ops.benchwick.com User Manual

Customer orders, factory invoices, inbound reconciliation, BOLs, weight calculations — the work that used to mean bouncing between systems, manual double-checking, and missed steps, now lives in one tool. Upload a document and the system reads it, creates the record, and emails everyone who needs to know — less typing, fewer mistakes, fewer follow-up questions.

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Menu	Route	What it does
New PO	`/newpo`	Upload a customer PO, auto-create the order and send a confirmation email
Invoice	`/inpl`	Upload a factory invoice, post the books and send the customer invoice
Inbound	`/inbound`	Upload a factory packing list, check it against inbound records
BOL	`/bol`	Upload an HD packing slip, generate the Bill of Lading
Order Weight	`/order-weight`	Pick a series and enter cartons to get weight and pallet count
WhatsApp Roster	`/wa-roster`	Manage the ordering bot's access whitelist
Team	`/team`	Manage accounts and permissions (admin only)

See each tool's own guide for step-by-step instructions.

New PO

`/newpo`

1. Drag the customer's PO PDF into the upload area, one file at a time.
2. Wait for the system to read the customer, PO number, address, SKUs, quantities, and prices.
3. When everything is confirmed, the order and confirmation email are created automatically — no action needed.
4. If something's missing, a "Complete missing order details" window opens. Review or fill in:
    - QuickBooks customer
    - Invoice recipient email
    - Customer PO number
    - Shipping address (address, city, state, ZIP)
    - Line items (SKU, description, quantity, unit price)

   Click "Continue automatic processing" when done.
5. The order list shows email status and Shopify sync status for each order.
6. If an order fails, click "Retry" — **don't re-upload the PDF**.
7. Don't upload the same PO twice. If a customer sends a revised PO, check the order list first for an existing entry.

Invoice

`/inpl`

1. Upload the factory's IN&PL PDF.
2. The system parses it and shows a preview: invoice number, date, line items, customer.
3. Check the matched customer; pick manually if it's wrong.
4. Once everything looks right, pick a button:

    - **Post** — creates the documents and emails the customer
    - **Post only** — creates the documents without sending the email
    - **Resend** — appears if this invoice was already posted; resends the email without creating duplicates
5. After posting, you'll see the invoice number, amount, and email result.

Inbound

`/inbound`

Only upload packing lists starting with **BW-NDC** (PDF or Excel). `BW-CA` documents go through `/inpl` instead.

1. Drag the packing list into the upload area — it parses automatically.
2. Check the header (invoice number, date, warehouse), any yellow warning box, and the line item table.
3. If a line shows in red (unmapped), ask an admin to add a mapping — don't force-save it.
4. Once it checks out, click **Record as expected arrival** — this also automatically pushes an inbound order to ShipOut per container, so warehouse staff no longer need to raise it by hand.
5. Switch to the **Reconciliation board** to review results and act on alerts:

Alert	What to do
NOT IN SHIPOUT	Check immediately — goods may have arrived unrecorded
WRONG PO	Ask the warehouse to fix the PO field
WRONG FIELDS	Ask the warehouse to swap PO and container number
WRONG WAREHOUSE	Confirm which warehouse the goods actually went to
DUPLICATE	Priority — avoid double-counting inventory
EXTRA	Check whether it's a data error or a missing document
NOT RECEIVED	Follow up with the warehouse after 45 days
NOT VISIBLE	Check ShipOut's back office manually

If a container's ShipOut order fails to create (e.g. a SKU isn't approved yet in ShipOut's product catalog), saving still succeeds here — but that container will show as `NOT IN SHIPOUT` next time you check the Reconciliation board. Treat it the same as any other alert: check ShipOut's back office, and ask the warehouse to raise it manually if needed.

BOL

`/bol`

1. Pick a **Ship From** warehouse (leave blank to use the system default).
2. Drag the HD packing-slip PDF into the upload area.
3. Click **Generate Bills of Lading**.
4. Results are grouped into three sections:
    - **Ready to print** — click Download, or Download all for the whole batch
    - **Need attention** — needs manual handling, with a reason shown per PO
    - **Parcel, skipped** — parcel shipments don't need a BOL
5. Generated BOLs may carry a badge: **Auto-fixed** (something was corrected automatically) or **Review** (needs a manual check). No badge means no issues.

Order Weight

`/order-weight`

1. Pick a product series (6 available: rc-402, rc-605, rc-810, so-lite, so-select, so-plus).
2. Enter a carton count or square footage.
3. The page immediately shows net weight, pallet count, and gross weight per pallet.

WhatsApp Roster

`/wa-roster`

1. The page lists entries in two groups: sales and dealer.
2. **To add**: enter phone number and name, pick a role (dealer also needs a Shopify customer ID), then submit.
3. **To disable**: click the toggle — this doesn't delete the entry.
4. **To delete**: click delete and confirm.
5. Changes take effect in about a minute, no deployment needed.

Team

`/team` · Admin only

1. The page lists all users. Role, region, language, and active status can be edited directly in the table and save immediately.
2. **To add an account**: click "Add", fill in name, phone, role, region, language, then submit — this generates a login passcode.
3. The passcode is shown **only once** — write it down and send it to the person right away. If lost, it can only be reset, not recovered.
4. Existing accounts can have their passcode reset the same way.
