



# CASE STUDY



By AbleOwl

## EXCEL AUTOMATION PROJECT

### Work done for

Warehouse and Distribution Solutions (WADS)

### Summary

WADS needed a simple visual way of tracking the storage at each location of a warehouse and, thereby, increasing operational efficiency.

### Price range of work done

US\$5,000-10,000.

### Video



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The video is mp4 format.

John Malfitana, General Manager, says "Having a full visual of the stock in our warehouse through this mapping software has improved our flow tenfold."

## Warehouse map stock tracking



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Warehouse and Distribution Solutions provides an efficient warehousing and transport model, which includes bulk storage, pick and pack, fast moving consumer goods, same day, next day and regional delivery services.

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Excel custom applications, presenter-led courses, webinar recordings on 60 one-hour topics, Knowledge Base, hotline support and the study and qualification Certified Professional in Excel for Finance.

# Warehouse map stock tracking

Excel is ideal for providing a visual map of a warehouse

Locate stock visually to help increase warehouse operational efficiency

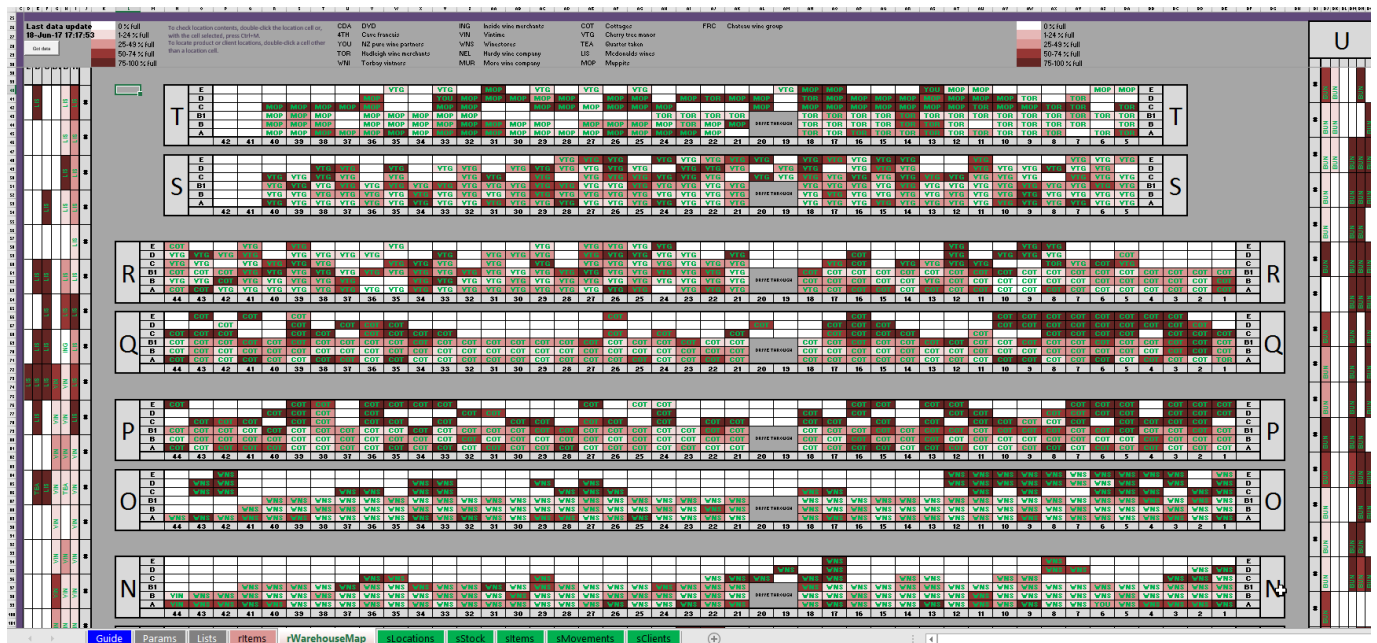
Warehouse staff have various needs as follows:

- See graphically the locations of certain stock.
- See how full each stock location is.
- Generate reports and one in particular that lists the fastest-moving products.

With that information, the staff can operate the warehouse more efficiently.

There are aisles, rows and levels

The screenshot below, with the screen zoom set to a small size, shows the top of the warehouse map. There are various aisles lettered R, S, T etc. Each aisle has rows numbered 1, 2, 3 etc. There are also 6 levels: A, B, B1, C, D, E. An example location is T15B, that is, aisle T, row 15, level B.



The spreadsheet visually maps the aisles, rows and levels of the warehouse. The pink cell fill shows how full a location is. A 3-letter code identifies which client's stock is at a location.

Each cell is a warehouse location and the pink fill shade indicates the % full

Each location is a single Excel cell. The cell fill is one of five shades of pink where the darkest shade is the most full, that is, 75-100% full. The three-letter code in a cell is a client code.

Double-click a location cell to see the contents

To see the contents of a location, double-click the location cell. A dialog box as shown below then displays the location contents.

Client name	Item code	Item description	Units	Units/ carton	Cartons	Client code
CHERRY TREE M,	159566	AG AWANUI R SHIRAZ 6PK	96	6	16.00	VTG
CHERRY TREE M,	125192	GLENFISHHOOK 1988 CASK 700ML 1PK	3	1	3.00	VTG
CHERRY TREE M,	103942	DOUBLE BLOSSOM VINTAGE 6PK	18	6	3.00	VTG

Double-click a location cell to see what stock is in that location.

### Highlight with a yellow border all locations for selected products

To see the locations of selected products, first, double-click a cell that is not a location cell. A dialog box appears such as that shown below. Then, select the products to find and click the *Highlight product* button. The spreadsheet displays the found locations by placing a yellow highlight around each cell as shown below.

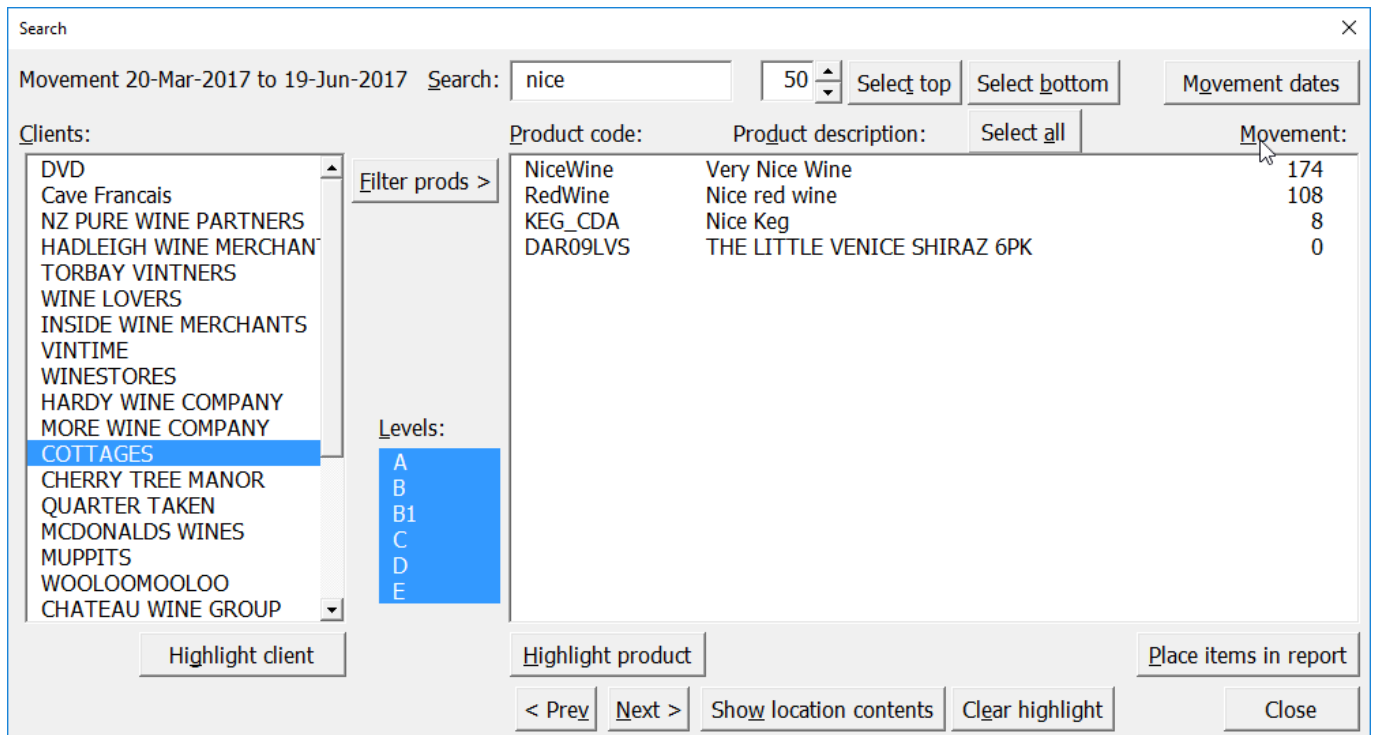
The dialog box shows a search for 'Movement 20-Mar-2017 to 19-Jun-2017'. The product list includes items like 'DesertWine', 'WhiteWine', and 'RedWine'. The 'Highlight product' button is visible. The spreadsheet background shows a grid of cells with various status codes like 'VTG', 'COT', and 'LIS', some of which are highlighted in yellow.

Find the locations of certain products by applying a yellow-fill border.

To see the yellow-highlighted cells, either close the dialog box and visually scan or click the Next button repeatedly to move from one highlighted cell to another.

### Apply various filters

The dialog box has various filters that can be applied. A user can filter to just products for certain clients or levels. There is also a filter by product code or description. For example, as shown below, typing *nice* into the search box instantly filters the products to those that contain that word in the code or description.



Type text into the Search box to instantly filter the products for those that contain the text in the code or description

### Sort to find the fastest movers

The products can be sorted. To do that, simply click the column title. For example, to sort by the fastest-moving products, click the Movement title.

To create a report that lists, say, the 50 fastest movers, after sorting by movement, click *Select top* and then click *Place items in report*.

### The workbook updates each 5 mins from SQL Server

The stock data is in a SQL Server database. Each 5 minutes, the spreadsheet automatically downloads the latest data, thereby keeping the data up to date.

### Powerful Excel formatting capabilities meant that the application could be developed for relatively little cost

Salient points to make about the application are:

- The visual nature and powerful formatting capabilities of Excel meant that the application could be developed for relatively little cost.
- Excel downloads SQL Server data very quickly.
- Users' familiarity with Excel makes it easy and efficient for them to operate.
- The stable Excel platform provides a long-term solution with minimal maintenance costs in which internal non-IT specialists retain some control.

### John Malfitana, General Manager, says "Having a full visual of the stock in our warehouse through the this mapping software has improved our flow tenfold."

John Malfitana, General Manager at Warehouse and Distribution Solutions, says:

"Having a full visual of the stock in our warehouse through this mapping software has improved our flow tenfold. That not only saves time in walking around the warehouse and searching locations, but also helps manage the whole warehouse. It helps with placement of fast-moving product on the floor from client to client and makes stock picking quicker.

Seeing the positions on a report is good, but to have the whole of the warehouse mapped out on a screen with the different levels of stock just makes the planning of the moving in of clients and stock a breeze. Given that the application is connected to our proprietary WMS Zeus system and the simplicity of its use, it's worth the cost."