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MANAGER USER GUIDE

WAREHOUSE MANAGEMENT MODULE

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1. Introduction

The Aidmatrix Network® Warehouse Management Module is a web-based tool included in your disaster kit. This online application is used to manage warehouses that are set up for disaster response or ongoing relief. It uses best practices from the for-profit world for on-demand inventory control, while being tailored to fit the specific needs of the nonprofit world. System functionality is highlighted below:

Receive Goods, Log into Inventory, & Issue Receipts
This web-based tool allows administrators to simplify the processing tasks associated with warehousing in-kind donations. Items are logged into the system when they are received and receipts can be issued electronically saving time and money. Once the items are logged into inventory, they are immediately visible to users.

Ship Goods to another Location / Relief Agency
Use this system when you need to ship goods to another location or if goods need to be removed from inventory because of spoilage, damage or internal consumption. With the click of a button, you can also easily generate invoices to accompany the shipments.

Create "Relief Kits" from Existing Inventory
Use the Inventory Conversion feature to convert received units, such as 1 pallet of 100 blankets, into distribution units, such as 100 blankets. Take individual items and combine with other items to create a single "relief kit."

Maintain a Catalog of Goods for other nonprofits to "Shop"
As items are received they are classified into categories. Those categories are used to create a Catalog of Goods which can be easily published to the nonprofit community. The nonprofits can then "shop" from the catalog of available goods knowing with confidence that the items are in stock. You can search to find a specific item in inventory and add, delete and maintain the master list of all items in inventory at the warehouse. This greatly improves communication with the nonprofit community and helps ensure that quality donations are highly visible.

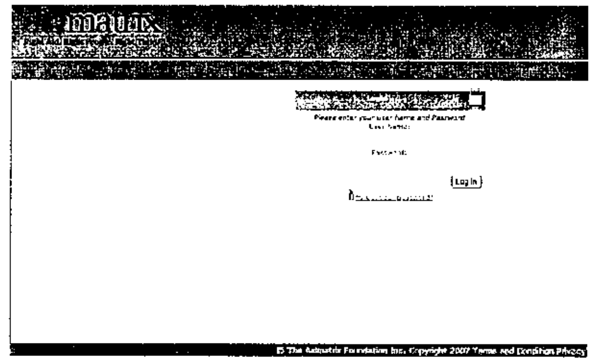
View Real-Time Inventory Levels
Maintain real-time inventory tracking and instantly share with others. Not only can you track the in-flow and out-flow of inventory at your main warehouse, but you can also view inventories across multiple warehouses. This single global view compiles the data for you, saving you precious time and energy.

Monitor Daily Shipment and Receipt Activities
Help better coordinate your transportation services and staffing by monitoring daily shipments and receipt activities. Optimize your plans based on data trends to make the best use of all your resources.

Run Reporting, Integration and Administration
Several key reports are included in the tool including: Current Inventory, Daily Activity and Transaction Summary. All reports can be exported to Microsoft Excel® for integration with other systems or for data sharing purposes. Administrators control access to reporting and menu visibility through user profiles to maintain the highest security standards.

2. Accessing the Site

To access this tool, open a web browser and enter the web address
<u>http://www.aidmatrixnetwork.org/warehouse</u> **Save this to your favorites.**



Enter your User Name and Password.
Click "Log In"

Write your User Name and Password here for your records:

User Name:

Password:

3. Defining Warehouse Terms

1. **<u>Receive</u>** – Products entering the warehouse inventory.
2. **<u>Ship</u>** – Products leaving the warehouse inventory.
3. **<u>Restricted</u>** – Products restricted by the donor or recipient organization. Restricted products require a manager code to be shipped.
4. **<u>Convert</u>** – Change the product category or UOM for a single product in inventory or a group of products in inventory.
5. **<u>Current Inventory</u>** - Report that displays the "real-time" inventory that is available in the warehouse.
6. **<u>Pick List</u>** – Feature on the "Current Inventory" report that allows warehouse manager to create a specific list of products to be exported and then printed.
7. **<u>Daily Report</u>** – Report that displays the beginning and ending balance of the available inventory on the selected date. Current Inventory is shown for comparison.
8. **<u>Transaction Summary</u>** – Report that displays all of the individual transactions.
9. **<u>Main Category</u>** – A high-level or "parent" category name used to filter the more descriptive sub categories.
10. **<u>Sub Category</u>** – A specific category name for products to be in inventory.
11. **<u>User</u>** – Login privilege level that enables all **Start**, **Reports,** and **Tools** menu capabilities. Cannot create new categories or access the **User Admin** menu.
12. **<u>Manager</u>** – Login privilege level with access to all warehouse features.
13. **<u>Guest</u>** – Login privilege level that limits the user to only the **Reports** features. Guest users cannot enter or edit information in the warehouse.
14. **<u>Shopper</u>** – Login privilege level that enables viewing the Shopper Report.

4. Managing the Warehouse

I. *Establishing Inventory Categories*

1. Select "Categories List" under the **Reports** menu
2. Select "Add Main Category" to add new main categories
   a. Enter the Main Category Code and Description
   b. Leave Category as "Active" or select "Inactive" if appropriate
   c. Select "Insert" to complete the addition of a new Main Category
   d. Continue this process until all Main Categories have been created
   e. Select "Return to Categories" to return to the Category Management page
3. Select a Main Category from the "Select Main Category" drop-down list
   a. The list will display the Sub Categories under the selected Main Category
   b. Select "Edit" to edit the Main Category
   c. Select "Add Sub Categories"
      i. Enter the Main Category Code and Description
      ii. Select "Insert" to complete the addition of a new Main Category
   d. Continue this process until all Sub Categories have been created
4. Select "Export to Excel" to export the entire Category List or a Main group

II. *Receiving Products*

1. Select "Receive" under the **Start** menu
2. Enter the Donation information
   a. Transaction Date: The date that the donation is received
   b. Main and Sub Category: Used to best classify the received donation
   c. Select Unit of Measure & Quantity (Can be changed using Conversion)
   d. Check "Restricted" if the donation is restricted
   e. Use the Comments box for any further information
3. Record the Donor and Driver information
4. Select "Receive More" if there are more donations from the same Donor & Driver
   a. The Donor & Driver information will populate into these donations
5. Finalize Donation when complete
6. View & Print the most recent transactions at the bottom of the page
   a. Select "Print" for the donations received to give a receipt to the driver

III. Shipping Products

1. Select "Ship" from the **Start** menu
2. Enter the information for the products to be shipped
    a. Transaction Date: The date that the product is shipped
    b. Main and Sub Category: Select for specific products being shipped
        i. Only categories for available products will appear
    c. Select Unit of Measure & Quantity
        i. Only UOM for available products will appear
        ii. Available quantity will display once the UOM is selected
    d. Check "Restricted" if the product was received as restricted
        i. A manager code is required for shipping restricted products
    e. Use the comments box for any further information
3. Enter the information for the Recipient Organization
4. Select "Ship More" to ship more than one product to the same organization
5. Select "Finalize Shipment" when the shipment is complete
6. View & Print the most recent transactions at the bottom of the page

IV. Converting Products

Purpose for UOM/Quantity Conversion

- Change UOM for one product - i.e.: Receive pallets and ship cases
- Many to one: Build a Kit of different products
- One to Many: Receive bag of assorted products and split products after sorted

Instructions

1. Select "Convert" from the **Start** menu
2. Enter the quantity of the product(s) to convert in the "Conversion Quantity" field for each product to be converted in the conversion
3. Select "Next" to move to the next step
4. Select Main and Sub Category(s) to convert the product(s) to
5. Select the UOM and enter the Quantity to convert the product(s) to
6. Select "Next" to move to the next step
7. Review the product conversion details and confirm by selecting "Finish"
    a. The top transactions displayed are to be changed FROM
    b. The bottom transactions displayed are to be changed TO
    c. Select "<<Back" to make changes to the product conversion
8. From the beginning you can edit the date and select "Go" to convert products in inventory on a date other than the present date

V. Search Inventory

1. Select "Search" from the **Start** Menu
2. Use Keyword Search to filter inventory
3. Sort each column by clicking on the header title
4. Select "Ship" button in the Shipped column to ship specific inventory
5. Select "Receive" to go to the Receive Products page
6. Select "View Transactions to view all of the transactions for a particular product

5. Reports

I. Current Inventory

1. Select "Current Inventory" from the **Reports** menu
2. Search inventory by Category – by Main only or by Main + Sub Category
    a. Click "Go" to start Search
3. Select "Export to Excel" at the bottom to pull your Inventory Report into Excel
4. Select "Clear" to remove the Search criteria
5. Create Pick List
    a. Check the box in the first column for each product you would like to pick
    b. Enter the quantity to be picked from inventory
    c. Select "Export Pick List" at the bottom to pull your pick list into Excel

II. Daily Report

The Daily Report is designed to display all of the activity from any given day. The report includes the inventory balances at the beginning and the end of the day to provide comparison. The present day inventory is displayed under "Current Inventory".

1. Select "Daily Report" from the **Reports** menu
2. The report defaults to include all Categories available on the selected day
    a. Un-check the "Include all Categories" box to show only the daily activity
3. Select a Date for the report and click "Update"
4. Export the Daily Report into an Excel spreadsheet

III. Transaction Summary

1. Select "Transaction Summary" from the **Reports** menu
2. Search Inventory by Category, ID, and/or Date
    a. Click "Go" to start search
3. Print Transactions for records or receipts
    a. Transactions entered together will print together
4. Edit certain information for each transaction
5. Export Transactions and Donor or Recipient Info
    a. "Export Donor Info" will pull all of the donor information entered into the system into an Excel spreadsheet
    b. "Export Recipient Info" will pull all of the recipient information

IV. Shopper Report

The "Shopper Report" is designed to give a simple real-time report to the non-profit recipients of the products in inventory (or other interested parties). This report removes the need to fax or email the inventory list to organizations. The shopper report is accessible by non-users of the system and can be password protected or not. Warehouse Managers have access to the report to export an Excel or PDF version to be saved or emailed.

1. Select "Shopper Report" from the **Shopper** menu
2. Select a format to be exported and click "Export"

6. Administrating the Warehouse

I. Create New User

1. Select "Create new User" from the **Admin** menu
2. Fill in all information for the new User
3. Save the password in a separate document
4. Select the appropriate Role for User
    a. For more information on User Roles, see Defining Warehouse Terms
5. Select "Create User"

II. List of Users

"List of Users" is designed to allow the Warehouse Manager to manage the existing users

1. Select "List of Users" from the **Admin** Menu
2. Select individual Users to see details
    a. The password is protected
3. Edit User information & change and update Roles
4. Export user information to Excel

III. Tools

A. Change Password

Enter your existing password and new password to complete the process. We recommend that you save your password on a hard and/or soft document for future reference.

B. Contact Us

Use the "Contact Us" feature to ask support questions and report your comments and/or problems. Your support ticket will be recorded and attended to in a timely manner