Aquapurite ERP - Warehousing & Logistics User Guide

For Warehouse Manager, Logistics Team & Dispatch

Version: 1.0 **Last Updated:** January 2026

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1. Overview

Modules Covered

Module	Purpose
Inventory	Stock levels, transfers, adjustments
WMS	Zones, bins, putaway rules
Logistics	Shipments, transporters, tracking

Setup Sequence

```
1. Create Warehouses
      ↓
2. Define Zones (WMS)
      ↓
3. Create Bins (WMS)
      ↓
4. Setup Putaway Rules
      ↓
5. Add Transporters
      ↓
6. Configure Serviceability
      ↓
7. Set Rate Cards
      ↓
Ready for Operations
```

2. Inventory Management

2.1 Warehouses Setup

Navigation: Inventory → Warehouses

Standard Warehouse Structure

Code	Name	Type	Purpose
WH-HQ	Head Office Warehouse	OWNED	Primary storage
WH-DEL	Delhi Regional Hub	OWNED	North India distribution
WH-MUM	Mumbai Regional Hub	OWNED	West India distribution
WH-BLR	Bangalore Hub	OWNED	South India distribution
WH-QC	Quality Check	OWNED	Inspection area
WH-DEF	Defective Stock	OWNED	Rejected/returned items
WH-TRN	In Transit	VIRTUAL	Goods being shipped

Creating a Warehouse

1. Go to **Inventory → Warehouses**
2. Click **+ New Warehouse**
3. Enter:

Field	Required	Description
Code	Yes	Unique identifier (e.g., WH-DEL)
Name	Yes	Full warehouse name
Type	Yes	OWNED, RENTED, VIRTUAL, 3PL
Address	Yes	Complete address
City	Yes	City name
State	Yes	State
Pincode	Yes	6-digit PIN
Manager	No	Warehouse in-charge
Contact Phone	Yes	For coordination
Is Active	Yes	Enable/disable

4. Click **Save**

Warehouse Types

Type	Description	Example
OWNED	Company-owned facility	Factory warehouse
RENTED	Leased space	Rented godown
VIRTUAL	Logical warehouse	In-transit stock

3PL	Third-party logistics	Delhivery hub
FRANCHISE	Franchisee location	Dealer stock point

2.2 Stock Summary

Navigation: Inventory → Stock Summary

View real-time inventory levels across all warehouses.

Understanding Stock Levels

Column	Meaning
Available	Stock ready for sale/dispatch
Reserved	Allocated to orders (not yet shipped)
In Transit	Shipped but not delivered
Damaged	Defective/returned stock
Total	Sum of all stock

Stock Formula

```
Available = Total − Reserved − Damaged
Sellable = Available
```

Filtering Stock View

Filter by:

- Warehouse
- Product Category
- Brand
- Stock Status (In Stock, Low Stock, Out of Stock)
- Below Reorder Level

2.3 Stock Items

Navigation: Inventory → Stock Items

Detailed view of individual SKU inventory.

Information Shown

Field	Description
SKU	Product code
Product Name	Product description
Warehouse	Location

Batch Number	Manufacturing batch
Serial Numbers	Individual unit serials
Expiry Date	For consumables
Last Updated	Last movement date

2.4 Stock Transfers

Navigation: Inventory → Transfers

Move stock between warehouses.

Creating a Transfer

1. Go to **Inventory → Transfers**
2. Click **+ New Transfer**
3. Enter:

Field	Required	Description
Source Warehouse	Yes	Where stock is coming from
Destination Warehouse	Yes	Where stock is going
Transfer Date	Yes	When transfer initiated
Transfer Type	Yes	INTER_WAREHOUSE, BRANCH, RETURN
Reference	No	PO number, return reference

4. Add items:
   - Select Product
   - Enter Quantity
   - Select Batch/Serials (if applicable)
5. Click **Save** or **Submit for Approval**

Transfer Status Flow

```
DRAFT → PENDING_APPROVAL → APPROVED → IN_TRANSIT → RECEIVED → COMPLETED
```

Status	Action
Draft	Can edit items
Pending Approval	Waiting for manager approval
Approved	Ready for dispatch
In Transit	Goods shipped, update tracking
Received	Destination confirmed receipt
Completed	Stock updated in both warehouses

Receiving a Transfer

At destination warehouse:

1. Go to **Inventory → Transfers**
2. Filter: Status = In Transit, Destination = Your Warehouse
3. Open transfer
4. Click **Receive**
5. Enter received quantities (can be partial)
6. Note any discrepancies
7. Click **Complete Receipt**

2.5 Stock Adjustments

Navigation: Inventory → Adjustments

Record inventory changes outside normal transactions.

Adjustment Reasons

Reason	When to Use
Physical Count	After cycle count/annual inventory
Damaged	Goods damaged in storage
Expired	Products past expiry date
Lost	Cannot locate stock
Found	Located previously lost stock
Sample	Given as samples
Demo	Display/demo units
Write Off	Management approved write-off

Creating an Adjustment

1. Go to **Inventory → Adjustments**
2. Click **+ New Adjustment**
3. Enter:

Field	Description
Warehouse	Where adjustment is being made
Adjustment Date	When counted/discovered
Reason	Select from list
Reference	Count sheet number, etc.

4. Add items:
   - Product
   - Current System Qty (auto-filled)

- Actual Qty (what you counted)
- Variance (calculated)
- Notes
5. Submit for Approval

Adjustment Approval
- Minor adjustments (<5% variance): Auto-approved
- Major adjustments (>5%): Requires manager approval
- Write-offs: Requires finance approval

3. Warehouse Management (WMS)

3.1 Zones

Navigation: WMS → Zones

Zones are logical divisions of your warehouse.

Standard Zone Structure

Zone Code	Name	Purpose
RECV	Receiving	Incoming goods staging
QC	Quality Check	Inspection area
BULK	Bulk Storage	Main storage area
PICK	Picking	Order picking area
PACK	Packing	Order packing station
SHIP	Shipping	Dispatch staging
RET	Returns	Returned goods
DEF	Defective	Damaged/defective items

Creating a Zone
1. Go to **WMS → Zones**
2. Click **+ New Zone**
3. Enter:
   - Zone Code
   - Zone Name
   - Warehouse
   - Zone Type (Receiving, Storage, Picking, Shipping)
   - Is Active
4. Click **Save**

3.2 Bins (Locations)
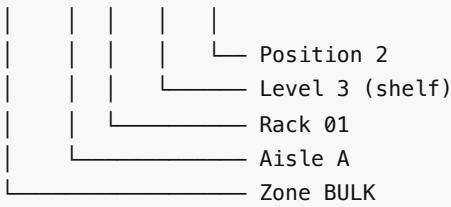
Navigation: WMS → Bins

Bins are specific storage locations within zones.

Bin Naming Convention

```
Format: [Zone]-[Aisle]-[Rack]-[Level]-[Position]

Example: BULK-A-01-03-02
          |    |   |   |    |
          |    |   |   |    └── Position 2
          |    |   |   └────── Level 3 (shelf)
          |    |   └────────── Rack 01
          |    └────────────── Aisle A
          └─────────────────── Zone BULK
```

Creating Bins

Option 1: Individual Bin

1. Go to **WMS → Bins**
2. Click **+ New Bin**
3. Enter:
    - Bin Code
    - Zone
    - Aisle
    - Rack
    - Level
    - Max Capacity (units or kg)
    - Bin Type (Storage, Pick, Reserve)
4. Click **Save**

Option 2: Bulk Create

1. Click **Bulk Create**
2. Select Zone
3. Define pattern:
    - Number of Aisles (A-E)
    - Racks per Aisle (01-10)
    - Levels per Rack (1-5)
4. System generates all bins automatically

Bin Types

Type	Purpose
Reserve	Long-term storage
Pick	Active picking location
Overflow	Temporary overflow
Cross-dock	Direct transfer (no storage)
Returns	Returned goods

Quarantine	QC hold items

3.3 Bin Enquiry

Navigation: WMS → Bin Enquiry

Find what's stored where.

Search Options

Search By	Description
Bin Code	Show contents of specific bin
Product	Find which bins have this product
Serial Number	Locate specific serial
Batch Number	Find batch locations
Empty Bins	List available bins

Using Bin Enquiry

1. Go to **WMS → Bin Enquiry**
2. Enter search criteria
3. View results:
   - Bin location
   - Product
   - Quantity
   - Batch/Serial
   - Last movement date

3.4 Putaway Rules

Navigation: WMS → Putaway Rules

Automated rules for where to store incoming goods.

Rule Types

Rule	Description
Product-based	Specific bins for specific products
Category-based	Zone assignment by product category
Velocity-based	Fast movers near picking, slow in back
FIFO	First In First Out
FEFO	First Expiry First Out (consumables)

Creating a Putaway Rule

1. Go to **WMS → Putaway Rules**

2. Click **+ New Rule**

3. Enter:

Field	Description
Rule Name	Descriptive name
Priority	Order of rule application (1 = highest)
Product/Category	What products this applies to
Zone	Preferred zone
Bin Type	Storage/Pick/Reserve
Allocation Method	FIFO, FEFO, Nearest

4. Click **Save**

Example Rules

Priority	Rule	Condition	Action
1	Fast Movers	Velocity = High	Zone: PICK
2	RO Membranes	Category = Consumables	Zone: BULK, FEFO
3	Water Purifiers	Category = Finished Goods	Zone: BULK, Rack A–C
4	Default	All others	Zone: BULK, Any bin

3.5 GRN and Putaway

When goods are received (GRN), putaway process:

```
GRN Created
      ↓
System applies putaway rules
      ↓
Suggests bin locations
      ↓
Warehouse staff confirms/changes
      ↓
Stock moved to bin
      ↓
Bin inventory updated
```

4. Logistics & Shipping

4.1 Transporters

Navigation: Logistics → Transporters

Manage your delivery partners.

Transporter Types

Type	Description	Example
COURIER	Express delivery partners	Delhivery, BlueDart
SELF_SHIP	Own delivery fleet	Company vehicles
MARKETPLACE	Platform logistics	Amazon Easy Ship
LOCAL	Local delivery	City courier
FRANCHISE	Franchisee delivery	Partner delivery

Adding a Transporter

1. Go to **Logistics → Transporters**
2. Click **+ New Transporter**
3. Enter:

Field	Description
Code	Unique code (e.g., DELHIVERY)
Name	Full name
Type	COURIER, SELF_SHIP, etc.
Contact Person	Primary contact
Phone	Contact number
Email	For communications
API Credentials	For integration
Is Active	Enable/disable

4. Click **Save**

4.2 Rate Cards

Navigation: Logistics → Rate Cards

Shipping rates by transporter, zone, and weight.

Rate Card Types

Type	Use Case
D2C	Direct to consumer (courier)
B2B	Business deliveries (LTL/PTL)
FTL	Full truck load

Zone Structure

Zone	Coverage	Example
A	Local (same city)	Delhi to Delhi
B	Within State	Delhi to Gurgaon
C	Regional	Delhi to Jaipur
D	Metro to Metro	Delhi to Mumbai
E	North East / J&K	Delhi to Guwahati
F	Remote	Islands, border areas

Creating Rate Card

1. Go to **Logistics → Rate Cards**
2. Select segment (D2C/B2B/FTL)
3. Click **+ New Rate Card**
4. Enter:
   - Transporter
   - Effective From/To dates
   - Service Type (Standard/Express)
5. Add weight slabs per zone:

Zone	0-0.5 kg	0.5-1 kg	1-2 kg	Additional /kg
A	₹40	₹50	₹65	₹25
B	₹50	₹60	₹80	₹30
C	₹60	₹75	₹100	₹35

6. Add surcharges:

   - Fuel surcharge (%)
   - COD charges
   - ODA charges

7. Click **Save**

4.3 Serviceability

Navigation: Logistics → Serviceability

Define which pincodes you can deliver to.

Serviceability Fields

Field	Description
Pincode	6-digit PIN code
City	City name

State	State name
Is Serviceable	Yes/No
COD Available	Cash on delivery allowed
Prepaid Available	Online payment only
Estimated Days	Delivery timeline
Transporters	Which couriers serve this PIN

Bulk Upload Serviceability

1. Go to **Logistics → Serviceability**
2. Click **Import**
3. Download template
4. Fill in Excel:
   - Pincode
   - City
   - State
   - Serviceable (Y/N)
   - COD (Y/N)
   - Days
5. Upload file
6. Review and confirm

4.4 Shipments

Navigation: Logistics → Shipments

Manage outbound deliveries.

Shipment Status Flow

```
ORDER PLACED
     ↓
READY_TO_SHIP (Packed, label printed)
     ↓
MANIFESTED (Handed to courier)
     ↓
PICKED_UP (Courier collected)
     ↓
IN_TRANSIT
     ↓
OUT_FOR_DELIVERY
     ↓
DELIVERED / RTO (Return to Origin)
```

Creating a Shipment

1. Go to **Logistics → Shipments**
2. Click **+ New Shipment**

3. Select Order (or create ad-hoc)
4. Enter:

Field	Description
Order Number	Source order
Customer	Delivery recipient
Delivery Address	Shipping address
Warehouse	Dispatch location
Weight	Actual weight
Dimensions	L x W x H
Package Count	Number of boxes
Payment Mode	COD/Prepaid
Declared Value	For insurance

5. Select Transporter (or let system auto-allocate)
6. Click **Create Shipment**

Auto Allocation

System can automatically select best transporter based on:

- Serviceability (can deliver to PIN)
- Cost (cheapest option)
- SLA (fastest delivery)
- Performance (best delivery rate)

Allocation Rules: Logistics → Allocation Rules

4.5 Manifests

Navigation: Logistics → Manifests

Group shipments for courier handover.

Creating a Manifest
1. Go to **Logistics → Manifests**
2. Click **+ New Manifest**
3. Select:
    - Transporter
    - Pickup Date
    - Warehouse

4. Add shipments:
    - System shows ready shipments
    - Select shipments to include

5. Click **Generate Manifest**
6. Print manifest document

7. Handover to courier with packages

Manifest Status

Status	Meaning
Open	Adding shipments
Closed	Finalized, ready for pickup
Picked Up	Courier collected
Processed	Courier scanned all packages

4.6 SLA Dashboard

Navigation: Logistics → SLA Dashboard

Monitor delivery performance.

Key Metrics

Metric	Target	Description
On-Time Delivery	>95%	Delivered within promised time
RTO Rate	<5%	Return to origin rate
Delivery Attempts	<1.5 avg	Attempts before delivery
First Attempt Delivery	>80%	Delivered on first try
NDR Resolution	<24 hrs	Non-delivery report resolution

SLA by Zone

Zone	Standard SLA	Express SLA
A (Local)	1-2 days	Same day
B (State)	2-3 days	1-2 days
C (Regional)	3-4 days	2-3 days
D (Metro)	3-5 days	2-3 days
E (NE/J&K)	5-7 days	4-5 days
F (Remote)	7-10 days	5-7 days

4.7 Tracking

Track shipments in real-time:

1. Go to **Logistics → Shipments**
2. Click on shipment
3. View tracking timeline:

- Pickup time
- Hub movements
- Out for delivery
- Delivery attempt
- Delivered / RTO

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5. Common Workflows

5.1 Goods Receipt (GRN) to Putaway

```
1. PO arrives at warehouse gate
     ↓
2. Verify documents (Invoice, DC, PO copy)
     ↓
3. Unload and stage in RECV zone
     ↓
4. Create GRN (Procurement → GRN)
     ↓
5. Quality check (QC zone)
     ↓
6. Accept/Reject items
     ↓
7. System suggests putaway locations
     ↓
8. Move goods to assigned bins
     ↓
9. Confirm putaway in system
     ↓
10. Stock updated and available
```

5.2 Order Picking and Packing

```
1. Order received (status: Confirmed)
     ↓
2. System reserves inventory
     ↓
3. Picklist generated (Orders → Picklists)
     ↓
4. Picker collects items from bins
     ↓
5. Verify picked items (scan serials)
     ↓
6. Move to PACK zone
     ↓
7. Pack items, print invoice & label
     ↓
8. Create shipment
     ↓
9. Move to SHIP zone
     ↓
```

```
10. Add to manifest
       ↓
11. Handover to courier
```

5.3 Stock Transfer Between Warehouses

```
1. Identify need for stock at destination
       ↓
2. Create transfer request
       ↓
3. Get approval (if required)
       ↓
4. Pick items at source warehouse
       ↓
5. Pack and create shipment
       ↓
6. Update transfer to "In Transit"
       ↓
7. Ship to destination
       ↓
8. Receive at destination warehouse
       ↓
9. Verify quantities
       ↓
10. Complete transfer
       ↓
11. Stock updated at both locations
```

5.4 Handling Returns (RTO)

```
1. Shipment returned by courier
       ↓
2. Receive at RECV zone
       ↓
3. Verify AWB/Shipment number
       ↓
4. Inspect condition
       ↓
5. If good → Return to PICK zone
   If damaged → Move to DEF zone
       ↓
6. Update system:
   – Mark shipment as RTO received
   – Create stock adjustment (if damaged)
   – Update inventory
       ↓
7. Process refund/reship (as applicable)
```

5.5 Cycle Count

```
1. Generate count sheet (selected bins)
      ↓
2. Print count sheet
      ↓
3. Physical count by team
      ↓
4. Record actual quantities
      ↓
5. Enter in system (Inventory → Adjustments)
      ↓
6. System calculates variance
      ↓
7. Investigate large variances
      ↓
8. Submit for approval
      ↓
9. Adjustments posted
      ↓
10. Inventory corrected
```

6. Reports & Analytics

6.1 Inventory Reports

Report	Purpose
Stock Summary	Current stock by warehouse
Stock Aging	How long items in stock
Stock Movement	Inward/outward history
Reorder Report	Items below reorder level
Dead Stock	No movement in 90+ days

6.2 Warehouse Reports

Report	Purpose
Bin Utilization	Space usage by zone
Putaway Efficiency	Time to putaway
Pick Efficiency	Picks per hour
Inventory Accuracy	Count vs system variance

6.3 Logistics Reports

Report	Purpose
Shipment Summary	Daily/weekly shipments

Transporter Performance	Delivery rates by courier
Zone-wise Cost	Shipping cost by zone
RTO Analysis	Return reasons & rate
SLA Compliance	On-time delivery %

6.4 Key Metrics to Monitor

Daily:

- Orders pending shipment
- Shipments in transit
- RTOs received
- Inventory alerts (low stock)

Weekly:

- Delivery success rate
- Average delivery time
- Warehouse throughput
- Pending transfers

Monthly:

- Inventory turnover
- Shipping cost per order
- RTO rate
- Storage utilization

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7. Troubleshooting

Common Issues

Problem	Cause	Solution
Cannot create shipment	No transporter for PIN	Check serviceability, add transporter
Stock mismatch	Unreported movement	Do cycle count, adjust
Bin not found	Incorrect code	Verify bin exists in WMS
Transfer stuck	Not approved	Check approvals, escalate
Wrong allocation	Rules priority	Review allocation rules

Error Messages

Error	Meaning	Action
"Insufficient stock"	Not enough available	Check reservations, adjustments
"PIN not serviceable"	Cannot deliver to PIN	Add to serviceability

"Bin at capacity"	Bin full	Use alternate bin
"Invalid weight"	Weight not entered	Enter package weight
"Transporter inactive"	Transporter disabled	Activate or use alternate

Quick Reference Card

Daily Tasks - Warehouse Executive

Time	Task	Navigation
8:00 AM	Check pending GRNs	Procurement → GRN
9:00 AM	Process GRN receipts	GRN → Receive
10:00 AM	Complete putaway	WMS → Putaway
11:00 AM	Pick orders	Orders → Picklists
2:00 PM	Pack and label	Packing station
3:00 PM	Create shipments	Logistics → Shipments
4:00 PM	Generate manifest	Logistics → Manifests
5:00 PM	Handover to courier	Physical handover

Daily Tasks - Logistics Coordinator

Time	Task	Navigation
9:00 AM	Check delivery status	Logistics → Shipments
10:00 AM	Follow up NDRs	Shipments → Filter: NDR
11:00 AM	Coordinate RTOs	Shipments → Filter: RTO
2:00 PM	Monitor SLA	Logistics → SLA Dashboard
4:00 PM	Escalate delays	Contact transporters
5:00 PM	End of day report	Reports

Document prepared for Aquapurite ERP v1.0