



# Warehouse inventory 1.3

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**Applicable documents und sources**

in the respective valid versions

[1] the application's online help

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# 1 Warehouse inventory

The Warehouse inventory module allows you to carry out the operations necessary for warehouse storage.

You can execute the following operations in warehouse inventory.

- Receipts of goods (acceptance)
- Reservations
- Removal of goods (exit)
- Cancellations
- Assessments (article or inventory on the key date)

Storage areas may be entered as master data. Individual layouts are used for printing the receipt- or retrieval documents.



**Tip:** If you would like to use your own printing layouts, please contact [servicedesk@dakosy.de](mailto:servicedesk@dakosy.de).

## 1.1 Create incoming goods

This section describes how to create incoming goods for the warehouse inventory.

1. Select the menu entry **Start > Warehouse inventory**.
2. Select the menu entry **Goods Ingoings** in the area **Overviews**.  
This opens the overview **Goods Ingoings**.
3. In the area **Related actions**, select the menu entry **new Goods Ingoing**.  
The window **create ingoing** opens.
4. Fill out at least the mandatory fields.

Field	Description
<b>Incoming Reference</b>	Reference number of the delivery
<b>Position</b>	Position for the reference number delivery When creating incoming goods, the position number for the reference number is issued automatically. It can be changed.
<b>Owner of goods</b>	Owner of the commodities
<b>storage facility</b>	Address where the warehouse is located. The storage facility may be stored in the master data <b>Customer/Addresses</b> .
<b>storage area</b>	Description of the warehouse at the storage facility. Storage space may be stored as master data.
<b>Article Code</b>	Code under which the article data was saved in the master article. You can enter or search for an article to include in the customs declaration. To enter an article for the master article, right click in the field with the mouse and select the menu item <b>Creates a new article with current customs position data</b> .
<b>quantity unit</b>	Units of volume. If the unit of volume for the article have been entered into the master data, it is copied from the master article.
<b>quantity</b>	Volume which is stored in the warehouse or which is reserved for a removal of goods.

Field	Description
package code	Type of parcel
pieces	Number of parcels which are stored in the warehouse.

5. To save the incoming goods, click on the **OK** button.



**Tip:** The view does not update itself. To update the view, click on the icon **C**.

The incoming goods are shown in the overview.

## 1.2 Reserve removal of goods

This section describes how to reserve a removal of goods.

You have opened incoming goods.

1. Click on the icon **+** or **☒** in the **Operations** table.  
The window **Reserve** opens.
2. Fill out at least the mandatory fields.

Field	Description
reference	Reference number of the operation
ref.pos.	Position for reference number for the operation
quantity	Volume which is stored in the warehouse or which is reserved for a removal of goods.

3. To save the reservation, click on the **OK** button.  
The reservation is shown in the table.

## 1.3 Book removal of goods

This chapter describes how to book a removal of goods.

You have opened incoming goods.

1. Highlight the row of the **Operations** table which you would like to book.
2. Click on the icon **☒**.  
The removal of goods is booked. The removal is shown in the table.

## 1.4 Rebook incoming goods

This section describes how to rebook incoming goods.

You have opened incoming goods.

1. Click on the icon **→** in the **Operations** table.  
The window **Relocate** opens.
2. Enter the new storage area.
3. To save the rebooking, click on the **OK** button.  
The rebooking is shown in the table.

## 1.5 Create storage area

This section describes how to create a storage area for the warehouse inventory. You can enter several storage areas for a storage facility.

1. Select the menu entry **Start > Warehouse Inventory**.
2. Select the menu entry **storage area** in the area **Overviews**.  
This opens the overview **storage area**.
3. In the area **Related actions**, select the menu entry **new storage area**.  
This opens the **storage area** tab.
4. Fill out at least the mandatory fields.

Field	Description
<b>x coordinate</b>	X-coordinate of the warehouse
<b>y coordinate</b>	Y-coordinate of the warehouse
<b>z coordinate</b>	Z-coordinate of the warehouse
<b>length</b>	Length of the warehouse
<b>width</b>	Width of the warehouse
<b>height</b>	Height of the warehouse
<b>volume</b>	Volume of the warehouse
<b>stackable</b>	If the check box is activated, the goods can be stacked in the warehouse.
<b>locked</b>	If the check box is activated, the warehouse is locked.

5. To save the storage area, click the **Save** button in the **Actions** area.  
The storage area is shown in the overview.

## 2 Filter overviews

This chapter describes how you can filter overviews by entering search criteria.

1. Open an overview.
2. To filter the overview, fill the text fields or select values from drop-down menus.  
Depending on the overview, fields can have default values. Overwrite the contents if necessary.
3. Click on the button **Search**.  
The result of your search is displayed in the overview.



**Tip:** Depending on the context, an overview can also have one filter function per table column instead of search criteria.

To display the fields for filtering a column in a table, click on the icon.

You can filter the contents of a table column by selecting the column name from the drop-down menu of the filter and entering a value in the text field. You can filter for more table columns by clicking on the button.

### 2.1 Export overviews

This chapter describes how you can export overviews from CSV files for further processing with another program.

1. Open an overview.





**Tip:** If necessary, you can filter the overview first. Instructions for filtering the overview can be found in section [Filter overviews](#) on page 4.

2. In the area **Related actions**, click on the menu entry **Export Table**. Alternatively click on the icon .
3. There are several ways to select table columns for export:
  - To select a column, select the check box.
  - To deselect a column, clear the check box.
  - To select all columns, click the button **Select all**.
  - To select no columns, click the button **Unselect all**.
4. To show the table directly in your standard programme for CSV files, click on the **Show** button.
5. To save the table on your PC, click on the **Save** button.  
The window opens **Save**.
6. Select a location and a name for the file.
7. Click on the button **Save**.

### 3 Print/fax/mail document

This section describes how you print or fax a document or create it as a pdf file. You can request several documents at the same time; these are then combined to form one file when creating the pdf.

1. Click on the entry **Actions** in the area  **Actions print**  
The window **Reprint** will open.


 **Tip:** You can also print older messages for a customs declaration. For instructions on how to print a message, see section [Print/fax/mail message](#).

2. Highlight the form or document in the area **Available Document Types**.

Field	Description
<b>Available Document Types</b>	<p>The table is only shown if there are several types of document for the highlighted document.</p> <ul style="list-style-type: none"> <li>• Forms are manually created documents, for example shipments, customs declarations and customs responses, such as findings.</li> <li>• Documents are automatically created documents, for example export accompanying documents. Documents created previously are also listed. The time of creation of the document is shown in the column <b>Timestamp</b>. The documents can also be found in the document filing.</li> </ul>


3. Highlight the check box for the issue and enter the necessary data, such as an email address.

Field	Description
<b>Preview</b>	Prints or opens the document as a pdf document.
<b>Save document</b>	The document is stored.
<b>print</b>	If one (or several) printers have been defined and set up for the company by DAKOSY, the selection <b>print</b> will be displayed. The document is printed directly on the relevant printer.
<b>Fax</b>	The document is being sent as a fax.
<b>Email</b>	The document is sent as a pdf file in an attachment to an email.

 **Tip:** Alternatively, open the form or document as a pdf file by double clicking on it.

The appropriate columns **Name**, **Copies**, **Fax number** and/or **Email to** are automatically filled out in the table for the highlighted document type. You can see what you have already selected.

4. Highlight a further document type and repeat the previous step.
5. In order to create the documents, click on the button **OK**.

 **Tip:** If you print a customs form, please pay attention to the size of the form on the print-out. Some customs offices do not accept any print-outs which are not identical to the original form. To print out a PDF file of the correct size from Adobe Acrobat Reader, activate the **Custom Scale** option with the value **100 %** in the **Page Sizing & Handling** area of the print dialogue.



## 4 Contact information

You will find contact information in this section.

Questions on DAKOSY GE

- Contact partner: DAKOSY service desk
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- Email: [servicedesk@dakosy.de](mailto:servicedesk@dakosy.de)
- [Contact form](#)