



BUILDING AND MANAGING WAREHOUSES WITH CARGOWISE

WHITE PAPER

WHITE PAPER PRESENTED BY
LOGIXBOARD

A training guide for freight forwarders to utilize CargoWise Warehouse's inventory management, automation, and customization features to provide the best experience for customers, while increasing their labor efficiency.



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Summary

Innovations in technology have brought the importance of automation and digital tools to the forefront of minds in the logistics industry. Warehousing operations house a large amount of data, offering a lot of opportunities for mistakes, but even more opportunities for the right digital tools and partners to add automation and heightened transparency.

The CargoWise Warehouse Module is an important part of the puzzle for freight forwarders that are looking to add accuracy, greater efficiency, and customer visibility into their warehousing processes to differentiate against their competitors. Using the Warehouse features will enable warehouses to get the most from their labor, maintain accurate inventory counts, and provide visibility to customers housing their goods there.

By leveraging the CargoWise Warehouse features, companies can use the setup criteria, Area and Location settings, RF scanning capabilities, printer auto-allocation, and more to improve the overall workflow within their warehouses.

Setting Up Warehouses

Creating warehouses on CargoWise allows for in-depth customization to create a system for users that matches their operation's exact needs and specifications. Taking the needed time to set up all tab settings will ensure that automation features, efficiency tools, and the future setup of storage locations and products within the warehouse is straightforward for users. Warehouses and container yards can be set up by going to **Maintain**, selecting **Warehouse**, selecting **Warehouse** again, and clicking the **New** button to open the creation window.

ENTRY TAB SETTINGS

Beneath the **Entry** tab, enter the **Details**, **Warehouse Type**, **Dangerous Goods**, and **Areas** section information.

In the **Details** section, users will fill out the following identification information to establish the basic functionality of their warehouse or container yard in CargoWise. The mandatory **Code** field (allows a maximum of three characters) should be filled with the numeric code of the facility being set up as a warehouse. The **Warehouse is Active** field indicates whether the warehouse is active or not. Having this field enables users to deactivate warehouses (preventing new receipts or orders), while still maintaining reporting and viewing of historical information within the warehouse. Product warehouses cannot be marked as inactive unless there is no stock within them. After entering the **Name** of the facility, users will fill out the **Branch**, **Address**, and **Country** fields to complete the Details section. A warehouse branch can only belong to one of each warehouse type, besides virtual warehouses since they do not occupy physical warehouses. If creating a Virtual Warehouse (4PL), instead of entering the organization/branch/organization proxy code for the Address, enter the organization code of the warehouse you are outsourcing to.

The screenshot displays the 'Entry' tab for creating a warehouse. It is divided into several sections:

- Details:** Includes fields for Code, Name (with a language dropdown set to 'ENG'), Branch (with a '(None Selected)' dropdown), Address (with a note '* NO ORGANIZATION IS SELECTED'), and Country.
- Warehouse Type:** Features a 'Warehouse Type' dropdown set to 'Product Warehouse' and a 'Virtual Warehouse' checkbox. Below this, there are 'Transactions' options for 'Free Store', 'Bond', and 'Custom', each with a note 'Not enabled for [type]'. The 'Free Store' option is currently selected.
- Dangerous Goods Contact Details:** Contains fields for 'DG Contact', 'Phone Type', and 'DG Number'.
- Areas:** A table with columns 'Area' and 'Type'. It shows one entry: 'DEFAULT' with type 'FREE'. There are 'New' and 'Edit' buttons at the bottom of this section.

At the bottom of the form, there are three buttons: 'Save', 'Save & Close', and 'Cancel'.

In the **Warehouse Type** section, users will select the warehouse type desired for their new warehouse from the dropdown menu.

- **PRW - Product Warehouse**
For warehouses managing products (SKU'S) received, stored, and dispatched (including Free Store, Excise, and Customs Bonded warehouses).
- **TRW - Transit Warehouse**
For warehouses managing freight received, stored, and dispatched to different locations domestically or internationally. This type uses an integration with the Forwarding module for tracking/tracing packages through each depot (CFS).

“Container Freight Station (CFS) refers to a warehouse where cargo that belongs to various exporters or importers is consolidated or de-consolidated before being exported/imported.”

- **FTZ - Product Warehouse (FTZ)**
Free Trade Zone (FTZ) warehouses are **specialized warehouses in the US**. Used to store products without formal customs entry procedures. This is different from a bonded warehouse.



Free Trade Zone (FTZ) warehouses are facilities in areas that the U.S. government classifies as being outside of U.S. customs territory, despite being within the United States borders. FTZs are generally located near Customs and Border Protection ports of entry. In contrast to bonded warehouses, which are Customs-controlled, FTZ warehouses operate under differing rules.

- **CYD - Container Yards**
For use with CargoWise's container yard module to enable users to manage comprehensive functions associated with a container yard.

Users will tick the Virtual Warehouse box if they don't physically own a facility. Their warehousing operation may be outsourced to another facility while still managing all transactions/records of received, stored, and dispatched products, or for bonded warehouses not owned by the user but used with the Customs module for reporting and accounting of Customs entries.



The Transactions Field is used for Product warehouses to indicate what types of transactions are handled at the warehouse.

- **Free Store: No restrictions, can store any product.**
- **Bonded: Using the Customs Bonded integration.**
- **Excise: For products that incur excise duty (AU only).**

In the **Dangerous Goods** section, users will enter the designated contact's information (the contact must be listed in the organization record) including name, phone number type, and phone number.

In the Areas section, the CargoWise system will display the **DEFAULT** area with the type **FRE** (Free Store). A **DEFAULT DOCK DOOR** area with the type DDA (Dock Door) will automatically be created when the new warehouse is saved because it's mandatory to have Locations for the storage of products/packages and a dock doors area assigned to create a warehouse on the module. Area names can be changed using the **Edit** button to create more descriptive or coded area names.



Warehouse Area Types are based on the type of Warehouse created.

- **Bonded Area (Customs Warehouse Module): Customs transaction entry numbers are needed for any receipt or order created in a Bonded Area.**
- **Dock Door (All Warehouse Modules): Dock Door Areas are used when unloading products into a Warehouse.**
- **Excise Area (Customs Warehouse Module): Customs transaction entry numbers are needed for any receipt or order created in an Excise Area (for products that incur excise duty in AU only).**
- **Free Store Area (All Warehouse Modules): Free Store Areas house general storage of products.**

Warehouse Set-Up Criteria

The **Parameters** tab on the creation window of a warehouse enables default values and configurations to be set per the warehouse. Varying Warehouse types display different configuration options, but all facilities have the same **Location Configuration** options and **Default Location Type** set up required.

Location Configuration fields determine how locations will look on documents, labels, and screens through the **Location Component Delimiter**, **Display Leading Zeros**, the **Input and Display Columns, Levels and Trays as A-Z**, and the **Input and Display Columns, Levels, or Trays Starting at Position 0** sections. These allow users to decide the character that will appear between letters and/or numbers of locations when printing, to display a zero in front of a number in the location, display columns as letters rather than numbers and start the counting of all locations (columns, levels, and/or trays) at zero.

The screenshot displays the 'Parameters' tab for a warehouse configuration. The interface is divided into several sections:

- Location Configuration:**
 - Location Component Delimiter:
 - Display Leading Zeros:
 - Input and Display Columns as A-Z:
 - Input and Display Columns starting at Position 0:
 - Input and Display Levels as A-Z:
 - Input and Display Levels starting at Position 0:
 - Input and Display Trays as A-Z:
 - Input and Display Trays starting at Position 0:
- Default Location Type:**
 - Options: (Open Floor)
- Finalized Date Override:**
 - Use Arrival Date For Receipt Finalized Date:
 - Use Required Date For Outwards Finalized Date:
- Verify Empty Locations:**
 - Enable Verify Empty Location Status:
- Pick by UOM:**
 - Enable Pick by UOM type:
- RF:**
 - Use Scan All mode by default on RF:
- Cycle Count:**
 - Number of Cycle Count Locations to Auto Assign:
- Auto Print Configuration:**
 - Automatically Print Picking Slips:
 - Automatically Print Picking Shortfall Items:
 - Automatically Print Picking Non Picked Items:
 - Automatically Print Order Summary on Pick:
 - Automatically Print Order Copy for WOP's on Pick:
 - Automatically Print Packing Slips:
- ABC Analysis:**
 - Include Warehouse in ABC Analysis:
- Package IDs:**
 - Always use Warehouse GG1 prefix when no client prefix is specified:
- RF Pick and Pack Warehouse Printer:**
 - Printer selection dropdown: [...]
- Dock Door:**
 - Default Inbound Dock Door Location:
 - Default Outbound Dock Door Location:
- Relieving:**
 - Prevent Release of Package if not picked:

At the bottom right, there are buttons for **Save**, **Save & Close**, and **Cancel**.

Product Warehouse

Including Product Warehouses and Free Trade Zone warehouses, the Product Warehouse type is the most common type of warehouse (and most commonly used on CargoWise).

Setting up a Product Warehouse parameters tab includes filling out the following criteria.

- **Finalized Date Override section**

The process of finalizing a receipt or order indicates to the system that the job is complete in a Product Warehouse. This section determines whether the system will use the arrival date on a receipt (or not) as the start date for charging storage for products and whether the system will use the required or finalized date on an order to stop charging storage for products.

Note: It's recommended users leave the **Use Required Date for Outwards Finalized Date** box unticked because the required by date on an order may be before the date the goods are finalized.

- **Verify Empty Locations section**

When users enable **Verify Empty Locations**, warehouse pickers must verify that a location is empty when the system has determined there is no more inventory at the location. This setting can help assure greater inventory accuracy.

- **Pick by UOM section**

When users enable **Pick up UOM type**, warehouse pickers can pick packages according to the unit of measure.

- **RF section**

When selecting **Use Scan All mode by default on RF**, the RF devices use the Scan All mode rather than the system default of Scan Qty. The Scan All mode will default across all relevant screens on the RF devices (e.g. Unloading, Picking, Auditing Packages, etc.).

- **Cycle Count**

Entering numbers into the **Number of Cycle Count Locations to Auto Assign** field decides the number of cycle counts to assign to a user when using Cycle Counting.



Cycle counting is an alternative method for counting inventory/stock that is performed by counting a small portion of the warehouse's inventory every week or day.

- **Auto Print Configuration section**

This section allows users to set whether documents should automatically print during the process of creating orders, picking, and releasing the product with the multitude of selection options listed below. These documents can also be printed manually from the picking or release screens.

- Automatically Print Picking Slips
- Automatically Print Picking Shortfalls Items
- Automatically Print Picking Non Picked Items
- Automatically Print Order Summary on Pick
- Automatically Print Order Copy for MOP's (Multi Order Pick) on Pick
- Automatically Print Packing Slip
- Include Warehouse in ABC Analysis
- Always use Warehouse GS1 prefix

Note: It's recommended users leave the **Use Required Date for Outwards Finalized Date** box unticked because the required by date on an order may be before the date the goods are finalized.

- **RF Pick and Pack Warehouse Printer section**

This section determines the label printer for the warehouse. The module logic will first check to see if there is a specific printer based on the RF Device being used by the worker, then if there is a specific printer based on the Area, and then if neither of these has been specified then it will use this warehouse level printer selection.

- **Dock Door section**

The Default Inbound Dock Door Location determines an inbound dock door location that populates as the default Dock Door on received product lines.

- **Releasing**

Selecting the **Prevent Release of Package if not picked** ensures inventory must be picked into packages before being released.

Specific to the Product Warehouses, the Working Hours tab is used to outline when the warehouse will have workers actively working (including weekends if applicable). This is vital to accurate key performance indicators (KPIs) used to evaluate the productivity, efficiency, and more about the warehouse.

Transit Warehouse

Transit Warehouses store goods temporarily and are only set up to receive and quickly dispatch them. The CargoWise Warehouse module provides specific features for this warehouse-type and setup features to get the most from their software.



Setting up a Transit Warehouse parameters tab includes filling out the following criteria.

- **Security section**
When selected, the **Security Processing Required**, established rules for air freight security are enforced.
- **Loading section**
When deselected, the **Allow DCN to be split across Load Lists** prevents packages from being split across multiple load lists, ensuring all packages from one DCN are sent together.
- **Dock Door section**
When **Default Inbound Dock Door Location** is selected, devices won't ask users to scan the dock door location on receipt of the cargo.

- **Cycle Count section**
Entering numbers into the **Number of Cycle Count Locations to Auto Assign** field decides the number of cycle counts to assign to a user when using Cycle Counting.
- **Customs section**
When **Customs Controlled** is selected, a CEN (Customs Entry Number) and CRN (Customs Release Number) are required to release/dispatch cargo from the warehouse.
- **Port Authority Controlled**
When **Port Authority Controlled** is selected, a PAN (Port Authority Number) is required to release/dispatch cargo from the warehouse.
- **UNDG Thresholds section**
In this section, enter dangerous goods information to warn users when limits are approaching maximum capacity.

When creating Container Yard parameters, the general **Location Configuration** section is used in the **Parameters** tab to set it up.

Warehouse Area Settings

After creating your Warehouse, users will then set up Areas in the Warehouse that divide, name, and identify the purpose and processes that will occur in that location of the building. By default, your Warehouse will be given a Default Area and prompted to create your first Default Dock Door Area. Each Area added will be assigned a location in the warehouse, a name, and the type of Area to describe the activities that will be performed there.

Warehouse Area Types are based on the type of Warehouse created.

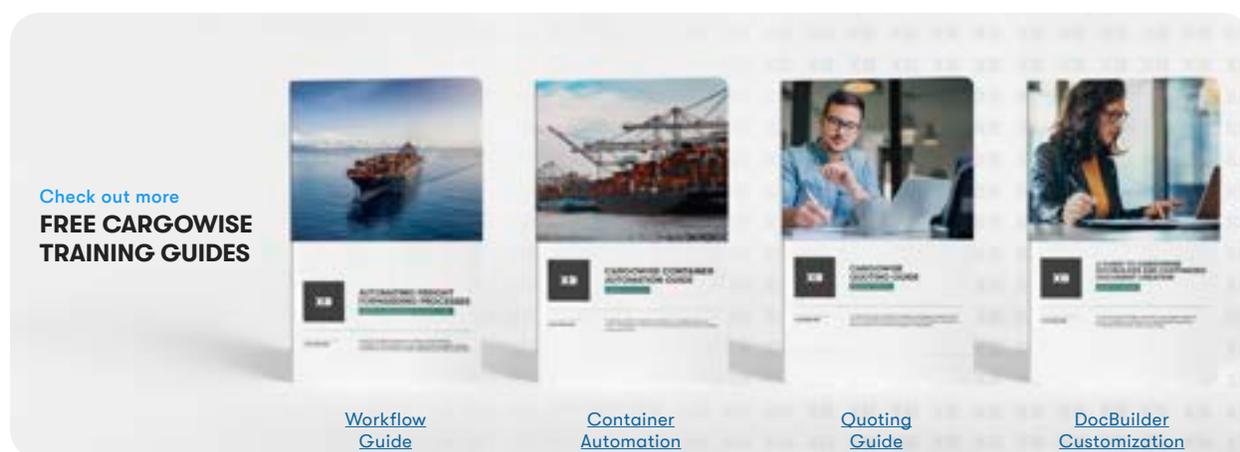
- **Bonded Area** (Customs Warehouse module): Customs transaction entry numbers are needed for any receipt or order created in a Bonded Area.
- **Dock Door** (All Warehouse modules): Dock Door Areas are used when unloading products into a Warehouse.
- **Excise Area** (Customs Warehouse module): Customs transaction entry numbers are needed for any receipt or order created in an Excise Area (for products that incur excise duty in AU only).
- **Free Store Area** (All Warehouse modules): Free Store Areas house general storage of products.

Putaway rules to store products by client, product, hazardous/dangerous goods, and more can be created based on Area. Users can also use Areas to create putaway rules to put damaged packages in a specific location to ensure a secure, standardized location for efficient management and accounting. To create an Area, users will navigate to **Maintain, Warehouse**, and then **Areas**.

In the Details section of the Area window, users will fill out the following information to set up the Areas for their new or existing warehouse location.

- **Warehouse**
- **Area Name**
- **Pick Area**
- **Putaway Area**
- **Default Pick Area & Def. Put Area**
- **RF Pick Pack Printer**

Areas can be assigned printers for easy access, to increase efficiency, or decrease backup at one printing area. CargoWise Warehouse will also tell users how much volume and the weight capacity is left in an area based on defined dimensions and product dimensions of active inventory, adding more automation to inventory visibility processes for warehouse workers.



FAQ

- **Does the Warehouse module support FIFO and other types of inventory/picking rules?**
Yes, Inventory Allocation Rules can be configured to control how the inventory is allocated to picks, in order to meet complex picking strategies.
- **If my warehouse receives a carton of goods (i.e. box of pens), can I receive just the carton or do I need to scan all individual units?**
By setting up Unit Conversions on the Product file, you can receive just the carton and the system will know how many units (pens) were received.
- **Can a tie a serial number, expiration date, PO number, or other reference numbers to individual products?**
Yes, product attributes can be set up against the customer's organization > warehouse tab.
- **Can the warehouse module support my 'pick & pack' operations?**
Yes! The warehouse can be configured to optimize small parcel pick and pack with trolleys, picking sequences (i.e. serpentine), and carton optimization.