

DS Warehouse

"Streamline Your Stock, Master Your Moves."

Overview

DS Warehouse is a comprehensive inventory and logistics management application designed to streamline stock handling across multiple warehouses. It enables businesses to efficiently track stock in, stock out, damages, and returns while integrating account details. Built for scalability, DS Warehouse supports real-time updates, multi-warehouse operations, and empowering businesses to optimize their supply chain and reduce operational costs.

Highlights

 **Stock In/Out Tracking:** Monitor incoming and outgoing stock with real-time updates, ensuring accurate inventory levels across all warehouses.

 **Damage and Returns Management:** Record and manage damaged goods and customer returns, with automated workflows for restocking or disposal.

 **Multi-Warehouse Support:** Centralize operations for multiple warehouses, with visibility into stock levels, transfers, and logistics for each location.

 **User-Friendly Design:** Intuitive web interface for warehouse staff, managers, and accountants to collaborate effortlessly.

 **Warehouse-Specific Inventory Summaries:** Generate detailed, real-time inventory summaries for each warehouse linked to an account, providing clear insights into stock levels, movements, and statuses for precise management.

Setup & User Guide

Installation

- **Install from AppExchange:** Visit the DS Warehouse listing, click "**Get It Now,**" and install it into your Salesforce org (Production or Sandbox).

Permissions

- Ensure your Salesforce user profile has access to respective tabs.
- Ensure your Salesforce user profile has "**Create**" and "**Edit**" access to respective objects.

Setup Instructions for Assigning Lightning Record Pages in Salesforce

Assign Lightning Record Pages to Record Types, Apps, and Profiles

1. Activate and Assign the Page

- a. Navigate to **Setup** → **Object Manager** → **Inventory**.
- b. Select "**Lightning Record Page**" and choose the "**Dispatch**" record type.
- c. Click **Activation** (top-right corner).
- d. In the **Activation Wizard**, go to the **App, Record Type, and Profile** tab.
- e. Click "**Assign to Apps, Record Types, and Profiles.**"

2. Configure Assignments

- a. **Step 1: Select App** → Choose "**DS Warehouse Management**".
- b. **Step 2: Select Form Factor** → Desktop, Phone, or both.
- c. **Step 3: Select Record Type** → Assign accordingly:
 - i. "**Dispatch**" for **Inventory Dispatch Record Page**.
 - ii. "**Damage**" for **Inventory Damage Record Page**.
 - iii. "**Return**" for **Inventory Return Record Page**.
- d. **Step 4: Select Profiles** → Assign to "**Warehouse Staff**", "**System Administrator**", etc.
- e. **Step 5: Review and Save** → Finalize assignments.

3. Repeat for Each Record Type

- a. Repeat activation for **Dispatch**, **Damage**, **Return** pages, linking each to its respective record type.

Record Setup

- Open the "**DS Warehouse**" app.
- Navigate to the following tabs and create records:
 - o  **Warehouse**
 - o  **SKU**
 - o  **Account Warehouse**
 - o  **Port**

Core Features

Stock In/Stock Out Tracking

Stock In Process

1. Navigate to **Inventory > New** → Select "**Stock In**" record type.
2. Enter:
 - a.  **Warehouse** (destination).
 - b.  **Product Details (SKU, Account Warehouse, Stock In Value)**.
 - c.  **Status**: Set to "**None/Offloading Started**".
3.  **Inventory Impact**:
 - a. **In Transit Summary** updates with Stock In Value.
4. ☒ **Update Status to "Offloading Completed"**:
 - a. **Available Stock & Total Stock** increase.
 - b. **In Transit Summary** decreases.
5. ☐ **Return Checkbox**: If checked, denotes that the Stock In contains repaired damage products. Enabling this adds the Stock In value directly to Available Stock.
6.  **Location fields reference Port records. Select the relevant port for the Stock In entry.**

Stock Out Process

1. Navigate to **Inventory > New** → Select "**Dispatch**" record type.
2. Enter:

- a.  **Warehouse**
- b.  **Product Details (SKU, Account Warehouse, Stock Out Value).**

Damage and Returns Management

Recording Damages

- Navigate to **Inventory > New** → Select "**Damage**" record type.
- Enter: **Warehouse, SKU, Damage Value** → Deducts from **Available Stock**.

Managing Returns

- Navigate to **Inventory > New** → Select "**Return**" record type.
- Enter: **Warehouse, SKU, Return Value** → Adds to **Total Stock**.

Automated Workflows

- System flags items for  **Restocking** or  **Disposal** based on rules.

Key Restrictions

-  **Editing Restricted:** Stock In/Out, Damage, Return values in existing records.
-  **Deletion Restricted:** Records cannot be deleted.

Use Cases & Solutions

Case 1: Stock In Value Entered Lower Than Actual

-  **Solution:** Create an additional **Stock In** record to adjust.

Case 2: Stock In Value Entered Higher Than Actual

-  **Solution:** Create a **Stock In** record with a **negative value (-)**.

Warehouse-Specific Inventory Summaries

- Navigate to "Inventory Summary" → Select **Account Warehouse-SKU** to view:
 -  **Available Stock**
 -  **Total Stock** (all transactions).

Insights & Analytics

- Analyze  **stock trends**.
- Identify  **slow-moving items**.
- Plan  **restocking efficiently**.

Inventory Formulas

 **Available Stock** = Stock In - (Damage + Stock Out)

 **Total Stock** = Stock In - Stock Out + Return

Operation	Available Stock	Total Stock
Stock In	Stock In Value	Stock In Value
Damage	Stock In Value - Damage Value	Stock In Value
Stock Out	Stock In Value - (Damage Value + Stock Out Value)	Stock In Value - Stock Out Value
Return	Stock In Value - (Damage Value + Stock Out Value)	Stock In Value - Stock Out Value + Return Value

Inventory Summary Formulas

- **Total Stock** = Available Stock + Damage Summary + Return Summary
- **Stock IN Summary** = Available Stock + Dispatched + Damage Summary