

SPACE MANAGEMENT & BILLING

Space Management Overview

Organizations that manage boxed records within their own warehouse, as opposed to storing them off site, realize the advantages of increased records information access and retrieval times, but also incur significant capital and personnel expenses to maintain the facility.

In such a scenario, the implementation of contemporary technology may be applied to maximize the available space while also increasing the workflow efficiency of the warehouse staff.

Application

In addition to providing the basic capabilities for our warehouse clients such as barcode labeling and scanning, pickup and delivery reports, and complete location history of all boxes and files, Infolinx WEB also offers an advanced space management module, along with an optional billing component.

The Infolinx WEB™ Space Management module enables our clients to efficiently manage the available space in their warehouse, identifying contiguous or readily accessible open spaces in anticipation of incoming inventory, as well as analyze space usage and view trend analyses over time, providing insight into future facility needs.

Features & Benefits

- Management of multiple warehouses or storage areas
- Graphical representation of both filled and empty spaces
- Limiting searches for available space to particular areas, aisles, or bays
- Excluding hard-to-access top or bottom shelves from available space queries
- Facility space needs forecasting via trend analysis
- Detection of over-capacity shelves resulting from user inventory error
- Identification of contiguous open spaces for incoming accessions

Billing Overview

Space management can also be integrated with **billing and invoice** services that are related to the monthly storage and activity fees of housed records. Designed with flexibility in mind, an unlimited number of customers can be defined, charges automatically assigned reflective of work performed, and invoices seamlessly generated and tracked.

Generate storage invoice data

Generate a list of charges for storage fees

Create Storage Invoice Data

Select Rate Class: Storage
 Choose one or more Customers. If no Customer is selected, Invoice Data will be generated for all Customers.

Select All Remove All Selected Customers

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Quick Description	Customer Name	Customer Number	Customer Unit Name	Customer Unit Number
Customers				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Search"/>	<input type="button" value="Clear"/>	<input type="button" value="(Rollover for Current Search)"/>		<input type="button" value="Switch"/>

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Customer Name	Customer Number	Customer Unit Name	Customer Unit Number

Enter Service Date Range:
 Enter Email:

Generate an invoice

Collects charges for a specific period and provides a PDF invoice

Invoice Date : 2/14/2018

Kingston, City of
 420 Broadway
 Kingston, NY

Period: 01/01/2018 - 01/31/2018			
Service	Quantity	Rate	Totals
0.1 Cubic Feet Records Storage	1	0.02917	\$0.03
1.0 Cubic Feet Records Storage	254	0.29170	\$74.09
Amount due for this Invoice			\$74.12

Notes:

Create a new billing event

Create a new billing event so the system can automatically generate an invoice charge

Add Billing Event

Choose Tab: Box
 Choose Action: Transfer
 Choose Request Type: Send Copy to Customer
 Choose Transfer From Charge Designation: Chargeable - Storage Choose Transfer To Charge Designation: Chargeable - Circulation

Archival Storage Box

Service Notes Rate

Search Here:

Current Search: Find all Rate.

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Service	Notes	Rate
<input type="radio"/> Polyester Wrapping Strips, Clear	2" x 500' 1 roll	66.49000
<input type="radio"/> Standard Storage Box (Individual Box)	15" x 12" x 10"	1.89000
<input type="radio"/> Tissue Paper, Buffered Acid-Free	40" x 250' 1 roll	99.96000
<input type="radio"/> Tissue Paper, Buffered Acid-Free	40" x 250' 1 foot	0.40000
<input type="radio"/> Tubes, Heavy-Duty for Roll Storage	4" x 3" dia 1 tube	16.20000
<input type="radio"/> Unbleached Cotton Tying Tape	5/16" x 1000 yd 1 spool	56.70000
<input type="radio"/> Unbleached Cotton Tying Tape	5/16" x 1000 yd 1 yard	0.05700
<input checked="" type="radio"/> Archival Storage Box	15" x 12" x 10" 1 box	11.17000
<input type="radio"/> Courier Service	Courier Service Outside the City of Kingston	30.00000
<input type="radio"/> Retrieval Request	AKA "Reference Request" for Record Retrieval	1.50000

Choose Rate:
 Choose multiplier:



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