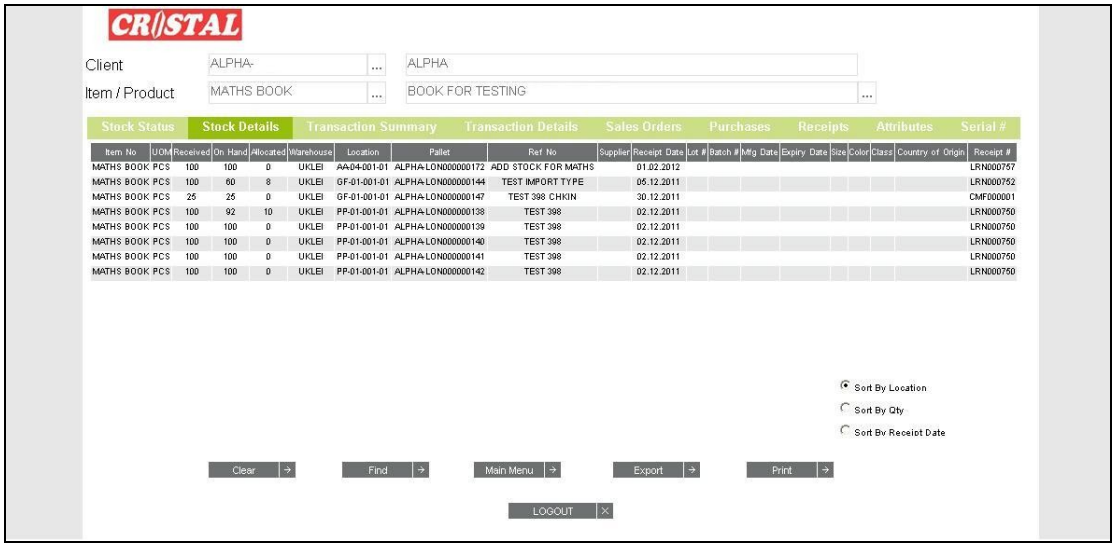

Figure 5.2

5.3. Transaction Summary

Figure 5.3 depicts the results of Transaction Summary query after entering a client and an item. Start Date and End Date fields are mandatory parameters for the query.

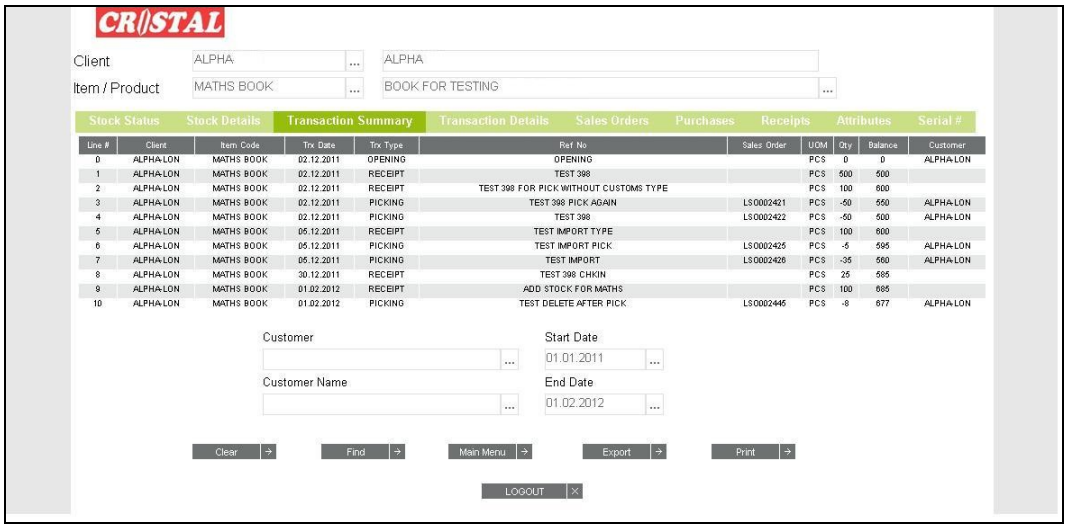

Figure 5.3

5.4. Transaction Details

Figure 5.4 depicts the results of Transaction Details query after entering a client and an item. Start Date and End Date fields are mandatory parameters for the query.

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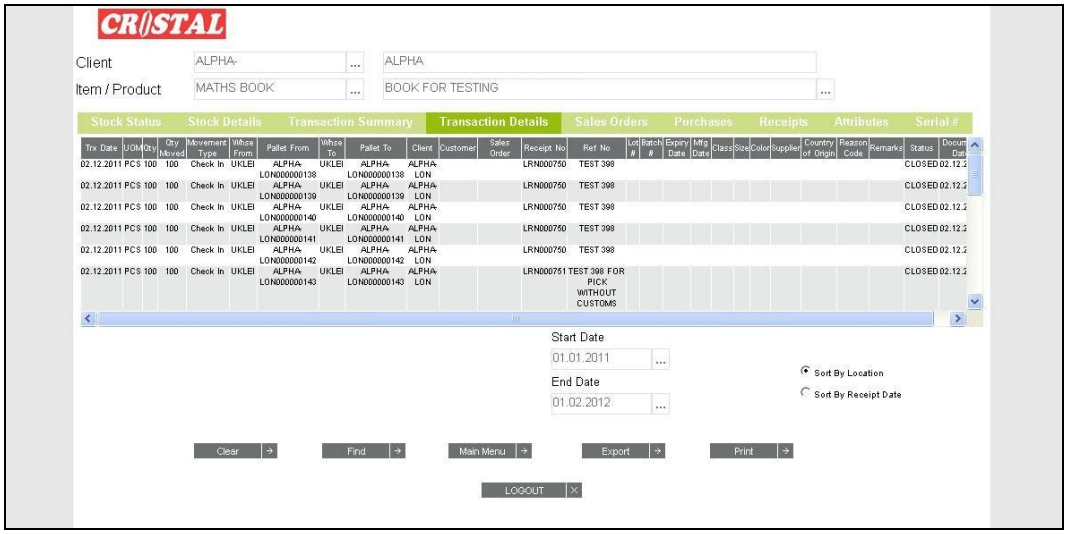

Figure 5.4

5.5. Sales Orders

Figure 5.5 depicts the results of Sales Orders query after entering a client and an item. Start Date and End Date fields are mandatory parameters for the query.

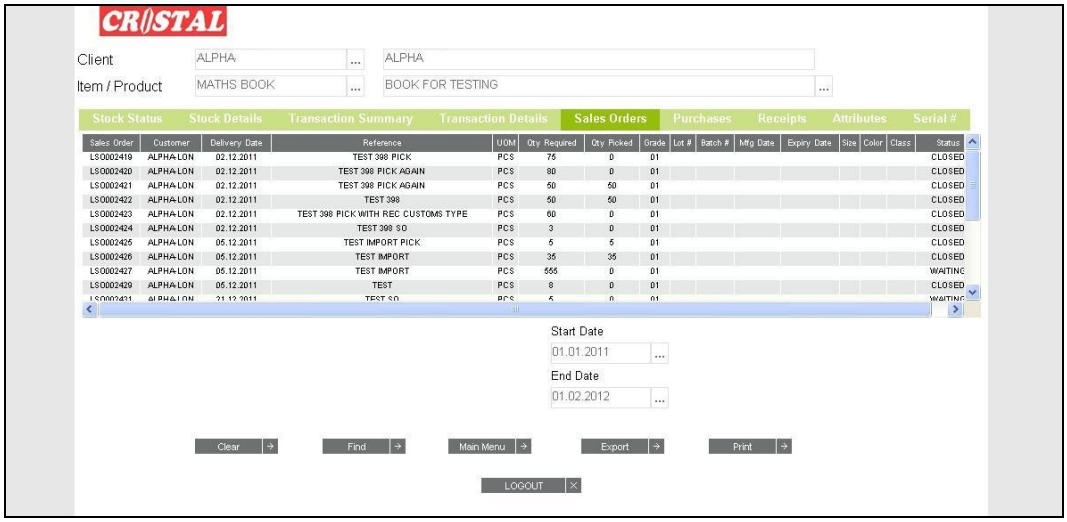

Figure 5.5

5.6. Purchase

Figure 5.6 depicts the results of Purchase query after entering a client and an item. Start Date and End Date fields are mandatory parameters for the query.

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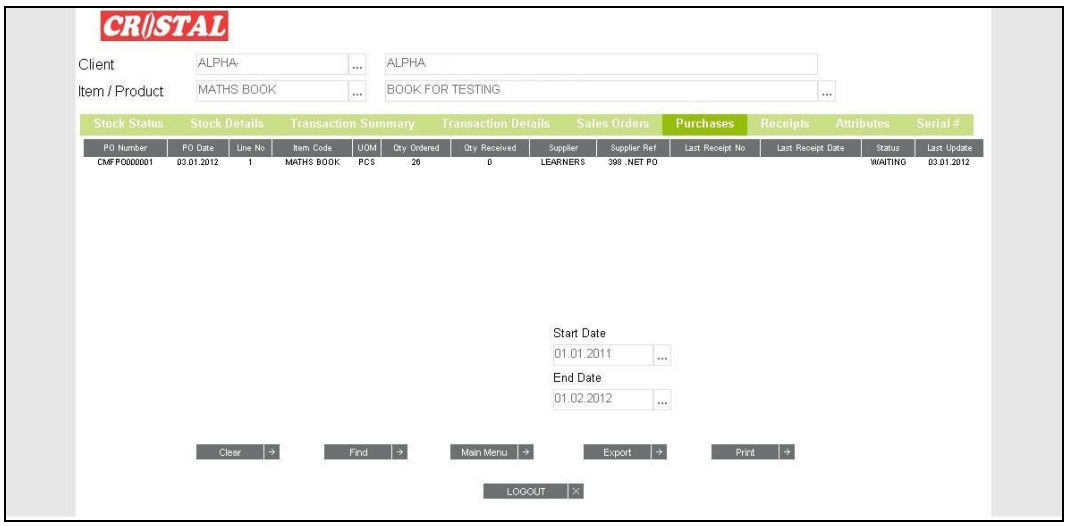

Figure 5.6

5.7. Receipts

Figure 5.7 depicts the results of Receipts query after entering a client and an item. Start Date and End Date fields are mandatory parameters for the query.

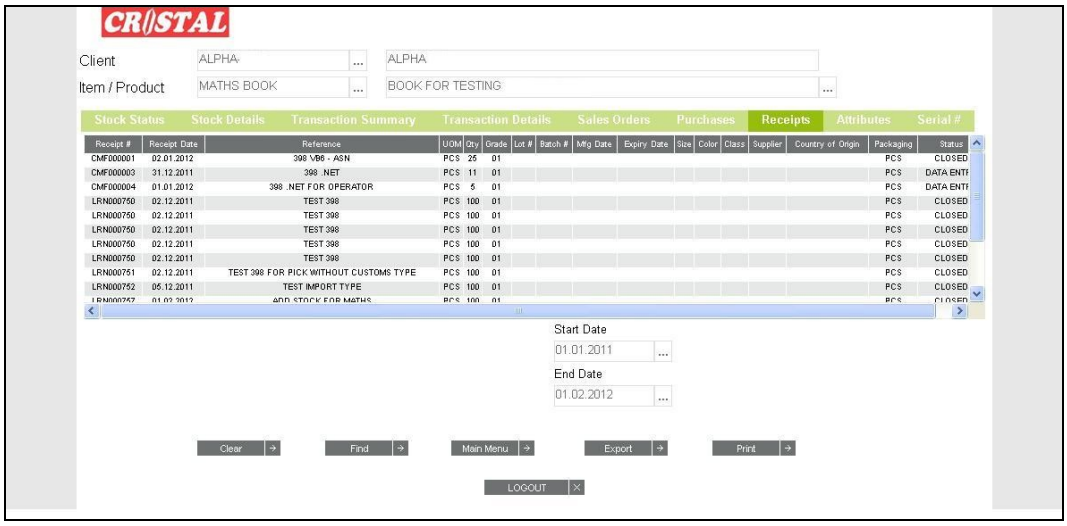

Figure 5.7

5.8. Attributes

Figure 5.8 depicts the results of Attributes query after entering a client and an item.

Results can be further filtered by different attributes like Grade, Lot Number, Batch Number etc. For example, to find item for different Grade, either enter the desire Grade or select one from the help list, and then click on the "Find" button.

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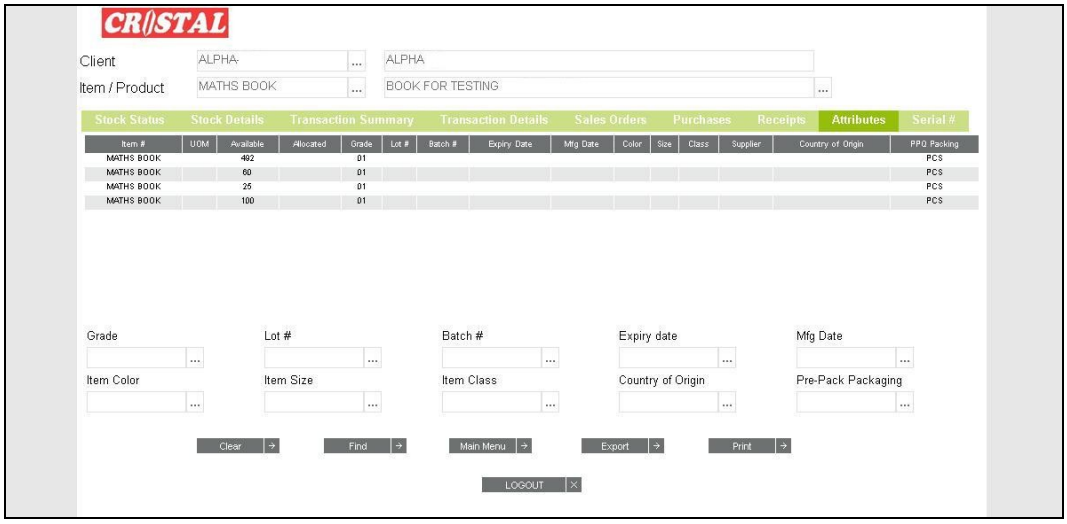

Figure 5.8

5.9. Serial

Figure 5.9 depicts the results of Serial query after entering a client and an item.

Results can be further filtered by different options like Location, Pallet Number, Serial Number etc.

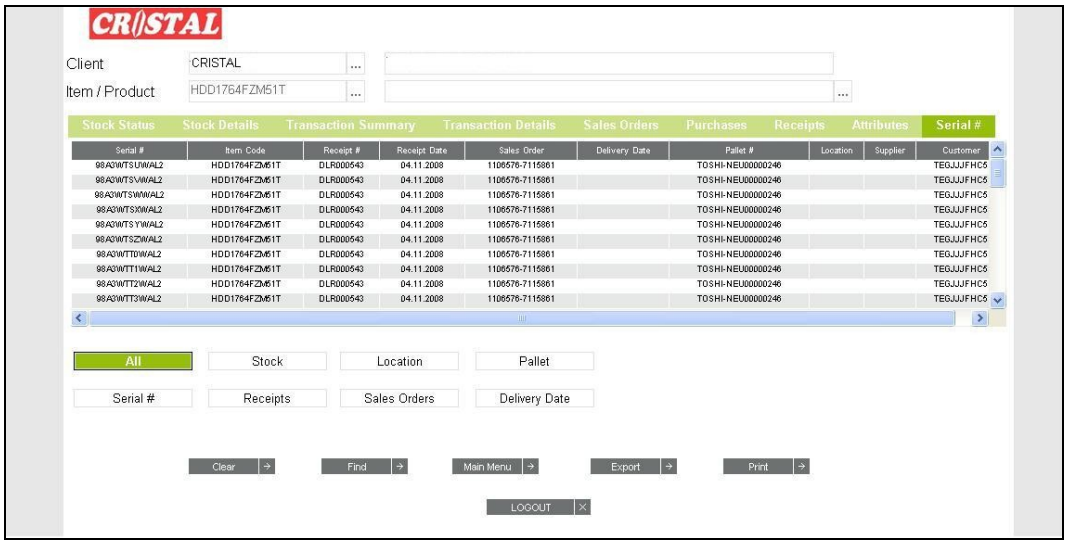

Figure 5.9

6. SALES ORDER ENTRY

Figure 6.0 depicts the Sales Order Entry web page.

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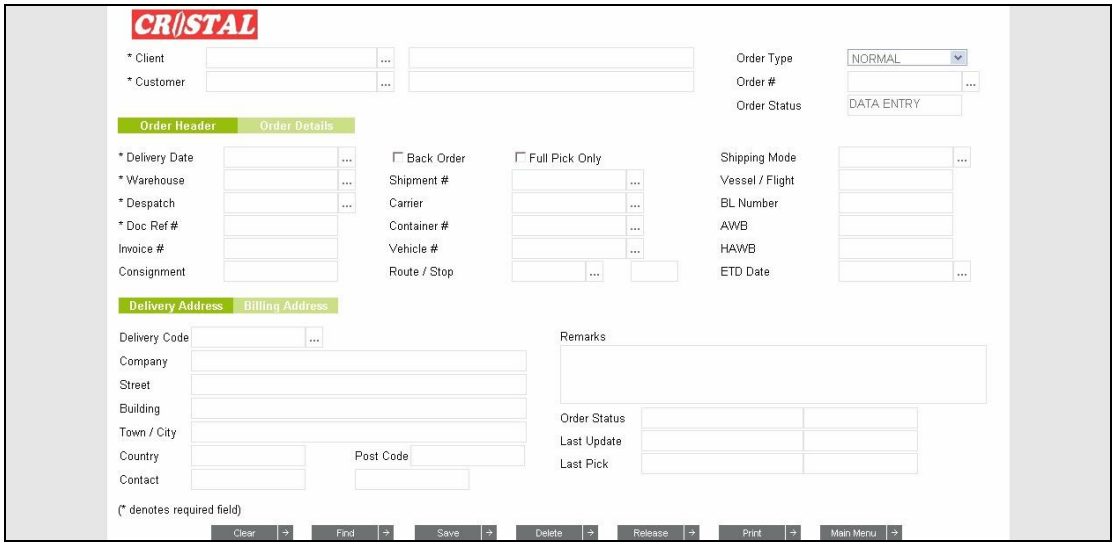

Figure 6.0

6.1. New Sales Order

To create new Sales Order (SO), do the following steps :

1) Select a client from the pop-up help list
2) Select a customer from the pop-up help list
3) Select a date for the delivery from the calendar pop-up help list (mandatory field, if leave blank system will assume today date as delivery date)
4) Select a warehouse from the pop-up help list (mandatory field)
5) Select a Despatch from the pop-up help list (mandatory field)
6) Enter reference number or anything to the Doc Ref field. (mandatory field)

The above fields are the minimum that is needed to create a new Sales Order. The rest of the fields are optional. Click "Save" button and a new Sales Order will be created as shown in Figure 6.1 with a message box saying "Sales order updated".

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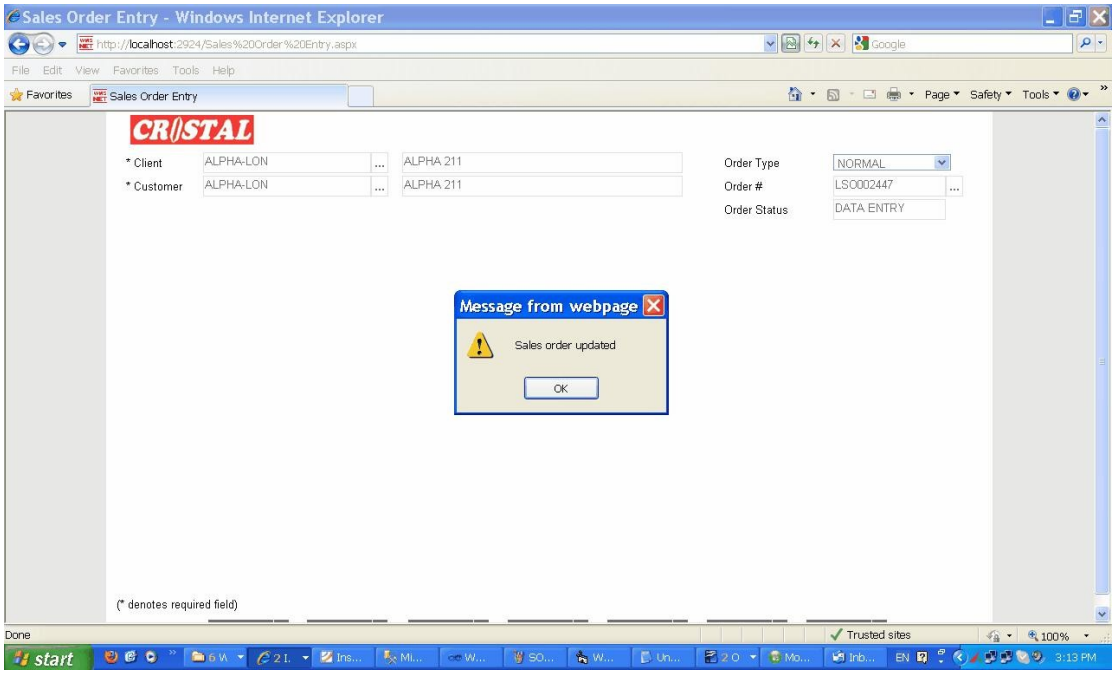

Figure 6.1

To view Sales Order details click on the "Order Details" tab as shown in Figure 6.2 (Arrow 1).

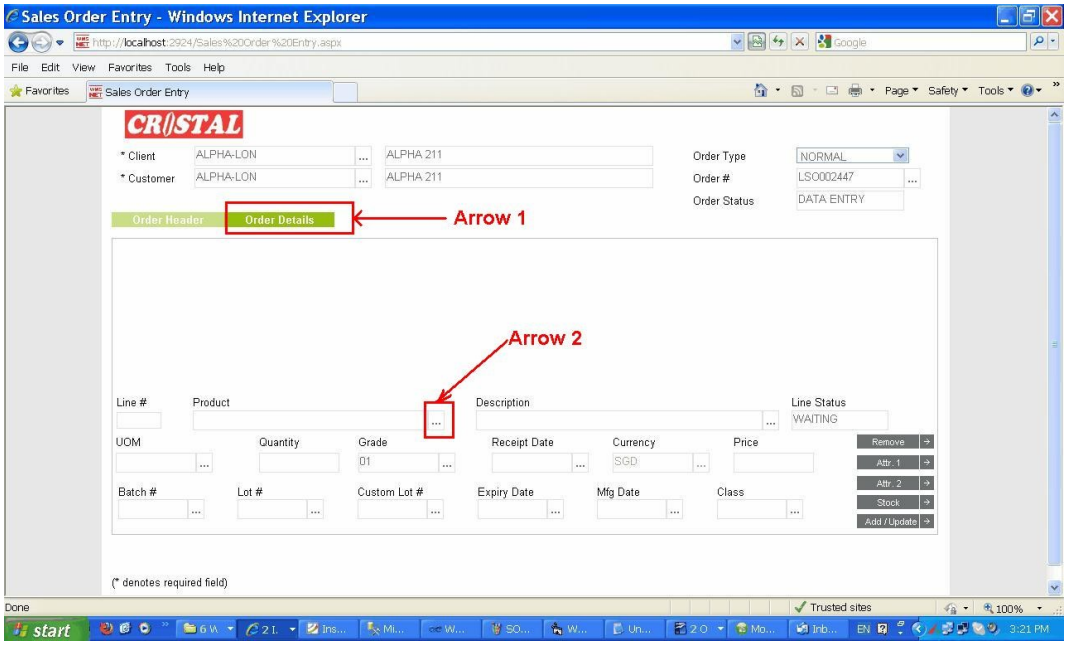

Figure 6.2

To add an item click on the "..." button next to the Product field in arrow 2 in Figure 6.2. A help list will pop-up to allow an item to be selected as shown in Figure 6.3.

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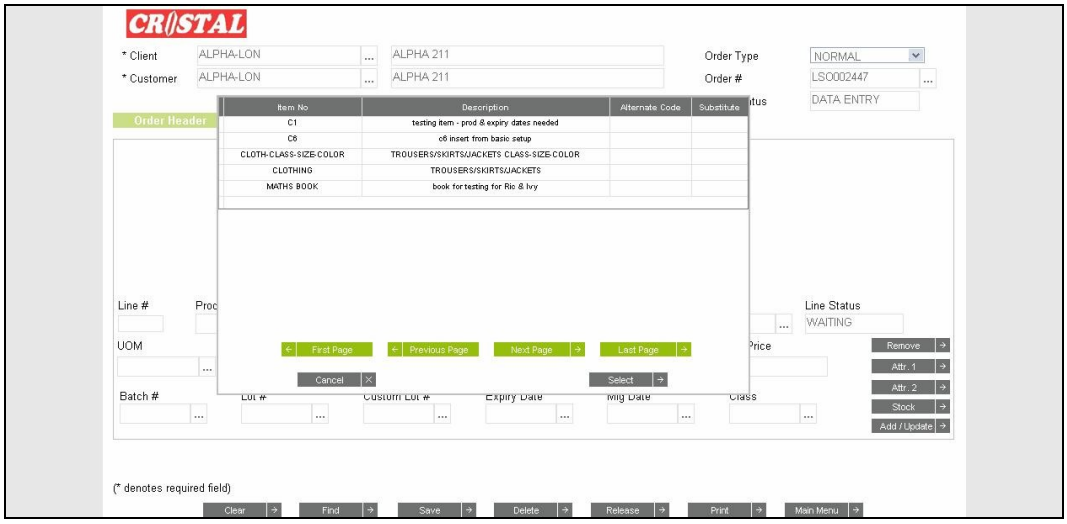

Figure 6.3

Once an item is selected and quantity is entered click on the "Add/Update" button. Then the record is added into the grid as shown in Figure 6.4.

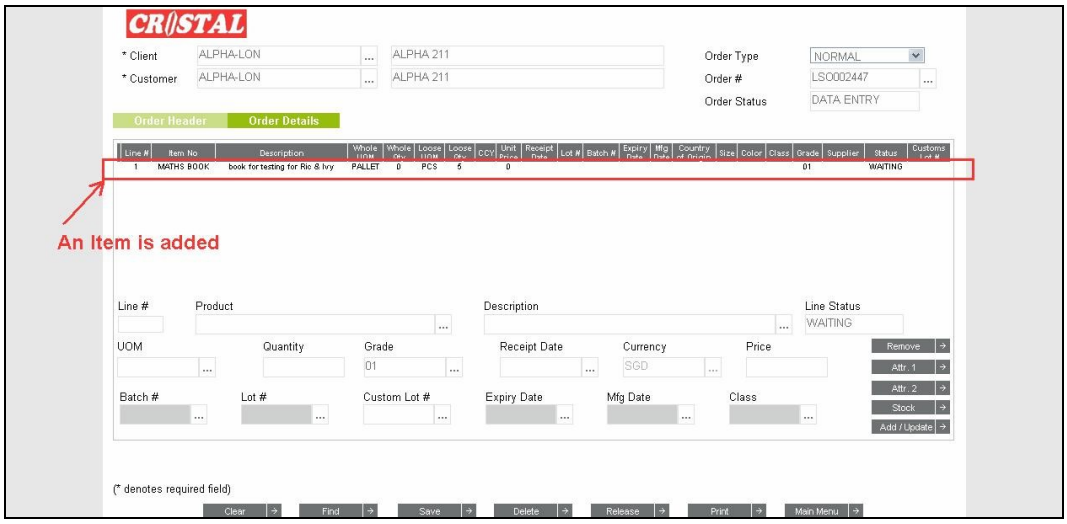

Figure 6.4

To amend a record that is added, click on the record and change the quantity or attributes accordingly, and then click on the "Add/Update" button as shown in Figure 6.5.

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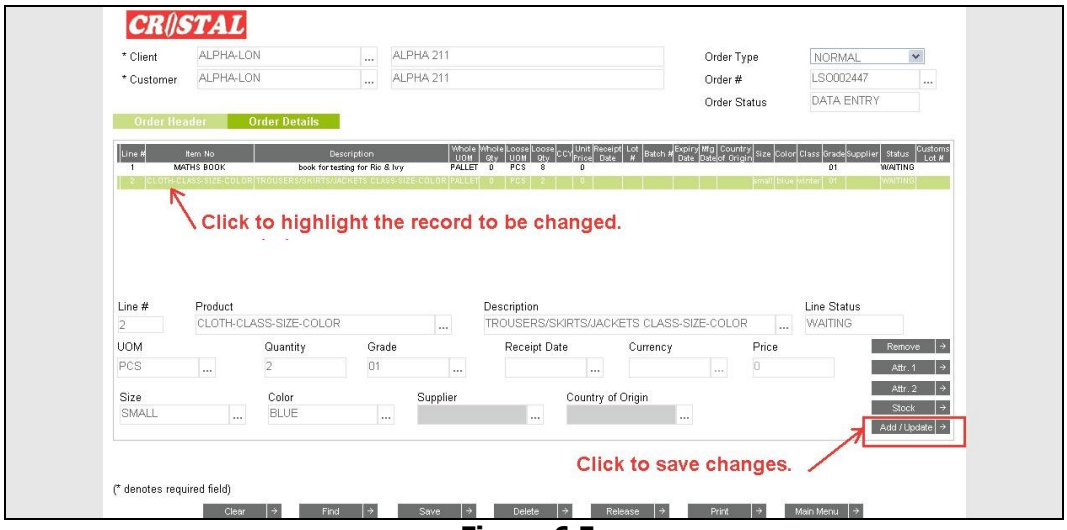

Figure 6.5

A message will pop-up saying that "SO Line Updated" as shown in Figure 6.6.

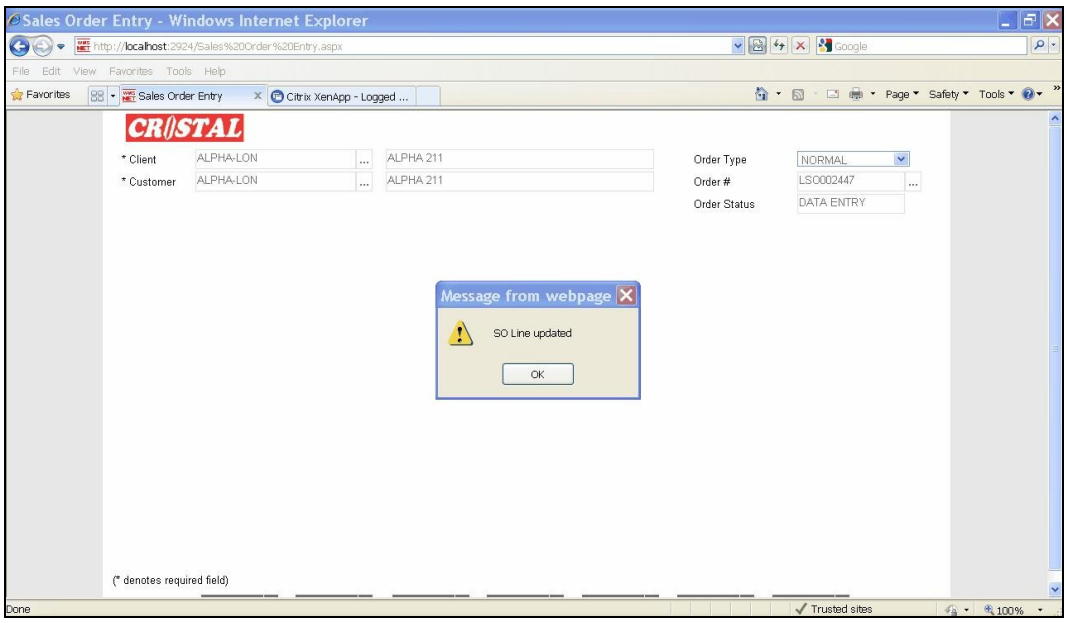

Figure 6.6

Click Ok and close it, and the Order Details data will be shown as in Figure 6.7. To continue to insert another item just follow the above steps.

To remove a record from the grid, just click on the record and click on the "Remove" button.

"Attr. 1" & "Attr. 2" buttons will display the item attributes like Grade, Color etc.

"Stock" button will display the item quantity On Hand, Free Quantity, Available Quantity, Booked Quantity etc.

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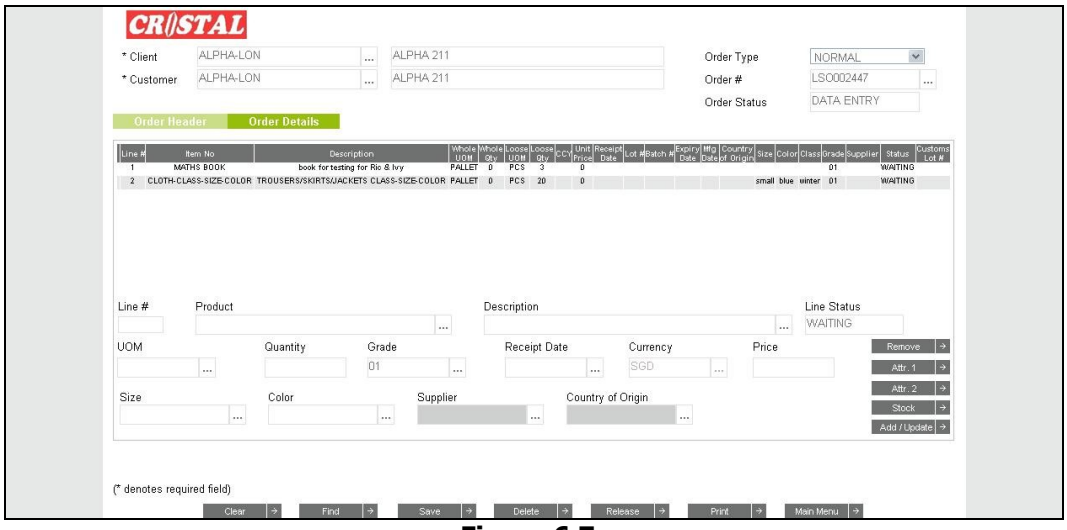

Figure 6.7

6.2. Release Sales Order

When a Sales Order (SO) is done, it is ready to be released to the warehouse for picking. To release a SO click on the "Release" button as shown in Figure 6.8. A message will be shown saying that "Sales Order released for picking" as shown in Figure 6.9.

Once it is released, the SO status will be changed from "DATA ENTRY" to "WAITING".

At the same time, SO sheet will also be printed out as shown in Figure 6.10.

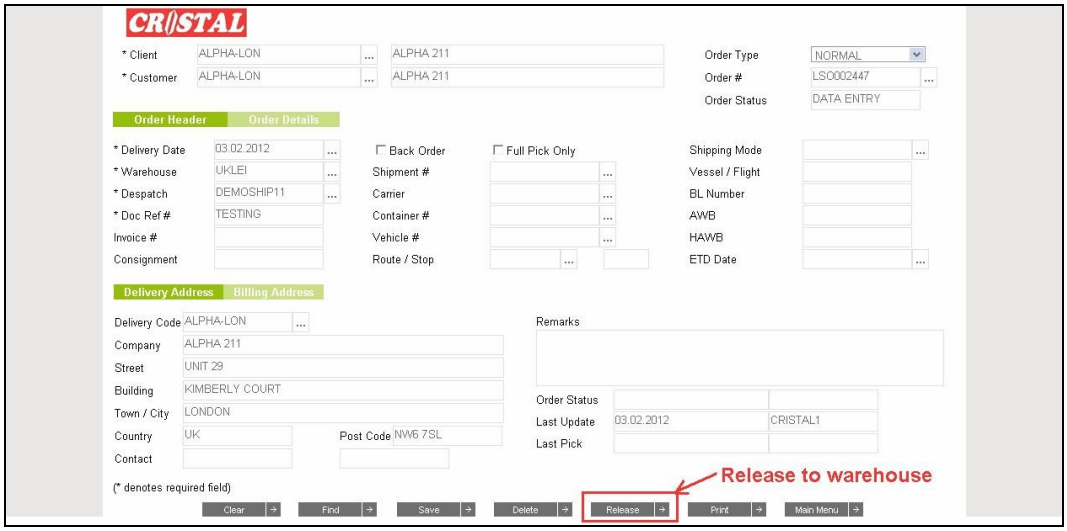

Figure 6.8

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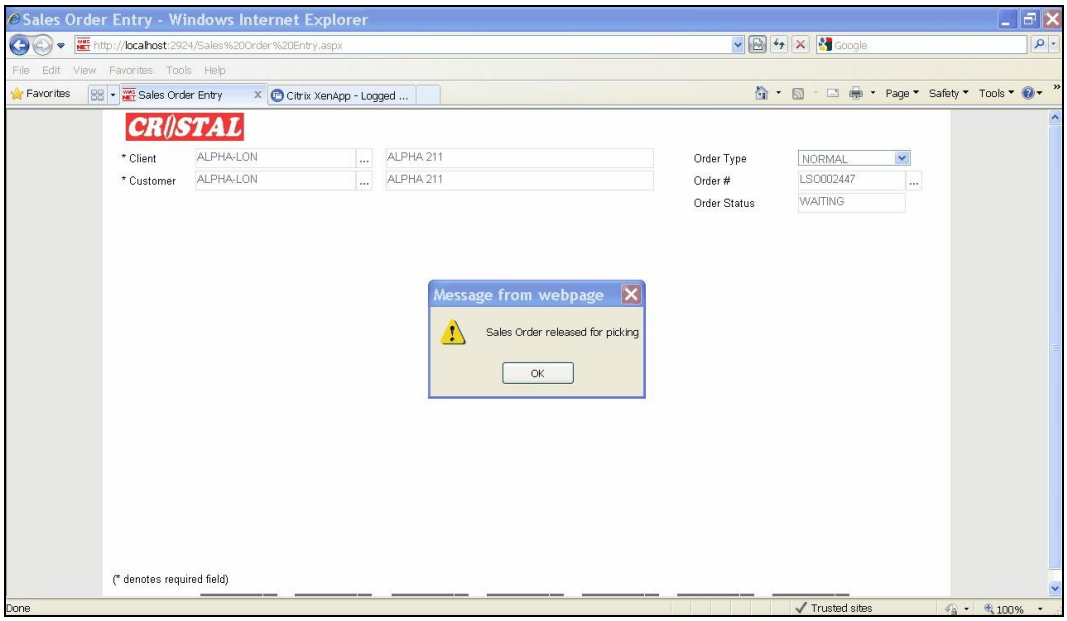

Figure 6.9

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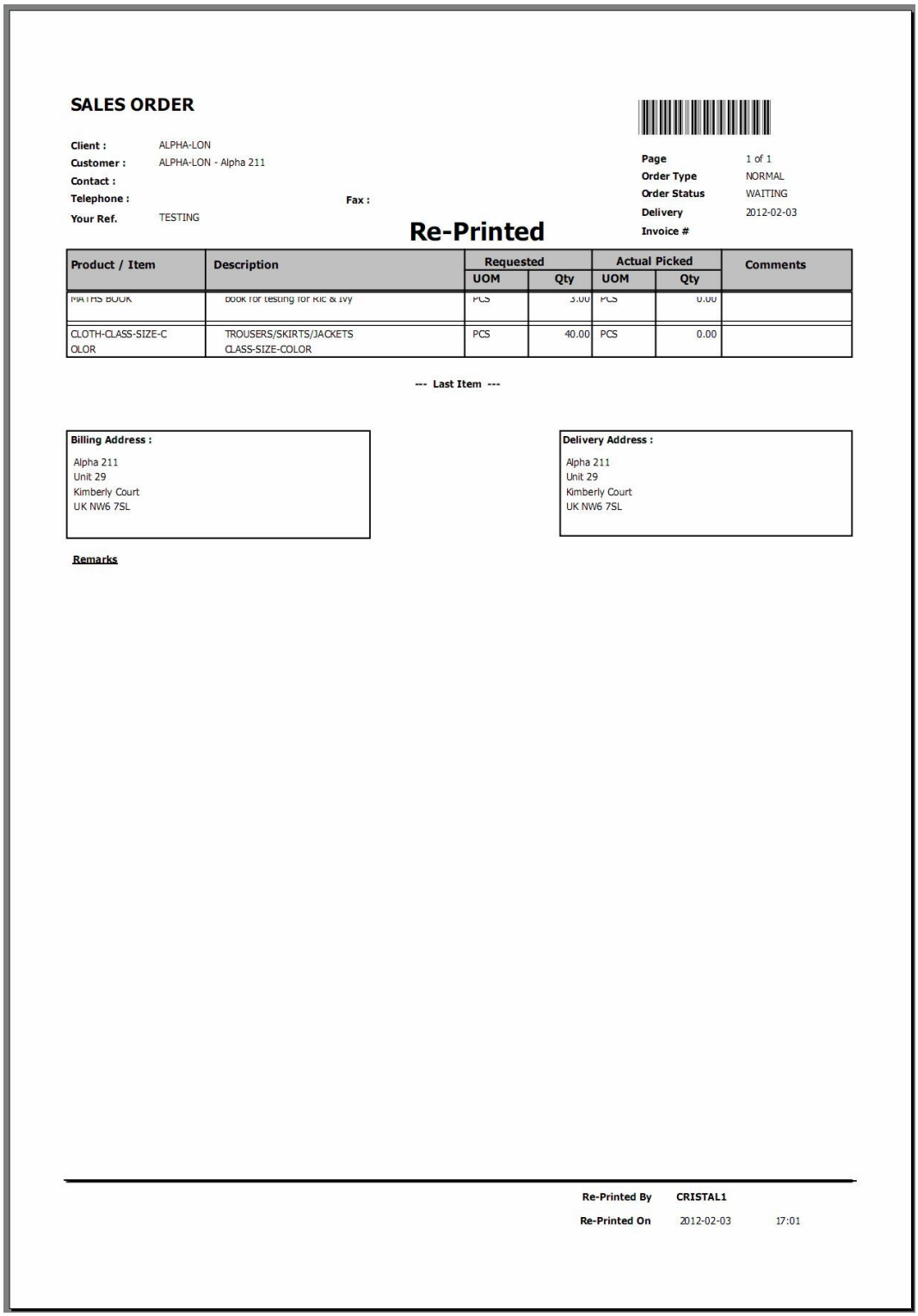

SALES ORDER

Client : ALPHA-LON
Customer : ALPHA-LON - Alpha 211
Contact :
Telephone : Fax :
Your Ref. TESTING

Page 1 of 1
Order Type NORMAL
Order Status WAITING
Delivery 2012-02-03
Invoice #

Re-Printed

Product / Item	Description	Requested		Actual Picked		Comments
		UOM	Qty	UOM	Qty	
MATHS BOOK	book for testing for Ric & Ivy	PCS	3.00	PCS	0.00	
CLOTH-CLASS-SIZE-COLOR	TROUSERS/SKIRTS/JACKETS CLASS-SIZE-COLOR	PCS	40.00	PCS	0.00	

--- Last Item ---

Billing Address :
Alpha 211
Unit 29
Kimberly Court
UK NW6 7SL

Delivery Address :
Alpha 211
Unit 29
Kimberly Court
UK NW6 7SL

Remarks

Re-Printed By CRISTAL1
Re-Printed On 2012-02-03 17:01

Figure 6.10

6.3. Print New Or Existing Sales Order

To print extra copy of a Sales Order sheet click on the "Print" button. A Sales Order sheet in PDF format will then be displayed to allow for print as shown in Figure 6.10.

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6.4. Delete New Or Existing Sales Order

To delete a new or existing Sales Order click on the "Delete" button after creating or retrievng it. A dialog box is displayed to confirm whether to delete the Sales Order as shown in Figure 6.11. If yes, the SO deleted will have the SO status changes from "WAITING" to "CANCELLED".

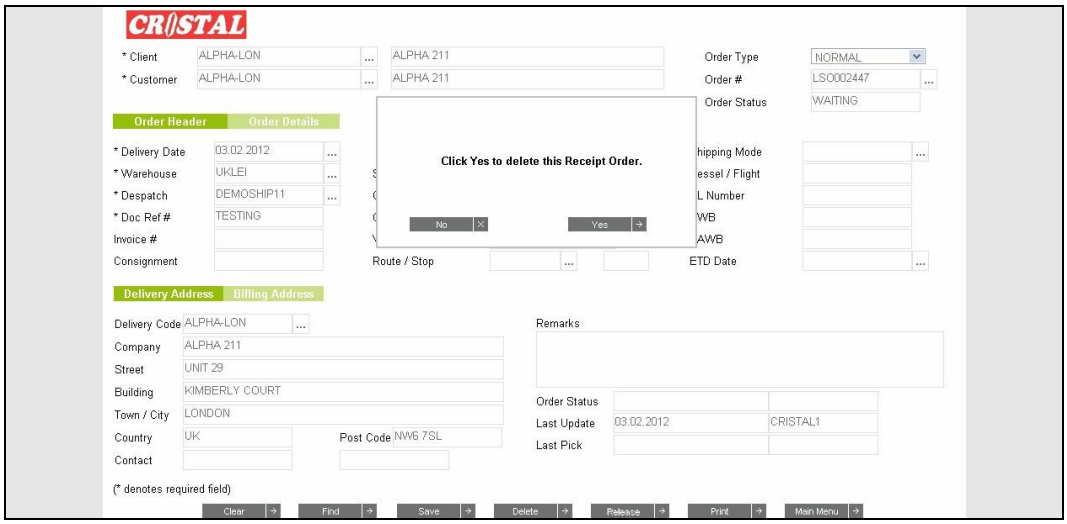

Figure 6.11

6.5. Existing Sales Order

To retrieve an existing Sales Order, do the following steps :

1) Select a client from the pop-up help list
2) Select a customer from the pop-up help list
3) Select an existing Sales Order number from the pop-up help list. Once a Sales Order number is selected, all data will be retrieved and displayed on the web page.

Repeat the steps shown above for Sales Order if you want to add new item, amend existing item, Release, Print etc.

Note : A Sales Order can be changed or not depends on the Sales Order (SO) status. Only SO status that are "DATA ENTRY" & "WAITING" can be changed or deleted. Others like "PICKING", "PICKED", "CLOSED" etc cannot be changed or deleted.

Only Size and Color attributes are mandatory even if an item is a controlled item of additional attributes.

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7. INTERNET EXPLORER SETTINGS

For best viewing of WMSNET in Internet Explorer and to prevent error while accessing, the following settings are needed:

7.1. Compatibility View

For Internet Explorer 8.0 and above, click on the Tools and enable "Compatibility View" by clicking on it as shown in Figure 7.0. If it is enabled, there is a checked besides it.

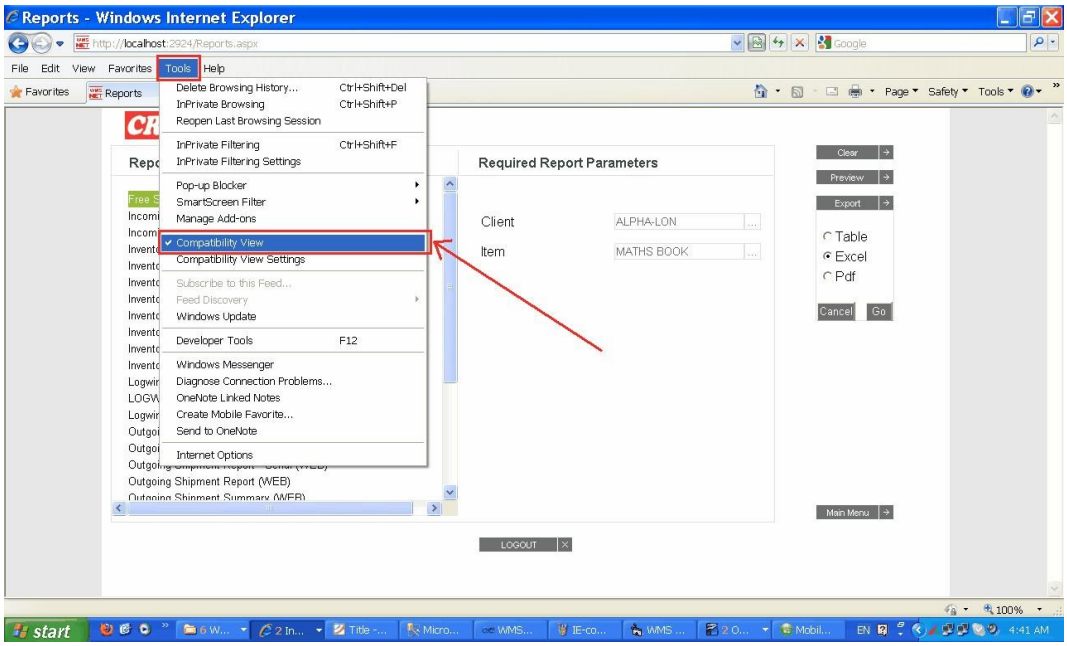

Figure 7.0

7.2. Trusted Site

Because WMSNET is using ActiveX controls for its webpage, some user might experience problem viewing the site if ActiveX is not allow to run. To allow ActiveX to run properly, the site therefore must be enabled as a trusted site.

To enable WMSNET as a trusted site, go to **Tools > Internet Options** and click on it as shown in Figure 7.1.

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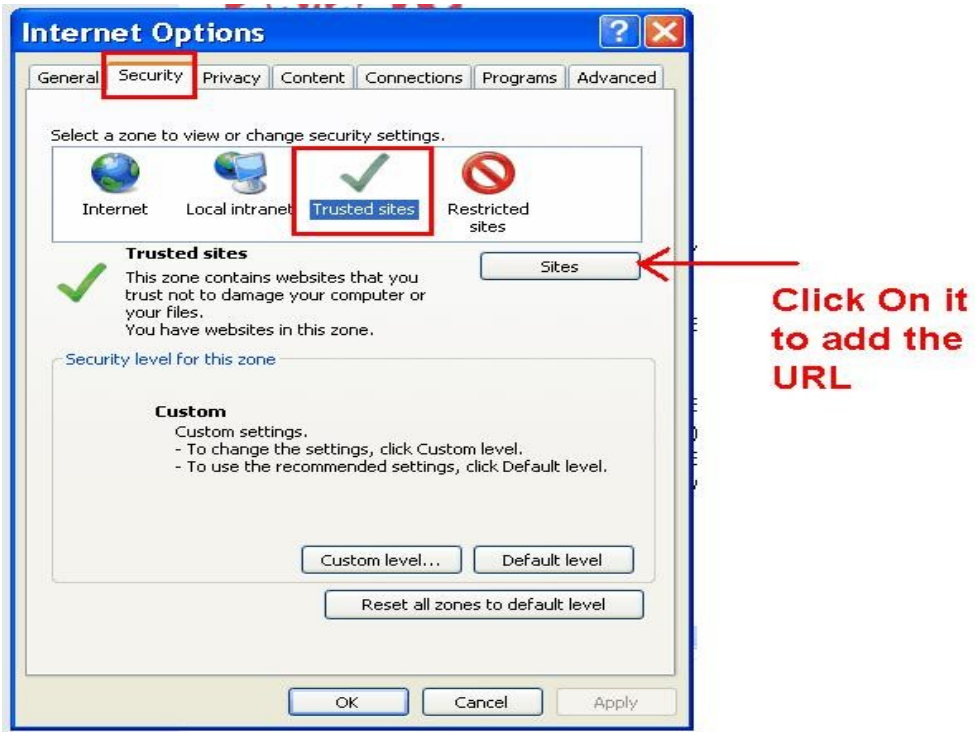

Figure 7.1

In Figure 7.1, click on the "Security" tab and select "Trusted Sites", and then click on the "Sites" button. A new dialog box is then shown as in Figure 7.2.

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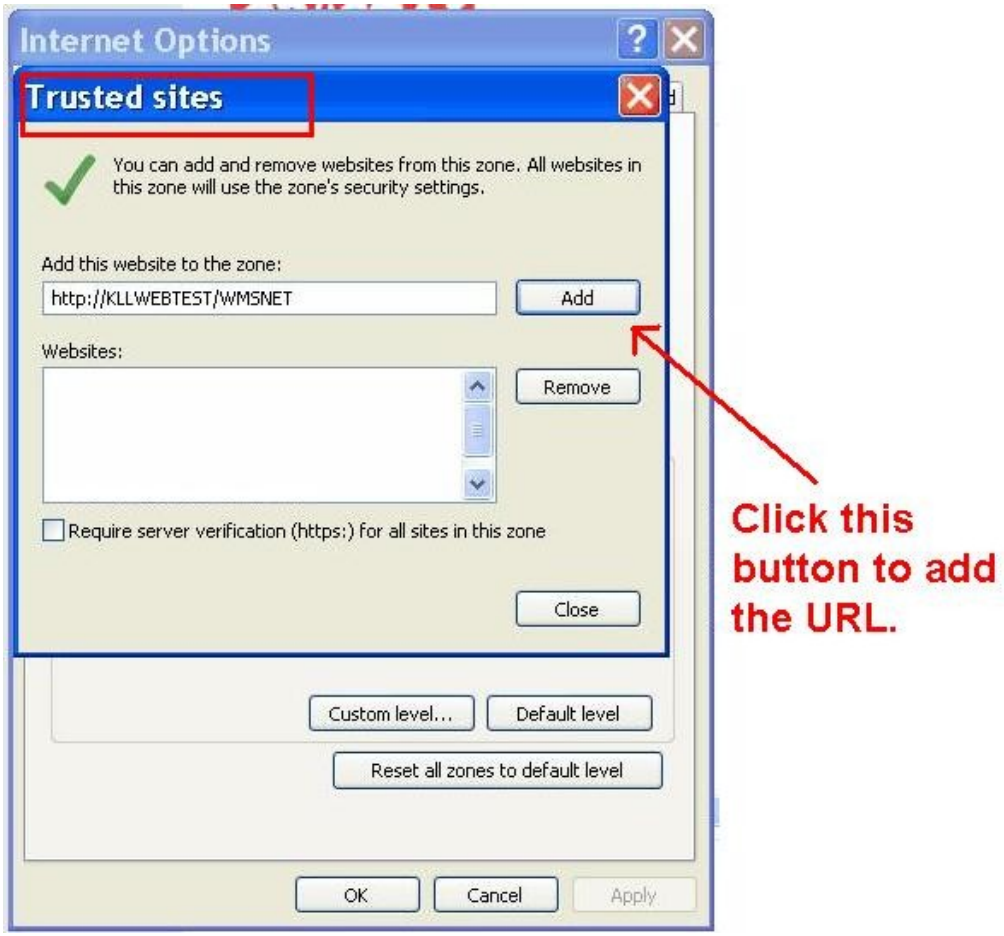

Figure 7.2

Click on the "Add" button to include the WMSNET URL as a trusted site. Thereafter, click on the "Close" button.

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