

Softera.WMS

Key Usage Scenario

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- Purchase Order 5
- Sales Order 11
- Transfer Order 12

Usage case


This setup will allow the user to create SWMS Activity documents for Purchase, Sales, and Transfer orders for a location without warehouse functionality. After entering data into single or multiple SWMS Activity documents and completing them, source documents will be updated.

Information about other cases and functionality is provided in the user manual or training sessions.

Warehouse Setup

Warehouse Setups contains a new section for Softera.WMS module. To use additional documents for entering or scanning item data in Sales Orders, Purchase Orders, and Transfer Orders user has to create and assign number series for shipment activity (Ship. Activity Nos. (SWMS)) and for receipt activity (Rec. Activity Nos. (SWMS))

Warehouse Setup

 PrintNode Info (SWMS)

General >

Numbering >

Whse. Setup (SWMS)

Warehouse Activities

Default Sorting Meth... ▾

Auto Print Put-Away (...)

Check Pick Lot Exp. D...

SWMS Activities

Ship. Activity Nos. (S... ▾

Rec. Activity Nos. (S... ▾

Inv. Activity Nos. (SW... ▾

Location Setup

The Location card has a new section for Softera.WMS module. To enable SWMS activity document creation for this location user has to enable the setting “Require Activity (SWMS)”

Location Card | Work Date: 2022-04-19



✓ Saved



BLUE · Blue Warehouse

- Zones
- Bins
- Inventory Posting Setup
- Warehouse Employees
- Online Map
- Dimensions
- ...

Address & Contact >

+44-(0)20 8207 4533

Warehouse >

No No No

Bins >

Bin Policies >

Never Check Capacity No

Whse. Setup (SWMS)

Warehouse Activities

Real Time Pick Info S...

Sort - Initial Sugg. Bi...

Pick/Put. by Whse. Cl...

No Direct Source Do...

Inventory Documents

Do Not Fill Phys. Invt...

Warehouse Worksheet

Activity Setup Time (...

Activity Src. Line Setu...

SWMS Activities

Require Activity (SW...

Auto Apply From RF ...

Allow New Sales Line...

Allow New Purchase ...






Allow New Transfer Li...

Allow New Phys. Inv. ...


Allow New Item Lines...


Purchase Order


After releasing the Purchase Order user can use the action “Create Activity (SWMS)” to create a single or multiple SWMS activity documents.


Purchase Order | Work Date: 2022-04-19   +  ✓ Saved  


106044 · NewCaSup


[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [Actions](#) ▾ | [Related](#) ▾ | [Fewer options](#) 


 Item Qty. Input Worksheet (SWMS)


 **Create Activity (SWMS)**


 Post... ▾



 Release ▾

 Create Whse. Receipt

 Create Inventory Put-away/Pick...



 Send Intercompany Purchase Order

 Archive Document

Lines | [Manage](#) | [Line](#) | [Functions](#) | [Order](#) | [Fewer options](#)  

| Type | No. | Variant Code | Item Reference No. | Gen. Prod. Posting Group | Description |
|--------|---------|--------------|--------------------|--------------------------|----------------|
| → Item | ⋮ 80216 | | | RETAIL | Ethernet Cable |
| Item | 80216-T | | | RETAIL | Ethernet Cable |

A specific user can be assigned to the document, Location Code and Shelf No. filters can be used to filter out specific lines of the order.

Create Reception Activity  

Options

Activity Count

Assign To User ID

Shelf No. Filter

Location Code

A list of SWMS documents that are related to the current order can be opened with the action “Activities (SWMS)”

Purchase Order | Work Date: 2022-04-19



✓ Saved



106044 · NewCaSup

Home Prepare Print/Send Request Approval Order Actions Related Fewer options

- Item Qty. Input Worksheet (SWMS)
- Create Activity (SWMS)
- Post...
- Release
- Create Whse. Receipt
- Create Inventory Put-away/Pick...
- Warehouse
- Activities (SWMS)

Lines Manage Line Functions Order Fewer options

SWMS Activity List | Work Date: 2022-04-19

Search + New Manage Open Source

| Type ↑ | Source Document Type | Source No. ▼ | No. ↑ | Location Code | Status | Creation Date-Time |
|-----------|----------------------|--------------|----------|---------------|--------|--------------------|
| Reception | Purchase Order | 106044 | SR000001 | BLUE | Open | 2023-03-10 15:54 |

The header section of this document shows information about the source document, and an action in the document line section “Item Qty. Input” allows the user to enter and register quantities for a specific line.



Reception · SR000001

Open Source Apply to Source Finish Cancel Reopen Archive

General

| | | | |
|----------------------|------------------|--------------------------|----------|
| Type | Reception | Source No. | 106044 |
| No. | SR000001 | Source Batch Name | |
| Location Code | BLUE | Source Detailed Entry... | |
| Status | Open | External Document No. | |
| Created by User ID | SOFTERA\ANDRAM | Expected Receipt Date | |
| Creation Date-Time | 2023-03-10 15:54 | Shipment Date | |
| Assigned User ID | | Destination Type | Vendor |
| Assignment Date-Time | | Destination No. | 01905382 |
| Posting Date | 2022-04-19 | Destination Name | NewCaSup |
| Source Document Type | Purchase Order | | |

Lines | Manage

New Line Delete Line **Item Qty. Input** Open Source

| | | | | |
|----------|---|-------|---------|-----|
| → 106044 | : | 10000 | 80216 | PCS |
| 106044 | | 20000 | 80216-T | PCS |

Edit - Activity Item Qty. Input



Register Quantity

General

| | |
|----------------------|----------------|
| Activity Type | Reception |
| Activity No. | SR000001 |
| Location Code | BLUE |
| Item No. | 80216 |
| Description | Ethernet Cable |
| Description 2 | |
| Variant Code | |
| Unit of Measure Code | PCS |

| | |
|-----------------------|--------|
| Tracking | |
| Lot No. | LOT001 |
| Expiration Date | |
| Serial No. | |
| Warranty Date | |
| Quantity | |
| Qty. to Handle | 15 |
| Qty. to Handle (Base) | 15 |

Detailed information about each registration is displayed in the “Detail Lines” section.



Reception · SR000001

Open Source
 Apply to Source
 Finish
 Cancel
 Reopen
 Archive

General >

| Lines | | Manage | | | |
|------------|---------------|-------------------------|----------------------------|----------------|-----------------------|
| Source No. | Description 2 | Initial Source Quantity | Initial Source Qty. (Base) | Qty. to Handle | Qty. to Handle (Base) |
| 106044 | | 15 | 15 | 14 | 14 |
| → 106044 | ⋮ | 5 | 5 | 6 | 6 |

Detail Lines

| Creation Date-Time | Created by User ID | Last Modification Date-Time | Initial Source Quantity | Initial Source Qty. (Base) | Qty. to Handle | Qty. to Hand (Bas |
|--------------------|--------------------|-----------------------------|-------------------------|----------------------------|----------------|-------------------|
| 2023-03-10 15:59 | SOFTERA\AN... | 2023-03-10 15:59 | 5 | 5 | 2 | |
| → 2023-03-10 16:00 | ⋮ SOFTERA\AN... | 2023-03-10 16:00 | 5 | 5 | 3 | |
| 2023-03-10 16:02 | SOFTERA\AN... | 2023-03-10 16:02 | 5 | 5 | 1 | |

Finishing the document with the action “Finish” will complete the entering data process, and “Apply to Source” will fill the field “Qty. to Receive” in the related source document.



Reception · SR000001

Open Source
 Apply to Source
 Finish
 Cancel
 Reopen
 Archive

General

| | | | |
|----------------------|------------------|--------------------------|----------|
| Type | Reception | Source No. | 106044 |
| No. | SR000001 | Source Batch Name | |
| Location Code | BLUE | Source Detailed Entry... | |
| Status | Open | External Document No. | |
| Created by User ID | SOFTERA\ANDRAM | Expected Receipt Date | |
| Creation Date-Time | 2023-03-10 15:54 | Shipment Date | |
| Assigned User ID | | Destination Type | Vendor |
| Assignment Date-Time | | Destination No. | 01905382 |
| Posting Date | 2022-04-19 | Destination Name | NewCaSup |
| Source Document Type | Purchase Order | | |

| Lines | | Manage | | | | | |
|------------|-----------------|---------------------------|-------------------|----------|--------------|----------------------|--------------------|
| Source No. | Source Line No. | Source Detailed Entry No. | Source Batch Name | Item No. | Variant Code | Unit of Measure Code | Qty. per Unit Meas |
| → 106044 | 10000 | | | 80216 | | PCS | |
| 106044 | 20000 | | | 80216-T | | PCS | |

Order lines contain additional fields that display quantities in Finished and Open SWMS Activity documents.

Purchase Order | Work Date: 2022-04-19



✓ Saved



106044 · NewCaSup

✕ An over-receipt quantity is recorded on purchase order 106044.

Home Prepare Print/Send Request Approval Order Actions ▾ Related ▾ Fewer options ⓘ

- Item Qty. Input Worksheet (SWMS)
- Release ▾
- Send Intercompany Purchase Order
- Create Activity (SWMS)
- Create Whse. Receipt
- Archive Document
- Post... ▾
- Create Inventory Put-away/Pick...

| Lines | | Manage | Line | Functions | Order | Fewer options | |
|--------|---------|----------------|---------------|-----------|-----------------|-------------------------------|---------------------------|
| Type | No. | Description | Location Code | Quantity | Qty. to Receive | Activity Finished Qty. (SWMS) | Activity Open Qty. (SWMS) |
| Item | 80216 | Ethernet Cable | BLUE | 15 | 14 | 14 | 0 |
| → Item | 80216-T | Ethernet Cable | BLUE | 6 | 6 | 6 | 0 |

Sales Order

After releasing Sales Order user can use the action “Create Activity (SWMS)” to create a Shipment Activity. Entering data and applying to the source document works the same way as in the Purchase Order; only that updated field is Qty. to Ship.

Sales Order | Work Date: 2022-04-19



✓ Saved



104001 · The Cannon Group PLC

Home Prepare Print/Send Request Approval Order Actions ▾ Related ▾ Fewer options ⓘ

- Create Activity (SWMS)
- Release ▾
- Create Inventory Put-away/Pick...
- Post... ▾
- Create Warehouse Shipment
- Archive Document

General Show more

Customer Name Due Date

Contact Requested Delivery D...

Transfer Order

After releasing the Transfer Order, user can create both the Shipment and Receipt activities if both locations have the activities option enabled. Lines contain fields to display Open and Finished for both Shipment and Receipt types.

Transfer Order | Work Date: 2022-04-19 ✎ 🔗 + 🗑️ ✓ Saved 📧 ↩

1010

[Home](#) | [Prepare](#) | [Print/Send](#) | [Order](#) | [More options](#) 🕒

📦 Create Shipment Activity (SWMS) 📦 Create Whse. Shipment 📦 Create Inventory Put-away/Pick...
📦 Create Reception Activity (SWMS) 📦 Release | ▾ 📦 Create Whse. Receipt
📦 Post... | ▾

General Show more

| | | | |
|--------------------|--------------------------|-----------------|---------------------------|
| Transfer-from Code | RED | In-Transit Code | OUT. LOG. |
| Transfer-to Code | BLUE | Posting Date | 2022-01-27 📅 |
| Direct Transfer | <input type="checkbox"/> | Status | Released |

| Lines | Manage | Functions | Line | Fewer options | | | | | |
|------------------------------------|--------------------------------|------------------------------------|--------------------------------|--|------------------------------------|--------------------------------|------------------------------------|--------------------------------|--|
| | | | | <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Shp. Activity Finished Qty. (SWMS)</th> <th style="width: 25%;">Shp. Activity Open Qty. (SWMS)</th> <th style="width: 25%;">Rec. Activity Finished Qty. (SWMS)</th> <th style="width: 25%;">Rec. Activity Open Qty. (SWMS)</th> </tr> </thead> </table> | Shp. Activity Finished Qty. (SWMS) | Shp. Activity Open Qty. (SWMS) | Rec. Activity Finished Qty. (SWMS) | Rec. Activity Open Qty. (SWMS) | |
| Shp. Activity Finished Qty. (SWMS) | Shp. Activity Open Qty. (SWMS) | Rec. Activity Finished Qty. (SWMS) | Rec. Activity Open Qty. (SWMS) | | | | | | |
| → 1896-S | ⋮ | | 2022-01-28 | <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> </tr> </table> | 0 | 0 | 0 | 0 | |
| 0 | 0 | 0 | 0 | | | | | | |
| 1936-S | | | 2022-01-28 | <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> </tr> </table> | 0 | 0 | 0 | 0 | |
| 0 | 0 | 0 | 0 | | | | | | |

SWMS Activity List | Work Date: 2022-04-19 📌 📧 ↩

🔍 Search ➕ New 📦 Manage 🔗 Open Source 🔗 🔍 ☰ 🕒

| Type ↑ | Source Document Type | Source No. ▼ | No. ↑ | Location Code | Status | Creation Date-Time |
|---------------------------|----------------------|--------------|----------|---------------|--------|--------------------|
| Shipment | Transfer Order | 1010 | SS000001 | REQ | Open | 2023-03-10 16:35 |
| Reception | Transfer Order | 1010 | SR000002 | BLUE | Open | 2023-03-10 16:35 |



Shipment · SS000001

- Open Source
- Apply to Source
- Finish
- Cancel
- Reopen
- Archive

General

| | | | |
|----------------------|------------------|--------------------------|----------------|
| Type | Shipment | Source No. | 1010 |
| No. | SS000001 | Source Batch Name | |
| Location Code | RED | Source Detailed Entry... | |
| Status | Open | External Document No. | |
| Created by User ID | ... | Expected Receipt Date | 2022-01-28 |
| Creation Date-Time | 2023-03-10 16:35 | Shipment Date | 2022-01-27 |
| Assigned User ID | | Destination Type | Location |
| Assignment Date-Time | | Destination No. | BLUE |
| Posting Date | 2022-01-27 | Destination Name | Blue Warehouse |
| Source Document Type | Transfer Order | | |

| Lines | | Manage | | | | | |
|------------|-----------------|---------------------------|-------------------|----------|--------------|----------------------|--------------------|
| Source No. | Source Line No. | Source Detailed Entry No. | Source Batch Name | Item No. | Variant Code | Unit of Measure Code | Qty. per Unit Meas |
| → 1010 | 10000 | | | 1896-S | | PCS | |
| 1010 | 20000 | | | 1936-S | | PCS | |
| 1010 | 30000 | | | 1896-S | | PCS | |
| 1010 | 40000 | | | 1936-S | | PCS | |