

We are currently updating our site; thank you for your patience.

INVENTORY

WAREHOUSES - ADD A WAREHOUSE

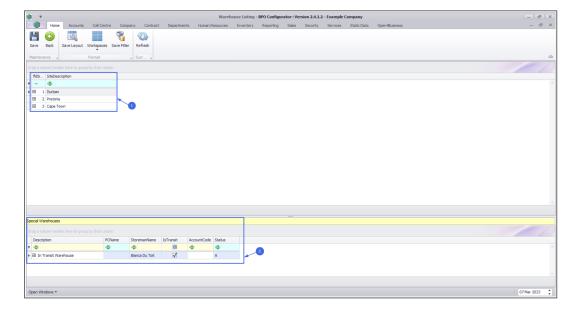
For a full breakdown of the types of warehouses and relevant configuration, please review the <u>Introduction to Warehouses</u> topic.

Ribbon Select Inventory > Warehouses

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The Inventory Warehouse Listing screen will be displayed.

Upon opening, this screen will display a list of **Sites** (that are linked to a Purchasing Centre) with a **Site Warehouses** sub grid (listing all the warehouses that you have user right access to) in the top frame, and **Special Warehouses** in the bottom frame (refer to the **System Warehouses - In-transit** topic).

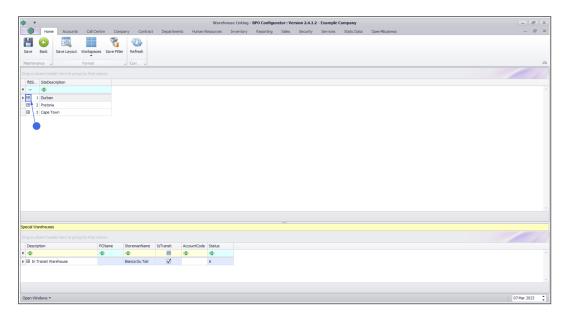


Help v2024.5.0.7/1.0 - Pg 1 - Printed: 21/08/2024



VIEW WAREHOUSES

- Click on the **expand button** in front of the **site** where you wish to **view** a **warehouse**.
 - In this example, **Durban** is selected.



The **Site Warehouses** sub grid will open, listing all warehouses in the selected site that you have user right access to.

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VIEW WAREHOUSE BINS

• Click on the **expand** button in front of the Warehouse where you wish to view or add the bin(s).

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- The Warehouse Bins sub grid will open and display all the Bin Locations within the selected warehouse.
- In this example, there are **4** bins set up in the selected warehouse.
 - DBNM A01
 - DBNM B01
 - DBNM C01
 - DBNM D01
- Note that there is <u>only one</u> Is Default check box marked as there must be <u>only one</u>, default bin location set up, per site, within a stock warehouse.



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• Collapse the Warehouse Bins sub grid and the Site Warehouses sub grid to return to the Sites data grid.

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ADD A WAREHOUSE

- Click on the **expand button** in front of the **site** where you wish to **view** a **warehouse**.
 - In this example, **Durban** is selected.



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The **Site Warehouses** sub grid will open, listing all warehouses in the selected site that you have user right access to.

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- **Right-click** anywhere in a **row** of the Site Warehouses frame.
- A Process menu will pop up.
- Click on Add Add New Warehouse.



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 The PC Name column will auto populate depending on the purchasing centre that the selected warehouse is linked to in <u>Com-</u> pany Purchasing Centre Configuration. The Status column will automatically be set to A - Active.

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• Description: Type in the Warehouse Name, e.g. In this example, CPT Customer Equipment Warehouse has been typed in.



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- Click in the Storeman Name text box.
- An **Ellipsis** button will be revealed.
- Click on this button to display the **Select an employee for a storeman** pop up screen.
- Click on the **row selector** in front of the **Employee** that you wish to **link** to this **warehouse**
- Click on **Ok**.

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- Select whether this will be a
 - Stock
 - Asset
 - Customer Asset
 - Auto Asset
 - Quarantineor
 - In-transit

site warehouse as explained in the <u>Introduction to</u> <u>Warehouses</u> topic.

- In this image, the **IsStock** check box has been marked which indicates that the new warehouse will be a **Stock Warehouse**.
- Account Code: Type in this text box the General Ledger account code where all these warehouse transactions should be posted to.

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- When you have finished adding the details to the **Site Warehouses frame**, click **outside** of the frame.
- You will notice a light grey expand button appear in front of the Warehouse **Description**.



• Click on the expand button to display the **Warehouse Bins** sub grid.

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Next: You can now follow the process to add a new bin location, as there must be at least **1** bin in each warehouse.

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