EasyWMS Warehouse Appointments User Guide

Request, schedule, and manage client-facing warehouse appointment activity without exposing the internal Company Calendar.

Who should use this guide

- Client portal users who request inbound, container, return, cross-dock, or other warehouse appointments.
- Internal warehouse users who approve, schedule, check in, complete, cancel, or mark appointments as no-show.
- Managers who review inbound demand, dock planning, and future scheduling enhancements.

Table of Contents

1. What Warehouse Appointments Is

Warehouse Appointments is the client-facing scheduling workspace in EasyWMS. It is separate from the internal Company Calendar. Company Calendar is for internal events only, while Warehouse Appointments is where client requests and inbound purchase-order planning belong.

The module combines a month calendar, appointment request/edit form, filters, status badges, and an appointment queue so teams can work visually or from a list depending on the screen size and workflow.

- Use Warehouse Appointments for client-visible warehouse scheduling.
- Use Company Calendar only for internal company events.
- Inbound purchase orders with expected dates appear as inbound warehouse appointments.
- Client users only see clients they are allowed to access.

2. Access and Navigation

Open the Warehouse Appointments menu item. Users need the appointments.view right to see the screen. Client roles may receive appointments.view, but client roles should not receive calendar.view because the Company Calendar is internal-only.

Area	Value
Menu item	Warehouse Appointments
Frontend route	/appointments
API route	/api/appointments
Required right	appointments.view

Internal calendar	Company Calendar at /calendar

3. Screen Layout

The screen is built as a calendar/list hybrid. The top toolbar controls the month and filters. The calendar shows appointment placement by day. The form creates or edits the selected appointment. The queue shows rows in operational sequence.

Desktop users can drag the splitters between the calendar, form, and queue to fit different monitor sizes.

- Calendar: best for visual dock planning and loaded-day review.
- Form: best for creating requests or updating scheduling details.
- Queue: best for reviewing several appointments quickly.
- Filters: use month/date, status, type, and client filtering to reduce noise.

4. Appointment Types

Clients can request inbound, container, return, cross-dock, and other appointment types. Outbound is internal-only in the current release because customers should continue using Orders and eOrders to place outbound work.

Type	Use
Inbound	Expected inbound goods, including PO-linked arrivals.
Container	Container delivery, unloading, or container-related scheduling.
Return	Return loads or reverse-logistics arrivals.
Cross-dock	Loads expected to move through the warehouse quickly.
Other	Any approved warehouse appointment that does not fit the standard types.
Outbound	Internal-only pickup or dock scheduling around existing outbound work.

5. Statuses

Status tells both operations and clients where the appointment is in the workflow. Internal users control operational status changes after a request is created.

Status	Meaning
Requested	The appointment has been requested or synced from an ordered inbound PO.
Approved	Operations accepted the request but may still finalize schedule details.
Scheduled	The appointment has a scheduled time, warehouse, or dock assignment.
Checked In	The driver, carrier, or load has arrived.
Completed	The warehouse work is complete.
Cancelled	The appointment is cancelled.
No-Show	The appointment did not arrive as expected.

6. Client Request Workflow

Client users can create appointment requests for their allowed client accounts. A client with access to more than one client may choose from only those allowed clients.

1. Open Warehouse Appointments.
2. Choose the client if more than one allowed client is available.
3. Select the appointment type.
4. Enter the requested start date and time.
5. Add PO, BOL, container, carrier, pallet/carton count, and notes when available.
6. Submit the request.
7. Monitor the status as operations approves, schedules, checks in, completes, cancels, or marks no-show.

- Clients can edit or cancel their own requested appointments before operations advances the status.
- Clients cannot assign warehouse or dock details.
- Clients cannot write internal notes or operational lifecycle timestamps.
- Clients cannot create outbound appointments.

7. Internal Operations Workflow

Internal users use Warehouse Appointments as the operational scheduling board. They can review all clients, filter the board, and update the appointment lifecycle.

1. Filter by client, status, type, or date range.
2. Select the appointment from the calendar or queue.
3. Review references, carrier details, requested time, counts, and notes.
4. Approve or schedule the request.
5. Assign warehouse and dock when known.
6. Use Checked In when the load arrives.
7. Use Completed when warehouse work is finished.
8. Use Cancelled or No-Show when the appointment will not proceed.

8. Inbound Purchase Order Sync

Inbound purchase orders with expected dates sync into Warehouse Appointments as inbound appointment records. This moves inbound PO planning out of Company Calendar and into the warehouse scheduling module.

- Changing a PO expected date should update the appointment date.
- Deleting a PO or removing its expected date should soft-delete the linked appointment.
- PO-linked appointments remain in Warehouse Appointments, not Company Calendar.

Purchase Order Status	Appointment Status
Ordered	Requested
Receiving	Checked In
Received	Completed
Cancelled	Cancelled

9. Security Rules

Warehouse Appointments is client-accessible, so scoping rules are strict. The server resolves client scope from the authenticated session user instead of trusting request body or query values.

- Authentication is required for every appointments API call.
- Client users see only their allowed client set.
- Internal users can see all clients and filter by client.
- Client users cannot spoof another client ID.

- Client users cannot write internal notes, scheduled times, warehouse, dock, status approval fields, or lifecycle timestamps.
- Client users cannot write raw internal orderid, eorderid, or receiptid fields.
- Deletes are soft deletes.

10. Future Enhancements

The current release establishes the appointment model and safe client-facing workflow. Later enhancements should build on Warehouse Appointments instead of moving scheduling back into the Company Calendar.

- Dock capacity and conflict detection by warehouse, dock, type, and time window.
- Warehouse hours, blackout dates, holidays, cutoff windows, and lead-time rules.
- Drag-and-drop scheduling with quick approve and reschedule actions.
- Separate create, edit, approve, cancel, check-in, complete, and no-show rights.
- Client self-service reschedule windows with approval rules.
- Email and SMS notifications for appointment changes.
- Calendar export or subscription support.
- Appointment audit history and attachment support.
- Carrier or driver check-in workflows.
- KPI reporting for no-shows, dock utilization, dwell time, and schedule adherence.
- Lookup pickers for POs, orders, eOrders, receipts, BOLs, and containers.
- Expanded outbound pickup scheduling tied to Orders, eOrders, and Freight.
- EDI/API appointment request intake and automated status transitions.