

How to Add New Storage Unit

This screen allows configuration of Storage Location for a Storage Type. These Locations can be storage bins, dock door, forklift etc.

If a company location has sub locations, then storage locations will be for a sub location. Sub location has to be selected.

If company location does not have sub locations, then storage locations are for the company location

Relationship to third party warehouses:

To manage storage in third party warehouses, we will set up these warehouses as a sub-location of the basic location (profit center). To indicate locations within a warehouse, use the Storage Location field. Warehouses will also have to be set up as entities in order to process invoices. For some functionality like "warehouse rate matrix" we will require a linking of the sub-location warehouse (where the product is held) to the entity warehouse (where the bill is paid). This may be done on the warehouse rate matrix screen, pending a general analysis of how warehouse bills will be processed.

1. From Inventory module > click on **Storage Units menu**.
2. The Search screen for Storage Units will be shown. Click **New toolbar button**.
3. This will open a **new Storage Unit screen**.

The screenshot shows the 'Storage Unit' configuration window. The 'Name' field is empty. The 'Storage Unit Type' is set to 'Storage'. The 'Location' is '0001-Fort Wayne' and 'Storage Location' is 'Raw Station'. The 'Parent Unit' is 'RM Storage'. The 'Restriction Type' is set to 'None'. The 'Batch Size' is '0'. The 'Batch Size UOM' is 'None'. The 'Capacity' section has 'Effective Depth' at '0', 'Units Per Foot' at '0', and 'Residual Units' at '0'. The 'Position' section has 'Active' unchecked. The 'Options' section has all checkboxes unchecked.

4. Enter the **Name** and **Description** of the storage Unit.
5. Select the Storage Unit Type.
6. Select the **Unit** and **Sub Unit** where this storage Unit be under/found.
7. Select the **Parent Unit** as necessary.
8. Fill in all other information as necessary.

The screenshot shows the 'Storage Unit - Test Storage Unit' configuration window. The 'Name' field is 'Test Storage Unit'. The 'Description' is 'Test Storage Unit'. The 'Storage Unit Type' is 'Storage'. The 'Location' is '0001-Fort Wayne' and 'Storage Location' is 'Raw Station'. The 'Parent Unit' is 'RM Storage'. The 'Restriction Type' is set to 'None'. The 'Batch Size' is '0'. The 'Batch Size UOM' is 'None'. The 'Capacity' section has 'Effective Depth' at '0', 'Units Per Foot' at '0', and 'Residual Units' at '0'. The 'Position' section has 'Active' unchecked. The 'Options' section has all checkboxes unchecked.

9. Save the record. You can click the **Save toolbar button** to save it. In case you miss to click this button and you click the **Close toolbar button** or the **x button** at the top right corner of the screen, i21 will prompt you if you would like to save it before closing the screen.