VIRTUAL WAREHOUSE USER GUIDE

Version April 2016

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About This Guide

The purpose of this User Guide is to provide a simple reference tool to guide you through the basic functions of this program interface. Although there are a variety of processes available within this program, for the purposes of this guide we will focus only on those aspects which are regularly used by our Clients.

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INTRO

1.1 WHAT IS VIRTUAL WAREHOUSE?

Virtual Warehouse is a Web Portal interface designed to facilitate Client access to Self-Service Reporting Tools and Data Documents through a series of user-friendly Reports and/or Dashboards, which can then be used to manage items housed in our Warehouse Storage Facilities.

These include:

- **Logging-in** to the Portal & Retrieving a Lost/Forgotten Password
- Generating a **Stock Status Report**
- Exporting a **Stock Status Report**
- Navigation and Interaction with the **Item Details** Function
- Navigation and Interactions with the **Document Viewer** Function
- Functionality of the **Product Image Viewer**

We have also included a follow-up Section with information on accessing our **Full-Version User Guide** and how to contact us for direct **Tech Support**.

1.2 ABBREVIATIONS

- VW – Virtual Warehouse
- PO – Purchase Order
- SO – Sales Order
- BO – Back Order
- OH – On Hand
- BL – Batch Lines
- Web Browser – a software application used to locate and display web pages

ACCESSING THE PORTAL

1.3 LOGIN SCREEN

To access the Virtual Warehouse, each User will be provided by CTL with a set of User Credentials, with which they can log into the Web Portal.

Each Client will also be provided with a URL in order to access and view the data specific to them within the Virtual Warehouse.

To initiate the Login Procedure, open whatever Internet Browser is standard for your system and enter the URL http://warehouse.ctlglobalsolutions.com in the browser URL bar.

The Login Screen should appear like this example:

Enter the **User Credentials** as supplied by **CTL** and click on “LOGIN.”

ACCESSING THE PORTAL

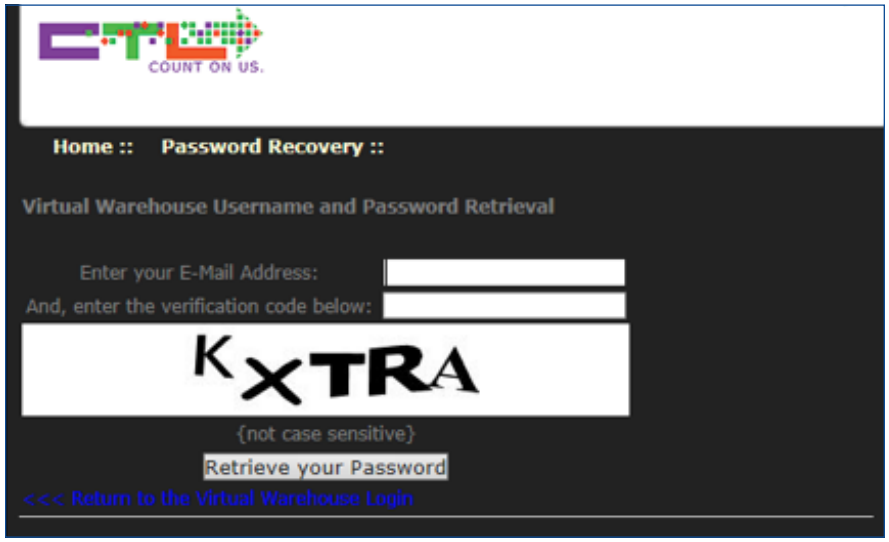
1.3.1 PASSWORD RESET

If you should need to reset your password for any reason, click on the **Forgot your password** link provided on the Login Screen.

This will open a new window where you will be asked to enter your email address and the system generated code displayed on the page into the corresponding fields.

Once both entries are complete, click on the **Retrieve Password link** and an email will be sent to you with your User ID and Password.

Return to the Login Screen to sign in using the standard procedure.

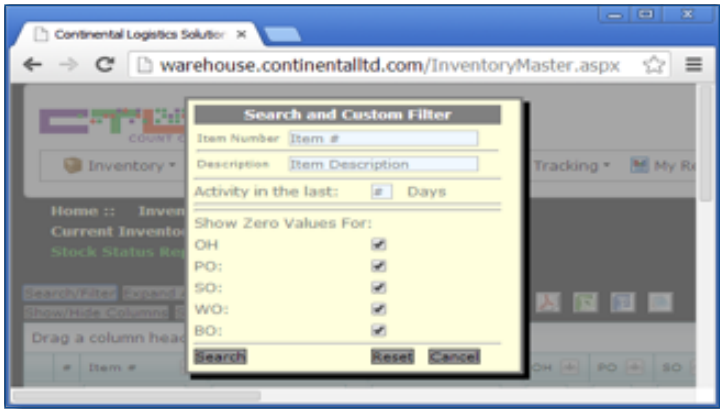


ORGANIZING THE DISPLAY

2.1 CHOOSING/ORGANIZING COLUMNS/ROWS DISPLAYED

Once the **Stock Status Report** is opened, depending on the exact type of information you are looking to View and/or Export, there are several ways that you can alter the Inventory Catalog View to display the specific information you would like to see. One option is to use the **Search and Custom Filter** function.

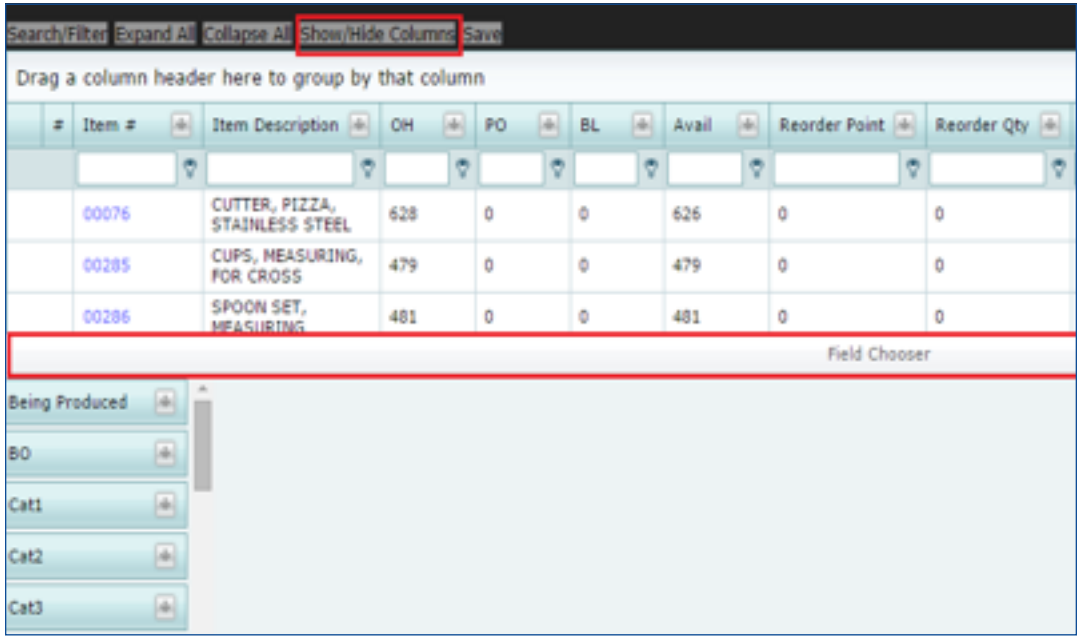
Click on the **Search/Filter** button below the Home button. The **Search and Custom Filter** window will open where you can select which fields are visible. Just like in the screen shot to the left.



Additionally, you can choose which columns are visible by clicking on the **Show/Hide Column** link, which will open a new window in which will be listed all the columns not currently on display. This window will open on top of the bottom half of the Stock Status Report.

ORGANIZING THE DISPLAY

Click on a Column Header and drag it into the **Field Chooser** window to remove it from the active View. Click and drag out of **Field Chooser** window to reverse the process.



You can also change the **Sequence** in which the column headers are listed by clicking on a column header holding down the left mouse button and moving the column header into the spot where you want it to be displayed. As you move it white arrows will appear above and below the header pointing to where the column will drop when you release the mouse button.

To choose the number of **Rows** you want the Stock Status Report to display click on the **Options** link. The first available selection allows you to choose the number of rows which will automatically be displayed in the Report view.

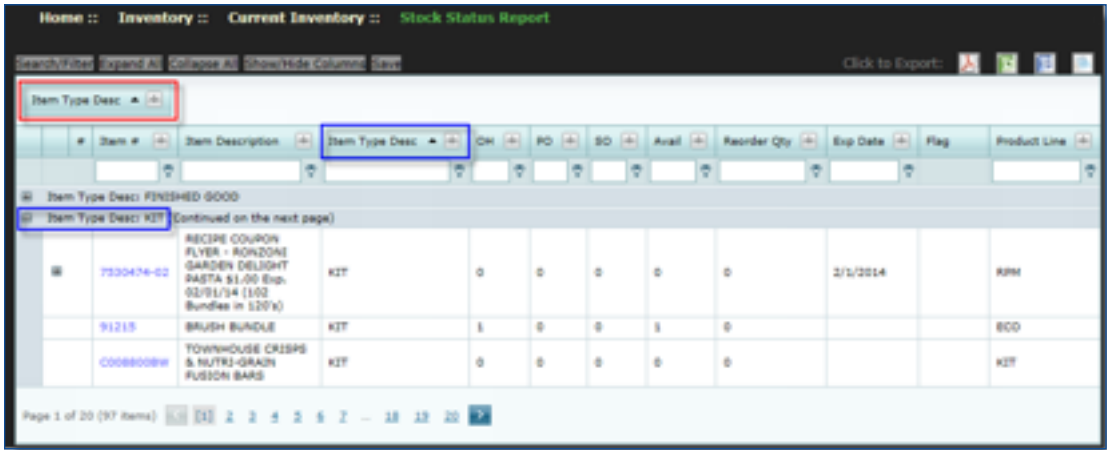
Make sure to click on the **Save Grid Row Selection** after adjusting the Row Display slider, before returning to the Stock Status Report View.

SORTING THE VIEW

2.2 SORTING COLUMN DATA VIEW

You can run a Sort Selection on the entire database.

To group the Items by Category, select a Column Header (indicated in **blue**) and drag it into the **Drag a column header here to group by that column** area (indicated in **red**) of the Inventory Catalog View.

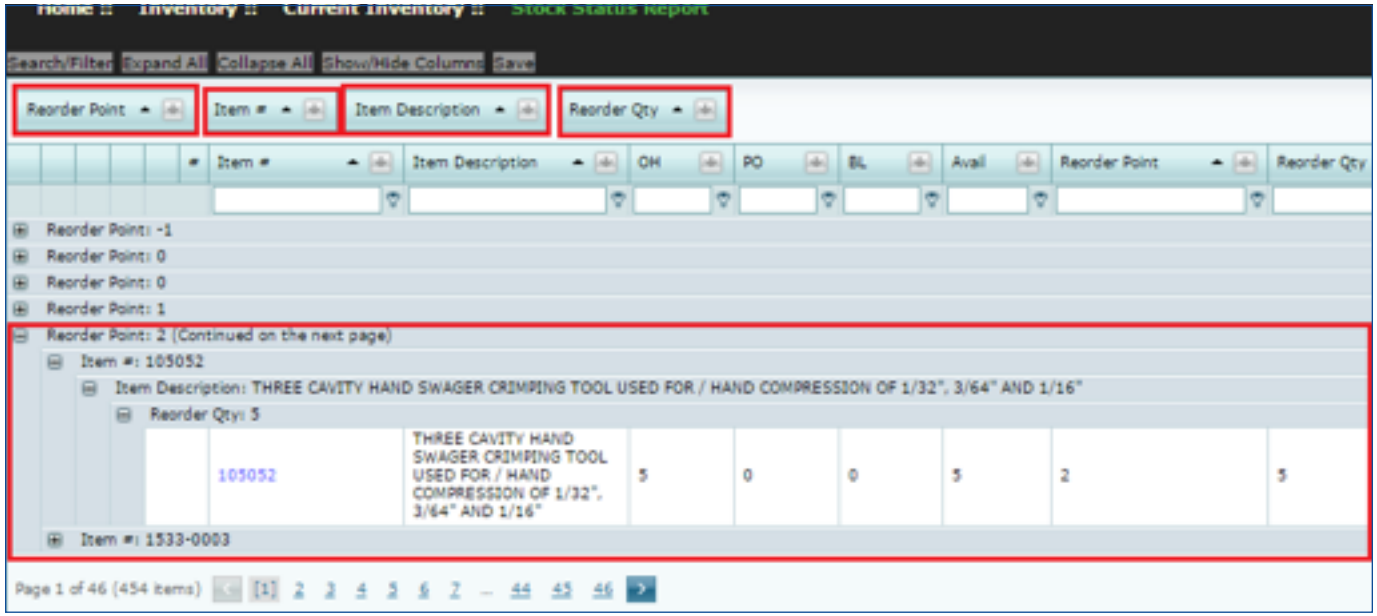


The view will then display the Inventory Catalog grouped by the selected field (in example above, **Item Type Description**).

To undo this Sort Selection, just drag the Column Header out of the Sorting Filter and the Original View will be restored.

SORTING THE VIEW

You can drag multiple column headers into the **Drag a column header here to group by that column** area to sort by multiple categories (in the example below, **Reorder Point, Item#, Item Description**, and **Reorder Qty**).

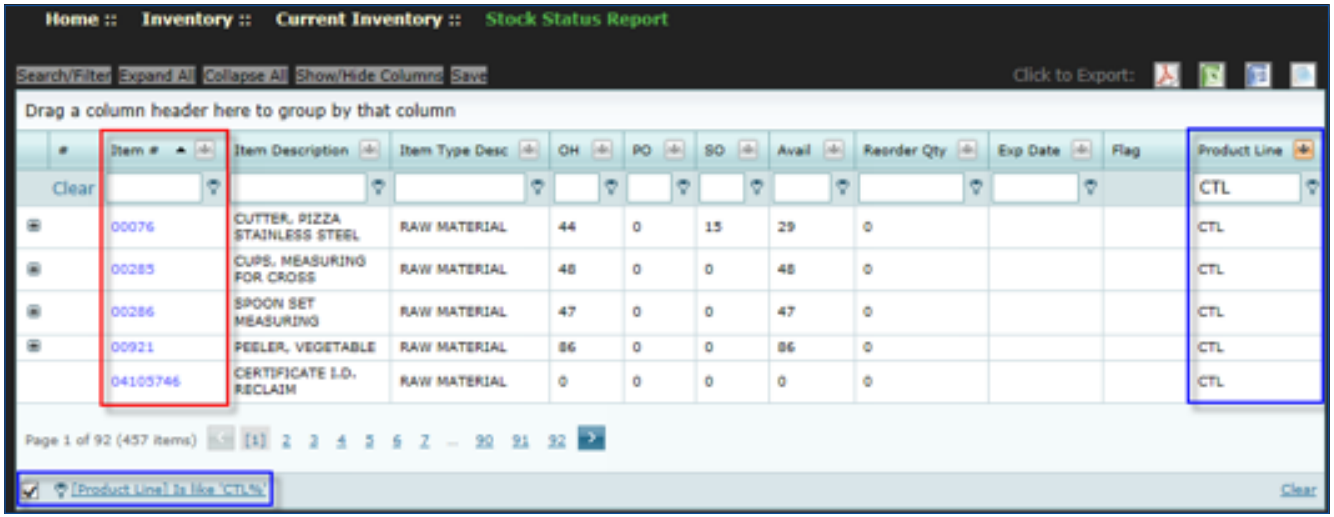


By clicking on the **+Sign** to the left of each item displayed, the individual grouping is expanded so all Items in that category are displayed. Click it again (now a **–Sign**) to return to the condensed view.

An alternative option is to define a narrower selection of Items based on a Specific Data Point.

SORTING THE VIEW

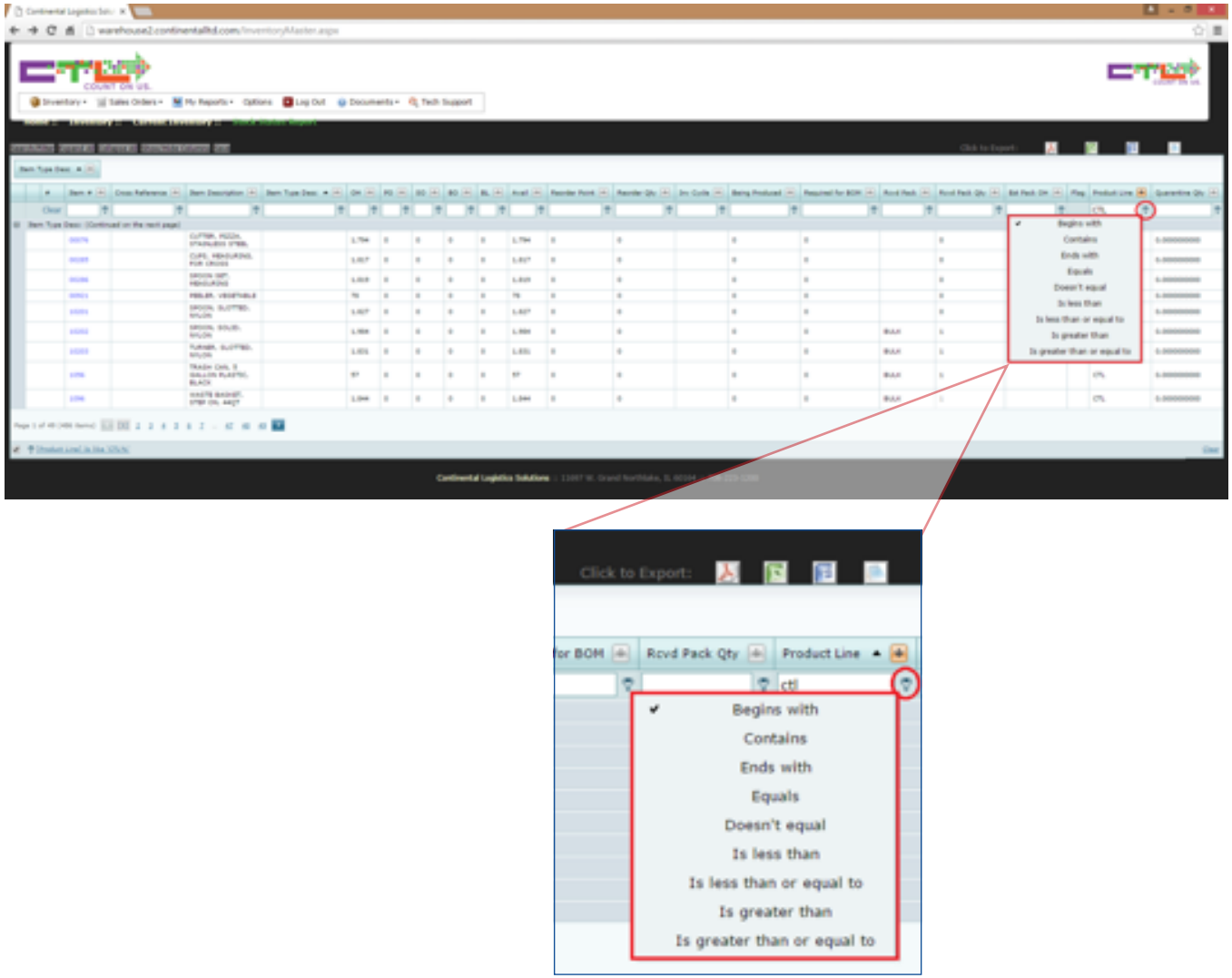
For example, when we enter the characters “CTL” into the **Product Line** field (marked in **blue** below), the Inventory Catalog is filtered to display only those marked as **CTL** as their **Product Line**. Any column that appears on the screen can be filtered.



The display can be further adjusted to display all the entries in Ascending order by clicking on any of the other Column Headers (in the above example, the **Item #** Column Header was selected). If you click on the selected Column Header again, it will display all entries in Descending order.

SORTING THE VIEW

You can click on the picture to the right of any of the columns (circled in **red** in the screen shot below) and choose from the drop down (outlined in **red** below) exactly how you want to filter by the trigger word you typed in (for example begins with, contains, equals, etc.

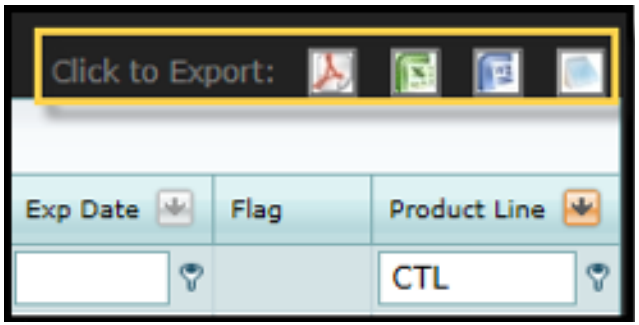


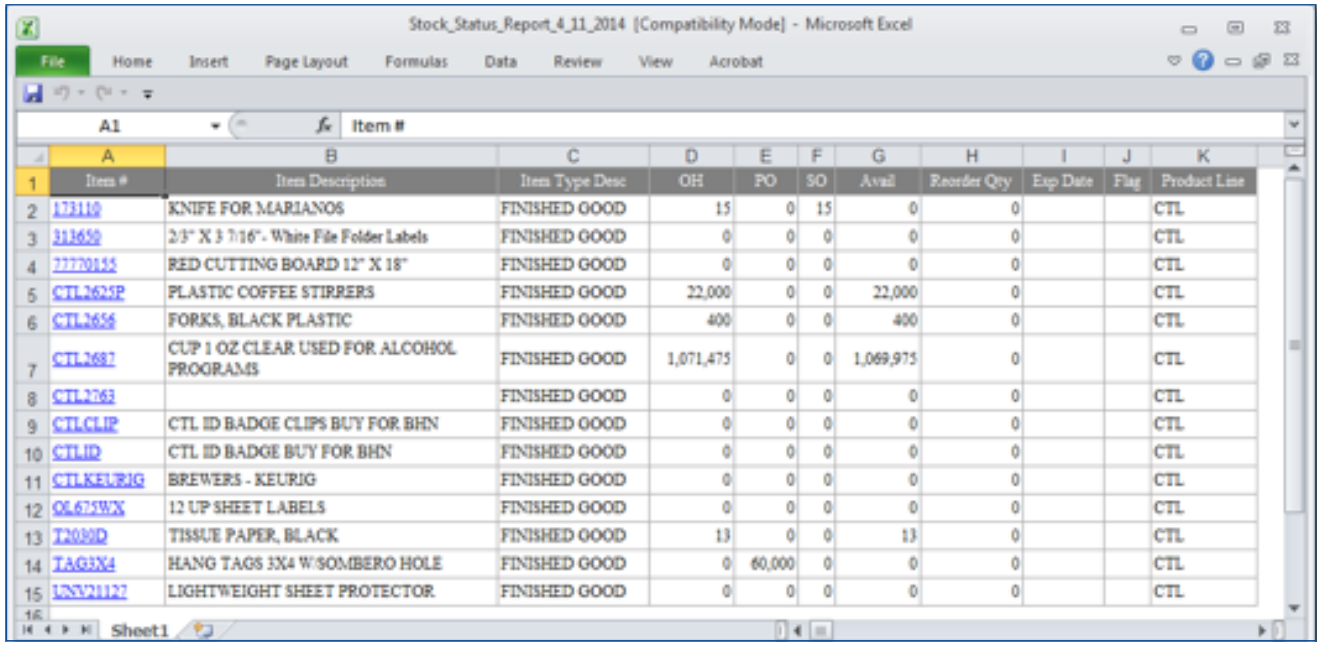
EXPORT REPORT DATA

2.3 EXPORT REPORT DATA

To export a **Stock Status Report** to **PDF**, **Excel**, **Word**, or **CSV** files, click on the **Click to Export** icon that corresponds with whichever format you wish to export the data into.

The Exported data will contain all the information associated with all Items in the currently selected View.





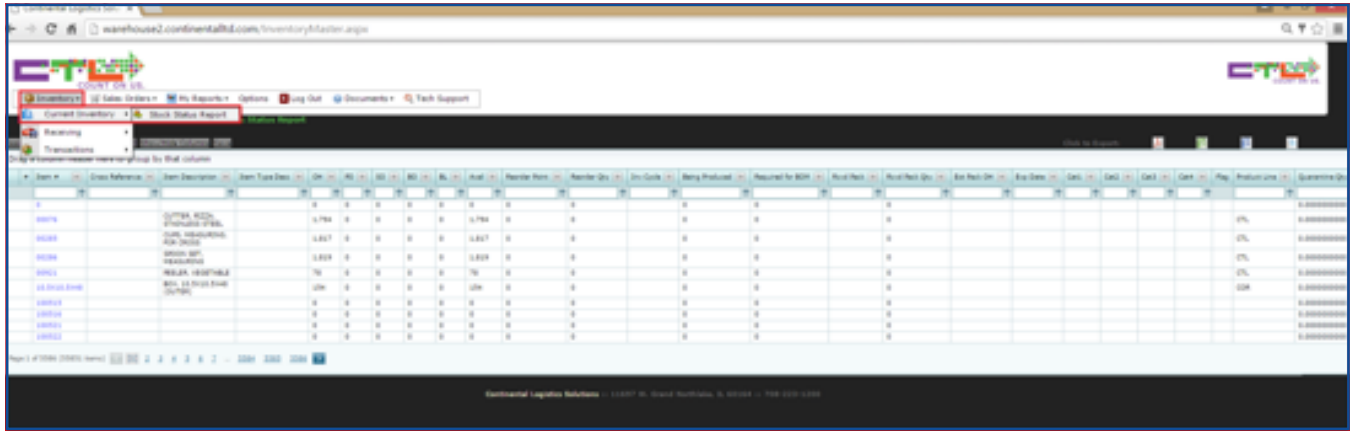
	A	B	C	D	E	F	G	H	I	J	K
1	Item #	Item Description	Item Type Desc	OH	PO	SO	Avail	Reorder Qty	Exp Date	Flag	Product Line
2	173110	KNIFE FOR MARIANOS	FINISHED GOOD	15	0	15	0	0			CTL
3	313650	2/3" X 3 7/16" - White File Folder Labels	FINISHED GOOD	0	0	0	0	0			CTL
4	77770155	RED CUTTING BOARD 12" X 18"	FINISHED GOOD	0	0	0	0	0			CTL
5	CTL2625P	PLASTIC COFFEE STIRRERS	FINISHED GOOD	22,000	0	0	22,000	0			CTL
6	CTL2656	FORKS, BLACK PLASTIC	FINISHED GOOD	400	0	0	400	0			CTL
7	CTL2687	CUP 1 OZ CLEAR USED FOR ALCOHOL PROGRAMS	FINISHED GOOD	1,071,475	0	0	1,069,975	0			CTL
8	CTL2763		FINISHED GOOD	0	0	0	0	0			CTL
9	CTLCLIP	CTL ID BADGE CLIPS BUY FOR BHN	FINISHED GOOD	0	0	0	0	0			CTL
10	CTLID	CTL ID BADGE BUY FOR BHN	FINISHED GOOD	0	0	0	0	0			CTL
11	CTLKEURIG	BREWERS - KEURIG	FINISHED GOOD	0	0	0	0	0			CTL
12	OL675WX	12 UP SHEET LABELS	FINISHED GOOD	0	0	0	0	0			CTL
13	T2030D	TISSUE PAPER, BLACK	FINISHED GOOD	13	0	0	13	0			CTL
14	TAG3X4	HANG TAGS 3X4 W/SOMBERO HOLE	FINISHED GOOD	0	60,000	0	0	0			CTL
15	UNV21127	LIGHTWEIGHT SHEET PROTECTOR	FINISHED GOOD	0	0	0	0	0			CTL

STOCK STATUS REPORT

3.1 STOCK STATUS REPORT

The **Stock Status Report** is the Home Page which you are automatically directed to when you log in. Below is an example of what your **Stock Status Report** will look like.

You may not be able to see all the columns across. You can click the 3 horizontal lines in the top right corner (right under the X to close the window) and click on the – next to **Zoom** to zoom out until you can see all the columns.

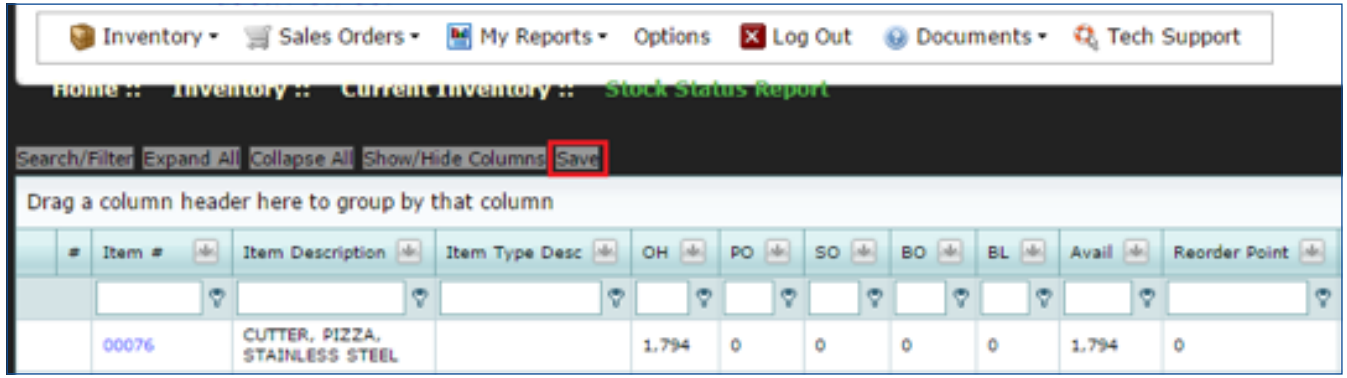


Alternately, you click on the **Inventory** Menu option, select **Current Inventory** and then **Stock Status Report**, which will take you to the exact same location. These steps are outlined in **red** in the screen shot above.

You can reach the **Stock Status Report** at any time from any other page in the Virtual Warehouse by following this same procedure or clicking on **Home**.

STOCK STATUS REPORT

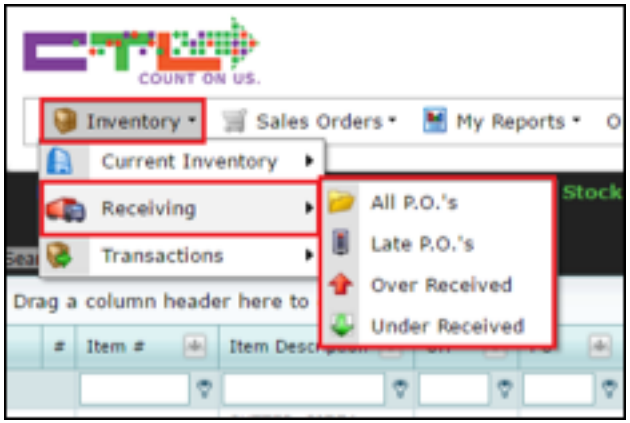
You can save any of your customizations to the Stock Status Report layout by clickling on the save button outlined in **red** below.



RECEIVING: ALL P.O.s

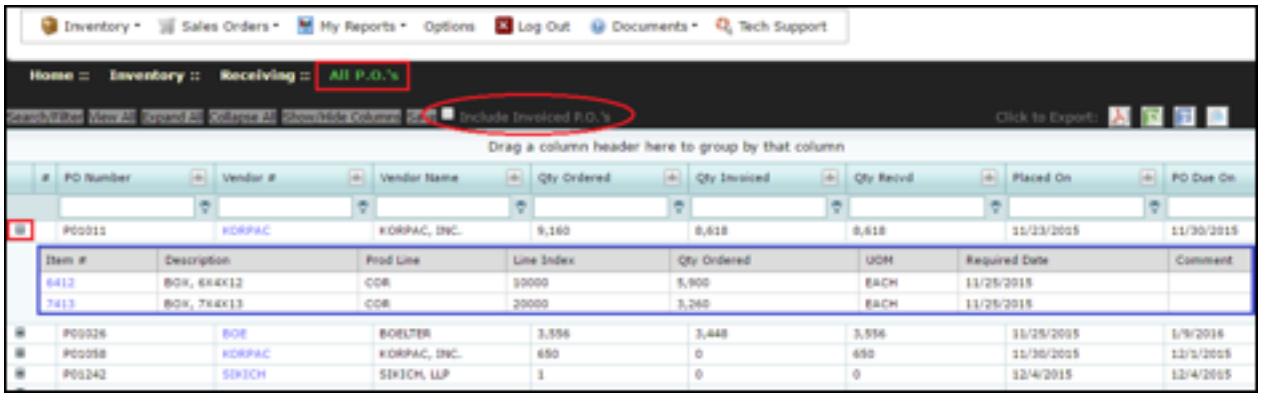
4.1 RECEIVING: ALL P.O.s

To view information on P.O.s click on the **Inventory** drop down button on the top left and choose **Receiving** a window will pop up to the right with 4 options (All P.O.'s, Late P.O.'s, Over Received and Under Received).



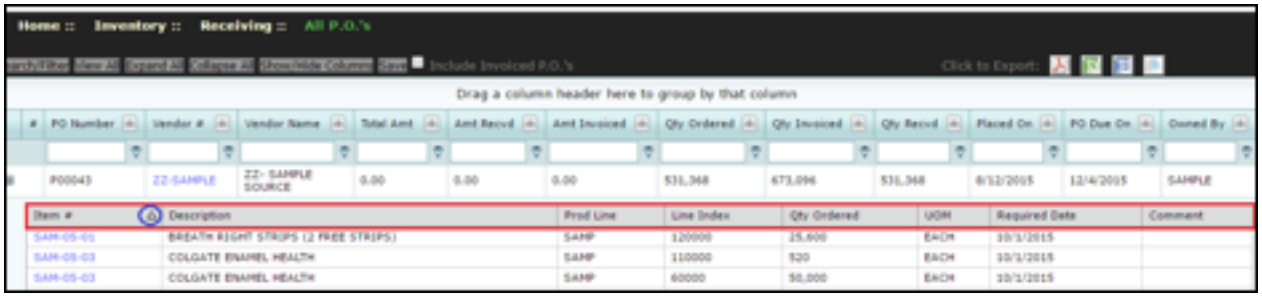
You can click on **All P.O.'s** to view all active P.O.s. The screen below will appear with All P.O.'s in green next to Receiving. If you want to view P.O.s that have already been invoiced too you can check the box that says **Include Invoiced P.O.'s** (circled in red in the picture below). Please refer to the Portal Procedures section for instructions on how to sort and filter the data shown.

Click on the + sign to the left of any P.O. # (outlined in red in the picture below) and it will expand to show all the items on that P.O. (outlined in blue in the picture below) and click it again (now a – sign) to collapse it.



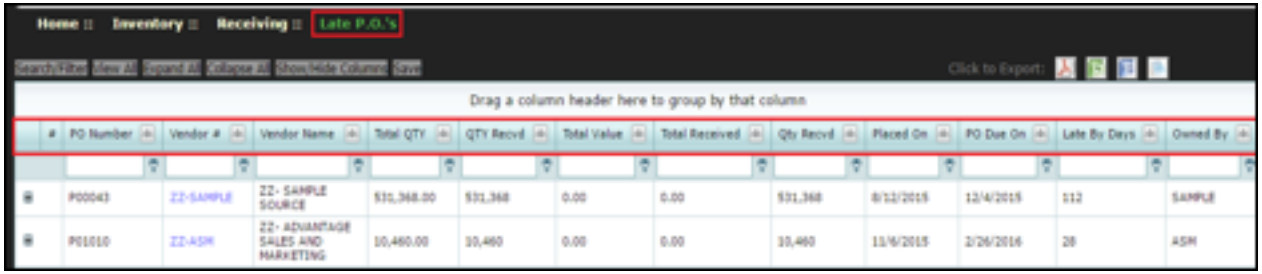
RECEIVING: ALL P.O.s / LATE P.O.s

If you click on the item # or any other Item column header outlined in red in the picture below an arrow will appear (blue circle around it) and you can sort any of the columns in ascending or descending order.



4.2 RECEIVING: LATE P.O.S

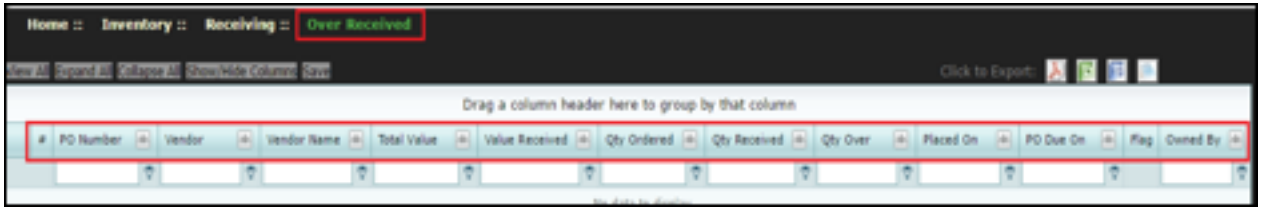
Click on the **Inventory** drop down in the top left of the screen, choose **Receiving**, and click on Late P.O.'s, the screen blow will appear with Late P.O.'s in green next to Receiving. **Late P.O.'s** will only show P.O.'s that had products received past the date they was due to CTL. The P.O.'s displayed will expand and sort the same way as described under All P.O.'s and will sort and filter data as described under Section 2 Portal Procedures.



RECEIVING: OVER RECEIVED

4.3 RECEIVING: OVER RECEIVED

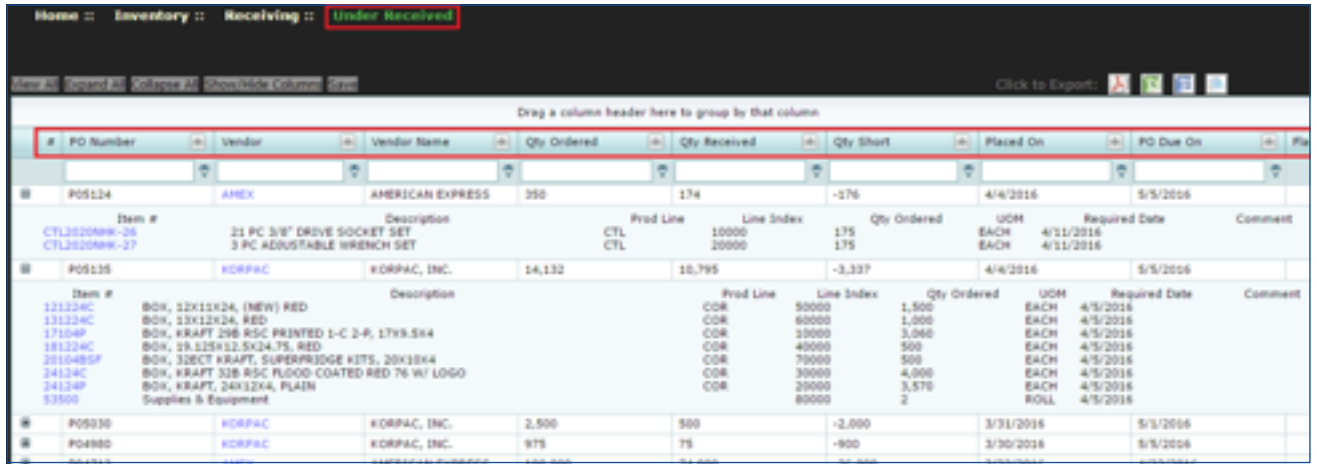
Go to the **Inventory** drop down in the top left of the screen, choose **Receiving**, and click on **Over Received**. Over Received will show up in green next to Receiving and the screen pictured below will appear displaying all P.O.s that CTL received **more** products for than what was indicated on the P.O. sent from the Client. Please refer to the Portal Procedures section for instructions on how to sort and filter the data shown.



RECEIVING: UNDER RECEIVED

4.4 RECEIVING: UNDER RECEIVED

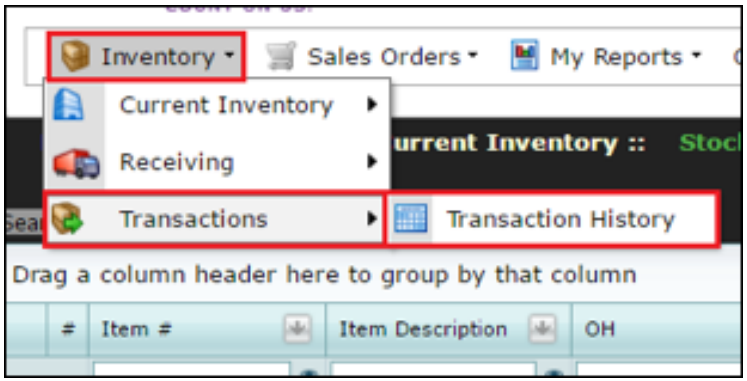
Go to the **Inventory** drop down in the top left of the screen, choose **Receiving**, and click on **Under Received**. Under Received will show up in green next to Receiving and the screen pictured below will appear displaying all P.O.s that CTL received **less** products for than what was indicated on the P.O. sent from the Client. Please refer to the Portal Procedures section for instructions on how to sort and filter the data shown.



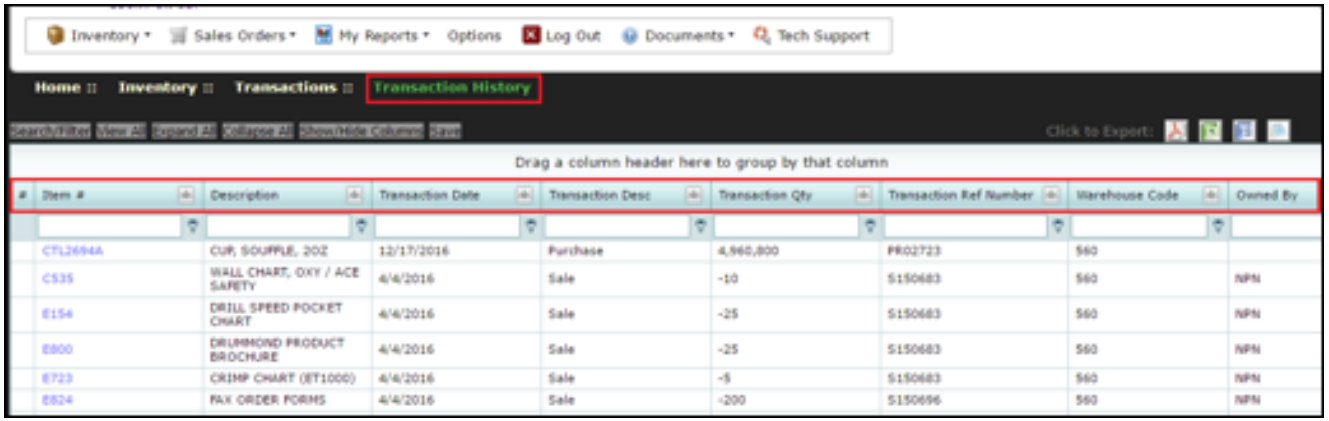
TRANSACTIONS

5.1 TRANSACTION HISTORY

To view the Transaction History click on the **Inventory** drop down and select **Transactions** and **Transaction History**.



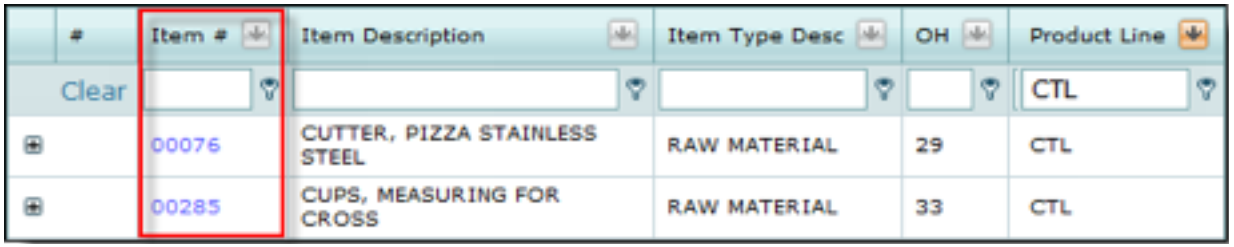
Transaction History will show up in green next to Transactions and the screen pictured below will appear displaying all transactions made. Please refer to the Portal Procedures section for instructions on how to sort and filter the data displayed.



ITEM DETAIL VIEW / ITEM DESCRIPTION

6.1 ITEM DETAIL VIEW

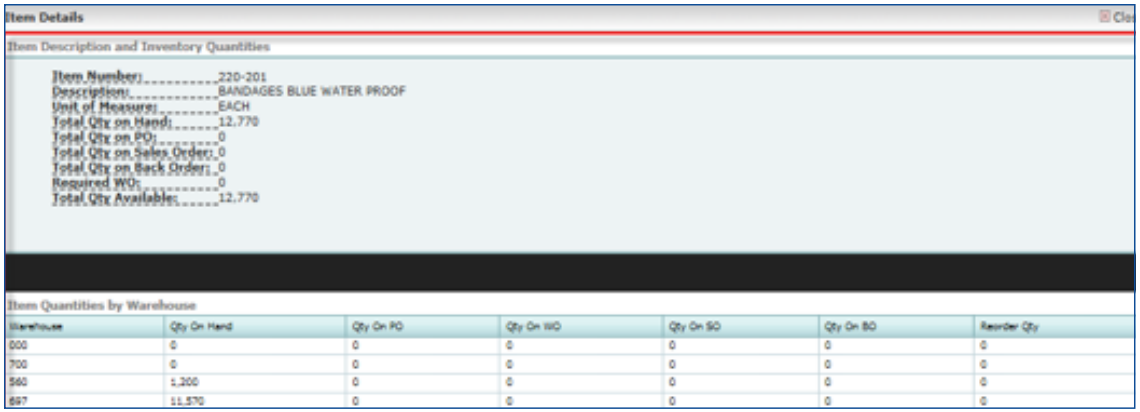
To access the **Item Detail View**, select an Item from the Inventory Catalog and click on the Item Number displayed on the left-hand side of the Stock Status Report View.



#	Item #	Item Description	Item Type Desc	OH	Product Line
Clear					CTL
⊞	00076	CUTTER, PIZZA STAINLESS STEEL	RAW MATERIAL	29	CTL
⊞	00285	CUPS, MEASURING FOR CROSS	RAW MATERIAL	33	CTL

6.2 ITEM DESCRIPTION

The first section of the **Item Detail View** displays the specific data detail for the Item, including Quantity, Description & Expiration Date, if applicable.

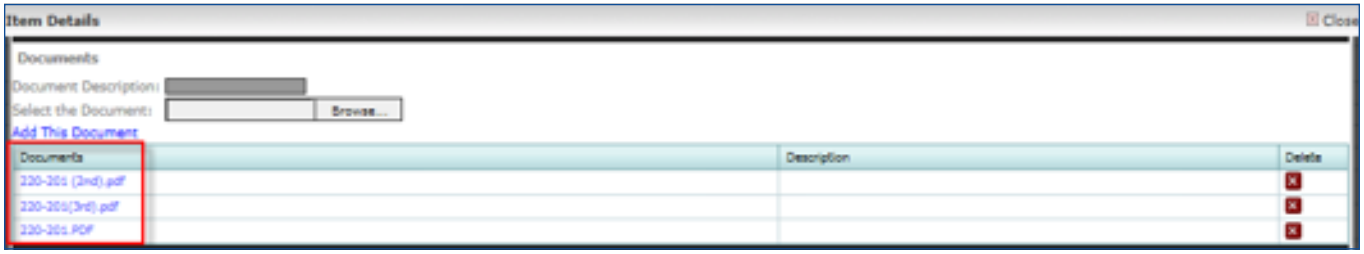


CTL tracks this data and matches any reorders against existing Inventory to verify accuracy of production quality/copy.

RECEIVING SHIPMENT DOCUMENTS

6.3 RECEIVING SHIPMENT DOCUMENTS

The second section of the **Item Detail View** displays a listing of all scanned Paperwork attached to Shipment(s) (i.e. Receiving Documents, Packing Slips, Bill of Ladings, etc.).



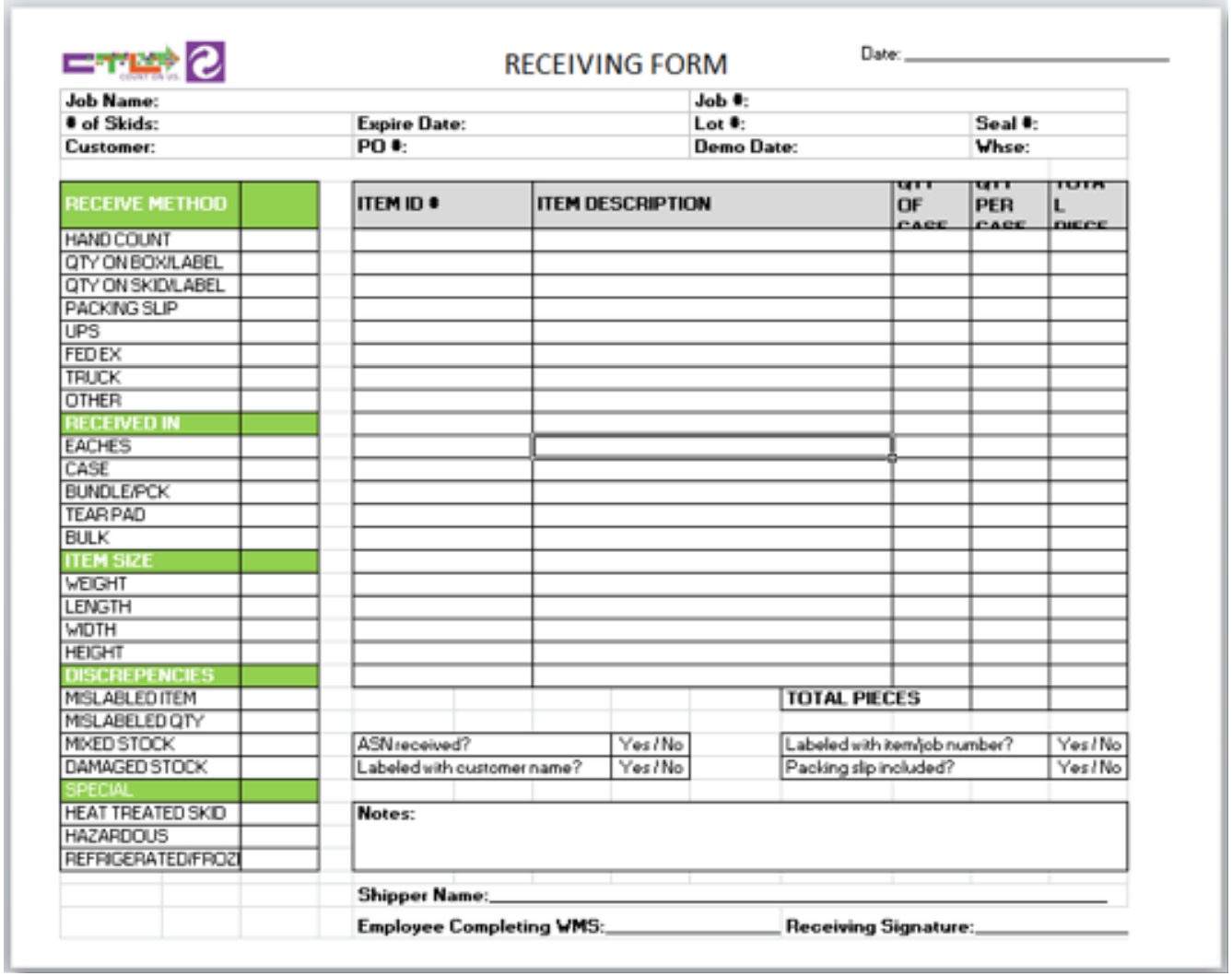
Each of these Line Items is a clickable link that will open the corresponding document in the Document Viewer.

All **Shipments** received in our warehouse are checked in daily and made available online 24 hours after receiving is processed.

All **Documents** received with **Shipment(s)** (i.e. Packing Slips, Bill of Ladings, etc.) are scanned/ uploaded.

RECEIVING SHIPMENT DOCUMENTS

All Receiving Forms are completed according to our ISO 9001:2008 certificate# FS 577476 certification/process.



RECEIVING FORM

Date: _____

Job Name:		**Job #:**	
# of Skids:	**Expire Date:**	**Lot #:**	**Seal #:**
Customer:	**PO #:**	**Demo Date:**	**Whse:**

RECEIVE METHOD		ITEM ID #	ITEM DESCRIPTION	QTY OF CASE	QTY PER CASE	TOTAL PIECE
HAND COUNT						
QTY ON BOX/LABEL						
QTY ON SKID/LABEL						
PACKING SLIP						
UPS						
FED EX						
TRUCK						
OTHER						
RECEIVED IN						
EACHES						
CASE						
BUNDLE/PCK						
TEAR PAD						
BULK						
ITEM SIZE						
WEIGHT						
LENGTH						
WIDTH						
HEIGHT						
DISCREPENCIES						
MISLABLED ITEM				TOTAL PIECES		
MISLABELED QTY						
MIXED STOCK		ASN received?	Yes / No	Labeled with item/job number?		Yes / No
DAMAGED STOCK		Labeled with customer name?	Yes / No	Packing slip included?		Yes / No
SPECIAL						
HEAT TREATED SKID		**Notes:**				
HAZARDOUS						
REFRIGERATED/FROZI						

Shipper Name: _____

Employee Completing WMS: _____ **Receiving Signature:** _____

RECEIVING SHIPMENT DOCUMENTS

Examples:

CTL Receiving Form

Packing Slip

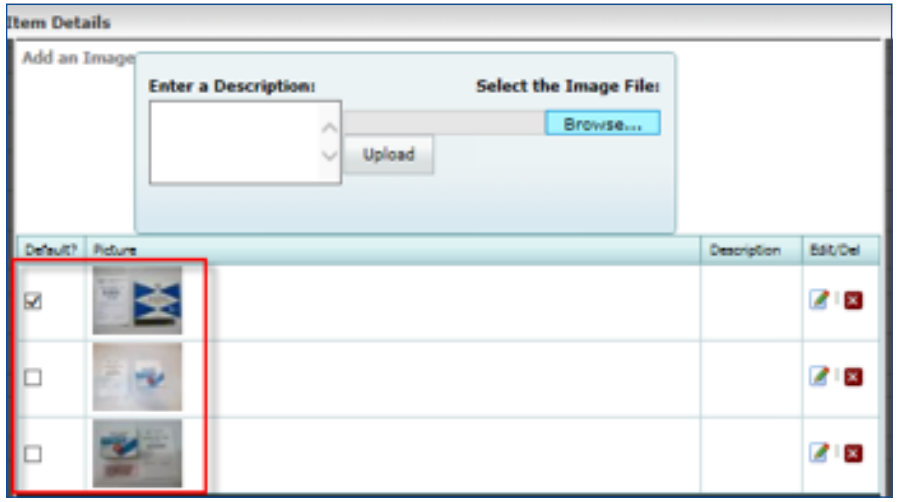
Bill of Lading

PRODUCT IMAGE VIEWER

6.4 PRODUCT IMAGE VIEWER

The last section of the **Item Detail View** displays a listing of all uploaded **Image Files** associated with the **Item** in the **Inventory Catalog**.

Click on any of the **Image File** icons will open up the Image in the **Product Image Viewer**.

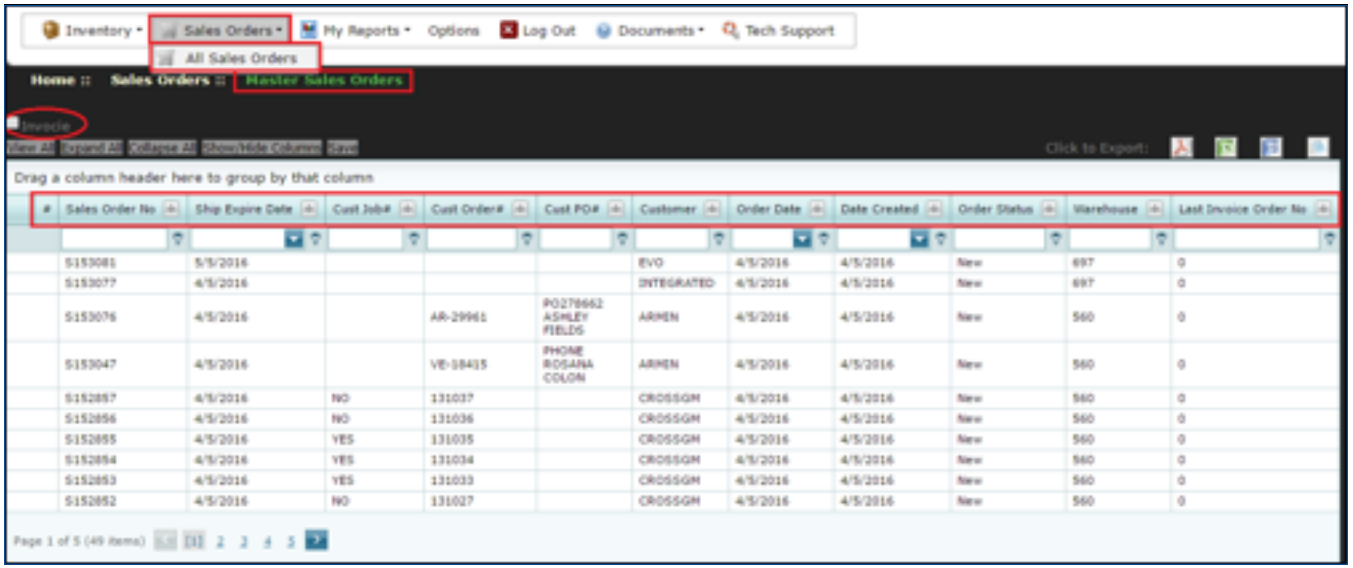


Clicking the thumbnail version of the Item Image within the Item Details Viewer opens a pop-up window that displays a larger version of the thumbnail.

SALES ORDERS

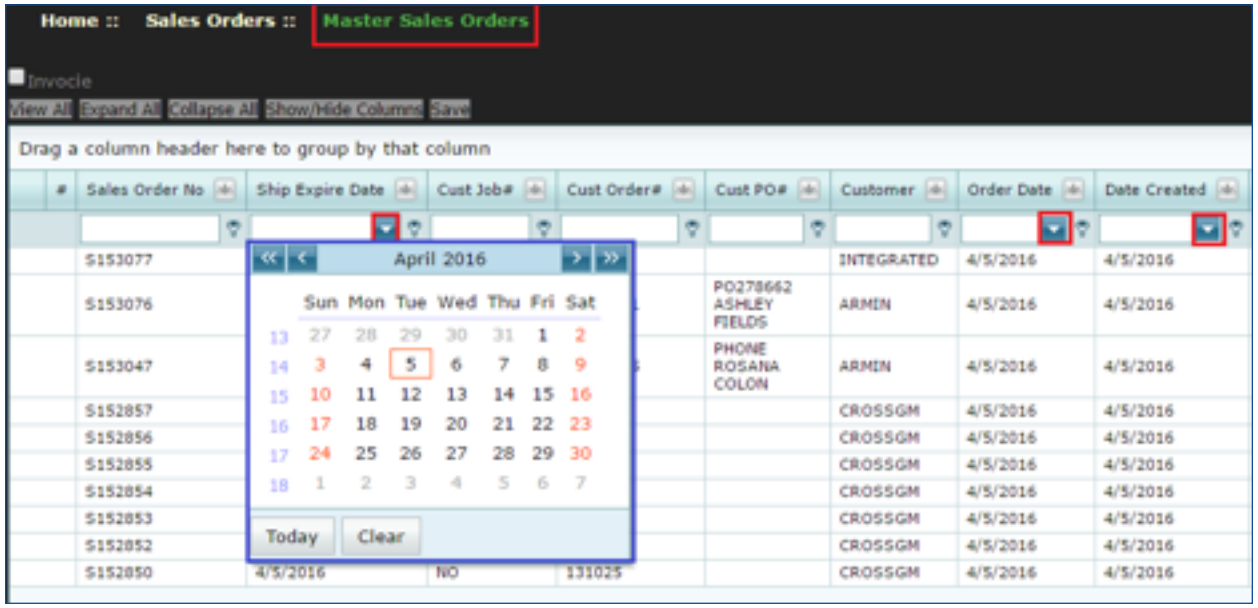
7.1 SALES ORDERS

To view Sales Orders section click on the **Sales Orders** drop down and select **All Sales Orders**. **Master Sales Order** will show up in green next to Sales Orders and the screen pictured below displaying the data pertaining to all the Client's Sales Orders. Check the **Invoice** box (circled in red) to show only invoiced sales orders.



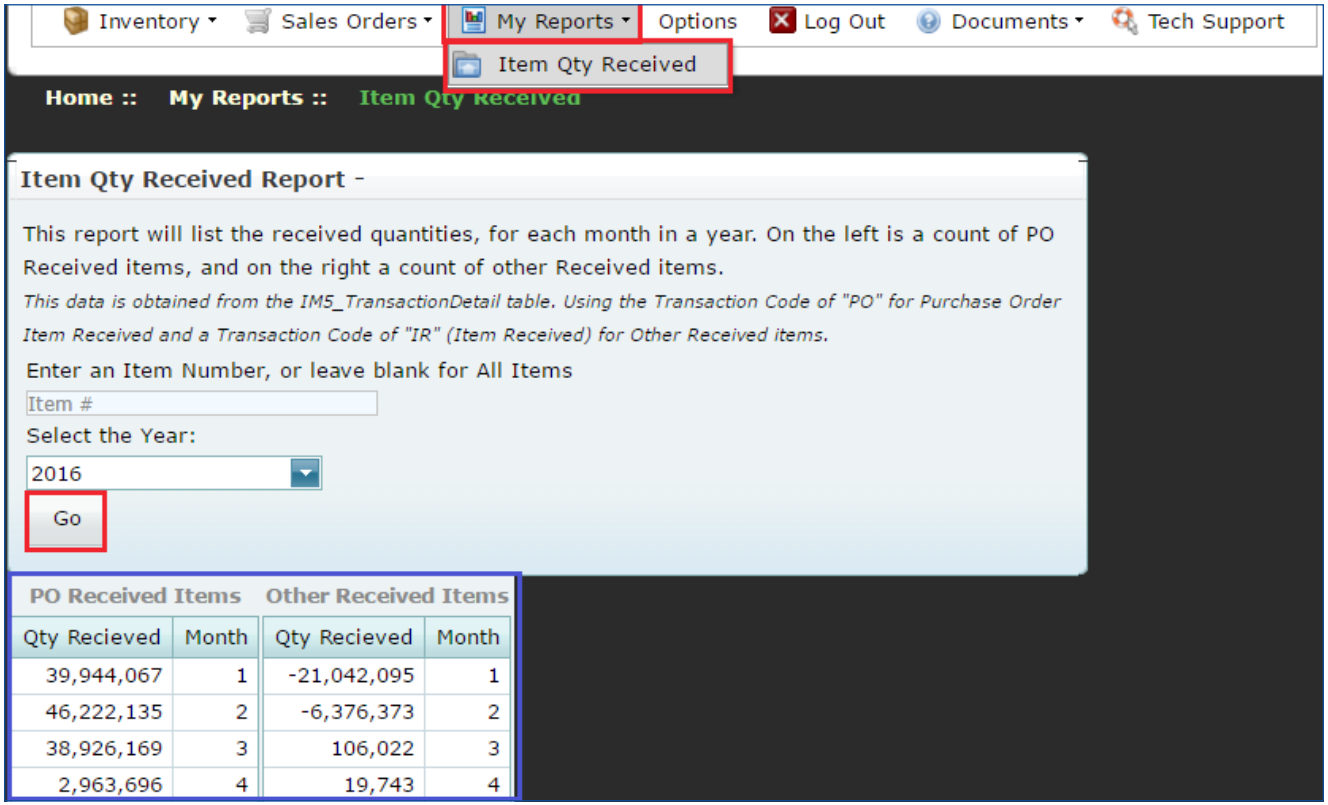
SALES ORDERS

Click the blue arrow to the right of the sorting box below column headers referring to dates (outlined in red in the picture below) and a calendar will pop up for you to select a date to filter by. Please refer to the Portal Procedures section for additional instructions on how to sort and filter the data shown.



8.1 MY REPORTS

The Item Qty Received Report allows you to specify a specific item number, or report on all items (leave the Item # field blank). Click on the My Reports drop down and click on Item Qty Received (outlined in red in the picture below). Then, after selecting the Year and clicking the GO button, two lists will be presented. One being the number of PO Received Items by month, and the other, the number of received other type items by month:



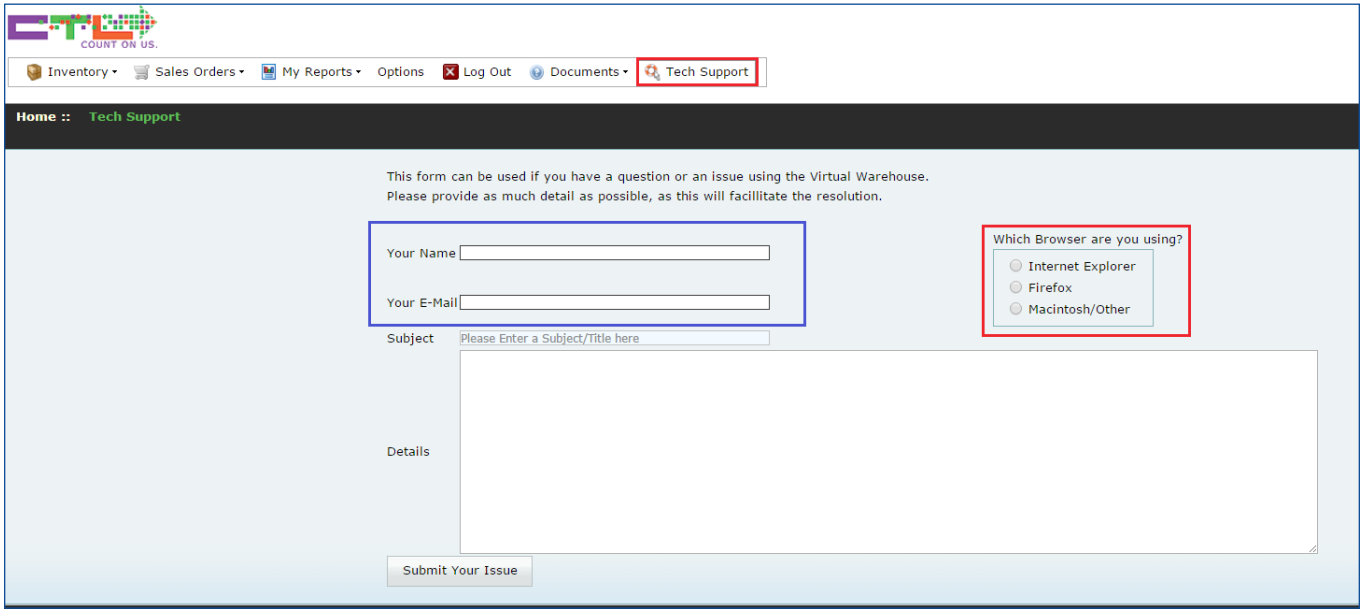
PO Received Items		Other Received Items	
Qty Recieved	Month	Qty Recieved	Month
39,944,067	1	-21,042,095	1
46,222,135	2	-6,376,373	2
38,926,169	3	106,022	3
2,963,696	4	19,743	4

ADDITIONAL TECH SUPPORT RESOURCES

9.1 TECH SUPPORT REQUEST

To submit a Tech Support Request regarding an issue you might be experiencing with the Virtual Warehouse Web Portal, click on the **Tech Support** link in the top menu options.

A form will open where you can then select the browser that you are currently working with and enter all pertinent details regarding your issue in the space provided. Your name and email will already be input into the form based off of your Log-In User credentials.



One of our staff members will review your request and respond as soon as possible.

If you are unable to log in to the Virtual Warehouse to submit a Tech Support Request please contact your CTL Account Manager for assistance.

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